

Documents Overview

Documents and photos can be uploaded against sites, jobs, assets, and resources. In addition, you can create document tags to help categorise and organise documents.

The *Documents* page displays a list of documents available. You can upload documents in this area by selecting *Upload* and then select the file you wish to upload:

When uploading a new document to the system you can set an expiry date and set email notifications to be sent to a Team or a specific User or Resource.

The screenshot shows the 'Upload Documents' interface. At the top is an orange header with the title 'Upload Documents' and a close button. Below the header are two main columns of form fields. The left column contains: 'Description:' with a text input; 'Visibility' with a dropdown menu set to 'Public'; 'Document Tags' with a text input; 'Expiry Date' with a dropdown menu set to 'Yes'; and 'Send Email notification' with a text input and 'days before expiry'. The right column contains: 'Expiry Date' with a date picker; 'Email Team' with a dropdown menu set to '(Please Select)'; 'Email Recipients' with a text area; and two buttons: 'Select User' and 'Select Resource'. Red arrows point to the 'Expiry Date' dropdown in the left column, the 'Expiry Date' date picker in the right column, the 'Email Team' dropdown in the right column, and the 'Email Recipients' text area in the right column. Below the form fields is a 'SELECT' button. Underneath is a list of uploaded files, showing one file: 'General Maintenance Report (8).pdf' (1.07 MB). At the bottom right of the list are 'CLEAR' and 'UPLOAD' buttons. At the very bottom is a large grey area with the text 'Drag and Drop Files Here' and '(Max 10 Files & Max FileSize 20mb)'.

The List can also be filtered using the below filters.

The screenshot shows a document management interface with the following elements:

- Document Tags:** A text input field.
- Contract:** A dropdown menu with the selected option "<Contract>".
- Site:** A dropdown menu with the selected option "<Sites>".
- Resource:** A dropdown menu with the selected option "<Resources>".
- Job Number:** A text input field.
- Location:** A dropdown menu with the selected option "<Locations>".
- Sub Location:** A dropdown menu with the selected option "<Sub Locations>".
- Regions:** A dropdown menu with the selected option "<All Regions>".
- Site Type:** A dropdown menu with the selected option "<Site Types>".
- Buttons:** A blue "Q More" button, a green "Upload" button, and a three-dot menu icon.

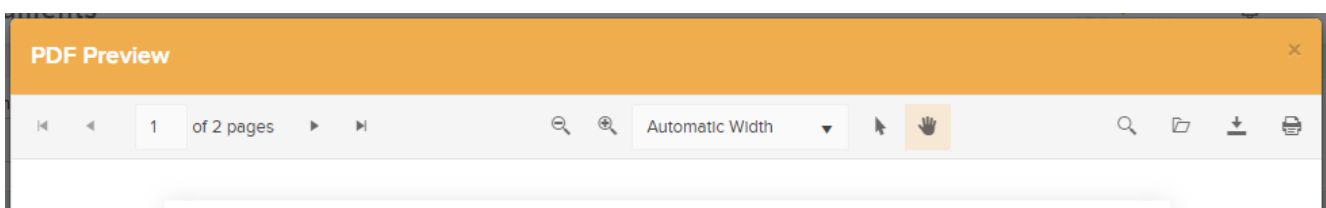
Selecting the three dots beside the *Upload* button will display additional options:

- **Document Tags** – This will reveal a pop up where you can create tags.
- **Excel Export** – This will allow you to export the documents list to an Excel sheet.
- **View Archive** – This will display all documents that have been archived.
 - When viewing the archived documents, the above option changes to “View Live” which will show all live documents.

To archive a document, select the archive icon.

The first icon allows you to download the file, the second icon allows you to send the file via email, and the third icon will allow you edit the file name and description. The magnifying glass icon allows you to preview the image / signature.

If the file is a PDF document, when you click the magnifying glass icon you will be brought to the PDF Preview pop-up where you can view, download or print the document.



You can also add tags to documents in order to help categorise

them further by selecting this icon under the Tags column:

Selecting this will display a pop-up window with a list of all current document tags. From here you can select an existing tag, or create a new tag by selecting the *Add Document Tag* button. Clicking this will create a new row in the list allowing you to name the new tag. You can also edit or delete tags from this window:

Tag Name	Date Created	Created By	Tag Type		
PPM Certificate	19/05/2021	Facilities1	Planned Certific...	EDIT	DELETE
Darren	12/03/2020	Facilities1		EDIT	DELETE
Fire Alarm	01/10/2018	Facilities1		EDIT	DELETE
Asbestos	19/04/2018	Facilities1	Planned Certific...	EDIT	DELETE
Cert	07/03/2018	Facilities1		EDIT	DELETE
Manual	05/03/2018	Facilities1		EDIT	DELETE
RA	11/01/2018	Facilities1		EDIT	DELETE

Document Tags and PPM Certificates – This can be enabled so that a Planned Job cannot be completed by the Contractor until a document is uploaded with the Tag ‘PPM Cert’ attached to it.

1. In the document manager click on ‘Document Tags’ and create a new tag – example PPM Cert and set the Tag Type to Planned Certificate.

Document Tags				
Tag Name	Date Created	Created By	Tag Type	
PPM Cert	16/09/2021	markdemo2	Planned Certific...	<input type="button" value="EDIT"/> <input type="button" value="DELETE"/>

2. When creating or updating a Planned Schedule we now have a new setting '*Planned Certificate must be uploaded before completion*' This can be set to ensure that a document with tag type Planned Certificate is attached to the planned jobs from the schedule before completing them.

3. This can also be set up, if you require a Report for reactive Jobs also. For each Resource/Contractor there is a setting – '*Resource Report Required for Reactive Jobs*' .

You can attach the document to certain Jobs and / or Sites by selecting the icon, under the Job No. or Site columns:

This will load the jobs / sites available and you can select the appropriate job / site. This will then be displayed on the *Documents* list.

You have the option to change the status of the document to *Public* or *Private* and can toggle between the two by selecting *change* on the document you wish to modify.