



07

Create a report

The six-step report wizard.

7.1	Choose module and report ID	p. 34
7.2	Give the report a title	p. 35
7.3	Add the report participants	p. 36
7.4	Describe the report	p. 37
7.5	Pick the drawings	p. 38
7.6	Tick the task types	p. 39
7.7	Choose the profession source	p. 40

7.1

Choose module and report ID

R2 Project manager

Site dashboard > New report > Step 1 of 6

A guided wizard in six steps. The dots at the top show where you are. A site can have 2 reports running at the same time.

1 Choose module
Select Lite Report.

2 Report ID
Type an ID that is unique in your company.

3 Click Continue
Go to step 2.

Create Report

Return to all reports

Step 1 of 6

Choose module *

Select the module you want to create.

Lite Report

1 Lite Report

Report ID *

Enter report ID

2 Report ID

Enter a unique report ID for this company.

Continue

3 Continue

NEXT
Step 2: the title. →

Give the report a title

R2 Project manager New report > Step 2 of 6

The title is what the team sees in lists and on the phone.

- 1 **Report ID**
It follows along at the top of every step.
- 2 **Report title**
For example Functional test, basement.
- 3 **Click Continue**
Go to step 3.

Create Report

Return to all reports

Step 2 of 6

Report ID AAR-RAP-001

1 Your report ID

Report title *

Enter the title that should be saved for this report.

Back

Continue

3 Continue

2 Title

NEXT
Step 3: add the people to the report. →

Assurement Lite · User manual Chapter 7 · Create a report

PAGE 35

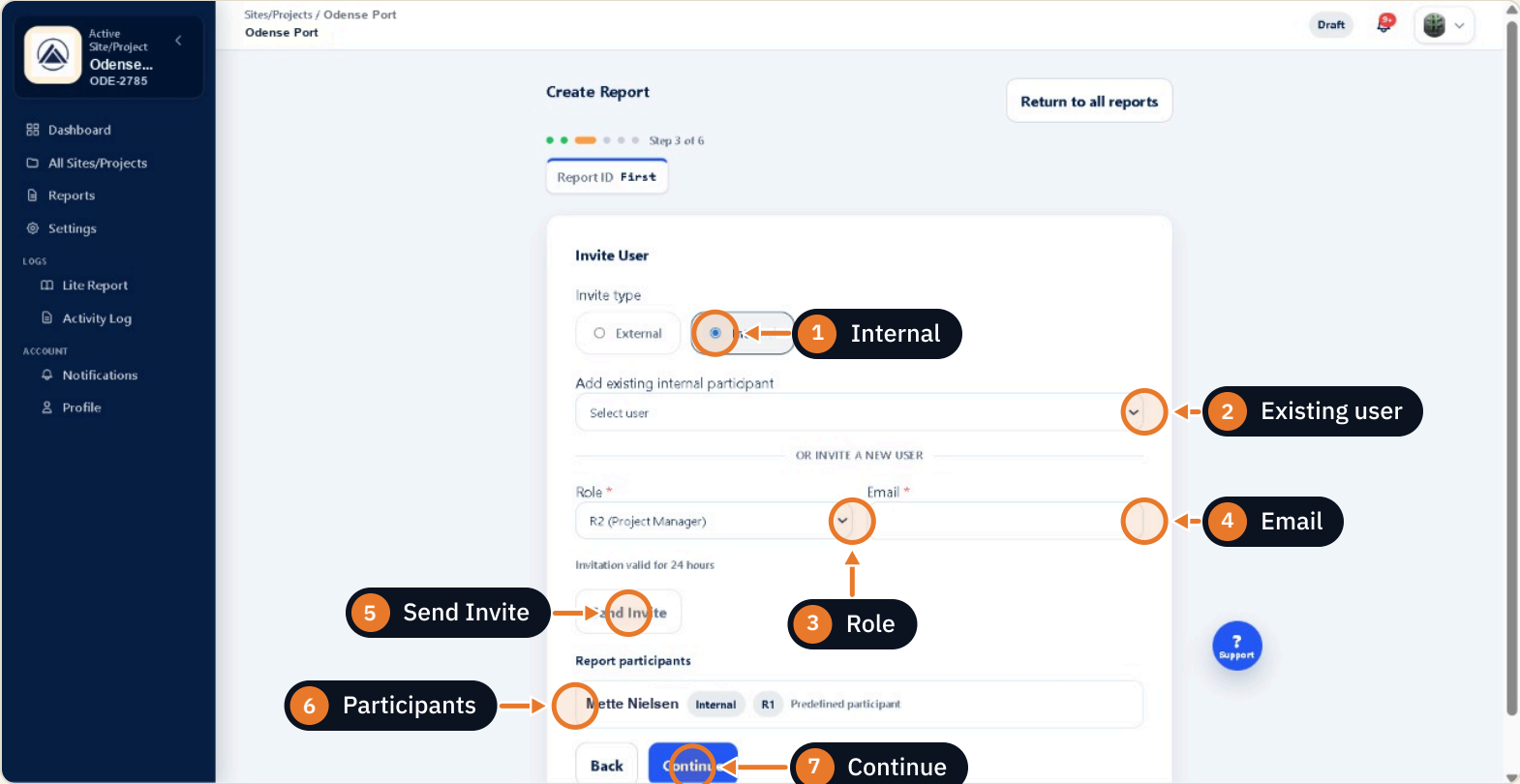
Add the report participants

R2 Project manager New report > Step 3 of 6

Choose who works on this report. Tasks are open to everyone on the report with the Register permission, so add all the people who may carry them out.

- 1 **Invite type**
Internal for colleagues. External for stakeholders.
- 2 **Add an existing participant**
Pick a colleague who already has an account.
- 3 **Or invite a new user: role**
For example R2 Project Manager, or the field user role.
- 4 **Email**
Where the invitation goes.
- 5 **Click Send Invite**
Valid for 24 hours. The new user follows pages 27 and 28.
- 6 **Report participants**
Everyone on the report. You are listed as a predefined participant.
- 7 **Click Continue**
Go to step 4.

NEXT
Step 4: the description. →



Describe the report

R2

Project manager

New report > Step 4 of 6

Tell the field team what the report covers before they start.

- 1

Report description

What is checked, where, and why.
- 2

Watch the word count

Up to 1000 words.
- 3

Click Continue

Go to step 5.

Create Report

Return to all reports

● ● ● ● ● ●

Step 4 of 6

Report ID AAR-RAP-001

Report Description *

Add the report description. The description can be up to 1000 words.

0 / 1000 words

Back

Continue

1 Description

2 Word count

3 Continue

NEXT

Step 5: pick the drawings.

→

Pick the drawings

R2 Project manager New report > Step 5 of 6

Choose from the drawings you uploaded on the site dashboard.

- 1 **Tick one or more drawings**
For example A.01.3 Koter.
- 2 **Missing one?**
Click + Add drawing, then Refresh.
- 3 **Click Continue**
Go to the last step.

NEXT
Step 6: choose the tasks. →

Create Report

Return to all reports

● ● ● ● ● Step 5 of 6

Report ID AAR-RAP-001

Select drawings *

Choose one or more drawings already uploaded to this site. This report will use those drawings without uploading a new document or drawing from the wizard.

2 Add drawing

+ Add drawing Refresh

Site drawings

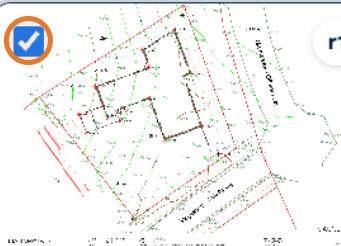
1 Tick

☐



A.01.6 Basement
Not specified / 2026-09-15

☒



A.01.3 Koter
Not specified / 2026-09-15

☐



A.01.2 Situationsplan
Not specified / 2026-09-15

Back

Continue

3 Continue

Assurement Lite · User manual Chapter 7 · Create a report

PAGE 38

Tick the task types

R2

Project manager

New report > Step 6 of 6

Tick the kinds of task this report needs. Each one becomes work for the field user.

- 1

Tick the task types
Checklist type 1 or 2, Registration type 1 or 2.
All are optional.
- 2

Create Report
Click it after you have chosen the profession
source on the next page.

NEXT

Choose where the control points come from. →

Create Report

Return to all reports

Step 6 of 6

Report ID

AAR-RAP-001

Task creation

Select any tasks you want to create with this report.

1

Tick task types

☒ Checklist type 1 (optional)

☐ Checklist type 2 (optional)

☐ Registration type 1 (optional)

☐ Registration type 2 (optional)

Back

Create Report

2

Create Report

Choose the profession source

R2 Project manager New report > Step 6 of 6

As soon as you tick a task type, Assurance asks where the control points should come from.

1 Ticked task types

The source question appears below them.

2 Choose the source

Global: the master data library from Assurance. Company: your company's control points. Extra: your extra profession. You can always add custom control points later (page 49).

GOOD TO KNOW

Then scroll down and click Create Report.

NEXT
Chapter 8: the report overview. →

Create Report

Return to all reports

Step 6 of 6

Report ID

AAR-RAP-002

Task creation

Select any tasks you want to create with this report.

1 Ticked types

☒ Checklist type 1 (optional)

☒ Checklist type 2 (optional)

☒ Registration type 1 (optional)

☒ Registration type 2 (optional)

2 Source

Which profession source do you want? *

☒ Global

☐ Company

☐ Extra

7

PAGE 40