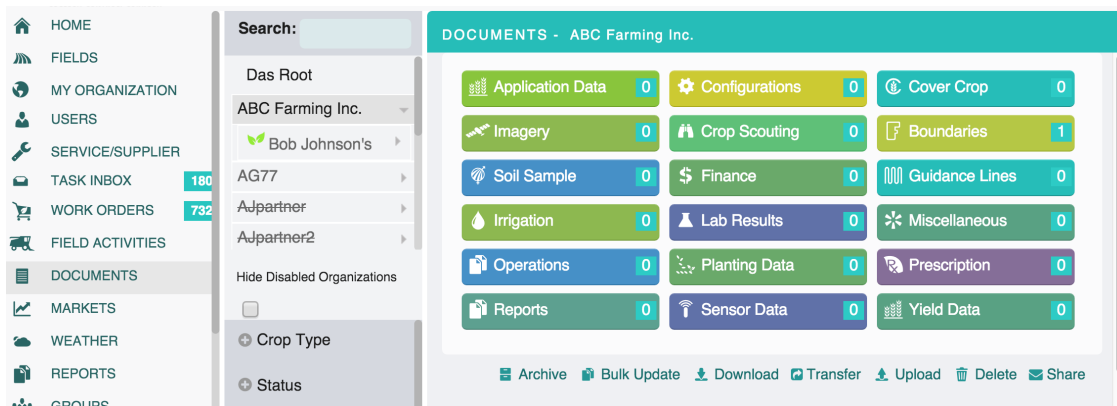# Chapter 8-Documents

The documents page allows you to view all the documents associated with work orders and fields in the software.

8.0 Documents

-On the top left of the documents page is a navigation bar that will allow you to search for the Owner, dealers, growers, farms, and fields that exist in your organization


-Click on the small arrow to the right of the Organizations name, to get to the correct level or hierarchy
-Once you have the desired level in the hierarchy, the page will only display documents for that user.
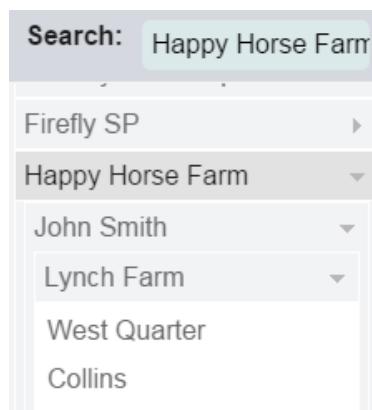
-Alternatively, you can search for the desired user by typing in your user's name in the search bar
-Click on the user's name to successfully navigate to that user in the list

-To find a document, choose the category the document belongs to.
-Select it from the color coded list.
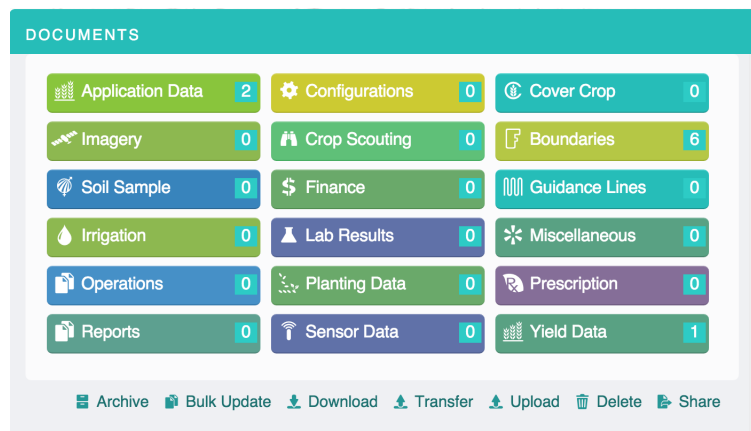
-Once a document type is selected, the document list will populate with the corresponding document type.
-For example, below 'Application Data' was selected and the following list was populated.
-To select a file, click on it to view the details for that page
-Multiple files can be selected at once by clicking on the check box on the far left of the screen.

-You can download a selected document or multiple documents by clicking on the ⬇ on the far right.
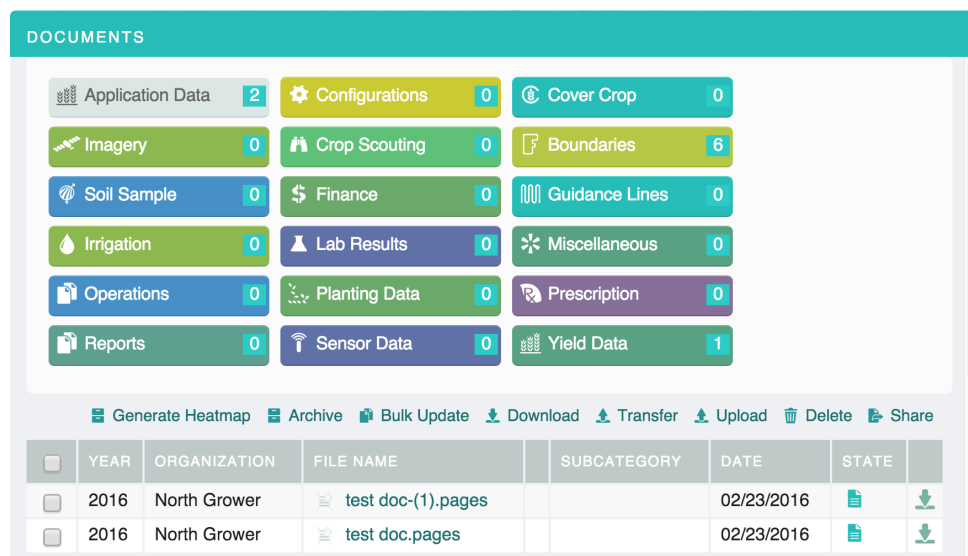
-At the bottom left of the page is a drop down menu showing how many users are being displayed out of the total number of work orders.

10 ▾ Showing 1 to 10 of 15 entries
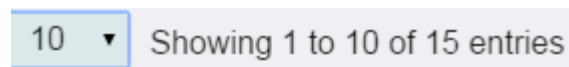
-Click on the drop down menu to display different options for the amount of documents displayed on each page.

10
20
50
100
50 ▾
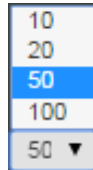
-To load the next or previous page of documents use the page navigation bar at the bottom right of the screen
-To change the page of documents, click on a different number to jump to the page or hit the next button to navigate to the page that is directly next in line

Previous 1 2 Next

-There is an additional filter for the documents available at the bottom left of the documents page
-Clicking on the ⊕ will expand the filter option
-Clicking on the ⊖ when the list is expanded will collapse it

⊕ Crop Type

⊕ Status

⊕ Document State

⊕ Date

⊕ Hidden Files

⊕ Crop Year
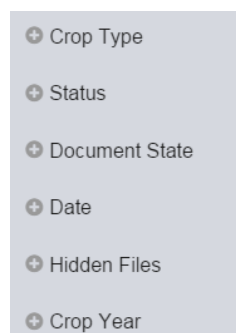
-Click on the 'crop type', this will expand the menu to show a list of crop types
-Selecting one of these crops will cause the documents list to only display documents with the selected crop types
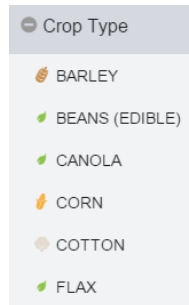

The status filter allows you to filter documents based on whether their status is set to be active or archived
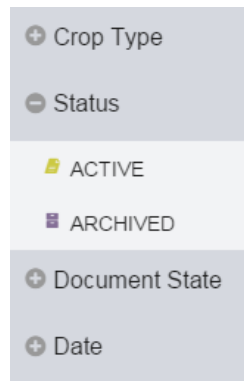

-The document state allows you to filter documents based on their current completion status
-The status will show up as original, processed, or other
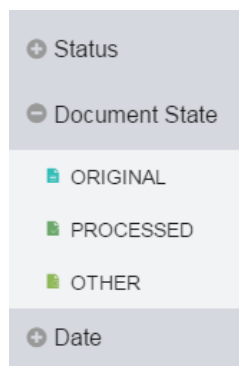
-The date filter allows you to filter document results based on the timeframe in which they were created
  -The 'All' option will show all the documents that were created under the category that was selected
  -The 'Last day' option will display only documents made in the last 24 hours
  -The 'Last week' option will display only documents made in the last seven days

```
⊕ Status

⊕ Document State

⊖ Date

   ALL

   LAST DAY

   LAST WEEK

⊕ Hidden Files
```
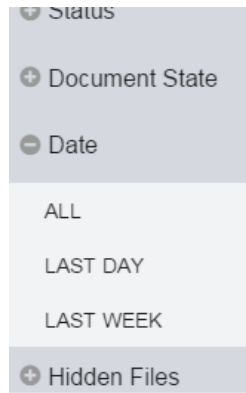
-The hidden files filter will show files that were automatically unzipped or loaded into the software from files that had previously been loaded in
-To view these files, expand the hidden files filter and select show all

```
⊕ Document State

⊕ Date

⊖ Hidden Files

   SHOW HIDDEN FILES

⊕ Crop Year
```
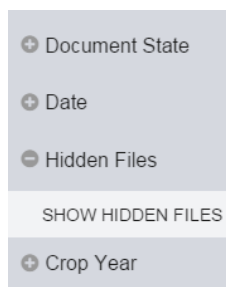
-The crop year filter will allow you to limit the document list to specific documents that occurred in a specific crop year

```
⊖ Crop Year

   2015

   2014

   2013

   2012

   2011
```

-The documents page also provides several different functions that can be performed on selected documents.
-This list can be found directly beneath the color coded document category list

☰ Generate Heatmap   ☰ Archive   ▣ Bulk Update   ⬇ Download   ⬆ Transfer   ⬆ Upload   🗑 Delete   ➦ Share

8.1 Generate Heatmap

-The 'Generate Heatmap' is only available on the Application Data, Planting Data, Yield Data, and Sensor Data documents

      -The other actions are available on each document type

-To generate a heat map you will want to click on the generate heat map option
-This will bring up a window asking to import documents to generate a heat map
-It is looking for a shape files, shape files include .shp .shx and .bdp as a bundle or a .grd grid file
-You can select a shape file bundle in the list beneath the generate heat map window by checking the check box to the left of the file list

-Once the shape file is selected, it will show up in the box under 'Documents to Generate Heatmap'
-Click the ✖ Clear to remove all files from the 'Documents to Generate Heatmaps' or click the
🗎 Generate Heatmaps button to generate the map

-After you click create Heat map, you may get the below message
-It can take anywhere from thirty minutes to twenty-four hours for our processing server to generate a heat map
-When it is completed, it will be available under the field in the Fields page

8.2 Archive Documents

-The 'archive document' option will allow a file to be archived for future use
-Archiving a file will remove it from the active documents list and place it under the archived category
-This allows the document to be stored in an area where the information can be access but without it showing up with the other active documents
-This can be useful if the document is done being used, but want it saved for future reference.
-To archive a document, check the box on the far left of the document
-The document selected will show up in the box under 'Documents to Archive'
-From here, click the ✖ Clear icon to remove all files from the 'Documents to Archive' list or click the
🗐 Archive button to set the document's status to archived

	YEAR	ORGANIZATION	FILE NAME		SUBCATEGORY	DATE	STATE	
☐	2016	North Grower	test doc-(1).pages			02/23/2016	📄	⬇
☐	2016	North Grower	test doc.pages			02/23/2016	📄	⬇

Archive Documents

Document(s) to Archive (check boxes in list below)

20 ⬍ Showing 1 to 2 of 2 entries   Previous 1 Next

-The archived documents can be viewed by setting the status filter to the archived selection

⊕ Crop Type

⊖ Status

  🗐 ACTIVE

  ▤ ARCHIVED

⊕ Document State

⊕ Date

8.3 Bulk Update Documents

-The 'Bulk Update' option will allow multiple files to be uploaded at the same time
-To access the bulk update option, select a document type and then click the 'bulk update' icon underneath the document types

-The 'Documents to Update' box will be populated once a file type is selected from the documents

-The documents are further filtered as the information is entered into the fields

-'Organization' refers to the organizational hierarchy that the documents will belong to

-Select the Organization that the data will be retrieved from, either a Service Provider, Dealer, Grower, Farm, or Field

-Click the drop down next to 'Category' to select what the documents will be updated as

-Click the drop down next to 'Documents State' this allows what the documents will be set to

     -'Original' is a document taken from the field

     -'Processed' is for a document that has already been entered into the system and worked on

     -'Other' is for a document that does not fall well into either the original or processed categories

-Click the drop down next to 'Crop year' to select the crop year the documents were created in

-Click the drop down next to 'Crop Type' to select the crop type for the documents that are be updated

-Click the check box next to the files that should be updated

-Once all the fields that should be updated are filled out click the update button ☑ Update to update the selected documents with the new information that has been provided

-If the information is not correct, click the ✖ Clear button to reset all the fields and documents, or alternatively click the close button ✖ Close to exit out of the bulk update entirely

8.4 Download Documents

-The 'Download' action will allow multiple documents to be downloaded at the same time
-To access the download function, click on the documents button for the category of documents that are to be downloaded
-That will bring up all documents under that heading
-Click on the grey checkboxes on the left to select the files to download
-Once all the correct files are selected, click the ⬇ Download button
-Or unclick the selected files to remove from the list before the Download button is clicked

8.5 Transfer Documents

-The transfer action allows files to be transferred from the software into the John Deere system
-The transfer action can be accessed by clicking on the transfer icon on the action bar beneath the color coded document filters
-Select a document type that you want to transfer
-Click the check box on the far left side to select that file to be transferred
-Only one file at a time can be transferred
-Click 'clear' to reset all the selected file documents
-Click 'Close' to exit out of the transfer action entirely
-Click the 'start transfer' button to begin the transfer process or clear or close it

8.6 Upload Documents
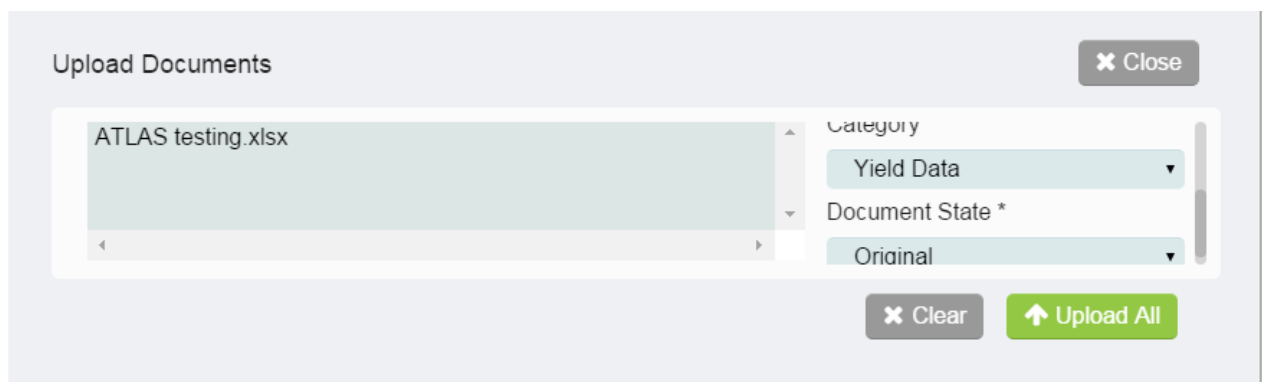
-The upload action will allow documents to be uploaded from your device into the software
-To access the upload option click on the upload icon on the action bar located beneath the color coded document filters
-Click on the 'add file' button **+ Add Files**
-This will bring up a window which will allow files to be uploaded from the device
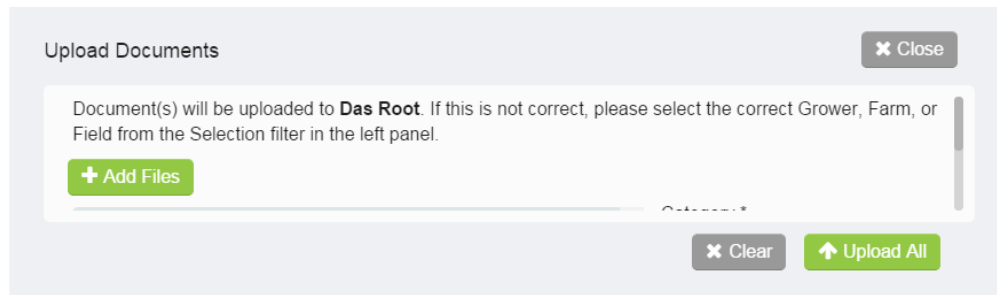
-If you hold control or command as you click, multiple files can be upload at once
-Alternatively you can hold shift as you click to select all files between the first file that was clicked and each subsequent file that was clicked on
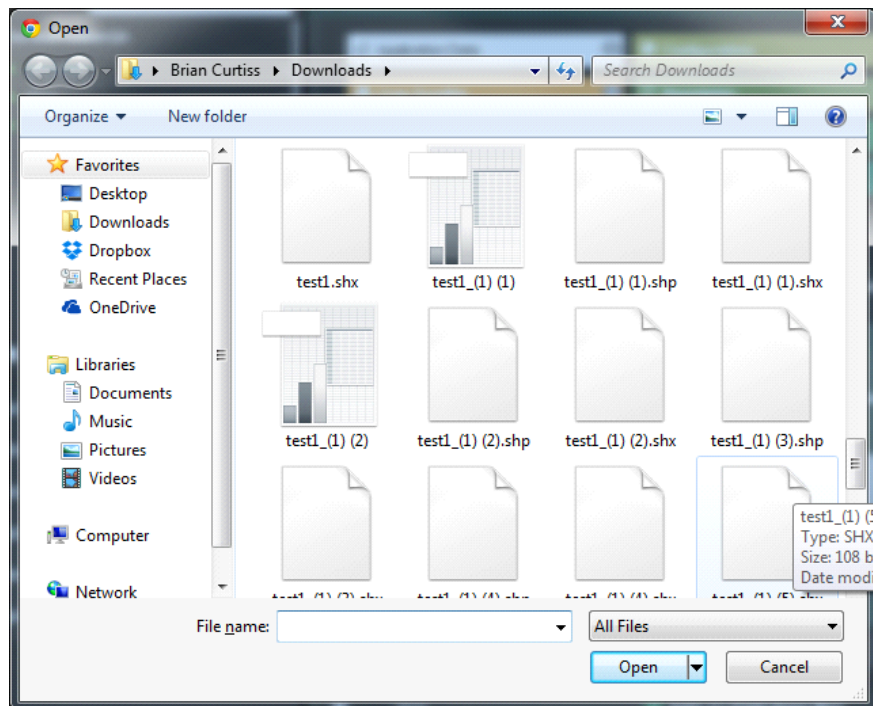
-Once the files have been selected, they appear in the 'Upload Document's under the 'add file button'
-Click the drop down arrow next to the 'Category' to select which heading the document will appear under when the uploaded is complete
-Click the drop down arrow next to the 'Document state' to select in what state the document was uploaded
    -'Original' if its raw data
    -'Processed' if it is data that has already been processed
    -'Other' if the document does not fit easily into either category

-Once all the files have been selected, the category and document states filled out, click the [↑ Upload All] button to upload the selected documents into the software
-If something is incorrect, click the 'clear' button to reset all the selected file documents or click the 'close' button to exit out of the upload action entirely

8.7 Delete Documents

-The 'Delete Documents' action allows one or multiple documents to be deleted at once
-Select the files to be deleted by clicking on the small grey checkboxes on the far left of the document list
-Once checked, click the Delete button on the action bar beneath the color coded document filters
-The document will appear in the 'Delete Document' box
-Once all the documents that should be deleted are selected, click the 'Delete' button to remove the selected documents from the software
-Or click the clear button to reset all the selected file documents or click the 'close' button to exit out of the Delete action entirely
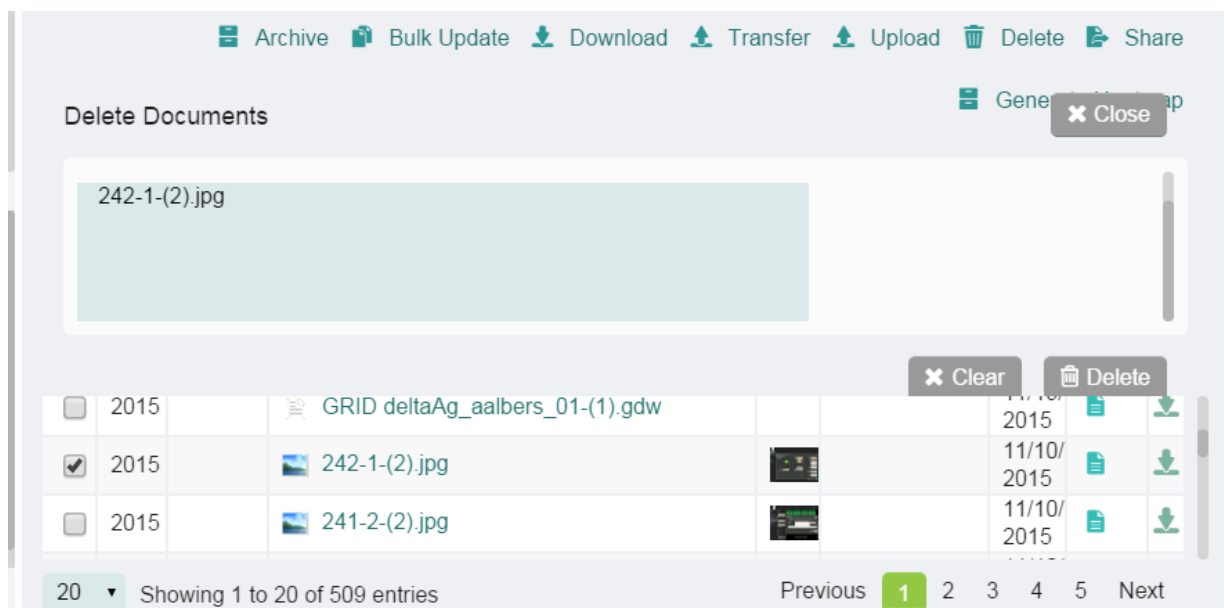
8.8 Share Documents

-The share function allows documents to be shared with other users in the organization or even people outside of the software entirely

-The share documents action can be accessed by first clicking on a document heading to which subgroup the documents should be retrieved from

-Click on the share icon on the action bar beneath the color coded documents filter

-Select files to share by clicking on the check box on the far left of the document list

    -They will then show up under the 'Document(s) to Share' box

-Choose from the available user's box which users the documents will be shared with

-To select a user, click on the name of the user, then click the right arrow icon [>] to move the user to the 'Send Document(s) To' box

-The 'Send Document(s) To:' box will show the list of all the users the selected documents will be shared with

-To remove a user from the list, click on the left arrow button [<]

- An email of someone who is not listed in the software can be added in the 'Add an Email Address' box so that the documents can be shared with them also

-After the email is entered, click the right arrow [>] button next to that text box to add it to the 'Send Document To:' box

-Once all the documents that are to be shared are selected and with the correct people, click the 'Send' button

-Or click the clear button to reset all the selected file documents or click the 'close' button to exit out of the Share action entirely
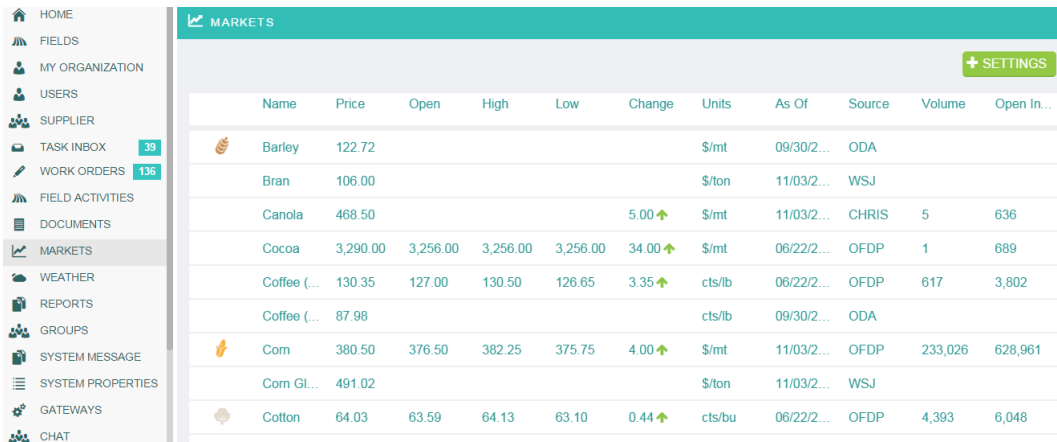
Chapter 9-Markets

The Markets feature allows a person to keep track of current market prices of various commodities. This Markets feature can be accessed from the Markets tab located in the navigation bar. One thing to note is that the settings of the market page and the market widget act independently from each other. The markets page can display different information than what the market widget displays, or they can both be set to display the same thing.

-To change the commodities displayed, click on the green settings button

-The 'check all' option will select all the commodities in the list and place a check mark next to them indicating that they have been selected to be displayed
-Similarly the 'uncheck all' option would clear all the commodities listed
-Individual Commodities may also be selected by clicking on them
-If the wrong commodity is selected, just click on it again to remove it from the selection
-Once all have been selected, click Update to save changes or cancel to undo any changes made
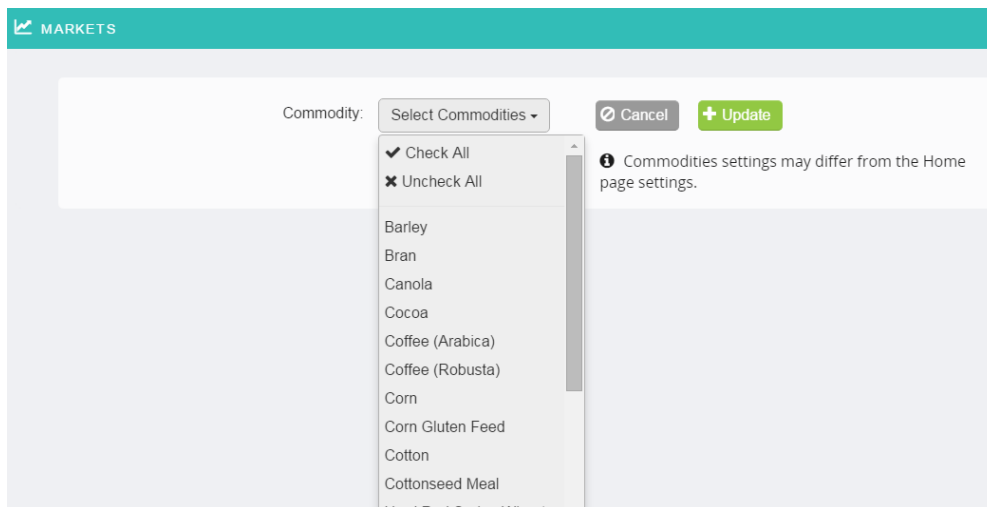
Chapter 10-Weather
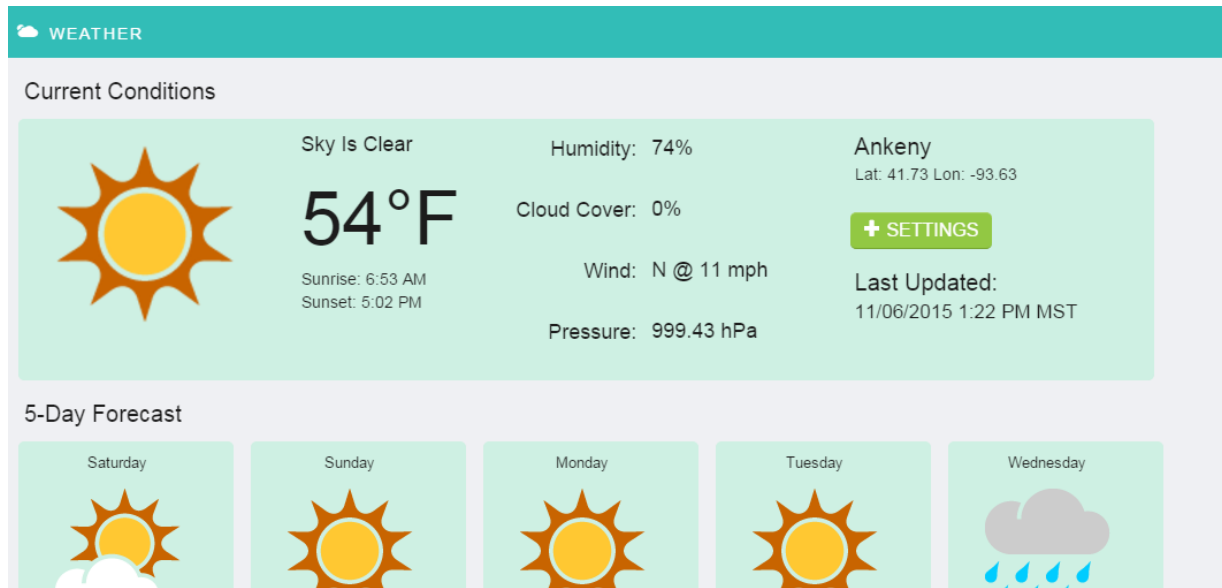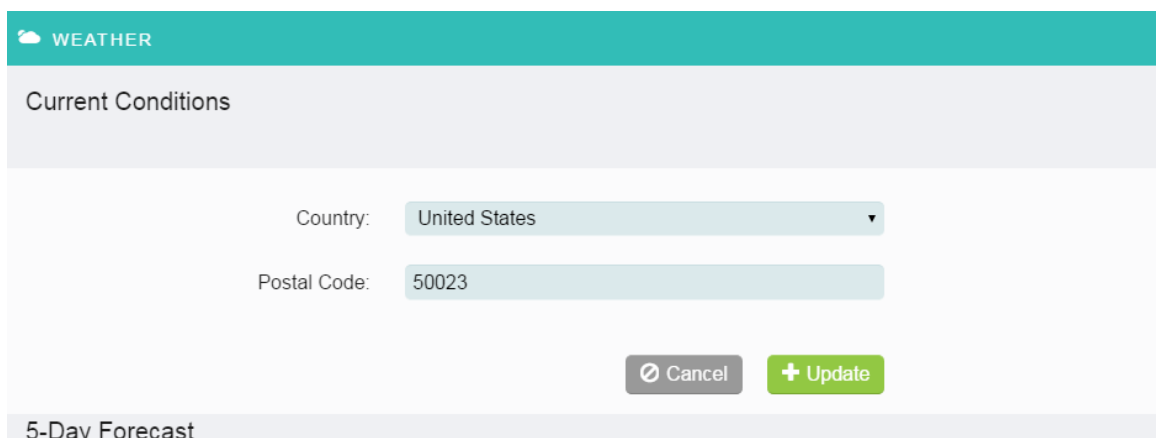
The Weather page allows you to view a weather report for the day. It also allows a five-day forecast for that area as well.
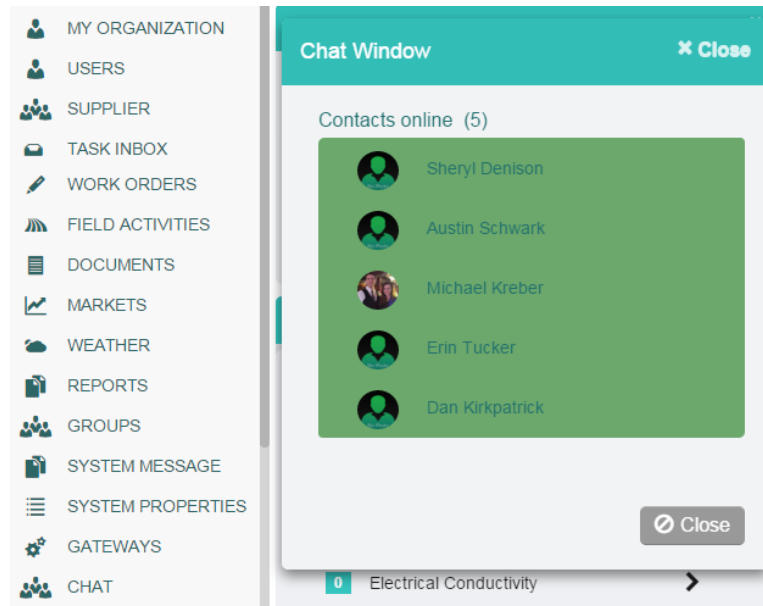

-To change the location, click on the green settings button
-Once entered, click the green update button

Chapter 11-Chat Window

The Chat feature allows users within an organization to chat with all other users under that organization hierarchy while in the portal.

-To chat with a specific person, click on that person
-A chat screen will appear
-Type the message in the bottom where it says 'enter your message here' and then hit return
-The 'Close button' will allow the message box to close, but the previous message will be saved and will continue where the conversation left off when the chat button is re-clicked
-The 'End Chat' button will close the chat box and the conversation
- All conversations will not be saved.