Get started with Modocu

Modocu facilitates documentation processes on site with your smartphone or tablet. Modocu is successfully used in a wide variety of industries (construction and ancillary construction industry, renovation industry, engineering, facility management, etc.).

Modocu provides you with the following products for your documentation:

- Mobile app for smartphones and tablets (Android, iOS / iPhone / iPad)
- Webapp via Webbrowser (Firefox, Chrome, Microsoft Edge)
- Replication Software (optional) for saving media data on a local server (e.g. in an office).

1 Register an account

You will need an account so that your data can be automatically assigned and saved. You can create an account for your team or company at https://app.modocu.com/signup by simply entering your email address. Subsequently, you will receive an email with your access data.

Anmelden

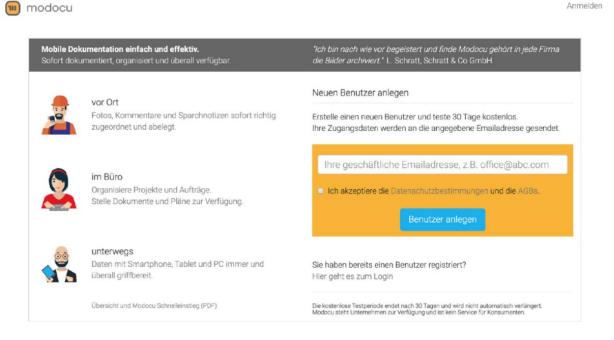


Figure: Create a new account

2 Installing the mobile app on the smartphone and / or tablet

The app is available for iOS (iPhone, iPad) in App Store as well as for Android in Google Play Store. Simply open "Apple Store" on an iOS device or "Play Store" on an Android device and search for "Modocu". Download and install the app on your smartphone or tablet.

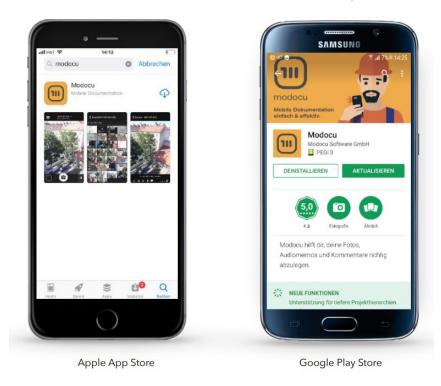


Figure: Start and configure the app on your smartphone.

For the configuration you will be guided through the following steps:

- 1. Allow GPS usage (iOS): Modocu can save GPS coordinates in the pictures and in the meta data. When installing the app, you will be asked to allow GPS-access.
- 2. Start configuration / setup: Click "Go to setup" to start the configuration
- 3. Enter user data: Enter your user name (email) and password
- 4. Username and device: Here you can enter your own name (e.g. first name and surname) and the name of the device (optional, e.g. iPhone or inventory number etc.).
- 5. Synchronization and storage: Specify whether Modocu should synchronize photos and other data only when connected to wi-fi or also using mobile connection (3g/4g/LTE) Specify whether Modocu should save the photos taken with Modocu in your phone gallery or only within the app.
- 6. Allow camera access (iOS): The app needs access to the camera so that you can take photos photos (iOS) with Modocu. For Android, the permissions are requested during installation.







1. Allow GPS access

2. Start configuration

3. Enter user data







4. Username and device

5. Synchronization & Storage

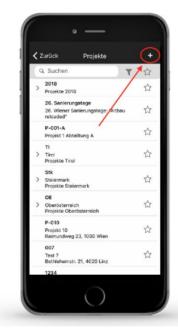
6. Camera access

3 Create and select Project and Job details

Before photos, comments and notes can be immediately and automatically assigned to your jobs and projects, the job or project data must be entered accordingly on your smartphone or via the web app using a browser.

3.1 Enter job details on your smartphone

Go to *Select project* or the *project currently selected* in the upper area to display the project list. Select "+" to enter a new project or job. Click on "Done" to save the project or job. You will be asked if the new project is also the project you're currently working on. All photos, comments and notes are now automatically assigned to this project and synchronized.



Abbrechen Projekte Fertig

1 2018-00457

1 A-457 Landtmann

2 aktiv

Ringstraße. 23, 1010

Beschreibung

1010

Q W e r t z u i o p ü
a s d f g h j k l ö ä

y x c v b n m 2

123 Leerzeichen Weiter



Open project list and select an existing project *or* click on "+" in the upper right corner

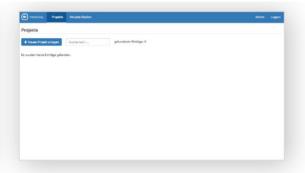
to create a new project and enter project details.

Save and apply

3.2 Create a project or job via the web application

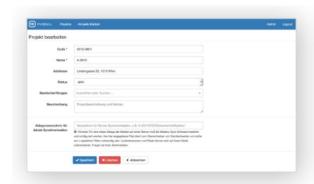
When creating a project or job via the web application the details and data are synchronized and are available for selection on the mobile app.





Login via web browser (Firefox, Chrome, etc.)

Click "+ create new project"





Enter and save project/job details

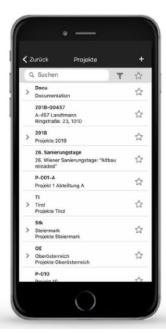
Project/Job list will be displayed.

Changes to the project or order data are always synchronized between the cloud and the smartphone. synchronized. This means that the latest data is always available in the web app or on the smartphone.

4 Select project/job and document in it

If you have not yet selected a project or want to change the project, you must open the project list or Open job list. Select a project so that your photos, comments and notes are automatically assigned to the project. are automatically assigned to the project. If you are using several project levels, you can navigate between the levels by selecting ">" and "<" to navigate between the levels.







Open project/job list

Select project/job

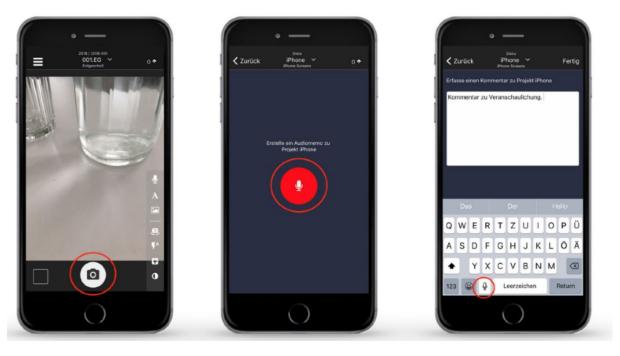
Currently selected project

The selected project is now displayed in the upper area of the screen. All photos, notes, comments will now automatically be synchronized with the selected project.

When opening the app, you are on the camera screen so that you can immediately take photos. You can also add comments and voice comments to the selected project by clicking on the respective symbol on the lower right bar. In the menu there are more functions such as "Import media", "Manage projects", "Uploads", "Settings", "About", etc.



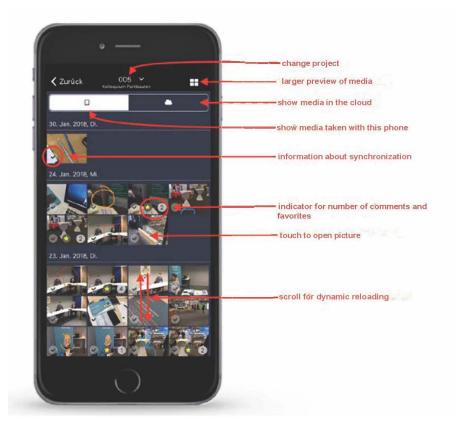
Siri (iPhone/iPad) and *Google Now* (Android) are also supported for adding text comments. You may still need to allow permissions or activate the service (Android: press and hold the microphone in the keyboard).



take pictures record voice comment

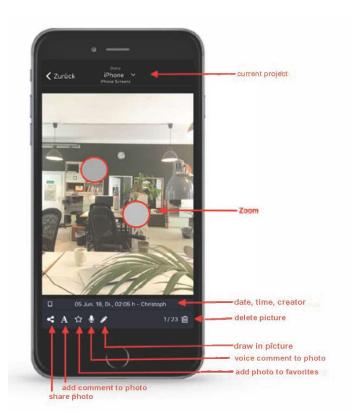
add text comment (Siri)

Functions in media overview of selected project



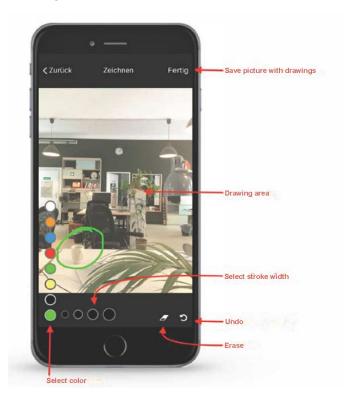
The media overview displays the photos, comments and documents (e.g., pdf) added to the current project.

Functions in full view of media



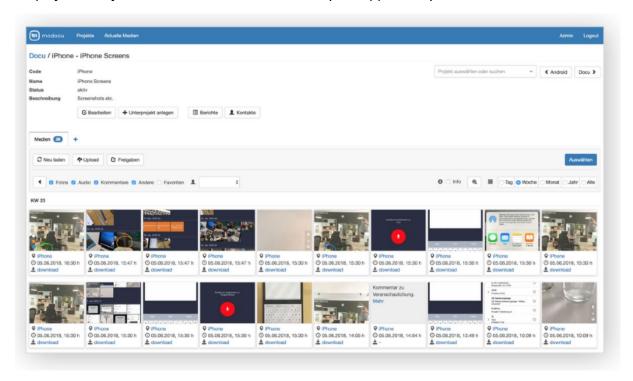
The full view allows for different functions, such as drawing, adding comments, add to favorites or sharing the photo.

Drawing in the photo

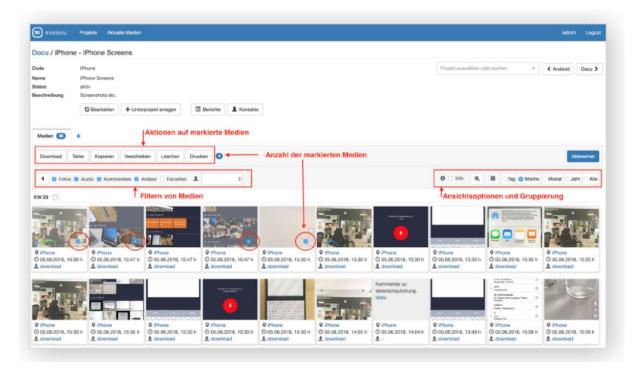


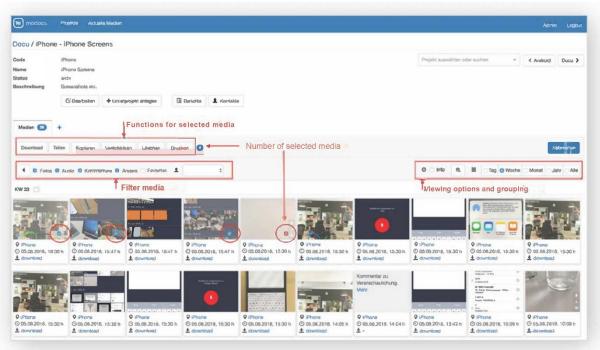
With Modocu, you can also draw in a picture. When saving the original photo will not be overwritten but kept additionally to the picture with the drawings.

Display of the synchronized media in the browser (web application)



Selecting media and other functions





Modocu offers further functionality both in the mobile app (mobile phone / tablet) as well as in the browser (web application). Some of these are listed below:

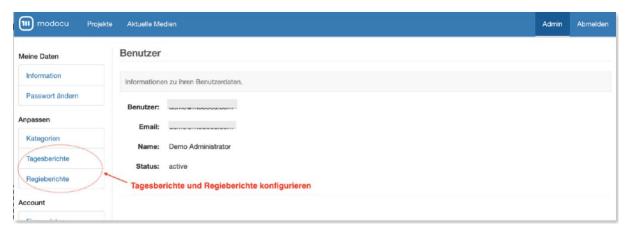
- Uploading documents (pdf, Word, Excel, etc.)
- Manage contacts
- Create reports (Inspection report, progress report, (additional/external) work reports, etc.)
- Create sub-projects
- Show current media
- Enter account details and company logo

- Manage projects
- Manage users, roles and groups

For a detailed description of all functionalities please refer to the further guides at https://www.modocu.com/guides.html / https://www.modocu.com/guides.html / https://www.modocu.com/downloads/

5 Configuration and creation of daily construction and (additional/external) work reports

To use daily construction and (additional/external) work reports, they need to be configured according to your requirements. The configuration values are used as default values in reports. Once the values are configured, this functionality is available to users in the web application and in the app.



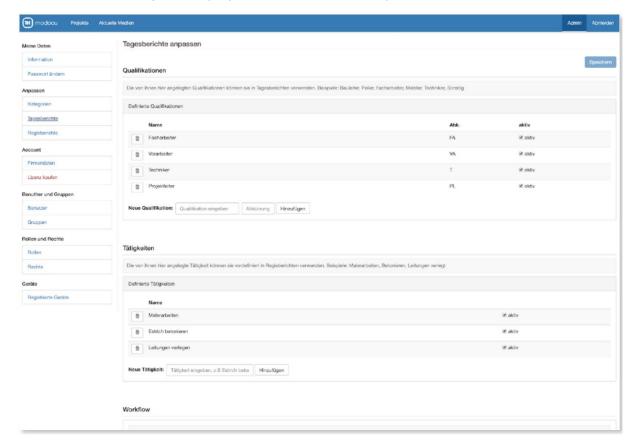
Configuration of daily construction reports

Select "Daily report" to configure daily reports. The configuration involves data that you can define according to your specific requirements. e.g.: Qualifications

For the daily construction reports the following values can be defined:

Configuration	Description
Qualifications	Qualifications used in your company. Examples: Skilled worker, foreman, technician etc. An abbreviation can also be given, e.g. FA for skilled worker
Activities	Recurring and frequently used activities in your company. These activities can be selected in all daily construction reports. It saves time and improves the organization/disposition. Examples: Painting work, plastering work, screed concreting, sanding work
Workflow	Indications for the control and workflow. Internal release/approval: daily construction reports should be released internally before approved by the client (four eyes principle)
Display	Display settings for the report. Name and other company details (logo, company name, address, etc.) can be shown or hidden.

Example for the configuration (only with admin permissions)



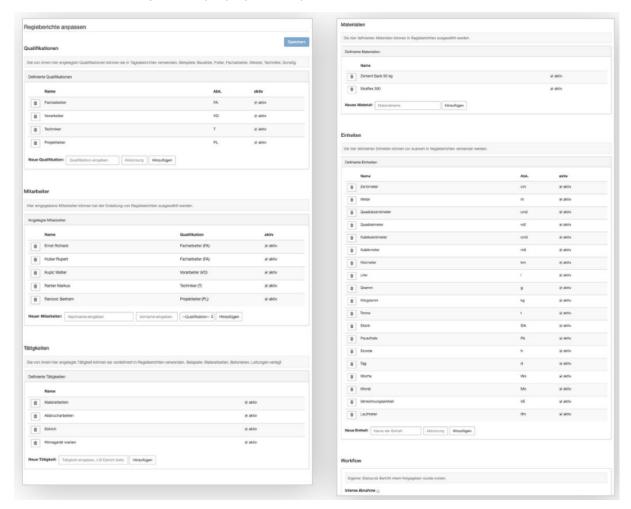
Configuration of report sheets

Select "Report sheet" in order to configure the report sheets. The configuration consists of data that you can define according to your specific requirements, e.g. qualifications, employees, activities, units, materials.

The following values can be configured for control room reports:

Configuration	Description
Qualifications	Qualifications used in your company. Examples: specialist worker, foreman, technician, etc. An abbreviation can also be entered, e.g. SW for specialist worker
Employees	Your internal employees with qualifications that you can select in report sheets
Activities	Recurring and frequently used activities in your company. These activities can be selected in daily reports and report sheets. This saves time and improves organization. Examples: Painting work, plastering work, screed concreting, sanding work
Materials	Predefined materials that you can use in your report sheets
Units	Predefined units (meters, pieces, kilograms, etc.) that you can use for the creation of a materials list. There are predefined default units availa- ble.
Workflow	Indications for the control and workflow. Internal approval/inspection: (Construction) daily report should be approved internally before inspected by the client (four eyes principle)
Display	Display settings for the report. Name and other company details (logo, company name, address, etc.) can be shown/hidden.

Example for the configuration (only by admins)



5.2 Create reports

Create daily construction reports

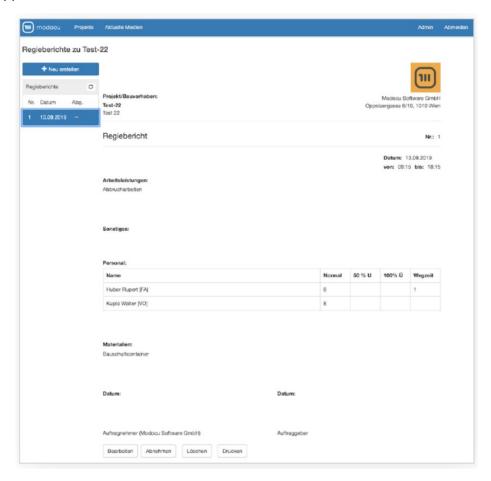
Once the configuration process is complete, users can create daily construction reports and new buttons for the daily construction and (additional/external) work reports are available in the project overview.



Figure: Project data with button for (construction) daily reports and report sheets.

By clicking on the respective field for creating reports the window for the and entering report details or click on an existing report in the list (on the left) to display the corresponding data.

Reports that have not yet been approved can also be edited, released (workflow: internal approval), approved or deleted.

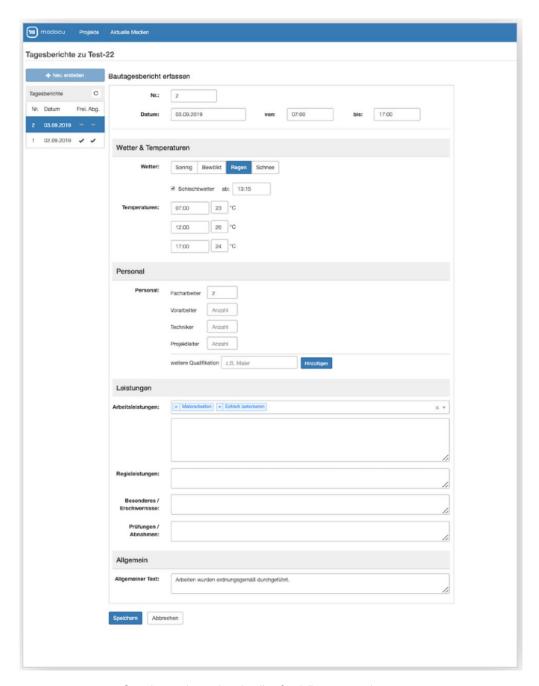


Window for report sheets with details for a report

You can create a new daily construction report by clicking on "Create new". If several daily reports are created for a project, some data such as qualifications and activities are adopted from the previous daily report, as these are often consistent over a period of time. This is intended to speed up and simplify the creation of daily reports.

Predefined and configured standard values (qualifications, activities) are specified in the reports.

In the "further qualifications" field, additional or other appropriate values for qualifications can be added to the report. These can be project-specific qualifications or companies. Examples: "Maler Huber GmbH", 'Crane operator'.

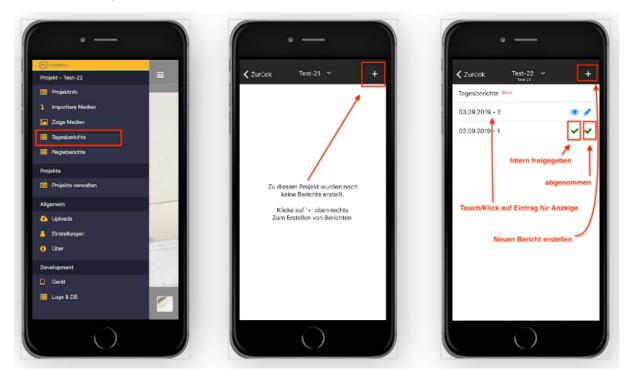


Creating and entering details of a daily construction report

Mobile App

Once the daily reports are configured, users will find a new entry/option in the menu, namely daily reports.

Show list of daily reports:

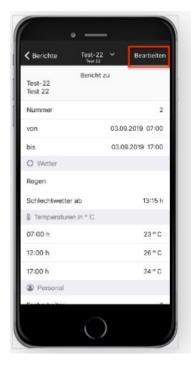


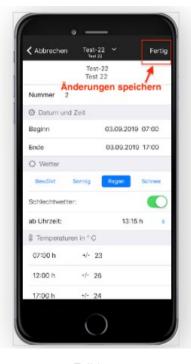
Menu – daily reports

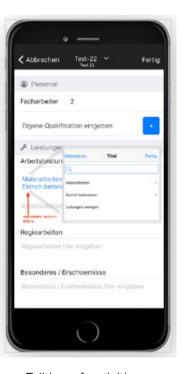
no reports created

List of daily reports

Display, editing, clearance and approval



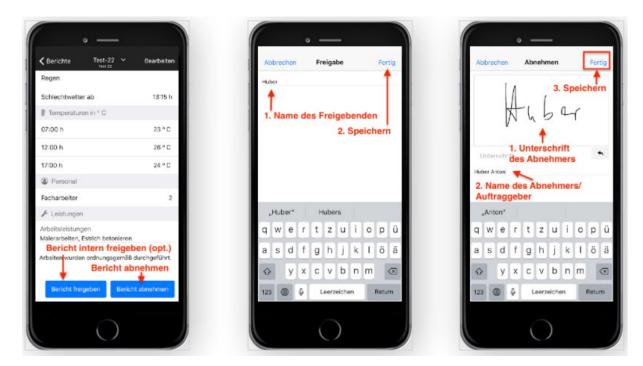




Detailed overview

Editing

Editing of activities



Approval and clearance

Internal approval (optional)

Clearance

Create (additional/external) work reports

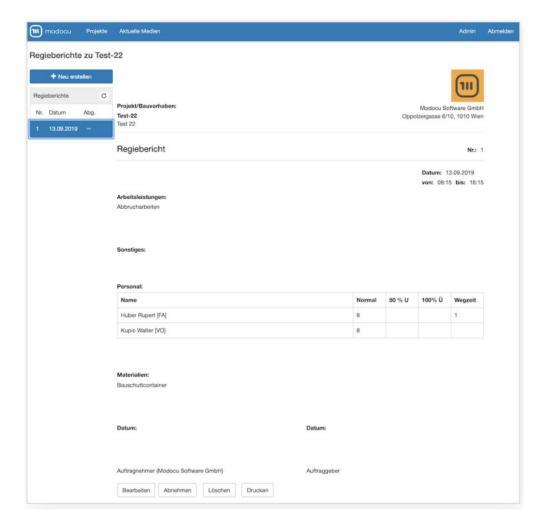
If a configuration has been made, users can enter control room reports. In the detailed view, there are new buttons for daily construction and (additional/external) work reports.

Web application



Project data with button for (construction) daily reports

Click to open the window for creating reports. Click on a report in the list (left) to display the corresponding data. Reports that have not yet been cleared can also be edited, released (workflow: internal approval), approved or deleted.

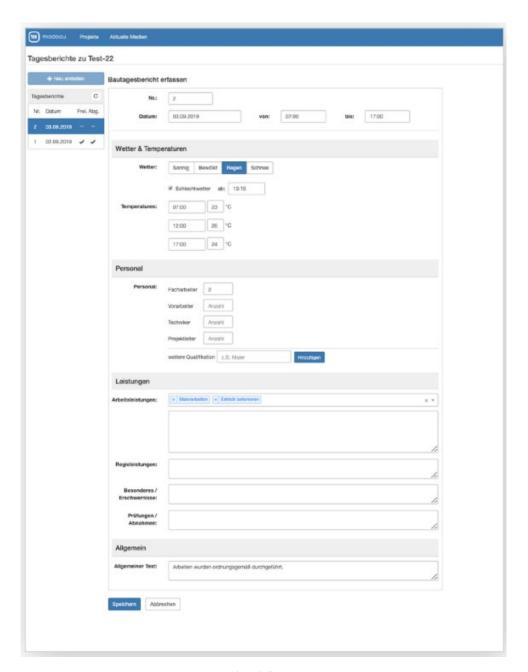


Window for report sheets

By clicking on "Create new" you can create a new report sheet. If you create more than one report for a project, some data from the last report, such as qualifications, activities, will be automatically added to the new report, as these often stay the same over a period of time. Thereby, the creation of daily reports shall be accelerated and simplified.

Predefined and preconfigured default values (qualifications, activities) are specified in the reports.

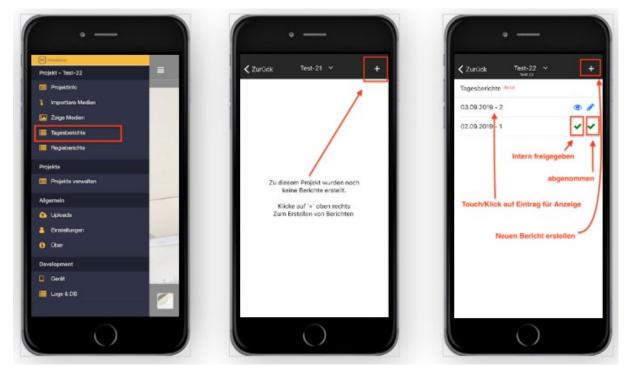
You can add additional values for qualifications in the field "further qualifications". These can be project-specific qualifications or companies, for example. Examples: "Maler Huber GmbH", "crane operator", etc.



creating daily reports

App/Mobile Application

As soon as the daily reports have been configured, users will see a new option in the menu. Show list of daily reports

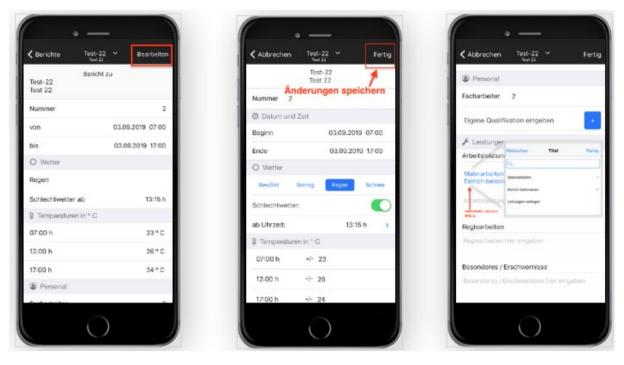


daily reports in the menu

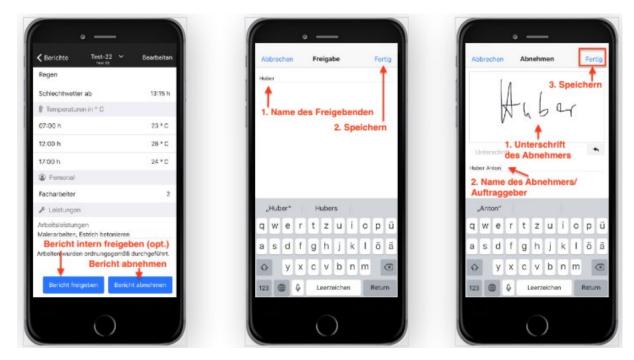
no reports available

list of reports

Overview, editing, release and approval



detailed overview editing editing of activities



Release and approval

internal release (optional)

approval

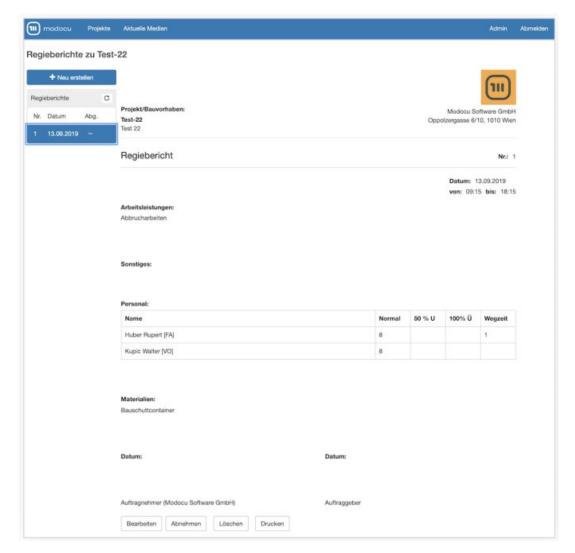
Create (daily) construction reports

As soon as a configuration of the reports have been completed users are able to create (daily) construction reports. In the detailed overview there are new options for daily construction reports and report sheets (construction diary).

Web application



By clicking on the respective option the window for the creation of reports will be opened. By clicking on an existing report in the list (on the left) the respective data will be displayed. Reports that have not yet been approved (externally) can still be edited, released (Workflow – internal approval), approved or deleted.



Window for report sheets with detailed overview of the report

By clicking on "Create new" you can create a new report sheet. If you create more than one report sheet for a specific project ... (?)

Predefined and preconfigured values can be selected in the reports.

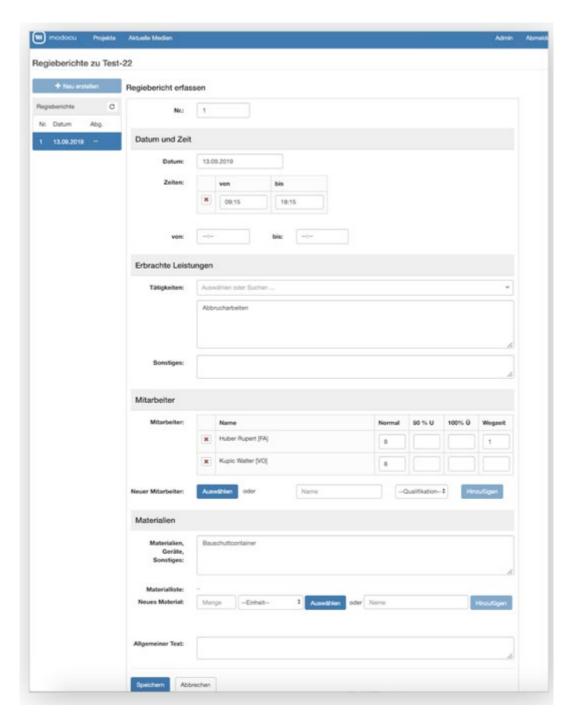
Several time specifications (from - to) can be entered.

Activities can be selected from a list of predefined activities for faster data entry.

Employees can be selected from a list. Non-predefined employees can also be added. The number of hours can be entered for each employee.

In addition to a general specification of materials, materials can also be selected from a list of predefined values. The quantity and unit must also be entered.

Click "Save" to save the created or edited report.



window for the creation of (additional) work reports

App / mobile application

Show list of (additional) work reports







work reports in the menu

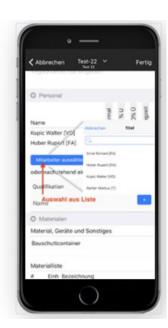
no reports created yet

list of reports

Overview, Editing and Approval windows



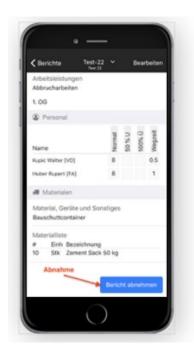




detailed overview

editing window

edit personnel





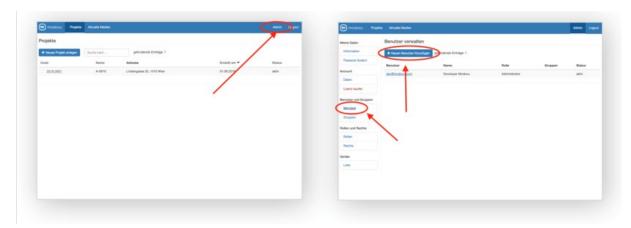
Approval

Signature and Approval

Create and manage additional users (optional)

As an administrator, you can create additional users for your team or company. Each user receives their own password and access. You can also assign specific roles and rights to users.

Go to the admin section by clicking "Admin" in the upper right corner and then click "Users" to access the user administration. Click "+ Create new user" to create a new user.



Click on "Admin" (upper right corner)

Go to section "Users" and select "Create new user"

Assign user name(s)

Create a new user by entering their e-mail address. If your user does not have their own e-mail address, you can also enter a user name (only lower case letters, numbers, -, _ and no special characters, e.g. herbert-lackner). If no e-mail address is specified, a prefix is also added to the user name (e.g. azjo-herbert-lackner.) Click on "Check and proceed" to verify whether the desired user has not yet been created.

Password

If the user has not yet been created, you can have Modocu generate a password automatically and the access data will be sent to the user by e-mail. You can also explicitly assign a password for the user and decide whether you want to send the access data to the user. The user can change the password later.

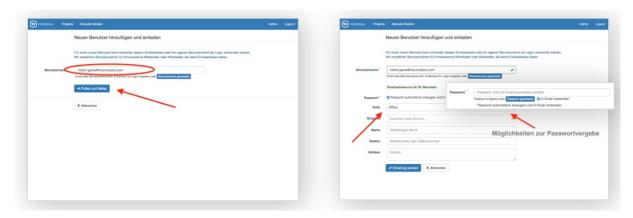
Roles, groups and profile

You can assign specific permissions to a user by assigning them a corresponding role. Modocu has predefined roles for the most frequently used scenarios. See the description of the roles in the appendix.

Groups are used to combine individual users into groups. Projects or orders can then be assigned to individual groups (e.g. a group "Installation service Vienna", order data can then be assigned to this group).

Additional contact details and notes can be added to a user's profile.

For detailed information on how this works, please refer to the "Modocu Administration" operating instructions.



Select "Send invitation" or "Create a new user" (without e-mail) to create a new user.

7 Replication of media data on a local server (optional)

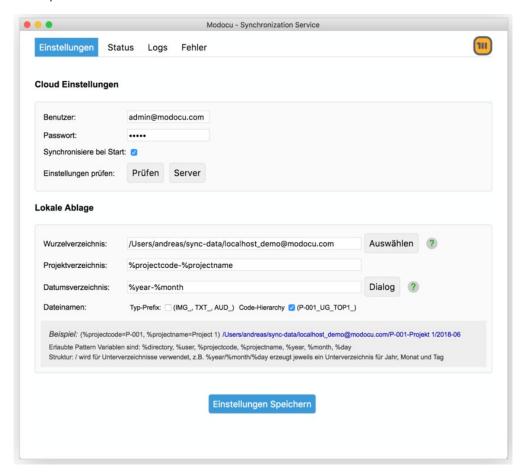
With Modocu's replication software you can transfer the media data from the cloud to a local server/computer.

Installation

You can download and install the software at https://www.modocu.com/downloads/ for the respective operating system.

Configuration and settings

In order for the data to be replicated to a computer, the access data (user with Administrator or Manager role), the storage location (root directory) and the storage structure (project code/name, date) must be specified accordingly. Select "Save settings" after the configuration has been completed.



Settings window

Cloud settings

The user name and password of the user for logging into the cloud service must be specified.

"Synchronize on start" specifies whether synchronization should also be started when the program is started.

"Check" can be used to check whether the specified user data is correct.

The address of the cloud service can be changed with "Server". This is only necessary for special installations (on-premise, proxies, etc.) and does not usually need to be changed.

Local storage

The storage location (resulting from the root directory, project directory and date directory) is the directory to which the media data is replicated. A separate subdirectory is created for each project or order. In addition, time-specific subdirectories (per month or per day) are created. This dynamic structure can be individually defined using predefined variables.

Directories

Variables	Description
%projectcode	Project/job code of the project or job
%projectname	Project/job name of the project or job
%year	Current year
%month	Current month
%day	Current day

File names

You can also define whether the file name should be preceded by a corresponding prefix (IMG=photo, AUD=audio, TXT=text).

For projects with multiple hierarchies, you can also specify whether the project codes of the entire project hierarchy should be included in the file name.

Example for the storage of media data:

D:\Media\Modocu\BPL-01\OG1\Top1\2018-05\BPL-01_OG1_Top1_20180530_124343_394.jpg

Configuration for local storage: Root directory: D:\Media\Modocu\

Project directory: %projectcode results in BPL-01\OG1\Top1\

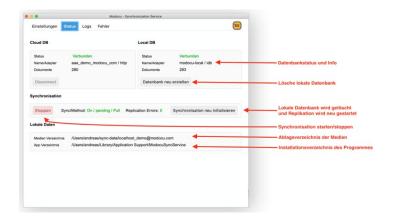
Date directory: %year-%month results in 2018-05 File names: Type prefix: off Code hierarchy: on

Status:

The "Status" area shows you the status of the program

- Databases for synchronization are connected
- Synchronization is active
- Media directory and application directory

Additionally, there is the option to reinitialize the synchronization and to start or stop the synchronization.



Logs, errors, info

The last media downloads are displayed in the "Logs" overview. By selecting the log file, precise logging information is displayed.

The last errors are displayed in the "Errors" view. The errors usually relate to photos that have already been deleted in the cloud and can no longer be synchronized.

The version of the application is displayed in the "About" view (logo).



Logs and most recent media downloads

display of errors

version/program information

You can find a comprehensive description of all software products and functionalities at https://www.modocu.com/downloads/

Appendix

1 Role description

Name	Description
Administrator	All permissions
Manager	Has the permission to create projects, edit and delete all project data, media, reports, approvals and contacts
Office	Has the permission to create projects, edit and delete their own and assigned project data, media, reports, approvals and contacts
Office Read Only	Has the permission to access and read all project data.
Assigned + Project	Has the permission to create projects, edit their own and assigned project data, media, reports, approvals and contacts, and delete only their own data.
Assigned	Has no permission to create projects, but can read and partially edit assigned project data, media, reports, approvals and contacts.
Assigned Read Only	Has the permission to access and read only assigned projects.
External	Cannot create projects, has permission to read and partially edit assigned project data and media. Has no access to the web application via web browser.