



SokoPro

Finland's leading project bank

Admin Guide



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Introduction

SokoPro is a web-based service for data management, sharing and archiving.

Efficiently managed construction

Whether you're managing an individual construction project, a large shopping centre or multiple projects and contractors, SokoPro provides the tools you need to flexibly manage all your construction projects. With SokoPro, information about schedules, deliveries and blueprints is always up to date. In addition to digital sharing, you can order materials as paper prints, with our couriers handling the delivery.

Property management

SokoPro can be utilised in property maintenance throughout a property's life cycle. Blueprints are kept safe and available for use for renovations, for example. The up-to-date information found in SokoPro provide cost-efficiency and save both time and money

Certified for information security and safe to use

SokoPro is a certified information security pioneer in the construction sector. The project bank is web-based and used with personal accounts and passwords. SokoPro's can also be linked to other customer web systems.

SokoPro Helpdesk

We are here to help! Contact our helpdesk team through tel. +358 200 35 211 (€1.10/min) or helpdesk@sokopro.fi. We are open Mon-Fri from 9 am to 4 pm (GMT+2).

Sales

Mon-Fri from 9 am to 4 pm (GMT+2).
cad.myynti@grano.fi

About: SokoPro

/ SokoPro is a web-based service for data management, sharing and archiving.

/ We provide full document control services including the upload and management of your documents inside SokoPro. Please contact our sales team for further information:

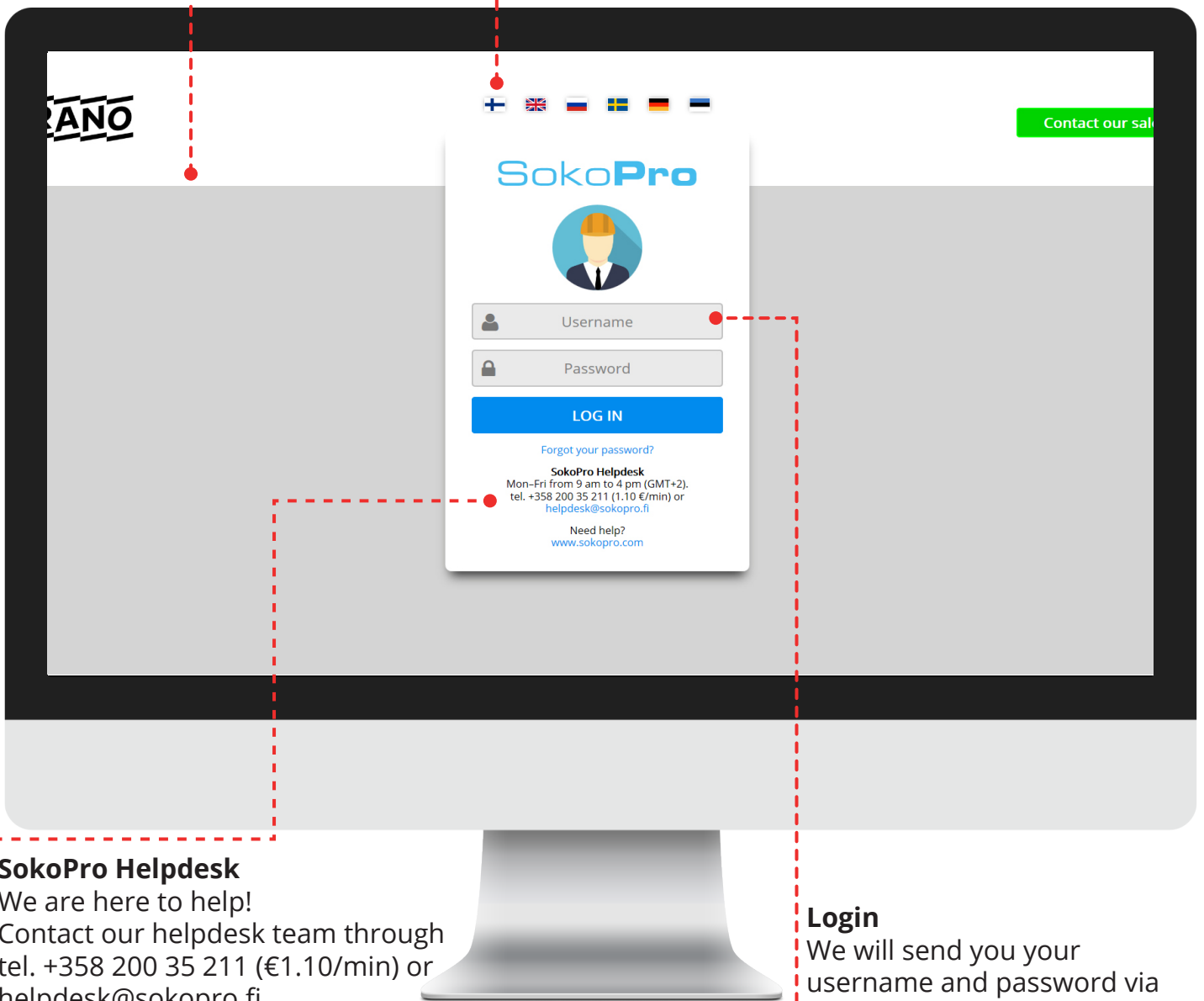
cad.myynti@grano.fi

Logging in to SokoPro

Log in to the SokoPro project bank at <https://www.sokopro.fi>.

The language menu

You can change the user interface language from the login page.



SokoPro Helpdesk

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tel. +358 200 35 211 (€1.10/min) or
helpdesk@sokopro.fi.

We are open Mon-Fri from 9 am to
4 pm (GMT+2).

Login

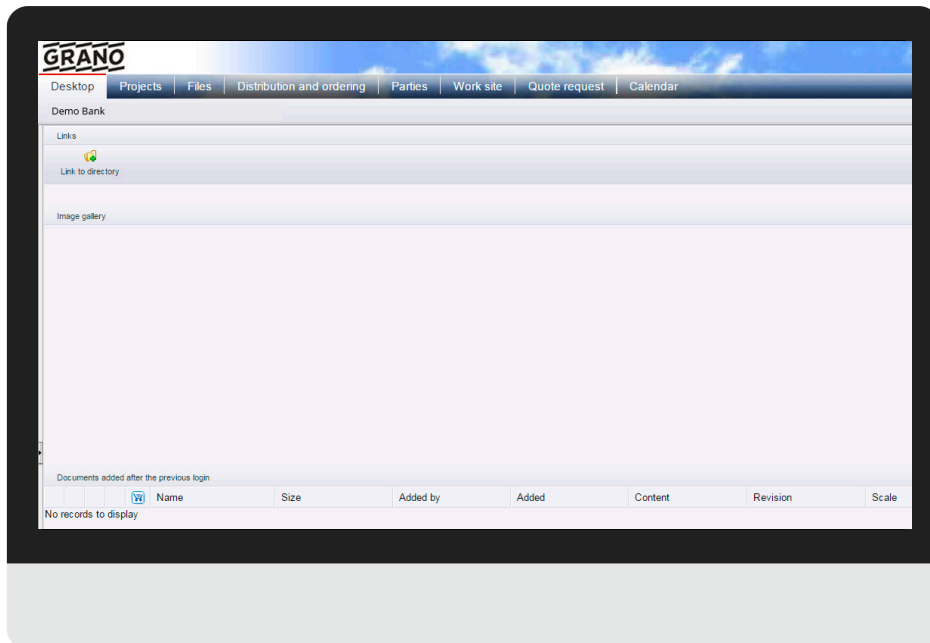
We will send you your
username and password via
e-mail. Enter your username
and password in the login
screen. After this press the
Login button.

Make sure to use upper and
lower cases correctly and
leave out any extra spaces.

Selecting a project bank

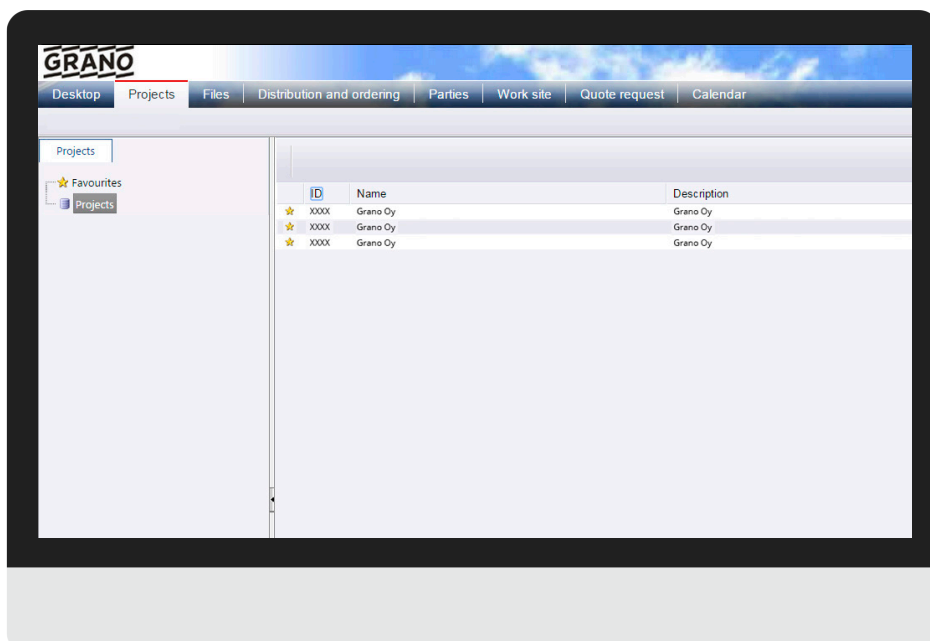
A single project

If you are only involved in a single SokoPro project, this project will automatically be displayed on the front page of the bank.



Multiple projects

If you are involved in several SokoPro projects, select your desired project in the project bank window. You can mark frequently used projects as Favourites by using the star icon. Through the *Projects* tab you can also switch between projects during a single session. The requirement is that projects need to be assigned to the same user account. If you have received several usernames for some reason, please contact the Helpdesk.

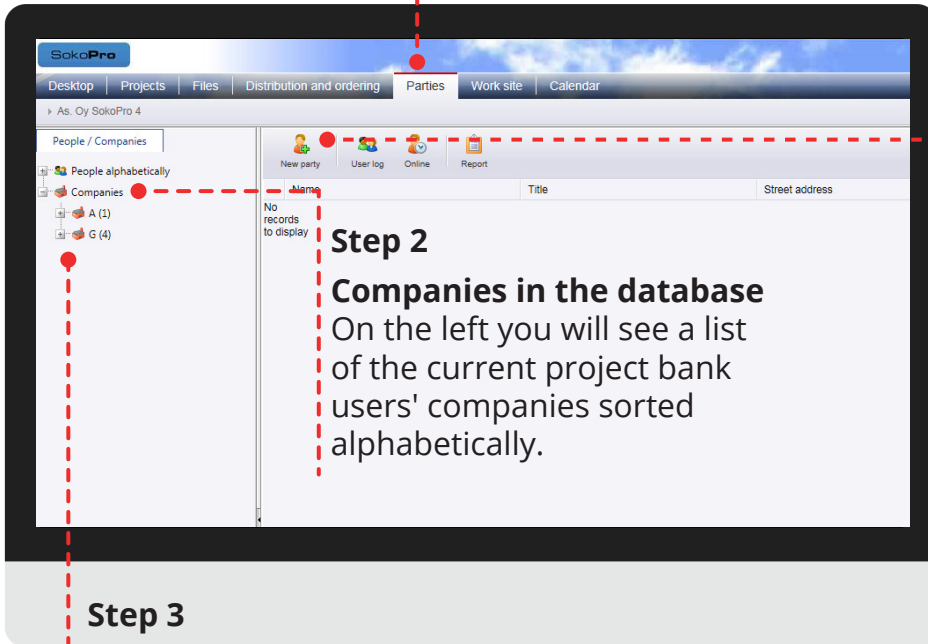


Adding a new user

Step 1

Parties tab

To add a new user to an existing company directory, first go to the *Parties*-tab.



Step 4

New Party

Click the *New Party* button in the upper toolbar to open a window where you can add new users.

Step 2

Companies in the database

On the left you will see a list of the current project bank users' companies sorted alphabetically.

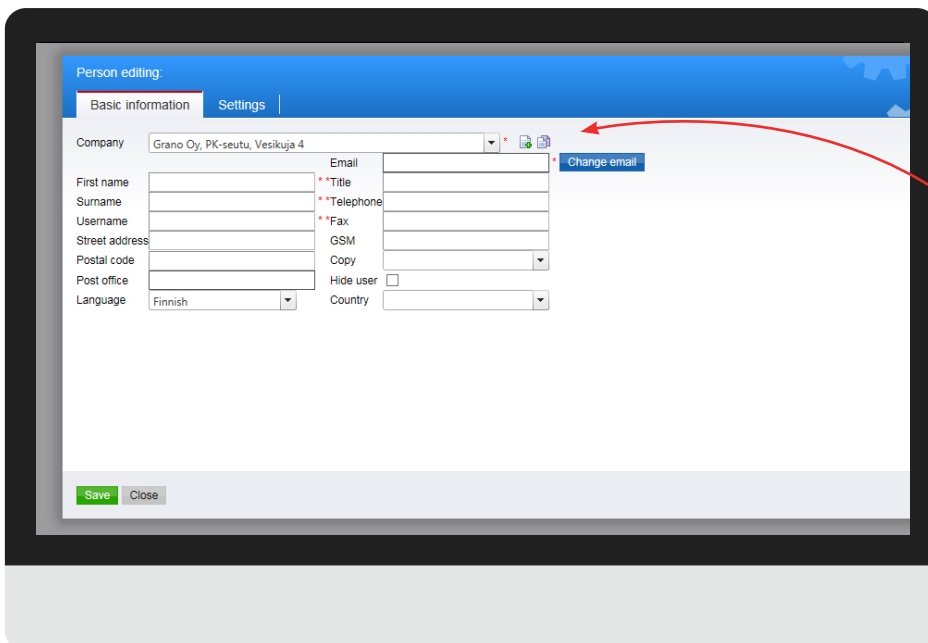
Step 3

Selecting a company

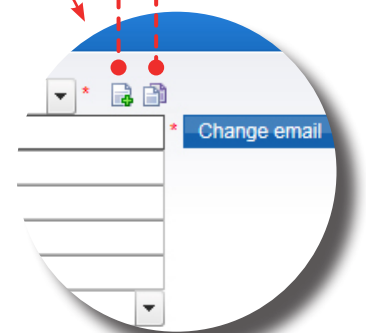
Find the company you are looking for based on its initial. Open the company directory using the plus icon and find the company that you wish to add a new user to.

Add a new company

If you cannot find the company in the project directory, you can add it using the icon.



Copy the address



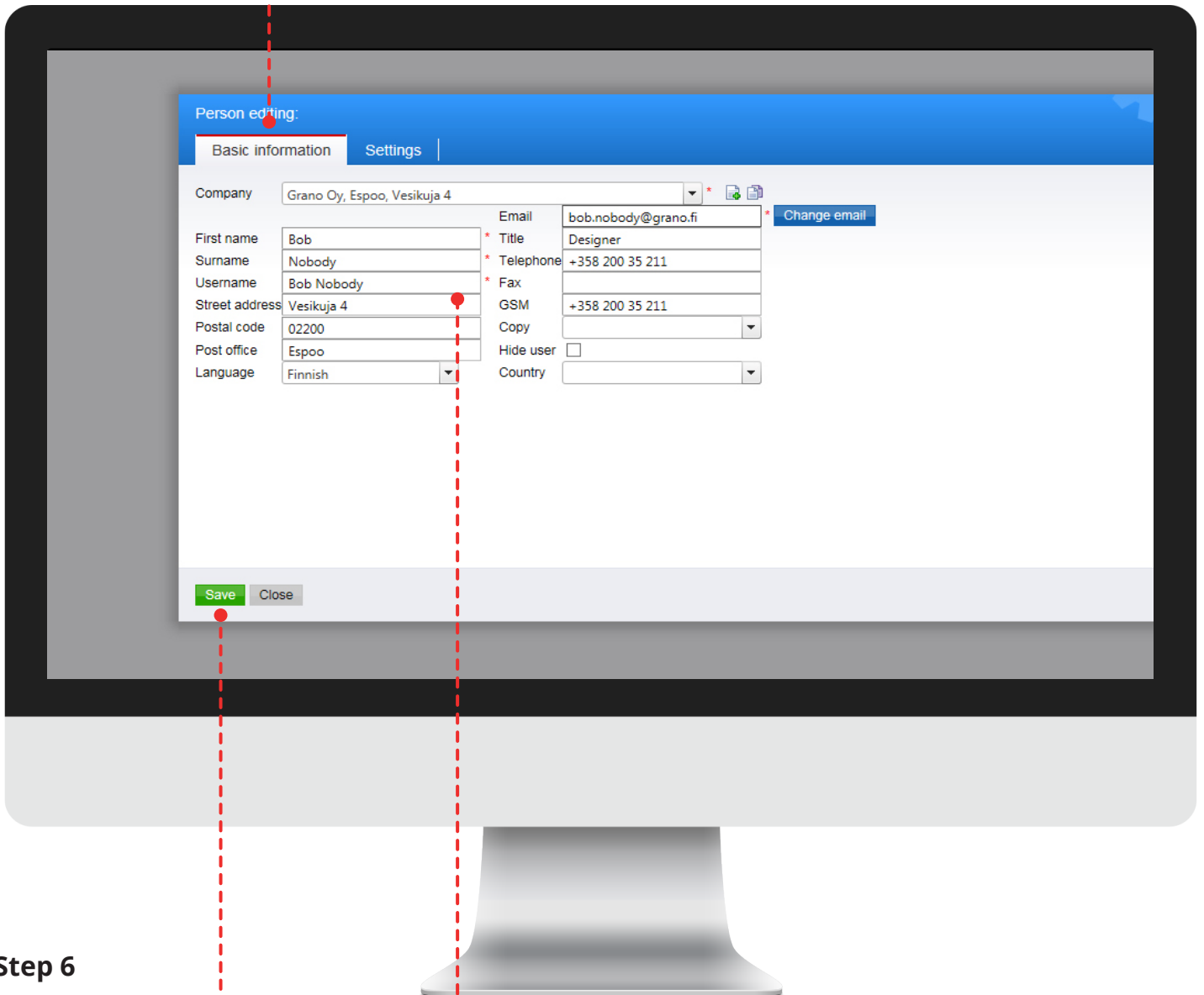
Adding a new user

Basic information

In the Basic Information -tab you can add a user's contact information to the selected company directory. If the address information in the company directory does not match, you can correct the contact information afterwards in the address field.

Step 5

SokoPro forms usernames automatically based on users' first and last names. Please make sure that there is only a single space between the user's first and last name.



Step 6

Save

Once you have entered at least the mandatory fields, click the Save button. The user is then saved to the company directory.

Please complete the following fields:

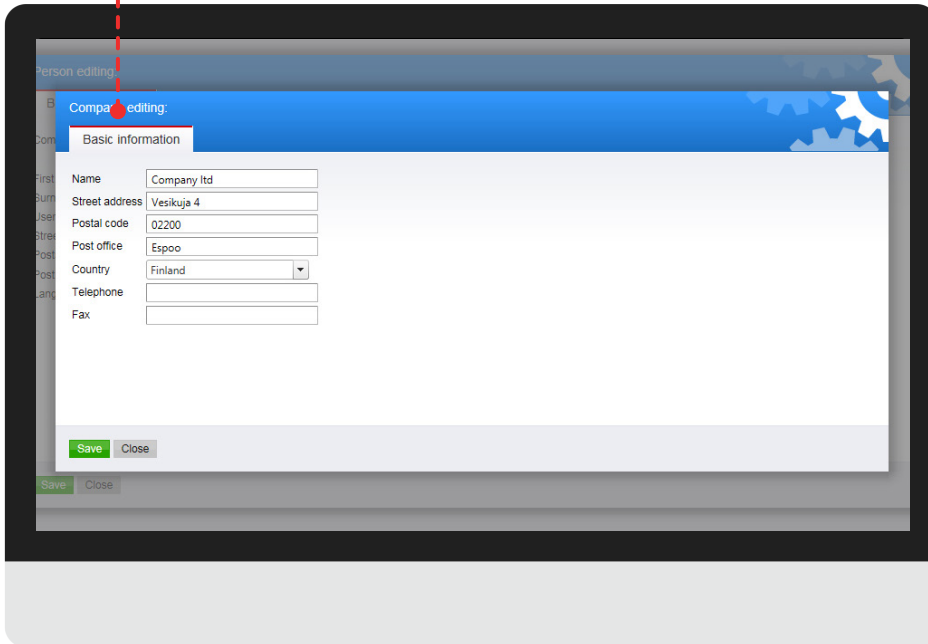
- First name (mandatory)
- Last name (mandatory)
- Username (mandatory)
- Street address
- Postal code
- City

- Language, Finnish by default
- E-mail (mandatory)
- Assignment
- Phone number
- Fax
- Mobile
- Country

Adding a new user

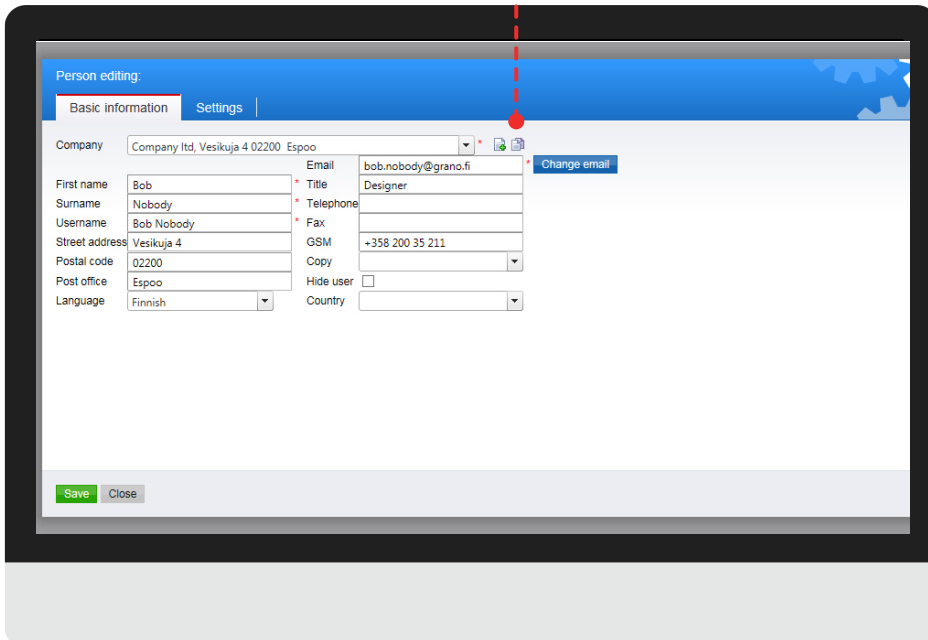
Add a new company

If SokoPro does not suggest an added user, click the *Add company* -button. Enter the company's basic information and click *Save*. After this SokoPro adds the user to the newly added company's company directory.

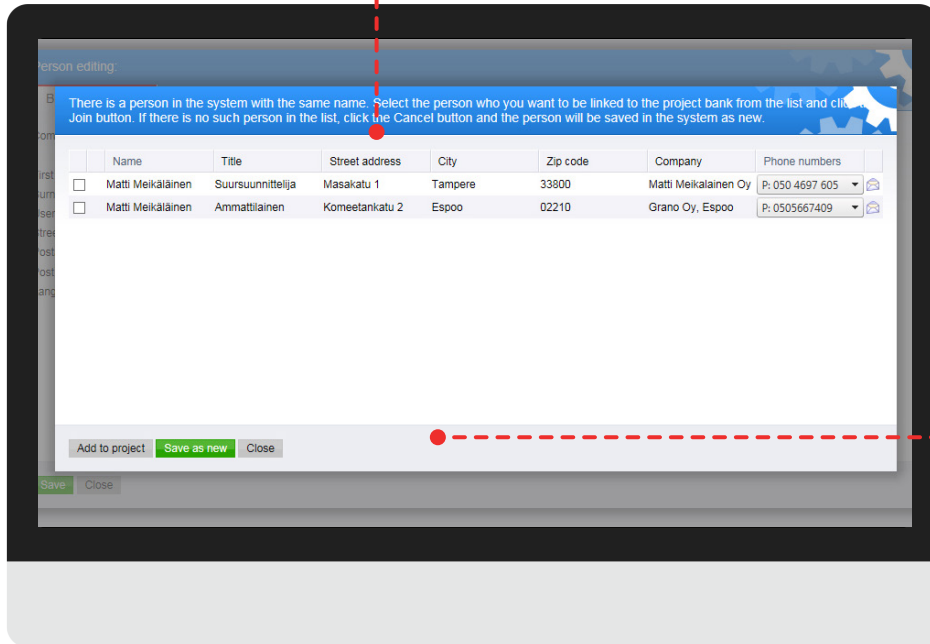


Copy the address

Be sure to copy the contact information so that print orders can be delivered correctly, then save the user to the project.



Adding a new user



A user in the system with the same name

If an existing project bank user is already using the same username, the system will notify you about this in a separate window.

If the information of the user suggested by SokoPro matches the information of the user you wish to add, check the left box and click the *Add to project* button.

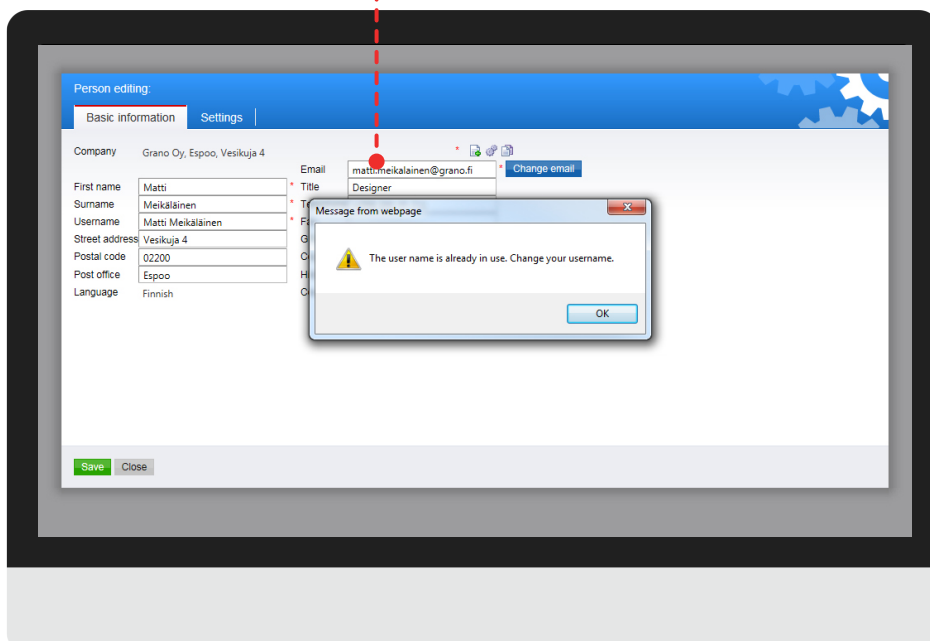
Save as new

If the contact information of the user suggested by SokoPro does not match the user you wish to add, only click the *Save as new* button.

After this the information you entered will be saved as new to the company directory.

Please note!

When you save a new party in the project bank, the system will automatically add the user to the project that you chose when you logged in to the SokoPro bank.



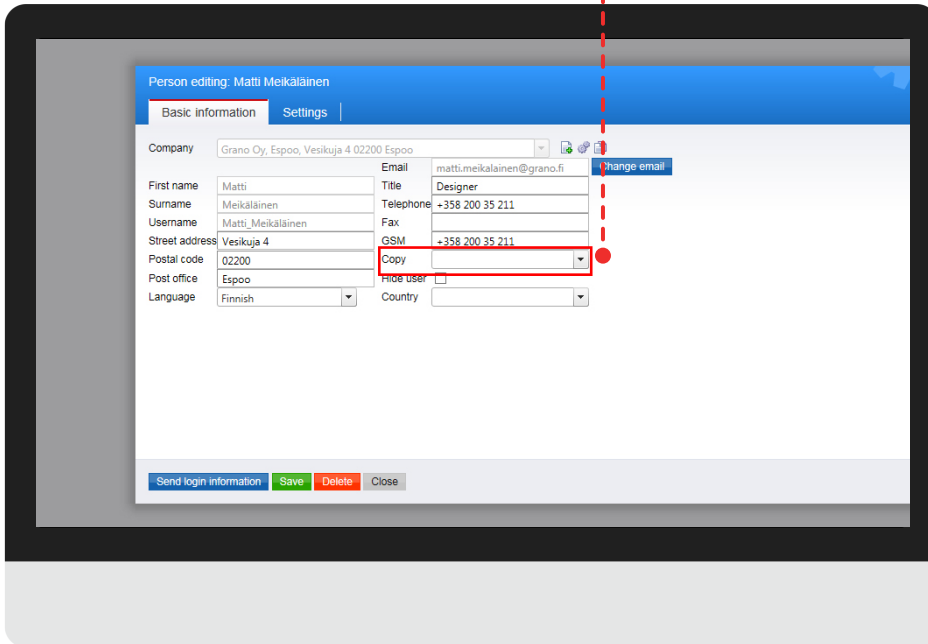
A user in the system with the same name

If there is already a SokoPro user with the same username, an error message is displayed. SokoPro allows multiple users with the same name but not multiple users with the same username. In other words you must make the username unique.

Click OK and change the user-name, for example to the first letter of the user's first name followed by their last name, and click the *Save* button. Continue until the system accepts the new user.

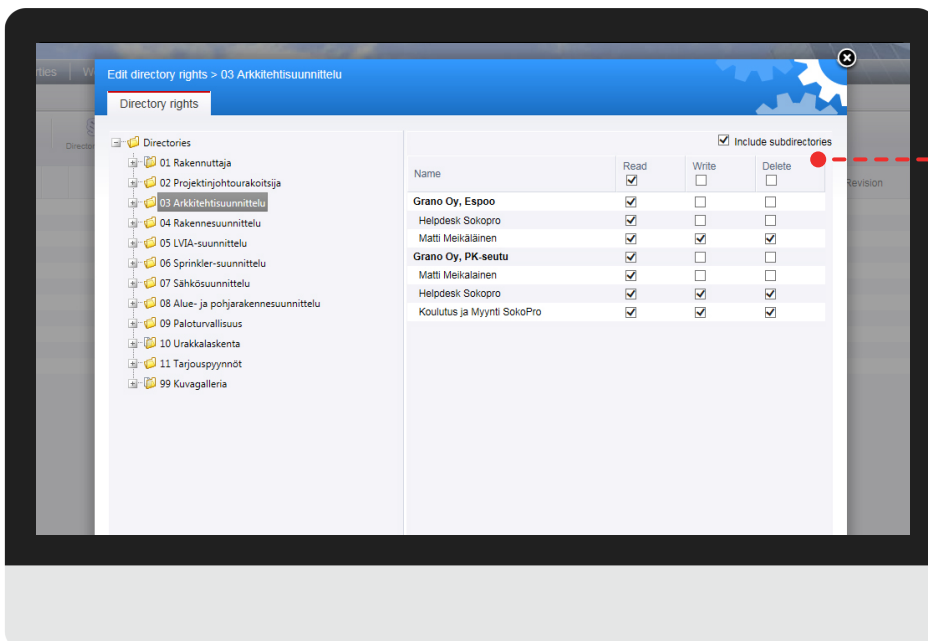
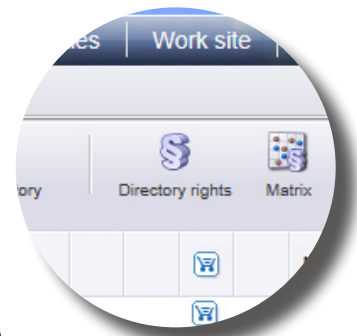
Adding a new user

Step 7



Folder Permissions

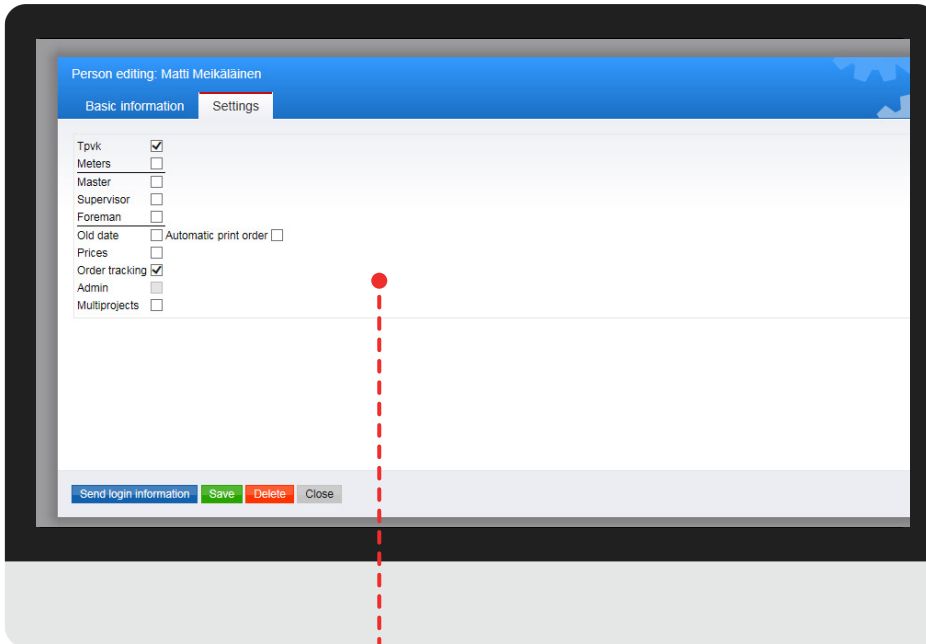
Click the *Copy* pull-down menu to bring up a list of different company representatives who have been linked to the project. You can copy directory rights from a user already linked to the project..



Directory rights

If you wish to edit directory rights manually, go to the *Files* tab and click the Directory rights icon. Here you can define users' directory rights in the project.

Adding a new user



Step 8

Settings

In the *Settings*-tab an admin user can define the following settings:

- Tpvk: read access to the site diary.
- Meters: read access to MVR and TR meters.
- Master: write access to the site diary.
- Supervisor: right to approve the site diary.
- Foreman: not used.
- Vanh. pvm: not used.
- Automatic print order: right to manage automatic orders.
- Prices: not used.
- Order tracking: right to view the status of print orders in the *Deliveries and ordering* tab.
- Admin: An administrator cannot give admin rights to another user. Admin rights are granted by the Helpdesk.
- Multiprojects: allows comparisons and summaries of MVR and TR measurements between multiple projects. Requires all the projects to have this feature enabled.

Files tab

New directory

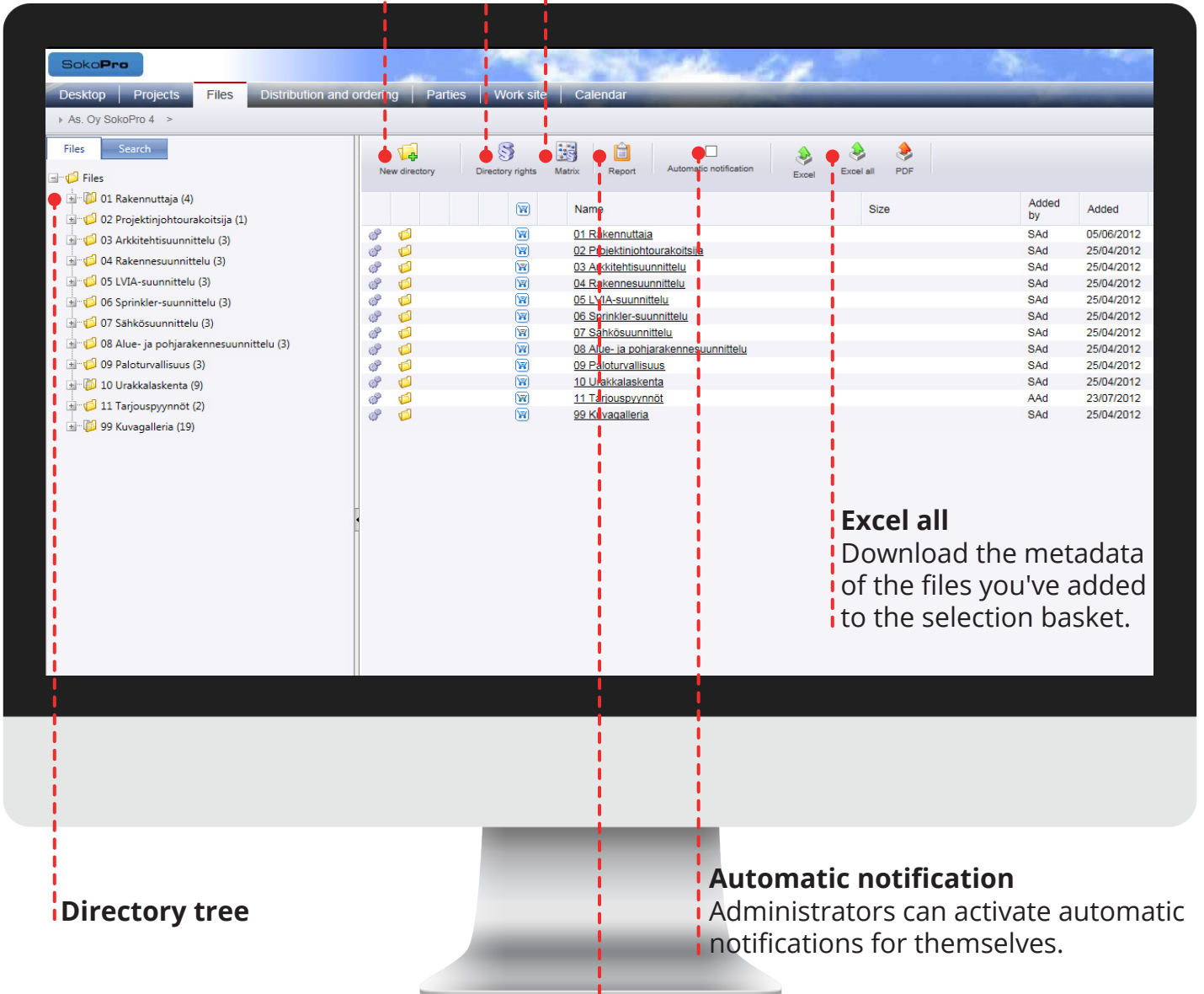
Create a new subdirectory in the active directory.

Matrix

View a table summary of the rights of all folders.

Directory rights

Edit users' directory rights.



Directory tree

Excel all

Download the metadata of the files you've added to the selection basket.

Automatic notification

Administrators can activate automatic notifications for themselves.

Report

Delivery of the directory files

Directory rights

From the directory tree you can define folder-specific rights for each user. To edit the user rights of a folder or subfolder, first click the folder.

The image below shows the admin user editing the user rights to folder 04 Rakennesuunnittelu. If the Subdirectories option is checked, the change will also affect the subfolders of the selected folder.

Define the user rights by checking the read, write or delete options.



Select the users or company and add rights. If you add user rights to a company, the same rights are given to all the company's employees. User rights can still be edited afterwards.

Please note!

If you did not copy user rights when creating a new username, by default the new user will have no directory rights. Directory rights are saved immediately when the option is checked.

With the help of directory rights you can restrict designers' rights to view folders or their contents. With reading rights a user can open and save a file to his or her own computer and order prints of the material. Editing rights give the user the right to save and edit the materials in the folder. The deletion right gives the user the right to delete files and folders from the project.

Matrix

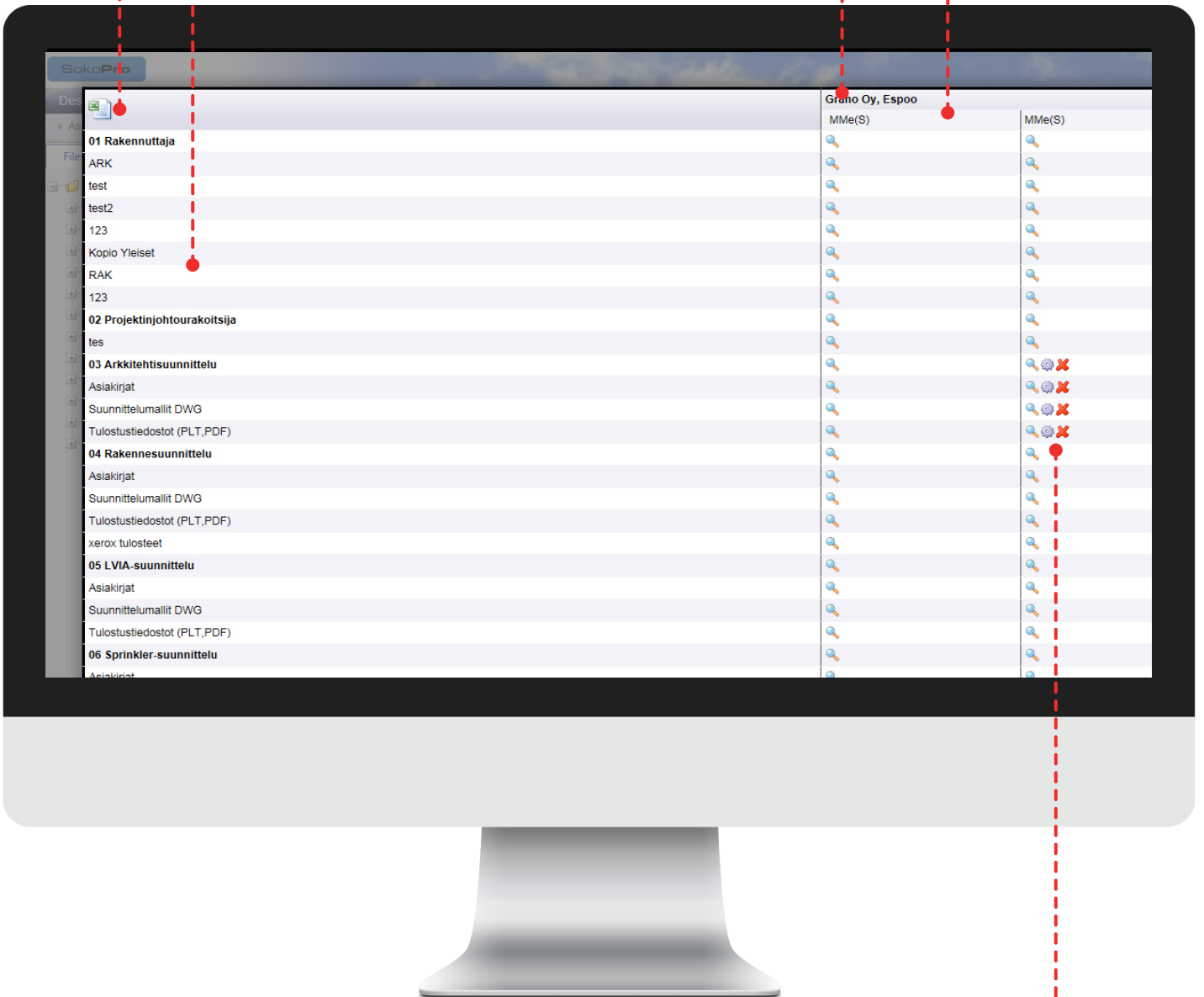
Matrix

Provides you with a summary of the user rights of all folders in a table.
Please note! If there are a large number of folders and users in the project, compiling the report may take some time.

Initial and user rights
 A=admin,
 T=construction diary,
 M=Master, V=Supervisor

Directory Tree

Users



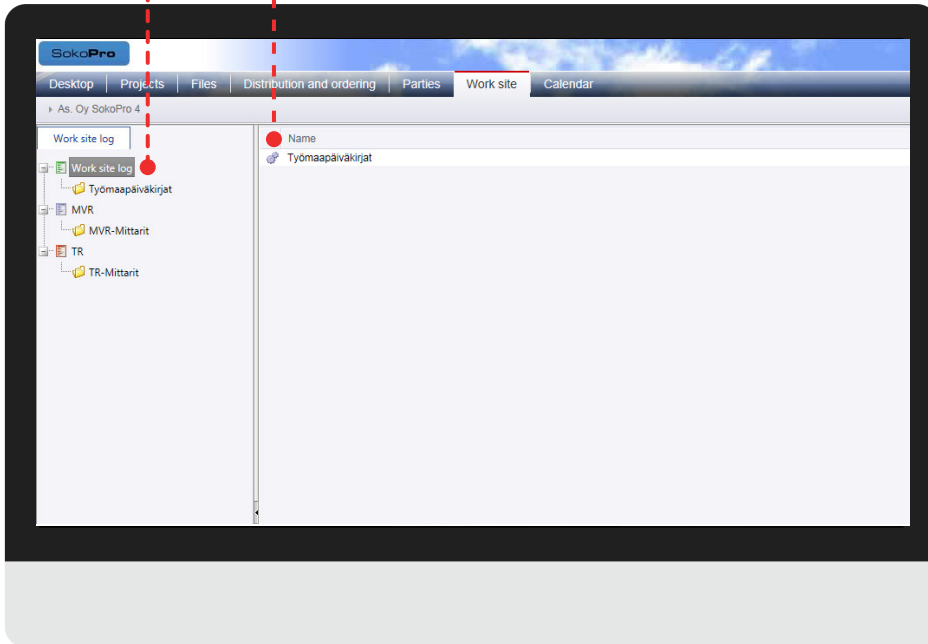
Symbols

Empty: no rights
 Magnifying glass: reading right
 Gears: editing right
 Red cross: deletion right

Construction diary

Rights

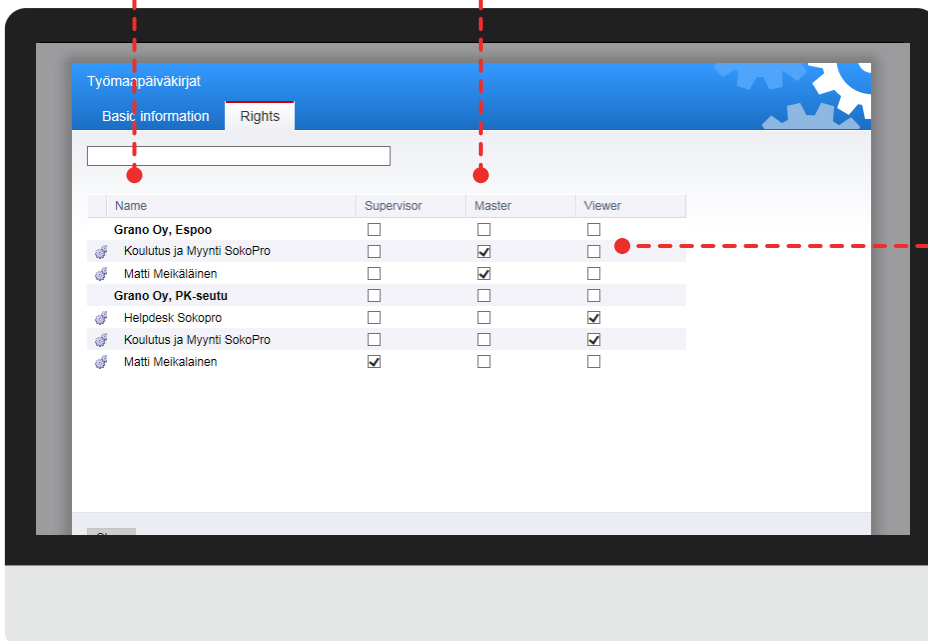
Through the *Work site* tab you can edit users' reading, editing and approval rights to the diary and meters. Go to the *Work site* tab and select Site diary. After this open the settings by clicking the gears icon.



Users

Rights

Site diary rights view. By default the window shows the basic information tab. Select the *Rights* tab.



Rights

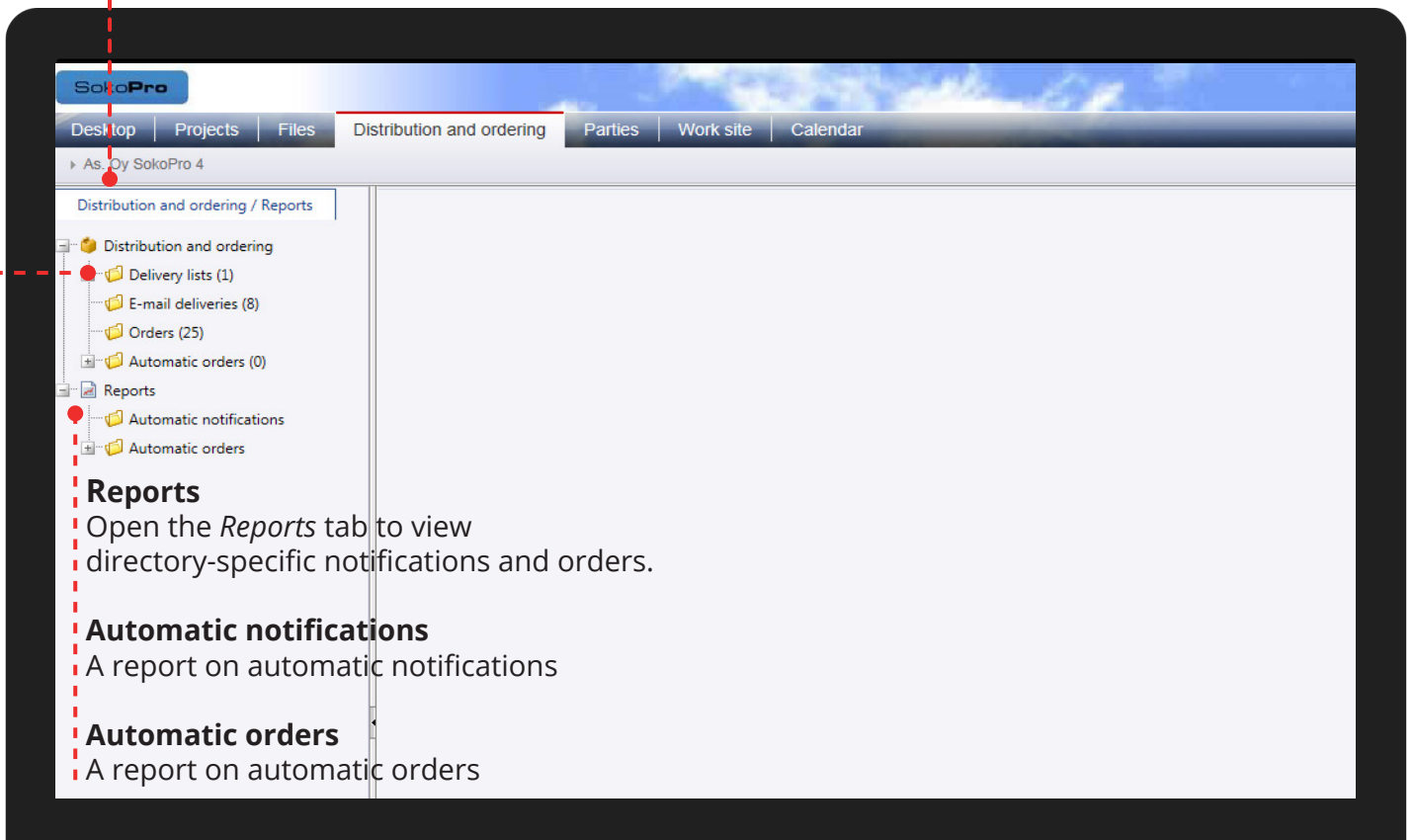
Add or remove checkmarks to change users' access rights to the site diary.

Deliveries and ordering

Distribution and ordering

The *Deliveries and ordering* tab includes four main folders, through which you can manage the orders made through the project bank and automatic notifications.

The *Reports* menu shows which project users are sent automatic notifications and automatic orders.



Delivery lists

The aim of the lists is to make placing orders faster for users.

Email deliveries

You can send messages to project parties as well as recipients outside of SokoPro.

Orders

You can renew an order or re-order previously ordered documents. This tool also allows you to view the project's ordering history.

Automatic orders

Manage automatic orders

Delivery lists

New folder

Order delivery lists into folders.

New delivery list

Create a new delivery list.

Automatic notifications

Manage folder-specific automatic notifications.

Import from the basket

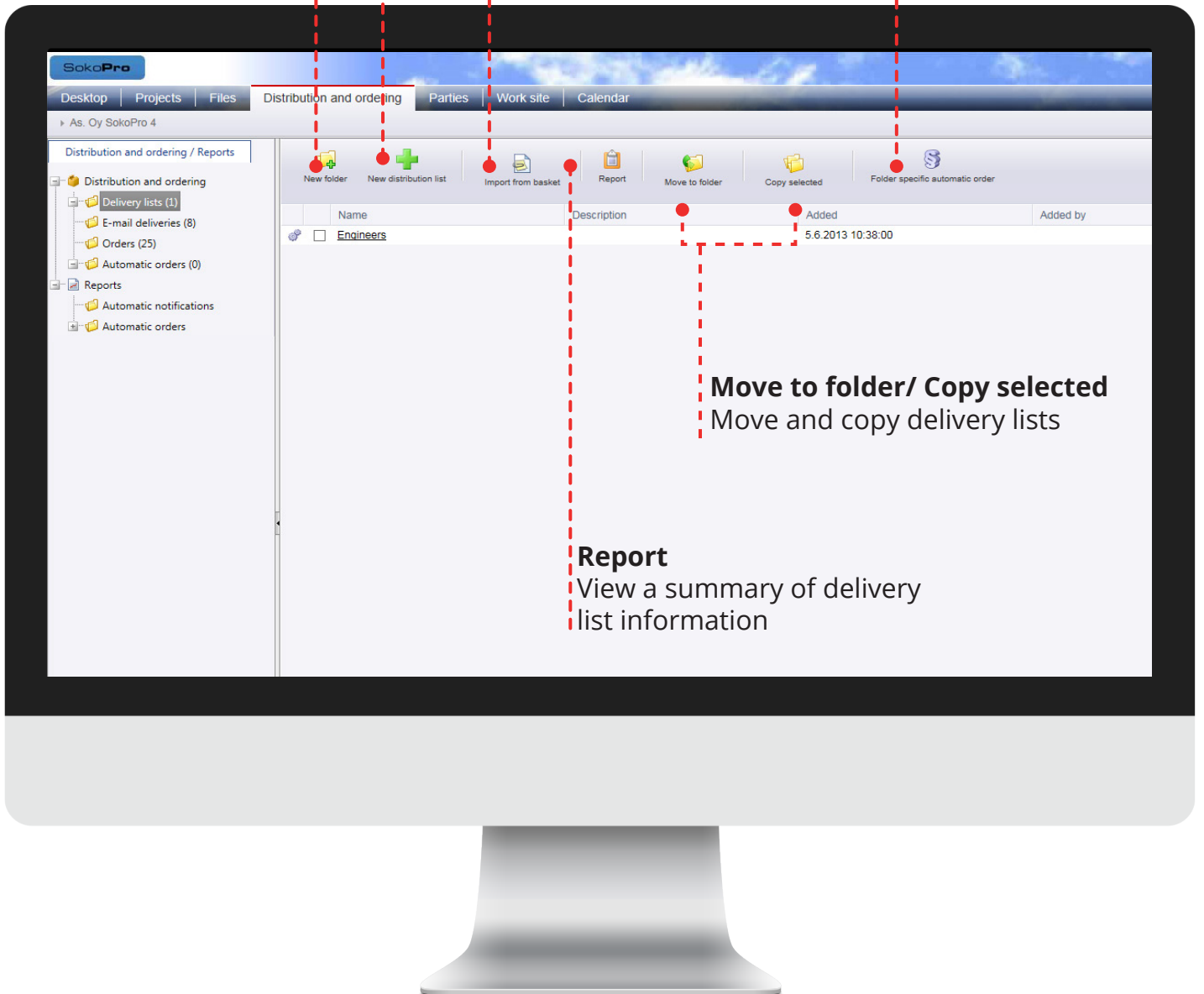
Move a file or files from the selection basket to the delivery list.

Move to folder/ Copy selected

Move and copy delivery lists

Report

View a summary of delivery list information

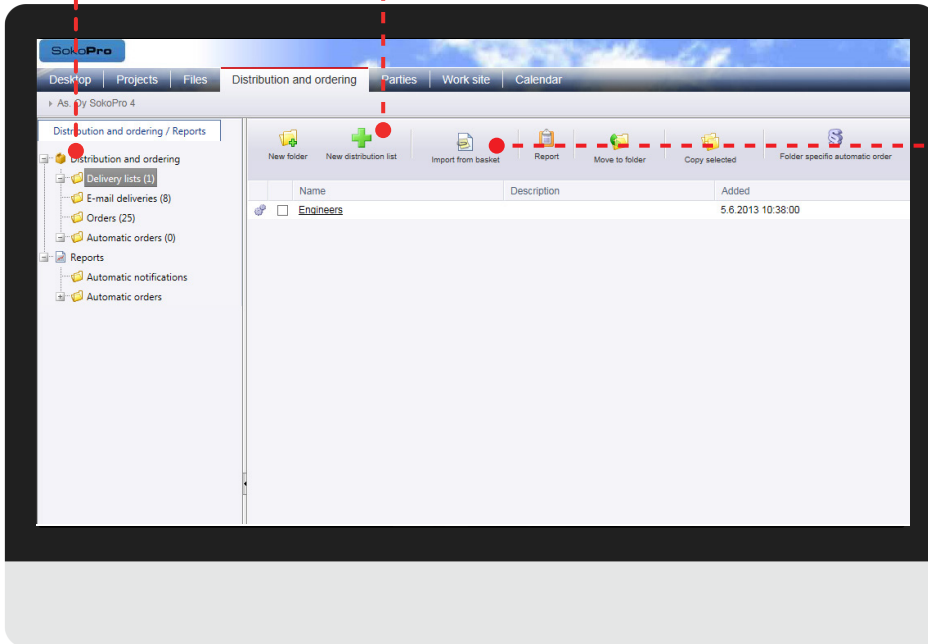


How to create a delivery list

Delivery lists

Go to the *Deliveries and ordering* tab and select the *Delivery lists* folder from the directory tree, which is located on the left. Next open the *Delivery wizard* by clicking the *New delivery list* button.

Step 1

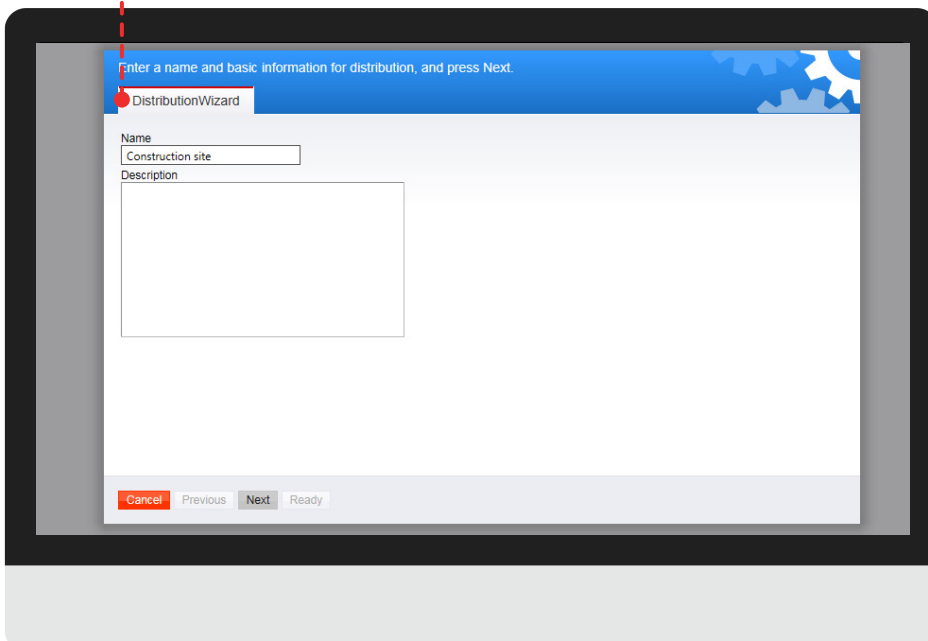


Import from the basket

Please note! If you wish to add files to the delivery list, first add the files to the selection basket before creating the delivery list. Alternatively you can add files to the delivery list using the *Delivery wizard*.

Wizard

Enter a name and a description for the delivery wizard if necessary. Then click the *Next* button.

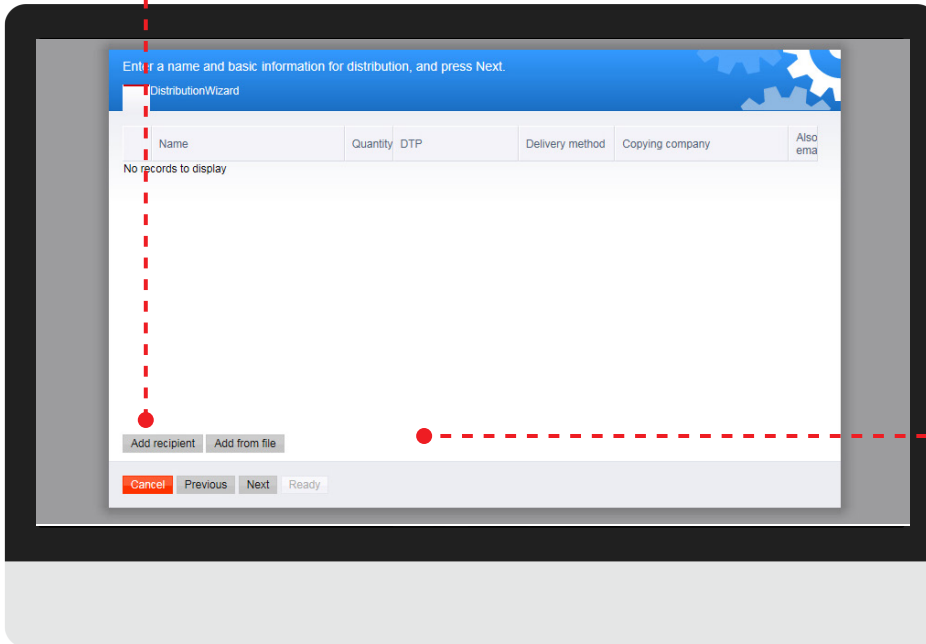


How to create a delivery list

Add recipient

Next add recipients for the delivery list.
Click the *Add recipient* button.

Step 2



Add from file

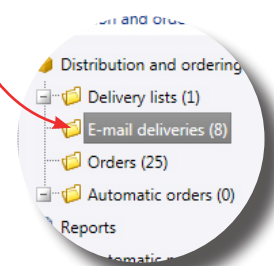
You can also import recipients from a txt file. The template can be seen below:

	A	B	C	D	E	F	G	H	I	J
1	*		Project name							
2	Name	Address1	Tel.	Contactperson1	Address2	Fax	Contactperson2	Address3	Address4	
3	Grano ltd	Vesikuja 4	20035211	Grano Multi	00100 Helsinki		Grano Multi		helpdesk@sokopro.fi	
4	Grano ltd	Vesikuja 5	20035211	Multi Grano	00100 Helsinki				helpdesk@sokopro.fi	
5										
6										
7										
8										

Template

The fields and headings must follow the order shown in the template even if some of the fields are left empty. Be sure to also include the * symbol in cell A1. Create an Excel template and enter the correct information. Save the file in *.txt format and find the file on your computer by using the Browse button. Save the information to the delivery list using the *Add from file* button. Check the contact information and click *Save*. You can utilise the delivery list in the Email delivery tool.

Please note! If you create the template in Excel, save the table as a txt file.

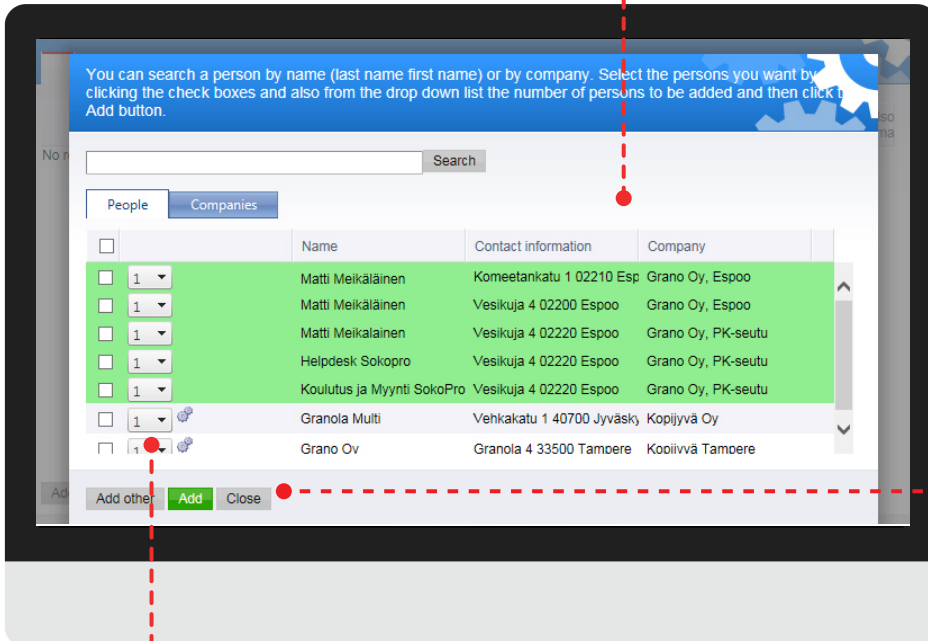


How to create a delivery list

Step 3

Wizard

Add recipients based on name or company. Select a recipient by checking the option on the left of the person's name.



Add recipient and close

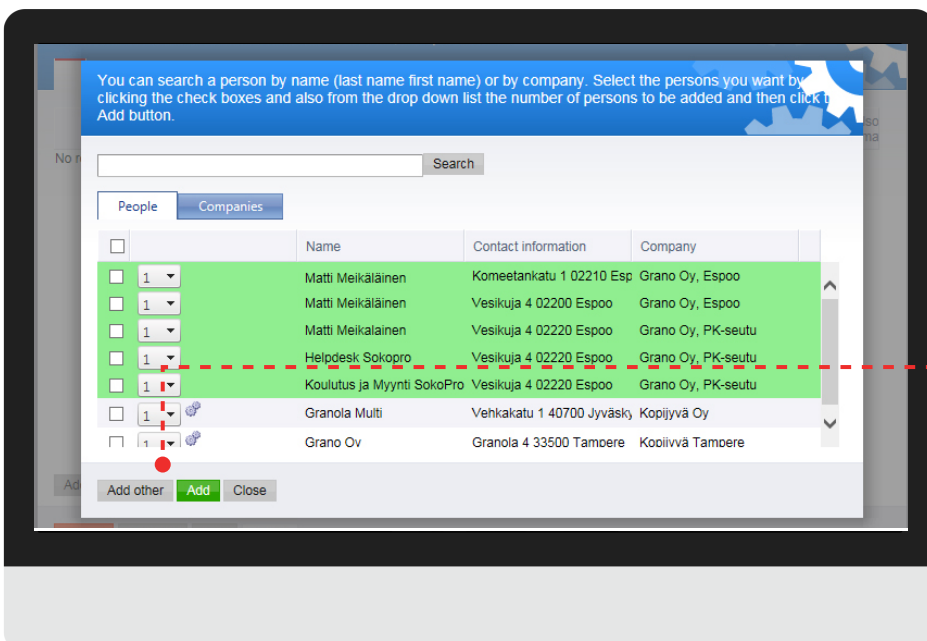
Select recipients and number of items. After this you can add recipients using the *Add* button. Next click the *Close* button.

The number of recipients

The number of items (pcs) indicates how many times the person is included in the print form, not the number of print series. Print series are selected in the next step. If you want a recipient to receive a series both with and without strips, you should indicate this by having two pieces in the box.

Add other

If you wish to add users from outside of SokoPro to the delivery list, click the *Add other* button and enter the recipients' information.

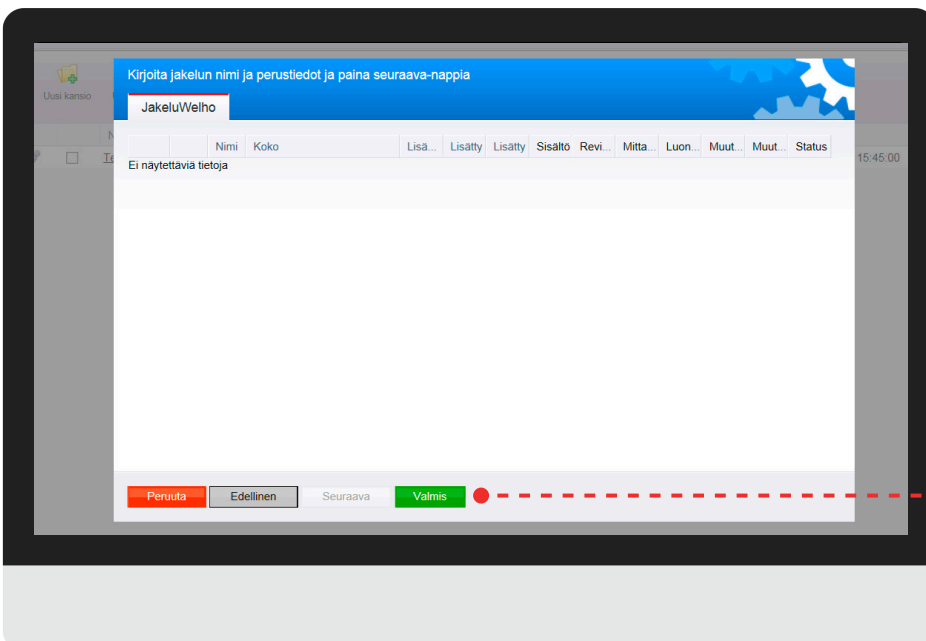
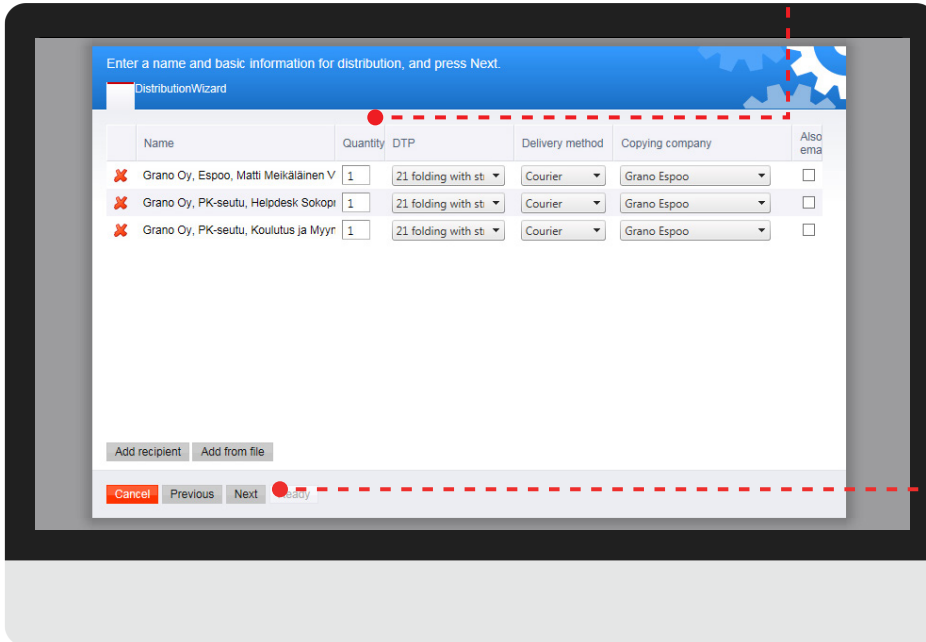


How to create a delivery list

Step 4

Quantity

Choose quantities, finishings, delivery methods and the service provider. After this click the *Next* button.



Step 5

Ready

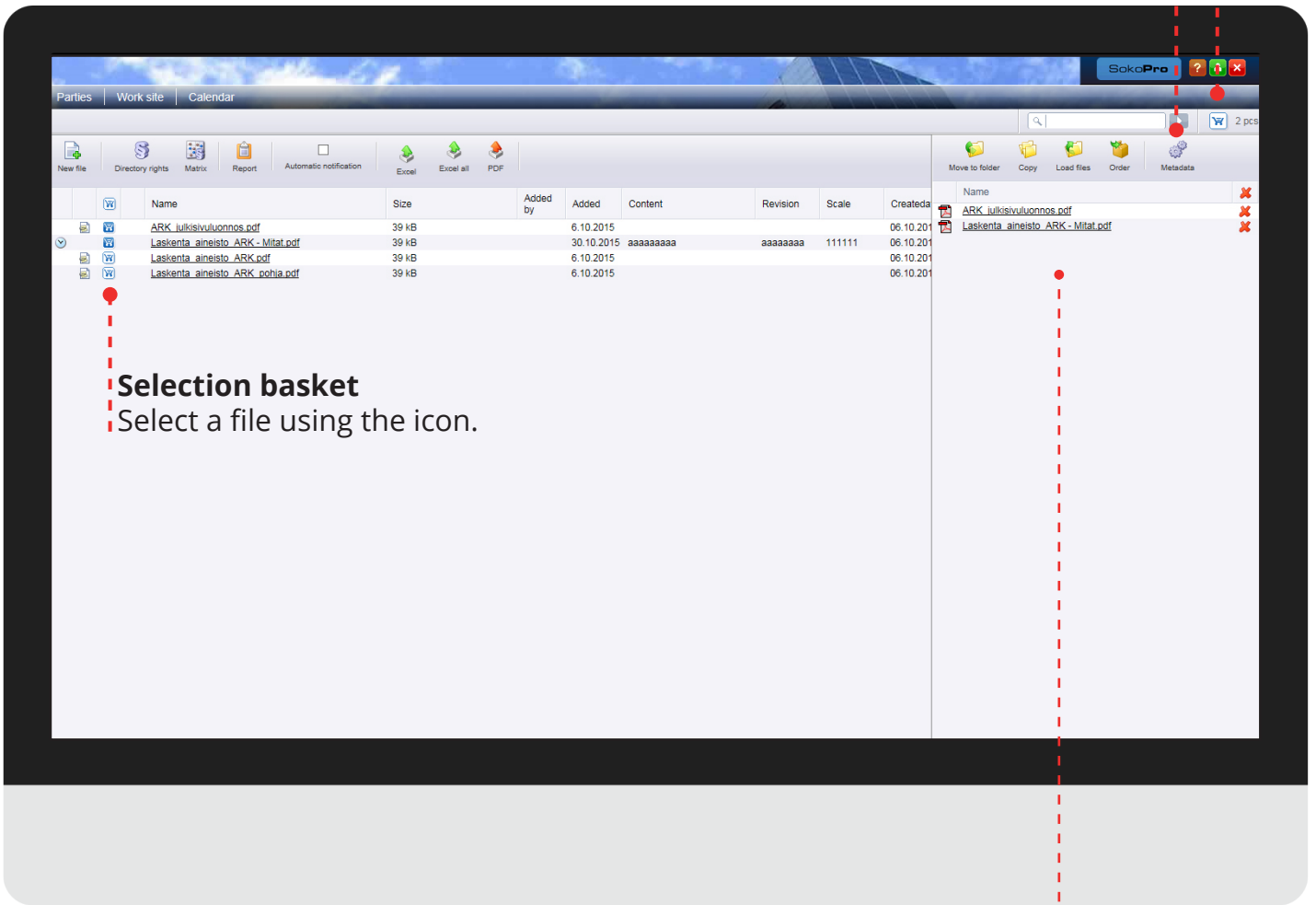
Save the delivery list you created by clicking the *Ready* button. After this you can use the delivery list when placing orders

Metadata editor

Metadata tool

With this tool you can edit the metadata of several files at once. For example, you can change the revisions of saved files.

Shopping cart



Selection basket

Select a file using the icon.

Metadata

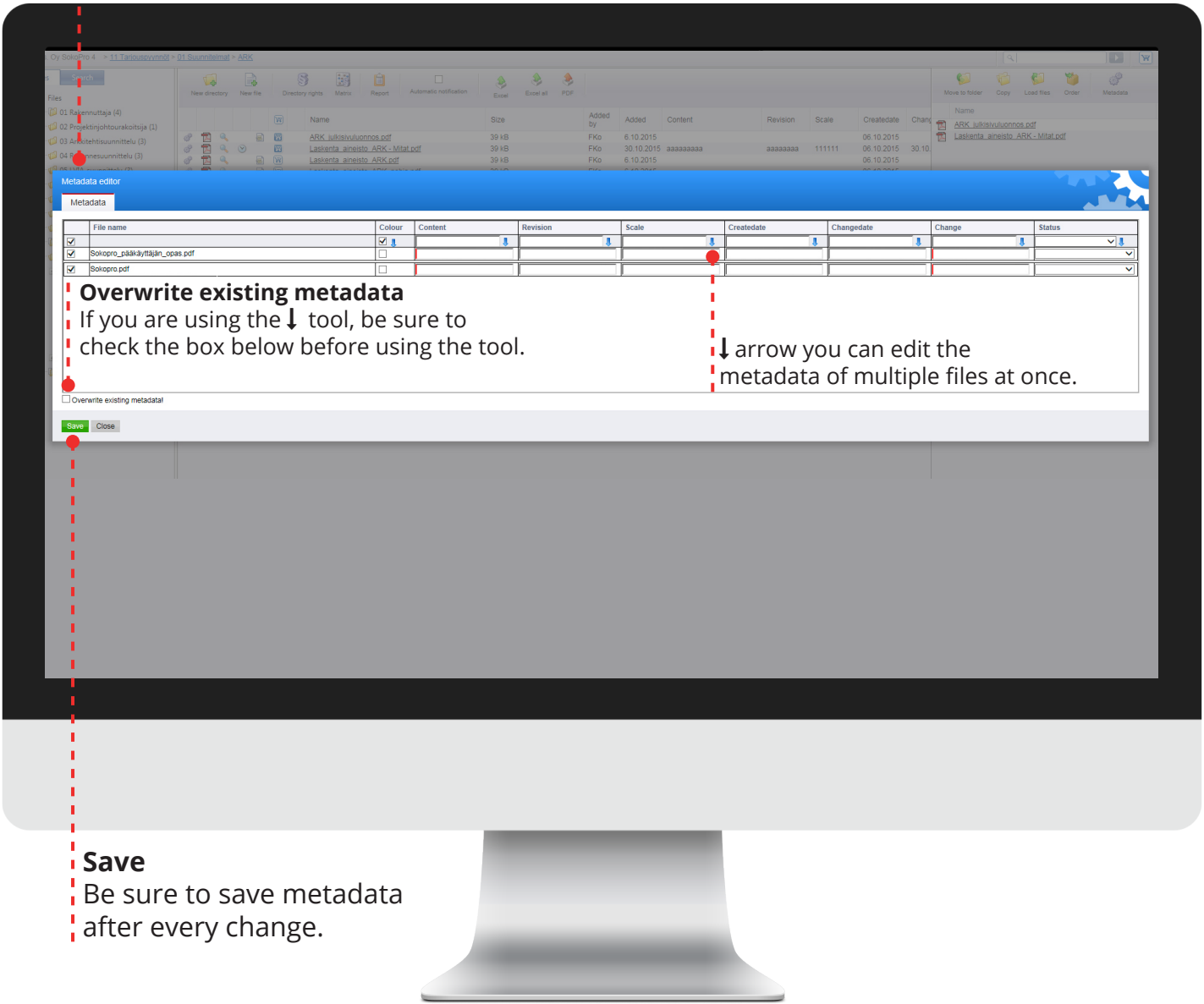
Use the selection basket to select a file and edit its metadata. Open the selection basket using the shopping cart icon located on the upper right-hand corner.

After this you can view the selected files in the selection basket. Click the *Metadata* button to edit the files' metadata.

Metadata editor

Metadata Editor

The example below shows the *Metadata* tool in its entirety. You can edit different fields and save the files and their updated metadata in the SokoPro service.



Save

Be sure to save metadata after every change.