



Alloc8 User Guide

# Paperwork

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# Paperwork

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## Overview

Alloc8 now bundles your job docket, timesheet and job attachments into an online PDF that is sent to the site contact, as part of your invoices and can be downloaded from the job at any time by your web users.

### What gets included in Paperwork?

The following items are automatically bundled as paperwork in the following order:

#### **Job docket**

#### **Timesheet**

**Images** All images uploaded to a job on both web and mobile, including caption name, date and timestamp

**Submitted forms** Submitted forms that have been set to 'include in Paperwork'. This will be introduced as part of the upcoming Custom Forms feature

**Job documents** All other PDF documents uploaded to the job

## How it works

Paperwork is generated upon Timesheet is submission, on web or mobile.

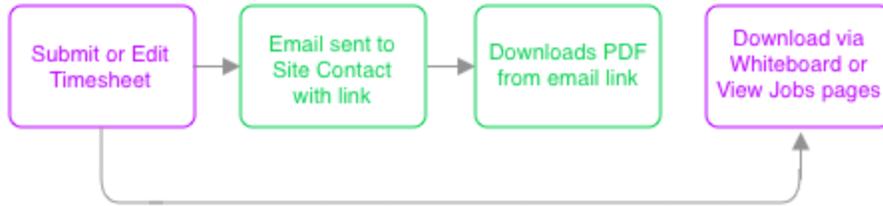


Fig 1. Paperwork workflow

## Sending Paperwork to Site Contact

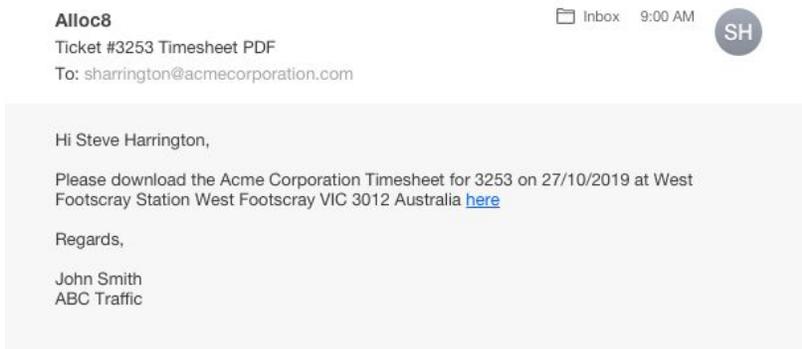


Fig 2. Site contact email

Upon Timesheet submission, paperwork is emailed to the site contact on the job as a link that they can download, as some paperwork bundles may have a large file size.

If a new Timesheet is submitted, the paperwork PDF is regenerated and sent again.

## Downloading Paperwork from Alloc8 Web

Paperwork can be downloaded from the 'Jobs' section in Alloc8:

### Whiteboard and Resource Whiteboard

Click on the three dots and select 'Download Paperwork'

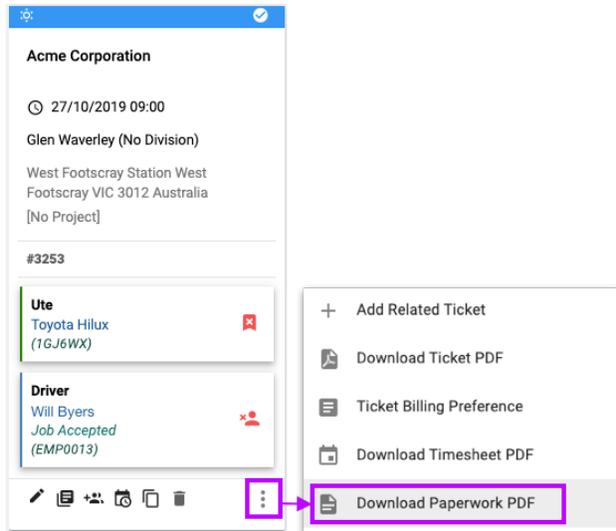


Fig 3. Download Paperwork from Whiteboard pages

## View Jobs page

Click on these same three dots and select 'Download Paperwork'



Fig 4. Download Paperwork from View Jobs page

**Note:** 'Download Paperwork' previously downloaded the Timesheet PDF. If you need to download the individual timesheet, there is a new tab called *Download Timesheet PDF* within this same menu.

## Paperwork in invoices

When an invoice is generated, the invoice will be bundled with this same Paperwork PDF and the generated invoice as the first page.

## FAQ

### **Can I include Company or Branch documents in Paperwork?**

In this first release only documents attached at a job level are included in Paperwork. However, coming soon is the *Paperwork Override* feature that introduces the ability to add or exclude any document attached at any level from Paperwork.

### **Can I control what is included in Paperwork, and what isn't?**

The *Paperwork Override* feature will also include the ability to override paperwork inclusions for any document on a job.

### **What if I need to attach a new image or document to a job to be included in Paperwork after a Timesheet is submitted?**

You can add, edit and remove attachments from a job. These will be included in Paperwork and will be available from the link in the original email to the Site Contact as well as the 'Download Paperwork' tab for that job on the Resource Whiteboard. If you want to resend the Paperwork to the Site Contact, you can either resubmit the Timesheet or download and send it manually.

### **The Paperwork PDF is not downloading or updating for a job**

It can take up to 10 minutes for the Paperwork to update for a job. If you are unable to download paperwork or your paperwork is displaying an older version, please wait a few minutes before trying again.