

DataQ Power User Guide

INTRODUCTION

This manual covers features available only to Power Users. It covers inviting new users (contributors) into the system and assigning relevant permissions. If in doubt please ask. Applying permissions incorrectly may expose confidential documents. Email us at support@dataq.co.uk

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MANAGING CONTRIBUTORS.

INVITING USERS TO PARTICIPATE ON DATAQ

The user invitation function allows **POWER USERS** to invite users and pre-assign permissions greatly reducing the time required to getting an end user up and running as a contributor. Users who are invited are able to login and contribute based on their permissions. Similar functions are available to Package and Package admin users (however they cannot remove contributors from projects or delete users).

To further aid this process any Package / Package Admin and Power user has access to the global contact list. The global contact list contains a list of all users who are registered for DataQ and are working on any project within the same client space.

CONTACT NAME	COMPANY NAME	PHONE	DDI/MOBILE	EMAIL	ROLE	ACTIONS
Sean McInnes	PrintQ	01707818069	01707818069	support@dataq.co.uk	Contributor	
Jack Jones	ACME Construction	01707818069	01707818069	jack.jones@dataq.co.uk	Contributor	REMOVE EDIT DELETE
Julie Richardson	ACME Construction	01707 818069	01707 818069	julie@dataq.co.uk	Contributor	REMOVE EDIT DELETE
Paule Betts	Betts Brickwork	01707818069	01707818069	pb@dataq.co.uk	Contact	INVITE REMOVE EDIT DELETE
Greg Brown	DataQ	01707 818069	01707 818069	greg@dataq.co.uk	Contributor	REMOVE EDIT DELETE
Jo Crest	DataQ	01707818069	01707818069	jc@dataq.co.uk		INVITE ADD EDIT DELETE
Parker Gibbs	DataQ	01707818069	01707818069	pg@dataq.co.uk		INVITE ADD EDIT DELETE
Paul Walker	DataQ	01707 818069	01707 818069	paul@dataq.co.uk		INVITE ADD EDIT DELETE
Peter Gibson	DataQ	01707 818069	01707 818069	peter.gibson@dataq.co.uk	Power User	REMOVE EDIT DELETE
Adam Long	Finch Electrical	01707818069	01707818069	adam@dataq.co.uk	Contact	INVITE REMOVE EDIT DELETE
Edward Finch	Finch Electrical	01707 818069	01707 818069	ef@dataq.co.uk	Contact	INVITE REMOVE EDIT DELETE
Roger Black	Ironworks Ltd	01707818069	01707818069	roger@dataq.co.uk	Contact	INVITE REMOVE EDIT DELETE

Use this strategy when finding and adding new contributors and contacts –

1. On global contacts, use the filters to search for an existing user. You can filter by name / surname / company or email address to locate a user.
2. If the user is not found follow the **ADD CONTACT** or **INVITE USER** links to begin user or contact registration. Each registered user requires a unique email address.
3. If the user is found, use **ADD** to connect them to the current project as a contact or use **INVITE** to invite the user to contribute to the current project.

Use **PROJECT CONTACTS** to review contacts and contributors connected to each project.

Hover over each user's role to review the roles currently assigned to this user on the current project.

Use **EDIT** to edit a contact or contributors details

Use **REMOVE** to remove a contact or contributor from the current project.

Use **ADD** to add a contact to the current project.

Use **DELETE** to make the users profile inactive (**this will remove the user from ALL projects and should be used with caution!**)

If a user does not require direct access to DataQ please add them as a contact (see User Guide). A contributor on one project may also be added as a contact on a different project.

To invite a new or existing user to participate on your project follow these steps.

1. Enter the user's unique **USER EMAIL** address to determine if they are already a member of DataQ.
2. If they are not already registered complete their first **NAME** and **SURNAME**.
3. Select their **COMPANY** or create a **NEW COMPANY** for them.
4. Select their **LOCATION** or add a branch office or site location.
5. Assign **PROJECT ROLES** (please see notes at the end).
6. **ADD FOLDERS** which they will require access to.
7. Assign relevant **PERMISSIONS** (see notes under Assigning folder permissions)
8. **SEND THE INVITATION**.

Project: London_Road

User email: 1

Name: Surname: 2

Company: New company 3

Location: Head office 4

Project roles: Download Package Package admin Power user 5

Assign folder permissions

+ JD Architects 6

Folder name	Add	Edit	Delete	Download	Reviewer	Subfolders	Clear	Path
JD Architects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Clear"/>	<input type="button" value="Info"/>
JJ Engineers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Clear"/>	<input type="button" value="Info"/>
SH Site_Surveys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Clear"/>	<input type="button" value="Info"/>
PG Landscaping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Clear"/>	<input type="button" value="Info"/>

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SEAN MCINNES

Notes on Project roles

Package The user can view, create, delete, modify and distribute packages in the basket.

Download The user can batch download files from the basket.

Power User The user can create top level folders, invite contributors and set permissions.

Pending Resend **Jeremy.Black** DataQ j.black@dataq.co.uk

Until a user accept the invitation the user status will show as **PENDING** on the contact list.

You may **REVOKE** the invitation by clicking on pending.

You may **RESEND** the invitation by clicking resend.

Any contributor can resend the invitation by clicking **RESEND**.

A user invitation is valid for 1 month after which point the pending invitation will revert to a contact.

If a user invitation is revoked the recipient of the invitation converts to a contact.

CONVERT A CONTACT TO A CONTRIBUTOR

Simply follow the steps to **INVITE A USER** and assign the correct project roles and permissions. If the user is not already a contributor on another project or does not have login credentials they can request a password from the login page. This will be returned to their email address.




REMOVE A CONTACT

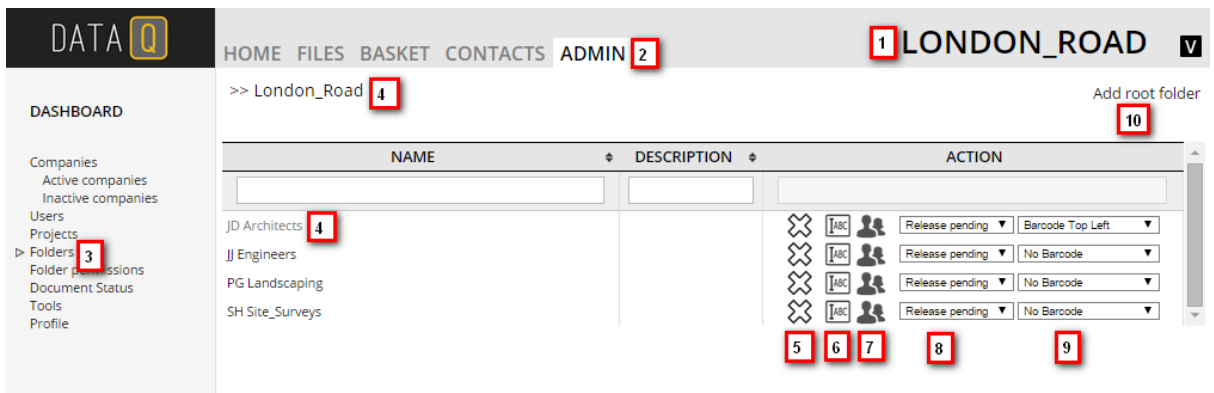
From **PROJECT CONTACTS** or **GLOBAL CONTACTS** select **REMOVE**.

MANAGING FOLDERS.

ADDING, DELETING & RENAMING FOLDERS

Typically each project contains a folder for each consultant's information to be uploaded to. Follow these steps to create a new top level folder and assign permissions –

1. Select the correct project from the project dropdown
2. Navigate to the ADMIN tab
3. Select the FOLDERS menu
4. Navigate folders using the PATH or by clicking to open folders or subfolders
5. Use the X icon to delete folders. 
NOTE | All files contained within any deleted folder will be deleted!
6. Rename folders using this icon. 
7. Review applied permissions from this icon. 
8. If Project Workflow is required please select the preference to release or hold pending files.
9. Set QR code application position if this is required. Applies to PDF documents uploaded only.
10. Select ADD ROOT FOLDER or ADD SUB FOLDER as applicable. Keep folder names short.
11. Provide a unique folder name and SAVE FOLDER.
12. No permissions are assigned to new folders by default. Proceed to FOLDER PERMISSIONS or INVITE USER(S) in order to assign permissions



The screenshot shows the DATA Q ADMIN interface. The top navigation bar includes HOME, FILES, BASKET, CONTACTS, and ADMIN (2). The current project is LONDON_ROAD (1). The breadcrumb path is >> London_Road (4). The left sidebar shows the FOLDERS menu (3). The main content area displays a table of folders with columns for NAME, DESCRIPTION, and ACTION. The folders listed are JD Architects (4), JJ Engineers, PG Landscaping, and SH Site_Surveys. Each folder row has several action icons: a delete icon (X), a rename icon (ABC), a permissions icon (people), a release pending dropdown, and a barcode position dropdown. The icons are numbered 5 through 9.



The 'Add Folder' form is shown below. It includes a Project dropdown menu set to 'London_Road'. There are input fields for Name (11) and Description. A 'Check Name' button is next to the Name field. A 'Save Folder' button is at the bottom right.

ADDING QR CODES TO PDF FILES

QR codes can be turned on or off for any folder or subfolder. When turned on a QR code is added to each PDF file uploaded in the location specified on the folder.

1. On the ADMIN tab select folders.
2. Change the dropdown selection to select the appropriate QR code position.

Options are –
TOP LEFT
BOTTOM LEFT
TOP RIGHT
BOTTOM RIGHT

The screenshot shows the DATA Q ADMIN interface. The top navigation bar includes HOME, FILES, BASKET, CONTACTS, and ADMIN (highlighted). The breadcrumb path is >> London_Road. The left sidebar has a 'FOLDERS' tab highlighted. The main table lists folders: JD Architects, JJ Engineers, PG Landscaping, and SH Site_Surveys. The 'ACTION' column for 'JD Architects' is expanded, showing a dropdown menu with options: Barcode Top Left, No Barcode, Barcode Bottom Left, Barcode Top Right, Barcode Bottom Right, and No Barcode. The 'Barcode Top Left' option is selected. A message at the bottom reads 'SOME MESSAGE FOR ADMIN - manage folders TAB'.

Notes -

Once QR Codes are applied to uploaded files they cannot be removed. To remove or revise the barcode position you would first need to change the barcode setting and re-upload the file(s).

QR Codes are applied as a layer on the PDF file. It is possible to turn off the layer if your PDF viewer allows you to do this. This can be useful if you need to print a document without the QR code.

Sample DWG and PDF files are provided to supply to consultants as a guide from our website – <http://dataq.co.uk/support/dataq-qrcodes.dwg>

<http://dataq.co.uk/support/dataq-pdf-qr-code.zip>



ASSIGNING FOLDER PERMISSIONS


Assigning permissions is quick and easy.

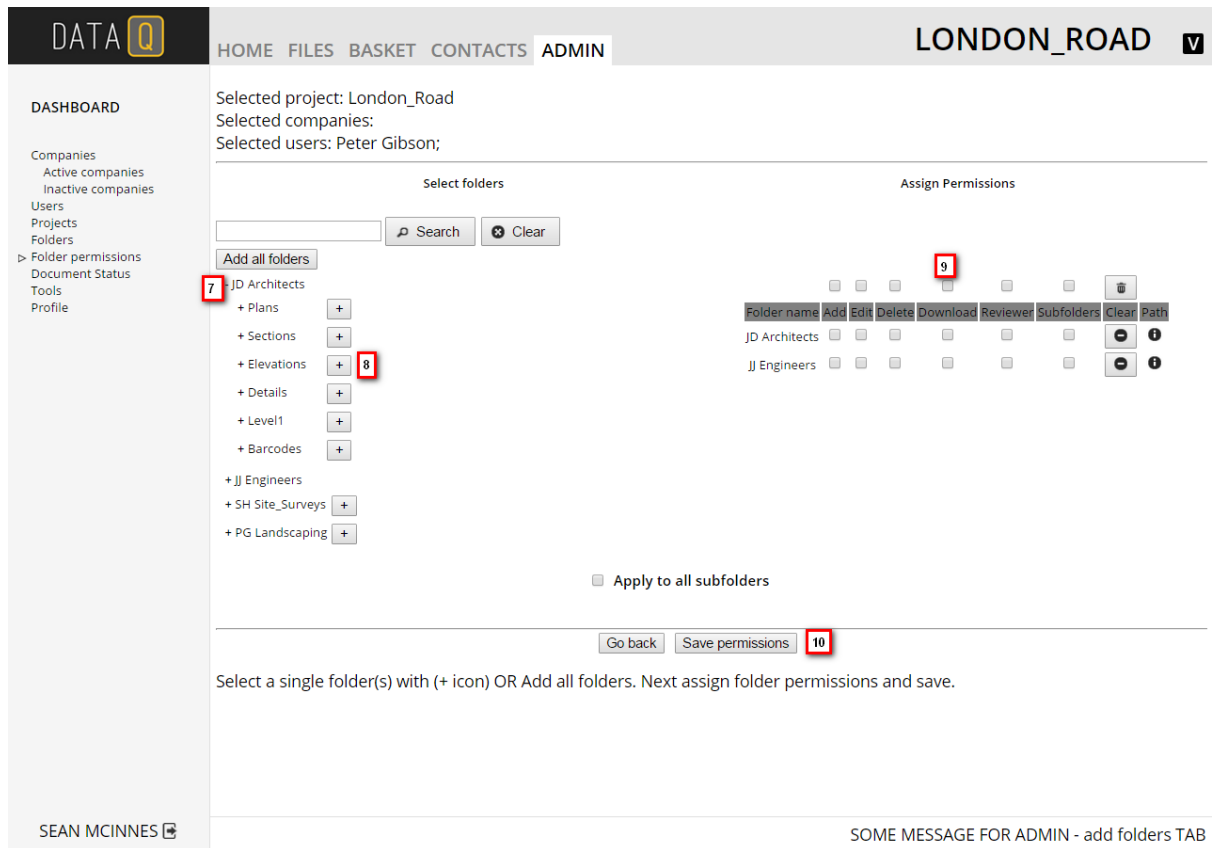
1. Select the correct project.
2. Select the ADMIN tab.
3. Select FOLDER PERMISSIONS.
4. Expand any company using the + sign.
5. Click the + Icon adjacent to any user you wish to assign permissions for.
6. Proceed to the next window to select folders and permissions to apply.

The screenshot shows the DATA Q ADMIN interface for the LONDON_ROAD project. The interface includes a navigation menu on the left with 'Folder permissions' highlighted (3). The main content area shows the 'Select Users' section with a search bar and a list of users: ACME Construction (4), DataQ, Greg Brown (5), Peter Gibson, and testco. A 'Next - Select permissions' button (6) is visible at the bottom. A 'Remove User/s' button is also present.

Click to expand company lists or (+ icon) to add companies and/or users.

Continued on next page.....

7. Expand the folders to reveal subfolders
8. Select the  icon to add any folders to your selection (under assign permissions)
9. Select the appropriate permissions based on the users you have previously selected. **Typically you should NOT allow users to Delete files.**
10. Save the permissions.



DATA Q HOME FILES BASKET CONTACTS ADMIN LONDON_ROAD

Selected project: London_Road
Selected companies:
Selected users: Peter Gibson;

Select folders **Assign Permissions**

7 JD Architects

- + Plans 8
- + Sections
- + Elevations
- + Details
- + Level1
- + Barcodes

+ JJ Engineers

- + SH Site_Surveys
- + PG Landscaping

Apply to all subfolders

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Select a single folder(s) with (+ icon) OR Add all folders. Next assign folder permissions and save.

SEAN MCINNES SOME MESSAGE FOR ADMIN - add folders TAB

Folder name	Add	Edit	Delete	Download	Reviewer	Subfolders	Clear	Path
JD Architects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Clear"/>	<input type="button" value="Path"/>
JJ Engineers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Clear"/>	<input type="button" value="Path"/>

Notes

Add permission

Edit permission

Delete

Download

Reviewer

The user can add files and subfolders in this location.

The user can replace files and modify file data such as revision status.

The user can permanently delete a file and its history.

The user can click to open the file on the HOME tab and download the file.

The user will be required to approve or reject files for this folder.