OLIVER: Hello, team. This is Oliver with the ePlanning team. And we are going to be learning how to manage documents on the project summary site in Back Office.

In the previous Back Office, all necessary documents needed to be uploaded into D2 prior to navigating to the project summary site. Now you can seamlessly edit and manage your documents directly from the summary site. Navigate to Back Office dashboard. And under My Projects, select the desired NEPA number.

On the summary page, select the Add Page button and select the documents if you don't already have them loaded. Click the Add button and the selected categories will populate under project summary. Select the Documents page and click inside the text editor box and add any text if desired. And click Save.

Note. You can select the Cancel button if you want to discard any changes made before clicking the Save button. Please note you can also add images to the description by locating and clicking the Add Picture button from the toolbar.

Next, we will cover how to add categories and document. Click the Add Category button and enter the desired category name in the pop-up window. For this example, let's use PDFs. Then click the Add button and the category will be displayed at the bottom of the section. Note. To delete the document category, select the recycling bin located to the right of the document title.

Lastly, we will learn how to add documents. Locate and click the Add Documents button. In the pop-up window, click on the dropdown under category. And you can choose to add new category or select the category previously created. Note. You can leave the category field as is and the uploaded documents will be added to the default category.

Select release date. And now you can upload documents to be a two methods. Method one. Locate the desired document from your local hard drive and drag and drop files into the blue container area, or, method two, click the browse files button, locate the desired document from your local drive, and click Open. Note. A red warning will be displayed if you try to upload duplicate document. For example, same file name and extension. Confirm you have completed all the above steps and then click the Add button to upload the files into the specified category.

Here are a few final notes regarding documents once they have been uploaded into this section. To reorder documents, click and hold the icon to the left of the title and drag up or down. To download the document, click the title and the information will open in a new tab. Select the Download button at the top of the screen.

To edit document information, select the Edit icon, which is the pencil located next to the recycling bin. Here you can edit the document name, change and/or create new document categories, and select a new release date. To delete a document, select the recycling bin icon on the far right of the document title. The recycling bin icon will be hidden if the respective document is associated with a participation period. Make sure any time you add a new document to the summary site, you republish information for it to populate.

Thank you for watching. If you have any additional questions, please submit a remedy ticket or visit our KRC SharePoint site for additional supporting documentation and videos.