



06

Site dashboard, documents and drawings

Upload documents and drawings, floor levels and professions for the site.

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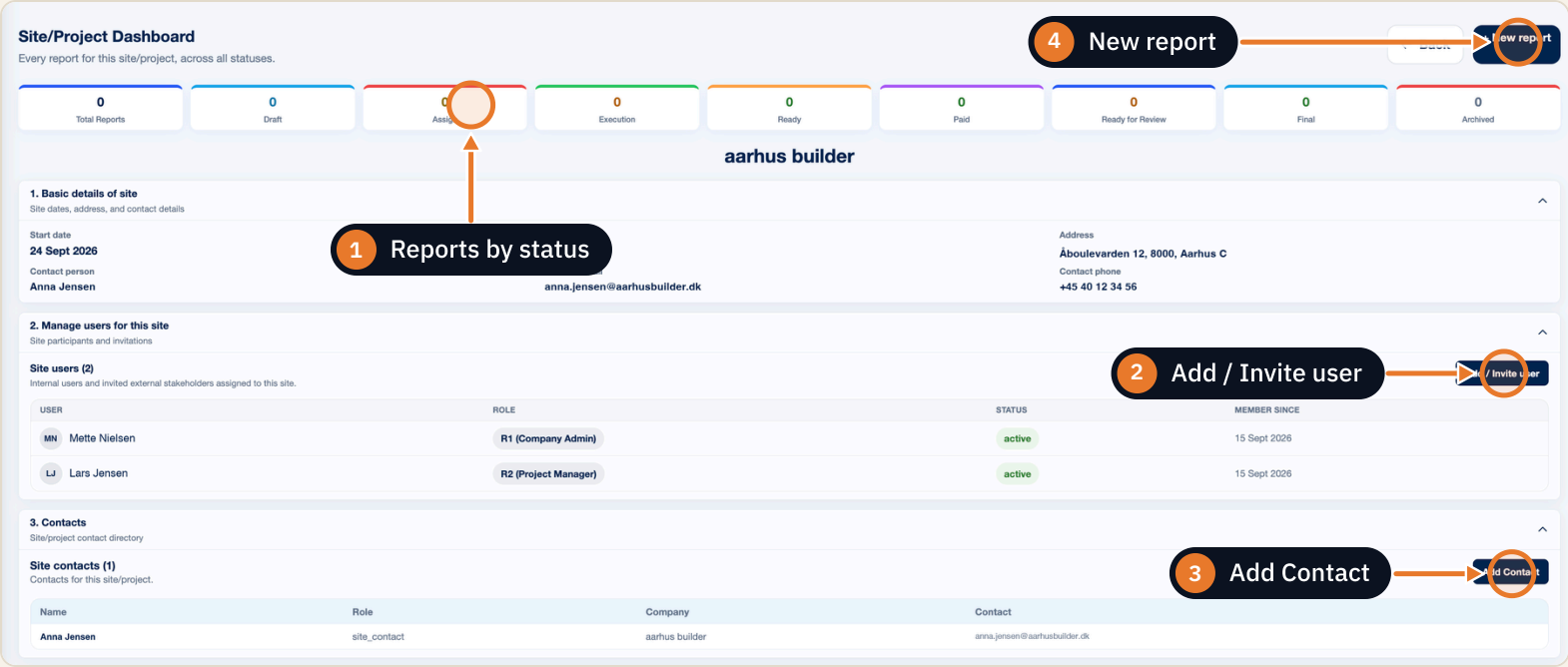
Know the site dashboard

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All Sites/Projects > View More

One page for everything about one site: its reports, details, users and contacts.

- 1 Report counters
- How many reports are in each status. See the page How a report moves at the start of the manual.
- 2 Add / Invite user
- Add more people to this site.
- 3 Add Contact
- Keep the site contact list up to date.
- 4 New report
- Starts a report. Do this after pages 31 to 33.



NEXT
Upload the documents and drawings. →

Upload documents and drawings

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Site dashboard > 4. Document upload / 5. Drawings upload

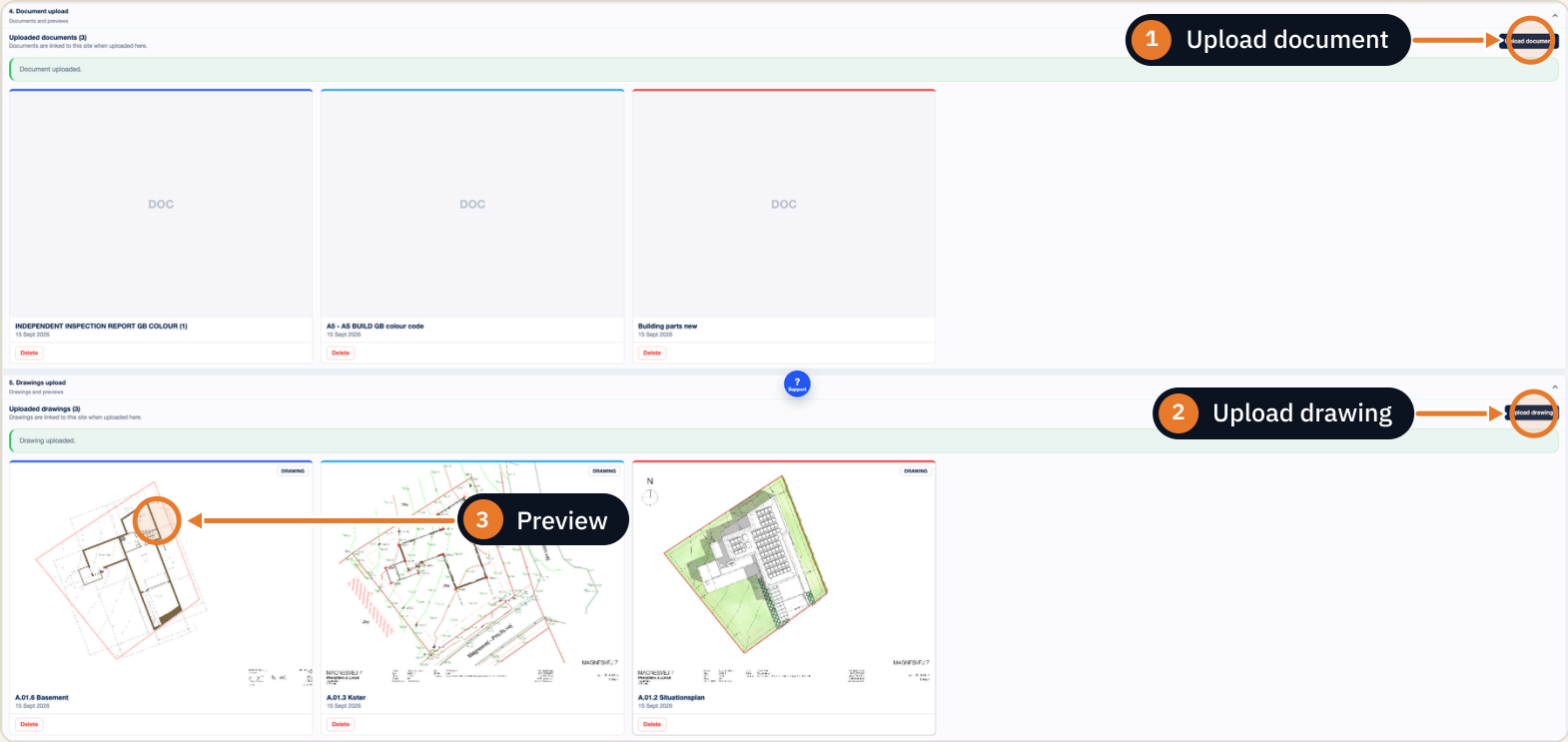
Upload once, and every report on this site can use the files.

- 1 Upload document
Inspection reports, colour codes, building part lists.
- 2 Upload drawing
Plans and sections for the site.
- 3 Check the preview
Each file shows as a card. Delete removes it.

GOOD TO KNOW

Upload drawings here first. The report wizard picks its drawings from this list.

NEXT
Give each drawing a floor level. →



Give each drawing a floor level

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Site > Drawings

Drawings are grouped by floor level. Every drawing must be assigned to a floor level.

1 Upload drawing

Add a new drawing to the site.

2 Level

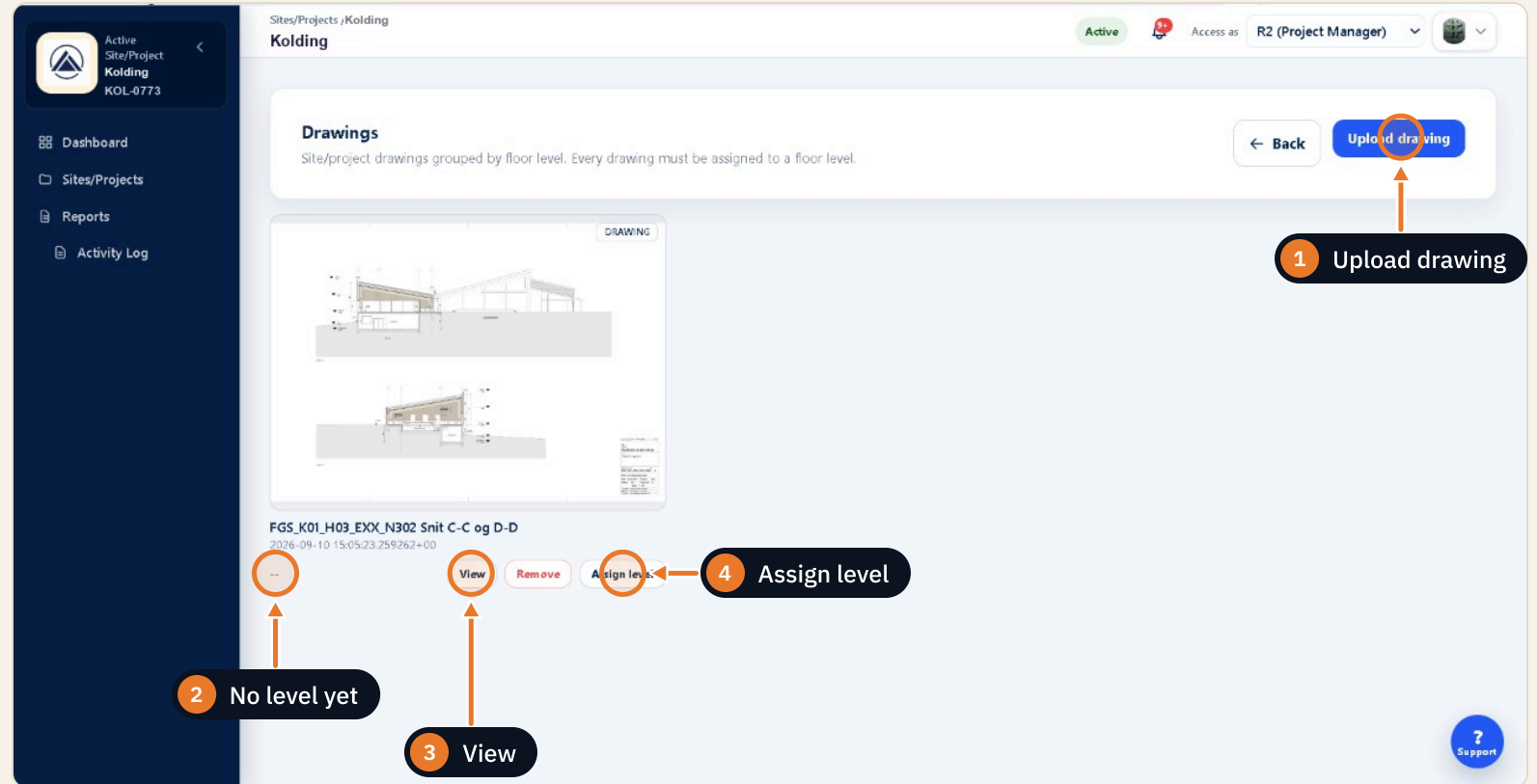
Shows -- until the drawing has a floor level.

3 View

Open the drawing. Remove deletes it.

4 Click Assign level

Choose the floor level the drawing belongs to.



NEXT

Choose the professions for the site.



Choose the professions

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Site dashboard > 6. Profession selection

The company default profession is already selected.
Add more if other trades work on the site.

- 1

Profession source
Default Profession or Extra Profession, as set in Company settings.
- 2

Tick more professions
The default stays selected.
- 3

Click Save professions
Discard undoes your changes.
- 4

Check what is loaded
For example 3 plans, 1 building part and 37 control points.
- 5

Latest reports
Search the reports of this site.

NEXT

Scroll up and click New report. Chapter 7.

→

