

Tracker Document Integration Datasheet

04 April 2023

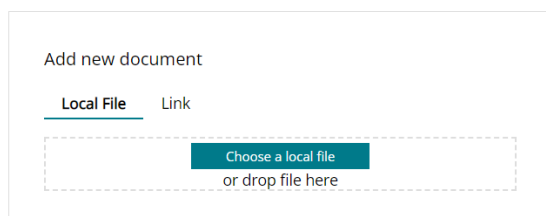
Summary

Flo10 Project Tracker is an intelligent task platform for organisations wanting to achieve project compliance and improve information capture. Flo10 integrates with SharePoint/One Drive, Network Shares and Deltek PIM, to provide quick access to your project files and automatically publish documents linked to tracker tasks.

Integration

Each type of document integration can be configured to automate the publishing of documents to your chosen file repository.

SharePoint

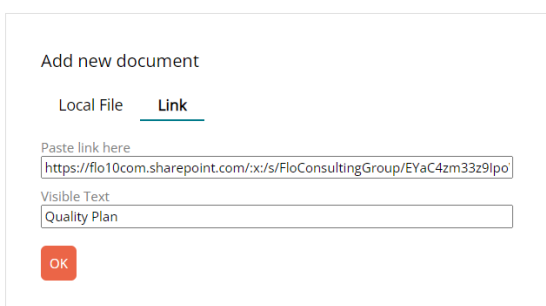


Add new document

Local File Link

Choose a local file
or drop file here

Documents can be added to a tracker task by using drag and drop, or by navigating to the file locally.



Add new document

Local File Link

Paste link here
<https://flo10com.sharepoint.com/x/s/FloConsultingGroup/EYaC4zm33z9lpo>

Visible Text
Quality Plan

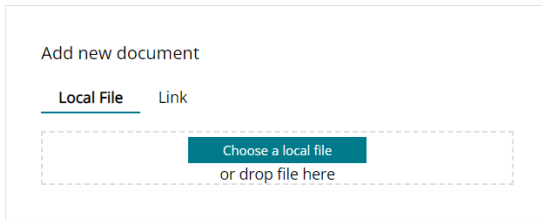
OK

When using this method Flo10 can automatically publish this document to a SharePoint folder. The specific folder can be driven from the relevant project and/or the selected task. If the folder does not exist, then Flo10 will generate this for you. On completion of the published document, Flo10 will **convert** the uploaded document within the task to a **live SharePoint link**.

It is also possible to add a SharePoint link directly into a task. This can be done by pasting the SharePoint link and providing a display name.

When using either of these methods, the document displayed within the task is always a live link to SharePoint. Therefore, if the document was updated within SharePoint these changes can be accessed via the Flo10 task.

Network Shares

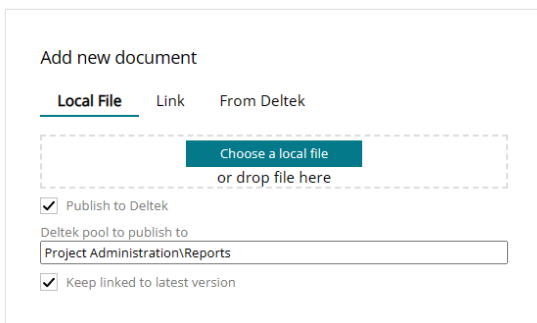


Documents can be added to a tracker task by using drag and drop, or by navigating to the file locally.

When using this method Flo10 can automatically publish this document to a mapped Network Share. The specific folder can be driven from the relevant project and/or the selected task. If the folder does not exist, then Flo10 will generate this for you. On completion of the published document, Flo10 will **retain** the uploaded document within the task.

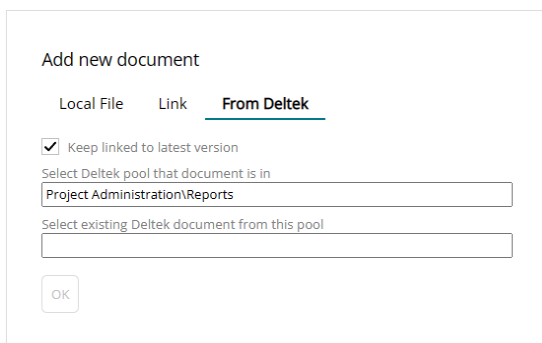
When using this method, the document displayed within the task is independent. Therefore, if the document is updated within the Network share, then the updated document would need to be re-uploaded to the task.

Deltek (On Premise) PIM



Documents can be added to a tracker task by using drag and drop, or by navigating to the file locally.

When using this method Flo10 can automatically publish this document to a Deltek pool. The specific pool can be driven from the relevant project and the selected task. On completion of the published document, Flo10 will **convert** the uploaded document within the task to a **live Deltek link**.



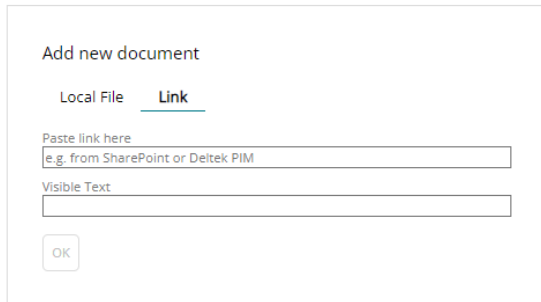
In addition to the above, you can navigate or search for an existing file from within a Deltek pool by using Flo10's 'From Deltek' option. When a document is selected Flo10 will create a live Deltek link within the task.

When using either of the above methods, there is an option to 'keep linked to the latest version'. If selected, the document displayed within the task will always be linked to the latest Deltek version. Therefore, if the document is versioned within Deltek these changes **will** be accessed via the Flo10 task. Flo10 uses an (*) asterisk to highlight if a linked document is the latest version.

If unselected, Flo10 will retain the original linked Deltek version. Therefore, if the document is versioned within Deltek these changes **will not** be accessed via Flo10 Task.

Deltek (Cloud) PIM

Deltek Cloud does not permit a direct database connection, which reduces the level of Flo10 integration compared to Deltek On Premise. If using Deltek Cloud, documents can still be added to a tracker task by using drag and drop, or by navigating to the file locally. However, these documents **will not** be published to the Deltek pool and will exist only in the Flo10 repository.



Add new document

Local File Link

Paste link here
e.g. from SharePoint or Deltek PIM

Visible Text

OK

Best practice is to add a Deltek link directly into a task. This can be done by pasting a link (to an existing document within a Deltek pool) and providing a display name.

By default, the pasted Deltek link will always be linked to the latest Deltek document version.

Therefore, if the document was versioned within Deltek, the version with these changes **will** be accessed via the link from the Flo10 task.