c8

The co8 Mobile App

USER GUIDE

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Getting Started

Welcome to co8 - the ultimate collaboration platform for all your work needs.

co8 is available on mobile as well as on web. In this guide, we will take you through the features of the mobile app, to show you some of the key components and functions of co8.

The app is composed of 4 main modules: **WorkSpace**, **Bookings**, **News** & **Messages**.

The WorkSpace is the main productivity centre and consists of three main components: The **Wall**, the **Hub** & the **Ticket**.

Your co8 Network

co8 is a multifunctional collaboration platform for individuals, businesses and trading partners to come together, co-create exceptional work and shape beneficial business outcomes.

Your **Network** is this very system of work contacts; your colleagues, business partners, suppliers, clients, customers, and anybody else with whom you might connect and collaborate with on co8.
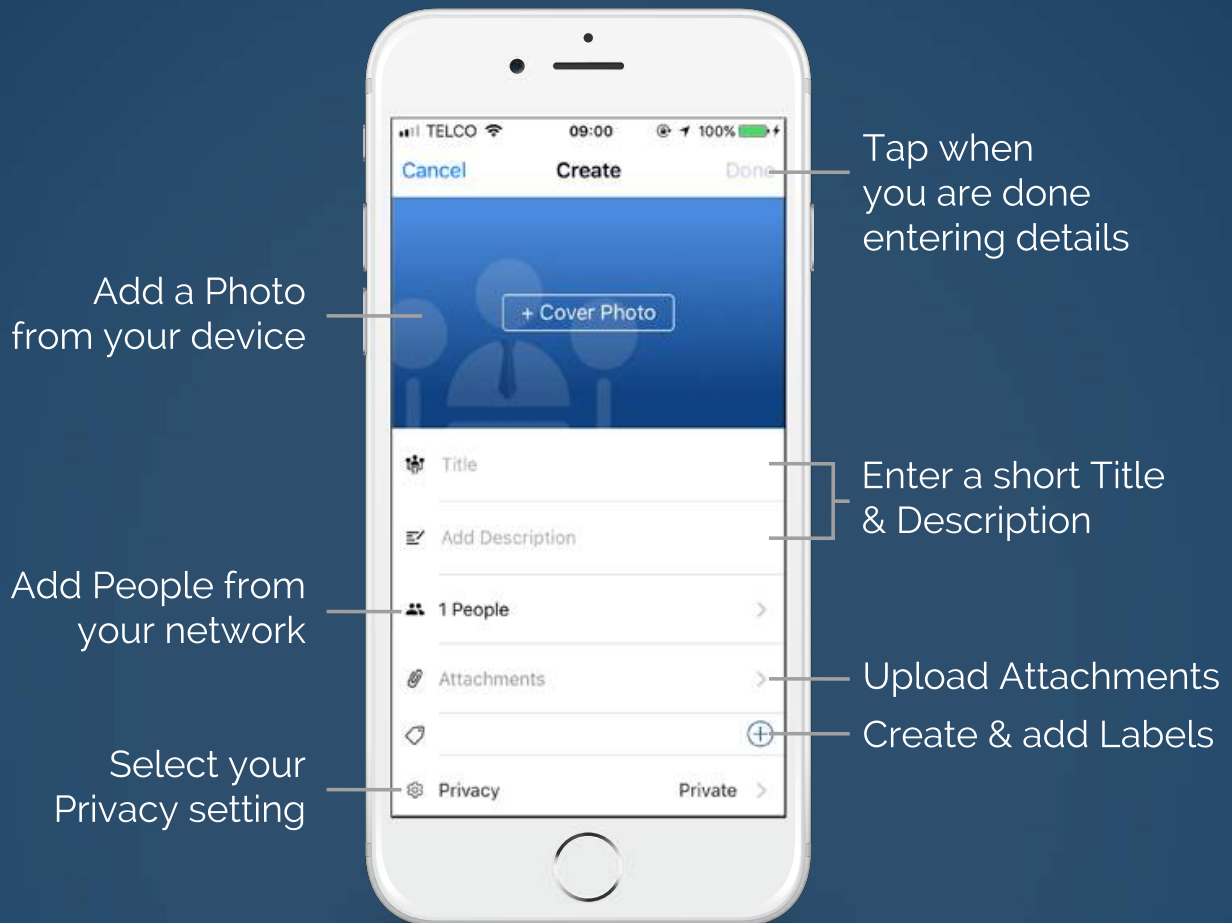
WorkSpace

View Ticket List

View Alerts ─── Create a WorkSpace

Tap anywhere on the WorkSpace listing to open it & view the Wall

Labels can be added & edited in each WorkSpace

Go to Hub

When you launch the co8 mobile app, the first thing you will see is a **Listing** of WorkSpaces; those that you are involved in, and also the public ones created by members of your organisation. This Listing is sorted by latest update (most recent to least). Tapping on a WorkSpace directs you to its Wall.

A WorkSpace can be used as a virtual productivity and connectivity centre for any job, project, team, department, or work purpose.

Creating a WorkSpace

Tap when
you are done
entering details

Add a Photo
from your device

Enter a short Title
& Description

Add People from
your network

Upload Attachments
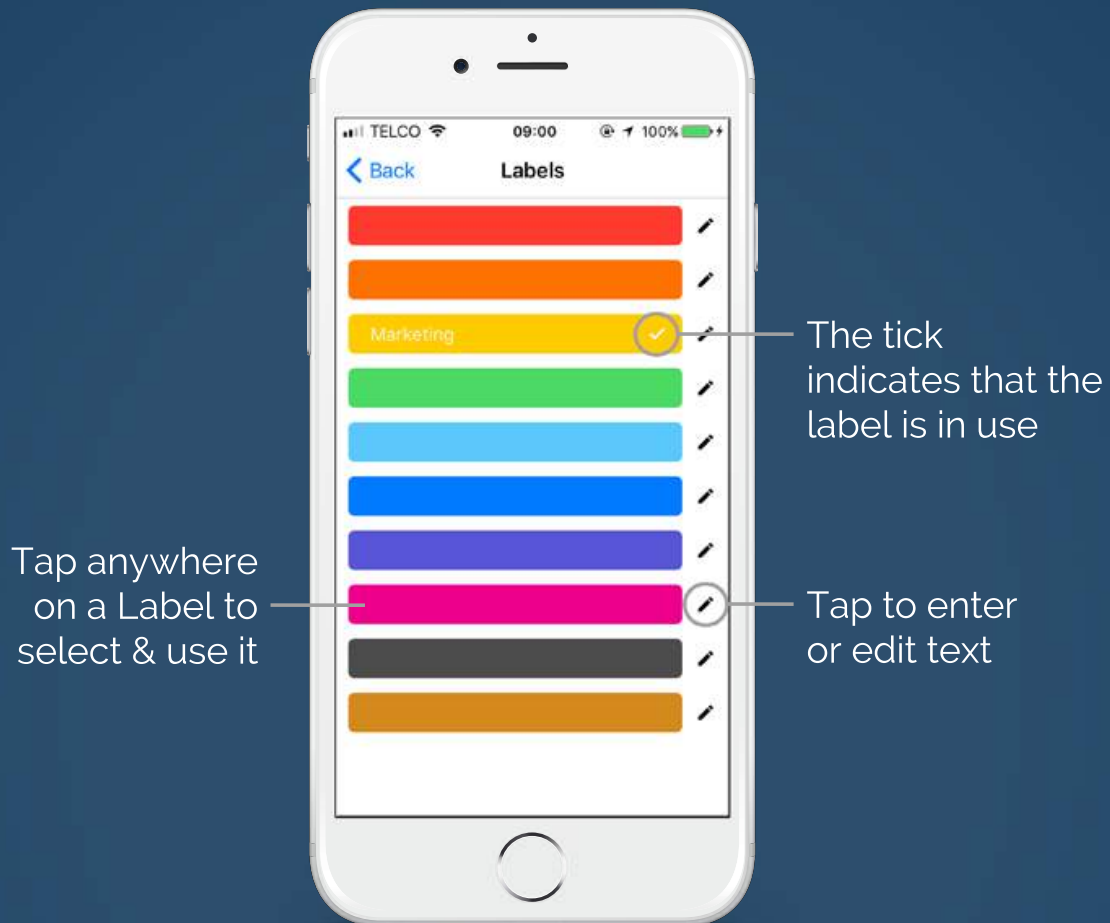Create & add Labels

Select your
Privacy setting

To create a new WorkSpace, simply enter a few details
to set up the WorkSpace Wall and give the WorkSpace
an identity and purpose.

A WorkSpace can be Public (visible to all members of
your organisation) or Private (visible only to added
Members of the WorkSpace).

When you have entered sufficient information, the
'Done' button will change colour & become tappable.

Creating & Using Labels

The tick indicates that the label is in use

Tap anywhere on a Label to select & use it
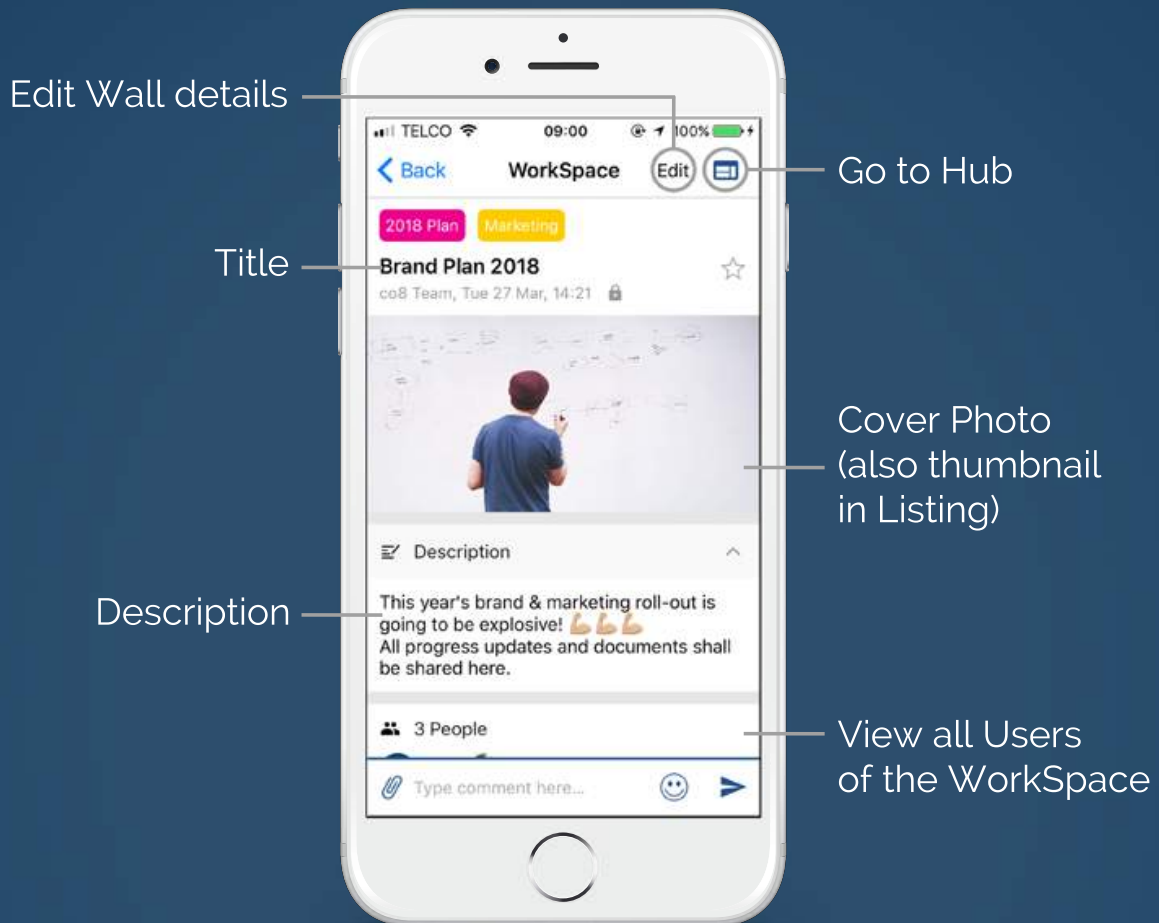
Tap to enter or edit text

You can add Labels to your WorkSpace to categorise and better describe the WorkSpace. Labels will also help you find WorkSpaces more easily using the Filter Search function.

Labels can be customised using a variety of colours, as well as by entering custom text. Select a colour & tap once to use the Label in your WorkSpace. Tap on it again if you wish to remove it from the WorkSpace. To add or edit text on a Label, simply tap on the pencil icon & type in your text.

Wall

Edit Wall details

Go to Hub

Title

Cover Photo
(also thumbnail
in Listing)

Description

View all Users
of the WorkSpace

The Wall provides a clear overview of the WorkSpace,
as it displays important information such as the Title,
Description, Users, Privacy status, and a list of all
the Attachments added to the WorkSpace.
It is also a space for discussion via Comments.

Tapping on the 'board' icon on the upper-right hand
corner takes you to the Hub, where you can plan,
structure and organise work units using visualised
work items that we call Tickets.

Hub

Filter

Category

Check/uncheck
Ticket as Complete

Tickets (Tap to open)
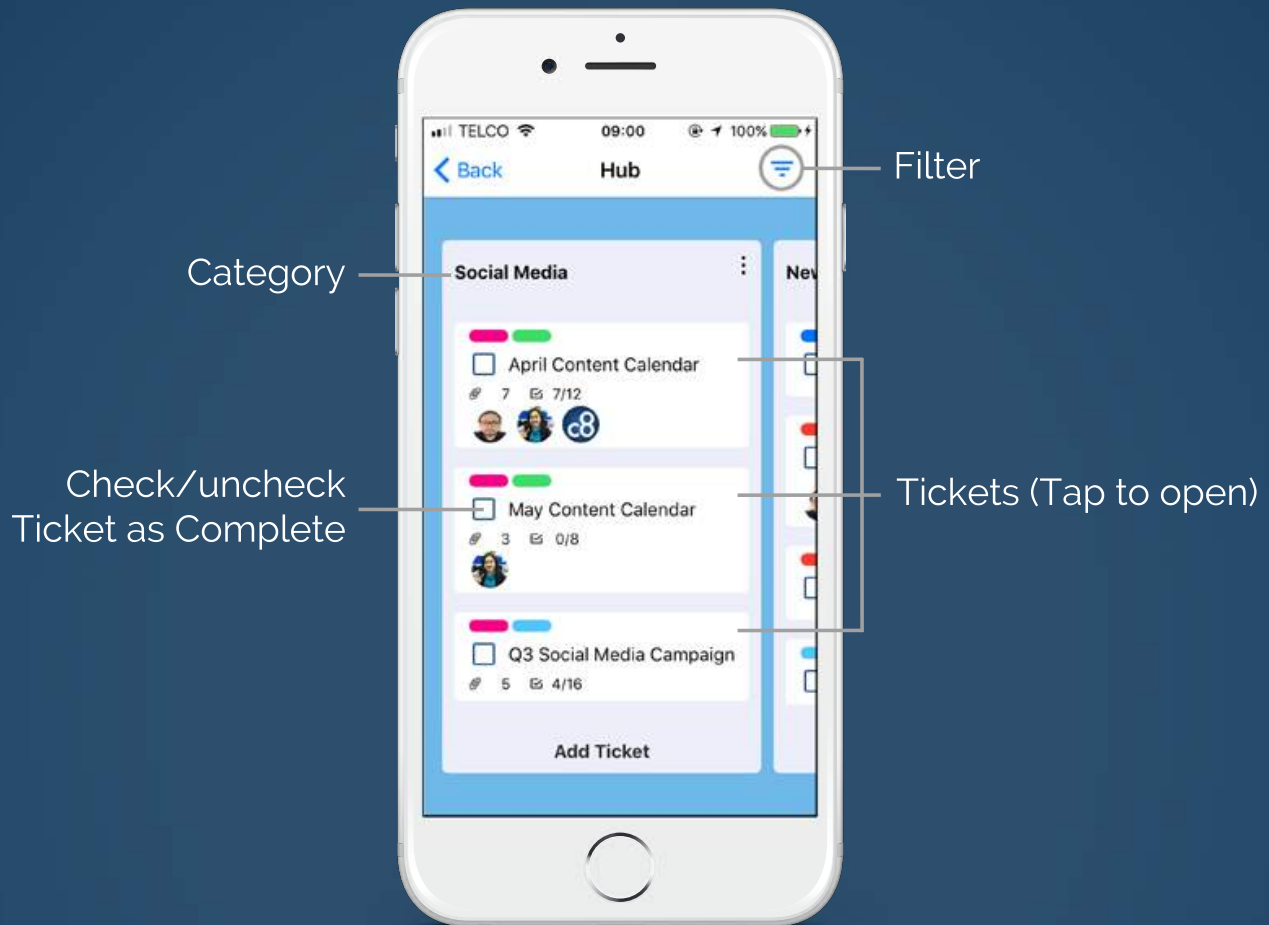
The Hub is the central part of a WorkSpace and
the domain of your project management activity.

It is made up of 2 main elements:
1. **Categories**, in the form of Kanban-style boards
2. **Tickets**, which open up to a host of information

This highly-organised structure helps you manage
projects, processes and teams in a simple and
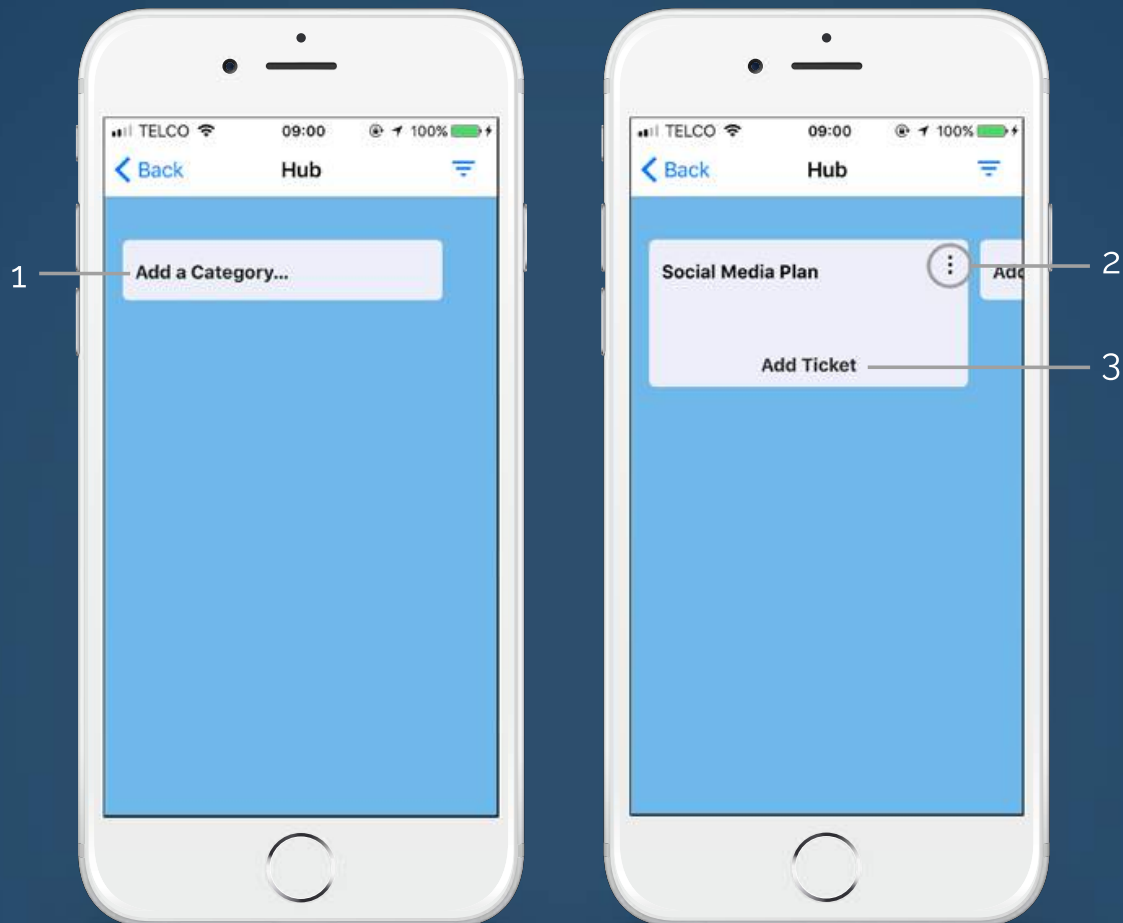flexible manner.

Accessing the Hub
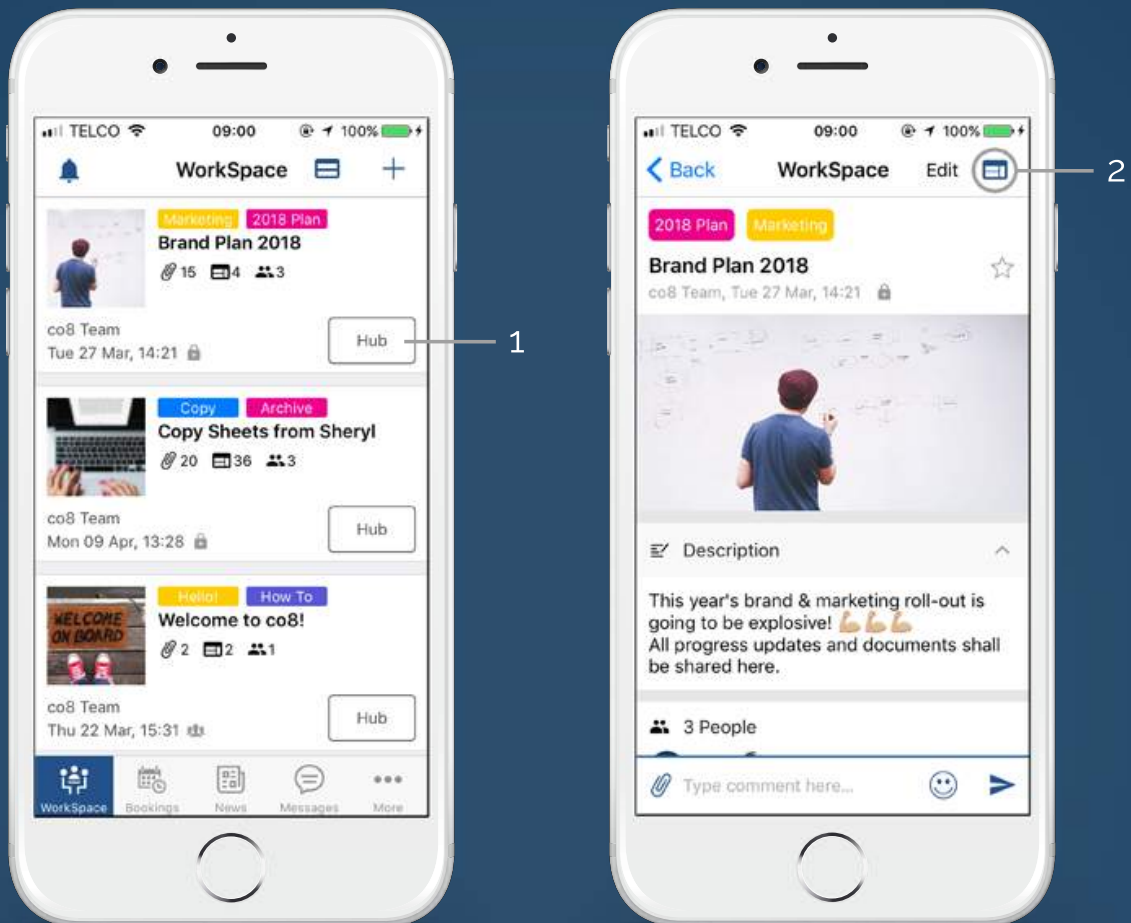
There are two points of access to the Hub
of any WorkSpace:

1. The WorkSpace Listing/Home page

2. The Wall of any particular WorkSpace

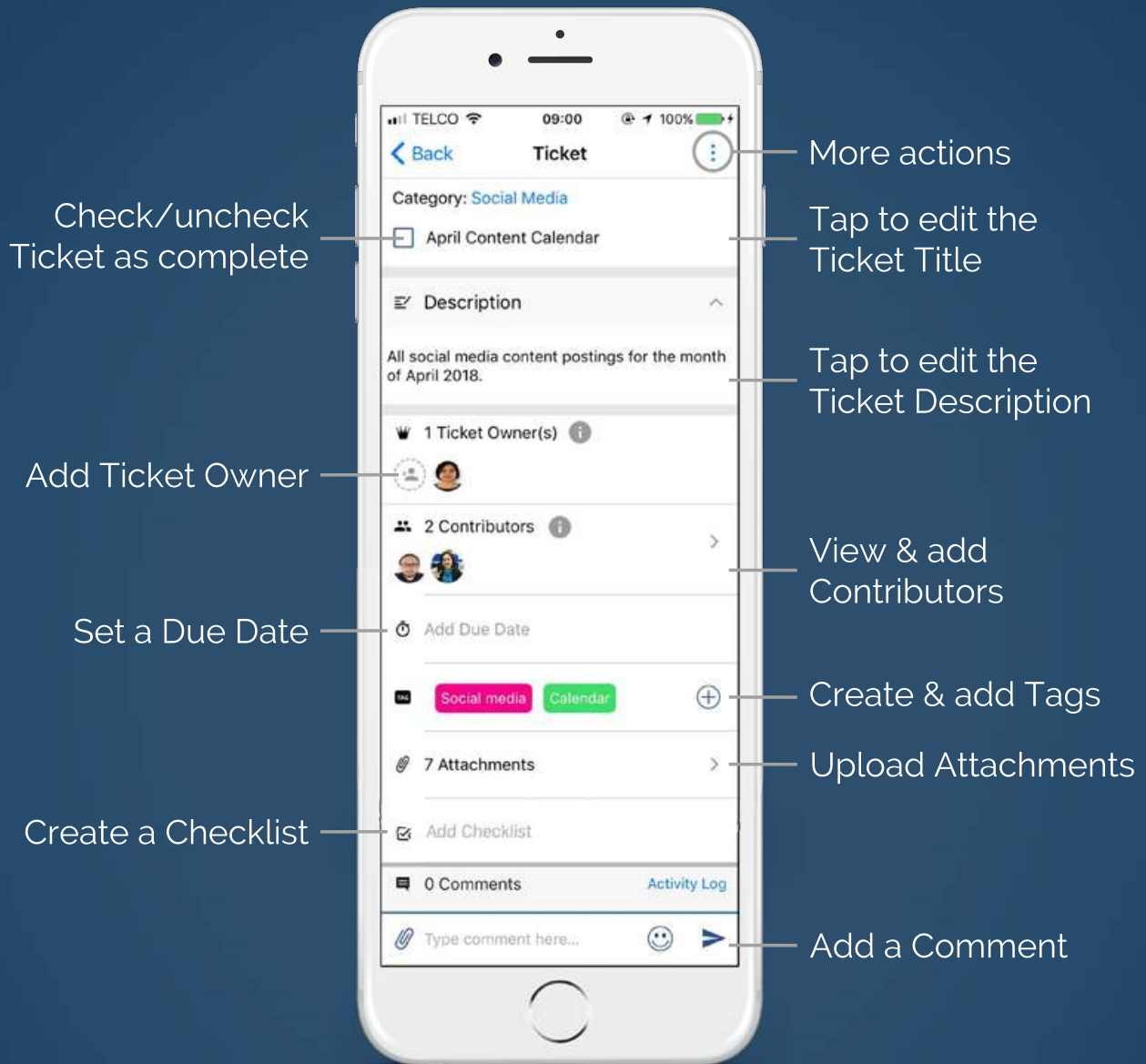# Creating Categories & Tickets

(1) To create a new Category, simply tap on 'Add a Category' and enter a name/title.

(2) To edit a Category name, tap on the 'kebab' icon and select 'Edit Category Name'.

(3) Once a Category is created, the 'Add Ticket' function will appear at the bottom. Tap on it & enter a name/title to create a Ticket.
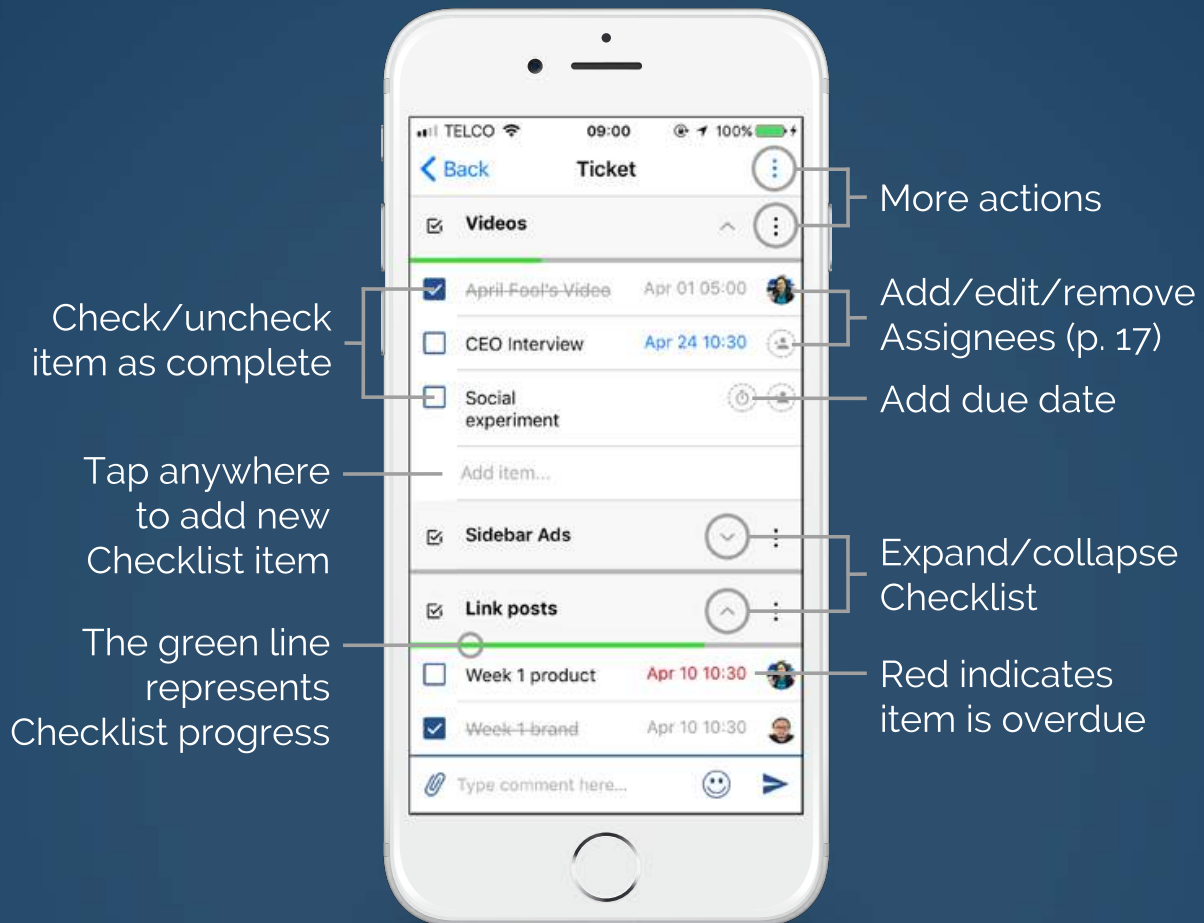
Ticket

Check/uncheck
Ticket as complete

Add Ticket Owner

Set a Due Date

Create a Checklist

More actions

Tap to edit the
Ticket Title

Tap to edit the
Ticket Description

View & add
Contributors

Create & add Tags

Upload Attachments

Add a Comment

Tapping on a Ticket opens up an execution environment,
which can be as detailed as you want it to be. You can add
Ticket Owners (p. 17) and **Contributors** (p. 16), create
Checklists, set Due Dates, add Attachments, and more.

Note: Attachments added to a Ticket will automatically be part of the
WorkSpace's collective list of Attachments, accessible from the Wall.

Checklists

More actions

Add/edit/remove
Assignees (p. 17)

Add due date

Check/uncheck
item as complete

Tap anywhere
to add new
Checklist item

Expand/collapse
Checklist

The green line
represents
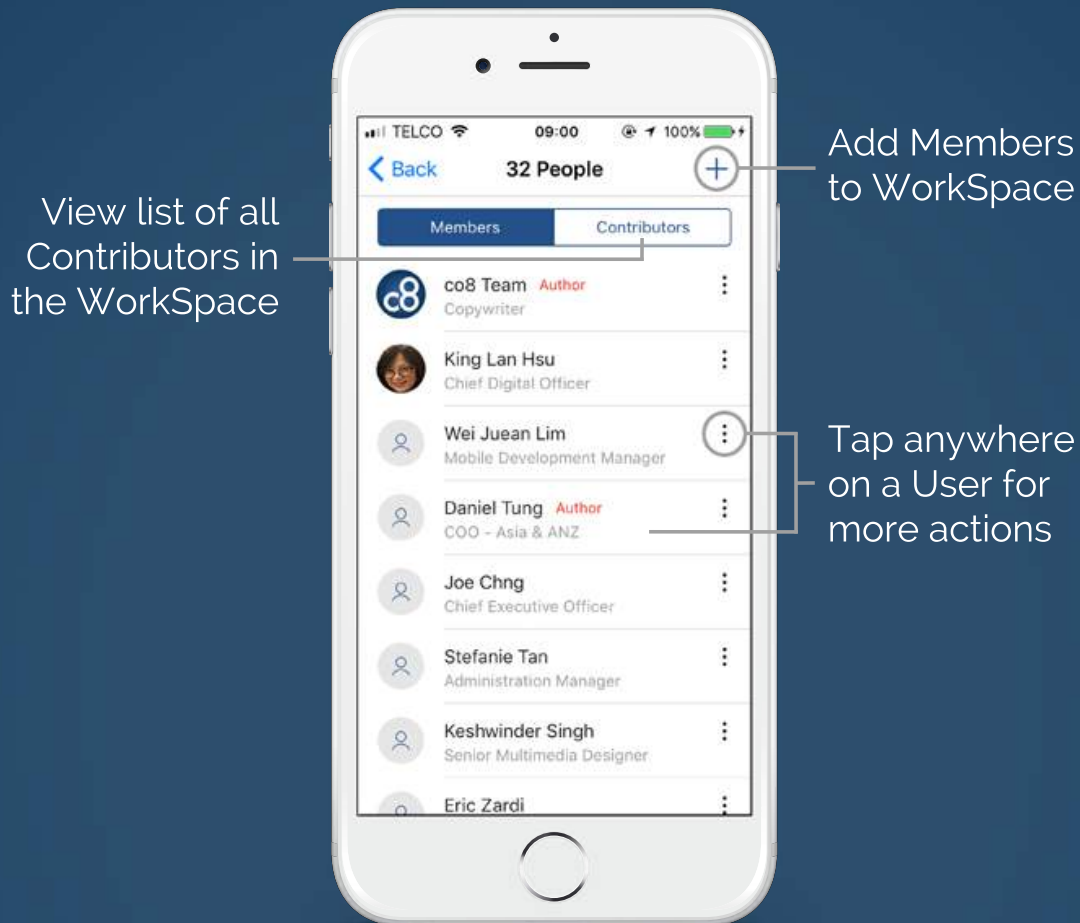Checklist progress

Red indicates
item is overdue

You can use Checklists in a Ticket to further break down a task into more granular action items. Each item can be attributed a due date, and assigned an individual User.

Easily track the progress of a Checklist by checking off items to mark their completion. A green line underneath the Checklist title will increase or decrease in length to visually reflect this progress.

If an item is overdue, the due date will be shown in red.

Users & Permissions

View list of all Contributors in the WorkSpace

Add Members to WorkSpace

Tap anywhere on a User for more actions

There are 3 kinds of WorkSpace Users: **Members**, **Authors** & **Contributors**, each with a different set of permissions.

When you create a WorkSpace, you automatically become an Author of the WorkSpace. As an Author, you can add or invite other Users to join the WorkSpace as Members or Contributors.

You can add Members and appoint Authors from the Wall, but Contributors can only be added from within the Ticket to which you wish to add them.

Members & Authors
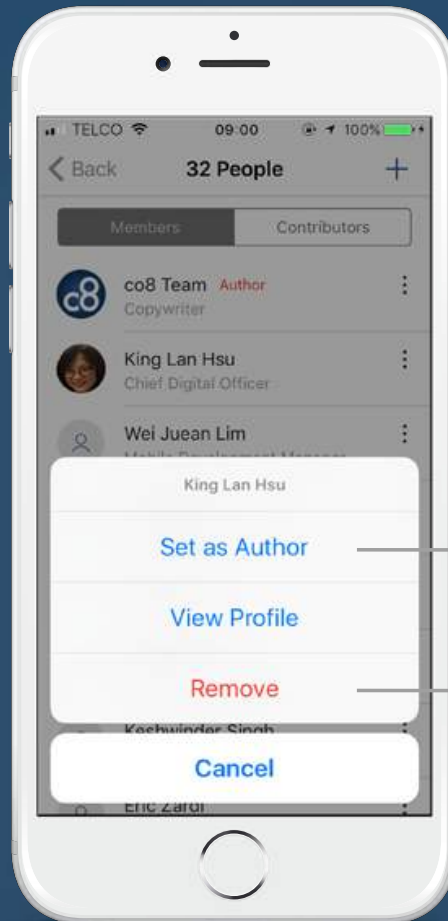
These actions
are available
only to Authors

Members can view all items on the Wall, Hub and all Tickets. All Members can edit most items, but not all can add, remove or manage Users, delete the WorkSpace, or edit its title.

Authors are members with additional roles. The User who creates a WorkSpace is automatically set as an Author. They will then have full access to the WorkSpace, including the features that are not available to Members as mentioned above.

Authors can also change the role of a Member to Author.

Contributors
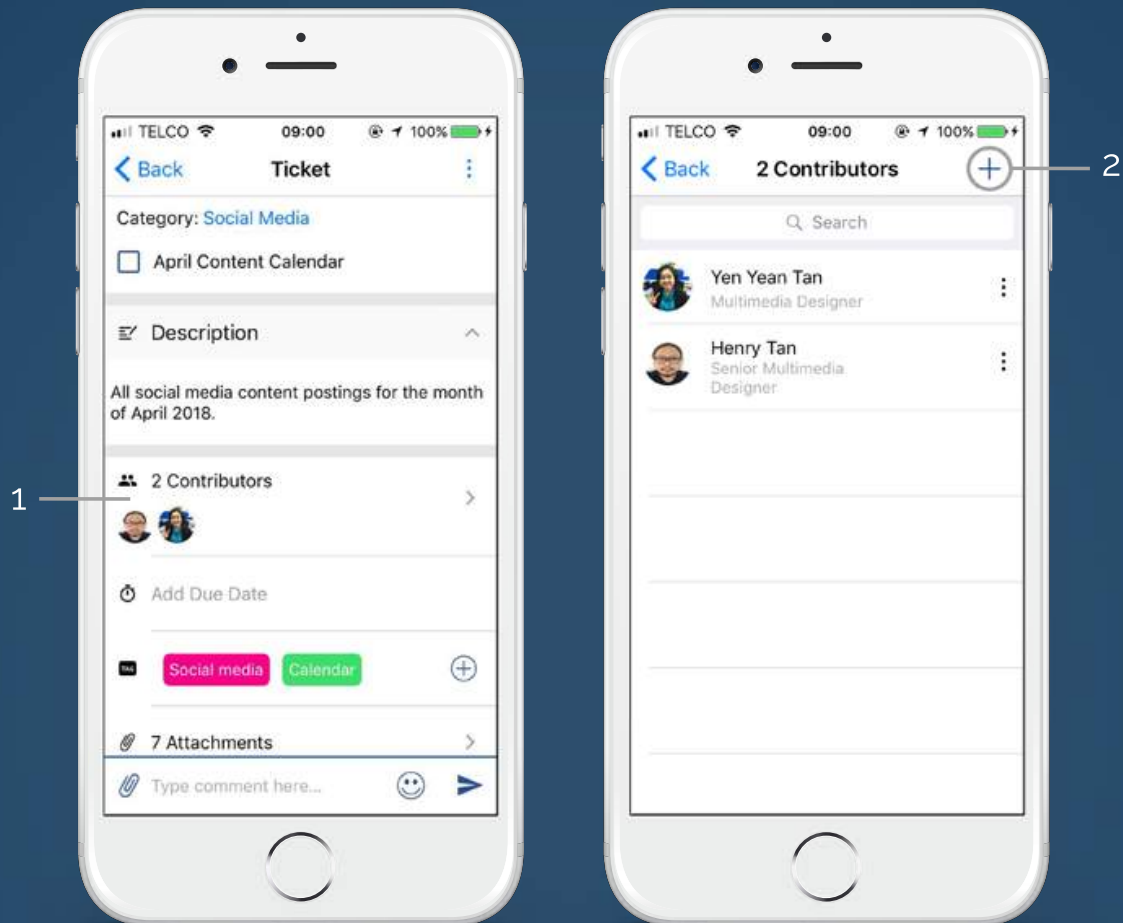
The access of **Contributors** is limited mainly to individual Tickets, in which they can edit any item except for Tags. They can also access the WorkSpace Wall and view the cover photo, title & description, but cannot edit them.

To add a Contributor to a Ticket, tap on (1) to open the Contributors list, then tap on (2) to select contacts from your Network. You cannot add a Contributor to a WorkSpace without first adding them to a Ticket.
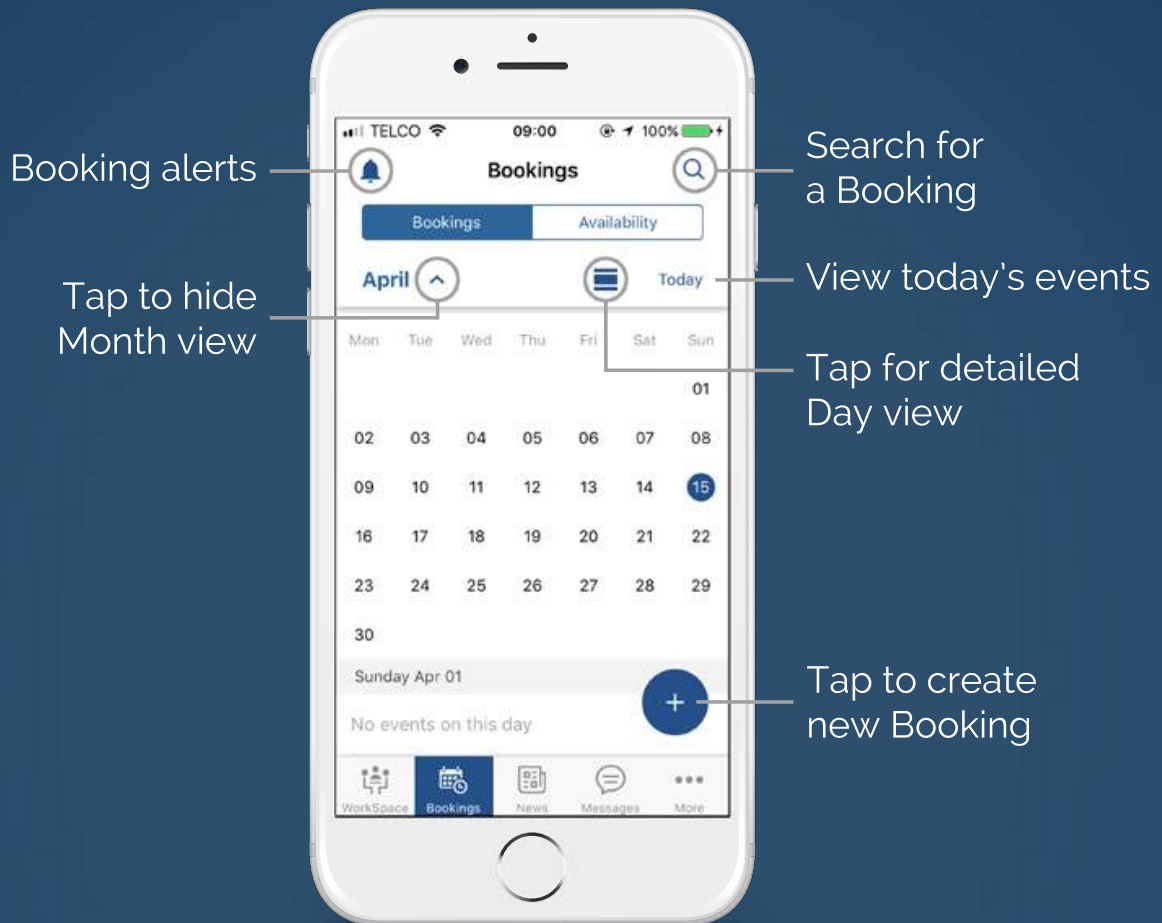
Ticket Roles

Any Member, Author or Contributor can be assigned roles in a Ticket to discern their responsibilities across the Hub.

An **Assignee** is a User assigned to a Checklist item (p. 13) as the person in charge of completing the task.
A **Ticket Owner** is a User assigned to a Ticket (p. 12) as a manager, supervisor, or main executor of the Ticket.

Note: Whilst you can only add 1 Assignee to a Checklist item, you can add multiple Ticket Owners to a Ticket.
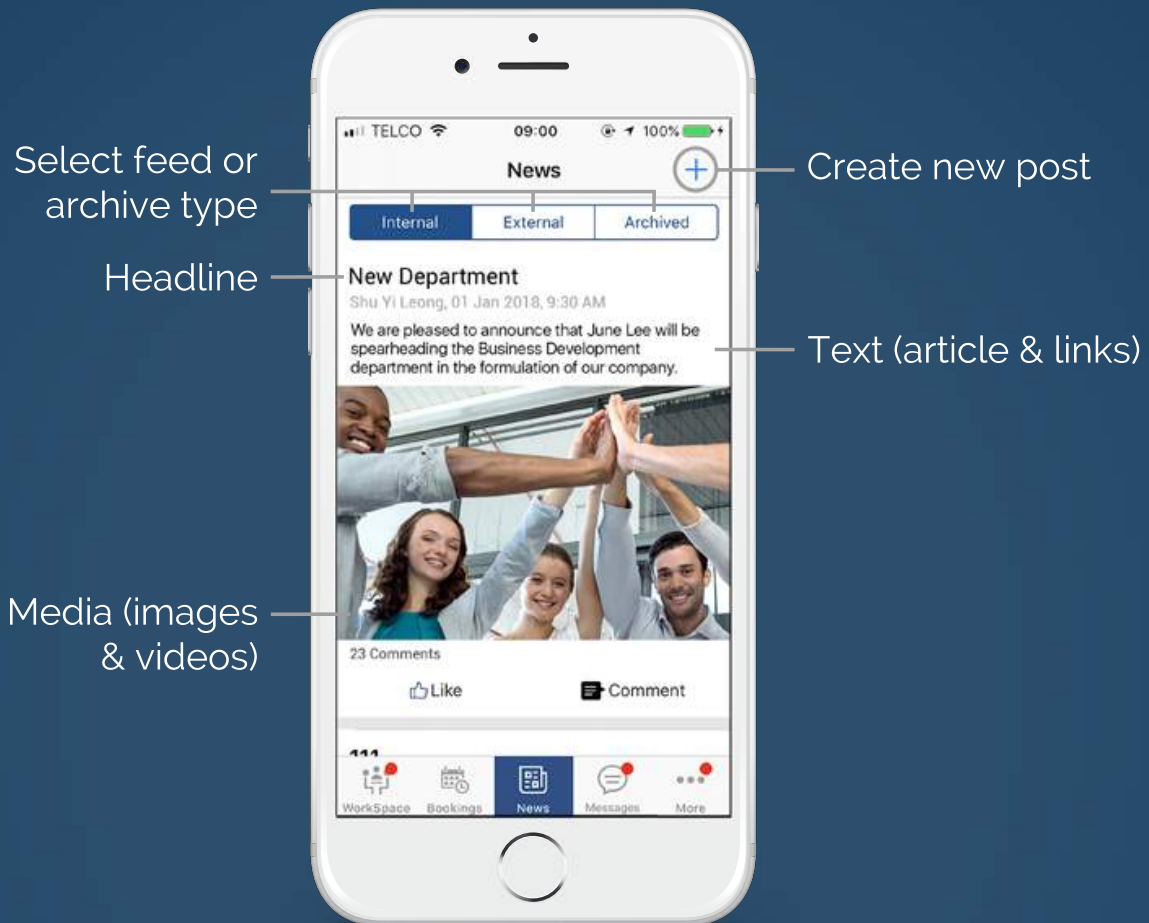
Bookings

Booking alerts

Tap to hide
Month view

Search for
a Booking

View today's events

Tap for detailed
Day view

Tap to create
new Booking

Bookings is a module that enables the sharing and
trading of resources. Users can list services and
resources to all or selected contacts within their
Network, who will then be able to book them
directly through the app.

A Booking takes the form of an event, in that it
occupies a space in your calendar.

News

Select feed or archive type

Headline

Media (images & videos)

Create new post

Text (article & links)

In the News module, you can both view and share News postings with the people in your Network.

Internal/External refers to the viewability of a post (For more info, see "Internal & External News" - p. 16). The **Archived** feed contains News posts that have passed their Publish End date/time.

To create a new News post, tap on the '+' sign at the top right-hand corner of the screen.

Internal & External News
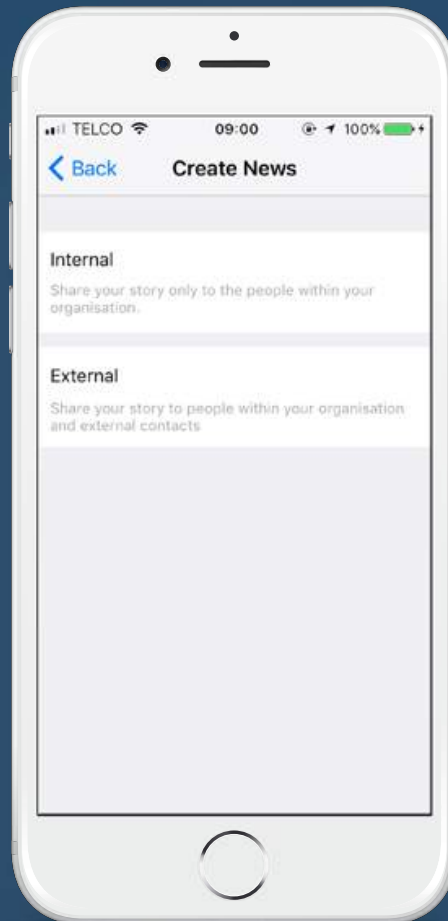
To create a new News post, you must first determine your Audience type by selecting Internal or External.

Internal News is shared only within your organisation.

External News can be shared to & viewed by individuals and groups that you select from the list of contacts within your co8 Network. When you select a group/organisation, all Users within that organisation will be able to view your post.

Creating & Posting News

Enter a Headline

Publish your post
to your audience's
feed

Enter text

Add Media from
your device

Select a start & end
time & date

Select the Users
to whom you wish
to share the post

Enter a Headline, then type your text and/or upload an
attachment (image or video) from your device. You can
also choose to set an automated date & time at which
your post will be published. After the End date/time,
the post will automatically move to the **Archived** feed.

When you have entered sufficient information, the
'Publish' button will change colour & become tappable.

Messages

Start new
conversation

Contact's picture

Tap to open
conversation
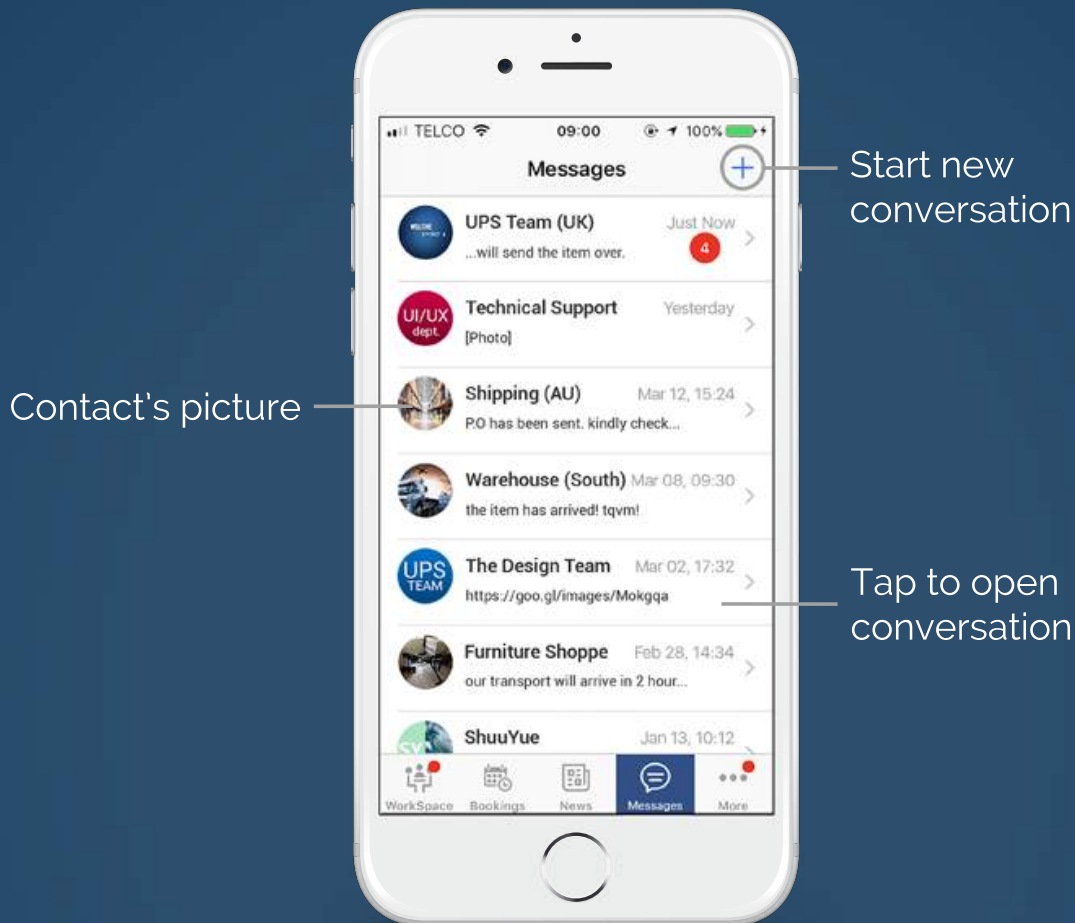
Send & receive individual and group messages to anyone in
your Network. To start a new conversation, simply tap on the
'+' sign at the top right-hand corner of the screen.

You can send text messages as well as images and videos
uploaded from your device, or emojis and stickers available
on the app.

More
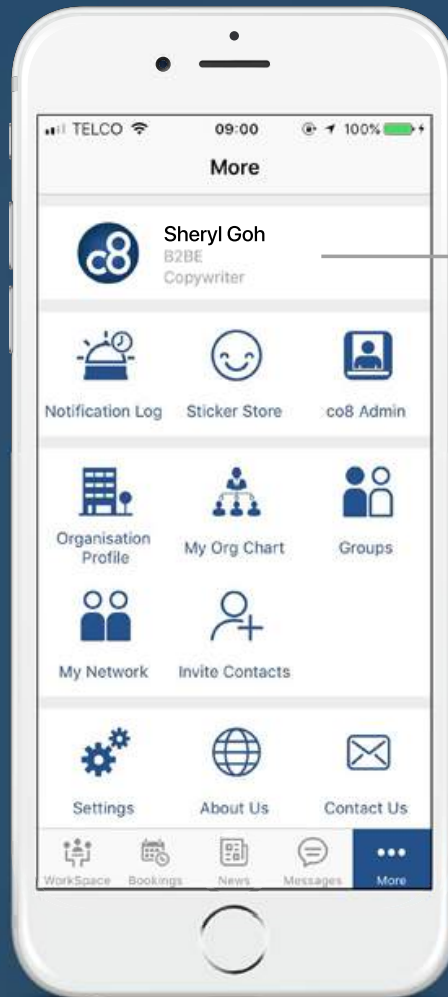
Tap to edit
your profile
details

Network info
& actions

Aside from the 4 main modules, more features
can be found in the **More** tab. Here you can access
information and actions involving your co8 Network,
including your contact list, your organisation's profile,
and an organisation chart that shows the structure
of your company's personnel.

You can also add new contacts to your Network
and access general features like Settings.

My Org Chart

View your position

Supervisor/manager of currently viewed position (Tap to view the organisation level above)

Go to last view

Tap to view subordinates (if any)

Currently viewed position

co8's Organisation Chart feature enables you to view the hierarchical structure of your organisation's personnel and retrieve your colleague's profiles at any time, no matter where you are. You can leverage this database to form and reform relevant working groups in co8.

Tap on any person to view the organisation level directly above them (which includes their supervisor/manager), and also all their subordinates (if any).

Groups
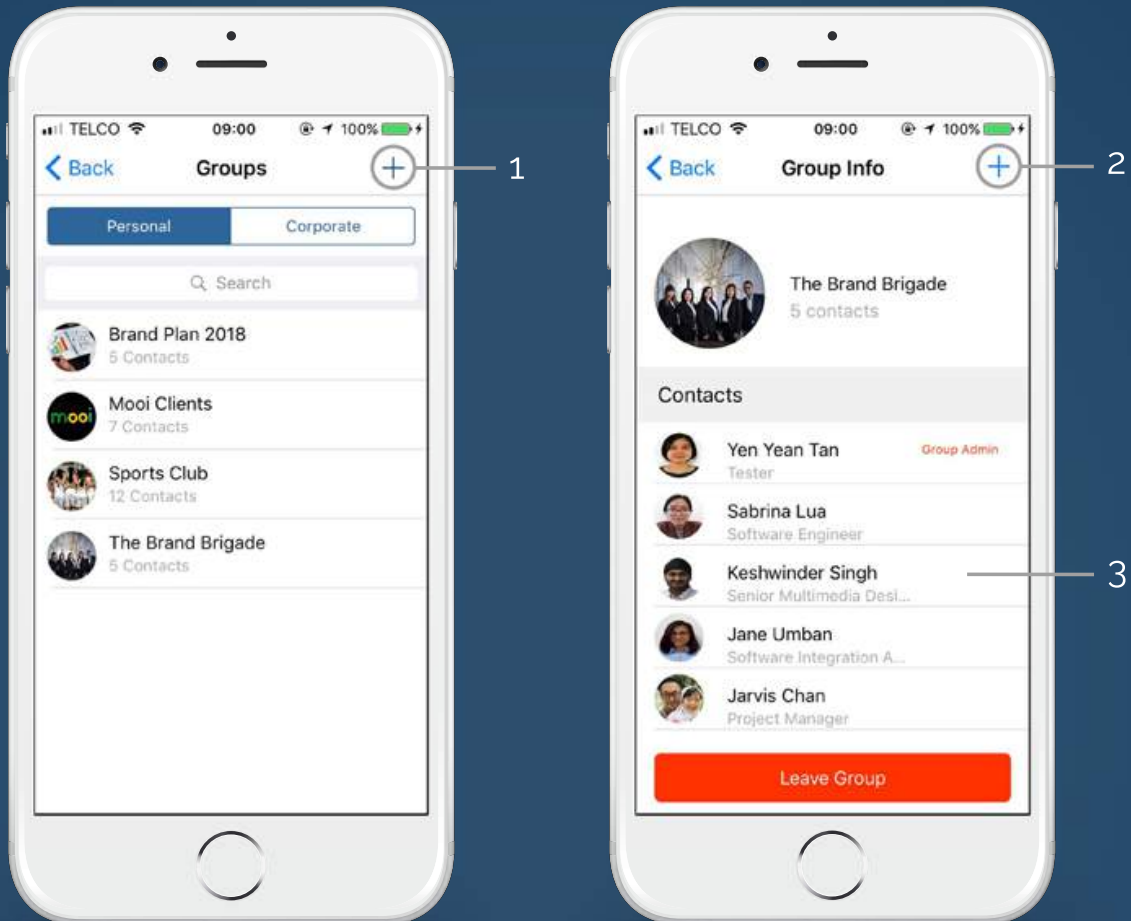
You can create groups in co8 to make certain actions like sending messages and posting news faster and easier.

Personal groups are private and can be created by anyone, whereas **Corporate** groups are visible to all staff, but can only be created by SuperAdmins (p. 13), but are visible to all staff.

(1) Create a new group.
(2) Add a member to the group.
(3) Tap on a member to message, remove, or view profile.

co8 Admin
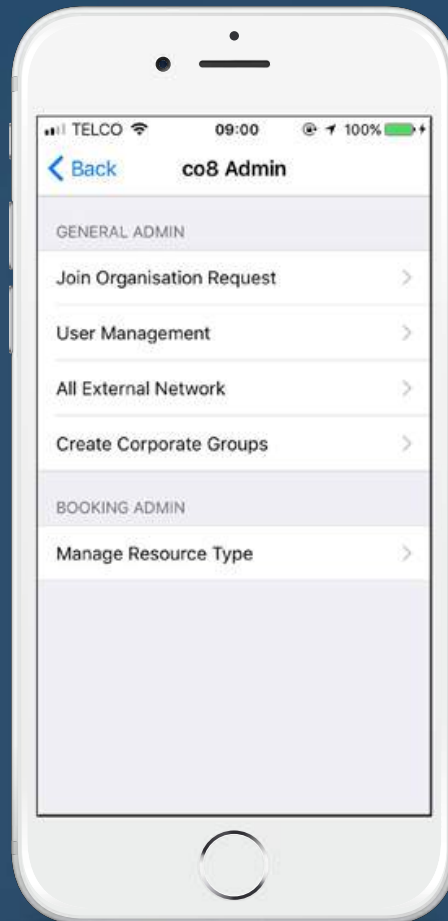
In any co8 organisation, certain users are designated administration roles. There are 2 default admin roles: Admin and Superadmin. A user who has not been designated an admin role is by default a Standard User. Note: This 'co8 Admin' page is not visible or accessible to Standard Users.

Superadmins can also create new admin roles with custom permissions in Role Management (co8 web), where you can view and edit these roles and permissions.

Admin & Superadmin

Superadmin

Admin

Tap to
manage user
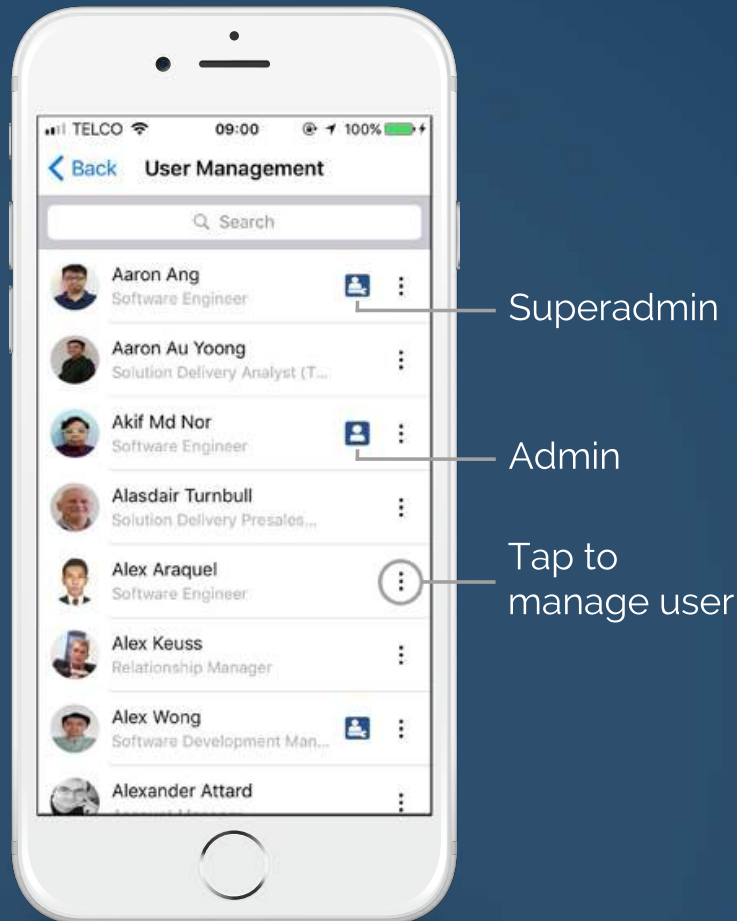
There are 2 default admin positions.

Superadmins have full management control of all co8 users
in their organisation. They can add, remove or change the
roles of users at any time.

Admins play a support role to Superadmins, and only have
access to some management functions. They can view the
organisation's external contacts, create corporate groups,
and create booking resources.