



Alloc8 User Guide

# Document Management

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# Document Management

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## Overview

Alloc8 has made major improvements to the way documents are attached and managed. With these improvements Alloc8 has introduced a document hierarchy structure, the capability to attach files from Google Drive, add links to folders, you also still have the ability to add files from your desktop.

The ability to add documents and images to a job has also been introduced in the Alloc8 mobile app. Now your field workers can attach documents and photos to a job from their mobile or tablet.

You can attach documents to branches, companies, vehicles, assets, and jobs.

## Locating the Document Management area

### Managing documents on branches and companies

For branches and companies, the **Attachments** section is located at the bottom of the **Update Branch** or **Update Company** page.

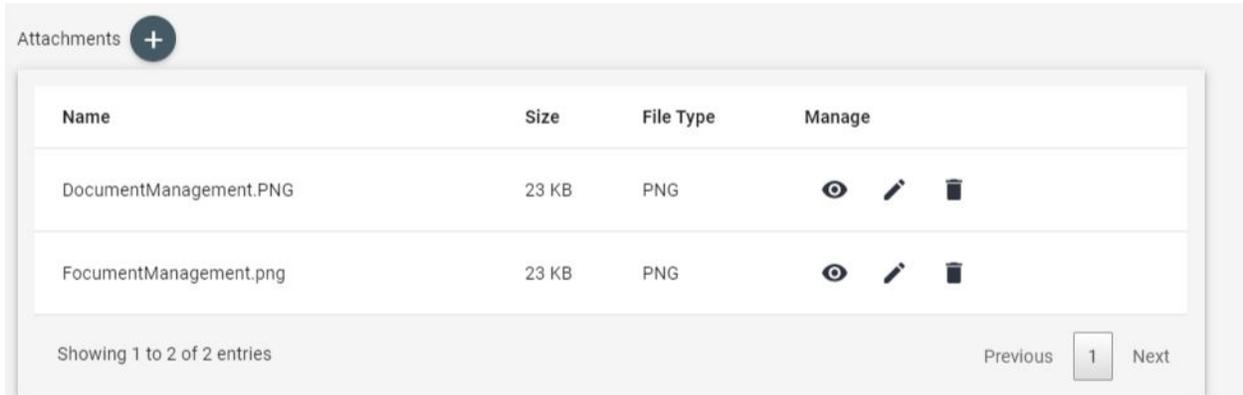


Figure 1. Attachment section in Update Branch / Update Company

### Managing documents on vehicles and assets

For vehicles or assets, go to **View Equipment** and click the **folder** icon on the right hand column of an individual vehicle or asset.



Figure 2. Manage documents for vehicle and assets via the Folder icon on the View Equipment page

### Managing documents on jobs

When a job has been created, users can attach and manage documents on jobs through the following ways:

1. **Forms and Attachments** icon on the **View Jobs** page.



Figure 3. View Jobs attachment icon

2. **Forms and Attachments** icon on the **Whiteboard** and **Resource Whiteboard**

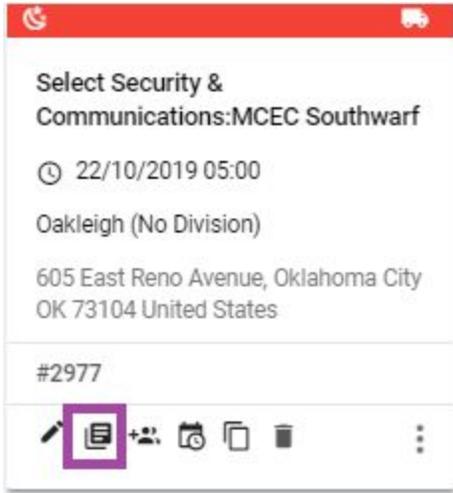


Figure 4. Job card attachment icon

3. Through the **Forms and Attachments** button on pages relevant to the job ie. Update job, Resource Allocation and Timesheet Page.

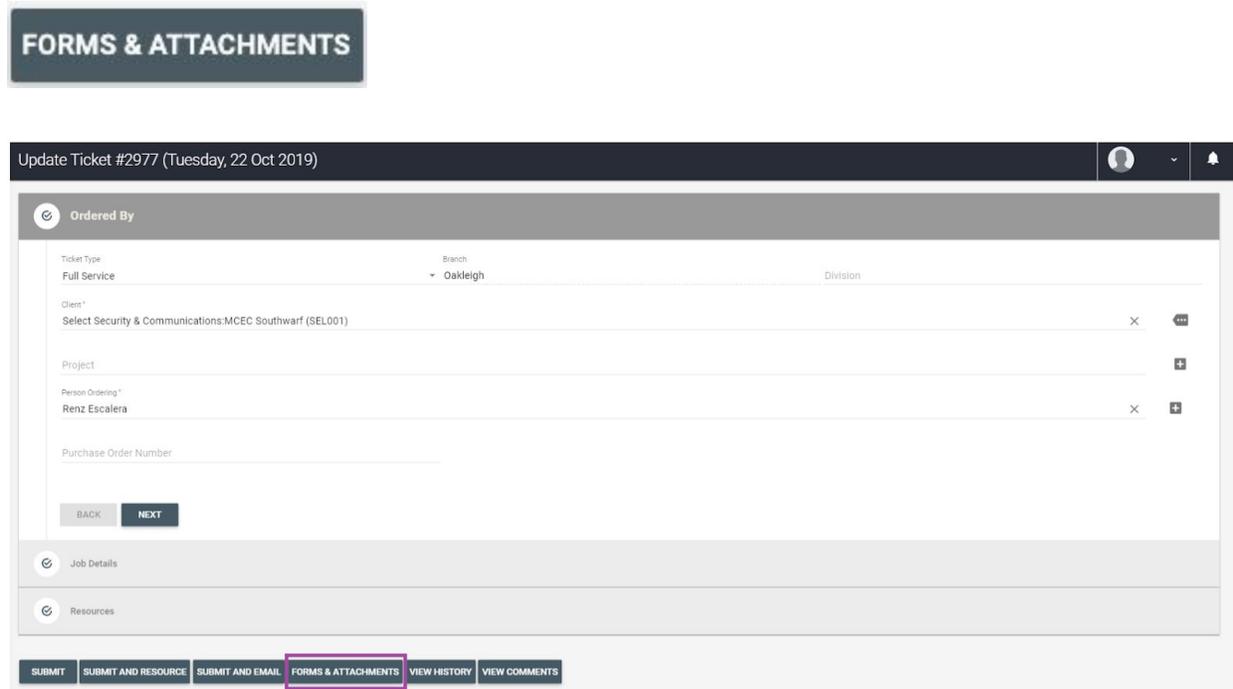


Figure 5. Forms & Attachments button on Update Ticket page

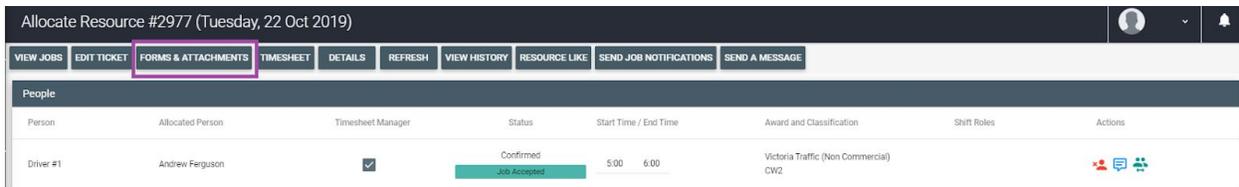


Figure 6. Forms & Attachments button on Allocate Resource page

## Inheritance and hierarchy

### What documents get applied automatically to my job?

Forms that have been attached to the Branch or Company (Client) for that job, and documents for resourced Vehicle or Assets will automatically be applied and will display on the job, in the 'Forms & Attachments' page. The column 'Attachment Level' indicates the area that the document has been applied to.

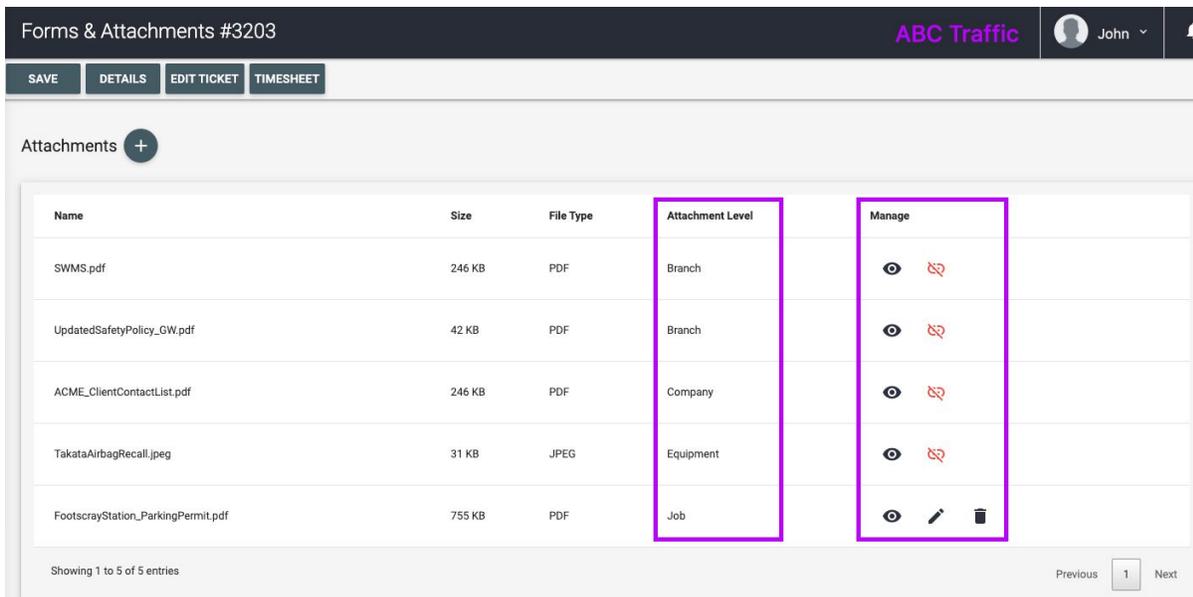


Figure 7. Attachment level and management for inherited documents on jobs

## What order do my attached documents display in?

Documents will be displayed in the Job attachments section in order of the following hierarchy:

### Branch

*All documents that have been uploaded to the branch*

### Company

*All company documents for that client*

### Vehicle or Asset

*All documents uploaded to a particular vehicle or asset resourced on the job*

### Job

*All documents uploaded to the job*

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## How to attach documents

To start attaching documents, simply click the  button from the **Attachments** section of your Branch, Company, Vehicle, Asset or Job.

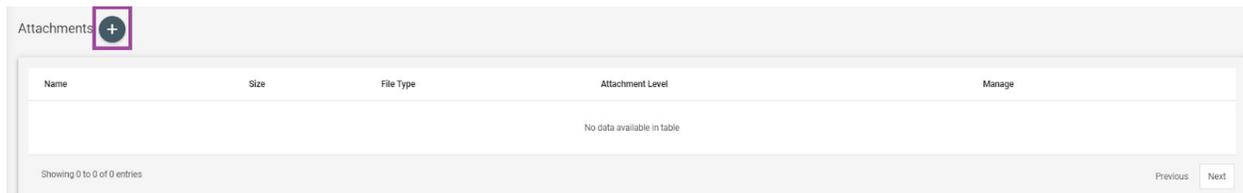


Figure 9. Attachment section in jobs

This will open an **Add Attachment** pop up which allows users to choose from uploading a file from their local computer, inserting a file from Google Drive, or adding a link of a file using a web address.

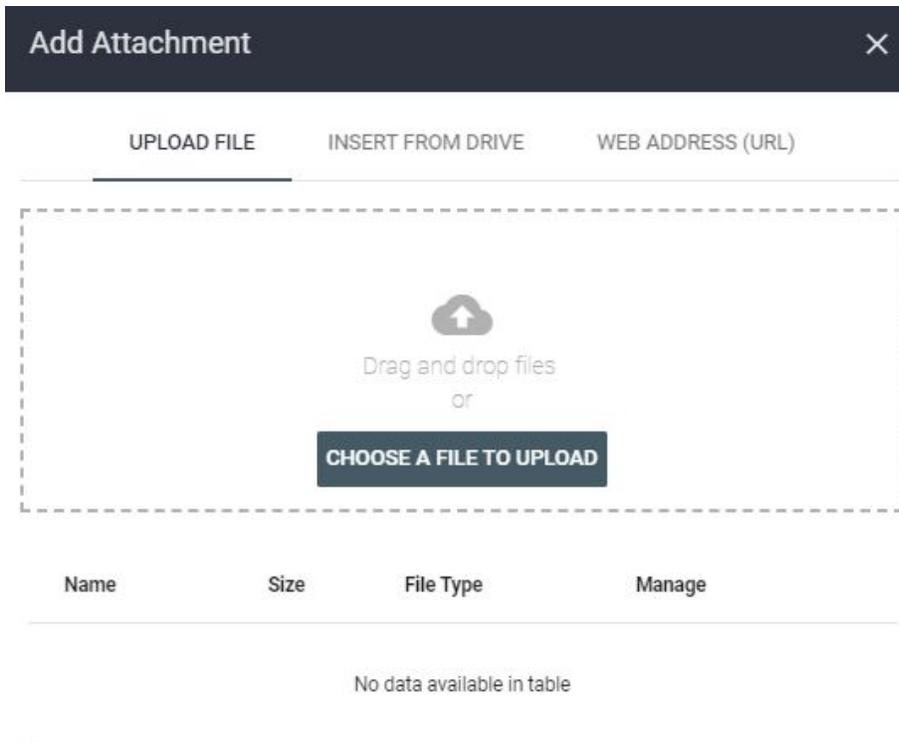


Figure 10. Add Attachment screen

## Upload File

To upload a file from the local computer, simply drag and drop files into the window or click **Choose a File to Upload** button to open your file browser.

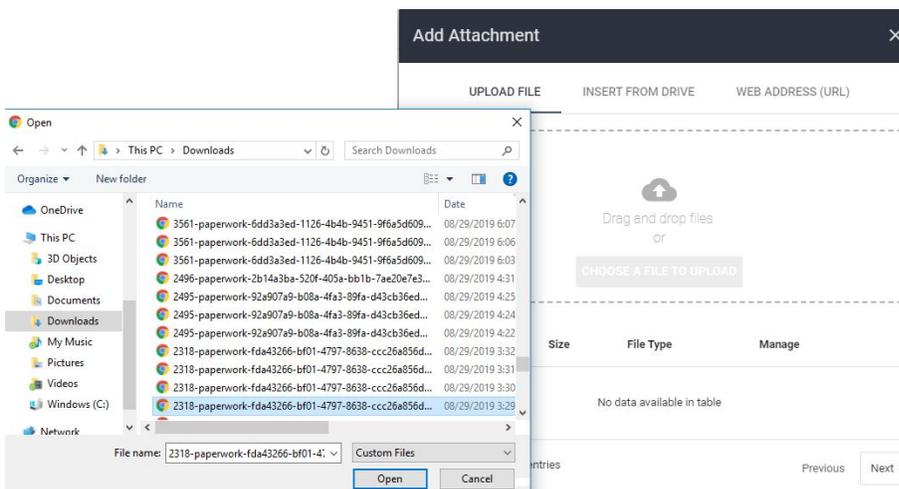


Figure 11. Upload File from your computer

## Insert From Drive

To insert a file from Google Drive, select the **Insert From Drive** tab and click **Google Drive**. This will open the Sign In to Google Accounts window.

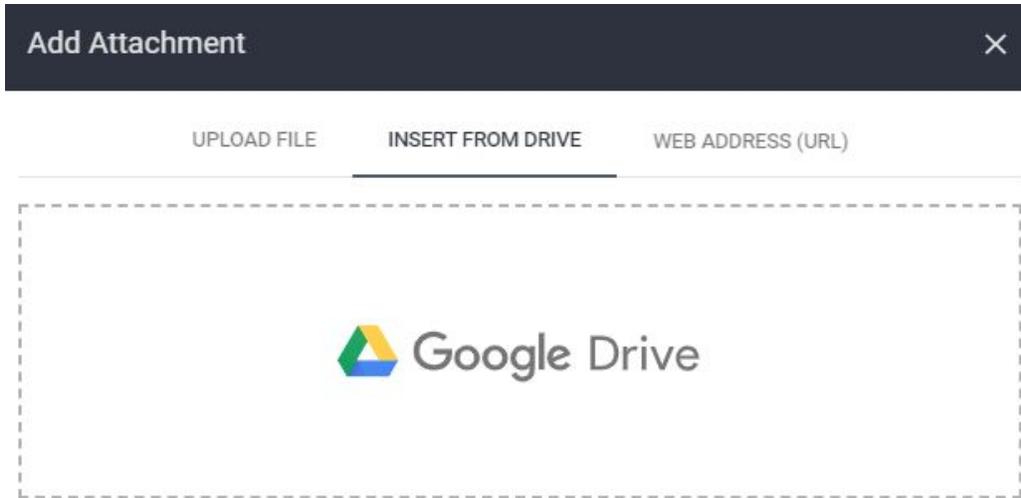
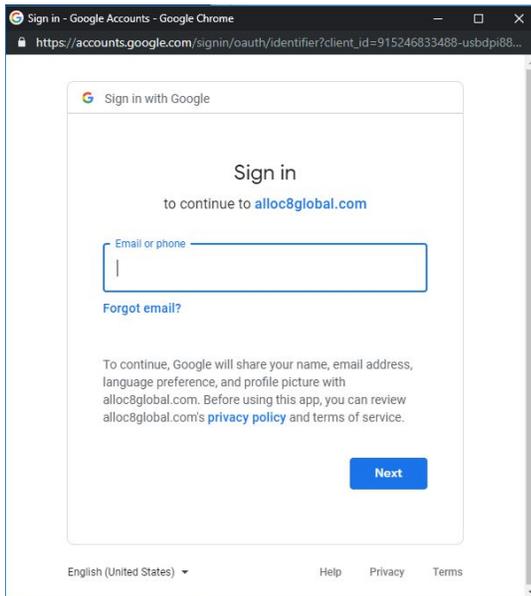


Figure 12. Insert From Drive



You will need to provide your email and password to Google in order to access Google Drive.

Figure 13. Sign-in to Google

Once successfully logged-in to Google, select a file to insert from your Google Drive.

**Note:** Please ensure the sharing settings of your File is set to 'Anyone with the link can view' to allow your field workers to access this file on their device.

## Select a file

X

### Google Drive

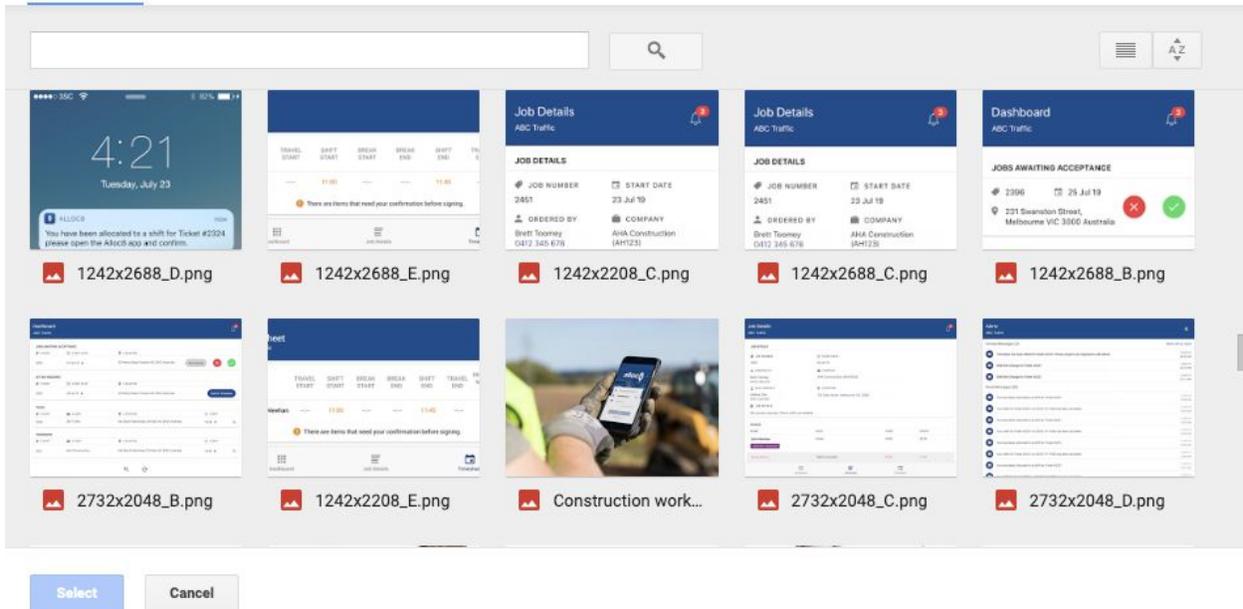


Figure 14. Select a File from Google Drive

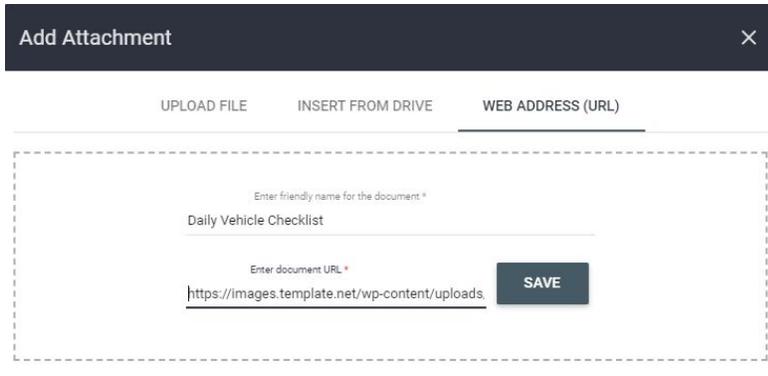
## Link sharing

-  **On - Public on the web**  
Anyone on the Internet can find and access. No sign-in required.
-  **On - Anyone with the link**  
Anyone who has the link can access. No sign-in required.

Figure 15. Sharing Settings in Google Drive

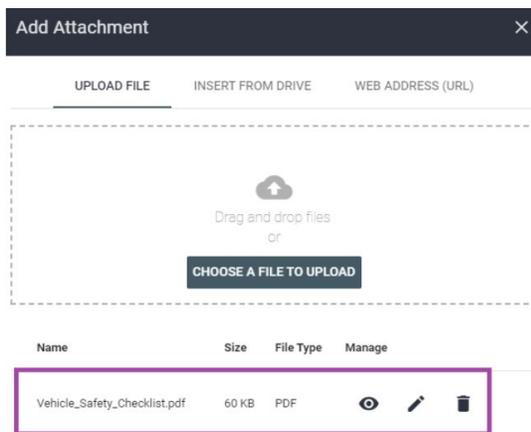
## Add a Link (Web Address or Drive Folder)

To add a link to a file from a web address, users can enter their desired name of the file to be linked and enter the document URL, then click the **Save** button.



The screenshot shows the 'Add Attachment' dialog box with the 'WEB ADDRESS (URL)' tab selected. The form includes a text input field for the document name, a text input field for the document URL, and a 'SAVE' button.

Figure 16. Add a Web Address

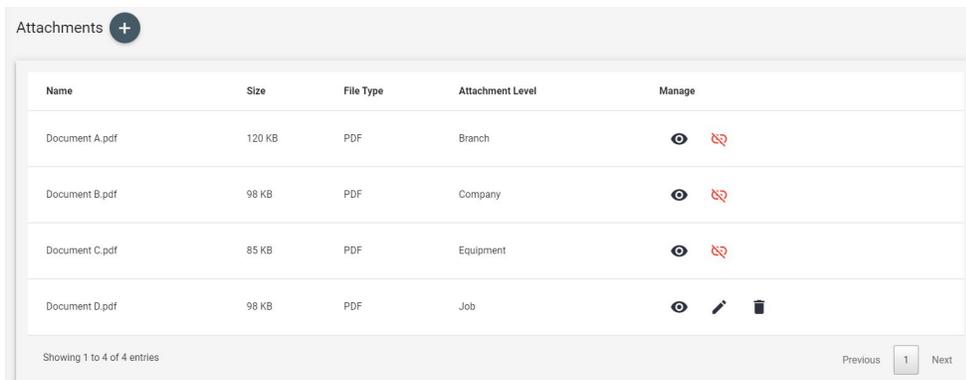


The screenshot shows the 'Add Attachment' dialog box with the 'UPLOAD FILE' tab selected. The form includes a 'Drag and drop files' area with a 'CHOOSE A FILE TO UPLOAD' button. Below the form is a table listing uploaded documents.

Name	Size	File Type	Manage
Vehicle_Safety_Checklist.pdf	60 KB	PDF	  

All of your uploaded documents are then shown at the bottom of this **Add Attachment** pop up, as well as in the **Attachment** section of the page once the pop up is closed.

Figure 17. Add Attachment screen with uploaded document



The screenshot shows the 'Attachments' section with a table of uploaded documents. The table has columns for Name, Size, File Type, Attachment Level, and Manage.

Name	Size	File Type	Attachment Level	Manage
Document A.pdf	120 KB	PDF	Branch	 
Document B.pdf	98 KB	PDF	Company	 
Document C.pdf	85 KB	PDF	Equipment	 
Document D.pdf	98 KB	PDF	Job	  

Showing 1 to 4 of 4 entries

Previous 1 Next

Figure 18. Attachment section with uploaded documents

# Managing documents

## Manage documents on web

You can **view, rename, delete**, an attached document through the **Attachments** section or **Add Attachment** screen.

Form inherited documents on jobs, an 'unlink' icon will display. Clicking this will manually remove that document from the job. This does not affect the document attached at the root level.

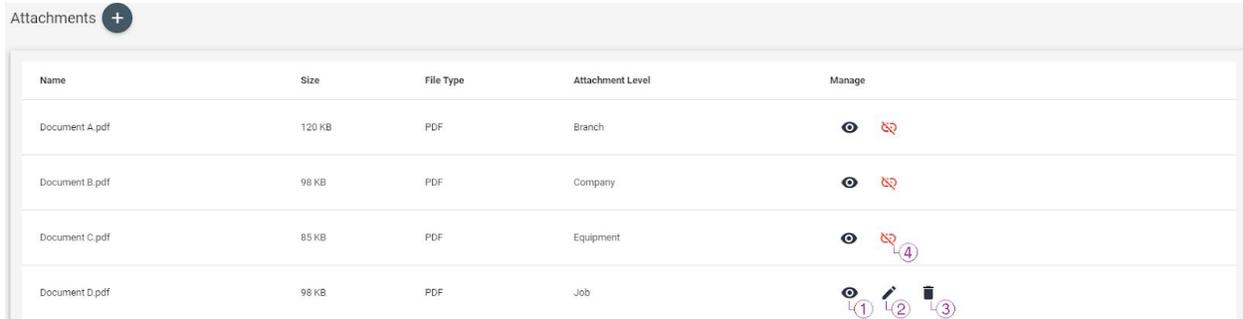


Figure 19. Manage Document icons

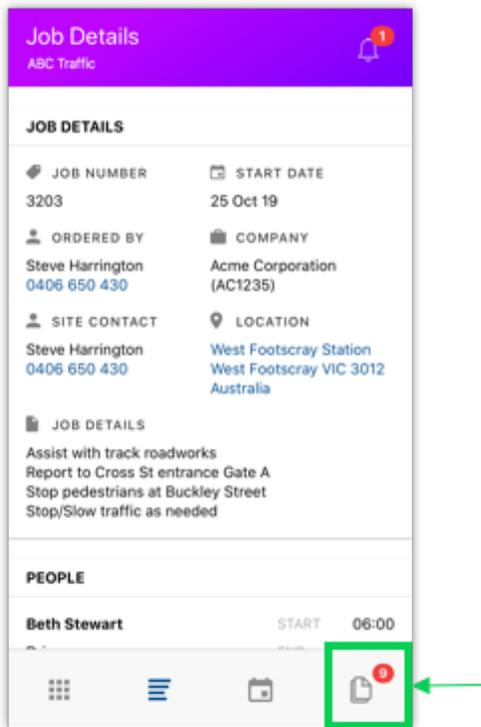
No.	Icon Name	Description
1	View File	Clicking on this icon will let the user view the attached file in a new pop-up window
2	Rename File	Clicking on this icon will let the user rename the attached file
3	Delete File	Clicking on this icon will let the user delete the attached file
4	Unlink File	Clicking on this icon will let the user unlink the attached document from the job. Document at root level is not affected. <i>[Shows on inherited documents on jobs only]</i>

## Manage documents on mobile

Crew members can view the attached documents from web through the Alloc8 App on their mobile or tablet. They can also take a photo, choose from gallery or add a link via the mobile app, and these are synced with the job on the web and included in Paperwork.

Documents and attachments may be added and edited until a Timesheet has been submitted. After a Timesheet has been submitted, the job is considered locked and no further changes can be made to attachments.

### How do I see documents for my job?

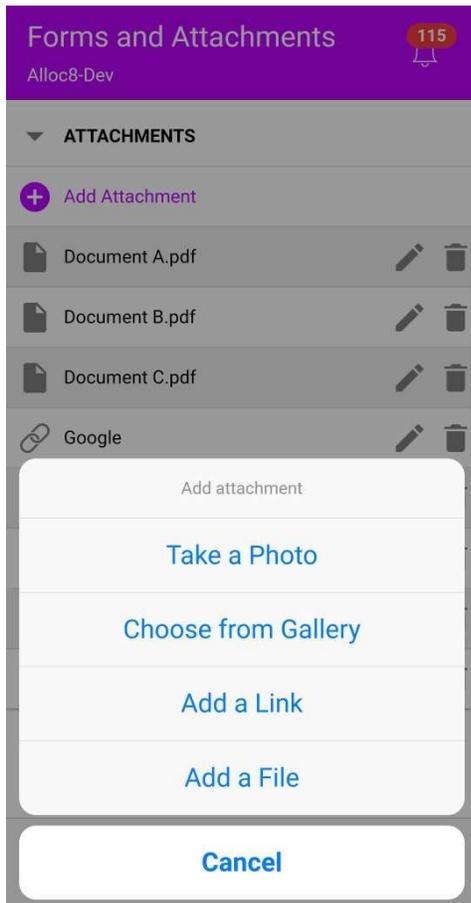


To access and manage all the attached documents of a job in mobile, users can click the **Forms & Attachments** icon located at the bottom of the screen while viewing the job. This will take the user to the **Forms & Attachments** screen.

Figure 20. Forms & Attachments icon in Mobile

## Attaching documents and photos on mobile

To attach a new document to the job, click the  button. You can then choose between taking a photo, selecting from gallery, adding a link (Android users can also add a file from their mobile).

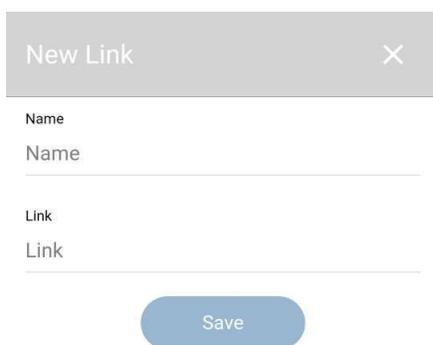


If the user selects **Take a Photo**, their mobile camera will open and any captured photos will be automatically uploaded to the job.

If the user selects **Choose from Gallery**, their mobile gallery will open and they can search and select from the list of photos available.

If the user selects **Add a File**, the file storage on their mobile will open and they can search and select from the list of files available on their device.

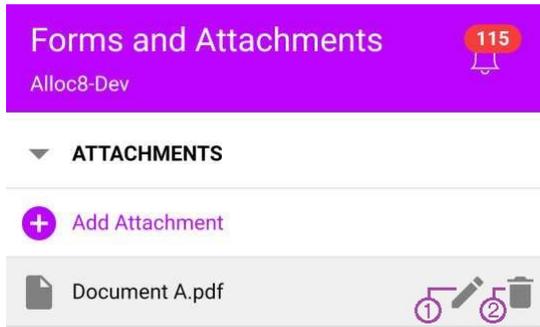
Figure 21. Add Attachment in Mobile



If the user selects **Add a Link**, the **New Link** screen will display and users will be able to enter the name of the file to be linked and enter the document URL, then click the **Save** button.

Figure 22. New Link screen in Mobile

## Managing attached documents



All crew members can view all attachments uploaded to a job. To view the attached document, users can simply click the document name.

Users only have the ability to **rename** or **delete**, an attachment that they have uploaded. Here, an Edit icon and Trash can icon will appear.

Changes made to attachments at a mobile level will also sync to the job on the web.

Figure 23. Manage documents icon in Mobile

No.	Icon	Description
1	Pencil	Clicking on this icon will let the user rename the attached file
2	Trash Can	Clicking on this icon will let the user delete the attached file