dokify

Quick Guide

How to use dokify

Índice

![dokify logo]

Chapter 1: How to use dokify

Introduction

There are a series of simple, basic processes that you will repeat often when using dokify. Please bear in mind that, depending on the role that your user has been assigned, there may be certain actions that you are unable to carry out.

The first thing to take into account when navigating dokify is that all the data appearing on your screen refer to the element you are currently dealing with i.e. the options in the left-hand menu always relate to the element that you have accessed. By "element", we mean employees, machines and companies, among other things.

Apart from the options in the left-hand menu, there are also other options located at the top, next to the name of the element you are viewing. These are grouped in the button ⌄ , among other things. Within this option, you can check and modify all the element information.

Example
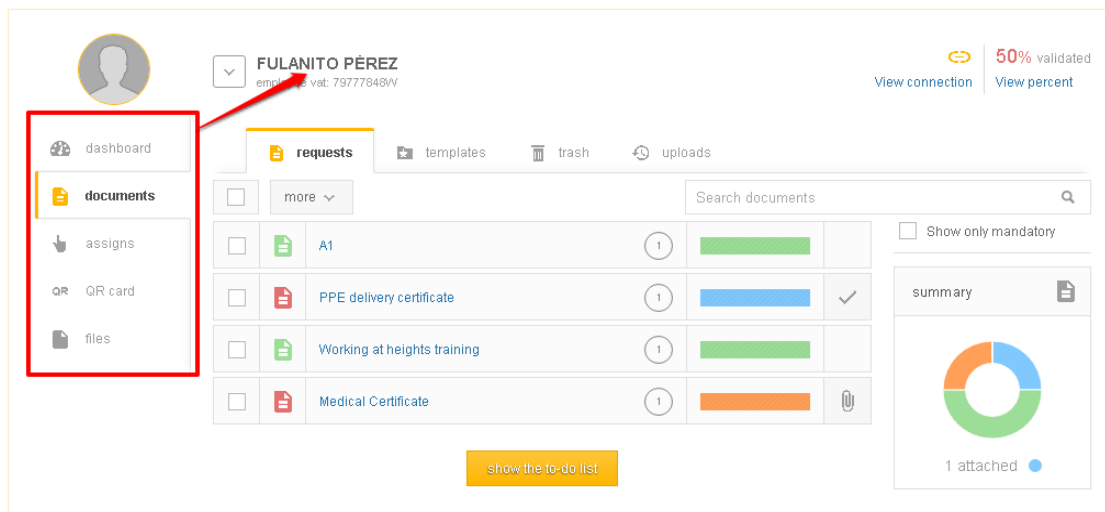
In the previous image, you can see a left-hand menu with the options available to you for the element Fulanito Pérez. In the example, you have selected the document option from the left-hand menu, so you are viewing the Fulanito Pérez documents. If you navigate to other elements, this menu may change according to the type of element you access.

Processes

Imputing

From dokify, you can input or register users, companies, employees, machines, organisations, groups, and requirements. The process is always the same: from any of the modules, you have the option ➕ add new on the right-hand part of the top menu tab.

The form that appears will be different depending on the element that you are creating. Before saving, you must at least complete the obligatory fields in each form. Upon saving, dokify will highlight the obligatory fields that you have not completed, or the fields that you have completed incorrectly. You will not be able to save whilst there are errors.

New user. Use this form to register users that access dokify.

New company. Use this form to invite companies to use dokify. If you wish to invite a large number of companies all at once, you can use the link at the bottom.

New employee. Select the correct country for the employee so that dokify can verify the data correctly.

New machine. Use this form to add a machine.

New organiser. Use this form to add a new organizer

**New group**. Create this element within an organiser.

Assigninig

With the **"assigns"** option, you decide which clients you wish to assign to your elements (companies, employees and machines) so that clients may view these or not. Also, for each client, you decide which groups you wish to assign to your elements.

Both actions are the reasoning used by dokify to know which documents should be requested from which elements. Based on the assigns given to the elements, the corresponding documents will be requested from them.

It is important to assigns properly. To do so, go into the **"assigns"** options located in the left-hand menu of the element you wish to configure.

Assigninig clients

Once you are in the assigns screen, click on ⬚ Configure clients and dokify will display a window where you can select the client companies for whom you work, who will be able to see the element.
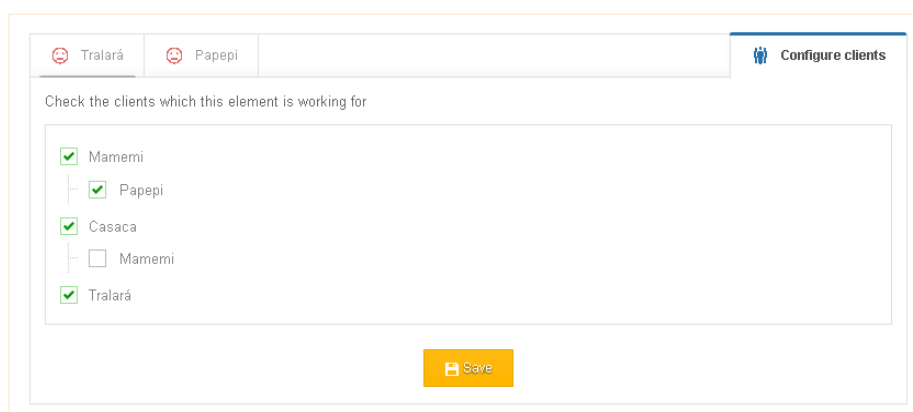
Please bear in mind your clients' contractual relationships. It may be that you work directly for a company but that you also work for that same company in an indirect fashion i.e. another company has hired you to do work for one of your own clients. In this case, dokify will show you all the possibilities and cross-relationships in the emerging window.

Example

You work for several clients. One of your contractors, Casa Blanca, is going to do work for one of them, but not for all of them. To assign Casa Blanca to a client, go to view the company Casa Blanca and click on the option **"assigns"** in the left-hand menu. Once you are in this screen, click on "Configure clients" and dokify will display a window where you will have the option to select all client companies for whom your contractor will work.

From this moment, only the clients you indicated will see your Casa Blanca contractor.

Remember, the fact that a client company is assigned to an employee does not mean that the client company can modify the employee data.

Assigning groups

Once the client companies are assigned to the element, you now have to assign the groups of each organiser that correspond to each of the client companies. To do so:

Step 1: Select the client company where you wish to make the group assigns.
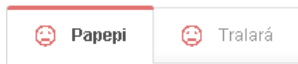
Step 2: As soon as you access each of the organisers, the first thing you will see are the groups that you have already assigned. Click to display the list of groups available to assign.
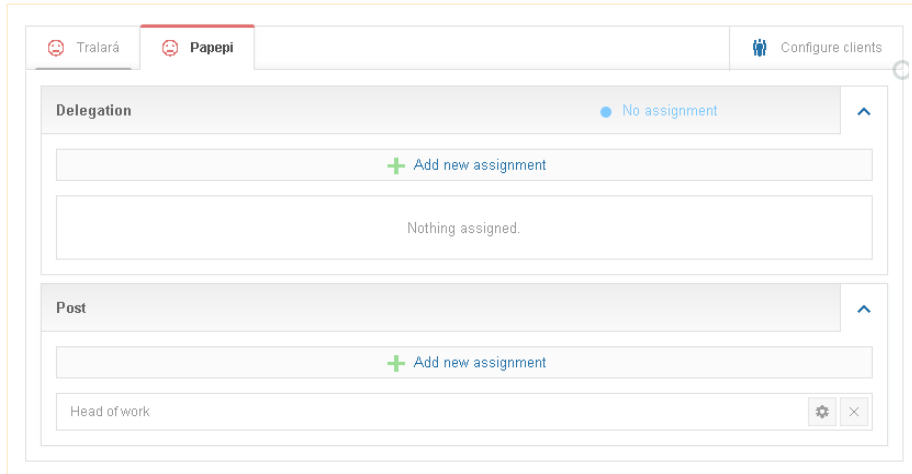
Step 3: Select all the groups in the list that you wish to assign to the element.
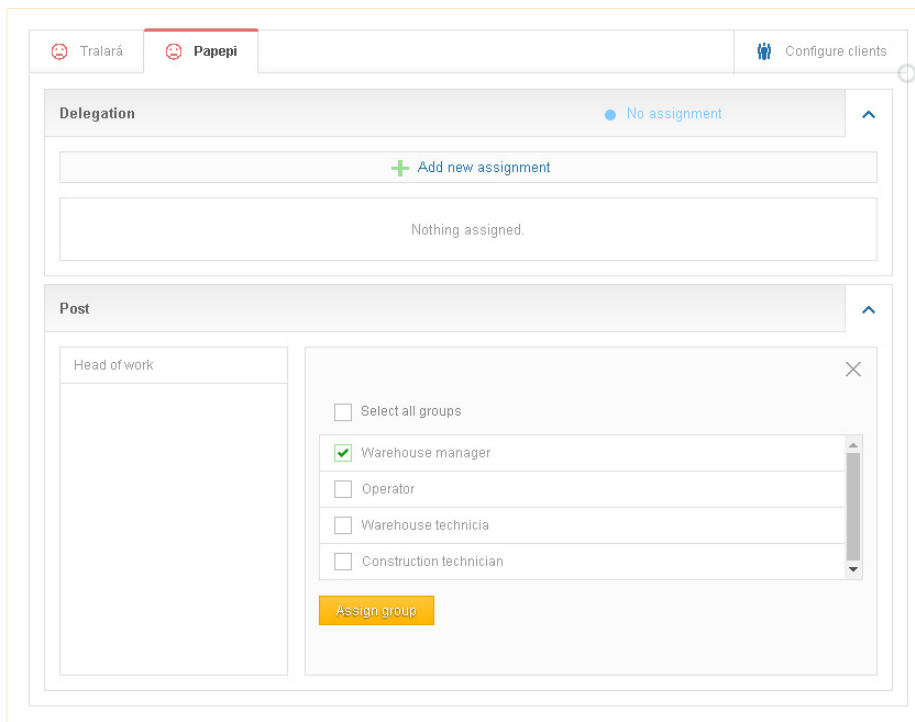
Step 4: When you have selected all the groups that you wish to assign to the element, click on the button

In some organisers, you will be able to see the icon , this means that this organiser is read-only; you cannot assign any group, only consult it.

Example

The company *Laleli* wants to configure its employee *Vanesa Vicalt*. To do so, *Laleli* must bear in mind that she works as a *Warehouse Manager* in addition to working at the *Asturias Office*.

In this example, *Warehouse Manager* and *Asturias* are the groups that must be assigned to the employee *Vanesa Vicalt*.
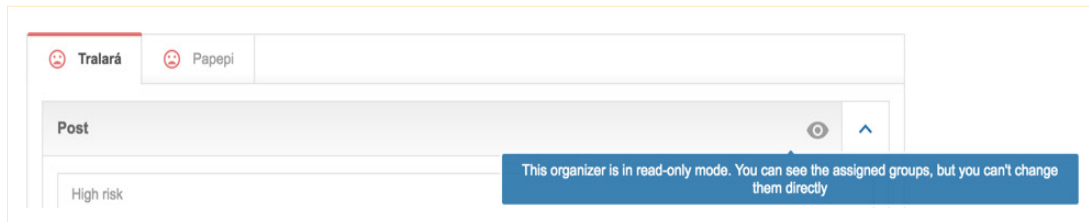
These assigns will become requirements for this employee.

Ultimately, you must consider which assigns you will make for your companies, employees and machines in order for the corresponding or relevant requirements to be requested from them.

Attaching

It is fairly certain that you will repeat this action many times when using dokify. For each element, you will attach the documents required of you.

As always, go to the element to which you wish to attach the documents and click on the **"documents"** option in the left-hand menu.

Next, dokify will display the list of documents corresponding to this element, and their status. To attach the requested documents, click on the document that you wish to attach and click **"Attach"**. This option is located in the menu at the top.

Step 1: Attach the file you want to upload. Here you can find the validation criteria of each client where it is indicated the requirements the document must accomplish in order to be valid for the client.

Step 2: dokify shows a list of companies that requieres the document. Click on the check box of the client the document will be uploaded and then click on the button **Next**

Step 3: Select the document date and click again in the button [Next] . It's very importan to confirm the date, If you don't do it, you won't be able to attach the file. keep in mind that the system uses this date to calculate the document expiry date.

Step 4: This is the last step, here you can see all the data of the requirement you're attaching and also, optionally, you can include a comment to clarify anything about the document you're attanching. To complete the process click on [Finish] and dokify will show you an informative window to indicate the expiry date of the requirement and the maximum and estimated validation time. If the validation is not done by dokify the estimated and maximum validation time as well as the urgent validation option won't be shown.

Nota: Remember that at this point, your document has already been attached.
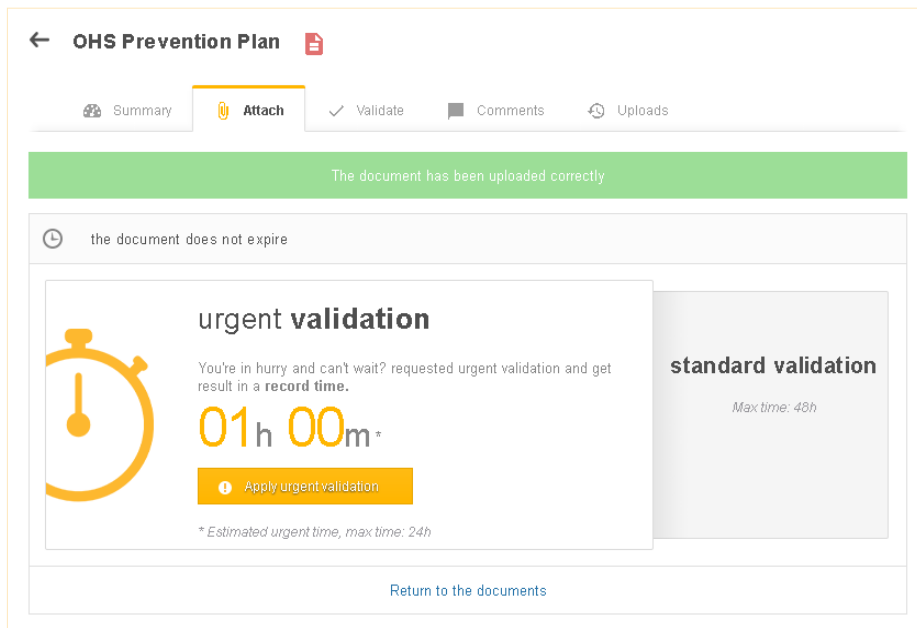
If you would like your requirement to be validated in less time than the standard validation time, click on [**⊕ Apply urgent validation**]. This service is subject to an additional cost, which you always will be informed about before confirming.

Once all your documents have been attached, please wait for dokify or the company requesting them to validate them. Please note that until this happens, your company is not valid.
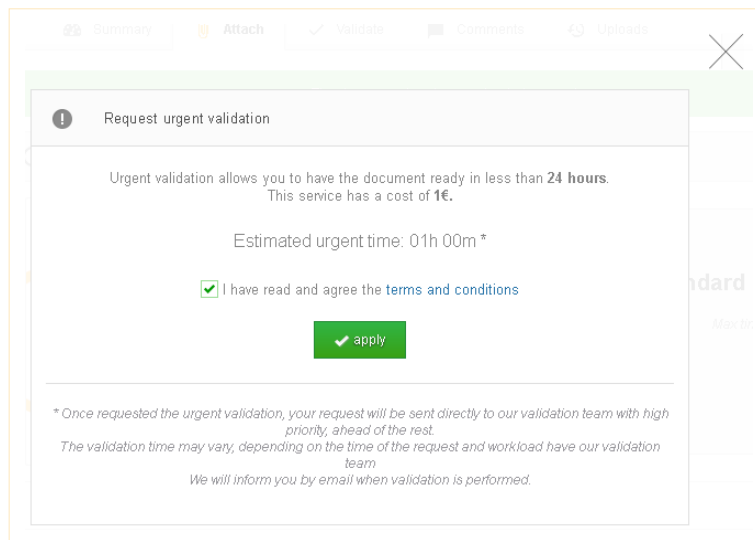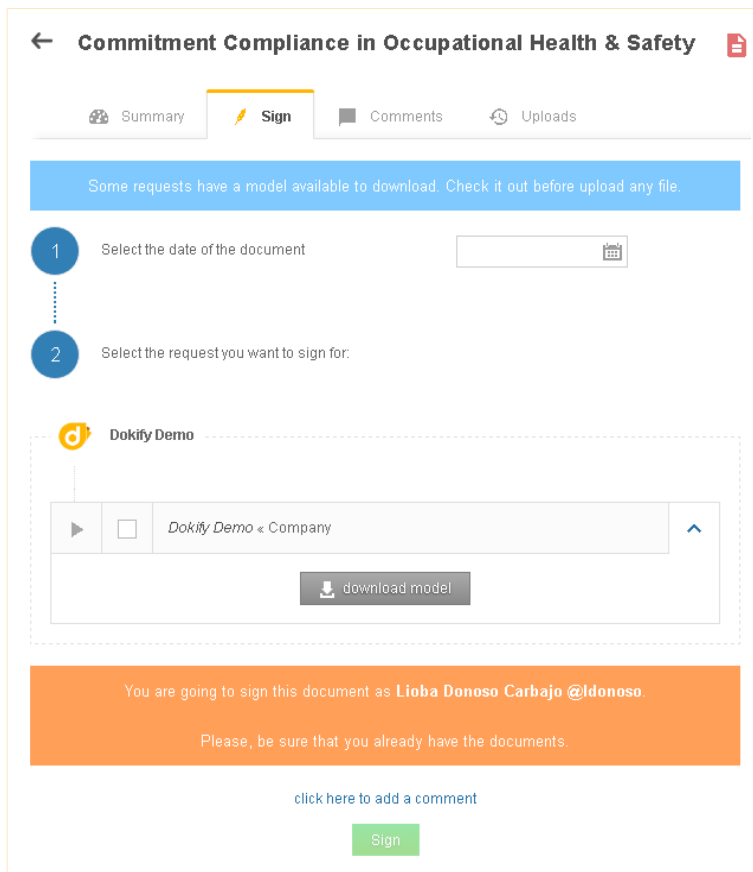
Signing

Signing documents allows you to save time when validating documentation. If you have documents pending, which have been configured for signing, you will see the option **"Sign"** on the top menu, when accessing the document you wish to sign.

These documents only require a signature to validate that they are correct (for example, a delivery receipt for PPEs). This replaces the usual process of downloading, printing, signing, scanning, attaching and waiting for validation by a simple click of the button [Sign]

By clicking on the option **"Sign"**, a window will be displayed:

Download the document by clicking on [download model] and check that it is correct. The document you are downloading is the one that you are going to sign, and it will have your data on it. To conclude the signing process, click on [Sign]. If the requirement needs you to introduce a piece of data, a corresponding window will appear for you to complete.

Nota: This option is only available on the Premium plan.

Validating/Rejecting

The attached documents must be verified i.e. dokify or the company requesting them must check that they are correct and therefore validate them.

Correct documents are validated and incorrect documents are rejected. Upon rejecting a requirement, the dokify notification mechanism is activated to notify the relevant party that the requirement has been rejected. When a document is rejected, it is possible to give a reason in order to help resolve errors and attach the correct document.

As is logical, the company requesting the documents is in charge of validating or rejecting them.

Once all your elements and company documents are validated, your company will be given the ok and will appear in green.

Trash

In dokify, you cannot delete an element for good, but you can send it to the trash. When sending elements to the trash, you will stop seeing them. It is effectively as if you have deleted them, with the advantage of being able to recover them if need be.

To send an element to the trash, go to view the element, display the options located on the button [∨] and select "Send to trash".

Checkin

The Checkin is the process an employee gets in your workplace. In order to carry on this process it's absolutely necessary to be part of if. To do so, you must follow these steps:

Step 1: Get in the dashboard of the employee that wants to access to your workplace and click on the button [Register access], on the right side of the dashboard.

Step 2: In some cases, the employee that wants to get in works for different companies. If it's the case, dokify shows you a list of companies the employee works for. Click on the button [Use this one] of the company the employee it's going to perform the work for.
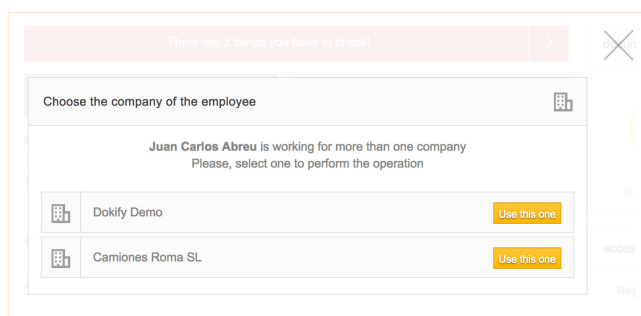
Step 3: If the employee has all of the documents OK, dokify allows the access to your workplace.

If the employee does not have all the documents ok, dokify would deny the access to your workplace.
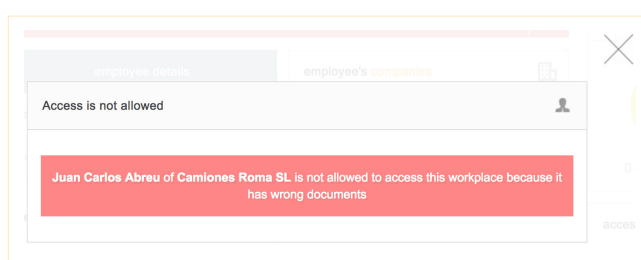
If for some reason, the employee to access is forbidden for company, the access will be denied.
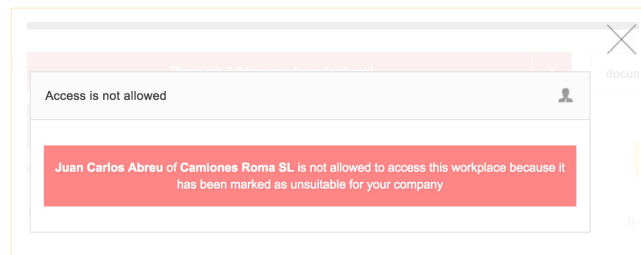
Checkout

The Check-out is the process an employee gets out from your workplace. It's an easy and simple process.

Get in the dashboard of the employee that wants to get out of the workplace and click on the button [Register exit].

Modules

Home

The homepage or dashboard contains all your company information and direct access to all your available options. It also displays a rapid summary of your document status and your elements.

Click on the icon ⚙, situated next to the name of your company and go to "My company". Here, you will be able to consult or modify all the data relating to your company (consult users, organisations, invoices, etc.).

Users

From "my company", click on the option "users". From here, you can manage your company users. You will be able to create new users, modify data for those you already have, send

them to the trash, view assigns, etc.

Companies

Go to the module "company" to manage your contracts via the option "company" in the left-hand menu. You will be able to invite companies who work for you to use dokify, make assigns, send contractors to the trash, and more options available from each company.
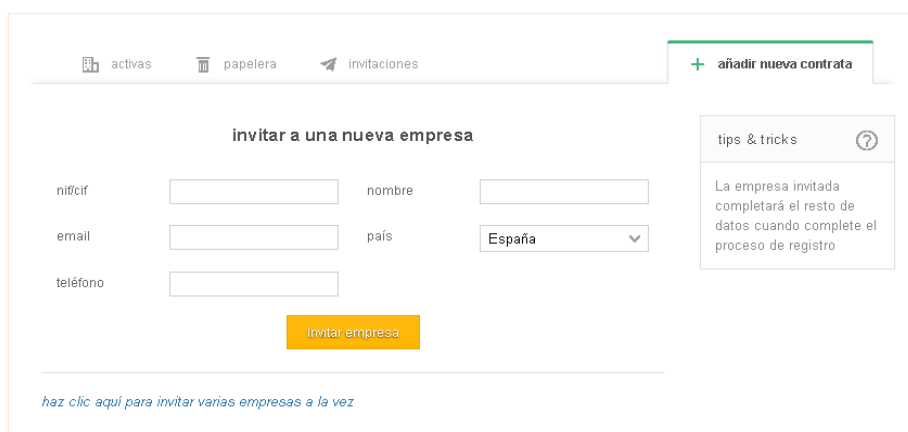
It is important that you remember to assign to your companies the corresponding client companies, so that client companies can view these on their list of companies.

Invitation system

This system allows a company to ask its contractors to use dokify.

Inviting

To create an invitation or to invite a company to use dokify, which is the same thing, access the option "company" in the left-hand menu and click ➕ add new contract . Complete the form that appears, entering the CIF (Tax Identification Number) of the company you are inviting, a contact name, an email address (which is where the invitation will be sent), and the relevant country. dokify will corroborate the data and confirm that the CIF is valid.

Before accepting the invitation

You can control your pending invitations from the tab **"invitations"** within the option **"companies"** in the left-hand menu.

From **"invitations"**, you have access to pending invitations and their status. By going into each one, you will see more options. You can always send the invitation again or discard it to cancel it.

Please note that invitations have a 20-day validity period. After this time, if the invited company does not respond, the invitation will expire.

Furthermore, you can only make one single invitation via email. That is to say, it is only possible to have one single invitation pending via email. Moreover, if an invitation has already been accepted from a particular email address, you will not be able to create a new invitation for this same email address. These restrictions are set by company i.e. many invitations from many companies can be sent to a single email address, but multiple invitations from one company are not permitted.

Accepting an invitation

The company invited will receive an email containing a link to start the registration process via a wizard. Following five easy steps, the company will sign up. From that moment, it will appear on your list of companies.

The link is valid for 20 days. If you try to access it after this time, you will not be able to register and you will be informed that the invitation has expired.

Employees

Go to the module **"employees"** to organise all the information relating to your employees, via the option "employees" in the left-hand menu. As with previous modules, you will be able to input new employees, send them to the trash, or use other options available from each employee element.

Machines

Go to the module **"machines"** to organise all the information relating to your machines via the option "machines" in the left-hand menu. You will also be able to input machines, modify existing data, or use other options available from each machine element.

Chapter 2: Glossary

A

Attach. Action of selecting a file and uploading it to dokify for use by the client. One of the most important actions in the application.

Assign. Relationship between two elements, at least one of them being a group. The elements may be: a company, an employee, a machine, a user or a group.

Attribute. Each of the configurable elements of a requirement.

Automatic expiry. Property that prompts the document to expire when the group to which the document belongs is de-assigned.

Certifications. Marks the document as a previous document before asking for any other document. The rest of the documentation will not be requested until the marked documents are validated as Certified. The documents marked as Certified are understood as previous documents and must be provided.

Client alias. Name that the company assigns to the document. This name is only seen if the document is requested by a single client. If not, the name of the document type is seen.

Conditions. Restricts to which elements the document is requested, based on a comparison of element assgns.

Download. Gives the document the property of being downloadable i.e. it is not a document that needs to be attached. The company supplies it.

Duration. Number of days that a requirement is valid.

Example document. Download document, with a similar name to the document being created, which may serve as a template or reference.

Manual expiry. Always requests the document expiry date and suggests a date obtained from the duration of the element, although it is not taken into account.

Obligatory. Feature that prompts a requirement to be attached in order to start working.

Reference to company. Protects the relationship between the company and the applicant (employee or company). If the applicant ceases to be linked to the company, the requirement will cease to be seen:

Group - Company - Applicant

Reference to contract chain. Multiplies the requirement by as many contractor chains as may exist between the origin and the destination:

Group - Contract chain - Applicant (employee or machine)

C

Company. Organisational unit dedicated to industrial, merchant or service activities with the aim of profit-making.

Contract. A company acts as a contractor when it does work for another company, which then acts as the client of the contractor.

Corporation. A mechanism to manage several companies in the same group. It is, effectively, a collection of companies. Companies that belong to a corporation have certain peculiarities. For example, groups created for corporations can be assigned to the companies that make up part of the corporation.

D

Dashboard. Place in the application from which you can view a summary of the company status.

Destination module. Indicates the company, employee or machine from which a requirement is requested.

Document date. Date of a requirement being issued.

E

Employee. Worker at a company designated for a certain job.

A company may act as a client, as a contractor or as a subcontractor.

Expiry date. Date on which a requirement expires.

G

Group. Element assigned to a user, a company, an employee, a machine or another group.

L

Load date. Complement used to filter. It can be assigned to users, organisations, groups or requirements.

M

Machine. Physical elements that employees use to carry out their contracted work.

N

News. Complement used by the client to inform dokify users about new developments, rules, or anything else considered of interest. The news can be viewed on the dokify homepage.

O

Origin module. Indicates the company, employee or machine, organisation or group that requests a requirement.

P

Permission. Each of the actions to which the user has access.

Profile. Collection of authorisations associated with a company. A user always has a unique profile associated with the same.

R

Rejected. Action performed to indicate that an attached document is not correct.

Relationship. Connection between two elements.

Request. Mechanism used by dokify to tell users which documents they must attach.

Requestable. Each of the elements from which a document can be requested. Requestable: company, employee, machine.

Requirement. Collection of attributes that define requests.

Role. Collection of authorisations that the client will supply to users. Possible roles are:

- default
- Validate
- Review
- View
- View whitout downloading
- View only companies
- View and assign
- Administrate without configuring
- Attach only

- Attach and validate

- Administrate with attaching

- Insert only

- Administrate only employees

S

Subcontractor. Company contracted by the contract.

Suggestions. Space aimed at users. A place to indicate improvements, changes or any topic that may help dokify improve its application.

T

Tag. Complement used to filter. It can be assigned to users, organisations, groups or requirements.

Type of requirement. Space aimed at users. A place to indicate improvements, changes or any topic that may help dokify improve its application.

U

User. Formed by a user identifier, a name and an email address. The user is employed to access the application.

V

Validate. Action performed to indicate that an attached document is correct.

thank you

dokify

first colaborative business network
minimum effort, maximum benefit

902 11 20 33
www.dokify.net