



05

Create a site or project

The site wizard, licence, participants, invitations and the site list.

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5.1

Enter the site details

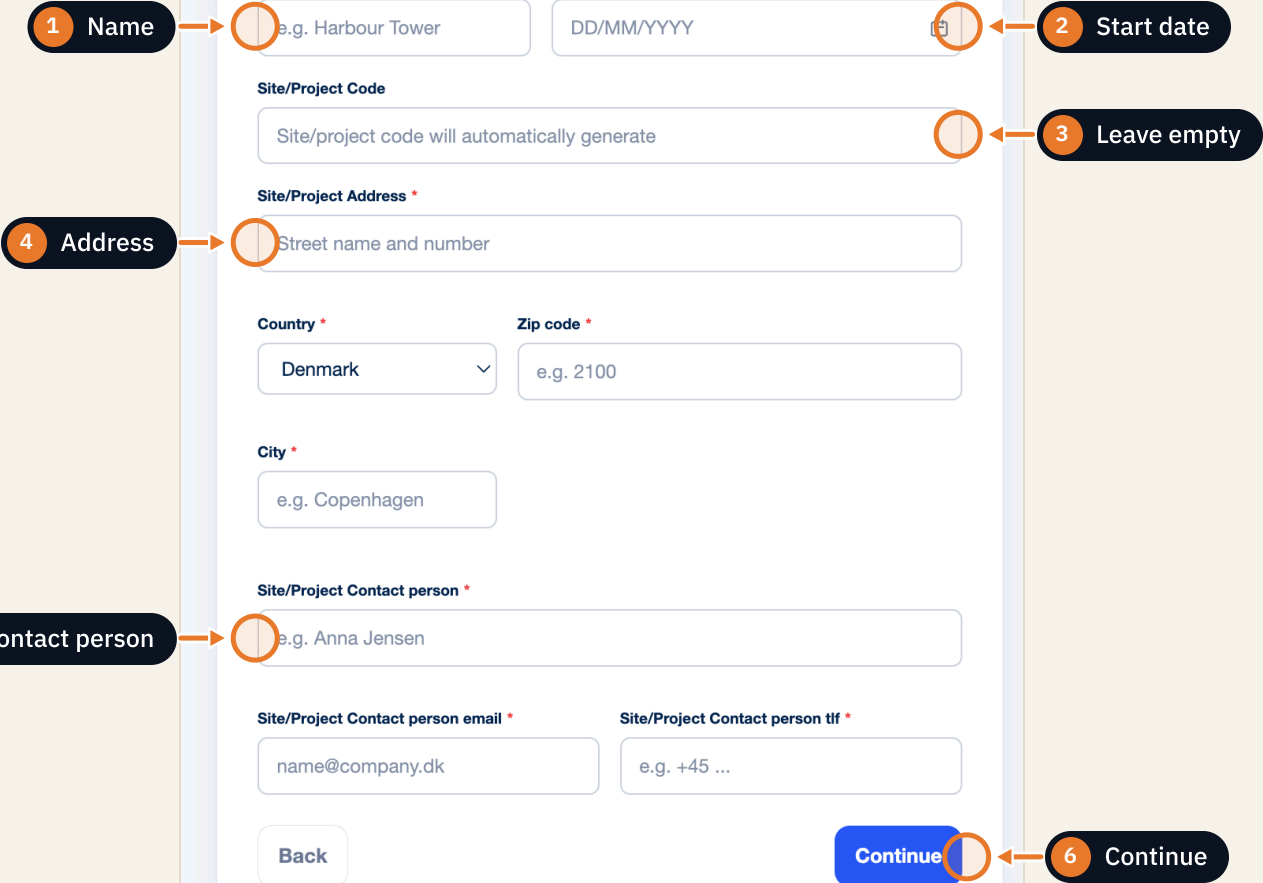
R1 Company admin

New Site/Project > Step 1 of 3

The first of three short steps. Fields with a red star are required.

- 1 **Site/Project Name**
For example Harbour Tower.
- 2 **Start date**
Pick it from the calendar.
- 3 **Code**
Leave it empty. Assurancement generates the code.
- 4 **Address**
Street, country, zip code and city.
- 5 **Contact person**
Name, email and phone of the person on site.
- 6 **Click Continue**
Go to step 2.

NEXT
Step 2: confirm the licence. →



Confirm the licence

R1 Company admin

New Site/Project > Step 2 of 3

Lite allows 5 running sites or projects at the same time. Each new site uses one of them.

- 1

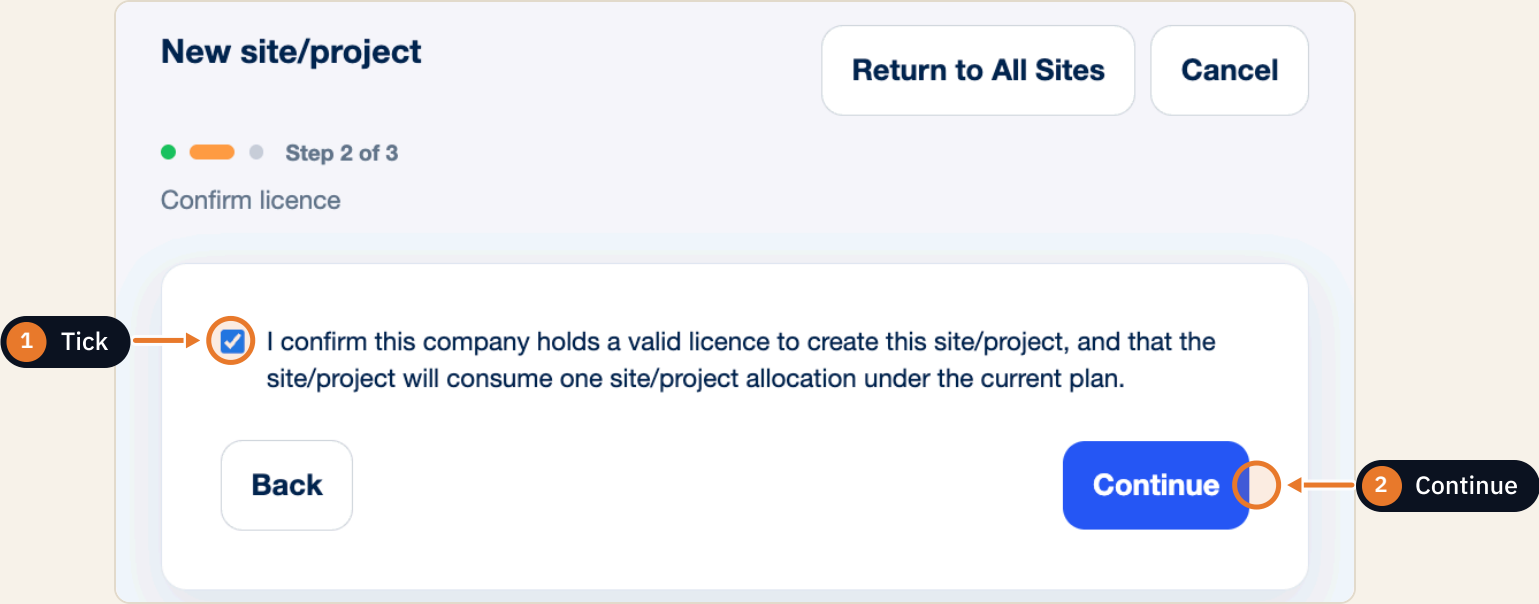
Tick the confirmation
You confirm the company holds a valid licence for this site.
- 2

Click Continue
Go to step 3.

GOOD TO KNOW

Each site can have 2 reports running. When both are paid, you can start a 3rd report in that site, or create another site.

NEXT
Step 3: add the people.



Add the people

R1 Company admin New Site/Project > Step 3 of 3

Pick colleagues from your company. Their role on the site follows their account.

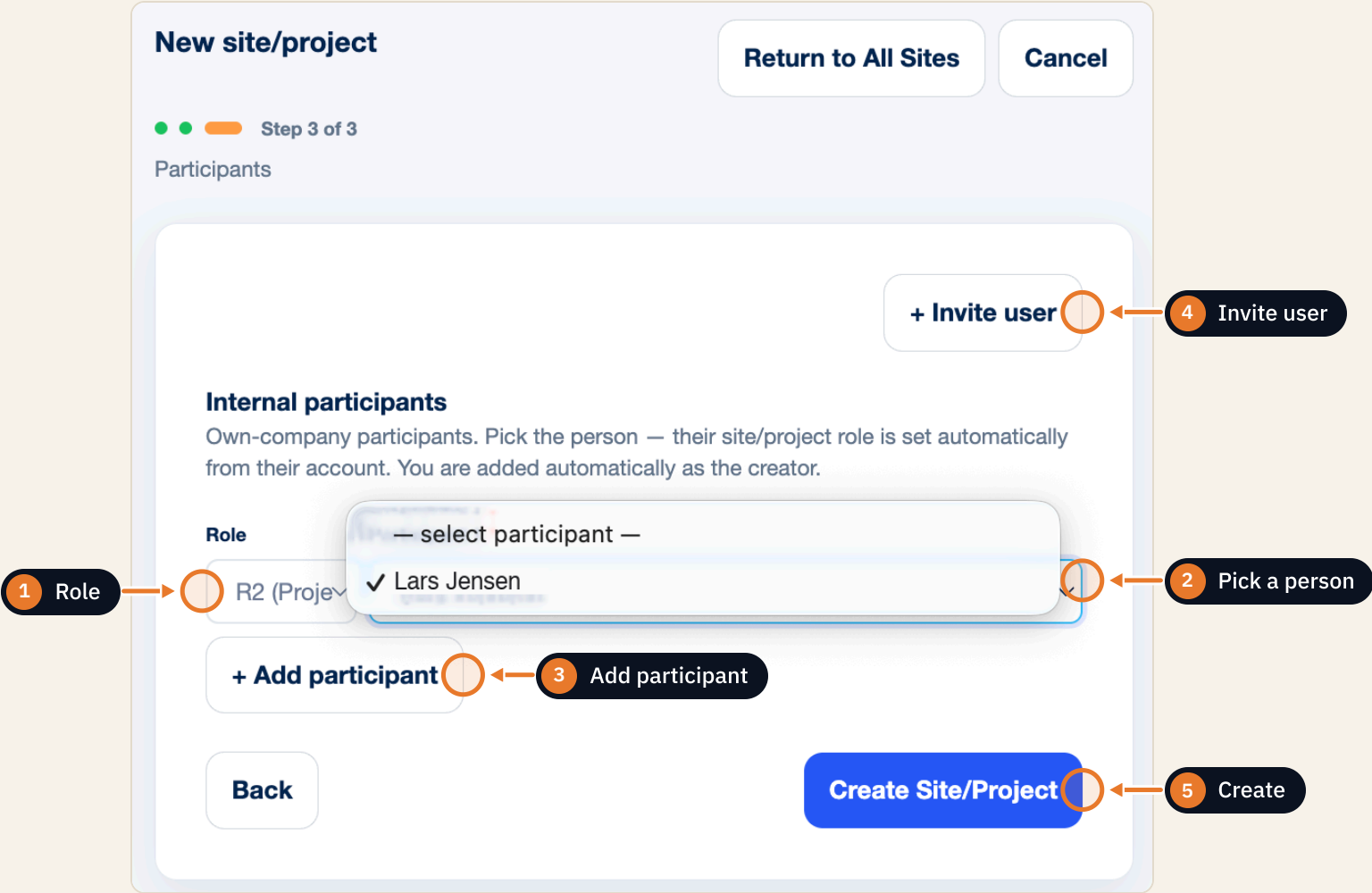
- 1 **Role**
For example R2, the project manager.
- 2 **Pick the person**
Choose from the list, for example Lars Jensen.
- 3 **Add participant**
Add another row for the next person.
- 4 **Invite user**
Someone not in the list yet? Invite them. See the next page.
- 5 **Click Create Site/Project**
The site is created.

GOOD TO KNOW

You are added automatically as the creator. Add the project manager (R2) and the field users (R5) who will work on this site.

NEXT

Inviting someone? Next page. Otherwise skip to page 29. →



Invite a user

R1 Company admin Step 3 > + Invite user

Invite stakeholders from outside the company, or colleagues who have no account yet.

- 1 **Invite type**
External for people outside the company. Internal for colleagues.
- 2 **Stakeholder type**
Their named external role, for example C22 Advisor. See the list on the Who does what page.
- 3 **Permissions**
Read is always on: view only. Communicate: write in the communication notes. Register: do tasks in the mobile app.
- 4 **First name, last name, email**
The invitation goes to this email.
- 5 **Click Send Invitation**
The invitation goes to the email address.

GOOD TO KNOW

The invitation is valid for 24 hours.

NEXT
See what the invited person receives. →

Participants

Invite User

Invite type

☒ External

☐ Internal

1 External or Internal

External type

☒ Stakeholder

☐ User (Temporarily unavailable)

Stakeholder type *

C22 - Advisor

2 Stakeholder type

Access permissions

☒ Read
Can read assigned stakeholder data.

☒ Register
Can access the mobile app and complete assigned tasks.

☒ Communicate
Can add communication notes.

3 Permissions

First name *

Last name *

Email *

4 Name and email

Invitation valid for 24 hours

Cancel

5 Send Invitation

The invitation email

- New
- Invited user
- The invited person's inbox

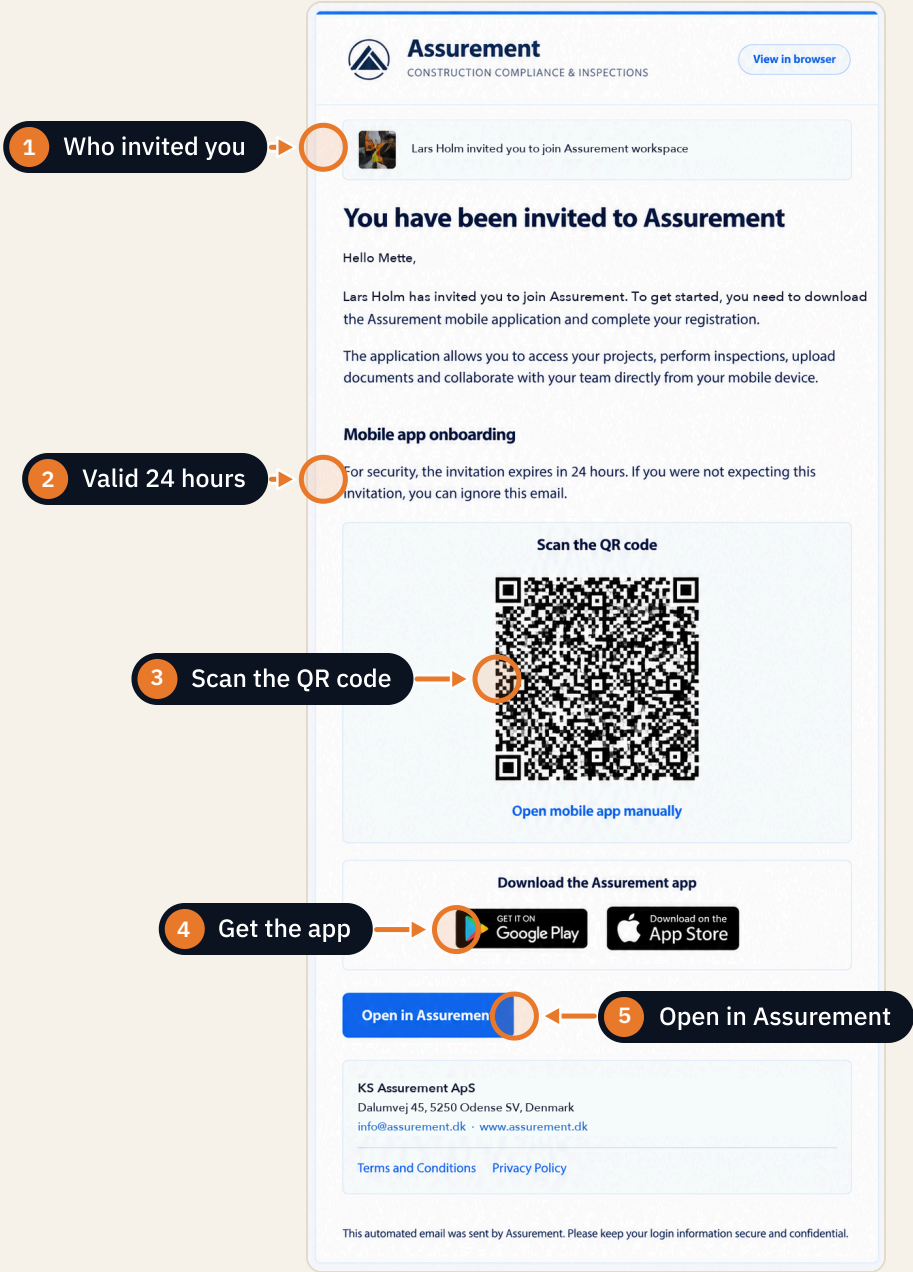
This is what the invited person receives. Share this page with new users so they know what to do.

- 1 Who invited you
- The person and the company workspace you are joining.
- 2 Act within 24 hours
- The invitation expires after that. Ask for a new one if it does.
- 3 Scan the QR code
- With your phone, to open the Assurancement app.
- 4 Download the app
- From Google Play or the App Store.
- 5 Open in Assurancement
- Opens the invitation so you can activate your account.

NEXT

Fill in the Accept your invitation form.

→



Accept the invitation

New Invited user Invitation > Accept your invitation

The invited person sets a password and completes their profile to activate the account.

- 1

First and last name

Phone is optional.
- 2

Password

Type it twice.
- 3

Password requirements

At least 12 characters, upper and lowercase letters, a number and a special character.
- 4

Education / Certification

Add a description for each row. Documents are optional.
Add Row adds another.
- 5

Experience

Same as education: a description per row, documents optional.
- 6

Click Activate account

The account is ready. Log in as on page 12. The login in the mobile app looks and works the same.

NEXT

Back to the company admin: find the site.

→

3 Requirements

4 Education

5 Experience

Accept your invitation

Set your password and complete your profile to activate your account. (AEB A/S)

First name *

Last name *

Phone (optional) *

+45

Select a country, then enter the number

Password

Confirm password

PASSWORD REQUIREMENTS

☐ At least 12 characters

☐ Upper and lowercase letters

☐ Contain at least one number

☐ Contain at least one special character (!@#%\$)

☐ Passwords match

Profile photo (optional)

Upload photo

JPG, JPEG, or PNG. Large photos are accepted.

Education / Certification

Description Required · Documents Optional

NO.

EDUCATION / CERTIFICATION *

DOCUMENTS

ACTION

Required

Choose file

No file chosen

Remove

Experience

Description Required · Documents Optional

NO.

EXPERIENCE *

DOCUMENTS

ACTION

Required

Choose file

No file chosen

Remove

First name, last name, Phone (optional), Password, Education / Certification description, Experience description

Activate account

1 Name

2 Password

5

Find your site

R1 Company admin

Company menu > All Sites/Projects

Every site and project of the company, with status, reports and participants.

1 Filter

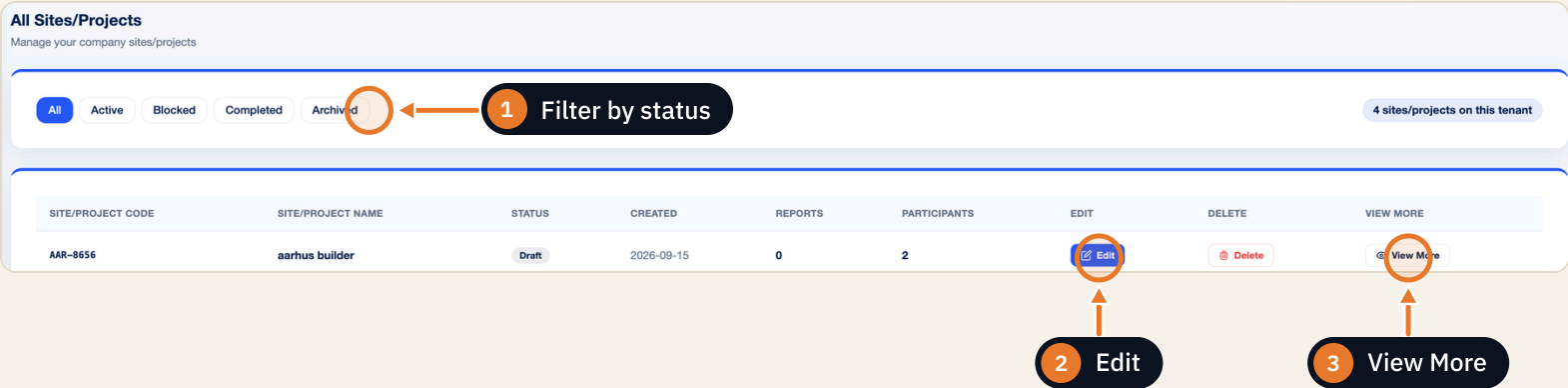
All, Active, Blocked, Completed or Archived.
Archived sites are sites the company admin has archived.

2 Edit

Change the site details.

3 View More

Opens the site dashboard. This is where the project manager takes over.



NEXT
Chapter 6: the site dashboard. →