JOBLINK · DOCUMENTS · CUSTOMER GUIDE

Cloud enrolment and connecting a NAS

SharePoint · OneDrive for Business · Google Drive · Synology, QNAP, UGREEN, ASUSTOR, TerraMaster and other SMB / NFS storage

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What this guide covers

JobLink can keep a copy of your **Documents** folders in Microsoft 365, Google Workspace or on your office NAS, with the same folders and the same people able to open them. It can also move older files off the JobLink server onto that storage to free up space, while staff still open them from JobLink.

Part	For	What's in it
Part 1 · Overview	Owners, office managers, Document Managers	What gets copied, who sees what, choosing a place, moving older files, day-to-day use, and a checklist of what to ask IT for.
Part 2 · Setup	Your IT person or managed IT provider	Step-by-step setup for Microsoft 365, Google Workspace and each NAS brand, then the JobLink settings, first send, and fixing problems.

Nothing is sent until you say so
Nothing leaves JobLink until a Settings administrator adds a connection, presses **Test**, turns it on and presses **Send all**. You can set everything up and test it before any file is sent.

You'll need: JobLink with the Documents module and the **Cloud and NAS copies** feature (Standard plan or above), and a JobLink user with **Settings** (Administration) rights.

PART 1

Overview

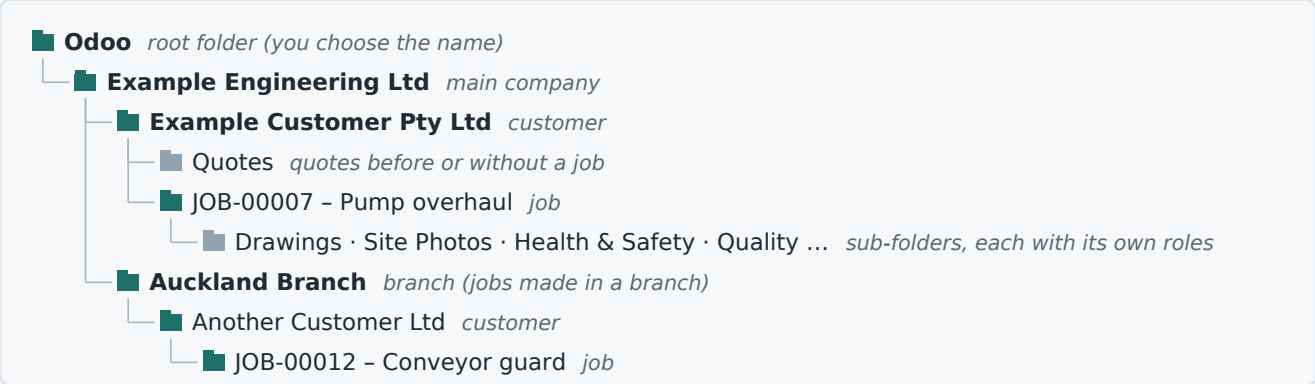
For owners, office managers and Document Managers

1.1 What it does

- **JobLink stays the master.** Files are uploaded, versioned and approved in JobLink. The copy is one way: JobLink → cloud or NAS. Changes made to the copy are **not** brought back.
- **Same folders.** The copy mirrors the Documents tree: each main company, its branches, your customers, each job and its sub-folders (Drawings, Site Photos, Health & Safety, Quality …).
- **Same people.** Each JobLink user role is matched to a group in Microsoft, Google or on the NAS. People get read-only access to the folders their role can open in JobLink, and nothing more.
- **Automatic.** New uploads and new versions are copied within about 10 minutes. Moves, renames and archiving follow. A file deleted in JobLink goes to a *_Deleted / date* folder, never destroyed.
- **Safe if the cloud is down.** Saving in JobLink never waits for the cloud or NAS. Copies queue and retry on their own.

1.2 The folder tree

This is what you'll see in SharePoint, Google Drive or on the NAS:



Jobs made in your main company sit straight under it. Jobs made in a branch sit under *main company / branch*. Your own companies never appear as customers. Company-wide folders (registers, inductions, guides, procedures) are copied too.

1.3 Choosing where the copy goes

You can add more than one place, for example SharePoint for the office and a NAS as a local backup. Each place is a **connection**.

Place	Best when	Folder permissions	You need
SharePoint	You use Microsoft 365 and Teams.	Automatic, per folder, from the role → group map.	Microsoft 365 Business (any plan with SharePoint), an admin to register an app.
OneDrive for Business	Staff work from the OneDrive app and sync folders to their PC.	Automatic (it's a SharePoint library underneath).	As SharePoint. JobLink copies into **one shared library**, not each person's own OneDrive.
Google Drive	You use Google Workspace.	Automatic, per folder (limited-access folders).	Google Workspace with **Shared Drives** (Business Standard or above), a Google Cloud project.
NAS — Synology	You want a copy in the office, on your own hardware.	Automatic, per folder (DSM 7).	A Synology on DSM 7, a share, an admin service account.

Place	Best when	Folder permissions	You need
NAS — QNAP, UGREEN, ASUSTOR, TerraMaster, other	As above.	Set by IT on the NAS at share or top-folder level.	Any model offering SMB 3 or NFS v3/v4.

1.4 Who can see what

- Each sub-folder gets the groups of the roles that can open it in JobLink. For example, *Invoices & Purchases* goes to the money roles; *Health & Safety* to the office and H&S roles.
- The **job crew and project manager** also get personal read access to the job's *Site Photos*, *Drawings* and *Plans & Specifications*. This works when their JobLink login email is the same as their Microsoft or Google account.
- Parent folders (company, branch, customer, job) only let people browse down to what they may open.
- A role with **no group mapped** gets **no access** in that place. Nothing ever falls back to "everyone".
- Change a role's group, a folder's roles or the crew, and the access is updated on the next run. People taken off are removed.

Stays in JobLink
Never copied: private Health & Safety records (injury details, fitness declarations, items marked confidential). They stay in JobLink only.
Native CAD files (SOLIDWORKS, DWG, STEP) are **not** copied unless you tick *Also copy native drawing files* on the connection. Drawing PDFs are always copied.

1.5 Moving older files off the server (optional)

To keep the JobLink server and its backups small, you can choose **one** connection as the **archive**. After a set time, JobLink moves its own copy of older files there. Staff still open, preview and download them from JobLink as normal.

Setting	Default	What it means
Archive connection	empty	Empty = nothing is ever moved. Other connections stay plain copies.
Keep documents and photos for (days)	90	Documents, reports, invoices, photos and drawing PDFs. On a job, the days start when the job is finished (Completed, Invoiced or Done), or from the last change if that's later.
Keep native drawing files for (days)	7	SOLIDWORKS, DWG, STEP and the 3D web view. These are the big files.
Keep native drawing files while the job is open	off	Off: native files move after their days even on open jobs. On: they wait for the job to finish.

Never moved: private H&S records, issued Quality and compliance PDFs (Job Quality Reports, Isolation Certificates, Maintenance Compliance Reports), picture thumbnails, and files on open jobs (except native drawings, as above).

- A file moves only after it's copied to the archive and the copy is downloaded again and checked.
- A new version is always saved on the JobLink server first; its clock starts again.
- **Bring back** on a document puts the file back on the server. **Move back all** on the connection brings everything home (for example before changing the archive).
- If the archive can't be reached, staff see a plain message to try again shortly. Nothing breaks.

Backups
Once a file has moved, JobLink's own backup no longer contains it. The archive's version history and snapshots (SharePoint or Google version history, NAS snapshots) become its backup. Make sure they're turned on, and keep both backups from about the same time.

1.6 Day to day

Where	What you see
Documents → a document → **Copies** tab	One line per connection: **Queued**, **Copied** (with a link), **Error** (with the reason) and **Retry**. Also **On the system** or **Moved to …** and **Bring back**.
Documents → filter **Copy errors**	Every document whose copy failed, to retry or pass to IT.
Settings → Documents → **Manage connections**	Each connection's last run, error count and **People not found**.

The Copies tab is shown to Document Managers and Settings administrators.

1.7 What to ask your IT person for

Send Part 2 of this guide to IT with this checklist. Tick the place(s) you chose.

	Ask IT to …
☐	Agree which JobLink roles need access, and create one group per role (Microsoft security group, Google group or NAS group). Add the right staff to each group.
☐	Make sure each person's JobLink login email is their Microsoft or Google sign-in email.
☐ Microsoft	Create a private SharePoint site (or library) and register the JobLink app with **Sites.Selected** and full control on that one site.
☐ Google	Create a Shared Drive, a service account with a JSON key, and add it as **Manager**.
☐ NAS	Create a share for JobLink, mount it on the JobLink server, and (Synology) give JobLink a DSM admin account.
☐	Turn on version history or snapshots on the place you'll use as the archive.
☐	Enter the details in JobLink, press **Test**, then **Send all**, and show you the result.

PART 2

Setup

For your IT person or managed IT provider

2.1 Before you start

- A JobLink user with **Settings** rights. Connection secrets are only visible to Settings administrators.
- The list of JobLink **User Roles** in use (Settings → Users → User Roles), so you can create one group per role that needs access.
- Staff JobLink login emails match their Microsoft 365 or Google Workspace accounts (for crew access).
- Where to find it in JobLink: **Settings → Documents → Copies to cloud and NAS → Manage connections → New**.

Handling secrets
Type secrets (client secret, DSM password, JSON key) straight into JobLink. Don't email them or paste them into tickets. JobLink never shows the Google key again after it's saved.

MICROSOFT 365

2.2 SharePoint or OneDrive for Business

JobLink signs in as an app with **Sites.Selected**, so it can only reach the one site you give it. It needs **full control** on that site so it can share folders with your groups.

1 **Create the site and a private library**
In SharePoint, create a site (for example *JobLink Documents*). Use its default *Documents* library or add a new one.

Keep the library **private**: only site owners. Remove *Everyone except external users* and any member groups. JobLink adds read access per folder; it can't take away access that the library already gives.

2 **Register the app in Microsoft Entra**
Entra admin centre → **App registrations → New registration**. Name: *JobLink Documents*. Single tenant. No redirect URI.

From **Overview**, note the **Directory (tenant) ID** and **Application (client) ID**.

3 **Give it the Sites.Selected permission**
API permissions → Add a permission → Microsoft Graph → Application permissions → Sites.Selected, then **Grant admin consent**.

4 **Create a secret or a certificate**
Certificates & secrets: either a **New client secret** (copy the *Value* once; set a calendar reminder before it expires) or upload a **certificate** (recommended; JobLink takes the PEM file).

5 **Give the app full control on that one site**
A SharePoint admin runs this once (PnP PowerShell shown; Microsoft Graph *POST /sites/{site-id}/permissions* works too):

```
Connect-PnPOnline -Url https://<tenant>-admin.sharepoint.com `
       -Interactive -ClientId <your PnP sign-in app ID>
$site = "https://<tenant>.sharepoint.com/sites/<site>"
$p = Grant-PnPAzureADAppSitePermission -AppId <JobLink app ID> `
       -DisplayName "JobLink Documents" -Site $site -Permissions Write
Set-PnPAzureADAppSitePermission -Site $site -PermissionId $p.Id -Permissions FullControl
```

6 **Create a security group per role**
Entra → **Groups → New group**, type **Security**, for example *JobLink - Project Managers*. Add members. Note each group's **Object ID**.

7 **Add the connection in JobLink**

Field	Enter
Type	**SharePoint** or **OneDrive for Business** (same set-up)
Name / Root folder	e.g. *SharePoint* / *Odoo* (top folder inside the library)
Tenant ID · App (client) ID	From step 2
Client secret *or* Certificate (PEM)	From step 4
Site URL	https://<tenant>.sharepoint.com/sites/<site>
Document library	The library name (default *Documents*)
Role → group map	Each role and its group's Object ID

Press **Test**. It reports the site and library it found and fills in the Drive ID.

GOOGLE WORKSPACE

2.3 Google Drive

JobLink signs in as a **service account** that manages one **Shared Drive**. Job sub-folders are made **limited-access** so only their groups and crew can open them.

1 **Create the Shared Drive**
Google Drive → **Shared drives → New**, for example *JobLink Documents*. Keep members to admins only. Open it and copy the **Shared Drive ID** from the address bar (*drive.google.com/drive/folders/***<ID>**).

2 **Create a Google Cloud project and turn on the Drive API**
console.cloud.google.com → new project (for example *joblink-documents*) → **APIs & Services → Library → Google Drive API → Enable**.

3 **Create the service account and its key**
IAM & Admin → Service accounts → Create. No project roles are needed. Open it → **Keys → Add key → Create new key → JSON**. Keep the file safe; you'll upload it to JobLink.

If key creation is blocked, your organisation policy *Disable service account key creation* is on. A Google Workspace super admin can allow it for this project only.

4 **Add the service account to the Shared Drive as Manager**
In the Shared Drive → **Manage members** → add the service account's email (*...@...iam.gserviceaccount.com*) as **Manager**. Untick *Notify people*.

5 **Create a Google group per role**
Admin console → **Directory → Groups**, for example *joblink-pm@yourdomain*. Add members. Check sharing settings allow sharing Shared Drive items with these groups.

6 **Add the connection in JobLink**

Field	Enter
Type / Name / Root folder	**Google Drive** / e.g. *Google Drive* / *Odoo*
Service account key	Upload the JSON file from step 3
Shared Drive ID	From step 1
Role → group map	Each role and its Google group email

Press **Test**.

NAS

2.4 Connecting a NAS

JobLink writes into a NAS share that's mounted on the JobLink server. Any NAS that offers **SMB 3** or **NFS v3/v4** works. On **Synology DSM 7**, JobLink also sets folder permissions for you. On other brands, IT sets permissions on the NAS.

Profile in JobLink	Folder permissions	Notes
Synology (DSM 7)	Automatic, per folder	Needs a DSM account in the *administrators* group.
QNAP (QTS / QuTS hero)	Set by IT	Use SMB 3. Set share and top-folder permissions in Control Panel.
UGREEN (UGOS Pro)	Set by IT	Use SMB. Set permissions on the shared folder.
ASUSTOR (ADM)	Set by IT	Use SMB 3 or NFS. Access Control → Shared Folders.
TerraMaster (TOS)	Set by IT	Use SMB 3 or NFS. Shared folder privileges.
Other (SMB / NFS)	Set by IT	Any NAS or file server offering SMB 3 or NFS.

1 **Create the share and groups on the NAS**
Create a shared folder (for example *Jobs*), one group per JobLink role, and a **service user** (for example *joblink*) with read/write on the share. Turn on **snapshots** for the share if the NAS supports them.

2 **Mount the share on the JobLink server**
On a Mac server: Finder → **Go → Connect to Server** → *smb://<nas>/Jobs*, sign in as the service user and tick *Remember this password in my keychain*. Add it to **Login Items** so it mounts after a restart. It appears as */Volumes/Jobs*.

Hosted JobLink: your JobLink provider mounts the share for you. Send them the share path and the service user.

3 **Make the share visible to JobLink**
From the JobLink install folder, check first (dry run), then apply:

```
NAS_COPY_DIR=/Volumes/Jobs bash setup-nas-copy.sh          # checks and shows the change
NAS_COPY_DIR=/Volumes/Jobs bash setup-nas-copy.sh --apply   # writes it
docker compose up -d odoo
```

Inside JobLink the share is then **/mnt/nas**.

4 **Synology only: the DSM account**
Create a DSM user (for example *joblink-acl*) in the **administrators** group, with 2-step verification off for this account only, so JobLink can set folder permissions. Note the DSM address, for example *https://nas.local:5001*.

5 **Add the connection in JobLink**

Field	Enter
Type / NAS profile	**NAS** / your brand from the table above
Name / Root folder	e.g. *Office NAS* / *Odoo*
Mount path in Odoo	*/mnt/nas* (default)
Synology only	DSM address, DSM account, DSM password, Share name
Role → group map	Each role and its NAS group name

Press **Test**. It writes and removes a small test file and reports the free space. Other brands show *Permissions: set on the NAS by IT*.

ALL CONNECTIONS

2.5 Role → group map

On each connection, add one line per JobLink User Role that should see files there:

Connection type	Remote group is …	Example
SharePoint / OneDrive	the Entra security group's **Object ID**	3f2a…-…-9c1e
Google Drive	the Google group's **email**	joblink-pm@yourdomain.com
NAS (Synology)	the DSM **group name**	JobLink-PM

- Roles not in the map get no access in that place.
- **People not found** on the connection lists crew members whose JobLink email has no matching Microsoft or Google account. Fix their email in JobLink or their account, and they're added on the next run.
- JobLink doesn't create groups or add people to them. Group membership stays with IT (or your SSO).

2.6 First send

1. **Test**
   Press **Test** on the connection and fix anything it reports.
2. **Turn it on**
   Tick **Active**. Leave *Also copy native drawing files* off unless you have the space and want the CAD files there.
3. **Send all**
   Press **Send all**. Existing files are queued and copied in the background, 50 per connection every 10 minutes, so a large library can take a while.
4. **Check**
   Open a few documents → **Copies** tab, and look at the folder in SharePoint, Google Drive or the NAS. Sign in as a test user in one role to confirm they see only their folders.

2.7 Turning on the archive (optional)

- Settings → Documents → **Move older files**: choose the **Archive connection** and the days (see 1.5). Leave it empty to keep every file on the server.
- Moves run each night, a limited amount per night, and only after the archive copy is checked.
- Make sure version history or snapshots are on for the archive **before** turning this on.
- To change the archive later, use **Move back all** on the old connection first.

2.8 Fixing problems

You see	Likely cause	What to do
Test: access denied (Microsoft)	No admin consent, or the site grant isn't FullControl.	Redo steps 3 and 5 of 2.2.
Test: invalid client secret	Secret expired or copied wrong.	Make a new secret and enter it.
Test: Shared Drive not found (Google)	Wrong ID, or service account isn't a Manager.	Check steps 1 and 4 of 2.3.
Test: NAS not mounted	Share dropped off the server.	Re-mount; check Login Items.
Many items **Error**	Credentials changed, storage full, or a file name the service refuses.	Open one to read the reason, fix, then **Retry** (or Send all).
Items stay **Queued**	The service is busy (throttling) or offline.	Nothing to do; JobLink retries up to 5 times with a pause, then shows Error.
A person can't see a folder	Not in the group, role not mapped, or email mismatch.	Check the role → group map, group membership and **People not found**.
"This file has been moved … can't be reached"	The archive is offline.	Bring the archive back online; the file opens again. Nothing is lost.

2.9 Good to know

- Access given by JobLink is **read-only**. Staff change files in JobLink, then the copy updates.
- File names with / \ : * ? " < > | are cleaned to -, and long names are shortened, to suit each service.
- A deleted document's copy goes to *<root> / _Deleted / <date>*. Clear that folder yourself when you're ready.
- Rotate the Microsoft client secret before it expires, and keep the Google JSON key file somewhere safe (or delete your local copy after uploading).
- Removing a connection stops copying; files already copied stay where they are.