

Account Owner Help Guide

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- 1. Key concepts
 - 1.1. Overview
 - 1.2. Your Account & workshop
 - 1.3. Projects and Timelines
 - 1.4. Organising and finding information
 - 1.5. Accessing GlobalWorkshop
 - 1.6. Mobile app access
- 2. Creating Project Profiles
 - 2.1. Instructions
 - 2.2. Notifying an owner (the customer)
 - 2.3. Editing the Project
 - 2.4. Deleting a Project
 - 2.5. Changing the owner of a Project
 - 2.6. Protip: Your own vehicles vs your Customers
- 3. Project Timeline Updates
 - 3.1. Overview
 - 3.2. How does this work
 - 3.3. Instructions
 - 3.4. Comments
 - 3.5. Individual photo management features
 - 3.5.1. To move a photo to a different update
 - 3.5.2. Photo Sorting within a timeline update
 - 3.6. Video features
 - 3.6.1. Adding a video
 - 3.6.2. Accelerated video upload
 - 3.6.3. Additional video notes
 - 3.7. Draft updates
 - 3.8. Hints
- 4. Advanced Tags & Collections
 - 4.1. Set up tags
 - 4.2. Tagging an Update
 - 4.3. Creating a Timeline Collection
- 5. Additional Project Features
 - 5.1. Spec Sheet
 - 5.2. Gallery
 - 5.3. Competition History
 - 5.4. Logging
 - 5.5. Parts
- 6. Guest Passes
 - 6.1. What is it
 - 6.2. Creating a Pass
 - 6.3. Receiving a Guest Pass
 - 6.4. FAQ's
- 7. Privacy Settings in more detail
 - 7.1. How it works
 - 7.2. When you change a vehicles privacy
 - 7.3. Guest Passes
 - 7.4. A note on Security
- 8. Reports
 - 8.1. Instructions
 - 8.2. ProTip: Custom Report layouts
 - 8.3. ProTip: Hard cover books
- 9. Administrator Users
 - 9.1. Instructions
 - 9.2. Restricting staff publishing rights
- 10. Site Design Features
- 11. Account Settings

1. Key concepts

This section is a must read - to help you understand the overall concepts of GlobalWorkshop. Further sections of this Help Guide show you exactly how to use these features and other features.

1.1. Overview

GlobalWorkshops mission is to make it easy to capture all visual information around a Vehicle (land, sea or air!) enabling you share it with customers as progress happens *and* automatically build up a beautiful searchable history of that vehicle.

1.2. Your Account & workshop

Each GlobalWorkshop account is secure, private and associated with a specific business - you can't see someone else's workshop account and vice versa. Your *Workshop*, is your collection of projects that may be for your customers, for yourself or a mixture of both.

1.3. Projects and Timelines

Projects and their respective timelines are central to how GlobalWorkshop functions. Depending on the industry your account is setup for these are known as Cars, Boats, Aircraft etc. Once a project is created you can add **Timeline Updates** to it. These are groups of photos, videos and notes of things that happen over time. You can selectively choose when and if these timeline updates are shared with your customer.

A project, showing a timeline with 2 timeline updates:



And an individual timeline entry:



- A project is a single car, boat, plane in your workshop
- Each project is associated with an Owner. This is normally your customer
- Each Project has a list of Timeline Updates. These are things that happen over time
- Every project, and timeline update has **privacy settings** so you can choose whether something is completely public, restricted you and the owner, or just for your workshop
- There are also additional features on a project to capture additional things such as parts, specifications and more.

1.4. Organising and finding information

With a comprehensive search system, along with optional tags and collections GlobalWorkshop makes it easy to look back on the history or a project, or search across all your projects

- There is a **tag** and **collection** feature to help categorise your timeline for a project, so you can easily see either stages of a build, or only things to do with an area of the project
- There is a search system that allows you to search across all text recorded on timeline updates

1.5. Accessing GlobalWorkshop

Your business will get it's own unique GlobalWorkshop URL (website). Depending on the user who logs in, or accesses via a Guest Pass, will govern what they have access to:



• You and your staff As an account holder you access GlobalWorkshop with your own email and password that you setup when you register. You can setup login's for your staff and select what things they can do within your GlobalWorkshop account.

🙆 Dashboard Help Example Site ×	+						- 0 ×
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GlobalWorkshop	🗮 🖷 Home Search						n.
ACTIVITY Dashboard Unpublished Updates (2) Recent Timeline Updates	Help Example Site	Admin		3 ⊟ Updates	7 ■ Images	1 Revehicles	1 ≜People
Wollect-on Ref Current Vehicles							
PEOPLE Guest Passes All Users	Recent Updates Customer/Project	Update	Date	Open time	View count	Insider Ne latest	ws The
Administrators	Fraser SP330 / Rowan Hick	Installed new cams	31-10-2021	less than a minute	4.	27 Oct A quick one for to corrected an issue profile photo for p	where the main
 Help Center STUP ½ Logging Templates ½ Account Details ✓ Site Design 	All Vehicles					showing the old v updated the imag would cache it) an issue with users w "Workshop only" (25 Oct A new feature and today (1) From cli added a new "Wo feature. Previous have only been at	resion when you e (your browser d correcting an ho are locked to privacy settings, improvements ent feedback we've kichop Guest Pass" your customers le to send guest at to on a project.

• Your customers When you setup a Project, you provide the name and email address of the owner of that project so that they can setup a password and get access to their own project(s). They will only get access to their project and only when you Notify them to do so

Home The Training Ground ×			- n x
< → C 0	B https://training.globalworkshop.com/home	## \$P	☺ 坐 👪 ≡
GlobalWorkshop	≡ A Home		<u>Ω-</u> *
Mr Wolkishop Vehicle Timeline	The Training Ground Client Portal 3	25 s	50 Images
HEUF	Recent Updates	1	
	Roware published an update on 2020 Supercharged Fraser 57550 Catch can inspection		▲ Restricted w Full Update

With the primary purpose to give clients a professional, easy to navigate, history of their builds



• *Guest Passes* Both you and your customer can create guest passes. These are "View Only" links to a given project, the guest pass can only view the Project and the Timeline updates. They can also subscribe to follow along with progress.

Note: Because a person may have a project with more than one company or may want to setup their own GlobalWorkshop account for their own private collection, their login/password is the same across all GlobalWorkshop Accounts. You can disable access to your GlobalWorkshop site but you can't see/manage the person's password

1.6. Mobile app access

In late 2021 we began development of our mobile apps for iPhone and Android. These are primarily designed in their first versions to enable you to very quickly capture, and see timeline updates direct from your phone.

While you can access GlobalWorkshop from a mobile browser, the apps allow for more advanced features like offline saving of updates which is not possible by browser.

App development is more intensive than web development as such we are starting with a core feature set to compliment the primary experience in browser

You can read about the mobile apps in the companion help guide to be released mid November 2021.



2. Creating Project Profiles

We will take you through creating a vehicle profile attached to a new customer. After a project is created then you start adding Timeline Updates (for past or present). When you're happy with the profile you can then Notify the owner, to register on your site, and see their project.

2.1. Instructions

• Go into **Current Vehicles** this may also be known as **Current Vessels**, or **Current Aircraft** depending on your industry. This is known as your **workshop** where projects are stored.

😫 Training Site 3 🛛 🗙 🗙						- 🗆 🗙
← → ♂ 0	A https://helpexample.globalworkshop.com	n/projects/in_workshop			# ☆	⊚ # ≡
GlobalWorkshop	≡ 🦷 Home Search					n .
ACTIVITY	Workshop Manage your ve	hicles		+ Create new vehicle profile	Alestore from archa	ve 3 Archives
E Recent Timeline Updates	Add To Workshop			T I		_
wonenser				e this for any vehicle that doesn't exist lick Restore from Achives to add that pro		
💼 Image Library						
	In your workshop Vehicles you can) update				
Guest Passes All Users	Code/Name	Owner	Drafts	Last update	Ac	tions
1 Administrators	You don't have any projects in your v	vorkshop yet. Click "Create Ner	w Profile" above to get sta	arted.		
Help Center						
光 Logging Templates						
法 Account Details						
<i> </i>						

- Click on Create New Profile
- Fill out the First Name / Last Name / Email address of the customer (they won't be emailed until you Notify them) Click Next
 Step

Step 1 Pick or Cre	ate Custome	r				×
Pick from the customers on yo	ur site below, or setup	a new customer				
O Existing User on site						
Create new User						
First Name Joe	Last Name	Bloggs	Email	joebloggs@dot.com		
Enter the details above. An profile	account will be created	for this customer, but th	ey won't	t be emailed details until y	ou presss "Notify" o	n their
					Cancel N	ext Step

• You'll be taken to the **New Profile** page. Here is where you setup the **general details** on the project. Fill out the required details and ensure you put a recognisable **name** for the project (you can always come back and edit this later). Make sure you select your best photo for this project - it's what everyone sees in your workshop, and apps.

Туре	Car
Name	
	Personalised name for this project
Year	2021
	Manufacturing Year
Make	
	Original manufacturer of vehicle
Model	
	Original model of vehicle
tional Details	
Profile Photo (recommended)	Choose File No file chosen
	Select your best photo for this vehicle. Pictures in landscape look best for profile photos
About this Vehicle	
	Put in a brief description about this vehicle. For a detailed specification use the entries below; along with the Specification Sheet once this profile is

• Setup the privacy for the project. You can choose either **Public** as the name implies will be publicly visible. **Restricted** and **Private** can be selectively chosen as you are able to give out guest passes, but lock off functionality from guest pass viewing.

	Public	Restricted	Private	
	Available to anyone, search engines etc. Visible on the public areas of this site.	Only people logged in to this can see this vehicles profile. Any guest passes will be able to see this.	Only you and the workshop that manages this site. Also visible to Guest Passes with private flag set.	
Main Profile and Timeline **	0	۰	0	
Gallery		۲	0	
Competition History			0	
Specification Sheet		۲	0	
Parts Listing		۲	0	
Logging		0	•	
	the privacy of any items. ** This is the default setting for	any timeline updates. You can overri	of your vehicles profile. You can come ba de these on a post by post basis to have a pdates - it will control access to the overall	mix of public/private items. Changin

Now the profile will be available in the Workshop area of your site. You can add anything to that profile by clicking on the vehicle link in the Workshop management area.

2.2. Notifying an owner (the customer)

Once you have a project setup, you then need to Notify the Owner. This is so that they can set their password, and see the Project details that you upload. *Until you've notified the Owner, and they have registered, they will not see any details you upload*

• Go into Current Vehicles

GlobalWorkshop) = f	Home Search						
	Worl	kshop Manage your	cuphictor			+ Create new vehicle prof	Sie 🚅 Restore fro	um archive
L Dashboard		K31 top Mariage your	Venicies			A CLEAR COMPANY AND A CLEAR AND AND A CLEAR AND AND A CLEAR AND		
Unpublished Updates (8)								
Recent Timeline Updates	Add	To Workshop						
	Click	the New Vehicle Profile butto				Ise this for any vehicle that doe		
Current Vehicles	more	to remote mus your witchives	(this won't be dele	eted). To mov	ve it back from the archives	Click Restore from Arches to add	a that profile back to y	your current workshop.
	more	eo venicie into your fo <mark>c</mark> hives	(this won't be del	eted). To mov	ve it back from the archives	cack nestore from archives to da	I that profile back to y	your current workshop.
🖬 Image Library	-	ur workshop Vehicles you		eted). To mo	ve it back from the archives	ciick nesiore from nrot nes io au	a that prome back to y	your current workshop.
Current Vehicles Image Ubrary RoPut Guest Passes	-			eted). To mo	re it back from the archives	ciale restore from and res to ada	a that profile back to y	your current workshop.
 Image Library torut Guest Passes 	-			eted). To mov	Last update		Actions	your current workshop.
 Image Library torut Guest Passes 	-	ur workshop Vehicles you	ı can update					Archive Vehicle
image Library tons Guest Passes All Users All Users	In yo	ur workshop Vehicles you Code/Name	u can update Owner		Last update		Actions	
Image Library TOPLE Guest Passes Al Users	In yo	ur workshop vehicles you Code/Name 2021 Ford Escort R5200	owner Joe Bloggs		Last update		Actions	

- Click on **Notify Owner** beside the customer's car
- A popup will appear allowing you to customise the message sent to the customer

Notify customer	
Click Send Notification button below to send an email to this user. They will receive a URL, which when clicked on, will allow account and view their vehicle profile on this site.	them to create ar
They must use this URL to sign up to the site with. Otherwise the account will not be activated. You can customise the mess	sage below
Dear <first name="">,</first>	
The team at GlobalWorkshop Demo2 have created a vehicle profile for you on The Training Ground. This profile contains be updates as your car progresses through the factory. You can also add your own updates to your build history. This gives yo one of a kind, documented build history of your car to show off with your family and friends.	
To register your account for your car, click this link below.	
https://training.globalworkshop.com/ <their unique="" url=""></their>	
Cancel	Send Notification
Currer L	

- · Once you click send, an email will be delivered to them, prompting them to register
- The Owner will receive an email, with a link in it, prompting them to register
- Once they have completed registration the Notify Owner button will disappear
- Then they will get updates as you post them.

Note: The Notify Owner button only disappears once the Owner has registered for their profile.

2.3. Editing the Project

If you make a mistake, or want to edit your project

• Go to the Project Profile (by either Workshop > Click on Name, or Dashboard > Click on Project)



- Click on the Gear Symbol to the bottom left of the project
- · You will then get the same screen as when you created the project to change any details

2.4. Deleting a Project

If you make a mistake, and want to delete a project do the following

- Go to the Project Profile (by either Workshop > Click on Name, or Dashboard > Click on Project)
- Click on the Gear Symbol to the bottom left of the project
- Click on Delete Profile

😭 GlobalWorkshop	≡ 🕈 Home Search	
Your Vehicle Profile	Edit Vehicle profile	
🖹 Delete Profile		
	General Details - required	
	Type Car	v
	Name Fraser SP330	ĉ.
	Personalised r	name for this project
	Year 2021	~
	Manufacturing	g Year
	Make Fraser	

• You will be prompted to enter in text to confirm, then press the confirm button

DELETE P	OFILE	
You are ab	t to delete the profile 2021 Fraser SP330 owned by Rowan Hick <rowan.hick+ts3@gmail.com></rowan.hick+ts3@gmail.com>	
LTT	E E	
here and he		
The second se		
The follow	will delete this vehicle profile - you, sed to type in the words "I confirm this will be deleted" - as the	here is no recovery from deletion.
The follow	will delete this vehicle profile - you yed to type in the words "I confirm this will be deleted" - as the Confirm deletion	here is no recovery from deletion.
The follow		
The follow	Confirm deletion	

For any project with existing timeline entries, please contact support@globalworkshop.ws and we will schedule deletion of the project for you.

2.5. Changing the owner of a Project

This is a feature on the roadmap, for now we will handle this for you. Please contact support@globalworkshop.ws and we will assist

2.6. Protip: Your own vehicles vs your Customers

The above steps are for your customers vehicles. If you have your own, or your company vehicles that you would like to manage on GlobalWorkshop, then you should just select your Personal details when adding a project.

3. Project Timeline Updates

3.1. Overview

Timeline updates are what you use to record progress on a project. Each project can have an unlimited number of timeline updates - we recommend at least once a week on active projects. We've found customers are incredibly fast from the time you click Publish Now till when they login - usually in under an hour. They really do appreciate their updates to their projects!

You can create updates for work you do now, or, work you've done in the past and the projects history. These can be also used to capture events, maintenance, race wins and more. Anything that happens on a particular date with Photos or Videos?record it in the timeline.

These timeline entries can be for the owner, or you can keep them locked to the Workshop.

3.2. How does this work

After you have created a profile for a customer vehicle, at any time you can Publish a Timeline Update. You create the update with some description - what it was for, along with any images, then publish it. The customer gets notified of the update, they can then login and see their update.

3.3. Instructions



- Go into Workshop > (Select a Car Profile) for the project you want to update.
- Click Post Timeline Update

	2021-10-31
	* Required. If you're updating information that occurred in the past, set this date here to correctly reflect the vehicles history
Headline	Installed new cams
	* Required - This is shown in your vehicles timeline
Notes	Higher lift cams with more overlap to increase mid-range torque. Fitted and road tested.
Privacy	Public anyone can see this and share this, logged in/logged out.
Privacy	Public anyone can see this and share this, logged in/logged out. Restricted workshop, owner, and all owners guest passes can see this
Privacy	

- Fill out headline, notes, choose a privacy level
- Click Next
- The timeline update will be automatically saved. At this point you can add photos.
- Drag and drop photos from your desktop on

Post Timeline Entry	×
You can add photos to your update. Upto a maximum of 30 photos. Drag and Drop images from your desktop, into the box below. Then press Start Upload and Wait until all files have uploaded.	
Drop files here to upload	
Add Video Upload Photo	s

Post Timeline Er	ntry			
ou can add photos to you nd Wait until all files have		of 30 photos. Drag and Drop images from your desktop, into	the box below. Then press	Start Upload
	and the second s	200		
0.6 MiB	0.5 MiB	0.7 MiB		
Add Video			emove Photos Up	pload Photos

Click Upload Photos, wait for a green tick to appear beside each photo. (OR) if you don't want photos then click - Skip, to go
straight to publishing. If your customer has not been notified, and not registered an account yet, this is what you will see:**

is timeline upd
and Publish N
praft' to revisit i m. As well any
g in and
ß
g

- Click on Save Draft to save it and come back later (OR) Click Save and Publish Now. If the customer has registered then
 they will be send a notification email and app notification if they've installed one of the mobile apps.
 Note: When you're publishing the timeline update, you can also provide a personalised message to the customer, this is
 shown only to the customer in the email sent to them.
- Once you save, this will be the timeline entry



• After you've created a timeline update, it will appear in the projects timeline.

GlobalWorkshop	≡ ff Home Search	Q-
Rowan Hick	2021 Fraser Special Projects Fraser SP330	Post Timeline Update
4	All Projects - 2021 Fraser SP330 - Vehicle Profile	
	Latest updates	
to prove and a distant data from	Rowan Hick published an update for 31 Oct 2021	1 day ago 🚔 Private
2021 Fraser SP330 아 🗎	Installed new cams	► View All Details @ Edit
😭 Main Profile Page	Child Reports Ingine	
	Higher lift cams with more overlap to increase mid-range torque. Fitted and road tested.	
Customer View (1)		4
Workshop Only (0)		
🚆 All Build Reports		
Specifications		

3.4. Comments

When you've published a timeline update, and the owner has registered, you both get the chance to comment on an update

omments	
Joe Bloggs Excellent work, thank you !	less thur a minute ago REMAVE
N	
✓ Post	di.

3.5. Individual photo management features

You have a number of features to help you easily organise and manage photos on project.

- View the timeline update by clicking the View button
- To the bottom right of each photo is an Edit icon.
- Click on bring up the Photo Editing features



- To Delete or Rotate Photos click the respective buttons
- To **Download an Original** click on the Original button. Noting that EXIF data will be retained on the original photo, so be careful sharing the photo_

3.5.1. To move a photo to a different update

- As per the above steps, open Edit Image details view
- Click on the move to update button
- A new page will appear, allowing you to choose different updates to move it to
- Select the destination update
- Click Move Photo



· You will need to wait a few moments as the photo data is moved

GlobalWorkshop	E 🕈 Home Search	6	0-
Rowan Hick	Dyno Tuning Session Draft	● Comment CPEdit 로 Split @ Dele	te
	My Vehides - 2021 Fraser 5930		
Derrow and an ended of the building	h. M		
2021 Fraser SP330 이 문	by Me on 31 Oct, 2021		. 1
🚔 Main Profile Page			1
TIMELINE			
Customer View (1)			- 18
Workshop Only (0)			- 18
YOUR DRAFT UPDATES			- 18
😢 Dyno Tuning Session	O Edit		- 18
*			

3.5.2. Photo Sorting within a timeline update

• To change photo order Click on Edit on the timeline update.



· When the editing window appears, you'll see Sort Photos

🖞 Post Timeline I	Intry		×
Date	2021-10-31 00:00:00 UTC		
	\star Required. If you're updating information that occurred in the past, set this date here to correct the vehicles history	y reflect	
Headline	Installed new cams		
	* Required - This is shown in your vehicles timeline		
Notes	Higher lift cams with more overlap to increase mid-range torque. Fitted and road tested.		
Privacy	 Public anyone can see this and share this, logged in/logged out. 	11.	
	• Restricted workshop, owner, and all owners guest passes can see this		
	O Private workshop, owner, and all owners guest passes that are set to private can see this		
	O Workshop only workshop (Clever Robots Limited) can view this.		
Add Photos So	rt Photos Add Video d	ancel	Update

- You can then click on a photo and drag it to a new position
- You can repeat for as many photos as you like, then click on Save:



3.6. Video features

As well as photos, you can upload videos to GlobalWorkshop. We take care of all the painful parts of video management online to make this as seamless and as easy for you as possible. Namely *converting* the videos into web & mobile friendly formats, and *resizing* large videos to suit downloading - however we prioritise **quality over size** as we want to showcase the best of your work.

In future updates we may provide extra settings to allow you to change video quality.

3.6.1. Adding a video

• When you create an update you can press the "Add Video" button

Post Timeline Entry		3
ou can add photos to your update. Upto a maximum of 30 photos. Drag a nd Wait until all files have uploaded.	and Drop images from your desktop, into the box below. The	n press Start Upload
Drop files	here to upload	
Add Video	Skip adding Photos	Upload Photos
Post Timeline Entry	points to note ntly have 240.0 mins remaining. This updates on the 1s	
 Total minutes will be deducted from your account - you current After uploading the video, it is converted to be ready to show - The original video file is discorded. 	points to note ntly have 240.0 mins remaining. This updates on the 1s	

• Drag and drop a video on and press upload video

Post Timeline Entry		×
Please drop your video file on the box below to upload. Ir	mportant points to note	
Max video size - 4GB		
 Total minutes will be deducted from your account - After uploading the video, it is converted to be ready 	you currently have 240.0 mins remaining. This updates on the 1st of the more to show on the web at 10800 HD.	nth.
The original video file is discarded.	y consider on the resolution of the	
Fraser SP330 Dyno Run.mp4		
10.1 MiB		
	Skip adding Videos Remove Video Uploa	id Video

Post Timeline Entry	×
Please drop your video file on the box below to upload. Important points to note	
Max video size - 4GB	
 Total minutes will be deducted from your account - you currently have 240.0 mins remaining. This updates on the 1st of the mont After uploading the video, it is converted to be ready to show on the web at 1080p HD. The original video file is discarded. 	th.
Fraser SP330 Dyno Run.mp4	
10.1 MiB	
Uploading video, please wait	Video

• After a few minutes (depending on video size) then you will be shown a confirmation message, and can view the video



3.6.2. Accelerated video upload

Video files can get exceedingly large, as such upload speed can be an issue for some where time is of upmost importance getting videos to their customers. We can offer **Accelerated Endpoint Uploading** which is a very fancy way of saying uploading is speed up. This is done by uploading video data to servers geographically (and thus speed wise) closer to your location from where our servers are. This is primarily beneficial for APAC, EU, and UK regions. Some locations in the Americas this may be beneficial. The further you are geographically from the Eastern US seaboard the greater the impact will be.

For all showcase pro+ accounts this is enabled by default as at November 2021, this may change in future.

Talk to us if you wish to enable for your account support@globalworkshop.ws

3.6.3. Additional video notes

Feature	Support
Upload formats	.MOV, .MP4, .AVI, .MKV
Display Size	1080P landscape or portrait
Rotation	Will detect and auto-rotate from phone uploads
Default Colour Space	SDR colour space
HDR10	In R&D this time HDR/HDR10+ is <i>not supported</i> but on request we will add to your account with an extra charge
Dolby Vision	In R&D At this time dolby vision is <i>not supported</i> but on request we will add to your account with an extra charge
Known tested devices	Samsung Galaxy 20 series, iPhone 12, iPhone 13 Pro, Sony Xperia, Sony A7R

3.7. Draft updates

Any Timeline Updates that you have not published will appear in the drafts area on the left hand side navigation of the project, in yellow

- Click on the timeline entry in the draft area
- Click on the Edit button at the top to edit it

GlobalWorkshop	≡ 🕈 Home Search	0-1
Rowan Hick	Dyno Tuning Session Draft Restricted - 0 Comments	Comment Officie at spate Delete
	My Vehicles 2021 Fraser SP330.	
2021 Fraser SP330 © ≣	by Me on 31	Oct, 2021
🚔 Main Profile Page		
TIMELINE		
Eustomer View (1)		
Workshop Only (0)		
YOUR DRAFT UPDATES		
😰 Dyno Tuning Session	ð í dt	
TIMELINE COLLECTIONS 36		
👷 All Build Reports		
100000		

As an account administrator, you can also view these drafts here, across all projects.

GlobalWorkshop	≡ ff Home Search						0.
ACTIVITY	Pending Timeline U	pdates All drafts that haven't b	een sent				
Unpublished Updates (1)							
Recent Timeline Updates							
	Customer/Project	Update Headline	Media	Privacy	Date		
gjil Current Vehicles	Fraser SP330 Rowan Hick	Dyno Tuning Session	1	& Restricted	1 day	View / Edit	
Image Library	Normal Pick						
▲ Guest Passes							

3.8. Hints

- Use detail photos. Try not to cram everything in one photo when viewing on the web it's better to have a lot more detail photos
- Record any important details for later use eg shock settings, tyre pressures etc. GlobalWorkshop never forgets. Scraps of paper do!
- Take photos of dyno charts, alignment readouts and more to record them. For anything private like invoices, set the update to private.

4. Advanced - Tags & Collections

On large and long running projects you may want extra control over the timeline - so you can easily find information in future. The following features are useful projects that have dozens to hundreds of updates and want that extra level of control.

Tags can be applied to a timeline update to categorise the update :



In addition to the normal timeline accessible which is a chronological list of the timeline updates, **collections** are a filtered subset of updates in that timeline.

Collections *dynamically update* based on the rules you setup - so for instance you create a collection called 'Dyno Tuning' that shows any updates with the 'Dyno' tag. As soon as you create a new timeline update, and tag it with 'Dyno' it all automatically appear in the Dyno Tuning collection.



Example uses :

- Create collections based on time, for the stages over time of a project. This lets the customer easily see when things happened on their project.
- Create collections based on tag, to group different timeline updates. E.g. have a collections for "Reference Photos" and "Parts Refinishing"

4.1. Set up tags

- · Go to the project profile
- Click on Tags on the bottom left of the navigation area :

0	Gallery	
Ŧ	Competition History (0)	
•	Parts (0)	
ø	Files (0)	
	Reports	
9	Collections	
۲	Tags	
	Guest Passes	2014-21 © Clever Robots Limited

· You can create any number of tags, simply click new tag top right, and enter a tag name and save

Tags				
My Vehicles > Fraser	SP330 > Tags			
Position		Tag	Ac	ctions
			New Top Leve	el Tag
Create New Tag				
My Vehicles - Clubman SP 330 - Tags				
Details				
	Tag Name Create New Tag			

• Move the tags up and down using the arrow buttons

Positi	on Tag	Actions
		New Top Level Tag
$+ \Psi$	Build Report	I Edit Sub Tag ☐ Delete
↑ ↓	Dyno Tuning	☞ Edit Sub Tag
↑ ↓	Track Days	I Constant Consta

• You can also create a sub tag, this is "nested" inside it's parent tag. This allows you to have more granular control over tags for large and complex projects.

USILI	on Tag	Actions
		👒 N 🛛 Top Level Tag
• •	Build Report	🕼 Edit 💊 New Sub Tag 📋 Delete
•	Chassis	🕼 Edit 🔷 New Sub Tag 📋 Delete
• •	Engine	🕼 Edit 💊 New Sub Tag 📋 Delete
ν Ψ	Suspension	🕼 Edit 💊 New Sub Tag 📋 Delete
• •	Dyno Tuning	🕼 Edit 🛛 Sub Tag 📋 Delete
ν Ψ	Track Days	🕼 Edit 🛛 💊 New Sub Tag 💼 Delete

Note: Tags are setup per project, allowing you to tailor your preferred structure by each project

4.2. Tagging an Update

• After setting up tags, a new item will appear in the main timeline update view, enabling you to select a tag. Simply click in it and the tags list will appear.

Date	2021-10-31 00:00:00 UTC
	* Required. If you're updating information that occurred in the past the vehicles history
Headline	Installed new cams
	* Required - This is shown in your vehicles timeline
Tags	Build Report - Engine 🚳
	* Optional. Use tags to classify this update.
Notes	Higher lift cams with more overlap to increase mid-range torque.
Privacy	Workshop only workshop (Clever Robots Limited) can view this.

4.3. Creating a Timeline Collection

Click on the tools symbol beside timeline collections

GlobalWorkshop	■ 🖷 Home Search	01
Rowan Hick	2021 Fraser Special Projects Fraser SP330	🖀 Post Timeline Update
	My Vehicles 2021 Fraser SP330 Vehicle Profile	
	Latest updates	
In the second section of the second section of	Rowan Hick published an update for 31 Oct 2021	1 day apr & Restricted
2021 Fraser SP330 이 ==	Dyno Tuning Session	► View All Details GP Edit
👷 Main Profile Page		
TIMELINE	and the second sec	
Eustomer View (2)		
🔲 Workshop Only (0)		
TIMELINE COLLECTIONS		
All Build Reports	Rowan Hick published an update for 31 Oct 2021	t stay ago 🛱 Private

· Click on the new collection button, you will get this form

Vehicles Clubman SP 330 Collections		
Collection details		
Collection Name	Track days	
	Show in side menu, keep it short	
Description	1	
	Enter a description	
	Show this collection in side menu, otherwise access it from the collections area.	
	-	
Collection Rules		
Collection Rules	Date From (inclusive). Optional, if set any entries before this date will be excluded.	
	Date From (inclusive). Optional, if set any entries before this date will be excluded.	
	Date From (inclusive). Optional, if set any entries before this date will be excluded. Date To (inclusive). Optional, if set any entries after this date will be excluded.	
Date Range	Date To (inclusive), Optional, if set any entries after this date will be excluded.	
Date Range	Date To (inclusive). Optional, if set any entries after this date will be excluded. I include Public updates	
Date Range	Date To (inclusive). Optional, if set any entries after this date will be excluded. Include Public updates Include Member updates	
Date Range	Date To (inclusive). Optional, if set any entries after this date will be excluded. Include Public updates Include Member updates Include Private updates (note if checked this collection will only be visible to you / workshop)	

• You can give the collection a name that appears in the left hand navigation area, and a description that appears in the header :



- To choose what the collection will select from, you can choose form any of the following options:
- A date range to filter the items between that range. This is useful to setup a list of build stages over time
- The privacy level to highlight what to include
- Tags to pick up only specific updates, which is useful to pick up different categories, or locations of items in a timeline, like so:
- Once you Create the collection it will appear in the left hand navigation of the project

GlobalWorkshop	E ft Home Search.	0-
Rowan Hick	Fraser SP330 / Timeline Collections / All Build Reports	+ Edit Collection
2021 Fraser SP330	Rowan Hick published an update for 31 Oct 2021 Installed new cams Fields Revorts region Higher lift cams with more overlap to increase mid-range torque. Fitted and road tested.	T dayago là Private ▶ View Al Details (2) Edit
SER Main Profile Page Thatshe Customer View (2) Workshop Only (0)		
TIMELINE COLLECTIONS X		
LIBRARY		

You do not add timeline updates to a collection, this is a 'smart filter' that selects timeline updates to display based on rules only

• To edit, or delete timeline collections, click on the collection quick link, or collections at the bottom left of the navigation. You will see this screen

ollection Maintenance					New Collection
Vehicles Clubman SP 330 Collections					
our Collections					
Name	Side Menu	Tags	Date Range	Privacy levels	Actions
2014-2015 Driving it	Ŷ		From: 2014-10-04	Public updates included Member updates included	 ↓ Q I2 ■
2014 Road Testing and Certification	Y		From: 2014-07-19 To: 2014-10-04	Public updates included Member updates included	↑ ¥ Q 7 [
2014 Final Assembly and Show	Y		From: 2014-01-01 To: 2014-07-20	Public updates included Member updates included	↑ ↓ Q 2 0
2013 Painting	Y		From: 2013-10-02 To: 2013-12-31	Public updates included Member updates included	↑ ↓ Q 22
2013 Chassis finishing	Y		From: 2013-08-01 To: 2013-10-01	Public updates included Member updates included	↑ ↓ Q 🖉 🕻
2013 Plumbing and induction	Y		From: 2012-12-31 To: 2013-08-01	Public updates included Member updates included	* + Q Z
2012 Chassis & Engine fitting	Y		From: 2012-08-01 To: 2012-12-01	Public updates included Member updates included	↑ ¥ Q 2 0
2012 Research	Y		From: 2012-01-01 To: 2012-07-31	Public updates included Member updates included	↑ ↓ Q Z
Favourites	Y	Favourites		Public updates included Member updates included Private updates included	↑ ¥ Q 77 1
Tuning	Y	Tuning		Public updates included Member updates included Private updates included	↑ ¥ Q 7 🛛
Track Days	.¥⊘	Track Days		Public updates included Member updates included Private updates included	* ¥ Q 7 🛛
Important Documents	¥	S Documents		Public updates included Member updates included Private updates included	↑ ↓ Q Z

5. Additional Project Features

5.1. Spec Sheet

This is a free form notepad, letting you write anything down you want about the vehicle. There is no formatting or attachments - simply text. Anything you want from Cam duration, to how many volts your battery is putting out.

5.2. Gallery

This is a combination of pictures from all of the timeline updates - so you can easily scroll through the entire collection of pictures on the vehicle, and any general pictures. You can upload pictures directly in the gallery section, however these pictures here won't be shown in the timeline area. Use this for the dozen or show "overall best" pictures of the vehicle.

5.3. Competition History

This lets you record any significant race track, rally course, road or concours events the vehicle has completed in. We have a number of fields to track everything from your local hill climb, to Le Mans. Keep theses significant milestones recorded.

5.4. Logging

(only if the site has log templates). You can review "more about logging here":/help_guides/1 Logging lets you store various data points over time about the vehicle, this is not the same as a telemetry file which may have hundreds of data points a second, this is for things like suspension settings, service history and the like.

5.5. Parts

You can store a parts listing for the vehicle - as simple or as detailed as you like. Each part is categorised into the area of the vehicle (eg engine vs cooling) and a status, so you can keep track of parts you may have ordered, versus those you have installed.

6. Guest Passes

Guest Passes let owners share the vehicle with their friends/associates/team members, without you having to create new accounts on the site. This enables people to share their pride and joy selectively.

6.1. What is it

A guest pass is associated with a vehicle profile, it is a link that is sent to an individual email address, 1 guest pass for 1 email address. The person receiving it can click on the link and see the vehicle profile without needing to have an account on the site.

6.2. Creating a Pass

To create a guest pass the owner of the profile must go to *My Garage* > (*select vehicle*) > *Guest Passes* or on a Vehicle Profile click on *Guest Passes* on the left hand side. Click *New Guest Pass* and follow the instructions. Each guest pass has these two options the owner can enable:

- Allow Subscriptions This is a great marketing feature of the site, if the guest pass holder subscribes, every time the vehicle is updated by the workshop or the owner, the guest pass holder is emailed. For instance if there is 10 guest passes on the account, not only does the owner get emailed when you update the profile, any of those guest passes who have subscribed, also get emailed.
- Enable Private access If selected, any timeline updates, or sections of the profile that are marked as private are shown to the guest pass holder. If the vehicle profile itself is private, then this feature is checked by default.

6.3. Receiving a Guest Pass

The guest pass holder, receives an email with their unique link in the email. They click on the link, get taken to the site - to which they are immediately on the vehicle profile and can view everything they have access to on the profile. If the allow subscriptions feature is enabled for the guest pass, in the top right, they have a button prompting them to subscribe.

6.4. FAQ's

5.4.1. What happens if a guest pass gets shared ?

As a guest pass is emailed - there is nothing preventing this being shared by the person receiving the guest pass. If a guest pass is shared, there is detection mechanisms in place to warn the owner if the guest pass is used more than 15 times in a 24hr period, the owner will be emailed to warn them. If it used more than 100 times it is automatically revoked so that any subsequent attempts to use that guest pass will be denied.

5.4.2. Can the guest pass receiver see anything else ?

No. If the person tries to go anywhere else on the site they will be automatically sent to the home page, or in some cases a security warning will be logged and error message shown.

5.5. Can the workshop send a guest pass to a vehicle ?

Yes, this a new feature as of October 2021.

7. Privacy Settings in more detail

Different owners have varying levels of privacy from the headline grabbing owner that wants their pride and joy on every page of the internet, to the private collector who doesn't want anyone knowing about their collection. GlobalWorkshop caters to both ends of the spectrum. There are 4 privacy levels that can be applied to most anything on a Vehicle Profile. Public, Restricted, Private, Workshop Only. These affect how and what gets shared or kept private.

7.1. How it works

There are 4 privacy settings. Public, Restricted, Private and Workshop Only. These settings apply to the *main profile and timeline*, the individual *timeline updates*, and the sections on the profile. These settings are controlled by the workshop initially, then the owner. Each individual timeline update can have it's own privacy setting.

- **Public** will make the item visible on any public sections of the site. It will (most likely) be picked up by search engines, and can be shared around on social media. Any members only, or private items would *not* be shown on a public profile.
- **Restricted** will make the item available to only logged in users of the site other customers, or owners, as well as the site administrators. Guest passes can get access to members only items, see below.
- **Private** is only for the owner, and the workshop administrator, to view that item. It will not be visible to other users. Guest passes can optionally get access to private items, see guest passes below.
- Workshop Only ensures that Timeline updates are only visible to the Account holder and Administrators, these are not

7.2. When you change a vehicles privacy

This will affect the profile page, and any sections of the profile, of that vehicle. Please note that it does not affect individual timeline updates. So if you have a "Private" profile and choose to make it "Members Only", all of the existing timeline updates will remain as Private. This is done so that - even in the case of an accidental privacy change - private updates remain private. You can retroactively change any updates to members only or public if you wish.

7.3. Guest Passes

A guest pass allows any members only updates, or sections of the profile, to be shown to the person who is given that guest pass. This lets you share your profile with friends, without having to open up the profile to the outside world. *Private* content can be shared with Guest Pass holders, by selecting the flag to allow private content. Any timeline updates, or sections of the profile, that are private - would be shown to these guest pass holders.

7.4. A note on Security

Here at GlobalWorkshop we take security seriously. One of our significant features of the site is the private storage system. For our Enterprise accounts - each and every image that is on a profile or timeline update flagged private or members only, is checked whether the person logged in, or guest pass, has access to that image. Thus even if the URL (address) of the image was copied and emailed, that image would not be accessible. Whilst we do our best, ultimately, if you can see the image on site, someone logged in who has been granted access could copy that image itself, take a screen shot and distribute. Please ensure you keep this in mind when granting private guest passes.

If you have comments or concerns on privacy you can always contact us on info@globalworkshop.ws

8. Reports

GlobalWorkshop allows you to generate downloadable PDF reports of a Project's information. This allows you to generate hardcopy printable documentation.



8.1. Instructions

- · Go to a project profile
- Click on **Reports** on the bottom left

GlobalWorkshop	■ A Home Search		N -
Rowan Hick	Reports		- 1
	My Vehicles Fraser 5P330 Reports		_
2021 Fraser SP330		. This will create a PDF compiling all project timeline entries. Depending on the size of your project this may take some time (upto ready for download. All reports created will be included in your storage allocation - you can delete previously created reports at an	y
j Main Profile Page	What to print	All entries, will be visible to customer V	- 1
TIMELINE		Choose from All, Selected, or a single entry to report	- 1
Customer View (1)	Description		- 11
Workshop Only (0)		You can give this report a title, which will be included on the front page. Eg 'January Progress'	- 11
YOUR DRAFT UPDATES		Include Competition History	- 11
(2" Dyno Tuning Session			- 1
옷 Test		Include Specification Sheet	- 11
		Print images with captions full width	- 11
LIBARY		Reverse Chronological Order	- 11
Specifications		Create Report	- 11
🖆 Gallery			_

- Select what you want the report to include. You can choose all timeline entries, or a specific entry, or entries across a particular date
- You have a number of settings to configure how the report looks
- Press Create Report , it will start generating the report. This may take a few minutes

Reports list					
Report Date	Printed By	Description	Status	File Size	Actions
less than a minute	Rowan Hick	October Progress	PROCESSING	OPlease wait generating your report	

• Once it's completed you can download the report.

Report Date	Printed By	Description	Status	File Size	Actions
less than a minute	Rowan Hick	October Progress	FINISHED	1311.303 kb	& Download

· The report has all of the timeline entries selected, with all of the photos per each entry



8.2. ProTip: Custom Report layouts

Our **White glove** service will be glad to review the report layouts and provide a custom branded layout specific for your business. This is only available to White Glove accounts and may be subject to one off setup charges.

8.3. ProTip: Hard cover books

At the handover of a project, we have seen a number of our customers add that little bit extra to their client experience by using the Reports feature to generate a printable PDF of the entire history of the a build. You can send the PDF to almost any book/print publishing service to make a hard cover book from.

9. Administrator Users

You can setup logins for additional staff in your business. GlobalWorkshop has permission settings to allow you to control what staff have access to & can do.

9.1. Instructions

- Go to Administrators section
- Click on New Admin Account

GlobalWorkshop	≡ A Hor	me Search				Q-
ACTIVITY at Dashboard Updates (1)	Admini	strators for your a	account			New Admin Account
Recent Timeline Updates	Email	First Name	Last Name	Displayed as	Actions	l l
a Image Library	active	rowan.hick+ts3⊜gmail.com	Rowan	Hick		Profile Admin View Edit Ler
PEOPLE						<u>-</u> -
All Users Administrators		1				
HELP Help Center						

- Enter their name and email address
- Select the appropriate settings

GlobalWorkshop	E 🕈 Home Search	0.
ACTIVITY : Dashboard Unpublished Updates (1) Recent Timeline Updates WORKSHOP Selfe Current Vehicles	Create new admin user 1. Enter the email address, and name of the person you with 1: be an administrator 2. Choose the permissions the user is allowed 3. Click Save - the user will be emailed a link to complete settir ; up of their account. If they have an existing GlobalWorkshop User ID they can link it. Setup a new admin user	
image Library PEOPLE Guest Passes All Users Administrators HELP	First Name Last Name Email	
Help Center SETUP Cogging Templates Account Details Site Design	Administration Settings The following settings allow your users to administer the the site. Allowed to manage users Allowed to publish timeline updates, if unchecked they can only save drafts Allowed to set to any privacy level, if unchecked they can only select "Workshop Dnly" Allowed site setup (template changes etc) Save Details	-

• Click save details they will be emailed a link

٩	Search all conversations	14 1 1	6 Active -	0 🕸 🏢	0	kabul Alarishop	R
÷				1 of 4,512	<	>	
	Please complete your account setup on Help Exam	nple Site 📧	emai D Inbox x Dan	o Emails x	0		
-	Help Example Site Notifications no-reply@globalworkshop.ws via amazonses.com		8:48 AM	(0 minutes ago) 🛛 🏠	4	I	Ø
	You have been sent this email to setup an administrator account for Clever Robots Lin	nited's GlobalWorks	hop site.				
	To complete this, click on the link below. You will be prompted to setup your password	and supply some b	asic details.				
	https://helpexample.globalworkshop.com/complete_registration	=joe+teamexample	@globalworkshop.ws				+
	Thanks,						
	The GlobalWorkshop Team						
	If you believe you've been sent this email in error contact supportigglobalworkshop.ws	s and we'll look into	it for you.				
	← Reply ≪ Reply all → Forward						

- · And just like the account holder setup, they will click on the link and set their password
- They must agree to the terms of using the site and privacy policy

C helpexample.globalworkshop.com/complete_registratic	g_email=joe+teamexample@g	debalworkshop ws	Q 🔅 🇯
		HOME	
	Com	plete Registration	
Hi Joe,	First Name	joe	
Complete the details to your right to login to the Help Example Site		Bigs	*
In addition to getting updates from the factory on your vehicle, you will be able to view other work by Clever Robots Limited and keep your project upto date. For your security, please keep your login details confidential.	Nickname Display name Email	Full Name your full name above will appear beside your profile, comments etc. Notifiant work to keep your name private 7 them thoose this option. pertrainesungleightableotkep and Your email address of investe that based outside of Heip Lampile Site it is used for intelfaction and neoletters from Heip Example Site and Global/Porsshop	
your regim vestions continuential. You can create guest passes if you wish to share your project with friends/co-workers or family	Select your country	New Zealand	
	Password	Pease enter a password - minimum & characters	
	Password	Confirm your password	
	Camplena Regulturion	I have read, understood the Terms of Use and Privacy and Data Policy and an over the age of 13.	

• After doing this they will be logged in to see your GlobalWorkshop account.

9.2. Restricting staff publishing rights

A common workflow is allowing your staff to take updates throughout their work week, but have one project manager/client representative to check photos/updates and publish to customers.

• Setup staff to have these settings:

First Name	Joe
Last Name	Bloggs
Email	joe+teamexample@globalworkshop.ws
dministration Settings	Iminister the the site.
	Iminister the the site.
	Allowed to manage users
	 Allowed to manage users Allowed to publish timeline updates, if unchecked they can only save drafts

• When a user with those settings create a timeline update, they will see only this privacy level. Ensuring any timeline updates they make from the web, or mobile apps, are only visible to your Workshop account - not the customers view.

Date	2021-10-31
	* Required. If you're updating information that occurred in the past, set this date here to correctly reflect the vehicles history
Headline	
	* Required - This is shown in your vehicles timeline
Notes	
Privacy	Workshop only workshop (Clever Robots Limited) can view this.

• After your team have taken updates, you can either **move a photo** from one of their updates to a customer facing timeline entry (OR) edit the timeline entry and change the privacy level so the customer sees it.

10. Site Design Features

Documentation in next update of this help guide

11. Account Settings

Documentation in next update of this help guide