DropDoc Training

User Levels & Functions



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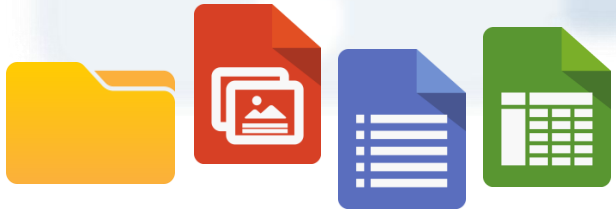
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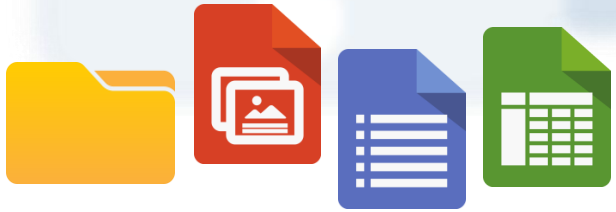
User Levels

1.0 DropDoc – Intro
2.0 Viewing – Viewing Slides & Submitting Forms
3.0 Editing – Editing Drafts & Contributing Content
4.0 Publishing – Creating Docs & Data Structure
5.0 Admin – Managing Users & Permissions



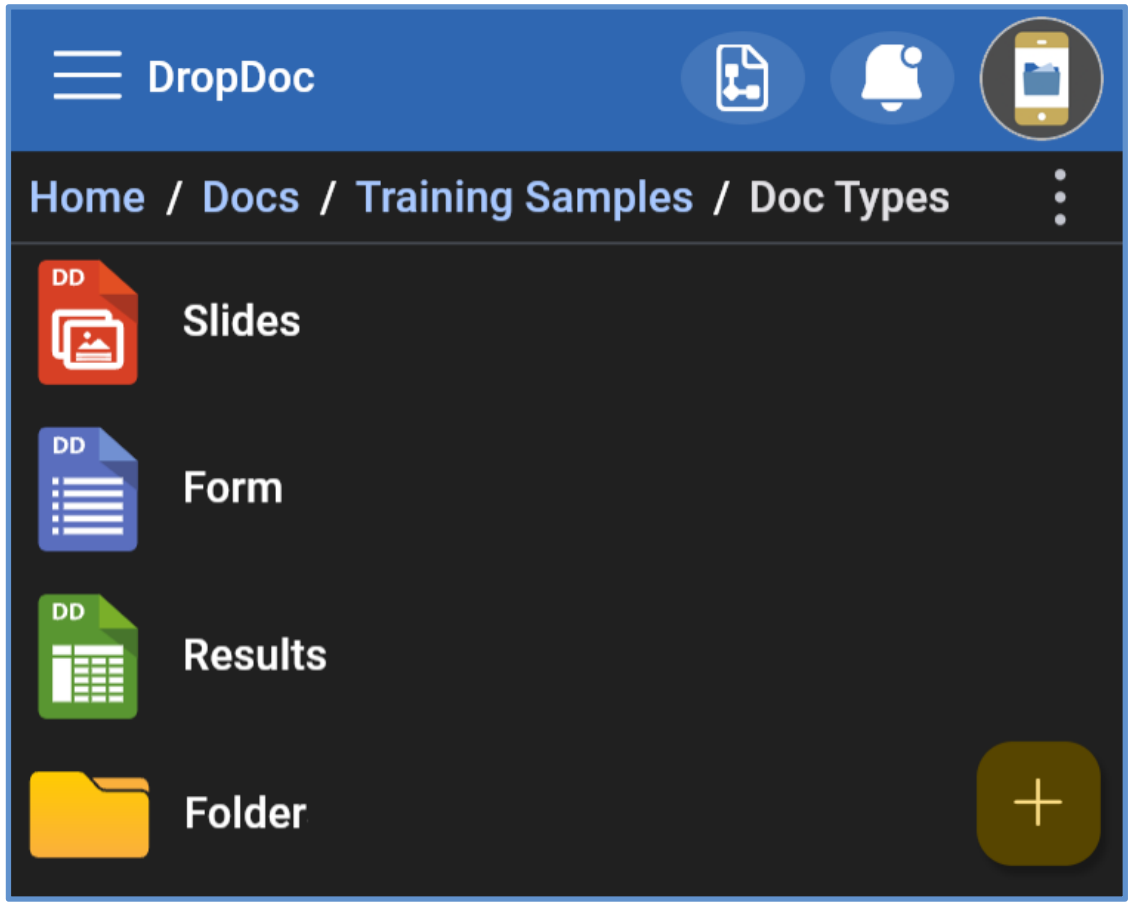
1.0 Doc Intro

1.1 About DropDoc
1.2 Doc Types
1.3 Slides
1.4 Forms
1.5 Results

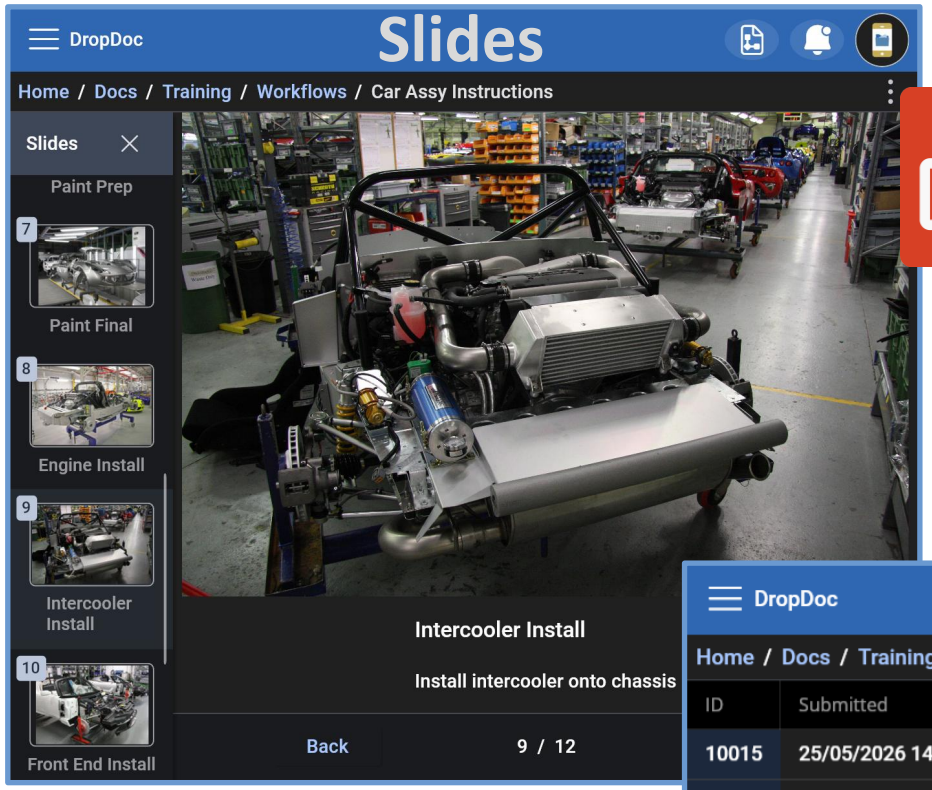


1.1 About DropDoc

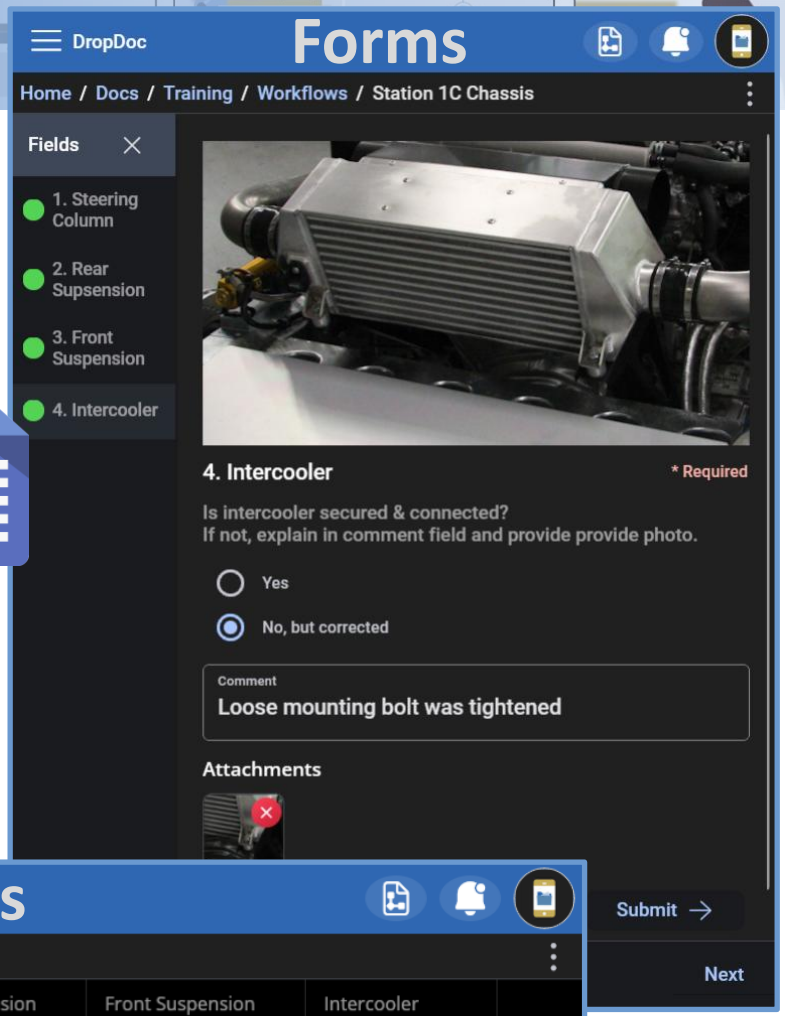
- Simple digital ecosystem for managing operations:
  - Slides convey instructions
  - Forms collect data
  - Results provide feedback
  - Folders navigate Docs
- Content creation & editing on the go - accessible on any device with internet



1.2 Doc Types





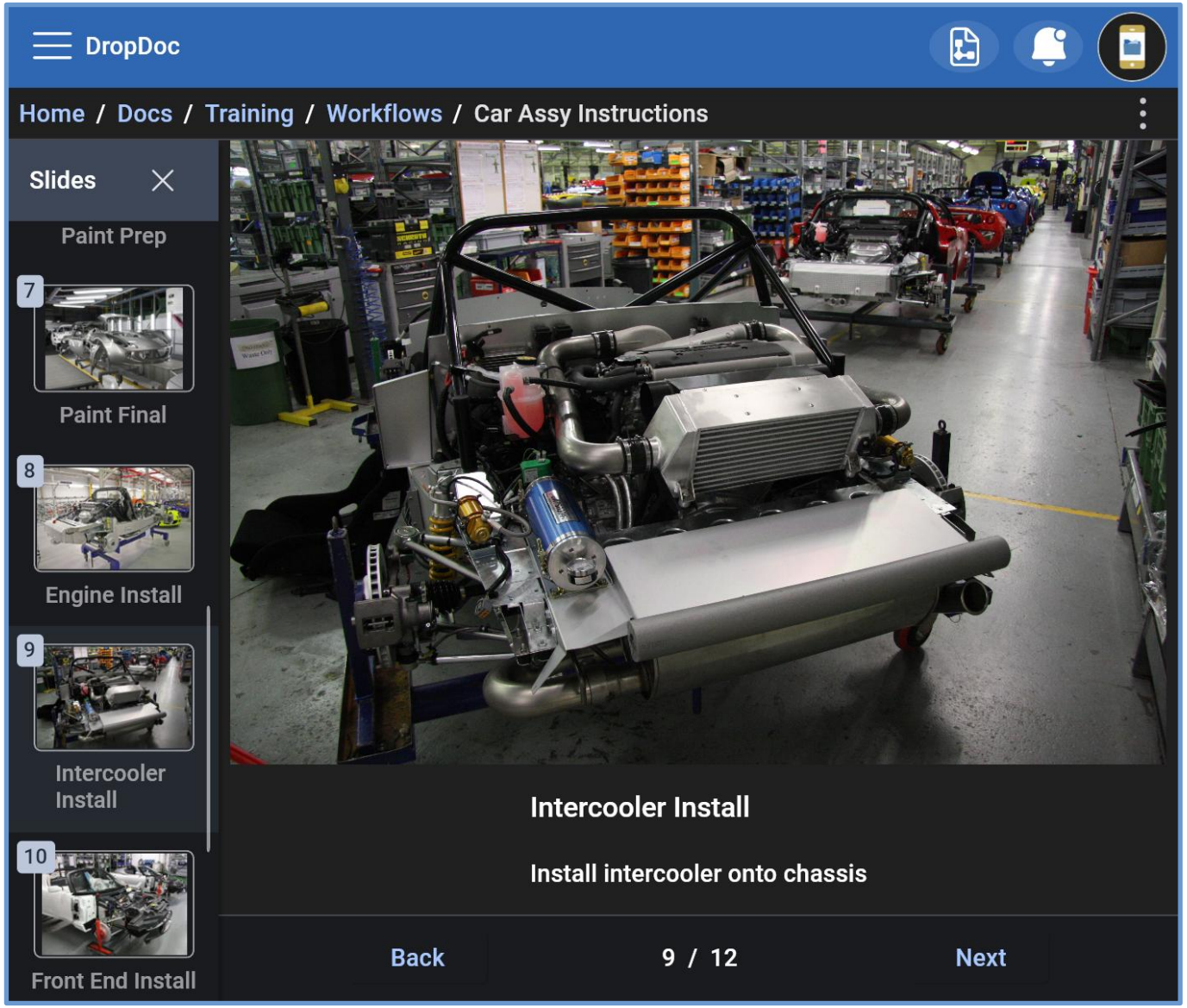




Continuous Improvement Clockwork

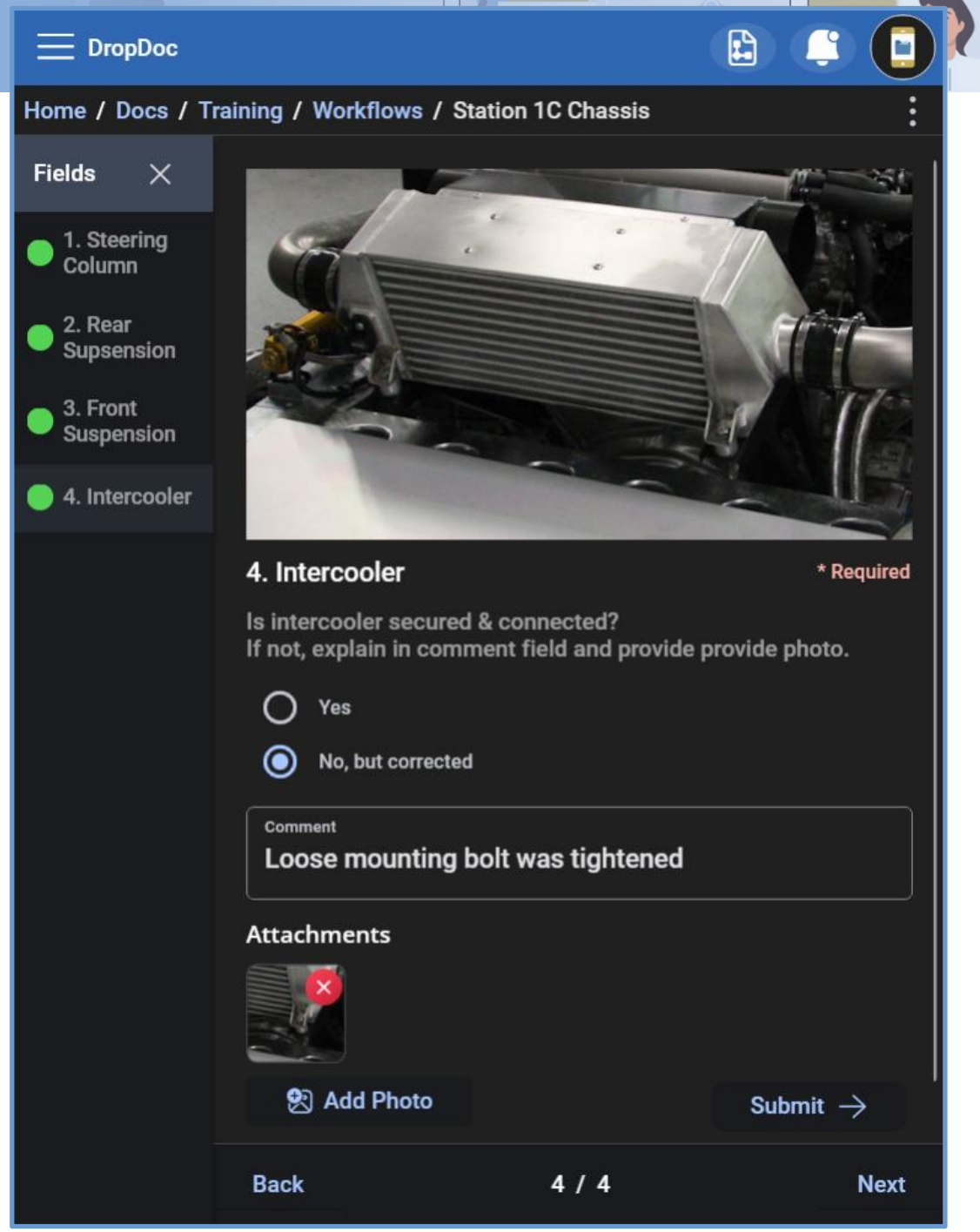
1.3 Slides

- Conveying info using text, photos, videos, links, PDFs and more in the works
- A variety of use cases:
  - Instructions
  - Requirements
  - References
  - Documenting



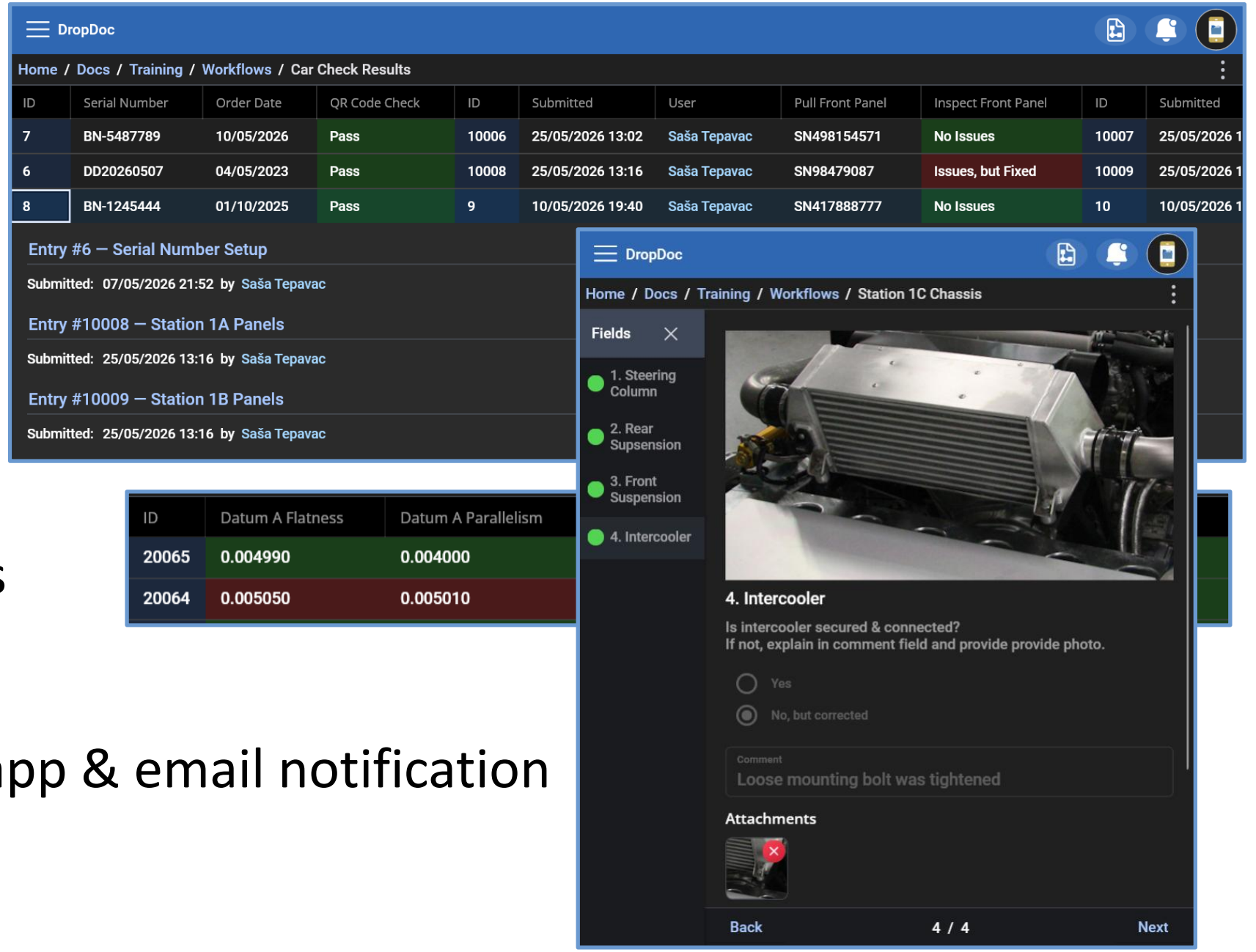
1.4 Forms

- Easy-build questionnaires for collecting data & media
- Use case opportunities:
  - Quality checks
  - Pre-delivery inspections
  - Health & safety
  - Employee training & onboarding
  - Area audits
  - Surveys



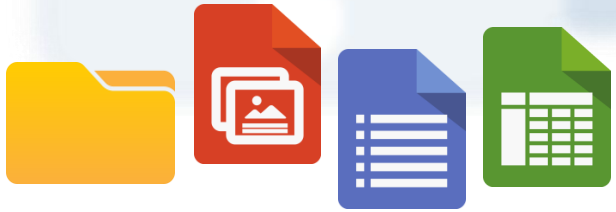
1.5 Results

- Customizable reports for viewing data in Form submissions
- Reviewing submissions
- Error flagging with in-app & email notification



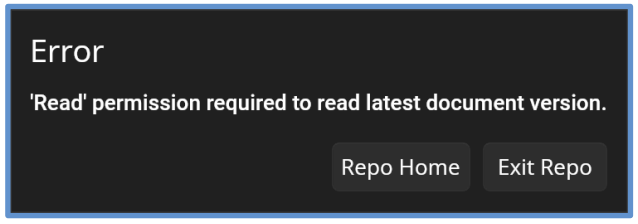
2.0 Doc Viewing

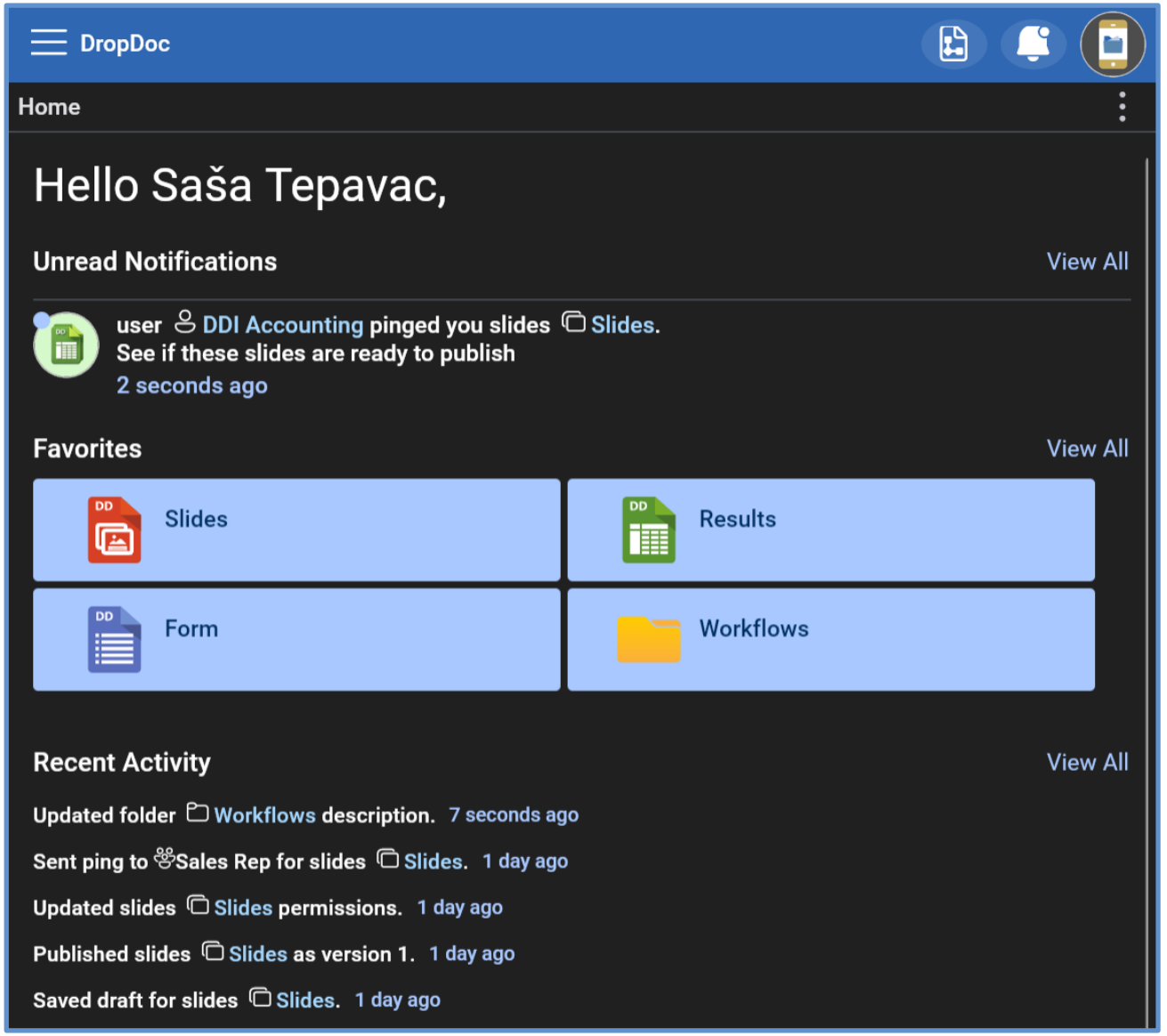
2.1 Home Page
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2.15 FAQ & Support



2.1 Home Page

- Dashboard for important info:
  - Notifications
  - Favorites
  - Recent Activity
  - Alerts
- For read permission, reach out to your organization's administrator

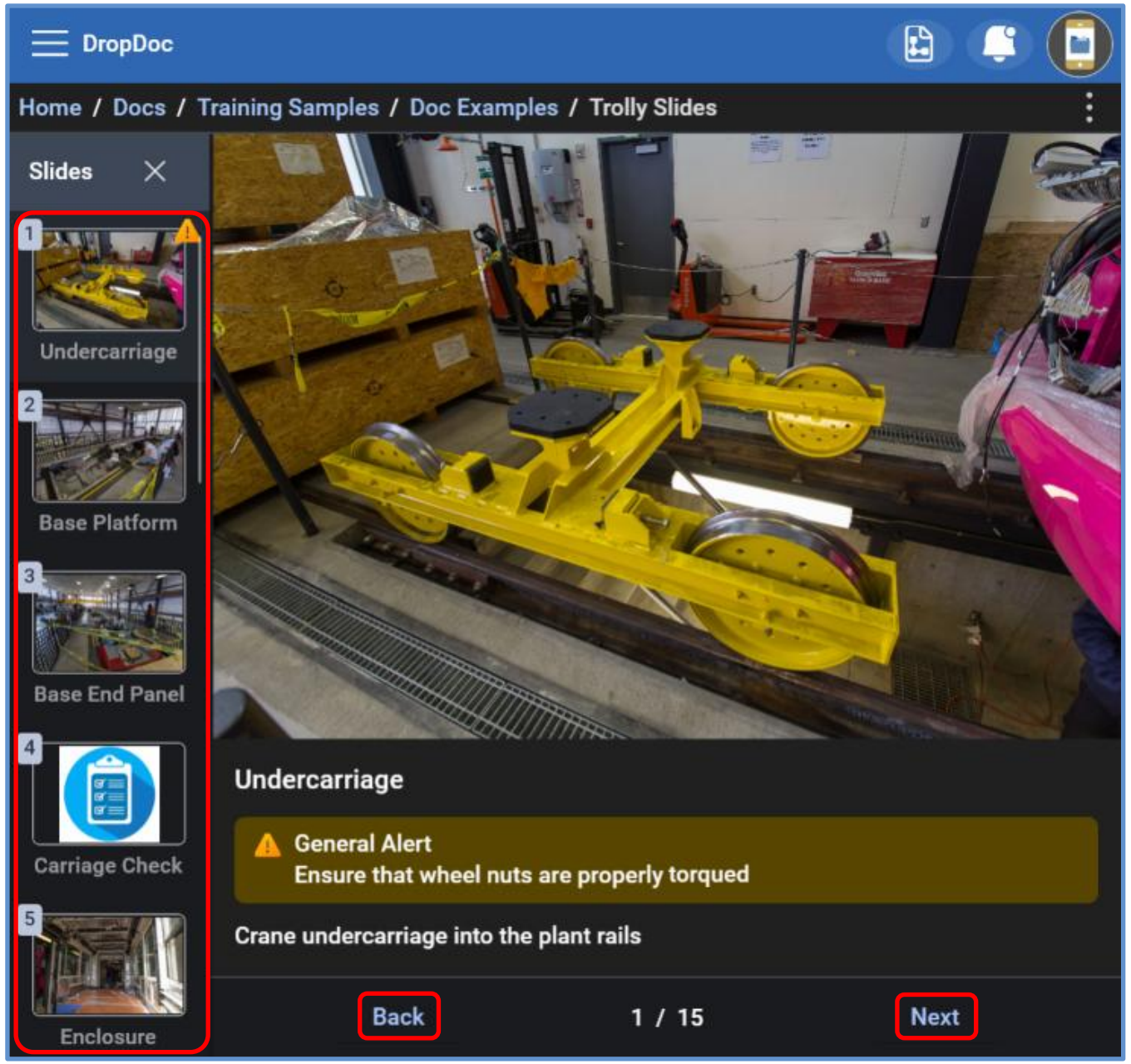




2.2 Viewing Slides

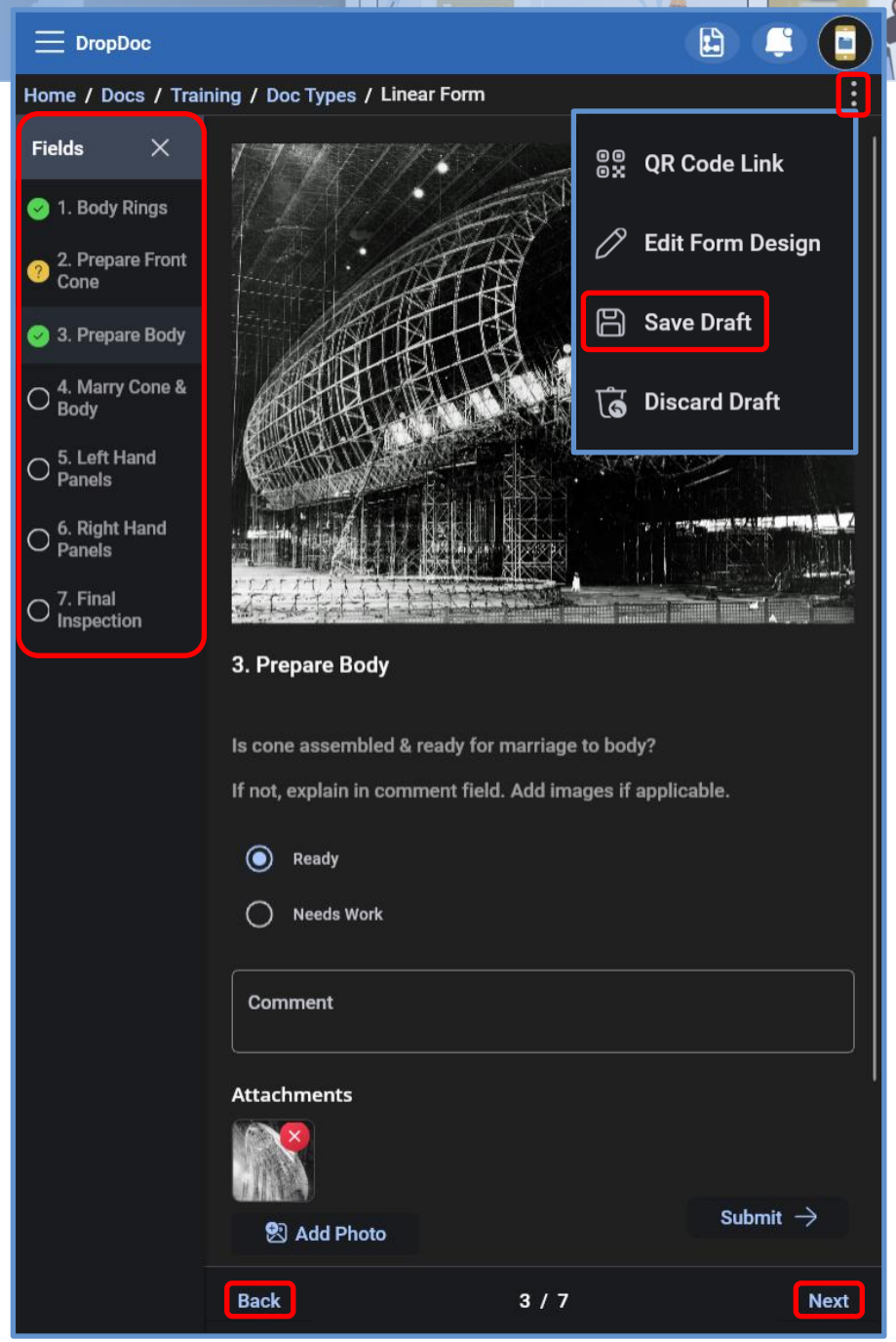
- Navigate Slides by selecting them in the side-panel, or by using the Back & Next buttons
- Explore content through images, videos, PDFs & more
- Pay attention for special Alerts





2.3 Filling Forms

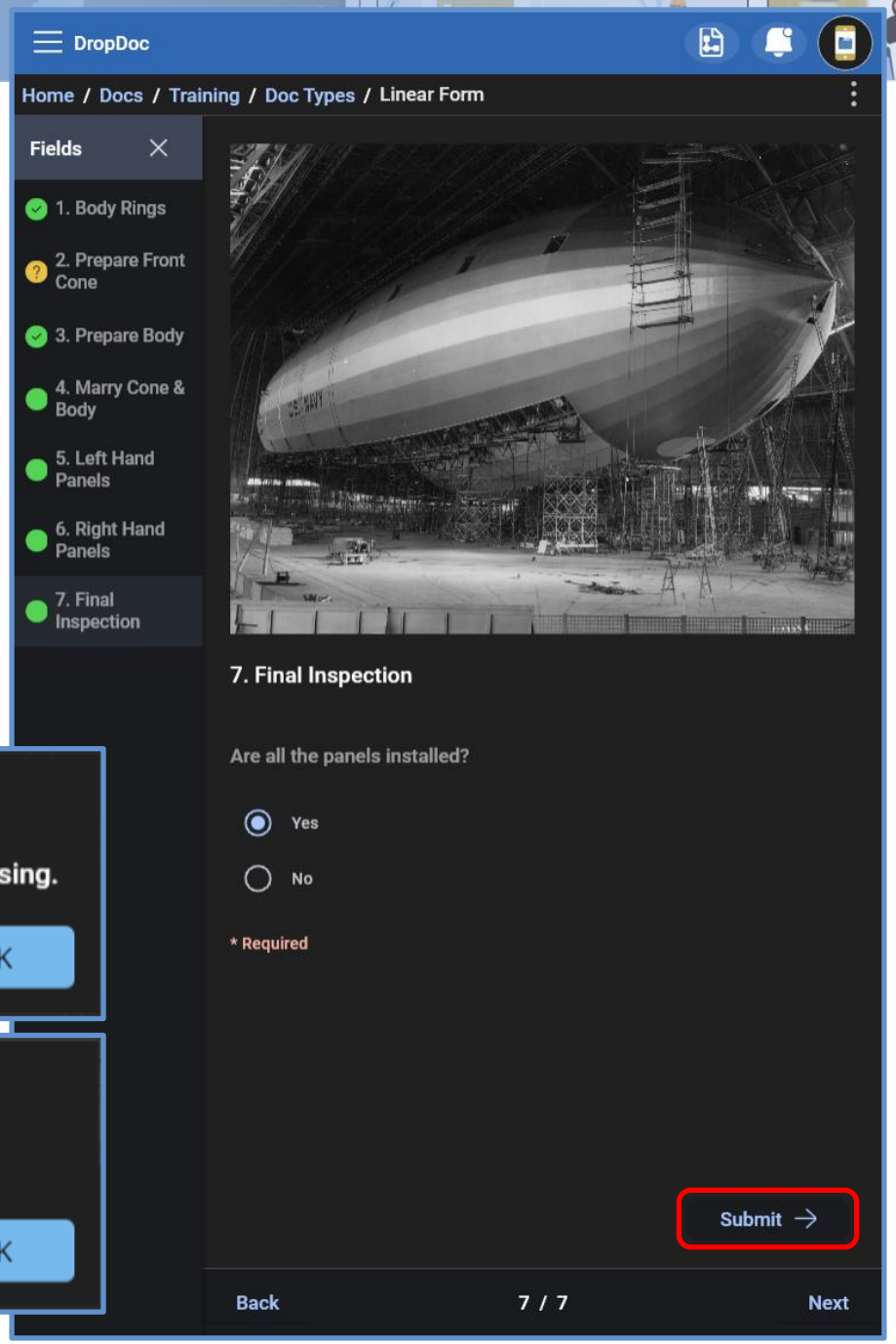
- Navigate questions by selecting them in the side-panel, or by using the Back & Next buttons
- Provide answers & attachments, as required
- If the Form can't be completed at the moment, use the 3-dot menu to Save Draft

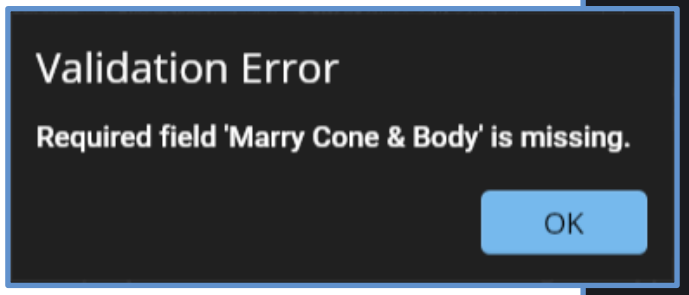


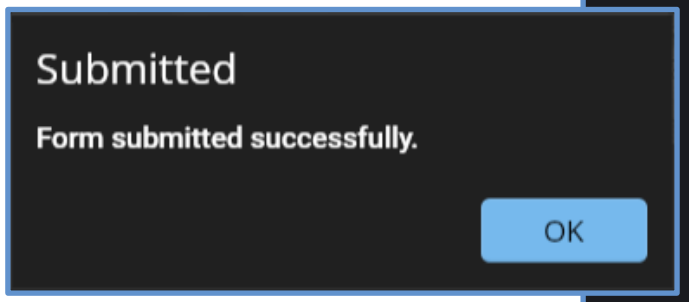
Ref 4.5 – Editing Forms

2.4 Submitting Forms

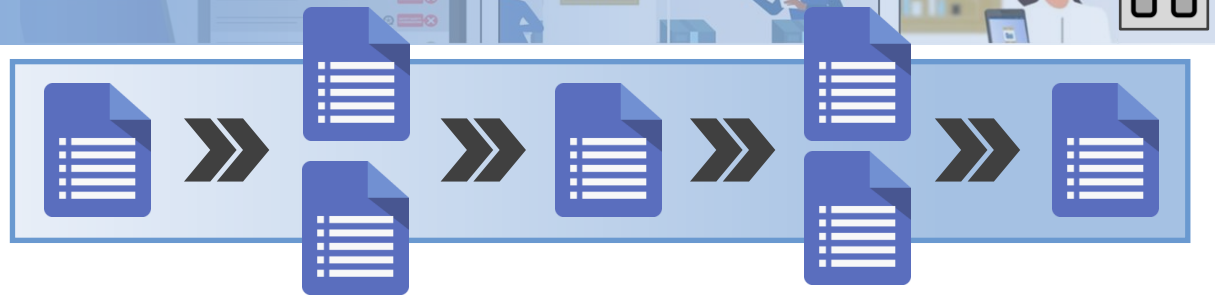
- Submit → form when ready
- Popup informs of any missing info
- Popup notifies once successfully submitted







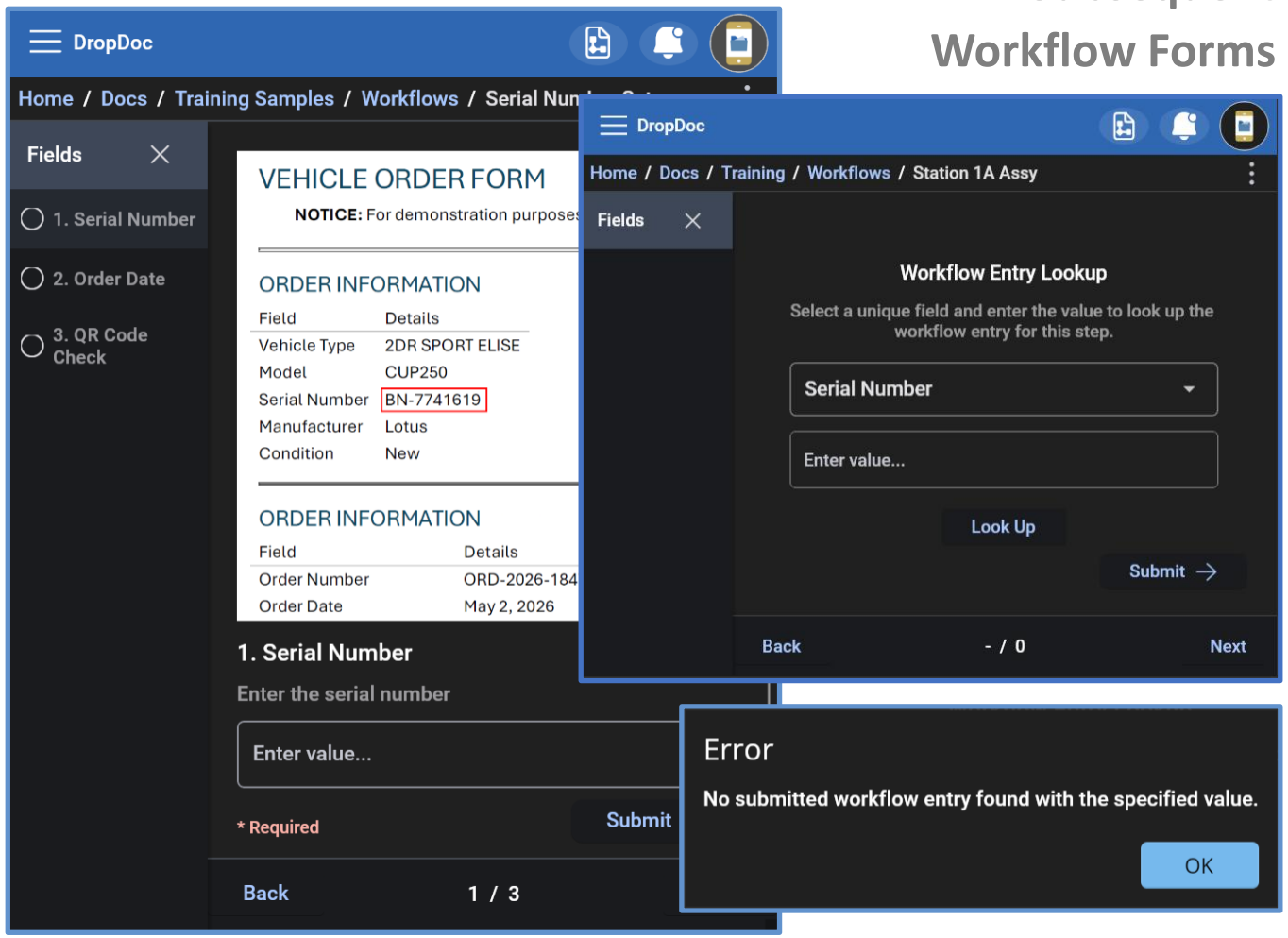
2.5 Using Workflows



- Workflows combine Forms that all report on a unique ID, like job, serial or machine number
- After the 1st Form is submitted, subsequent Forms require the unique ID to continue

1st Workflow Form

Subsequent Workflow Forms



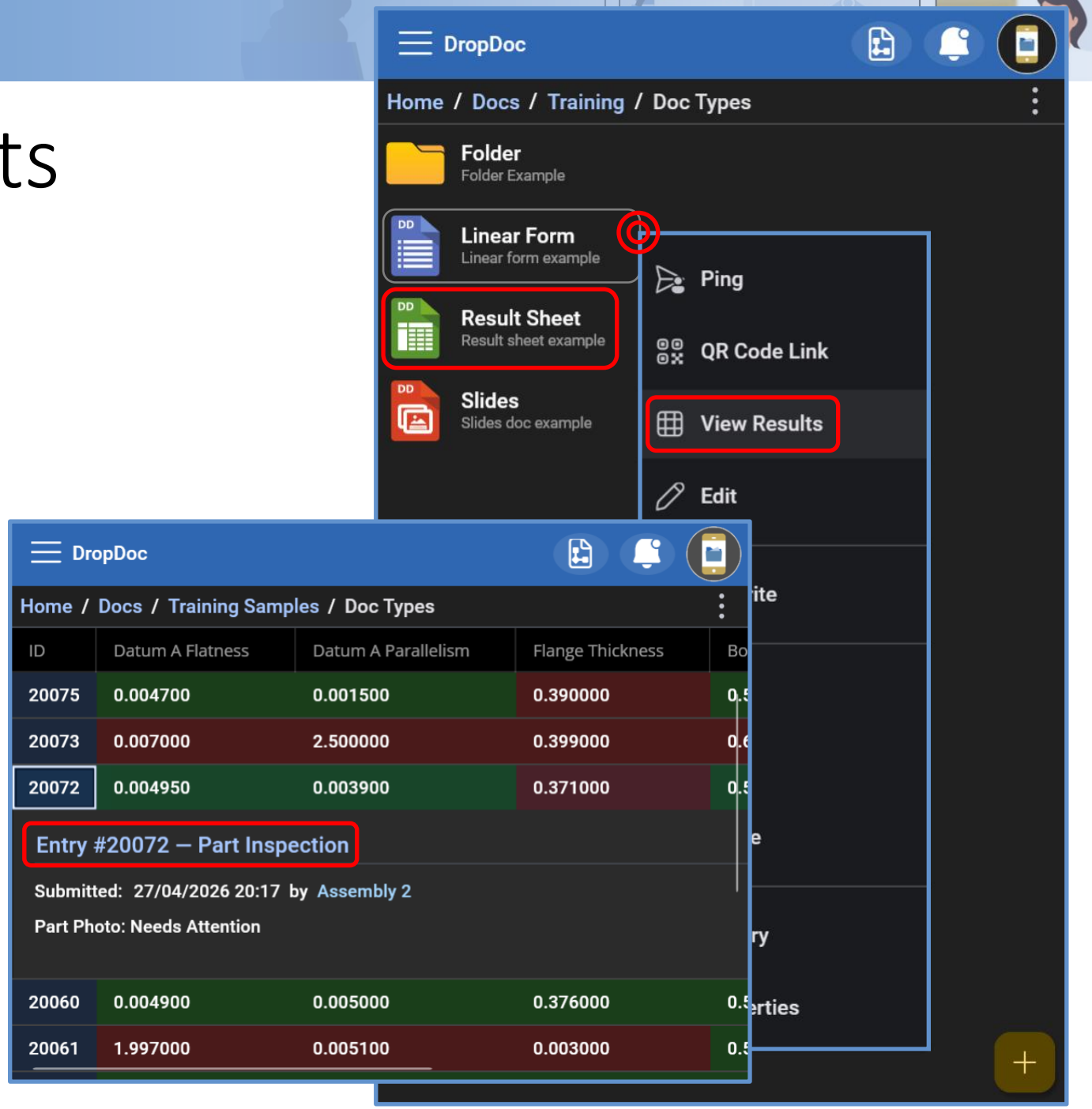
Ref 4.10 - Workflow Forms

2.6 Viewing Results

2 ways to view Results:

- Right click or long press a Form to View Results
- Open a Result Sheet Doc

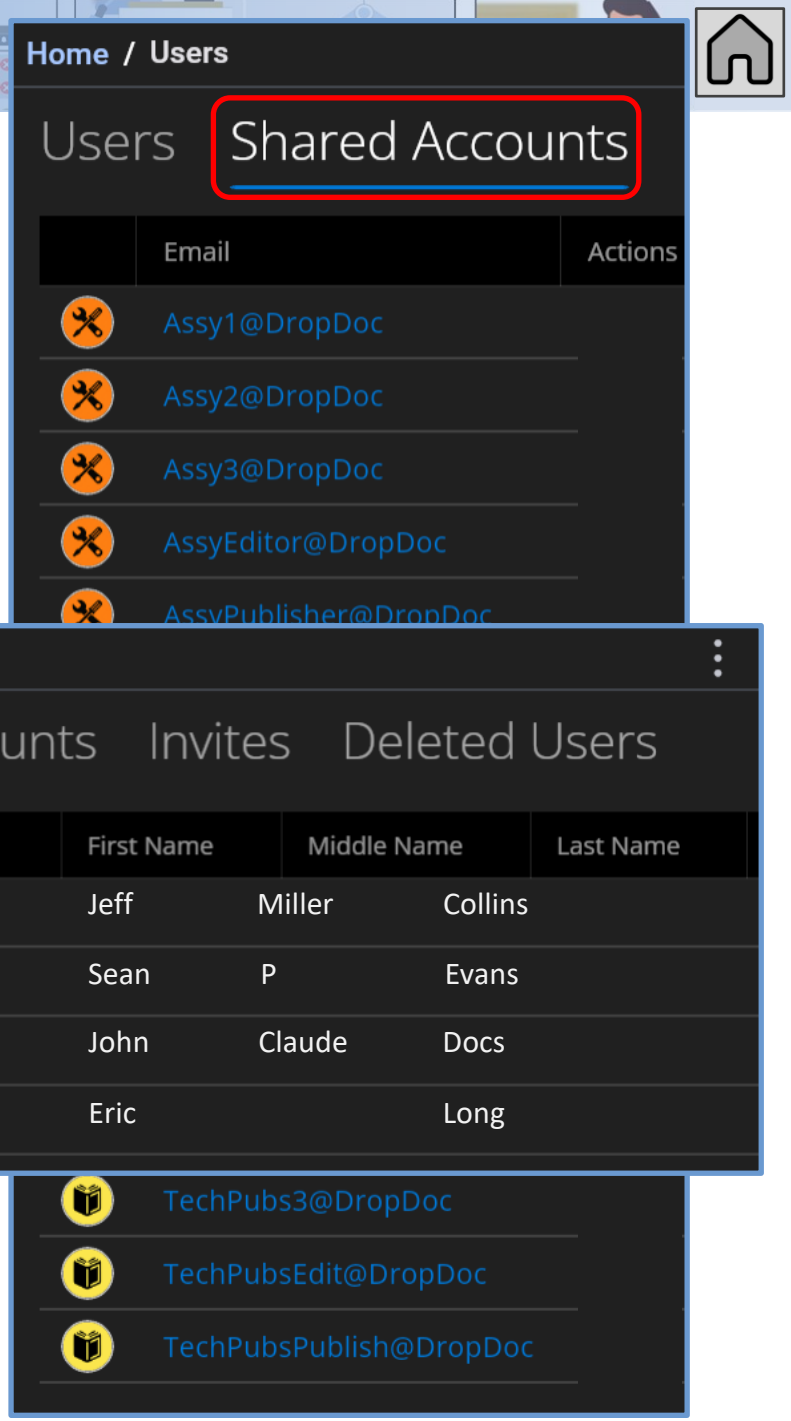
Click on any submission to see additional data.



Ref 4.12 - Creating Results

2.7 User Types

- Single Users
  - Personal email address required to register account
- Shared Accounts
  - Organization administrators generate email
  - Org admins manage password resets

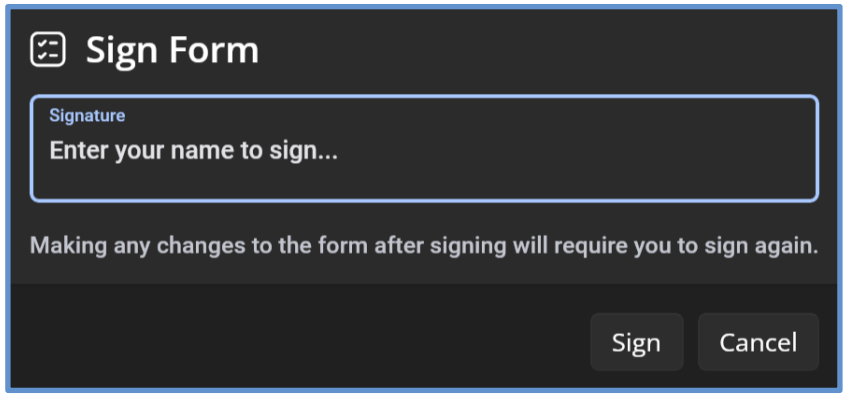


2.8 Signatures

Form Questions that require a Signature behave differently depending on User Type:

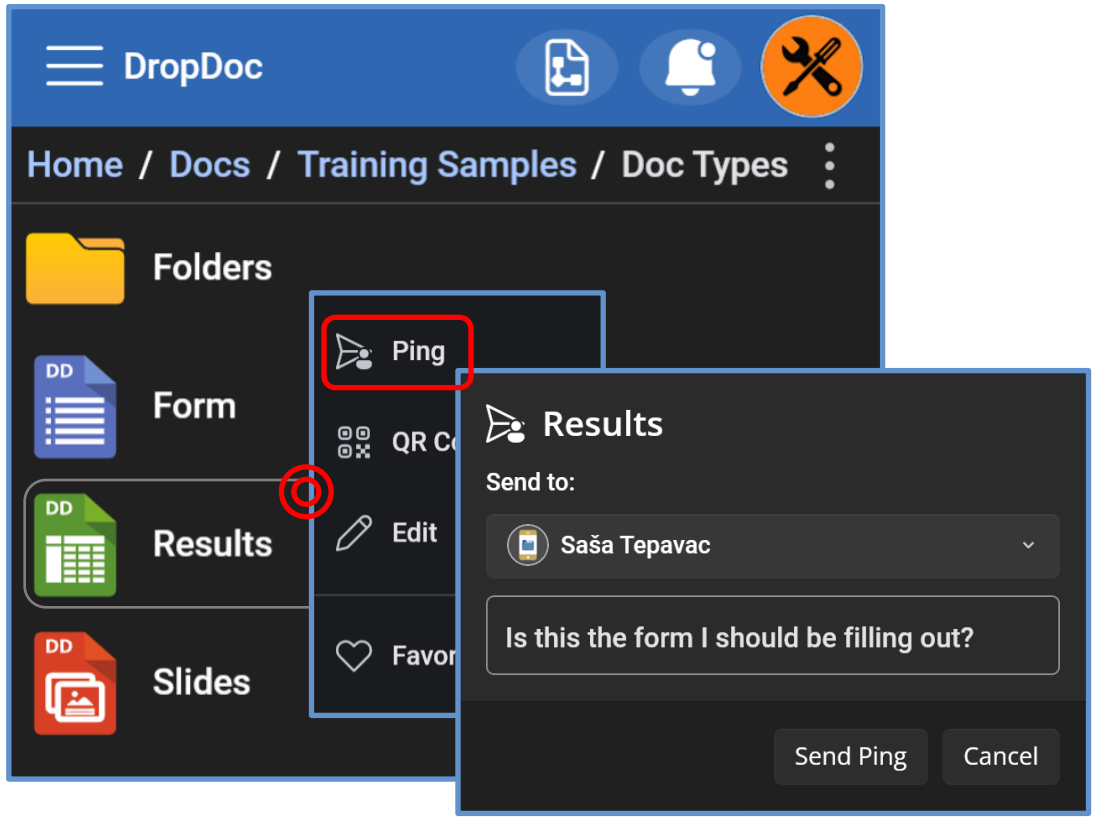
- Single Users have their signatures automatically populated
- Shared Accounts are prompted to fill in their name or employee ID

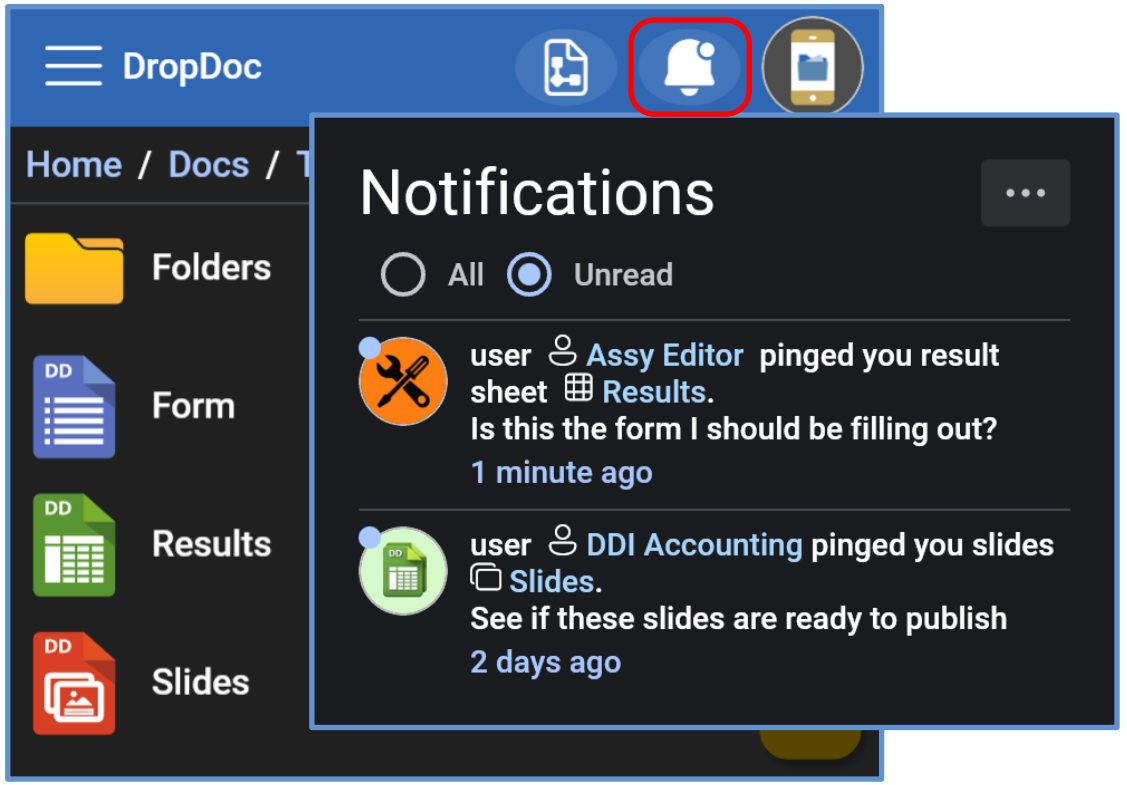




2.9 Pinging

- Pinging can be used to exchange Docs between users & roles
- Pinged Docs show up in the Notifications menu

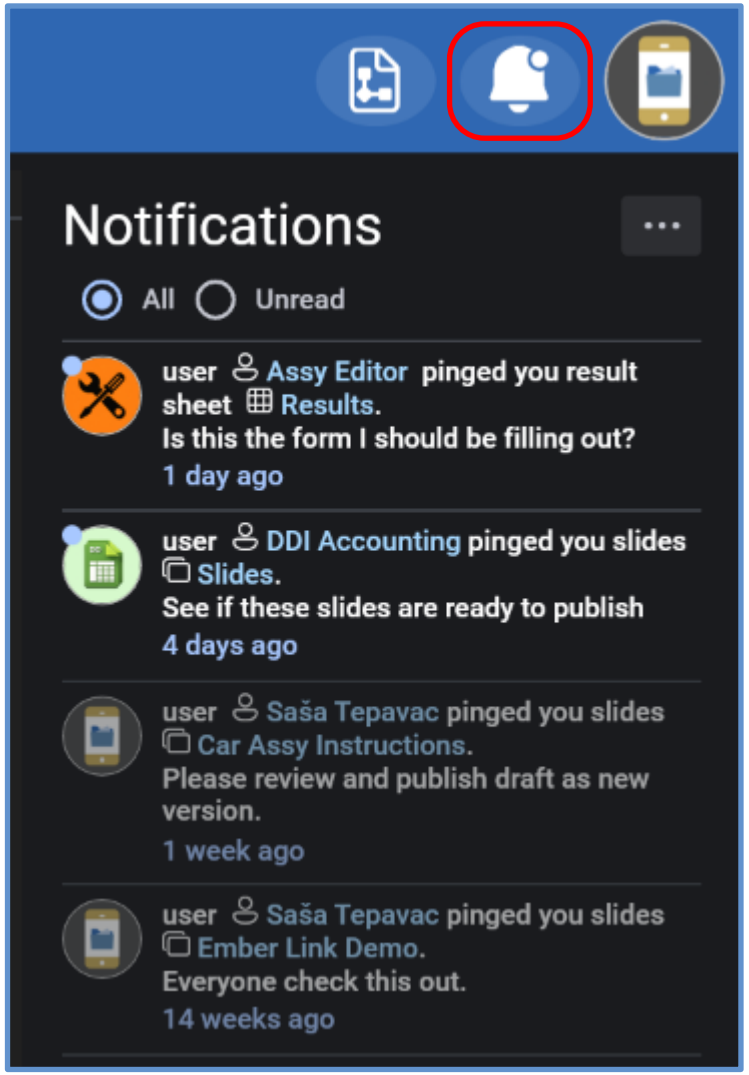




2.10 Notifications Panel

Panel displays a variety of Notification types:

- Pinged Docs
- Doc changes
- Form submissions
- Alerts
- Publishing requests

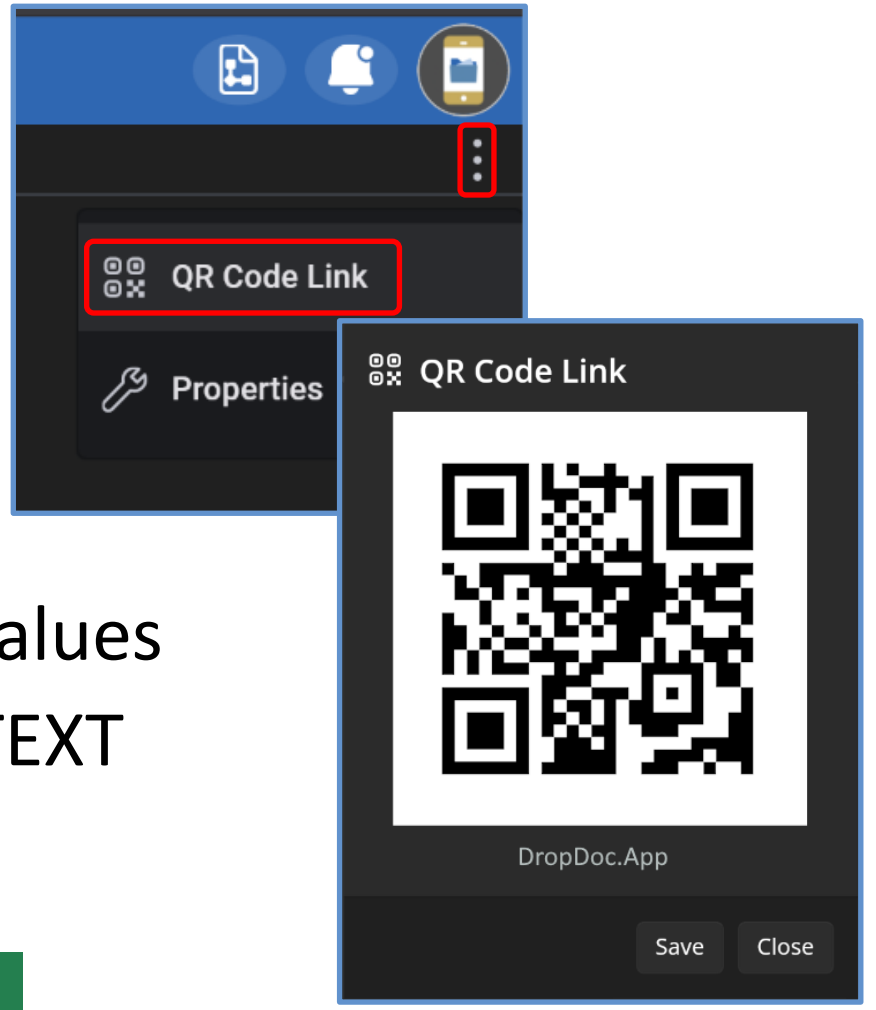


2.11 Scanning QR Codes

- Quick Response (QR) codes are scanned by cameras on smart devices
- They can be used for important info like:
  - Pulling up instructions, references, maintenance checks, tooling info & more.
  - Entering serial numbers, machine IDs, job numbers & other data.



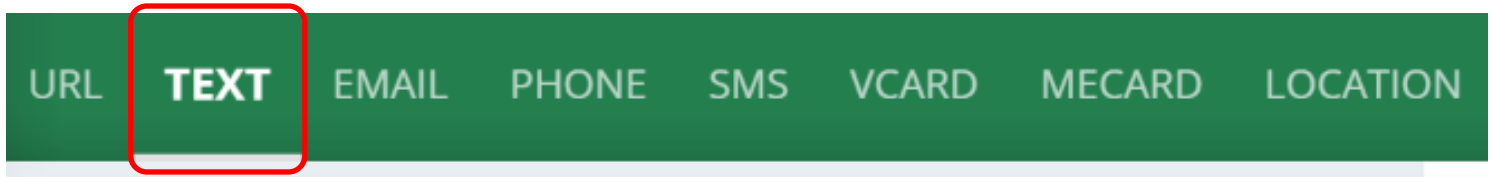
2.12 Generating QR Codes



- Use the 3-dot menu in the top, right corner to generate a QR code for any Doc or Folder

- If using an external app to generate QR code values for data entry, ensure that selected format is TEXT

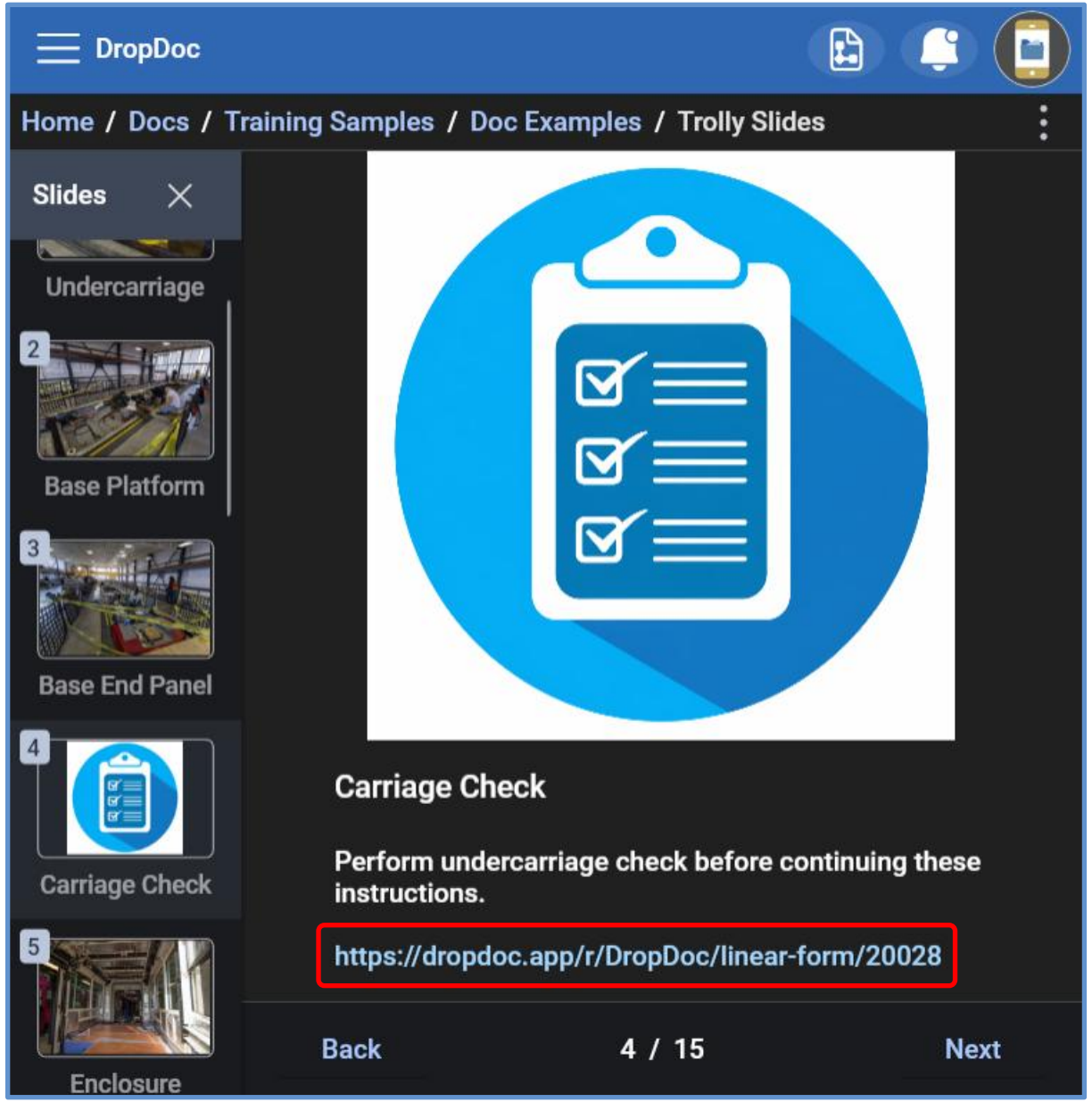
https://www.qrcode-monkey.com/



2.13 Hyperlinks

Clicking on a Hyperlinks can lead viewers to additional resources:

- References
- Instruction Modules
- Checks & Inspections
- Any page on the internet

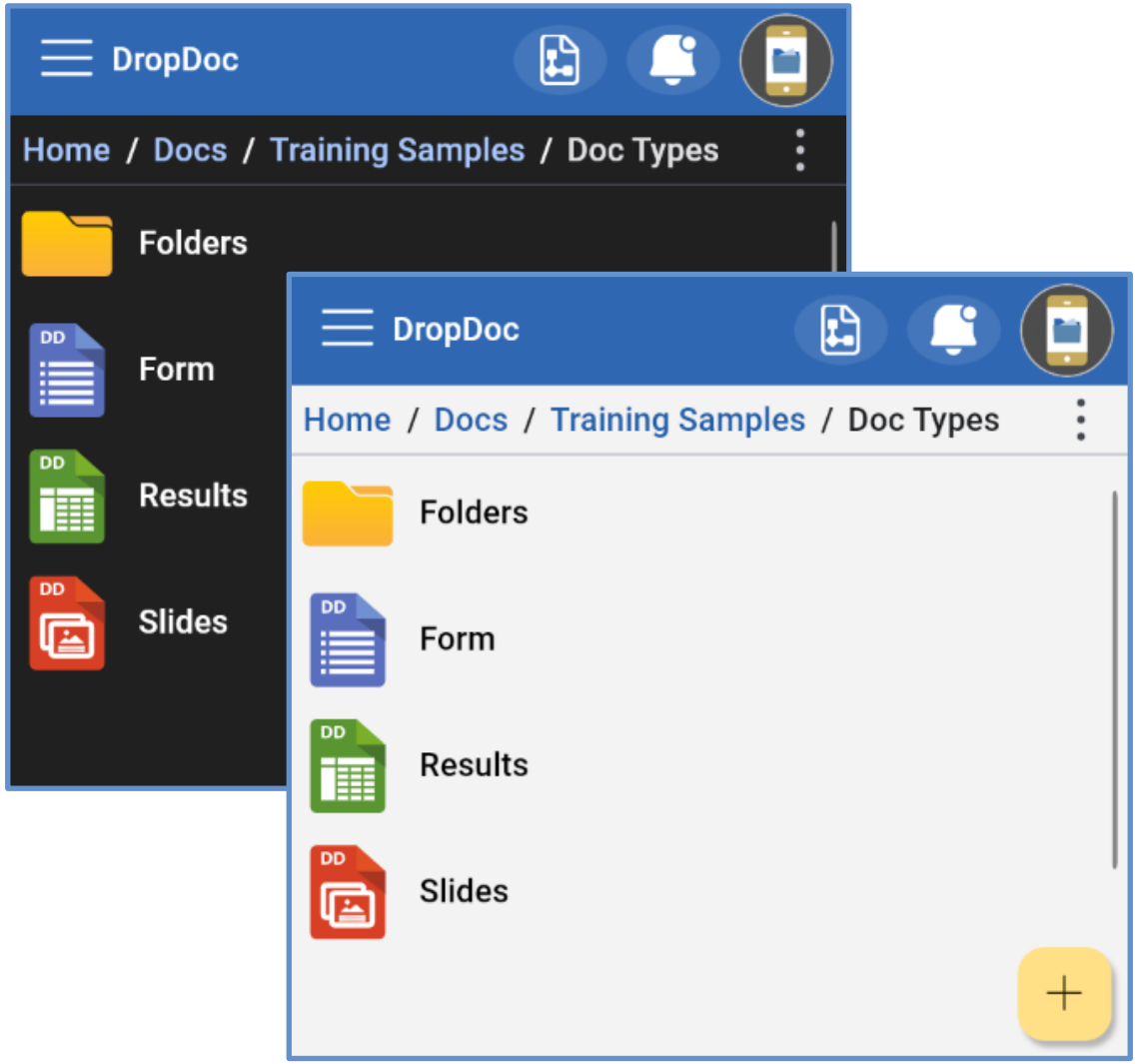


2.14 Light & Dark Mode

- DropDoc switches between Light & Dark mode depending on browser & device settings

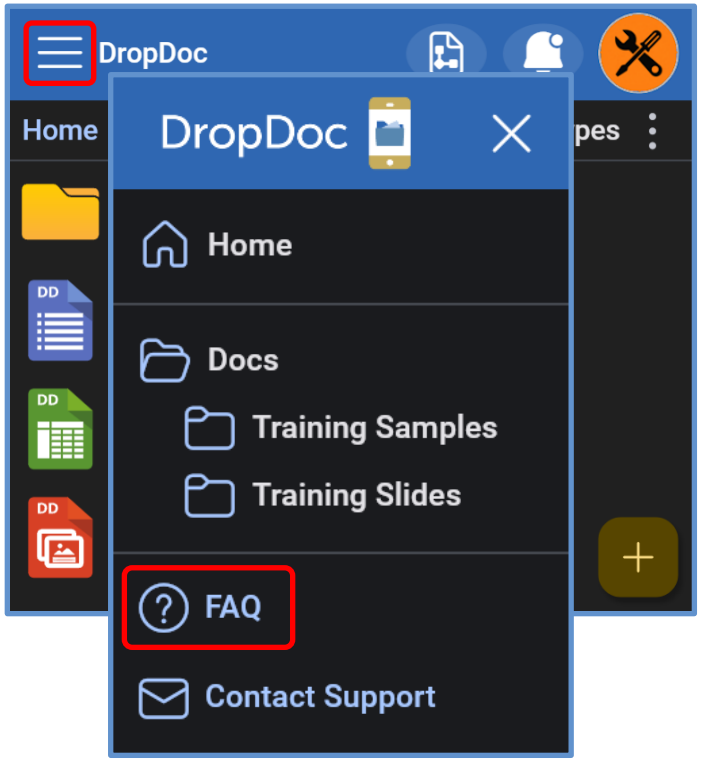
- Typical menu path for updating browser & device settings is:

  Settings / Appearance / Theme



2.15 FAQ & Support

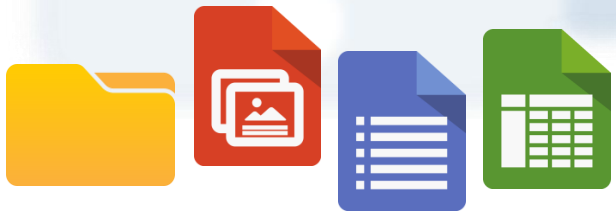
- Frequently Asked Questions (FAQs) are available through the hamburger menu in the top, left corner





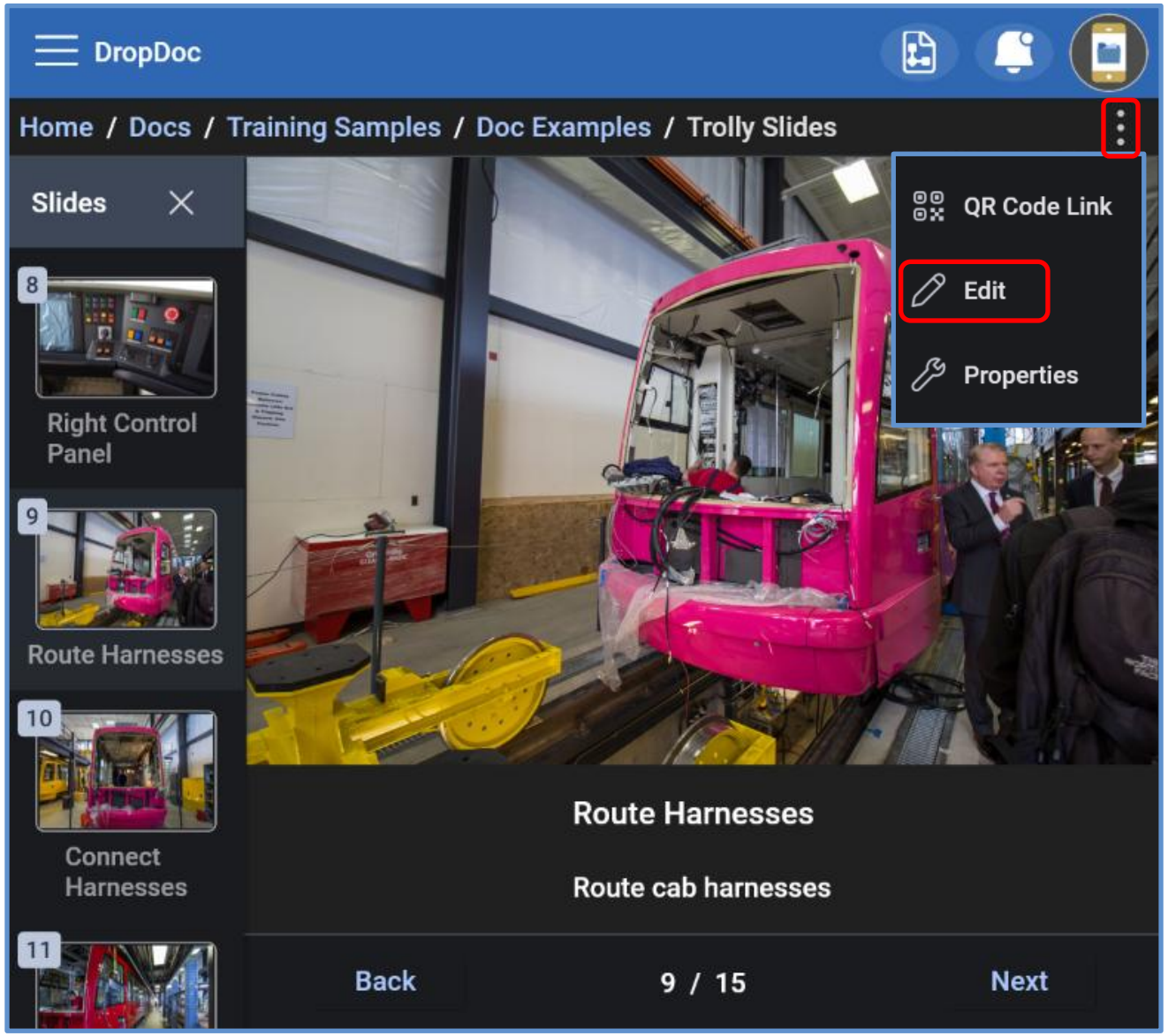
3.0 Doc Editing

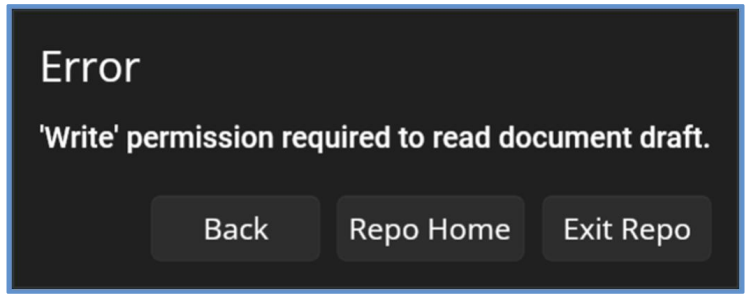
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3.1 Editing Docs

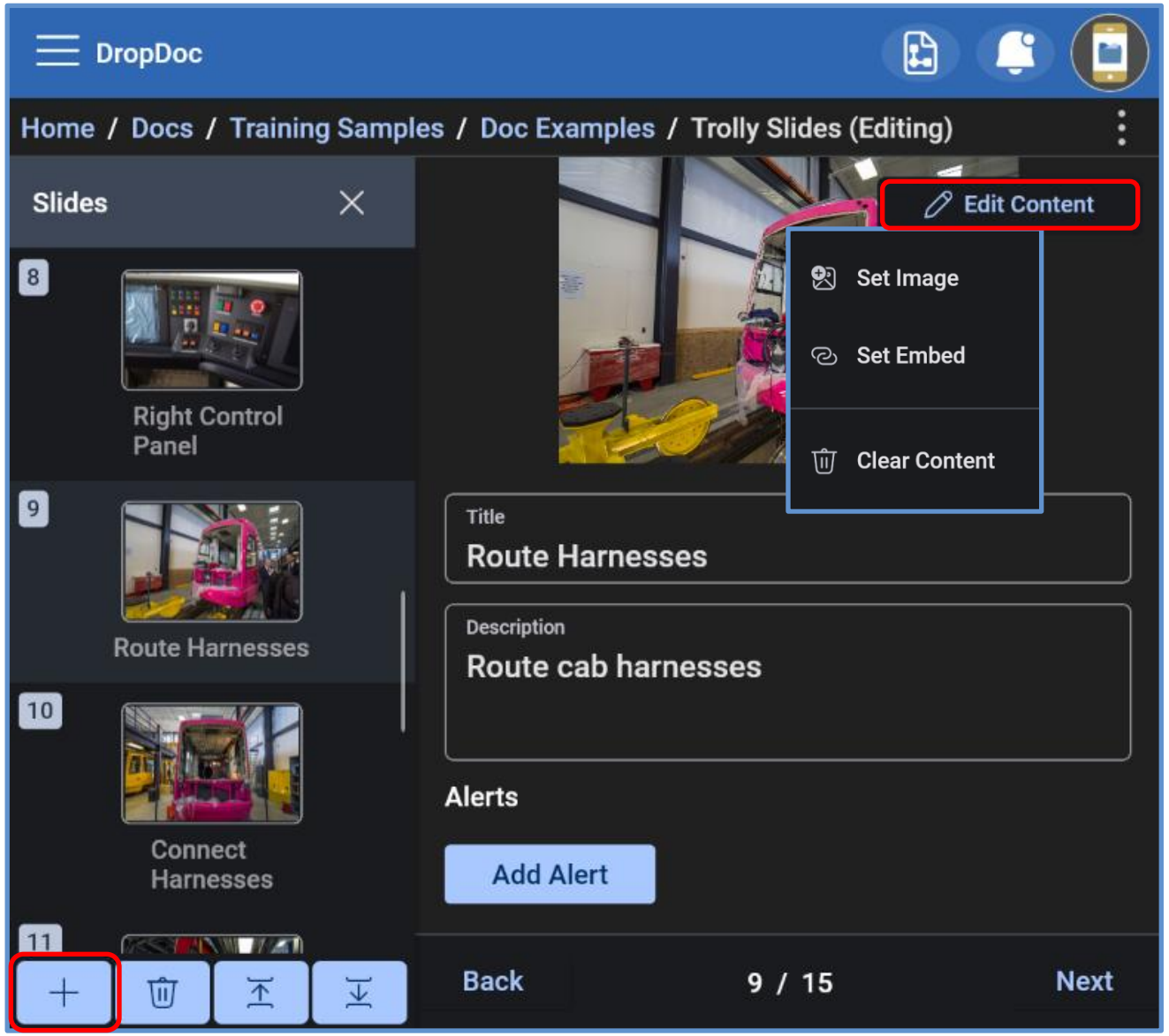
- Use the 3-dot menu in the top, right corner to Edit Docs
- For Write permission, reach out to your organization's administrator





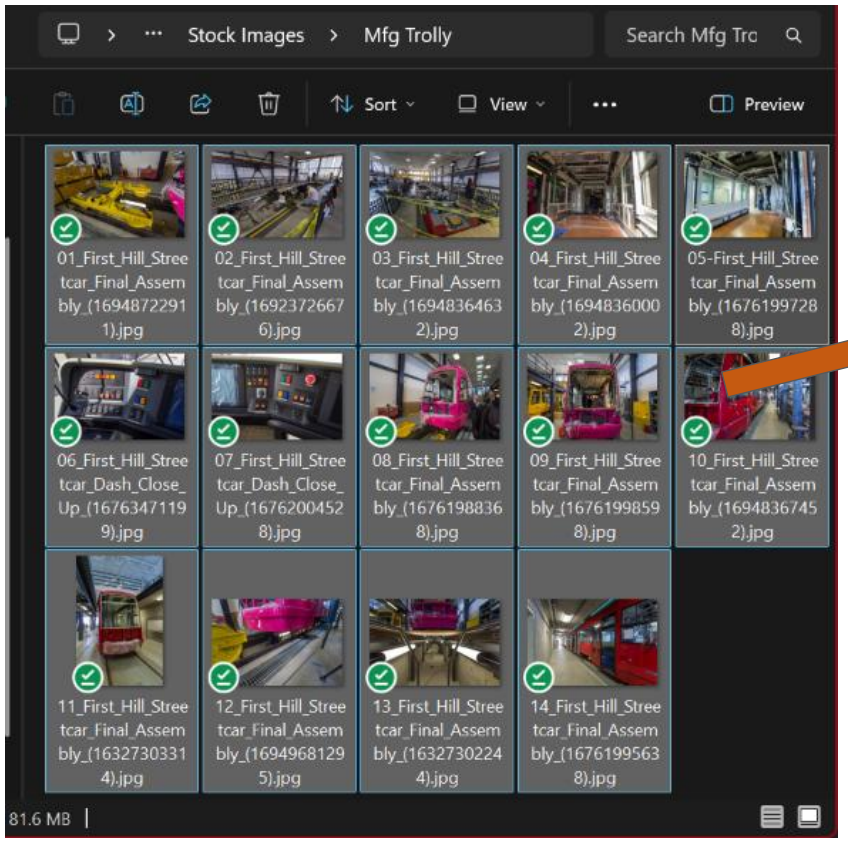
3.2 Add Content

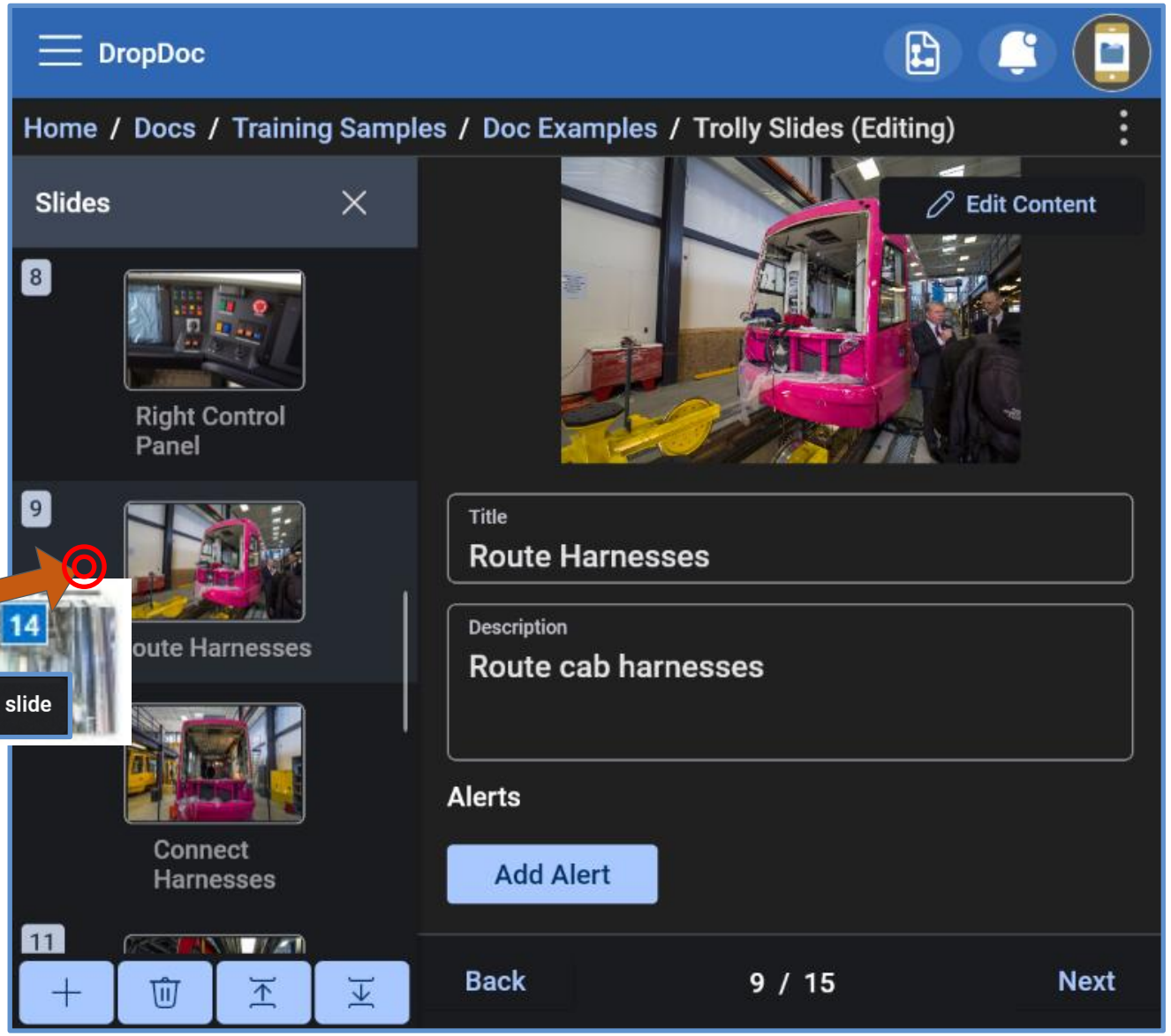
- Add Slides or Form Questions by pressing +
- Use Edit Content to set images or embed videos
- Images can also be copied *(Ctrl+C)* & pasted *(Ctrl+V)*



3.3 Drop in Content

Drag & drop files to add content

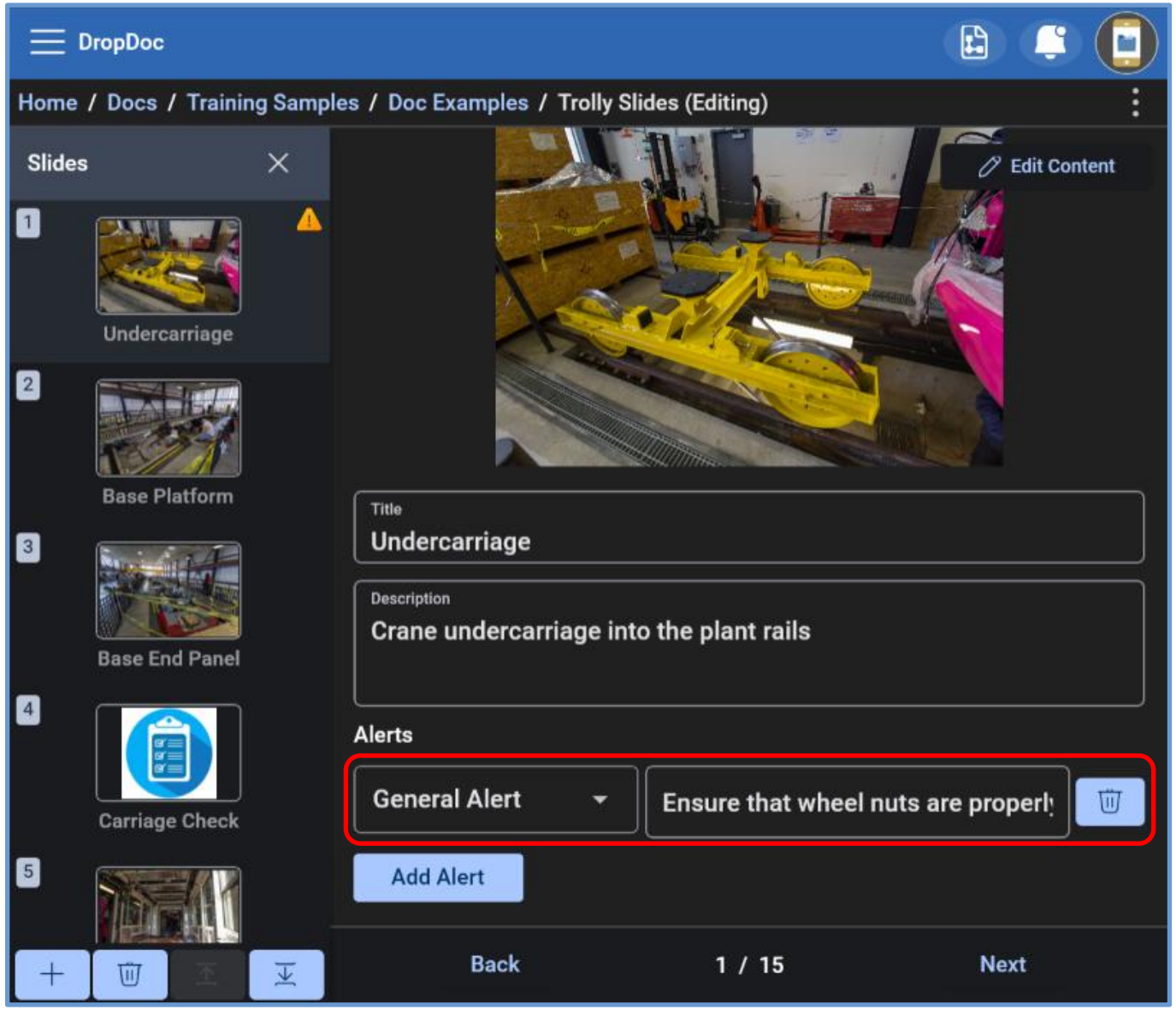




3.4 Add Alerts

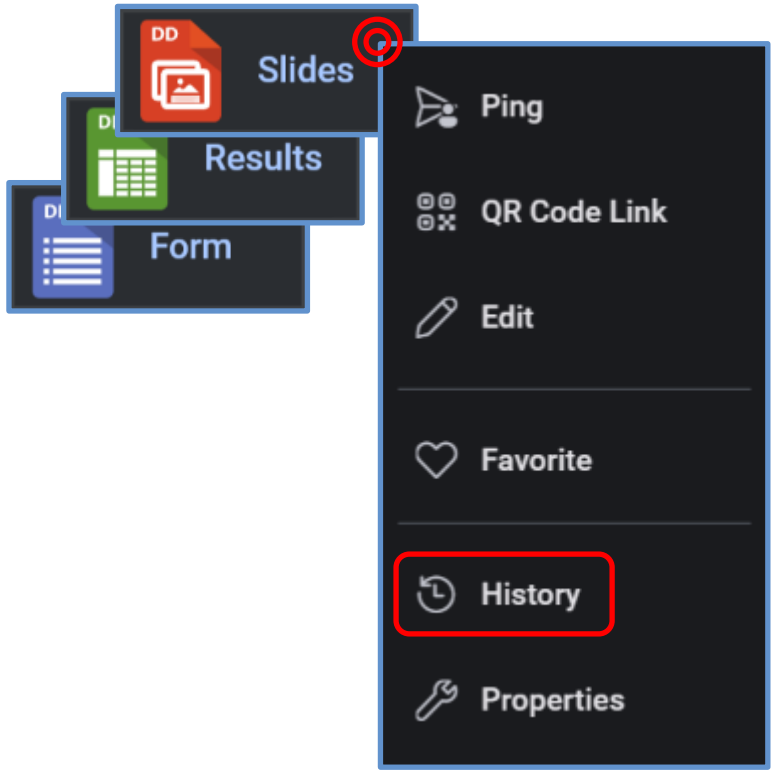
Slides & Form questions can be marked with Alerts for special attention

- **Quality Alert**
  Ensure pin is aligned before inserting.
- **Training Alert**
  Refer to training on pin handling care.
- **Safety Alert**
  Use crane & soft straps to lift pin.
- **Engineering Change Notice**
  Update image to match REV C1.



3.5 Previous Version Drafts

Previous versions of a Doc can be Restored as a new draft, and published as a new Version

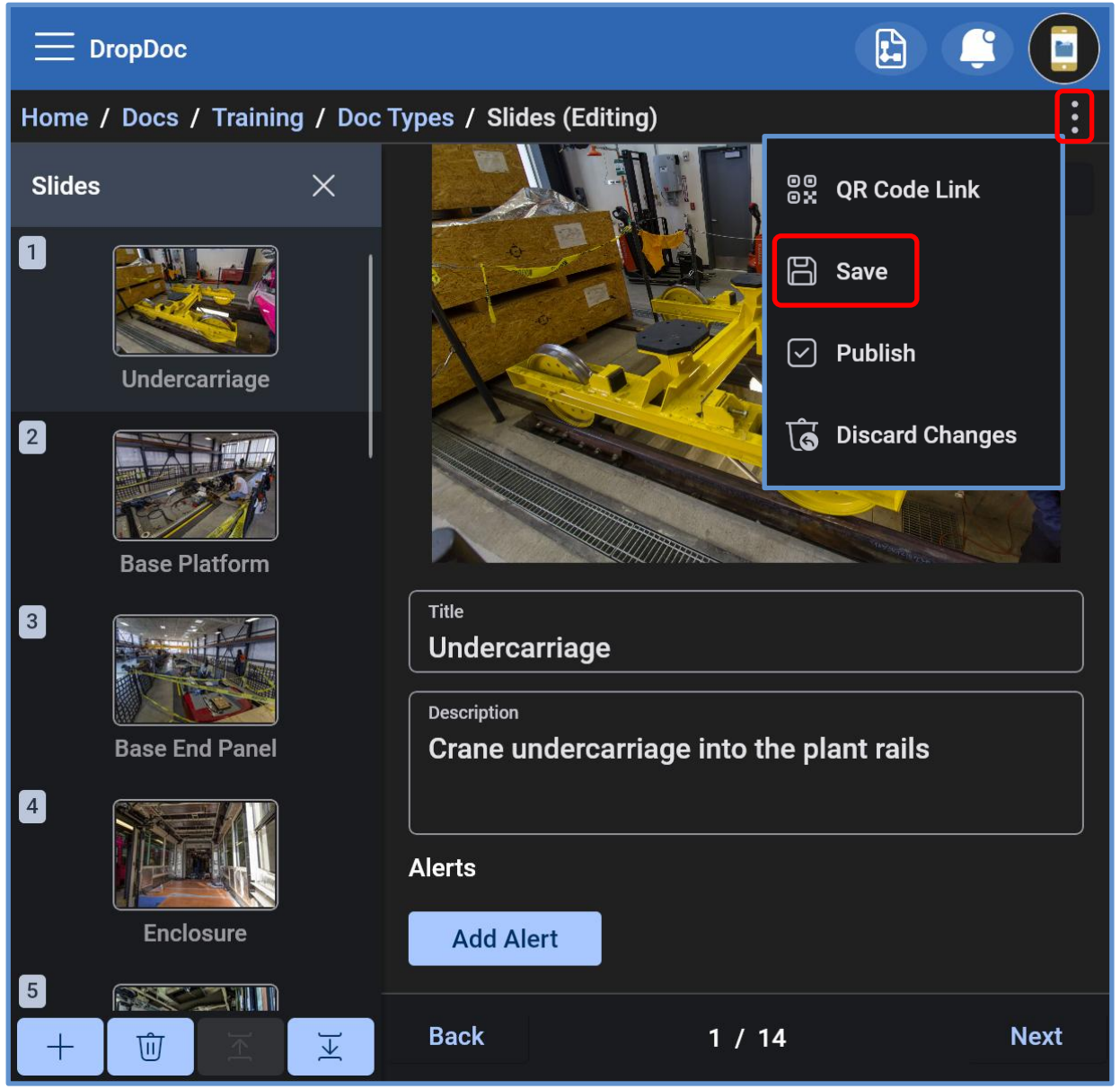


Version	Last Modified	Modified By
13 Latest	08/04/2026 13:41:54	Saša Tepavac
12	08/04/2026 13:41:28	Saša Tepavac
11	01/04/2026 19:50:05	Saša Tepavac
10	14/03/2026 18:28:24	Saša Tepavac
9	14/03/2026 18:27:20	Saša Tepavac

Version	Last Modified	Modified By	Actions
12 Latest	08/04/2026 13:41:28	Saša Tepavac	Diffs Delete Restore
11	01/04/2026 19:50:05	Saša Tepavac	Diffs Delete Restore
10	14/03/2026 18:28:24	Saša Tepavac	Diffs Delete Restore
9	14/03/2026 18:27:20	Saša Tepavac	Diffs Delete Restore

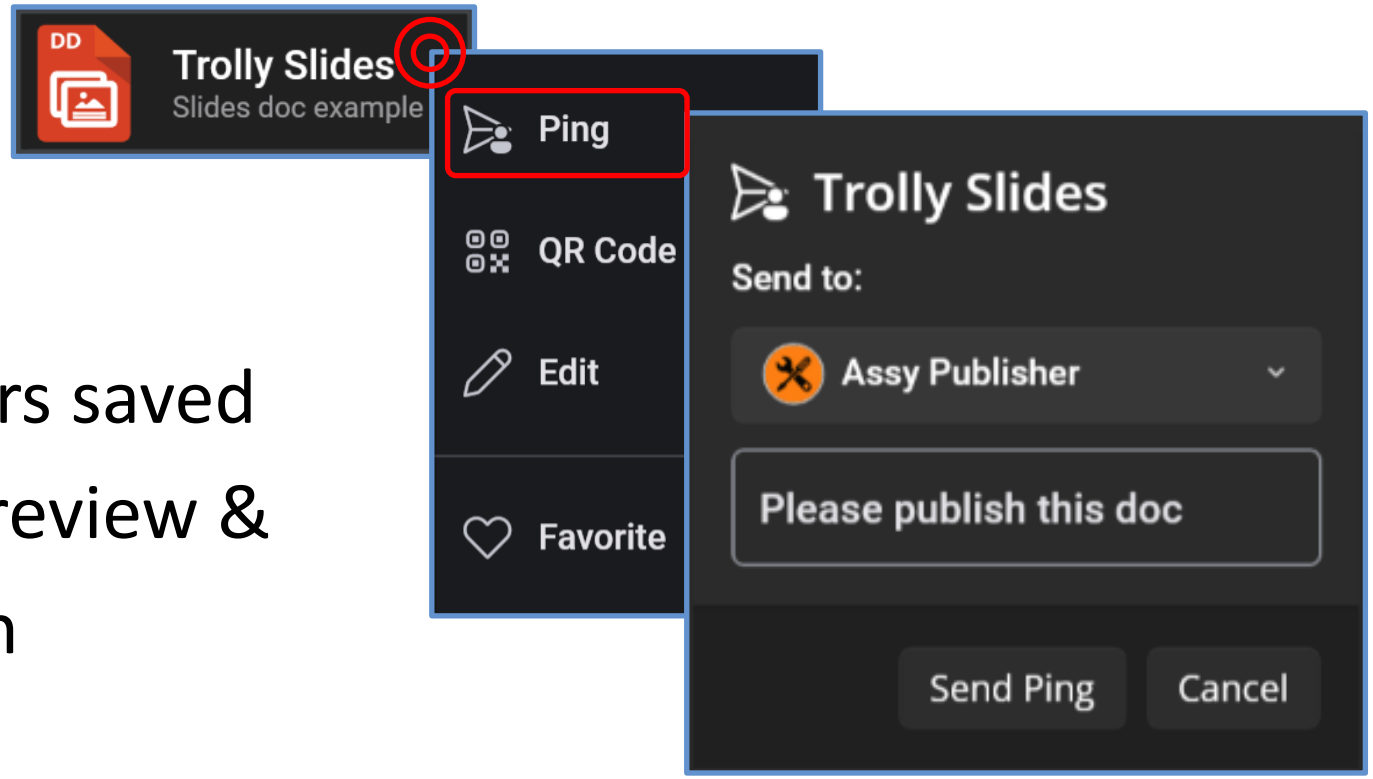
3.6 Doc Drafts

- Use 3-dot menu to Save a draft
- When multiple users edit the same Doc, the most recently saved draft will overwrite other active drafts
- See next slide for Pinging to Publish



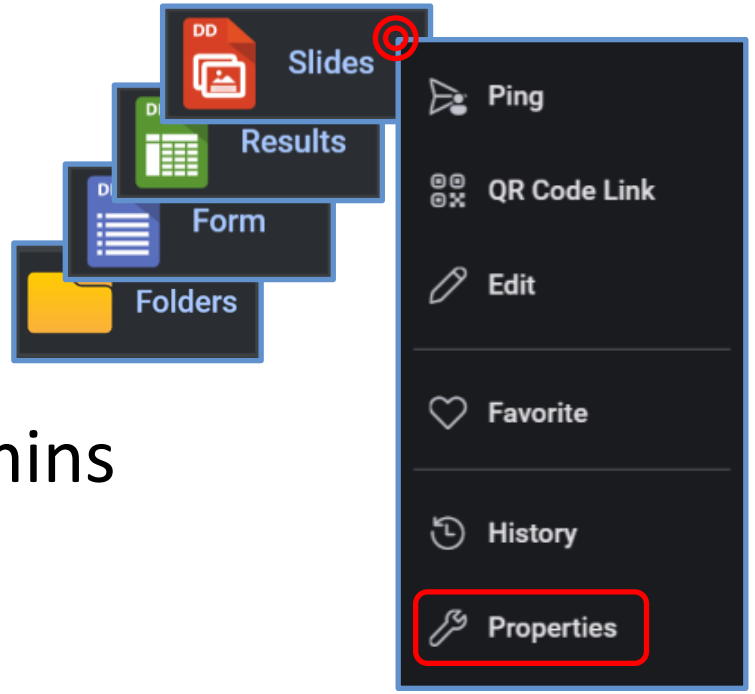
3.7 Pinging to Publish

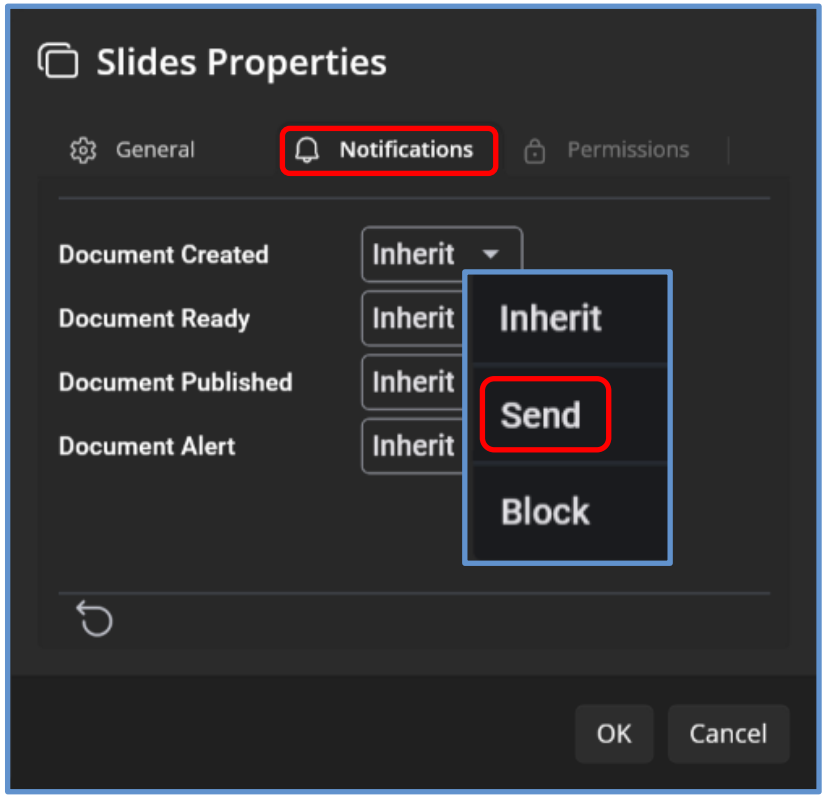
Editors can Ping Publishers saved drafts that are ready for review & released as a new version



3.8 Subscribing to Notifications

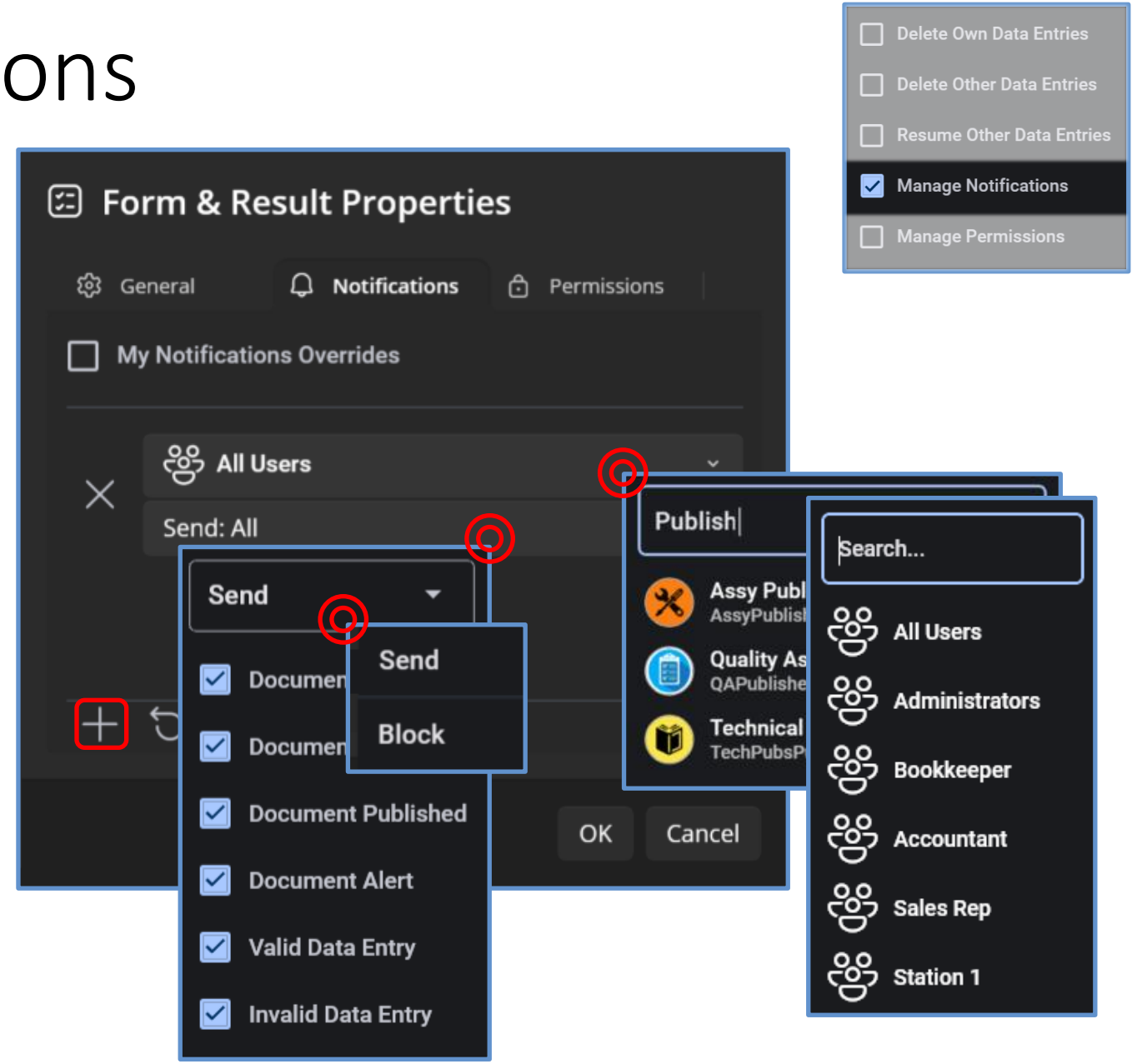
- Notification can be set in the Properties menu for a Folder or Doc
- Notifications can be set to Send, Block or Inherit notifications
- Inherit settings are defaults set by org admins





3.9 Setting Notifications

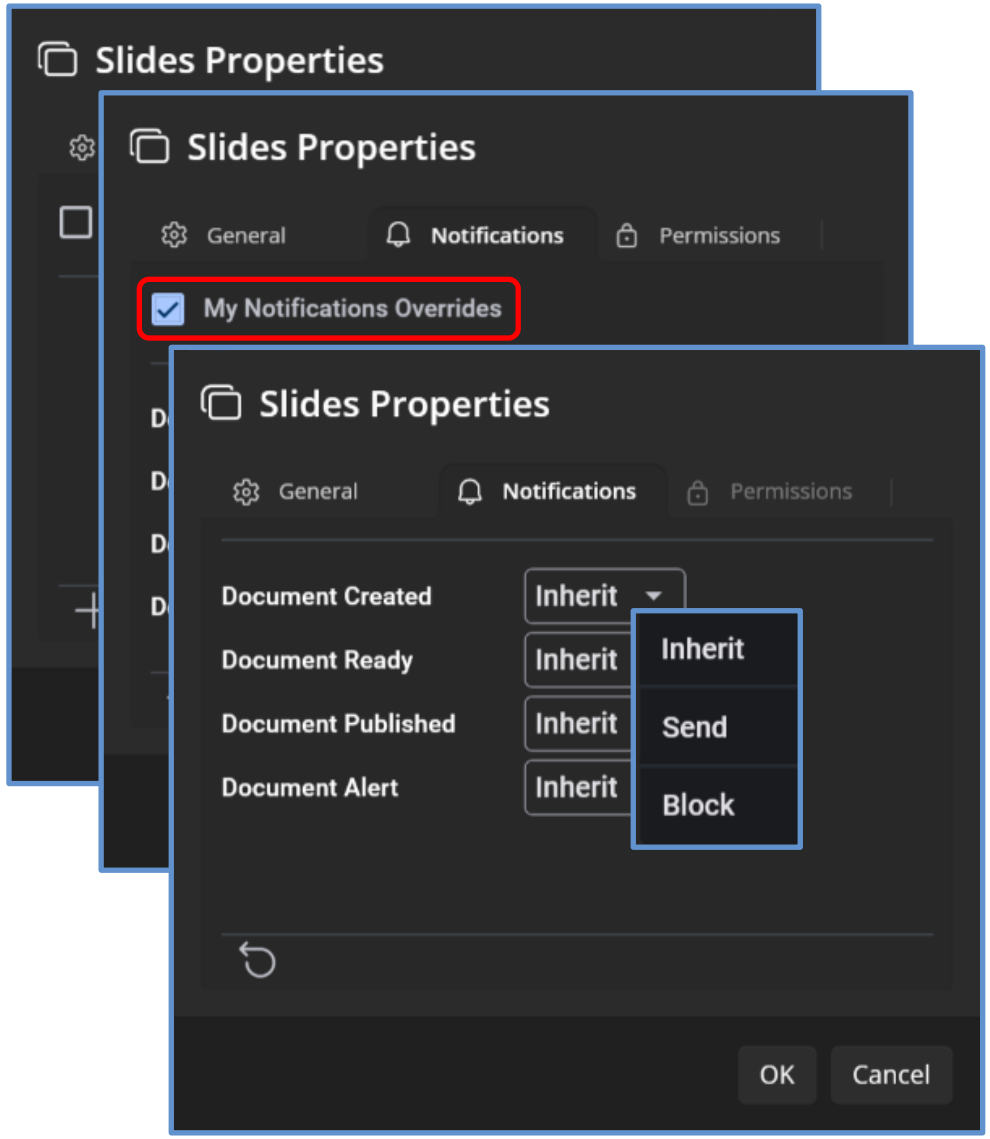
- With permission to Manage Notifications, default subscriptions can be set for Roles & Users
- For organizations, best practice is to apply Notifications & Permissions to Roles instead of Users



3.10 Slide Notifications

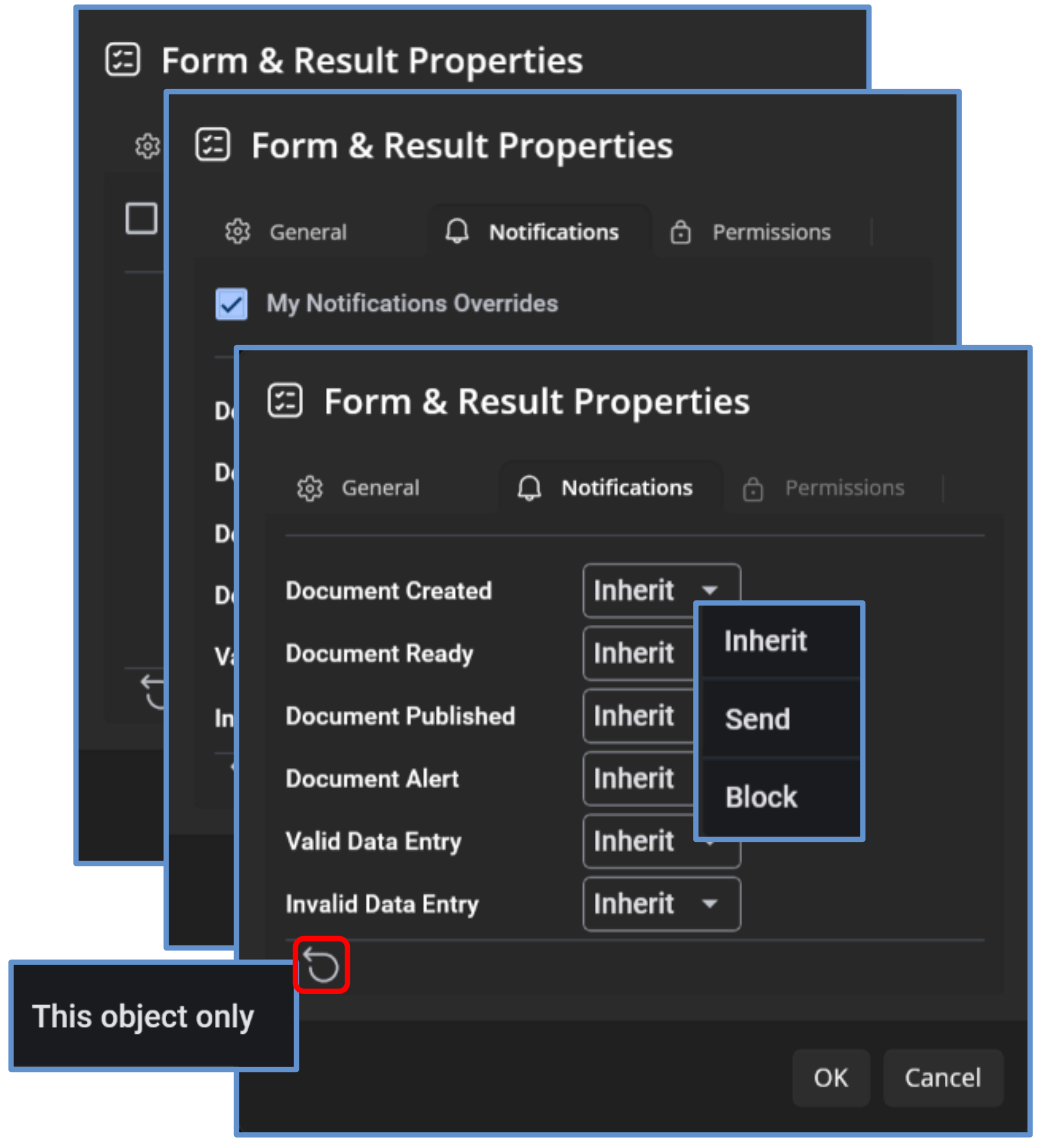
- Users can Subscribe to get notified any time a Doc is created, updated or has a flagged Alert
- For users with Manage Notifications permission, the 

option needs to be checked off to see Inherit notifications



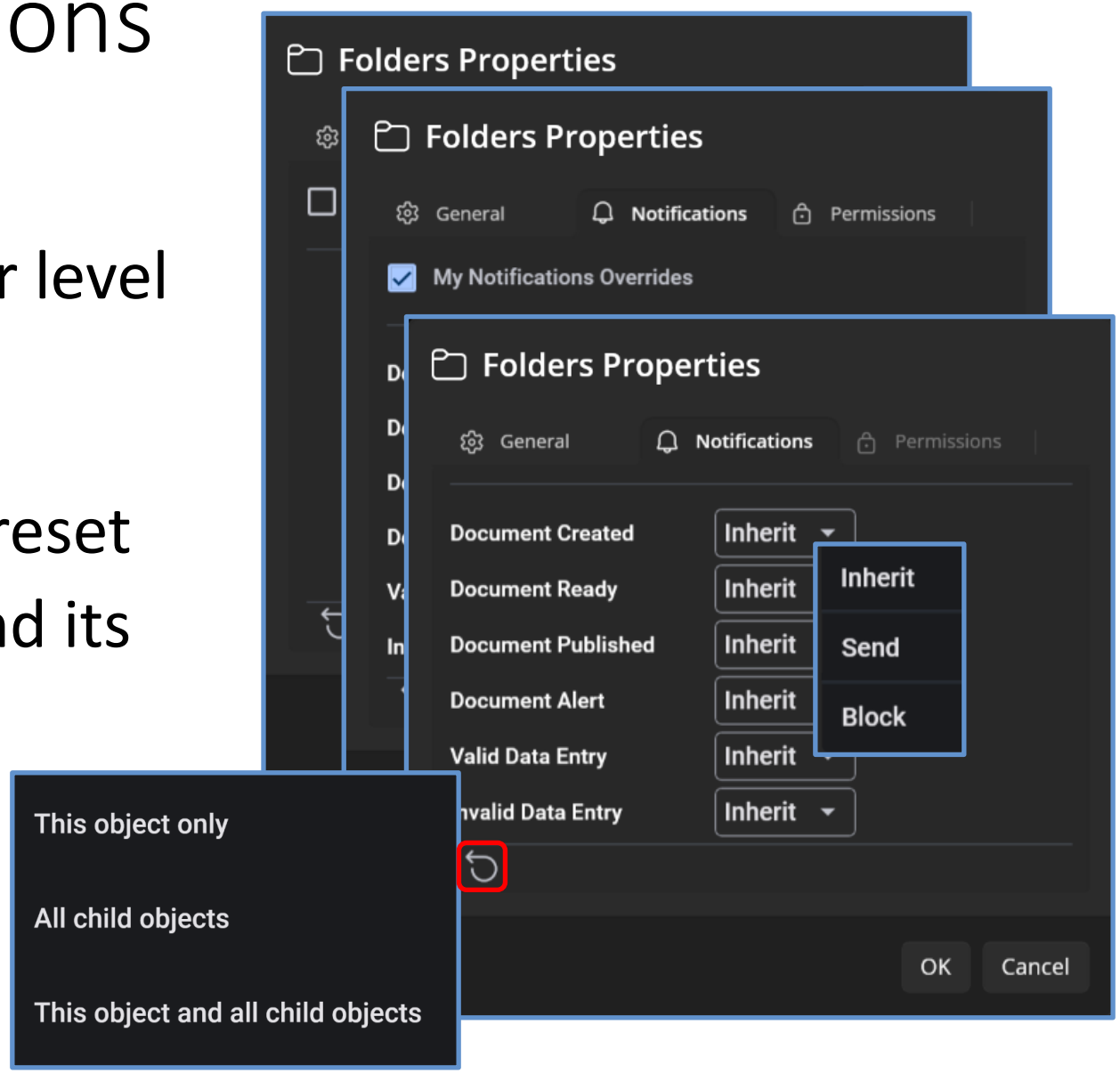
3.11 Form Notifications

- Form Docs have additional notification options for data entry & validation
- The button can be used to reset all notifications for the Doc



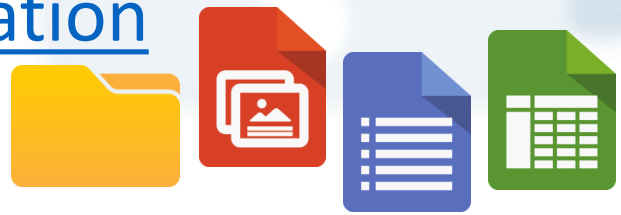
3.12 Folder Notifications

- Notifications can be set at Folder level for all Doc types
- The button can be used to reset all notifications for the Folder and its contents



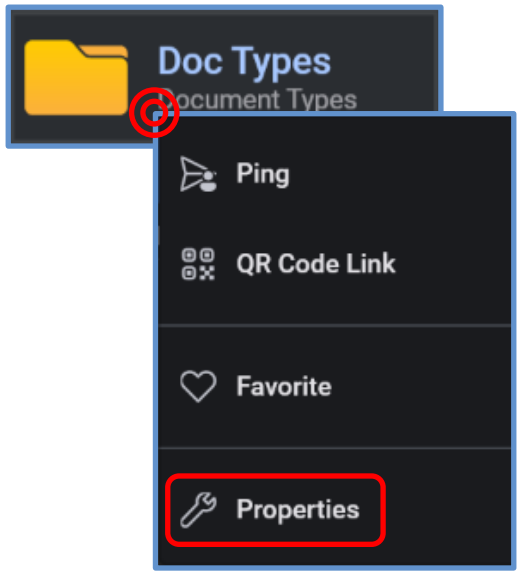
4.0 Doc Publishing

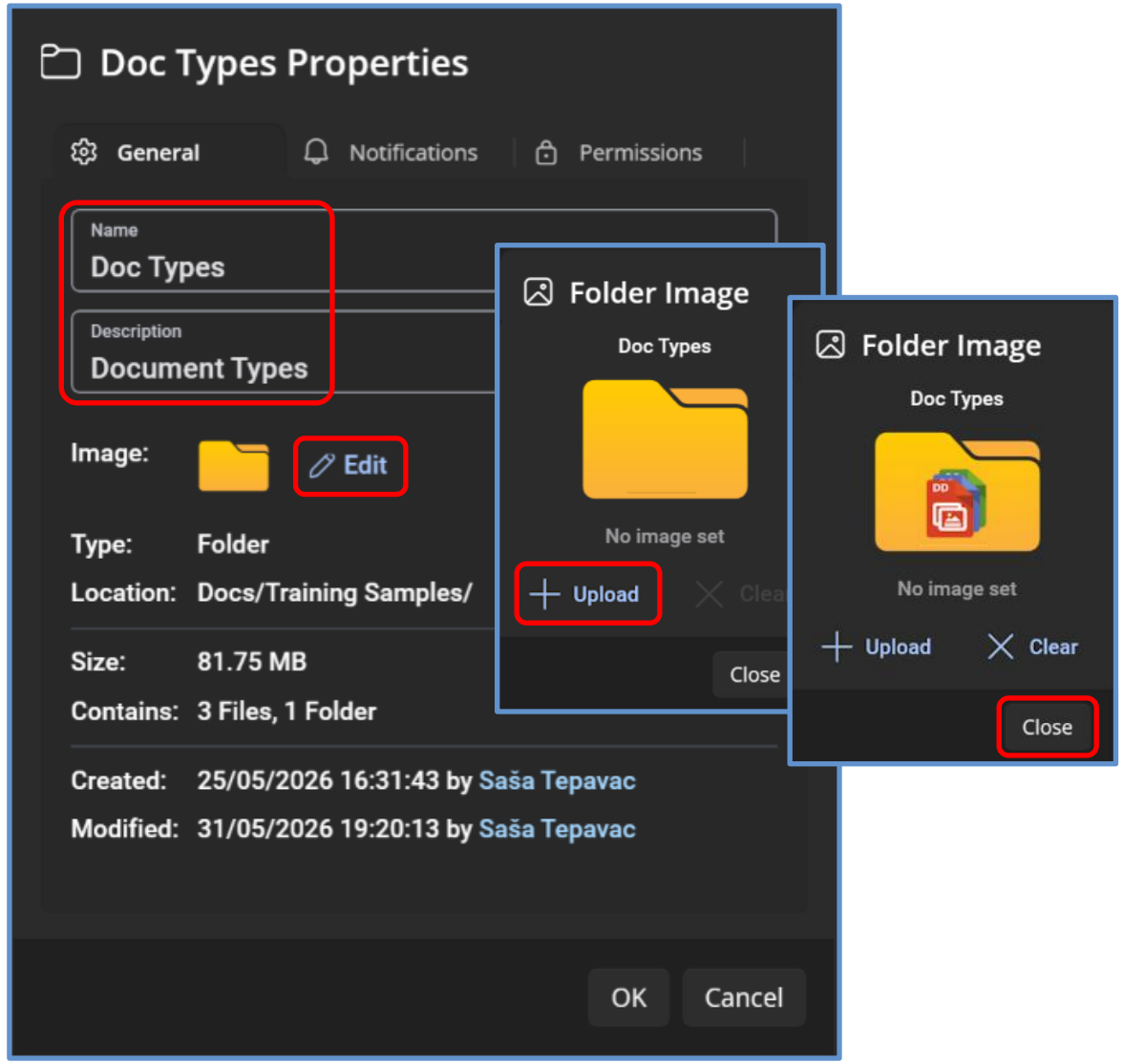
4.1 Folders Properties
4.2 Doc Properties
4.3 Publishing Docs
4.4 Version Control
4.5 Editing Forms
4.6 References & Context
4.7 Questions & Validation
4.8 Required Qs & Workflow IDs
4.9 Comments & Attachments
4.10 Workflow Forms
4.11 Workflow Structure
4.12 Creating Results
4.13 Exporting Results



4.1 Folder Properties

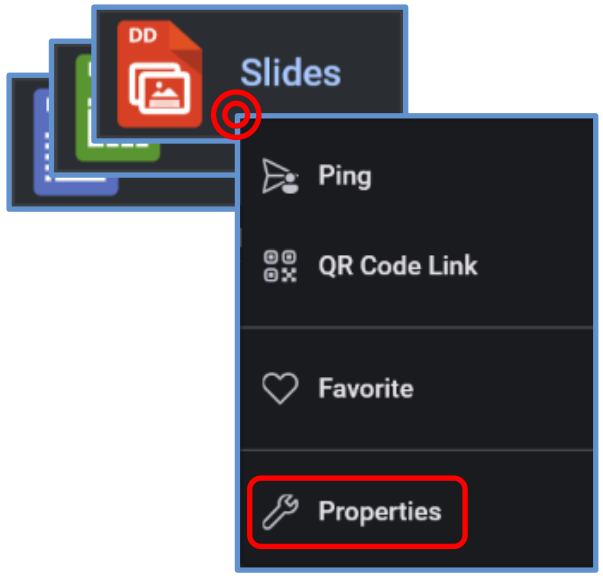
- Edit Doc info, Notifications & Permissions
- Add Images to distinguish Folders

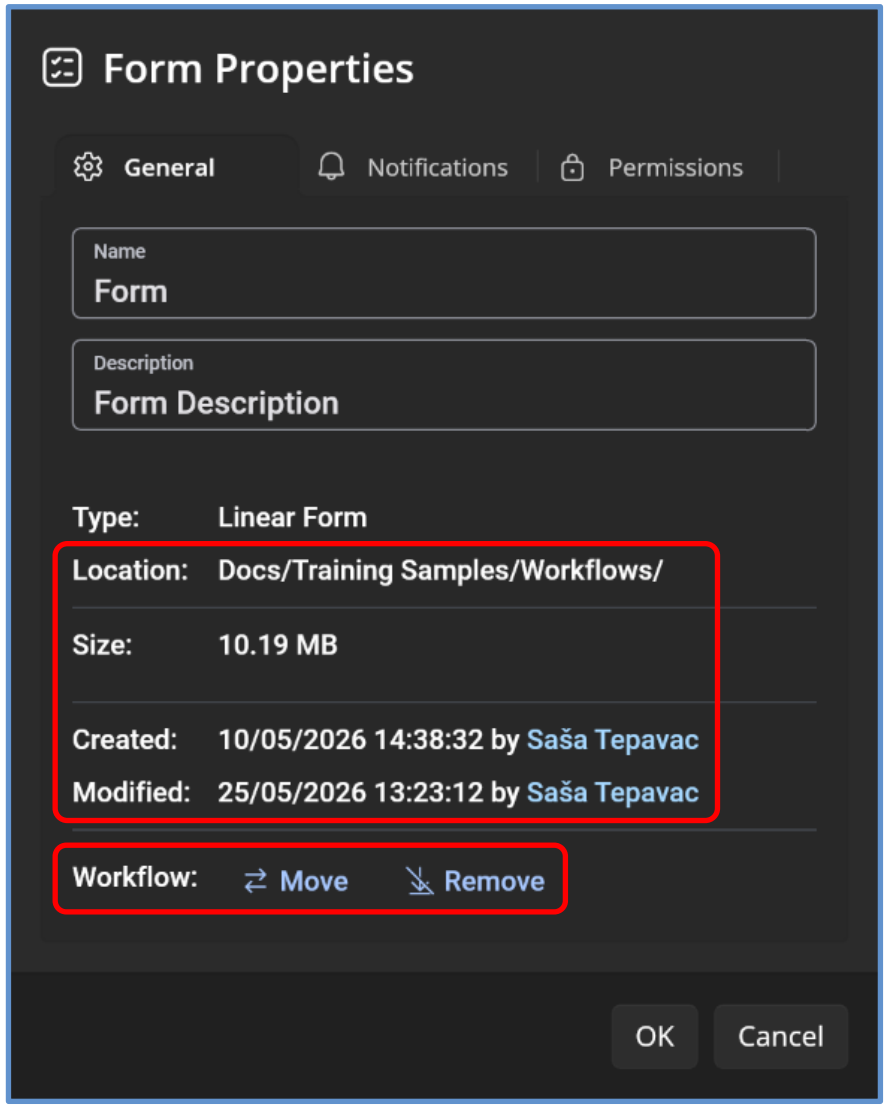




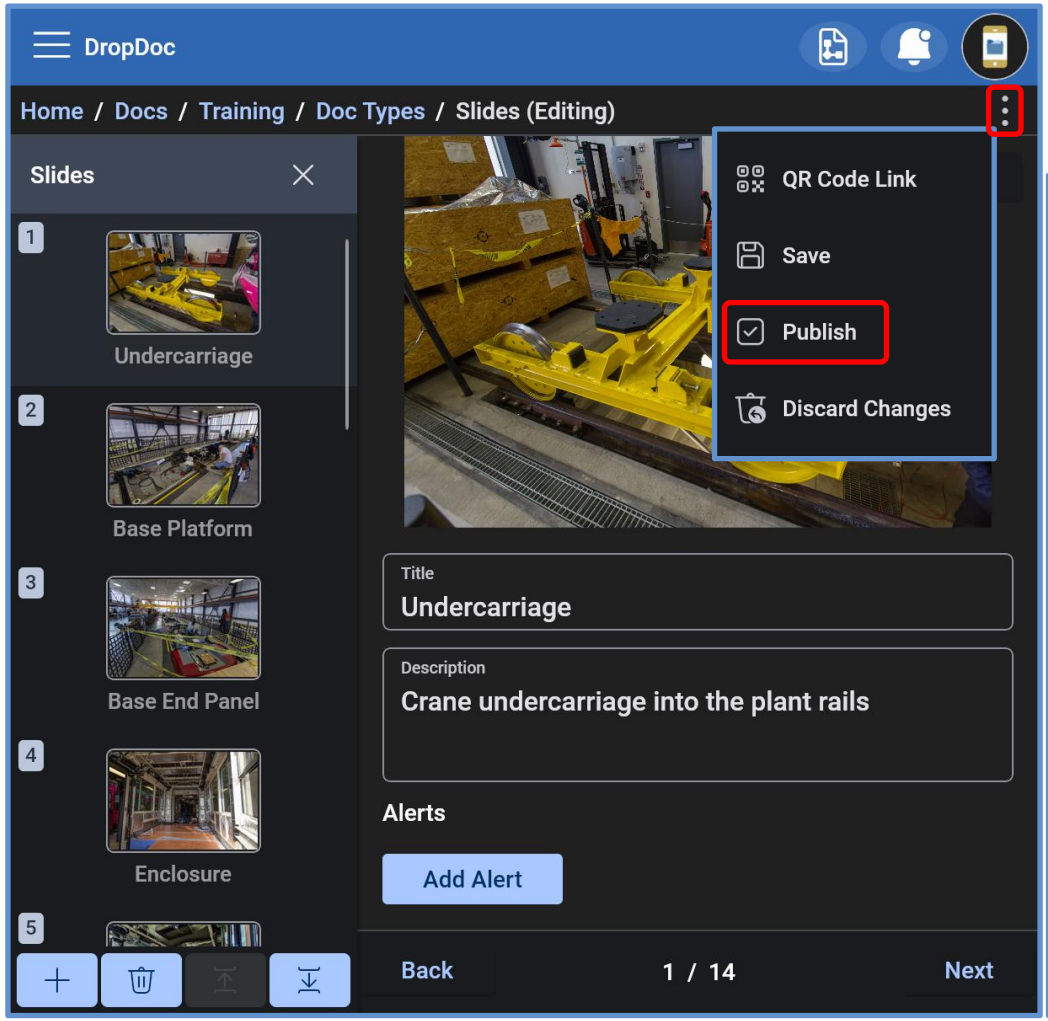
4.2 Doc Properties

- Review Doc size, location & other details
- Move or remove Forms that are in a Workflow

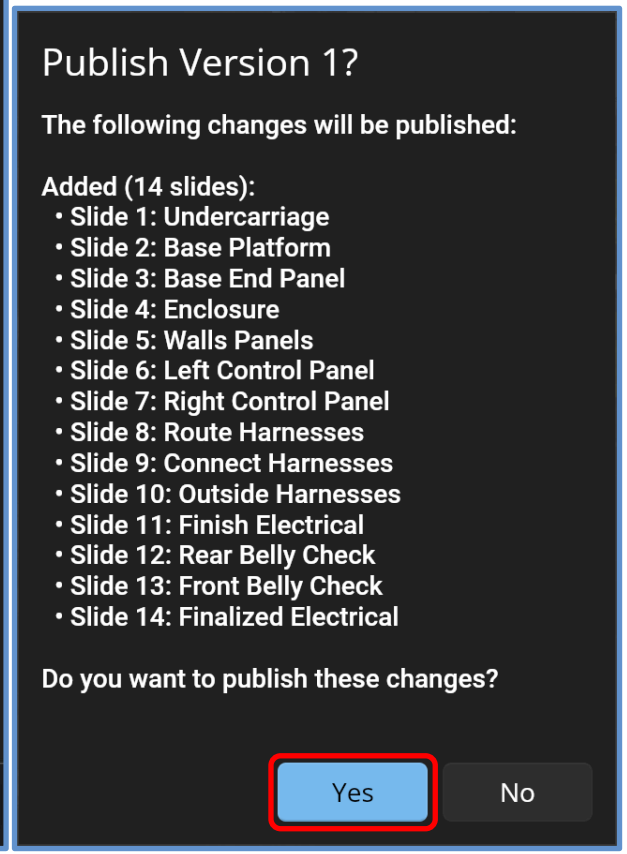




4.3 Publishing Docs



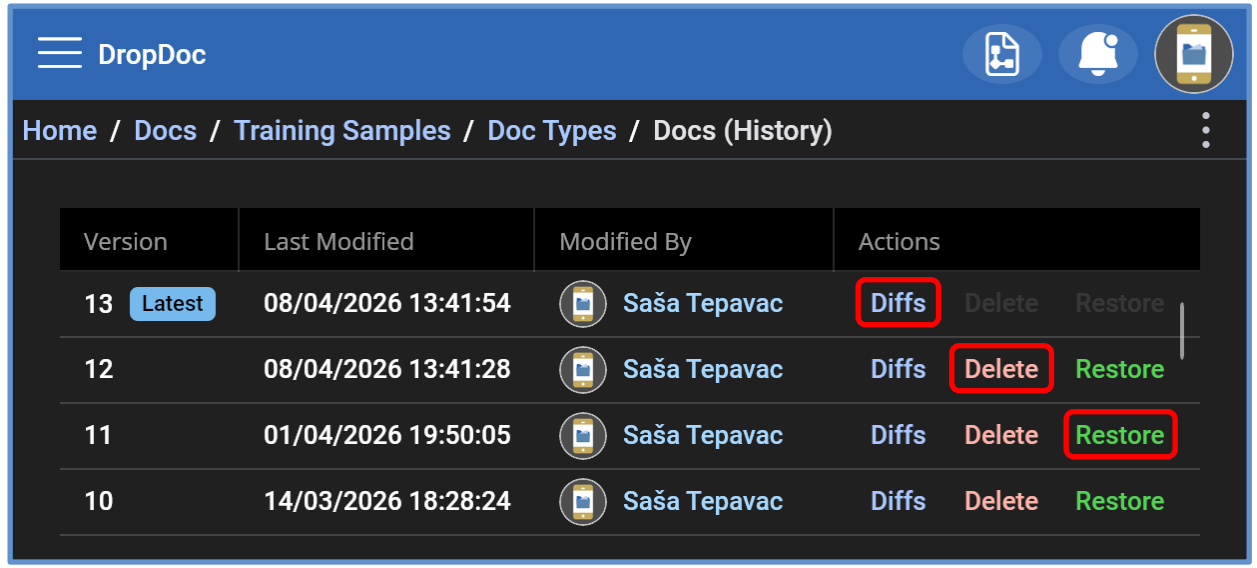
- Docs can be Published from Edit mode using the 3-dot menu

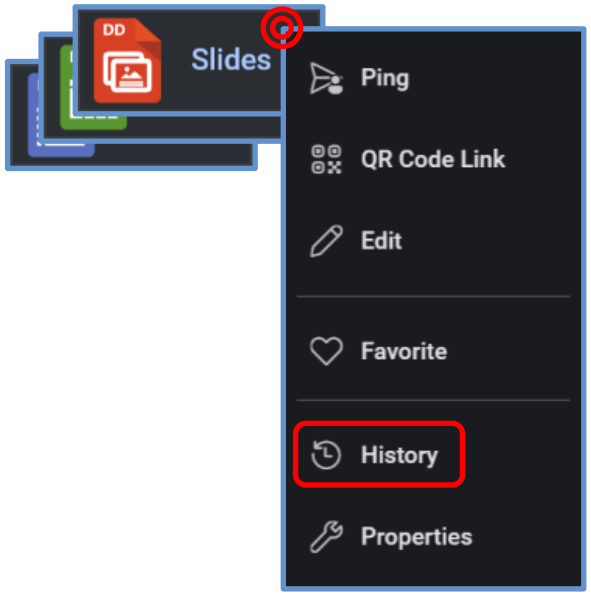


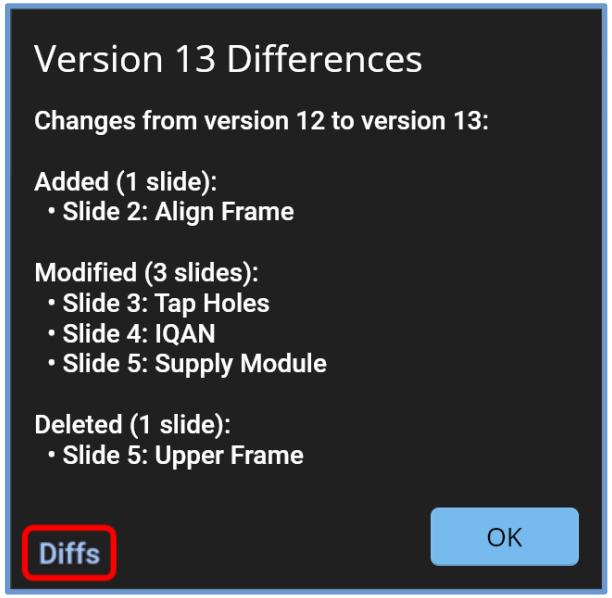
- The change log shows a list of added, modified & deleted content compared to the previously published version

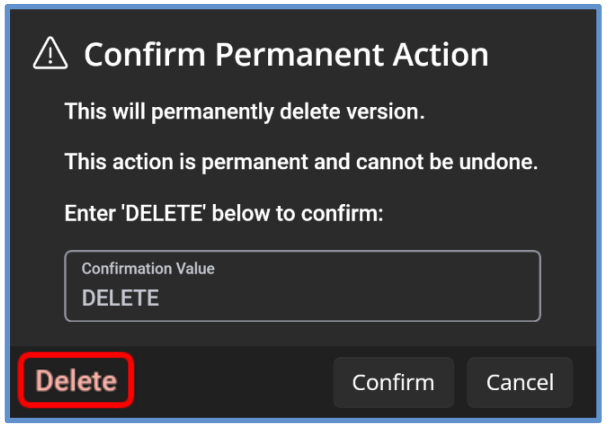
4.4 Version Control

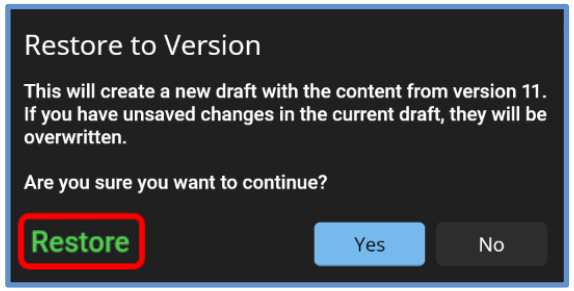
- Doc History shows versions that can be Restored or Deleted
- The Differences Action shows what was changed for each version









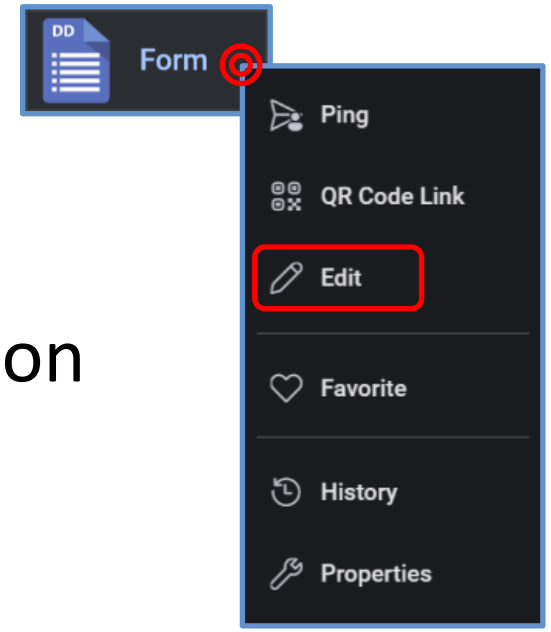


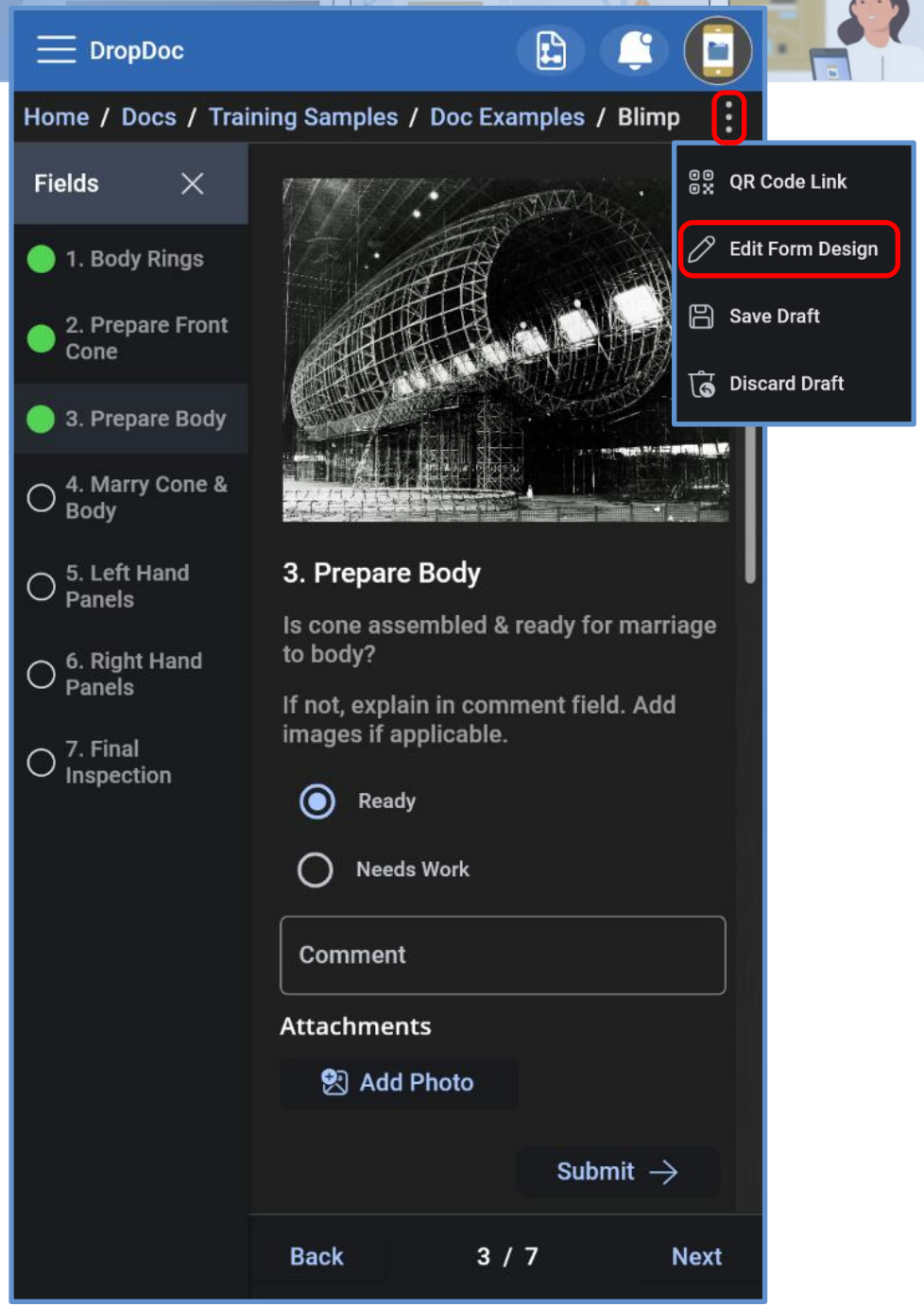
4.5 Editing Forms

- Use the 3-dot menu inside a Form to Edit Form Design

OR

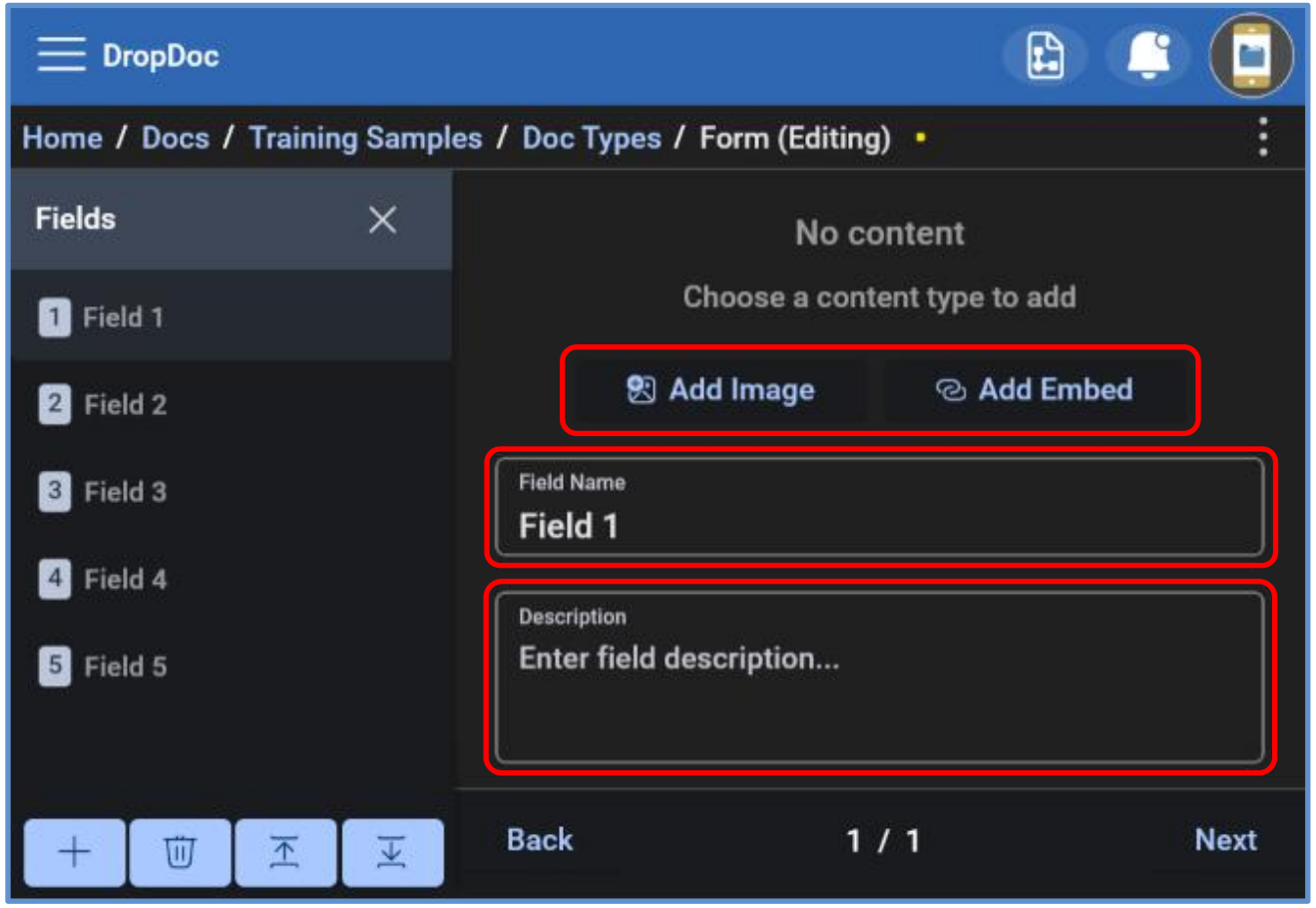
- Long press or right click on Form to find the Edit option





Ref 2.3 – Filling Forms

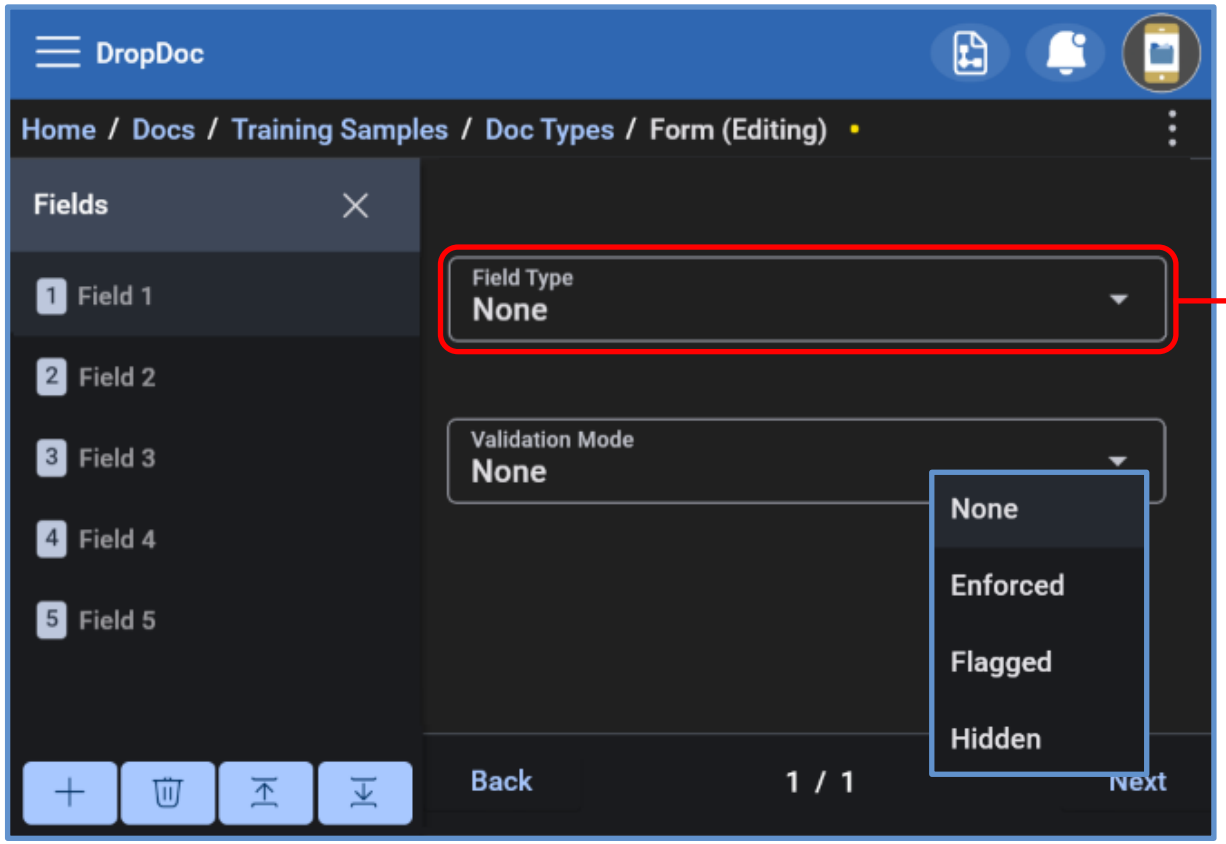
4.6 References & Context

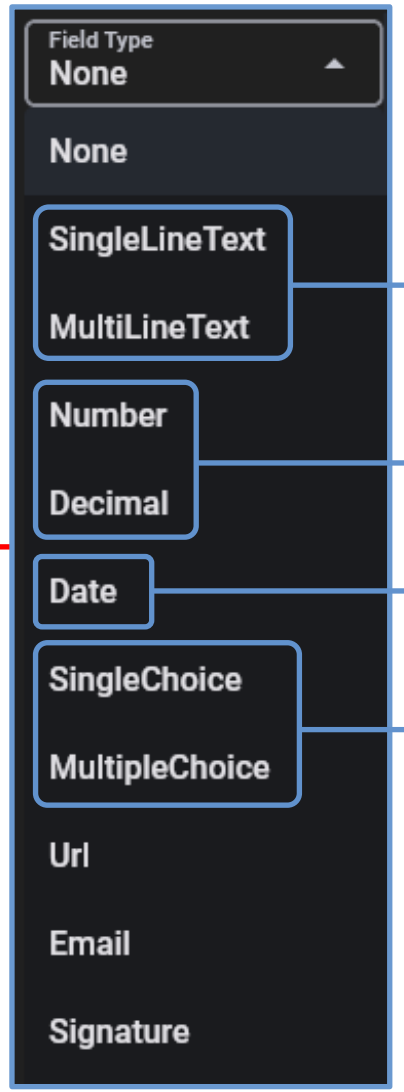


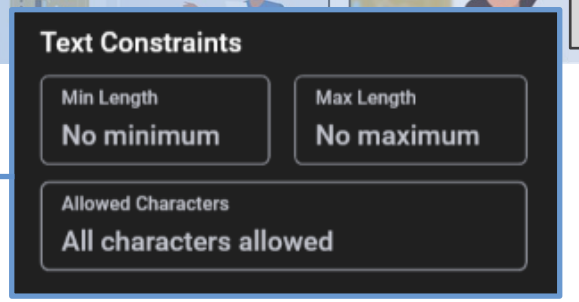
- Reference media can be uploaded or a web link can be embedded
- Field Names are shown in the side panel and as column headers in Result Sheets
- Description can use long text to explain the question

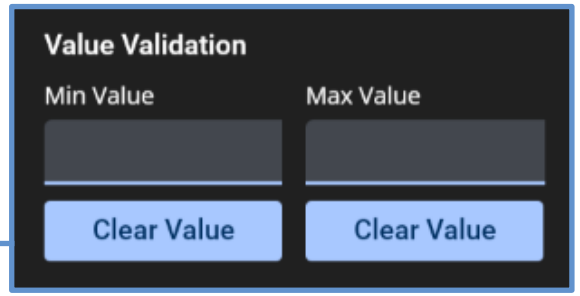
4.7 Questions & Validation

Multiple types of question options, each with their own validation control

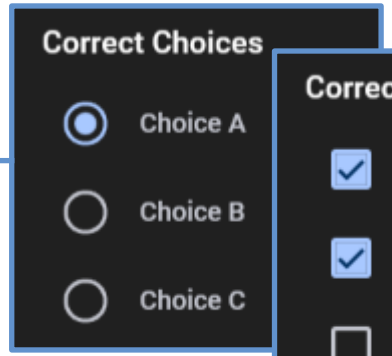


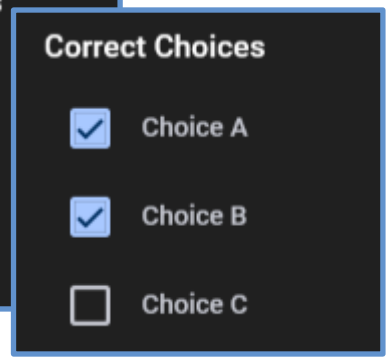




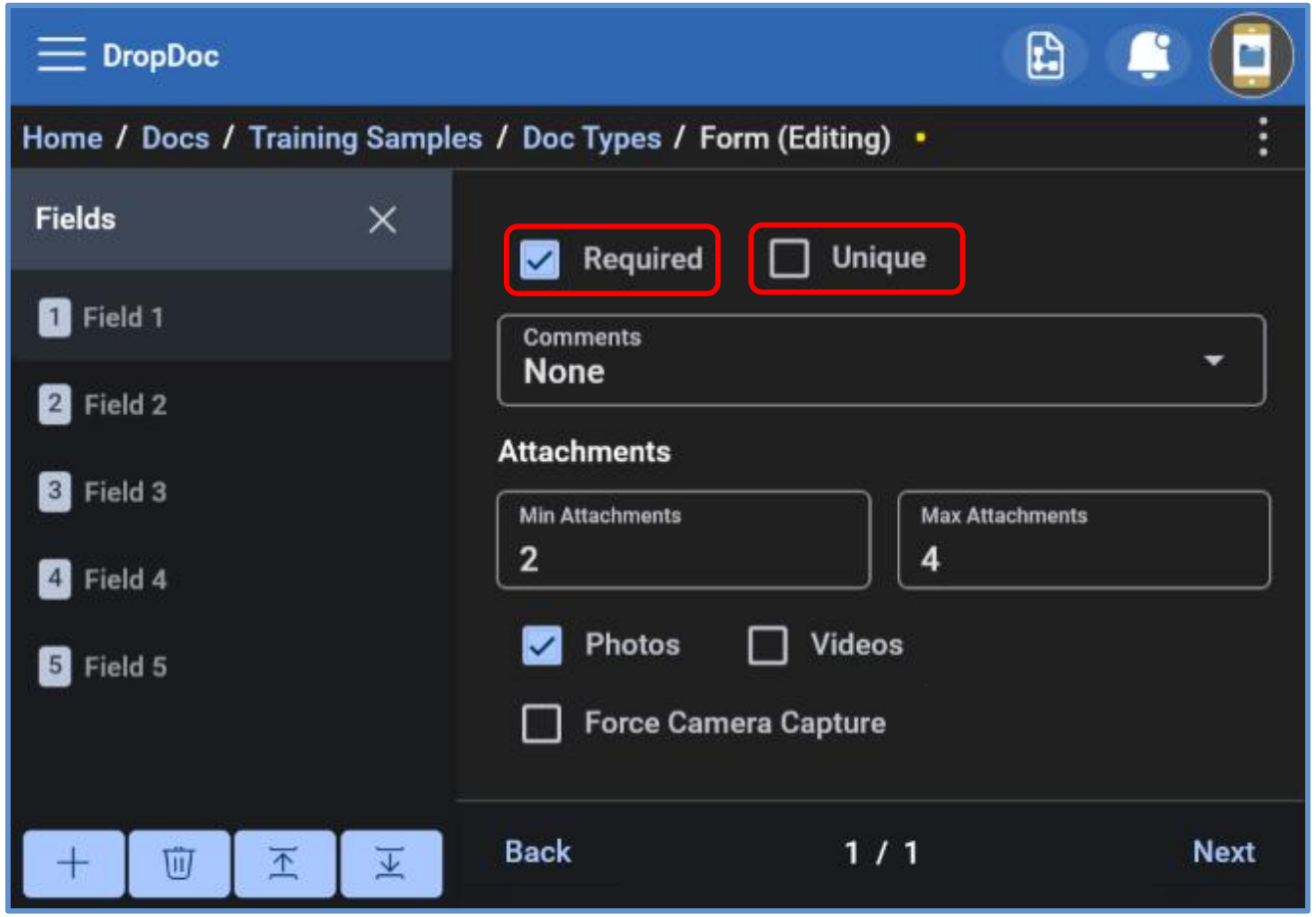






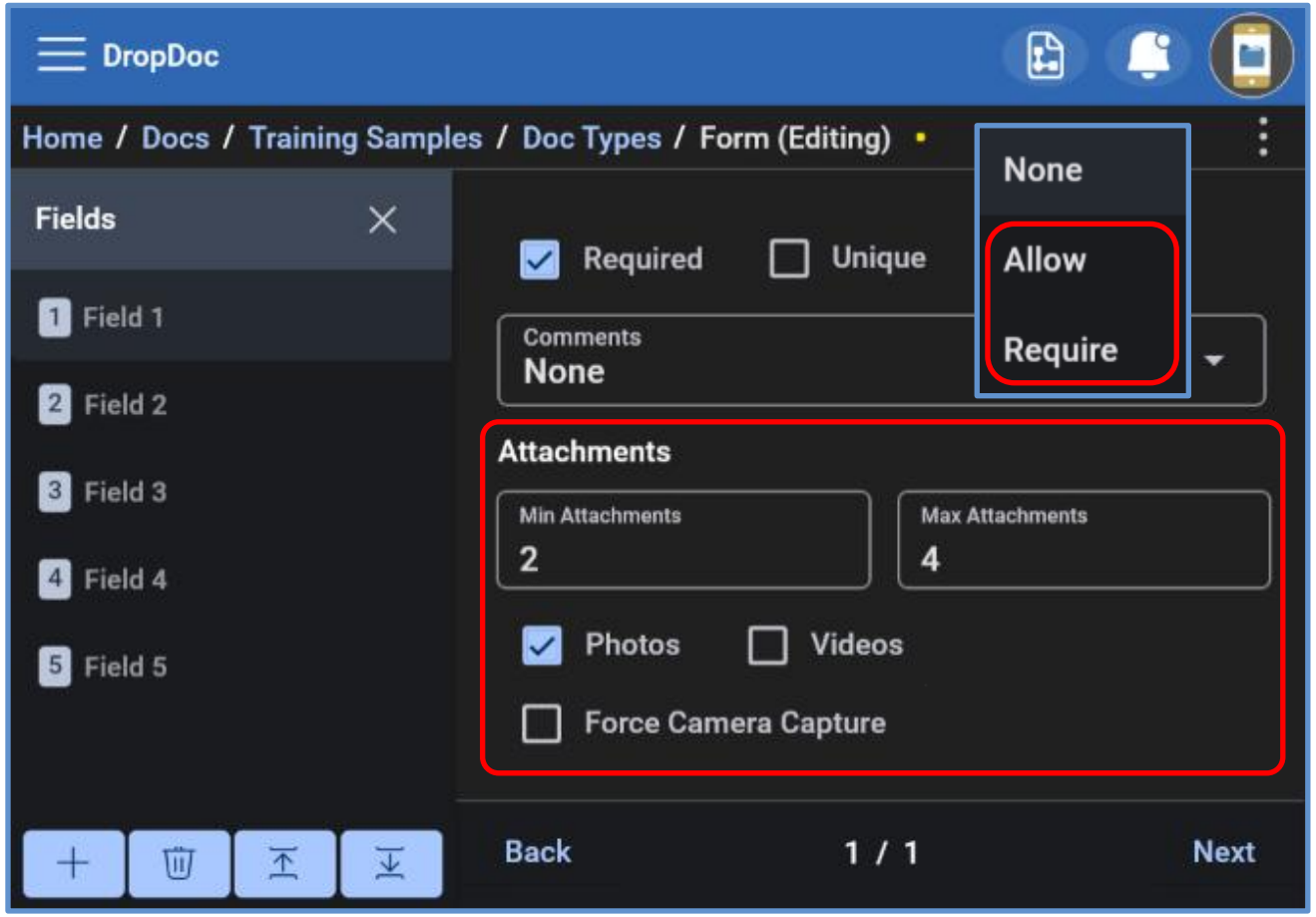


4.8 Required Qs & Workflow IDs



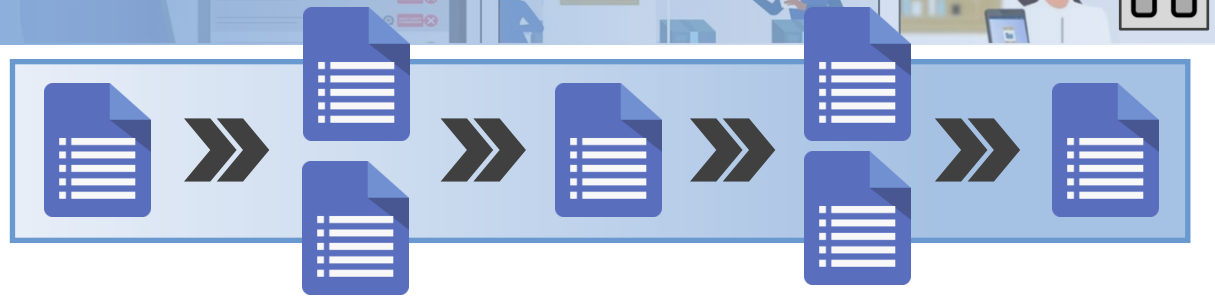
- Questions can be Optional if the Required box is left unchecked
- Questions checked as Unique become the basis of tracking Forms that follow in a Workflow

4.9 Comments & Attachments



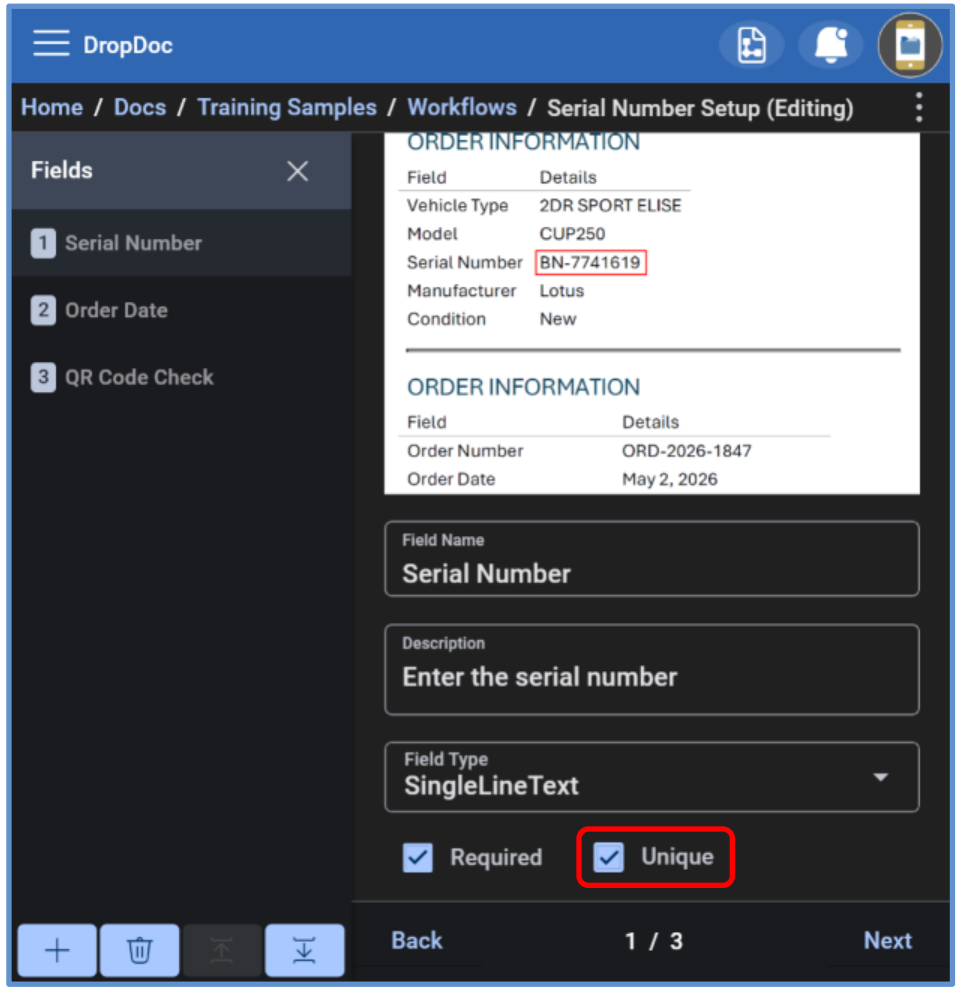
- Comments can be made Optional or Required
- Media submission can be mandatory with min & max number of attachments
- Camera capture can also be forced to prevent media submissions from device gallery

4.10 Workflow Forms

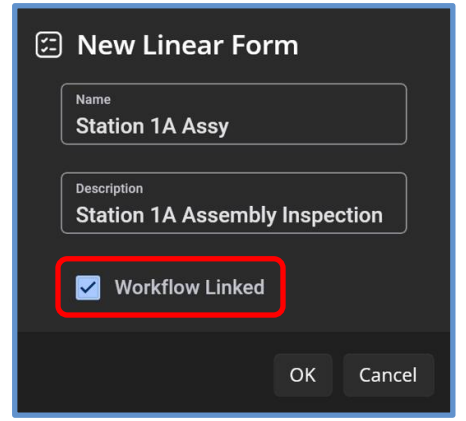


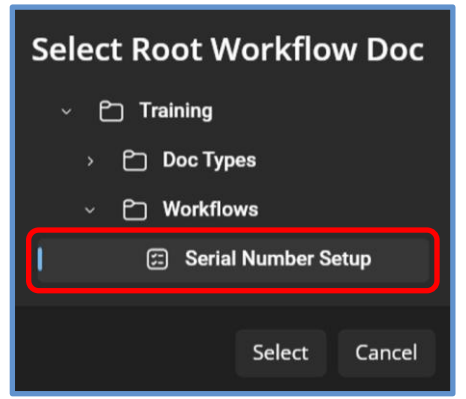
- 1st Form requires a unique ID
- Each subsequent Form needs to have the Workflow Linked
- The unique ID question doesn't need to be created for each Form

1st Workflow Form



Subsequent Workflow Forms



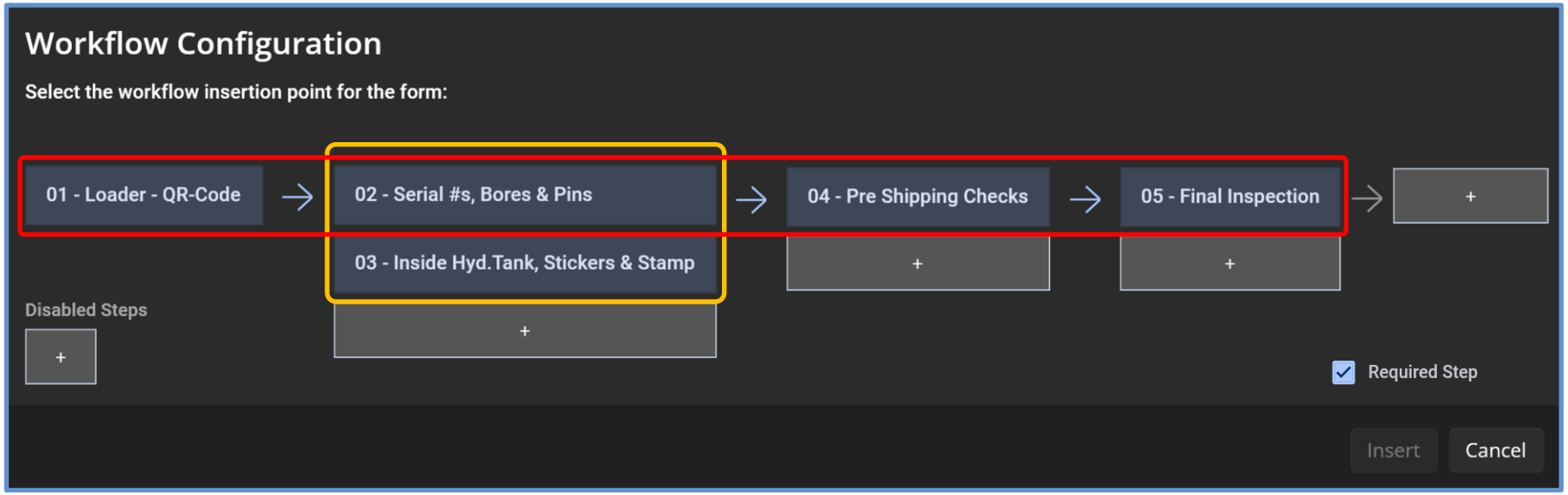


Ref 2.5 - Using Workflows

4.11 Workflow Structure

Workflow Forms can be arranged in two ways:

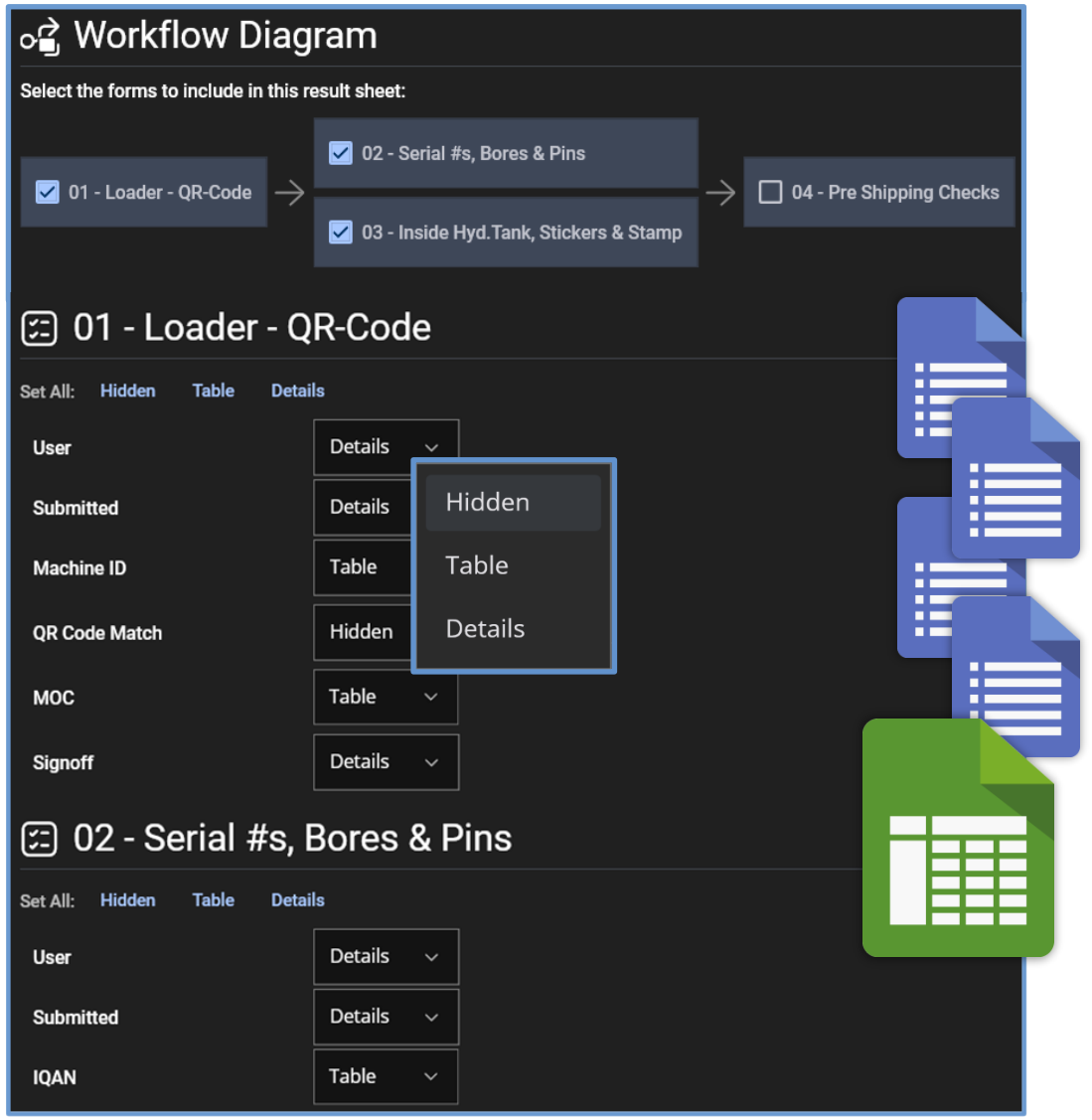
- In Parallel, all Forms can be filled in any order
- In Series, Forms need to be filled in order from left to right



Ref EXT - Creating Workflows

4.12 Creating Results

- After creating a Result Sheet & navigating to a single Form or Workflow Form, applicable data can be selected
- Data display options
  - **Table** – appears in rows & columns
  - **Details** – visible when selected
  - **Hidden** – not included in results

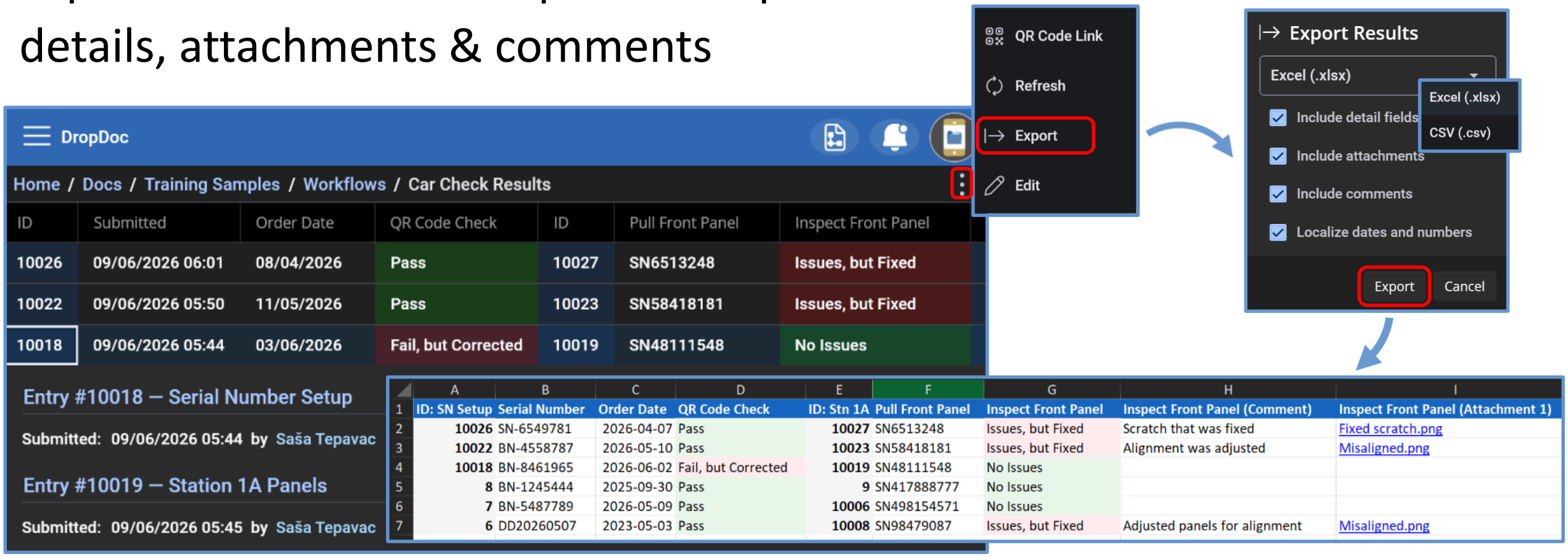


Ref 2.6 - Viewing Results

Ref EXT - Creating Result Sheets

4.13 Exporting Results

- Results can be exported in Excel with formatting or as raw CSV data
- Exported data can be shaped with optional details, attachments & comments

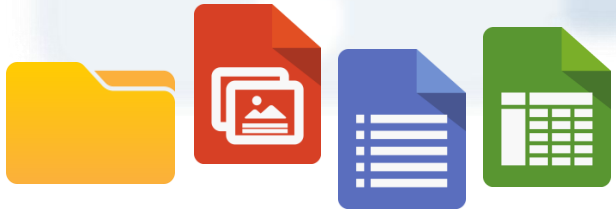


ID	Submitted	Order Date	QR Code Check	ID	Pull Front Panel	Inspect Front Panel
10026	09/06/2026 06:01	08/04/2026	Pass	10027	SN6513248	Issues, but Fixed
10022	09/06/2026 05:50	11/05/2026	Pass	10023	SN58418181	Issues, but Fixed
10018	09/06/2026 05:44	03/06/2026	Fail, but Corrected	10019	SN48111548	No Issues

	A	B	C	D	E	F	G	H	I
1	ID: SN Setup	Serial Number	Order Date	QR Code Check	ID: Stn 1A	Pull Front Panel	Inspect Front Panel	Inspect Front Panel (Comment)	Inspect Front Panel (Attachment 1)
2	10026	SN-6549781	2026-04-07	Pass	10027	SN6513248	Issues, but Fixed	Scratch that was fixed	Fixed scratch.png
3	10022	BN-4558787	2026-05-10	Pass	10023	SN58418181	Issues, but Fixed	Alignment was adjusted	Misaligned.png
4	10018	BN-8461965	2026-06-02	Fail, but Corrected	10019	SN48111548	No Issues		
5	8	BN-1245444	2025-09-30	Pass	9	SN417888777	No Issues		
6	7	BN-5487789	2026-05-09	Pass	10006	SN498154571	No Issues		
7	6	DD20260507	2023-05-03	Pass	10008	SN98479087	Issues, but Fixed	Adjusted panels for alignment	Misaligned.png

5.0 Doc Admin

5.1 Admin Tools
5.2 Users
5.3 Admins
5.4 Single Users
5.5 Shared Accounts
5.6 Roles
5.7 Permissions
5.8 Activity Log
5.9 Recycle Bin
5.10 Admin FYIs



5.1 Admin Tools



Effectively managing an organization in DropDoc requires detailed attention to Doc & User management

Doc Management

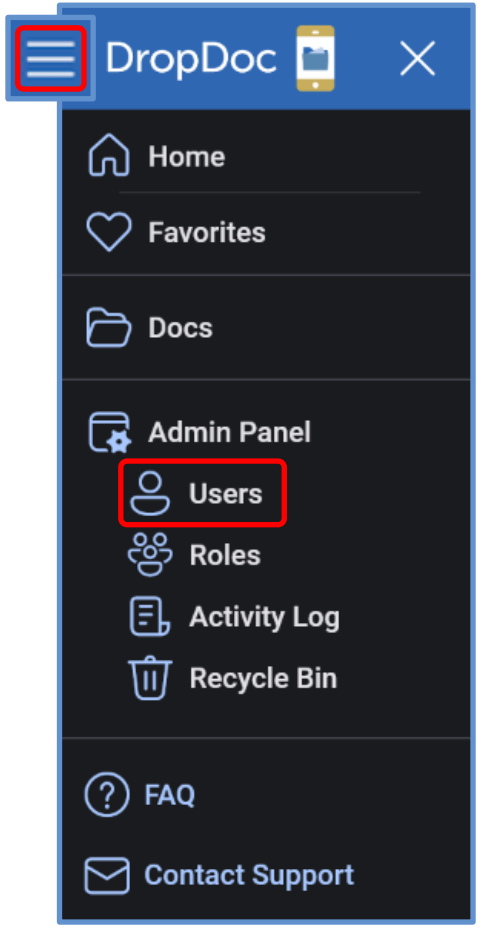
- Slides
- Forms
- Workflows
- Reports

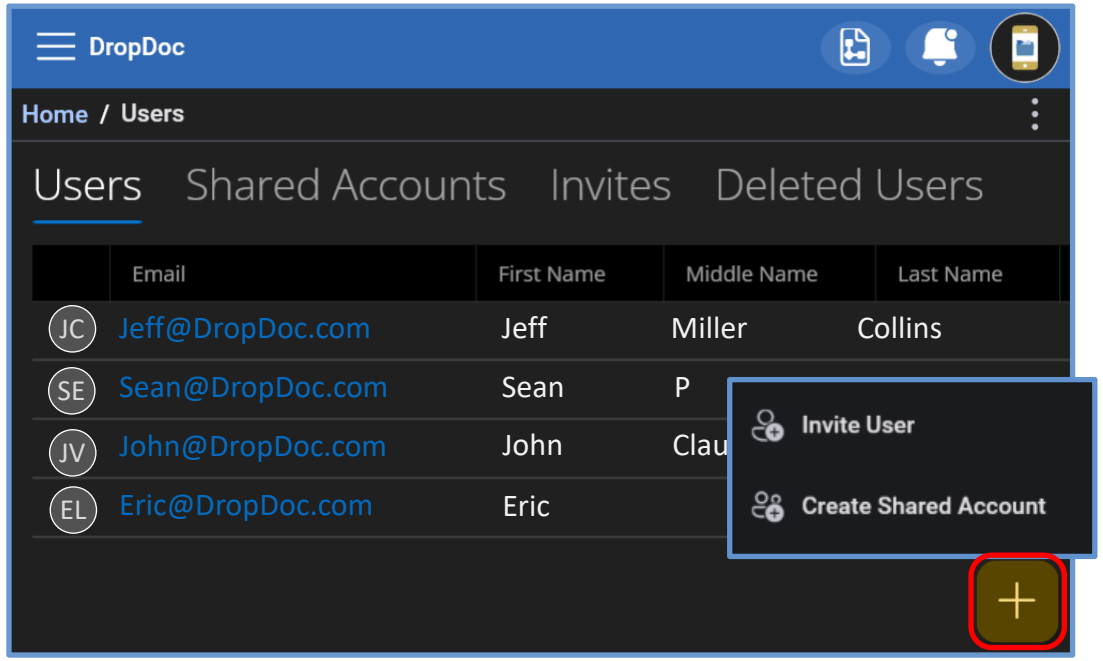
User Management

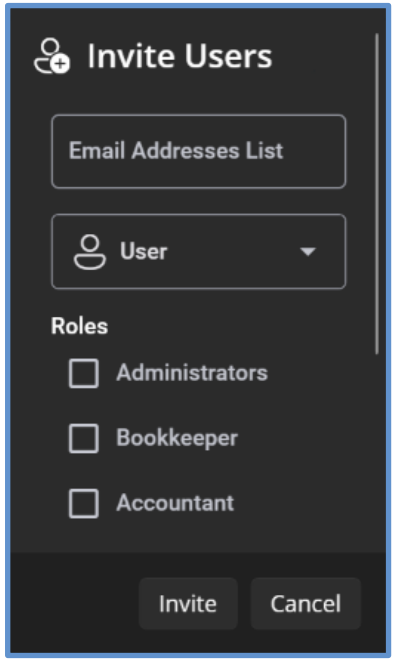
- Roles
- Permissions
- Notifications
- Audit Trails

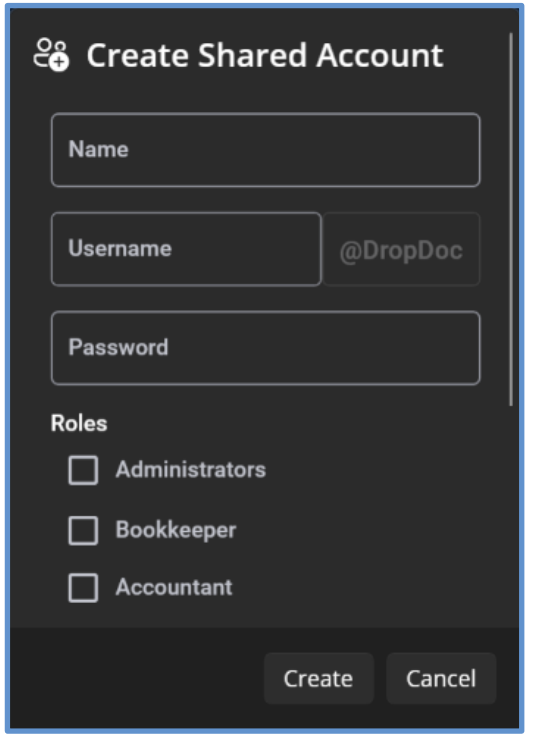
5.2 Users

- The Users Tab can be found in the Admin Panel
- The + button can be used to set up new users



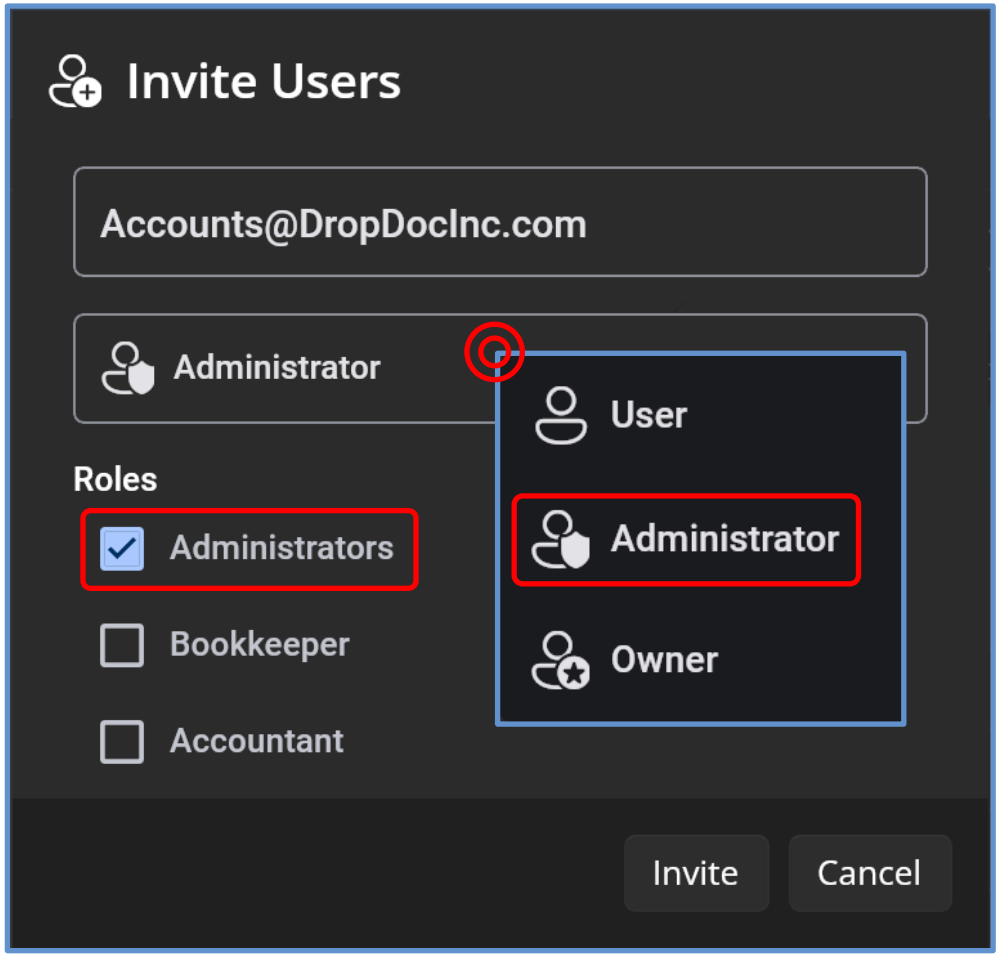






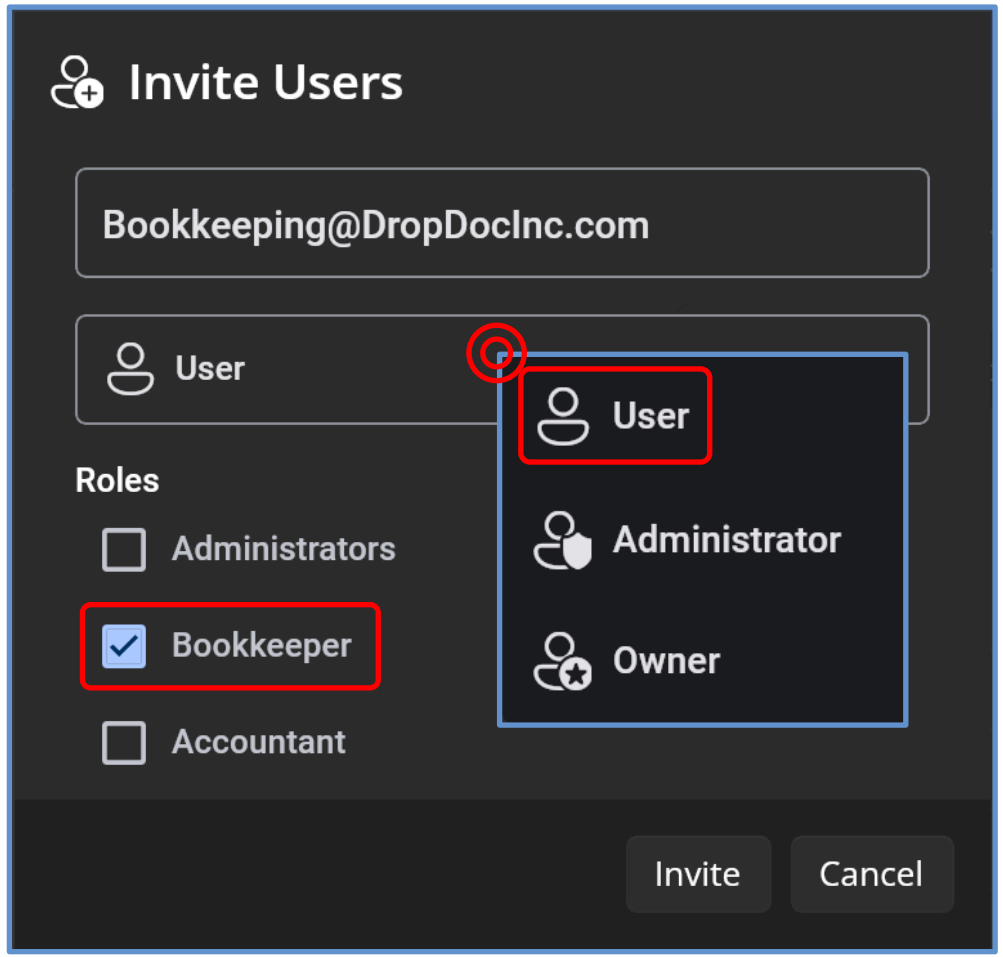
5.3 Admins

- Admin users require a personal email address to create their account
- Ensure that Administrator dropdown is selected as well as an Admin role, if available



5.4 Single Users

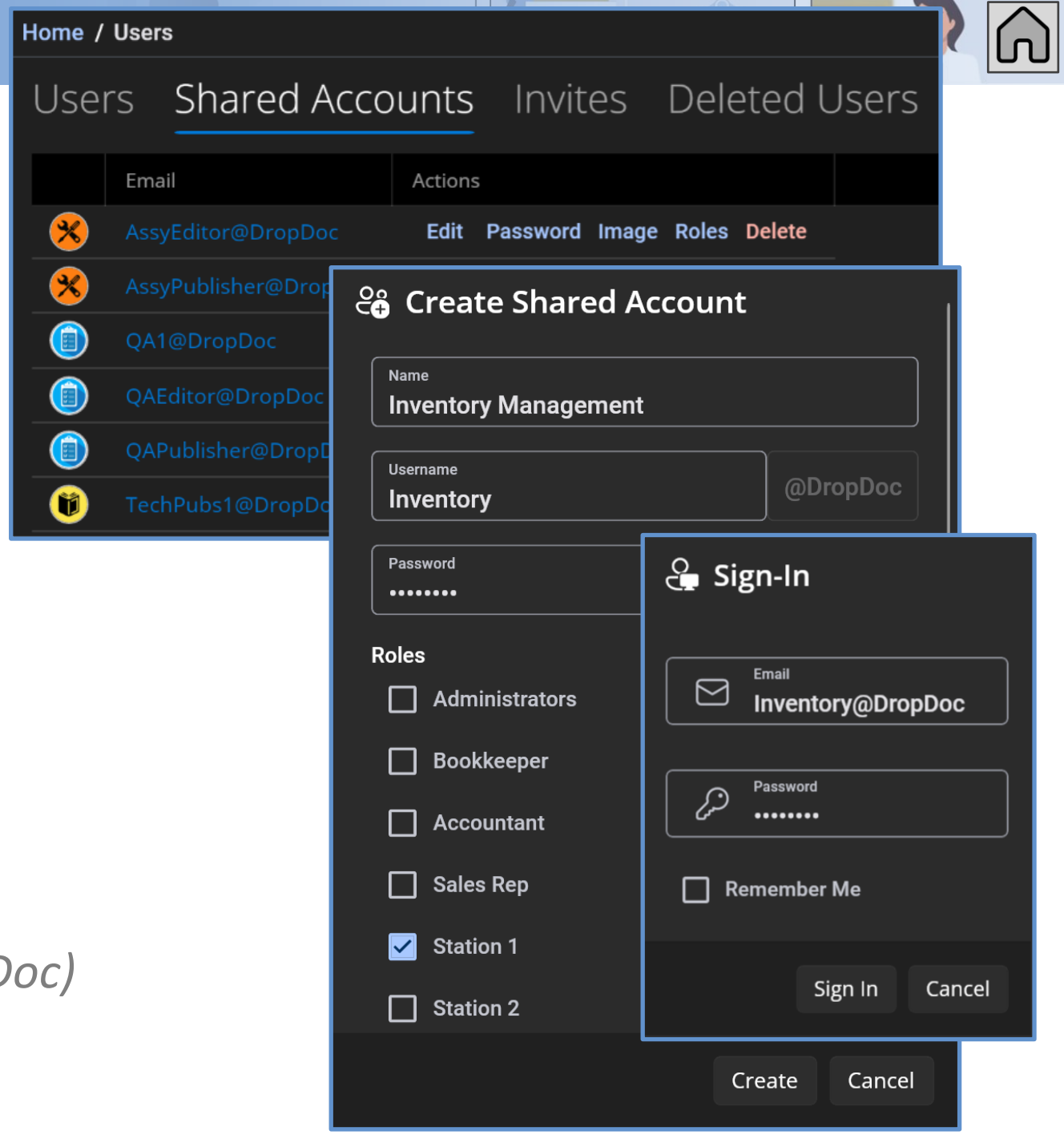
- Single Users require a personal email address to create their account
- Ensure that User dropdown is selected as well as any applicable Roles



5.5 Shared Accounts

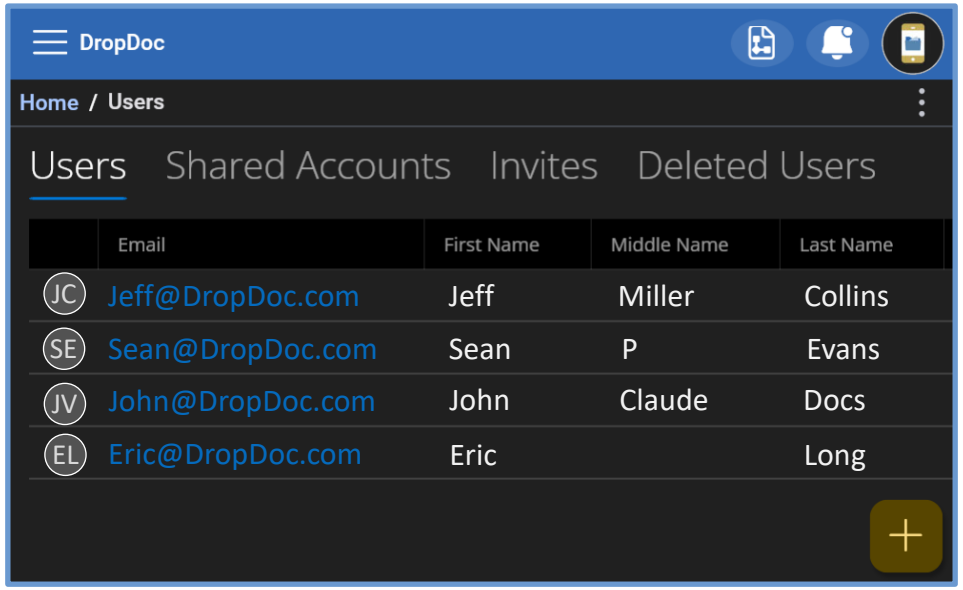
- Managed by Admins for stations that are used by multiple users
- Admins set account:
  - Image
  - Password & Resets
  - Username Email

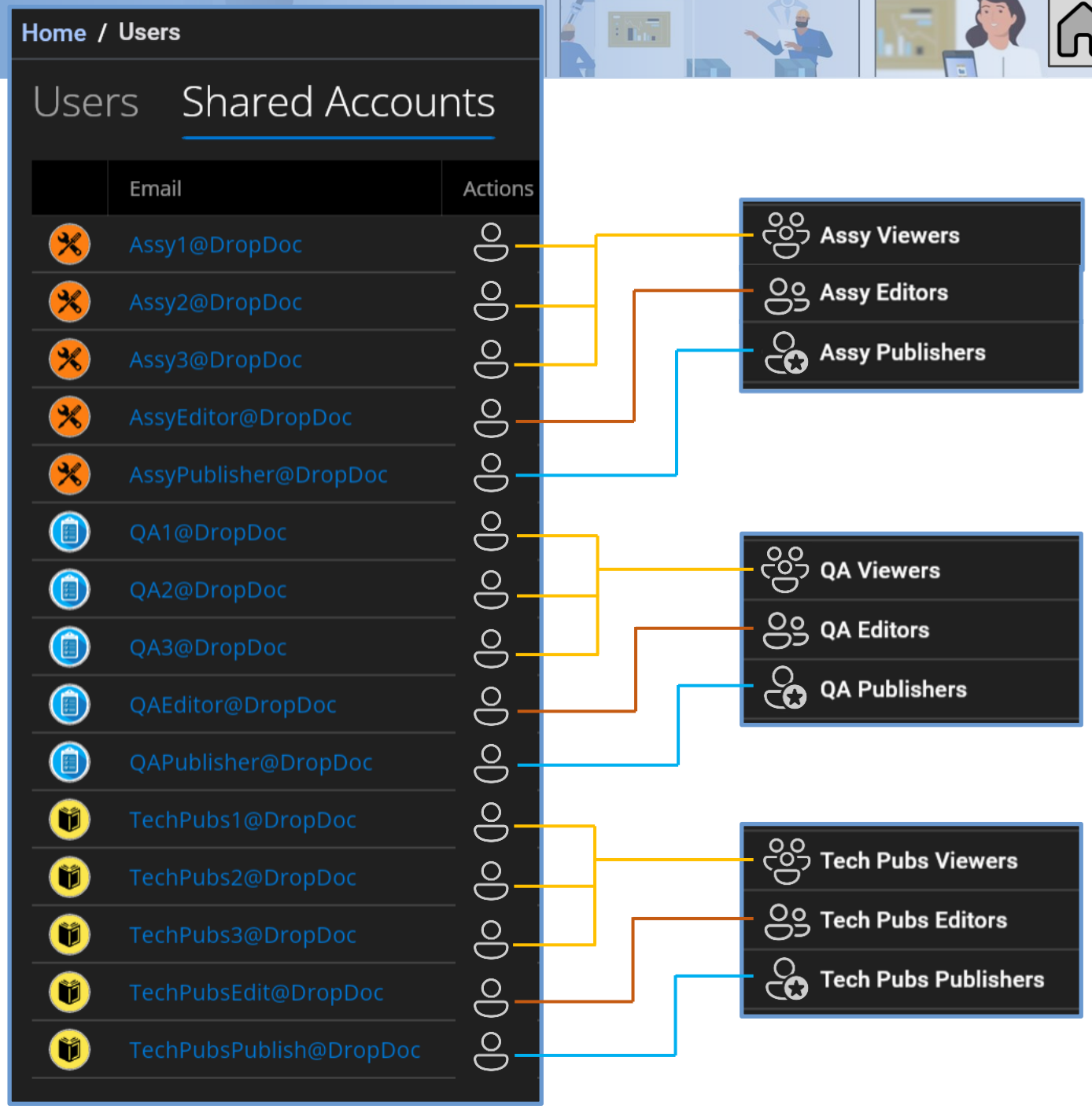
  (created emails only exist in DropDoc)



5.6 Roles

Roles can be used to manage access & permissions for Single Users & Shared Accounts





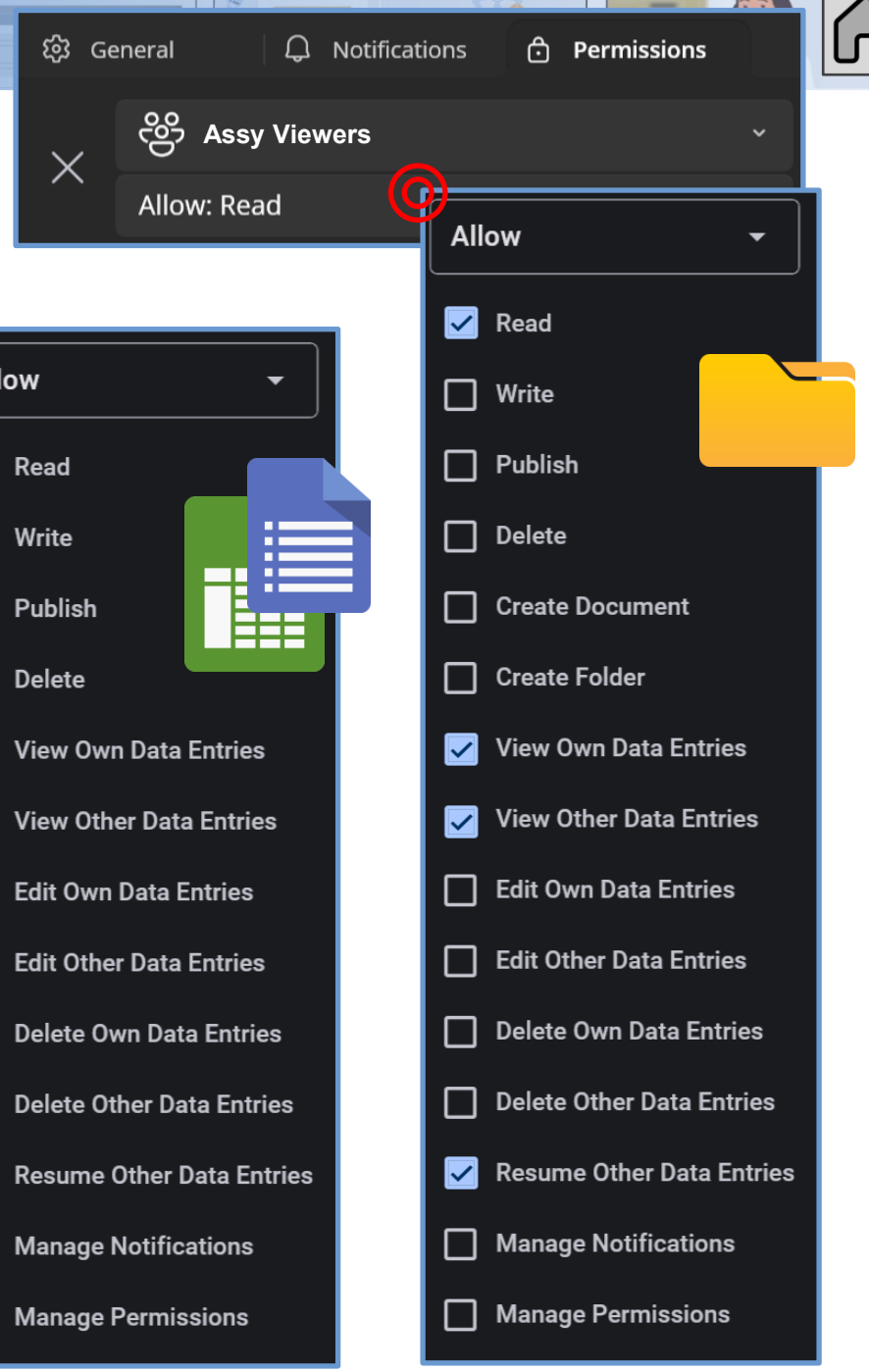
5.7 Permissions

- Permissions for any Doc or Folder can be found in the Properties menu
- Depending on of involvement, users will likely be one of the following:
  - Viewers
  - Editors
  - Publishers
  - Admins



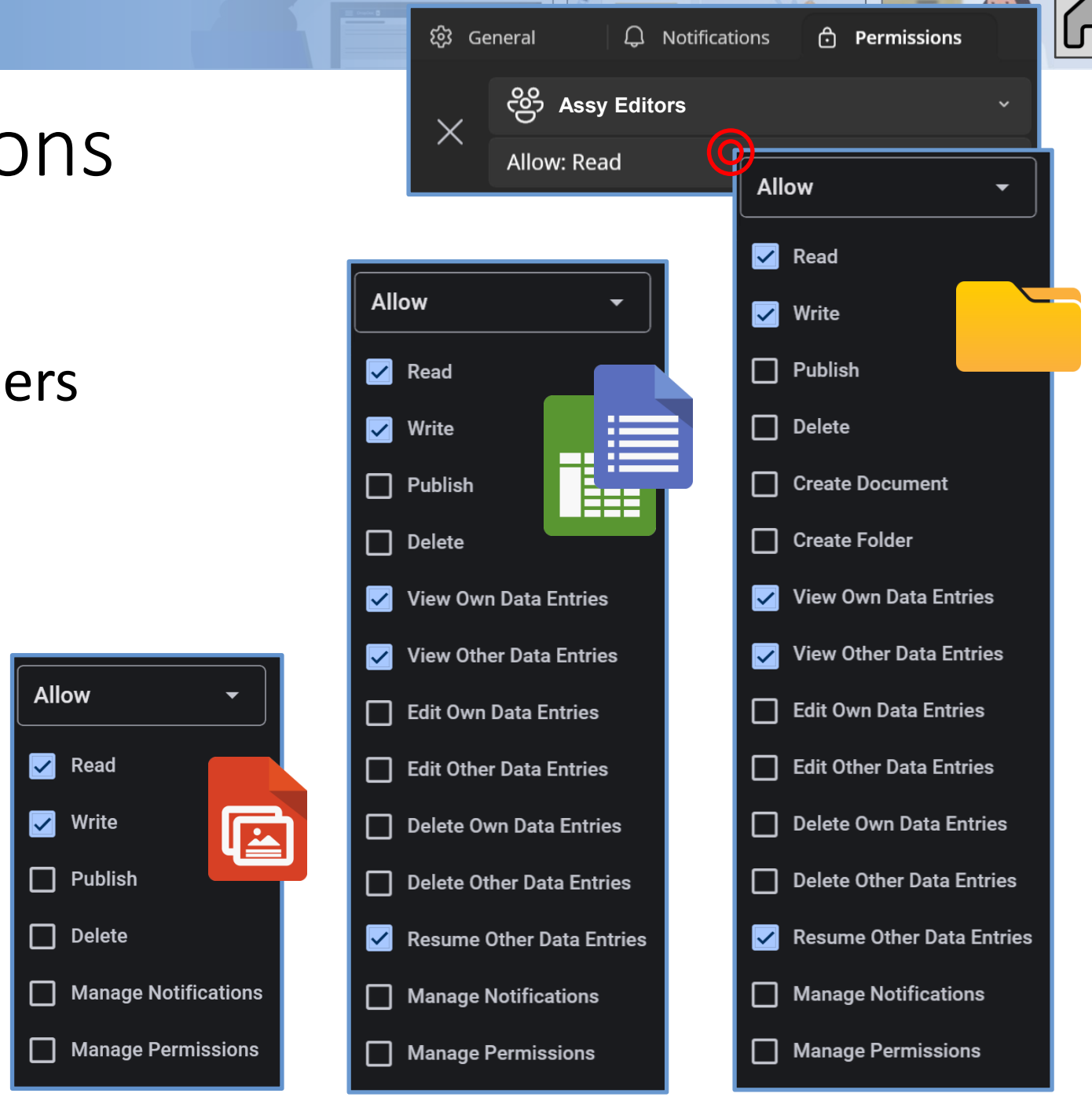
5.7 Viewer Permissions

- Read permissions enable users to view Slides & submit Forms
- Data permissions enable users to view submissions
- Data entries could be resumed for partial form handoffs



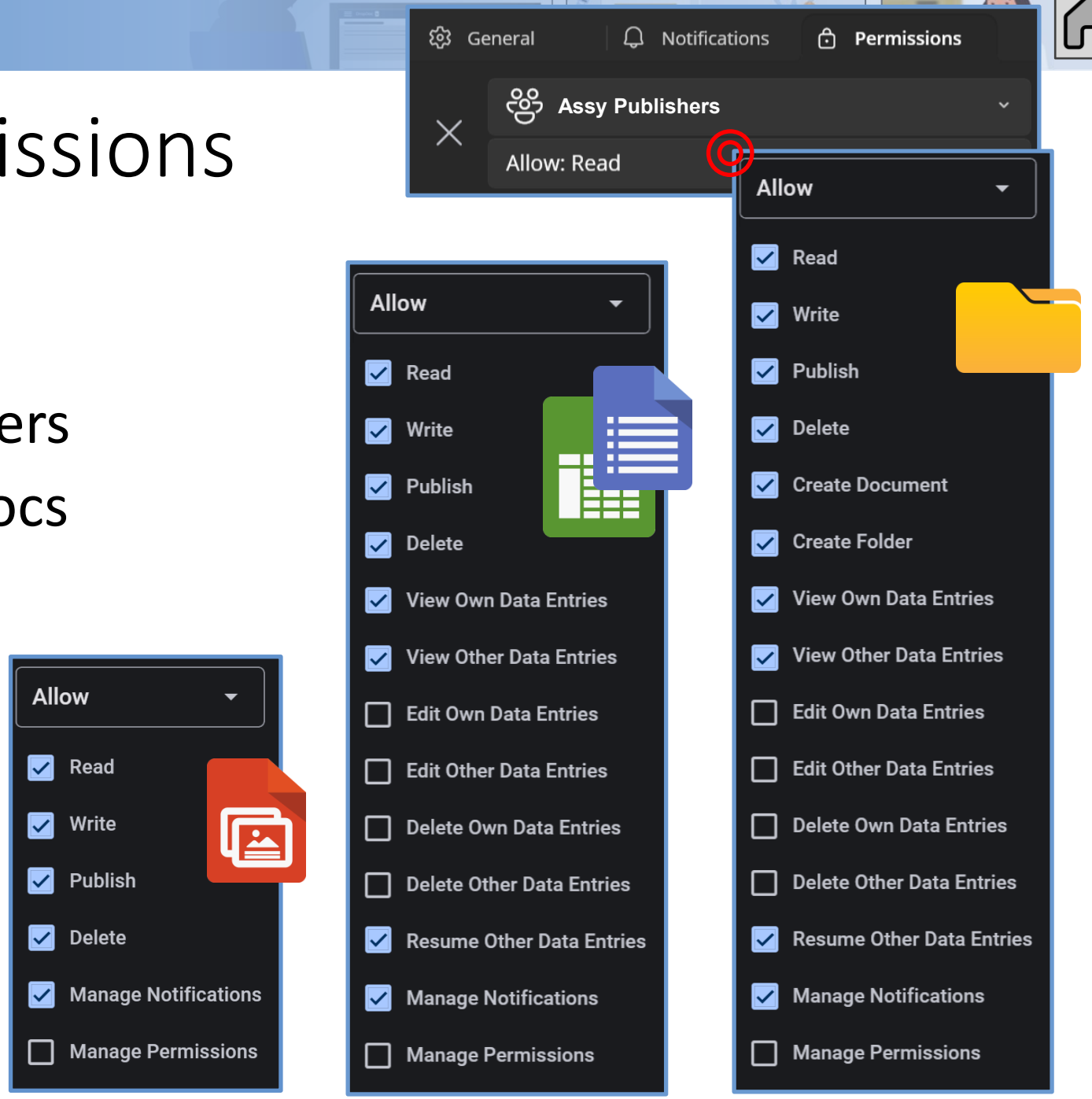
5.7 Editor Permissions

- Write permission enables users to create Doc drafts
- Editors can ping drafts to Publishers to release new official versions



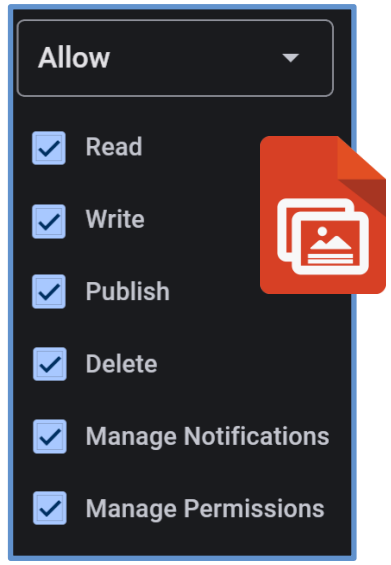
5.7 Publisher Permissions

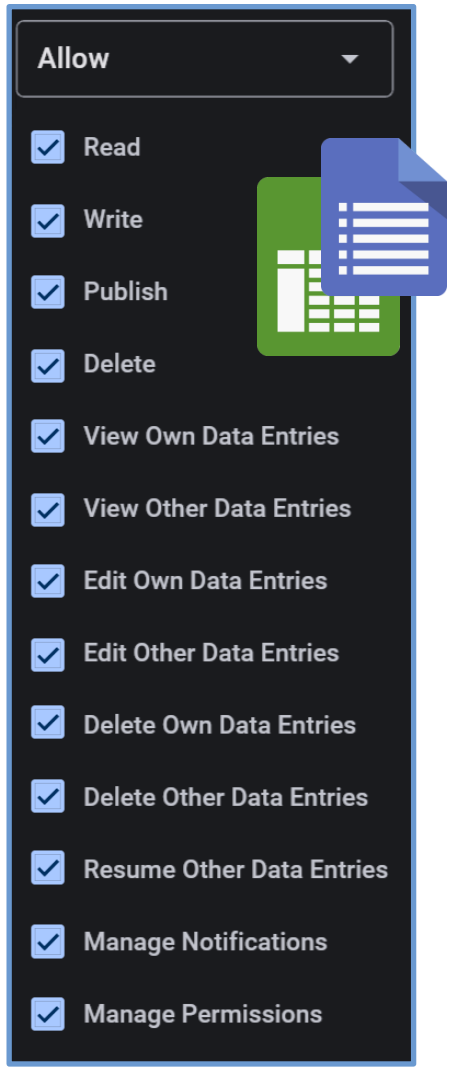
- Publish permissions allow users to release new versions of Docs
- Publishers are responsible for the quality of content



5.7 Admin Permissions

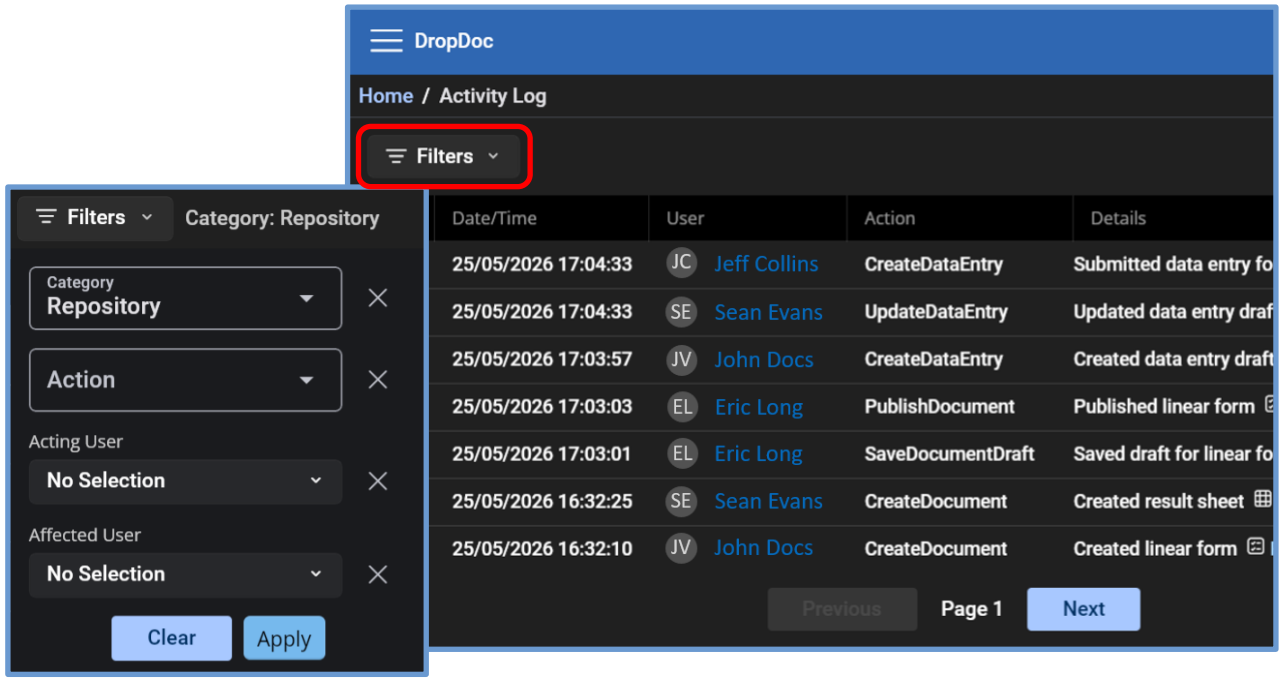
- Admins have all accesses & permissions





5.8 Activity Log

Any category can be filtered alone or per acting and/or affected user



Folders
- CreateFolder
- MoveFolder
- DeleteFolder
- RestoreFolder
- PermanentlyDeleteFolder
- UpdateFolderProperties
- ResetChildPermissions
- ResetChildNotifications

Documents
- CreateDocument
- MoveDocument
- SaveDocumentDraft
- DiscardDocumentDraft
- PublishDocument
- DeleteDocument
- DeleteDocumentVersions
- RestoreDocument
- PermanentlyDeleteDocument
- UpdateDocumentProperties

Data
- CreateDataEntry
- UpdateDataEntry
- DeleteDataEntry

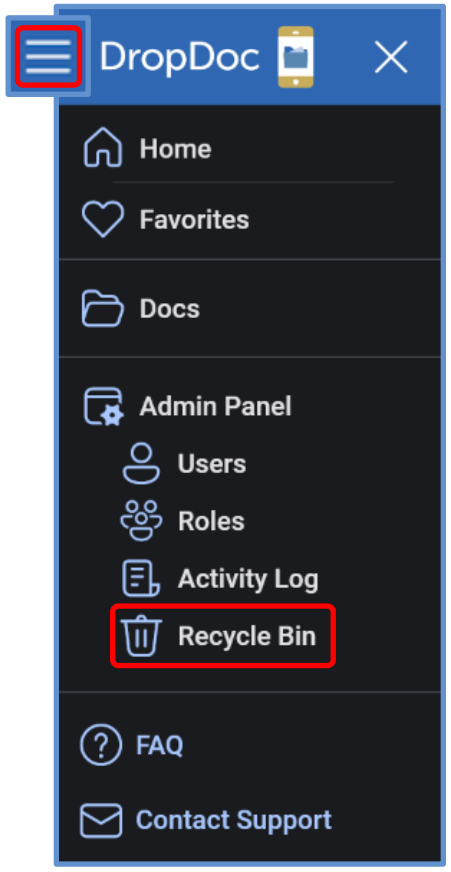
Users
- InviteUser
- ResendUserInvitation
- RemoveUser
- UpdateUserRoles

Roles
- CreateRole
- UpdateRole
- DeleteRole
- UpdateUserRoles

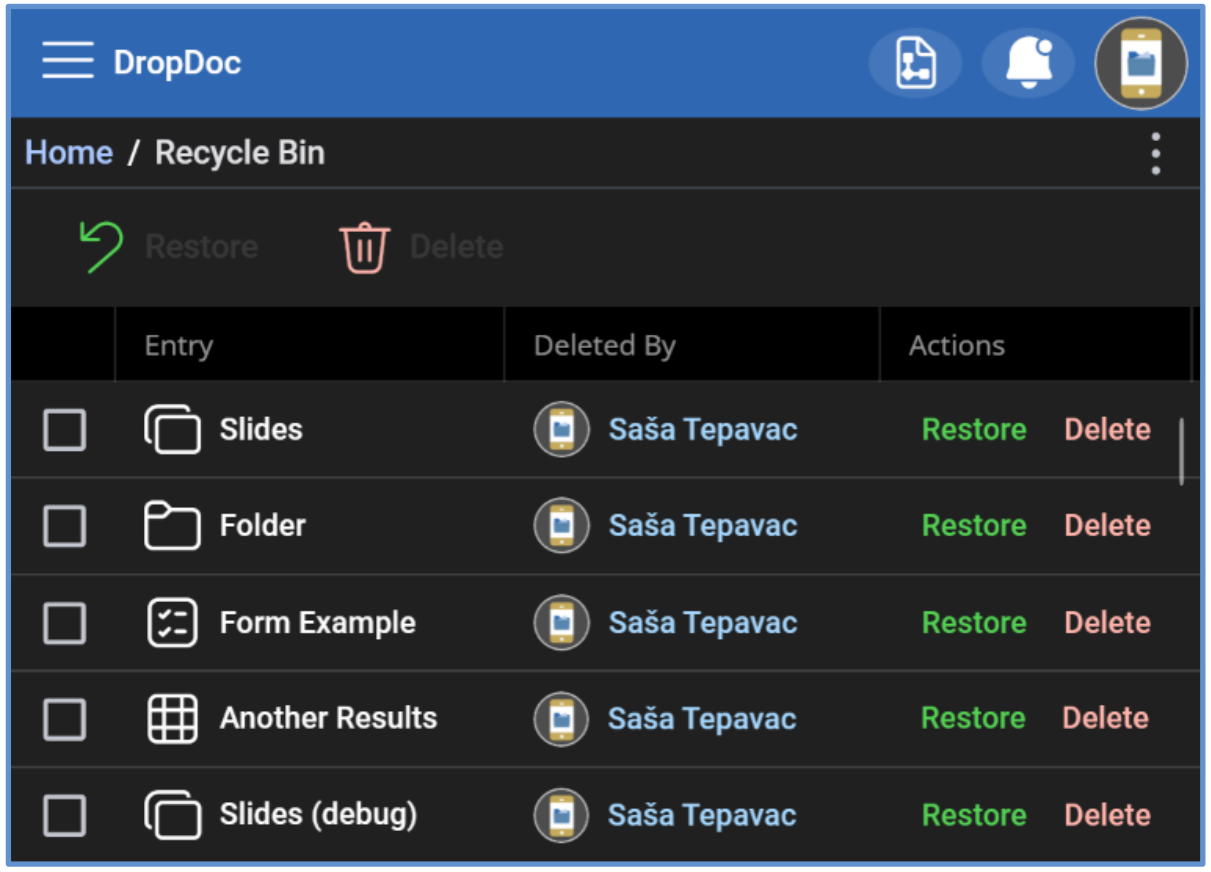
Communication
- SendPing
- CreateAlert

5.9 Recycle Bin

- Deleted Docs & Folders can be recovered from the Recycle Bin

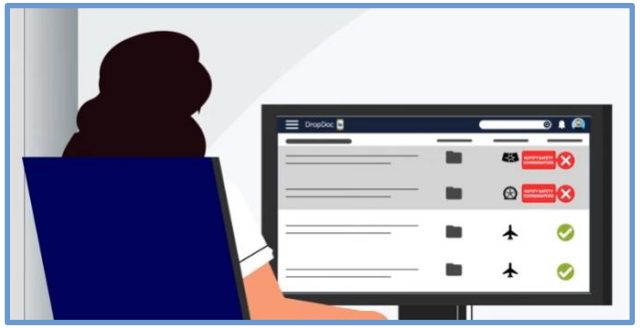


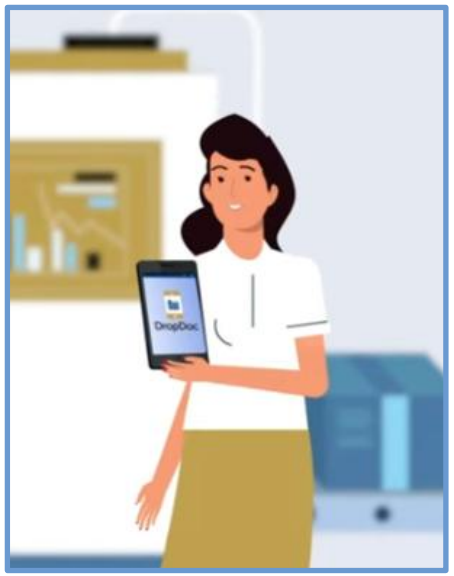
- Docs & Folders deleted out of the Recycle Bin cannot no longer be restored



5.10 Admin FYIs

- Submitted images are automatically adjusted to a reasonable size
- File backup frequencies
  - per second up to 90 days
  - per day up to a year
  - quarterly up to 3 years





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