



00

Before you start

Contents, index, roles, permissions and how a report moves.

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Assurement
LITE EDITION

User manual

Go screen by screen, in the order you work. Every page shows the real screen with arrows to what you click, and the numbered steps next to it tell you what to do.

R1

Company admin

Sets up the company, creates sites, invites people and pays for reports.

Chapters 1 to 5, 10, 13, 14

R2

Project manager

Runs the site: uploads drawings, creates reports and sets up the tasks.

Chapters 6 to 9

R5

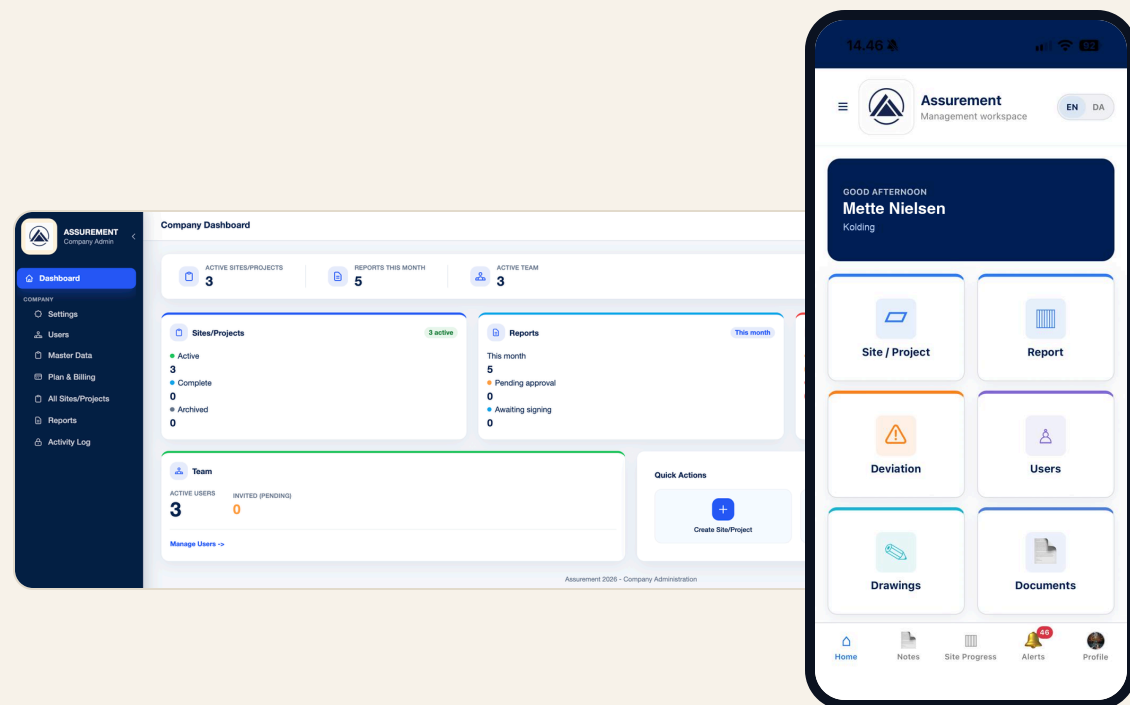
Field user

Does the tasks on site with the phone app and adds photo evidence.

Chapter 11

Start the manual

Contents



Contents

Find the task you need, then go straight to its page. The numbers on the right are page numbers; 5.1, 5.2 are the section numbers you see on each page.

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Look up a word and go to the page number.

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How to read a page

Every page is one screen of Assurance and one thing to do on it.

Orange ring and arrow

Where to click or type. The number matches the numbered step on the left.

R1 Company admin

Who

The role that does this step. R1 company admin, R2 project manager, R5 field user.

Where

Where

How to get to the screen.

NEXT

Next

What happens after, so you always know the following screen.

MOVING AROUND

Use the arrow keys or the buttons at the bottom. The numbers at the top jump to a chapter. Point at a step to highlight its arrow.

NEXT

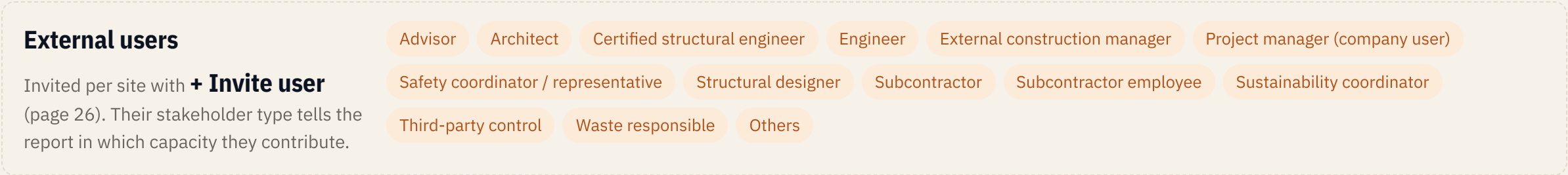
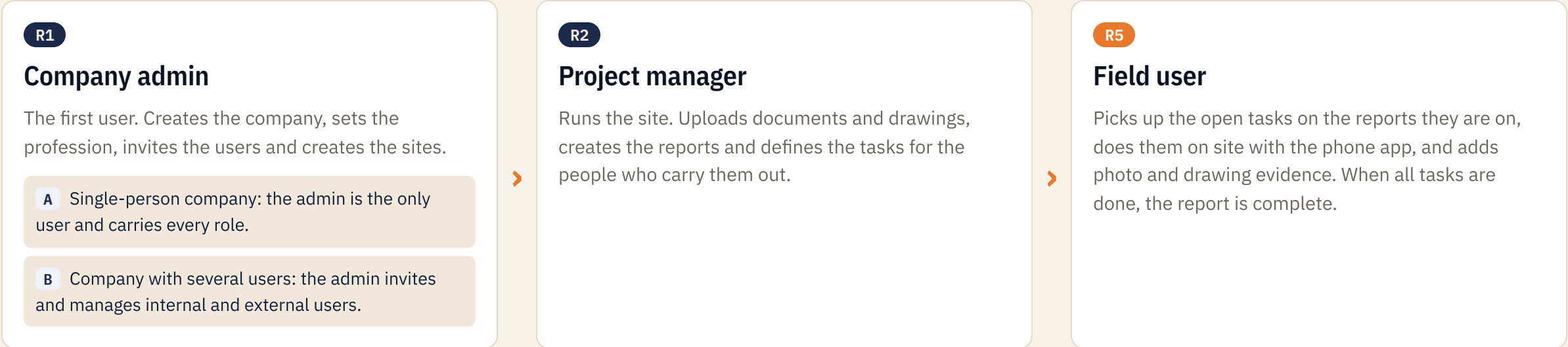
Who does what, the profession type and the setup checklist.



The screenshot shows the 'ASSUREMENT HQ' login page. At the top is the logo and the title 'ASSUREMENT HQ' with the subtitle 'Platform Administration'. Below this are two buttons: 'Login' (dark blue) and 'Sign up' (light blue). The main heading is 'Sign in to your account'. There are two input fields: 'Email address *' and 'Password'. The 'Email address' field has an orange ring and arrow on its right side, labeled '1 Email'. The 'Password' field has an eye icon on its right side. Below the password field is a link 'Forgot password?'. At the bottom is a large blue 'Sign in' button, which has an orange ring and arrow on its right side, labeled '2 Sign in'.

Who does what

Three internal roles hand the work on to each other. People outside the company join with a named external role.



What people can do

Assurement uses three permissions. You set them when you invite someone (pages 22 and 26). They work the same for internal and external users.

ALWAYS ON

Read

Everyone can view the site, the report and its documents. Read only, nothing can be changed.

OPTIONAL

Communicate

Write in the communication notes of the report: new notes and answers (chapter 12).

OPTIONAL

Register

Do tasks in the mobile app: start a task, register the result and add photo and drawing evidence (chapter 11).

Tasks are open to everyone

A task is not given to one person. When R2 clicks Assign task, every task on the report is open to everyone on it with Register.

The report completes itself

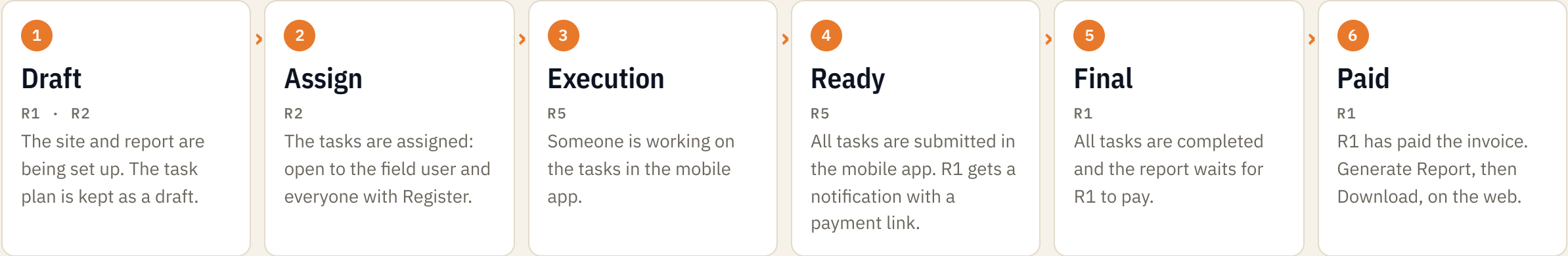
When all tasks are submitted in the app, the report is Ready and R1 gets the payment link. There is no review or signing step.

Late tasks become deviations

A task that is not done by its completion date moves to the Deviations tab automatically (page 42).

How a report moves

Every report passes through six statuses. You see them as counters on the site dashboard (page 30) and in the report repository.



After payment

Generate Report compiles everything into one PDF, however long it is. Then Download Report is enabled (page 61).

Lite limits

5 running sites or projects at the same time, and 2 running reports in each site.

Making room

When the 2 reports of a site are paid, you can start a 3rd report in that site, or create another site. Archiving is for sites, not reports: the company admin can archive a site.

Choose your profession type

The profession type decides which control plans and control points your company gets. Decide before you start, because the default profession is locked once it is saved.

DEFAULT PROFESSION

Construction companies

Pick your trade from the master data library, for example Blacksmith / Metal Worker.

USE GLOBAL

Control plans and control points maintained in Assurance, ready to use.

OR

USE YOUR OWN

Write custom control points in the report (page 49). Master data cannot be changed.

Set it up on page 19 ›

EXTRA PROFESSION

Everyone outside construction

Advisor, Realstate, Process engineers, Private or Others. You bring your own control points. The reporting flow and the roles are the same.

Set it up on page 20 ›

Setup checklist

The order that gets a new company from sign-up to its first finished report. Click a page number to go to the step.

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03	R1	Set the default or extra profession (locked once saved)	p. 19 >
05	New	Invited users accept the invitation and get the app	p. 27 >
07	R1	Invite external stakeholders with the right permissions	p. 26 >
09	R2	Give each drawing a floor level	p. 32 >
11	R2	Create the report: module, ID, title, description, drawings	p. 34 >
13	R2	Tick the task types and choose the profession source	p. 39 >
15	R5	Do the tasks on site and add photo and drawing evidence	p. 51 >
02	R1	Choose company access: single person or company	p. 18 >
04	R1	Invite your project managers (R2) and field users (R5)	p. 22 >
06	R1	Create the site or project and add its participants	p. 23 >
08	R2	Upload the documents and drawings for the site	p. 31 >
10	R2	Choose the professions for the site	p. 33 >
12	R2	Add the people who will do the tasks to the report	p. 36 >
14	R2	Fill in the task forms, then click Assign task to release them	p. 43 >
16	R1	Report Ready: pay from the notification link, then generate and download it	p. 56 >