

Alloc8 User Guide

# **Document Management**

Last Updated: November 2019

## Document Management

## Contents

Overview	1
Locating the Document Management area	2
Managing documents on branches and companies	2
Managing documents on vehicles and assets	2
Managing documents on jobs	2
Inheritance and hierarchy	4
What documents get applied automatically to my job?	4
What order do my attached documents display in?	5
How to attach documents	5
Upload File	6
Insert From Drive	7
Add a Link (Web Address or Drive Folder)	9
Managing documents on web and mobile	10
Manage documents on web	10
Manage documents on mobile	11
How do I see documents for my job?	11
Attaching documents and photos on mobile	12
Managing attached documents	13

## **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.

Name	Size	File Type	Manage	
DocumentManagement.PNG	23 KB	PNG	• /	Î
FocumentManagement.png	23 KB	PNG	• /	T

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.

U	nique Id 🗘	Item Name 💲	Description 🗘	Assigned to User 💲	Branch 🗘	Divisions 🗘	Status 🗘	Actions
13	234	Arrow Board Trailer	new		Glen Waverley		Active	/ 🗆 🖿

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.

Ticket Number 💲	Ticket Type	Branch 🗘	Division	Company	Site Contact	Start Date And Time 💲	Confirmed	Actions
2253	Full Service	Oakleigh		RMB Property Group Pty Ltd : 33-39 Plenty Rd, Preston	Mark Rivett	01/10/2019 - 12:00	Yes	/ 🖪 😬 🛱 🗇 🔳 😏 🚦

Figure 3. View Jobs attachment icon

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



Figure 4. Job card attachment icon

FORMS & ATTACHMENTS

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

Branch ≁ Oakleigh	Division	
L001)		×
		×
SE	Basch • Oakleigh SEL001)	Brach • Oakleigh Division SEL001)

Figure 5. Forms & Attachments button on Update Ticket page

Alloca	te Resource #	#2977 (Tuesday,	22 Oct 2019)							~ <b>\$</b>
VIEW JOBS	EDIT TICKET FO	RMS & ATTACHMENTS	TIMESHEET DETAILS	REFRESH	VIEW HISTORY RESOURCE LIKE	SEND JOB NOTIFICATION	S SEND A MESSAGE			
People										
Person		Allocated Person	Timeshe	et Manager	Status	Start Time / End Time	Award and Classification	Shift Roles	Actions	
Driver #1		Andrew Ferguson	I	2	Confirmed Job Accepted	5:00 6:00	Victoria Traffic (Non Commercial) CW2		* 🗐 🚔	

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.

Forms & Attachments #3203				AB	C Traffic	John 🖸	~
SAVE DETAILS EDIT TICKET TIMESHEET							
Attachments +							
Name	Size	File Type	Attachment Level	Manage			
SWMS.pdf	246 KB	PDF	Branch	ø	82		
UpdatedSafetyPolicy_GW.pdf	42 KB	PDF	Branch	ø	ଽ୕ୄ		
ACME_ClientContactList.pdf	246 KB	PDF	Company	ø	93		
TakataAirbagRecall.jpeg	31 KB	JPEG	Equipment	0	93		
FootscrayStation_ParkingPermit.pdf	755 KB	PDF	Job	0	/ 1		
Showing 1 to 5 of 5 entries						Previous 1	Next

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

## How to attach documents

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

A	ttachments						
	Name	Size	File Type	Attachment Level	Manage		
				No data available in table			
	Showing 0 to 0 of 0 entries					Previous	Next

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.

LIPLOAD FL	IE IN	SERT FROM DRIVE	WEB ADDRESS (URL)
		SENTINOW DRIVE	WEB ADDITESS (OILE)
		•	
		Drag and drop file:	5
		or	
	CH	IOOSE A FILE TO UPI	OAD
	Size	File Type	Manage
Name			in an a ge

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.

	Ad	ld Attachmen	nt			×
		UPLOAD FIL	LE	INSERT FROM DRIVE	WEB ADDRESS (URL)	
🗊 Open	1	×				
$\leftarrow$ $\rightarrow$ $\checkmark$ $\uparrow$ 🚺 $\rightarrow$ This	PC > Downloads v 🖏 Search Download	s ,p				
Organize 👻 New folder	8	• • •		0		
OneDrive	Name	Date ^		Drag and drop files		
🗦 This PC	3501-paperwork-6dd3a3ed-1126-4b4b-9451-9f6a5d609	08/29/2019 6:07		or		
3D Objects	3561-paperwork-6dd3a3ed-1126-4b4b-9451-9f6a5d609	08/29/2019 6:03				
E Desktop	© 2496-paperwork-2b14a3ba-520f-405a-bb1b-7ae20e7e3	08/29/2019 4:31				
Documents	2495-paperwork-92a907a9-b08a-4fa3-89fa-d43cb36ed	08/29/2019 4:25				
Downloads	2495-paperwork-92a907a9-b08a-4fa3-89fa-d43cb36ed	08/29/2019 4:24				
A My Music	2495-paperwork-92a907a9-b08a-4fa3-89fa-d43cb36ed	08/29/2019 4:22	Cine	File Turne	Manage	
Dicturer	2318-paperwork-fda43266-bf01-4797-8638-ccc26a856d	08/29/2019 3:32	SIZE	File Type	Manage	
Pictures	2318-paperwork-fda43266-bf01-4797-8638-ccc26a856d	08/29/2019 3:31				
de videos	© 2318-paperwork-fda43266-bf01-4797-8638-ccc26a856d	08/29/2019 3:30		No data scattelete to telefe		
Undows (C:)	2318-paperwork-fda43266-bf01-4797-8638-ccc26a856d	08/29/2019 3:29		No data avaliable in table		
🃫 Network 🗸 🗸		>				
File nam	ee: 2318-paperwork-fda43266-bf01-4; V Custom Files	∨ Cancel	ntries		Previous	Next

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

#### Google Drive



Figure 14. Select a File from Google Drive

#### Link sharing



۲

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.

UPLOAD FILE	INSERT FROM DRIVE	WEB ADDRESS (URL)	
Ente	er friendly name for the document *		
Daily Vehicle (	Checklist		
Ente	r document URL *	SAVE	
https://image	s.template.net/wp-content/upl	oads, SAVE	

Figure 16. Add a Web Address

UPLOAD FILE	INSERT FRO	M DRIVE	WEB AD	DRESS (	URL)
		-			
	Drag an	d drop files			
		or			
1	CHOOSE A F	OF	AD		
	CHOOSE A F	or File to uplo	AD		
Vame	CHOOSE A F	or FILE TO UPLO File Type	Manage		

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

achments 🕂							
Name	Size	File Type	Attachment Level	Manage			
Document A.pdf	120 KB	PDF	Branch	Ø	62		
Document B.pdf	98 KB	PDF	Company	Ø	82		
Document C.pdf	85 KB	PDF	Equipment	ø	63		
Document D.pdf	98 KB	PDF	Job	0	1	Î	
Showing 1 to 4 of 4 entries							Previous 1

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.

Atta	achments +				
	Name	Size	File Type	Attachment Level	Manage
	Document A.pdf	120 KB	PDF	Branch	<b>⊘ ⊗</b>
	Document B.pdf	98 KB	PDF	Company	<b>⊙</b> <sup>6</sup> 2
	Document C.pdf	85 KB	PDF	Equipment	• <u></u>
	Document D.pdf	98 KB	PDF	Job	

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. [Shows on inherited documents on jobs only]

## 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).

Forms and Attachments			
▼ ATTACHMENTS			
Add Attachment			
Document A.pdf	/ 1		
Document B.pdf	/ 1		
Document C.pdf	/ 1		
🔗 Google	/ 1		
Add attachment	-		
Take a Photo			
Choose from Gallery			
Add a Link			
Add a File			
Cancel			

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

Forms and Attachments Alloc8-Dev	<mark>115</mark> 堤
▼ ATTACHMENTS	
+ Add Attachment	
Document A.pdf	510

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.	lcon	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