

Documentation



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Introduction

SiteWorks is an application for iPad, iPhone, iPod Touch, intended for operational construction site monitoring.

It allows you to organize your construction sites, drawings, stakeholders, and observations in a simple and efficient way, to quickly share status reports in PDF, Excel, and CSV formats with your contacts, and to save or exchange your construction site files between multiple iPads, iPhones, iPod Touch.

This document describes in detail the use of the application's features, from data import to the generation of progress reports, including the configuration of the application.

License and terms of sale and use

SiteWorks is sold as a license for use without a time limit and allows you to use it on any version of iOS compatible at the time of purchase.

SiteWorks license is sold according to the standard terms of sale and use of the AppStore.

One license per user for use on their personal devices, and 1 license for each device shared by multiple users.

The standard terms of sale and use of the AppStore are available at the following address:

<https://www.apple.com/legal/internet-services/itunes/>

Stakeholders management

Description

SiteWorks is integrated with the address book of your iPad, iPhone, iPod Touch («Contacts» App). If you add or modify a stakeholder from the application, they will be added or updated with the integrated contacts app of the iPad/iPhone.

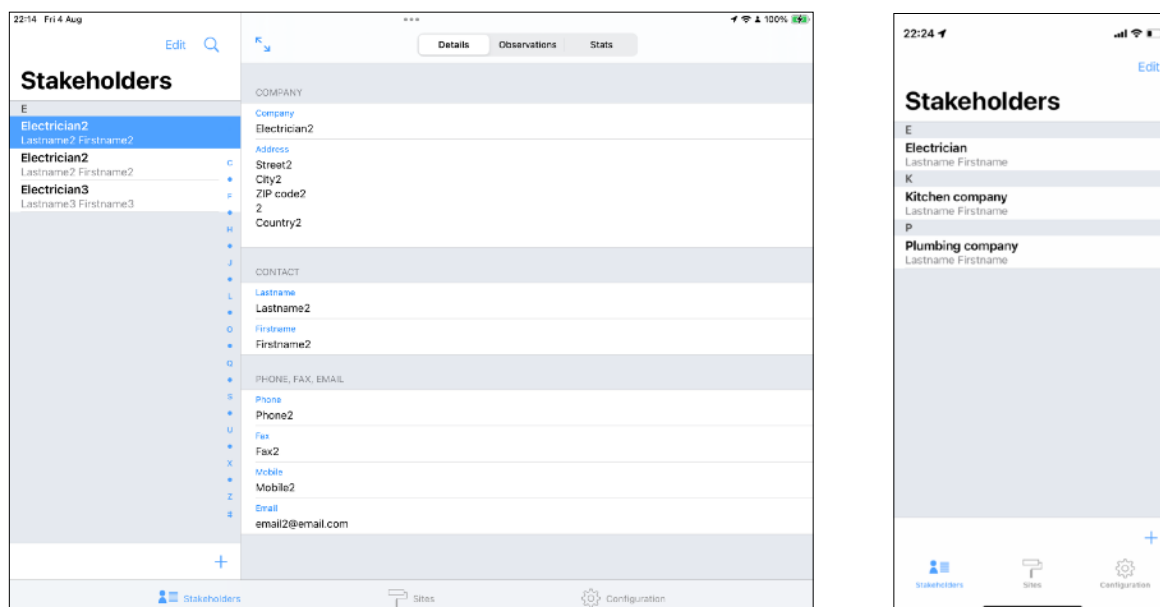
Within the application, a stakeholder is a company, a contact in relation with one or more construction sites. In most cases, these stakeholders will be the companies responsible for the work on your construction sites.

Stakeholders are managed from the "Stakeholders" tab accessible from the bottom of the application window.

On iPad

The left part of this screen presents the list of all stakeholders you've added to the app, sorted alphabetically (Company Name, Lastname, Firstname)

The right hand part let you visualise the details of the selected contact.



On iPhone, iPod Touch

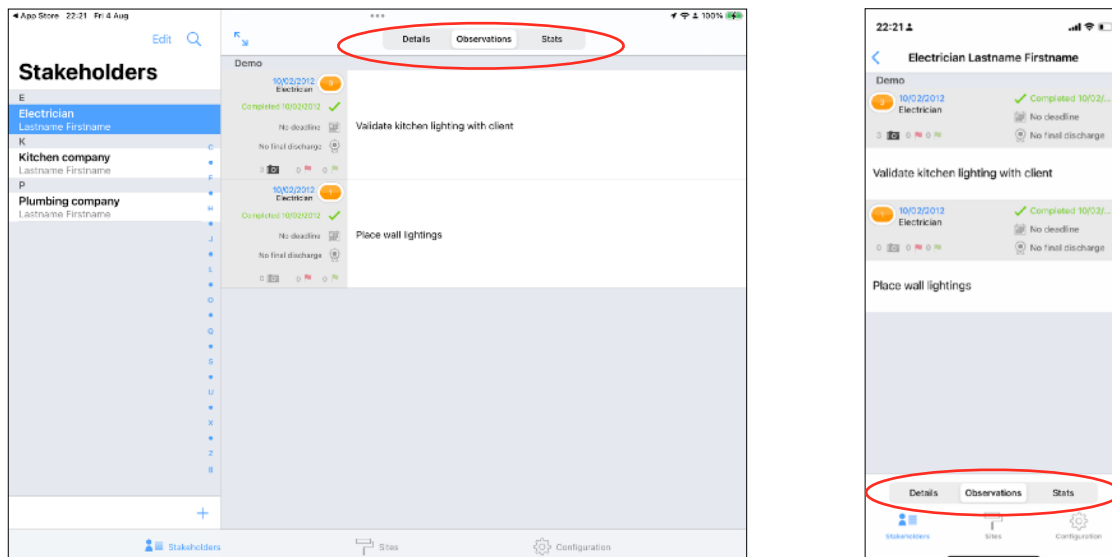
«Stakeholders» tab displays the list of all stakeholders you've added to the app, sorted alphabetically (Company Name, Lastname, Firstname)

Details about a stakeholder are shown as a stakeholder is selected.

«Details» segment gives you access to contacts info's such as phone numbers, email, address, etc.

« Observations » segment gives you access to observations attributed to the selected stakeholder.

« Stats » segment gives you access to the selected stakeholder observations statistics.



Import a stakeholder from the address book (Contacts App)



In order to import a contact into SiteWorks, touch the + button at the bottom of the stakeholders list, then touch the «Import» button in the popover appearing on screen.

A popover containing a list of your contacts will appear, select the one you want to import and it will be added to the application.

Add a stakeholder

If you want to add a stakeholder that is not present in the Contacts app, touch the + button at the bottom of the stakeholders list, then touch the «Add» button in the popover appearing on screen.

Fill in the stakeholder form and press «save» button.

The stakeholder is now added to the app and present in your iPad, iPhone, iPod Touch 's address book and accessible from all of your applications.

Modify a stakeholder


To modify a stakeholder, touch the « Edit » button at the top right of the stakeholders list, select the stakeholder you want to modify and touch the pencil (edit) button at the bottom left of the stakeholders list.

The edition form appears on screen, modify it and press «Save» button.

If you modify an contact from SiteWorks, changes will be synchronized with the Contacts app automatically.

Merge two stakeholders

If a stakeholder has been added multiple times inside the app and each record is linked to several observations, you are able to merge those duplications.

To merge two contacts referring to the same stakeholder, touch the « Edit » button at the top right of the stakeholders list, select the two stakeholders to merge and touch the « merge » icon  at the bottom left of the stakeholders list.

Select the record to keep (the other contact will be removed from the app and the observations that were attached to it will be attributed to the kept contact) and touch the « Merge » button.



Delete a stakeholder

In order to delete a stakeholder, touch the «Edit» button at the top right of the stakeholders list, select le stakeholder to delete and press the trash button bat the bottom right of the stakeholders list.

Confirm deletion or cancel by pressing Delete or Cancel button on the alert box shown on screen.

When you remove a stakeholder, it will not remove the associated contact from the device's Contacts app.

It's siteworks id (see below) will also remain to avoid contact duplication if a further siteworks file import, containing this contact, occurs.

SiteWorks ID

When you create or import a stakeholder, a unique id is associated with each contact **(except if you sync your contacts with Outlook or an Exchange server)**.

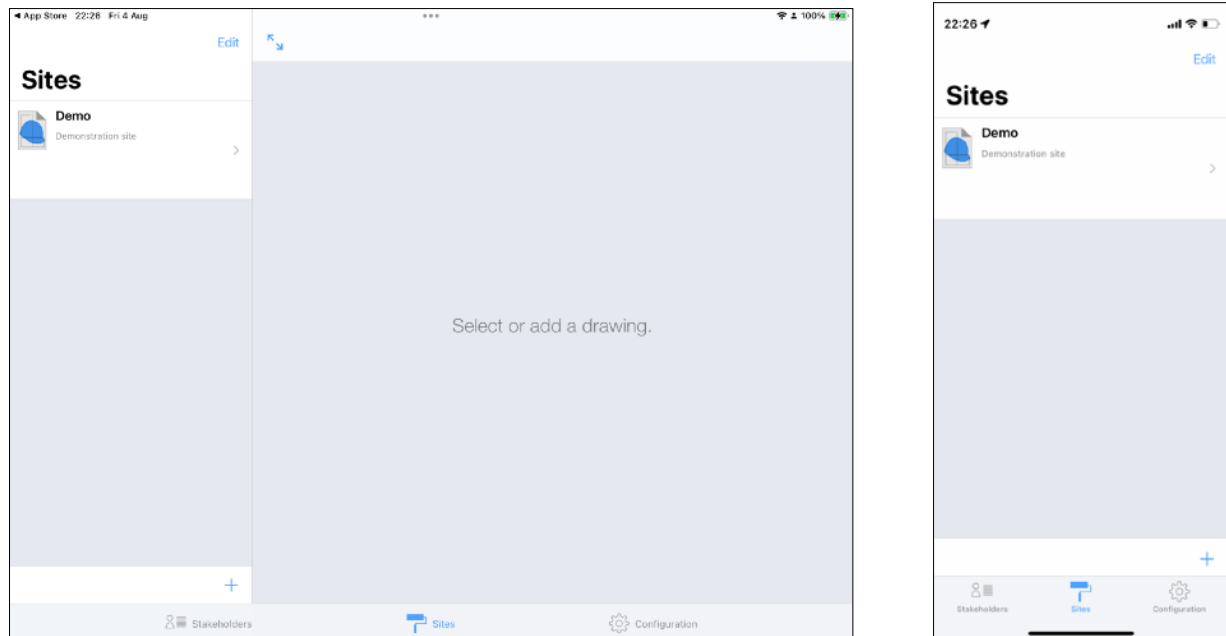
It appears in the siteworks field inside the «Contacts» app.

You should not remove or alter this field which allows the application to link a stakeholder inside SiteWorks app to a contact in the device Contacts app avoiding any contact duplication during siteworks files sharing and import.

Sites management

Description

Sites and their related data (drawings, observations, etc) are managed from the «Sites» tab at the bottom of the screen.



Site creation

Before importing your drawings into the app, you need to create a site.

To create a site, touch the + button at the bottom of the sites list.
Select «Add» in the popover appearing on screen.

Fill in the new site form (you can edit it at any moment) and touch the «Save» button.

Your new site is now visible in the sites list, you can access its sub data touching its name

Each site contains a «drawing library» that will contain all the original pdf drawings you will import and a «stage» folder in which you will be able to create an unlimited number of subfolders to organize your drawings and observations as you wish to (by date, follow-up category, area, etc).

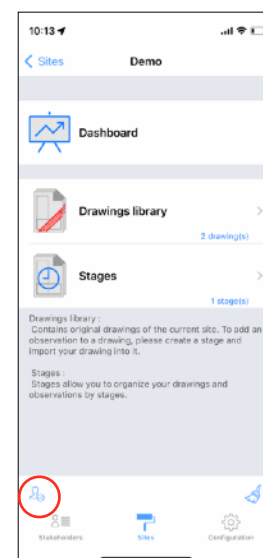
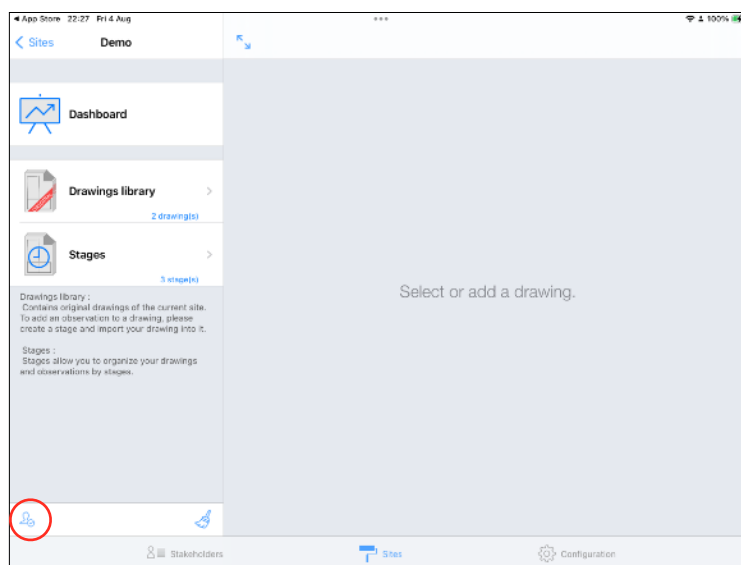
Define site specific stakeholders and building trades list

SiteWorks contains by default a set of default building trades.

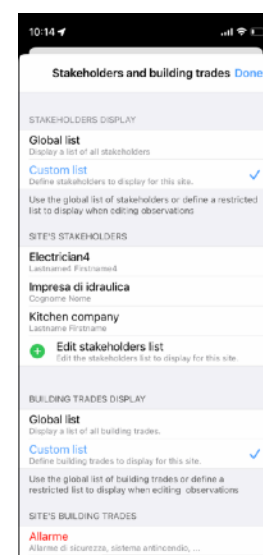
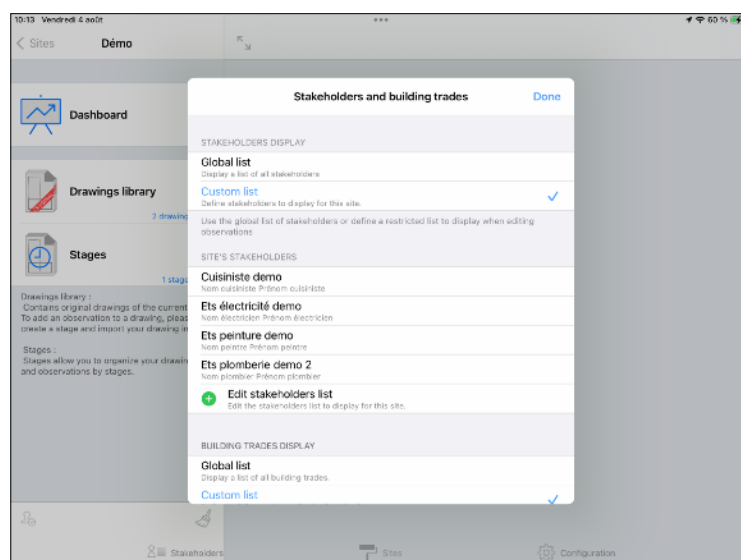
SiteWorks displays a global list of stakeholders and building trades by default when editing observations in a site.

If you manage a large amount of stakeholders and/or building trades, the app lets you define site specific list of stakeholders and building trades in order to display only the ones you need when editing observations of a site.

To define site specific stakeholders and building trades lists, go to the root of your site and touch the « Person » icon.



In the editing window appearing, in the stakeholder section, select « Custom list » to use a specific list of stakeholders for this site.



To add or remove stakeholders to the custom list of this site, touch the « Edit Stakeholders list » button.

Select the site specific stakeholders and save the edits.

Proceed same way in the « Building Trade » section to define a site specific list of building trades to use.

Import drawings into the app

You have multiple ways to import your original drawings into the application:

- from the Files app and iCloud
- From any 3rd party cloud service offering an app integrating with the files app (DropBox, Box, OneDrive, GoogleDrive,...)
- From iTunes (Windows) / Finder (Mac)
- from Mail
- from a WebDAV server

**To integrate your cloud services into the Files application on iOS/iPadOS and access them from SiteWorks, please refer to the following guide from Apple's support site:
<https://support.apple.com/en-us/HT213096>*

SiteWorks uses PDF format drawings but offers you the ability to import images from your photo albums, from the camera or any sources listed above and convert them to PDF format.

For best performance and pixel free drawings no matter the zoom scale, we encourage you to use vector PDF Files.

If you import a multi-page PDF file, the app will automatically split the pages into multiple drawings records.

To make the most of the application, we recommend that you divide your plans into areas of a size equivalent to A4 format before importing them in order to improve the performance of the application and to benefit from better readability of the reserves in the PDF reports.

Transfer drawings to SiteWorks from the Finder (Mac Catalina or above)

Please refer to the following guide and upload your items to the SiteWorks application from the Finder:

<https://support.apple.com/en-us/HT210598>

Transfer drawings to SiteWorks from iTunes (Mac avant Catalina)

Please refer to the following guide and upload your items to the SiteWorks application from iTunes:

<https://support.apple.com/en-us/HT201301>

Transfer drawings to SiteWorks from iTunes (Windows)

Please refer to the following guide and upload your items to the SiteWorks application from iTunes on Windows:

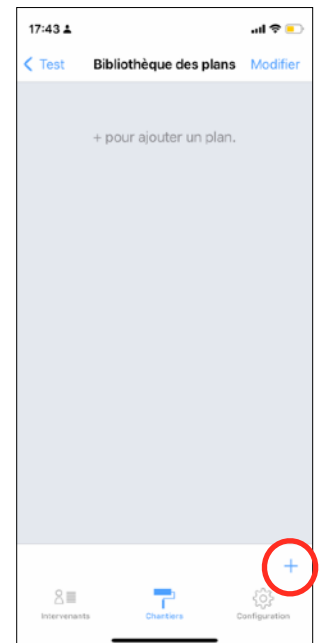
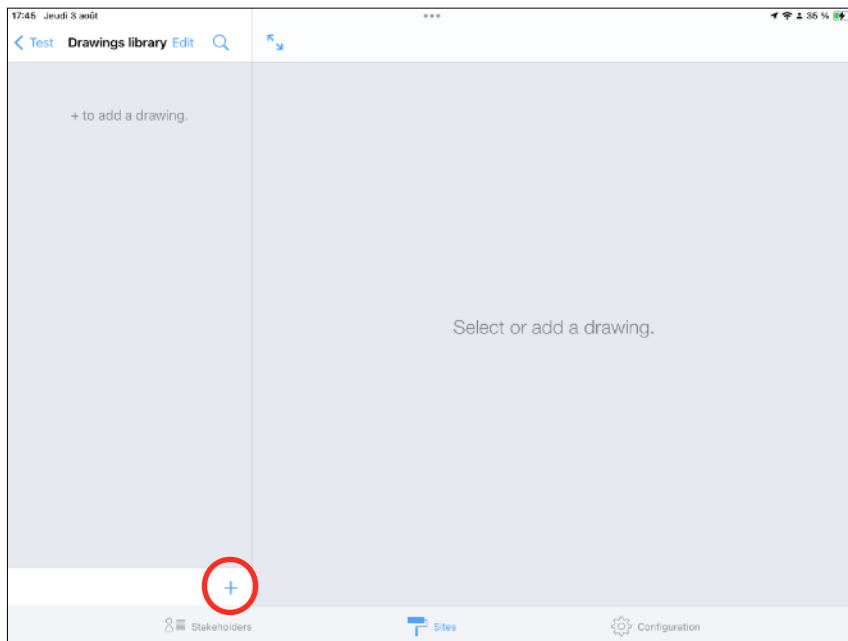
<https://support.apple.com/guide/itunes/itns32636/windows>

Import drawings transferred from iTunes / Finder into your site

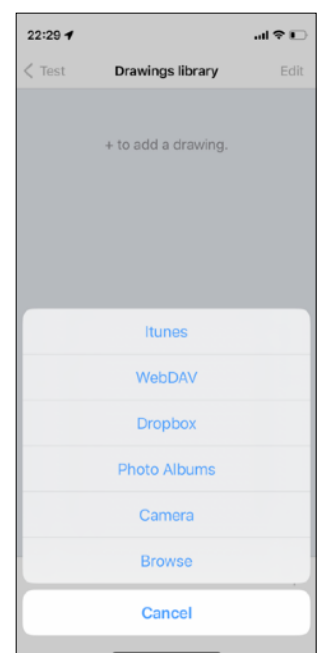
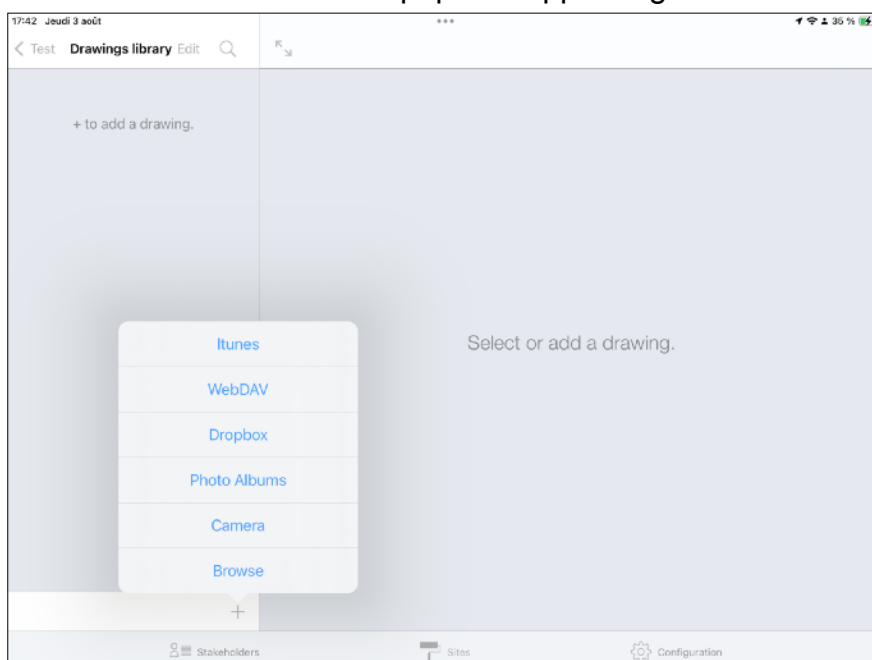
Once your drawings have been imported into iTunes and synchronized to your iPad, iPhone, iPod Touch, start SiteWorks.

Go to the «Site» tab and select the site you want to import drawings into.

Go into «Drawings library» and touch the + button at the bottom of the original drawings list.



Press «iTunes» button in the popover appearing on screen



Select the drawings you want to import and press «Save» button.

Your drawings now appear in the original drawings list.

Import from the Files App from iOS 11 and above (iCloud / DropBox, Box, One Drive, Google Drive, ...)

From iOS 11 and above, the recommended method for integrating your cloud file services is the integration of third-party services of the Files app, available on any iOS device running on a version equal to or greater than iOS 11.

Follow the procedure described at the following address to integrate your third-party cloud services into the Files app:

<https://support.apple.com/en-us/HT213096>

Once configured, follow the instructions below:

- Go to the site where you want to import your original plans, enter your plan library by touching the "Plan Library" button.
- Touch the + button located at the bottom of the list of original plans and then touch the "Browse" button.

A window of the Files app appears and you can navigate and select your plans from iCloud, your iPad, or any third-party service that you have configured following the procedure described on the Apple support site.

Navigate to the folder containing your original drawings in pdf, jpg, or png format and select those you want to import by touching their name (a selected file appears with a check to the left of its name, to deselect it, press its name a second time).

Once all your plans are selected, touch the "Open" button and the download of your files will begin.

As soon as the files are downloaded, they will appear in the list of original plans in your plan library.

Note: If you import images (Jpeg, JPG, PNG) instead of PDF files, they will be converted into non-vector PDF files.

Import from Dropbox menu option (iOS 11 and below)

If your device is running on an iOS version above iOS 11, the method detailed before is recommended.

For more information about Dropbox, visit <http://www.dropbox.com/>.

In order to access your Dropbox, you'll have to link your account inside «Configuration» tab.

Once SiteWorks is linked to your Dropbox account, you will be able to browse your folders and download your pdf original drawings right into your drawings library.

Go into the site inside which you want to import your original drawings and go into the «Drawings library».

Press the + button at the bottom of the original drawings list and press the «Dropbox» button.

The app will connect to the root folder of your Dropbox.

Browse to the folder containing your original pdf drawings and select it by touching their names in the list.

Once all your files are selected, press the save button to start downloading the drawings into the «Drawings library».

Once the download is completed, your drawings will appear in the original drawings list.

Note: If you import images (Jpeg, JPG, PNG) instead of PDF files, they will be converted to non-vector PDF files.

Import from WebDAV server

In order to access a WebDAV server, you'll have to configure your server from the «Configuration» tab.

Press the + button at the bottom of the original drawings list and press the «WebDAV» button.

The procedure is then the same as Dropbox import described above.

Import from an album or from camera

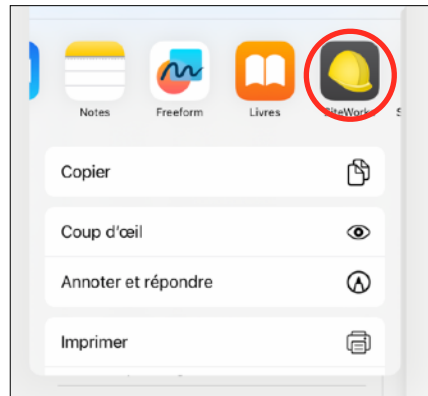
To import a photo from an album contained inside your device or from the camera, touch «Photo Album» or «Camera» button and select or take a picture.

This photo will be imported and converted to PDF format and added to your drawings library.

Import from Mail app

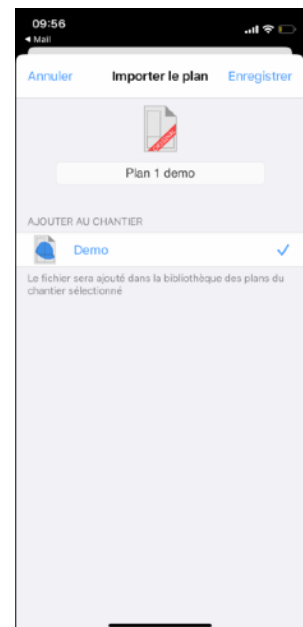
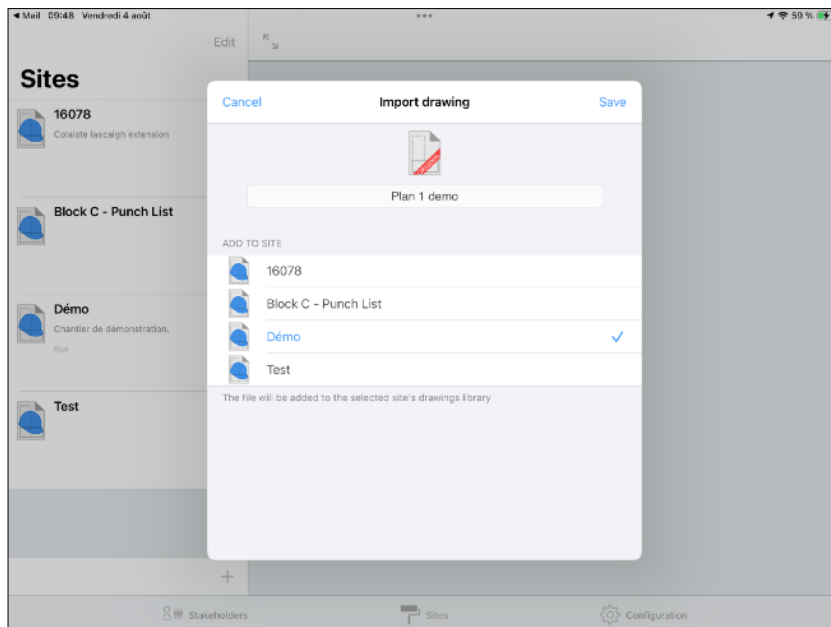
You can import an original drawing from the Mail app.

Start Mail and open the email containing your attached pdf drawing.
Do a long press touch on your drawing and touch the «Share» button. Select SiteWorks in the popover appearing on screen.



SiteWorks will launch and show the import drawing popover.

Eventually rename the drawing, select the site into which you want to import the drawing and press «Save» button.



Open the site into which you imported your drawing, it will be available for use in its «Drawings library».

Site stage creation

Site stages let you organize your sites observations logically.

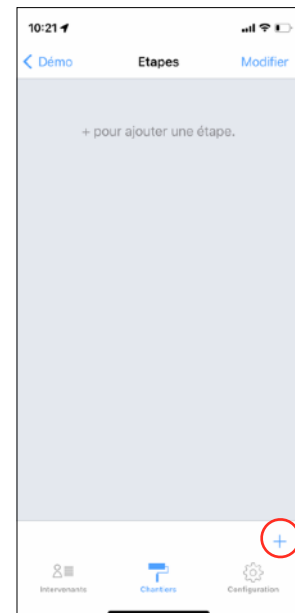
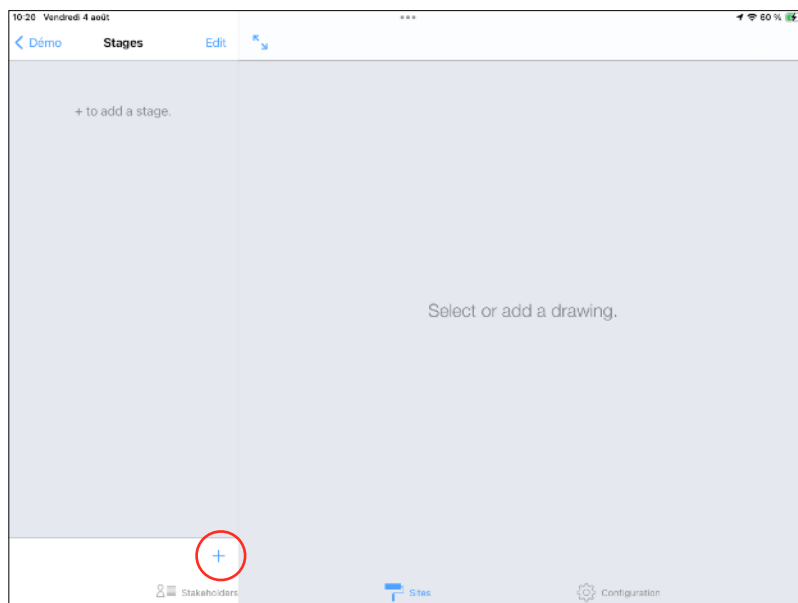
Exemple of stages set up:

- «Preparation» stage to handle site preparation drawings and observations.
- «Supervision» stage to follow siteworks progress.
- «Handover» stage to handle site handover.

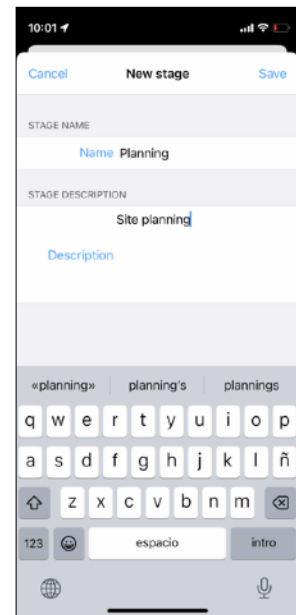
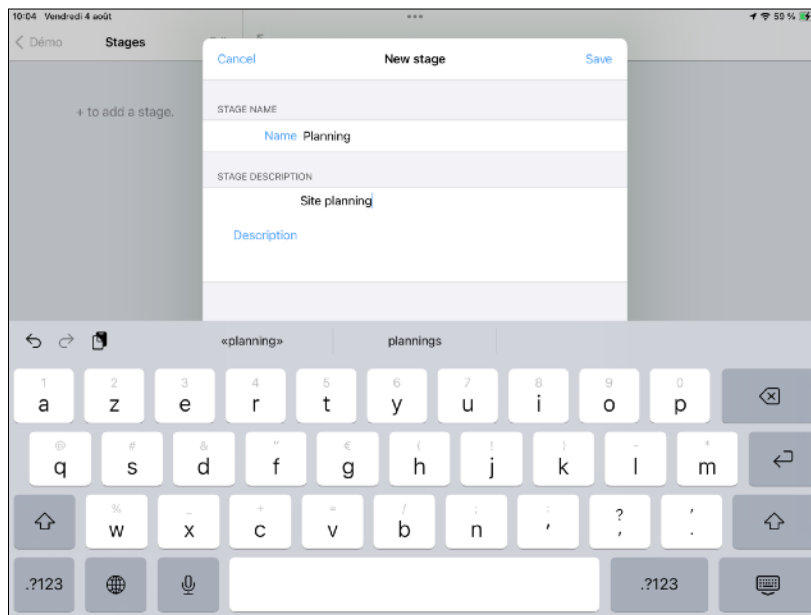
Create a stage

Create a site, import your original drawings, select the site (see above) and press the «Stages» button.

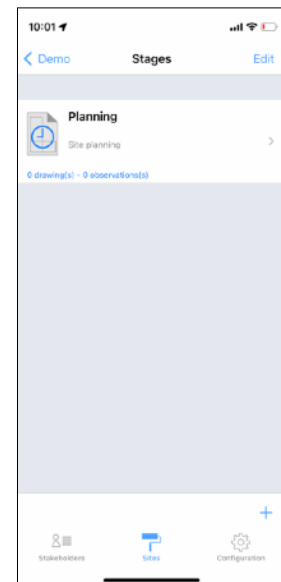
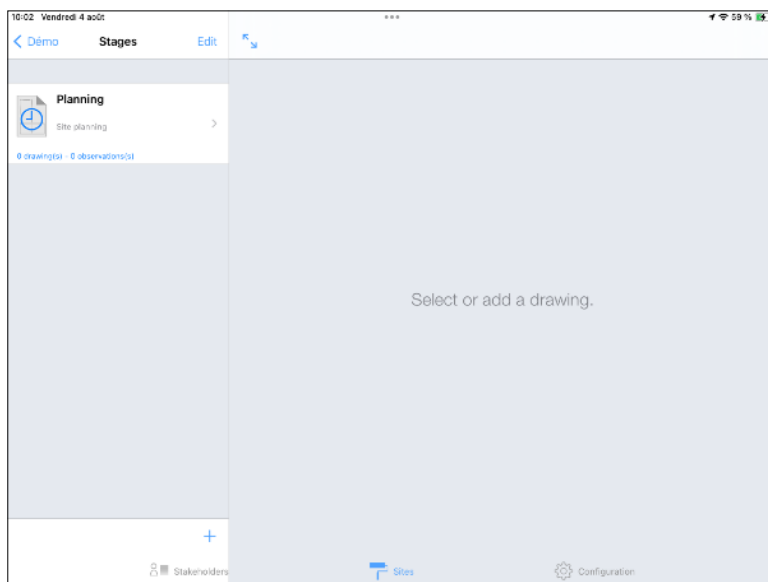
In order to add a stage, press the + button at the bottom of the stages list.



Give the stage a name and description and press the «Save» button.



The stage now appears in the stages list, select it in order to add drawings where you want to place observations.



Move drawings and observations from a previous building stage

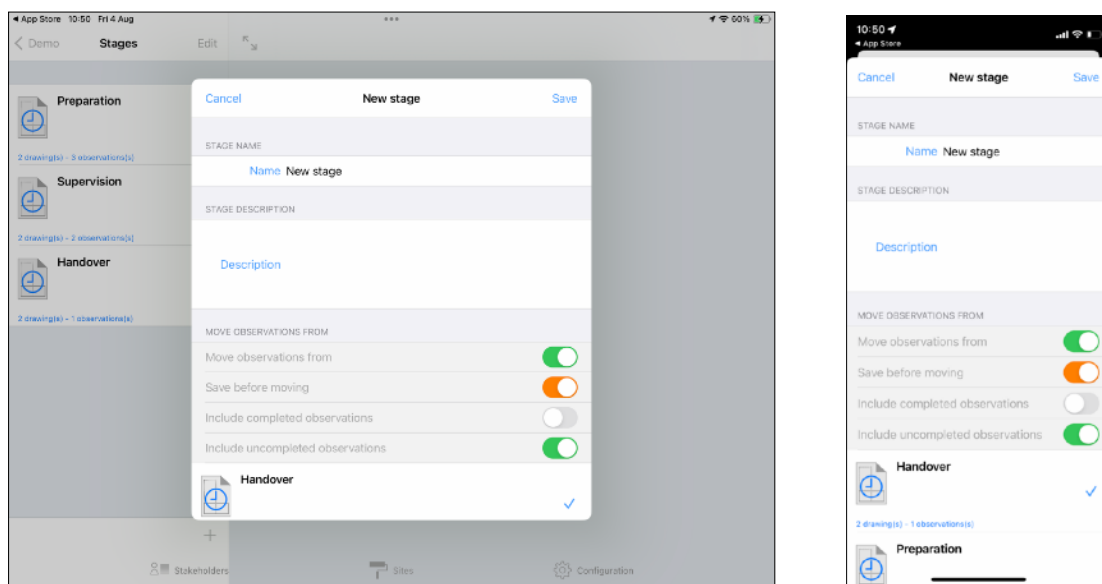
When adding a new building stage, you can move drawings and observations present in one or multiple previously created building stages, in order to continue their follow up.

Create a new building stage as described above and switch on « Move observations from » at the bottom of the edit window.

Select the building stages from which to move drawings and observations into the newly created one.

Select the kind of observations to move (uncompleted, completed) and optionally make a backup before proceeding.

Touch the Save button to proceed and save.



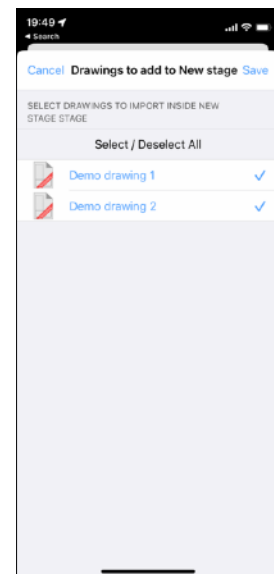
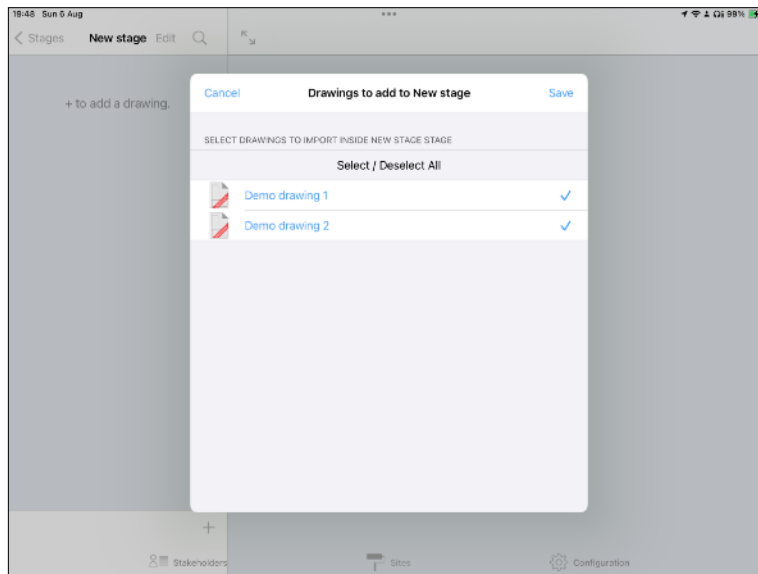
Note: we recommend that you select the "save before moving" option to allow you to restore your project to its previous state in case of a handling error.

Add drawings to a stage

To be able to place observations on your drawings, you must import them in the stage you've just created.

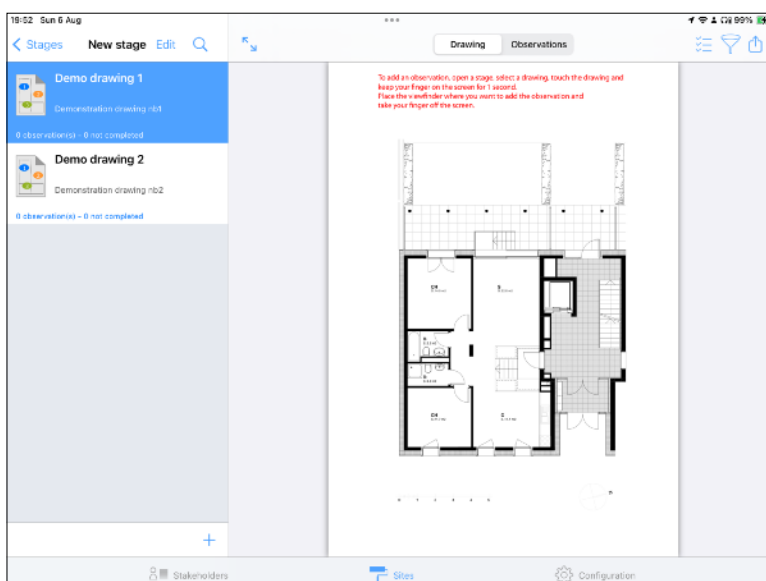
To add editable drawings, press the + button at the bottom of the stage drawings list, the list of your original drawings will appear on screen.

Select the drawings you want to add to the stage (you must have imported some original drawings before) then press the «Save» button.



Your editable drawings now appear in the stage drawings list.

Select one of these drawings, it will appear in the right part of the screen on iPad, this is where you will place and manage your observations



Replace original drawing used in an annotated drawing

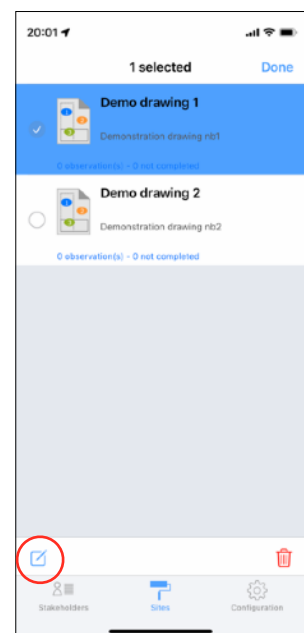
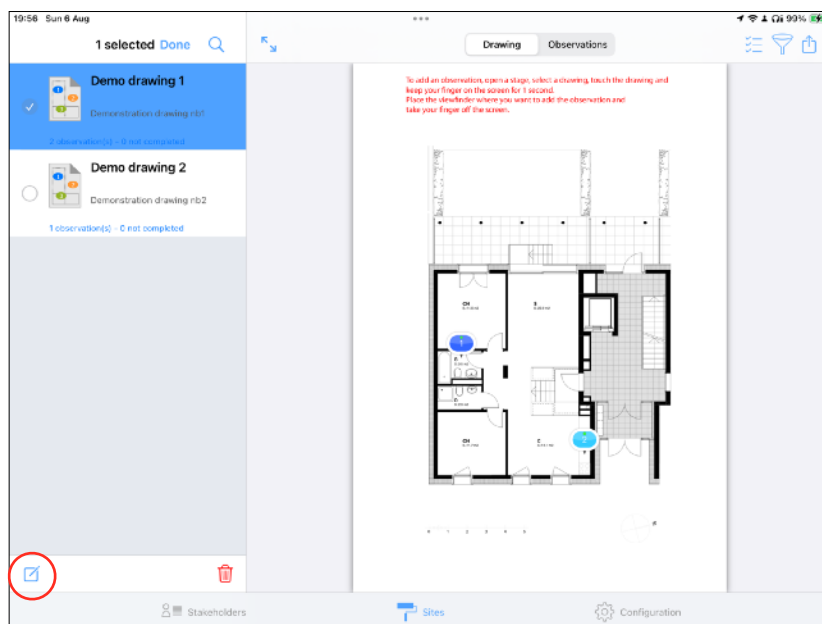
SiteWorks lets you replace the original drawing used in any annotated drawing in case it has been updated.

In order for this feature to work properly, please note the new drawing has to have the exact same size as the replaced drawing in order for the observation position to be kept meaningful.

First go into the site original drawings library and import your new original drawing into the app (see page 13).

Once added to the original drawings library, navigate to the stage where the annotated drawing to update is stored.

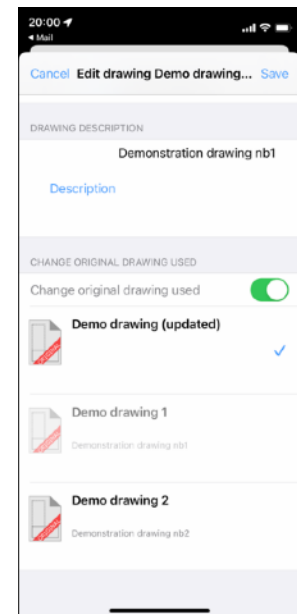
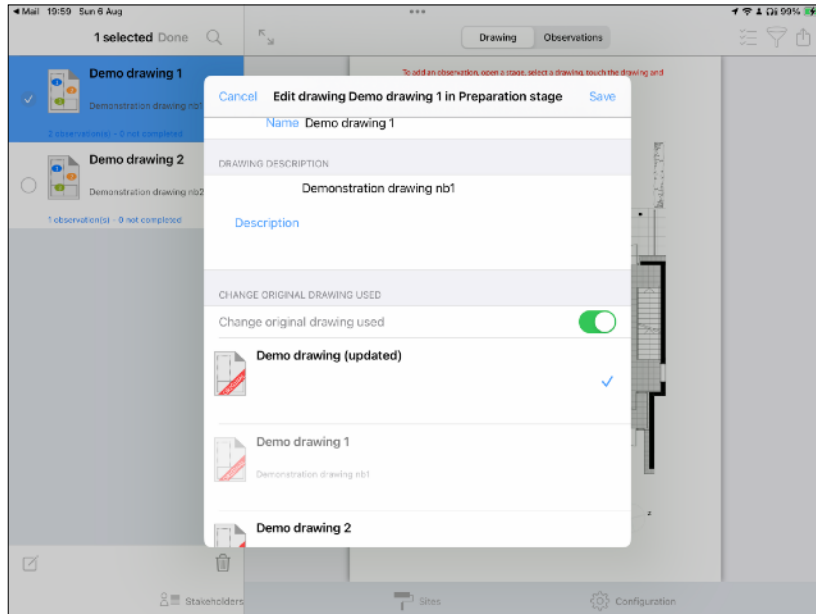
At the top of the stage annotated drawings list touch the « Edit » button, select the annotated drawing to update and touch the pencil button at the bottom of the list.



On the edit screen appearing, switch on « Change original drawing used ».

Select the new original drawing you imported at the beginning of the procedure from the list displayed.

Hit the « Save » button and confirm the change.



The annotated drawing is now updated with the new drawing.

Adding and deleting observations

Once your site is created, original drawings are imported and one or more stages are configured, you're ready to start adding observations.

Observations can only be added on stage drawings, not on original ones, you must create a stage and import your drawing into it to be able to add observations (see above).

Open a site, select «Stages» and open a stage you have setted up.

Select a drawing from the list, it will be loaded and shown on the right part of the app.

Add an observation to a drawing

Zoom on the part of the drawing where you want to place an observation.

Do a long press (1 second) on your drawing, a viewfinder appears on screen, move it keeping your finger on the screen.



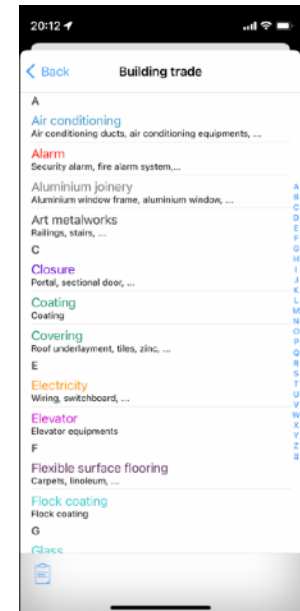
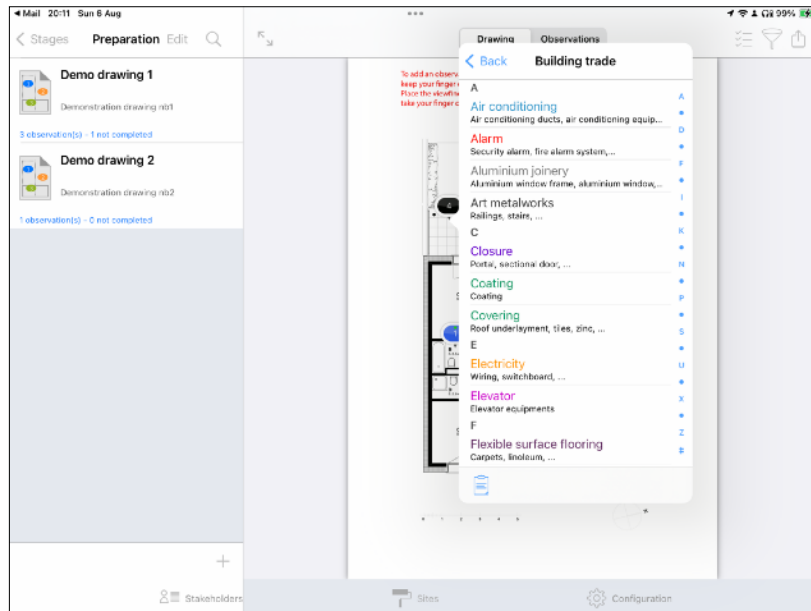
Once the center of the viewfinder is where you want to place your observation, take your finger off the screen.

A pin representing your observation will be placed and a popover will appear allowing you to set up the observations details.

Set up an observation

Select a building trade

Once your finger is taken off the screen, the list of building trades will appear on screen, pointed to the pin representing the observation.

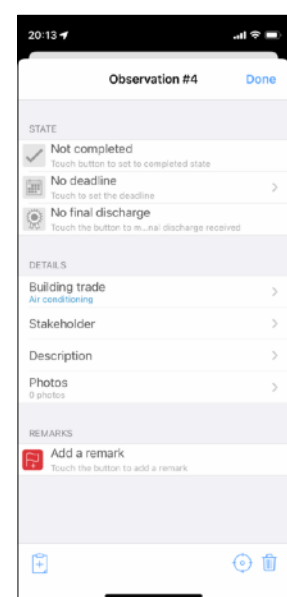
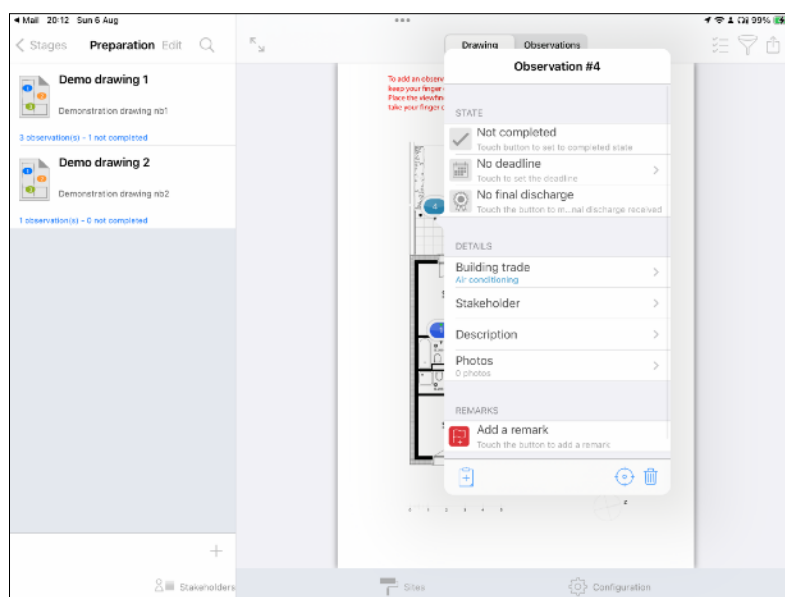


(Visible building trades of this list are configurable in the «Configure» tab of the app.).

Select the building trade matching your observation.

The observation info table is now visible..

This is where you will configure all the details of your observation:



Define a deadline

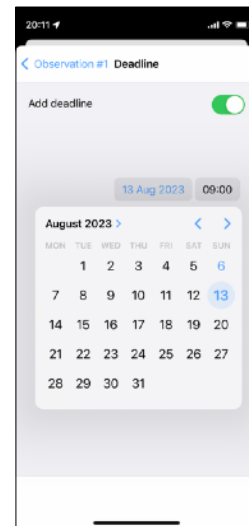
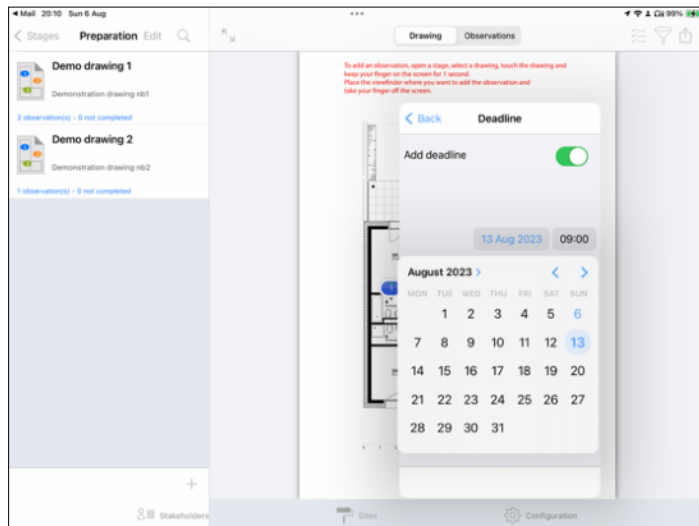
You can define a deadline for each observation.

Default deadline options can be set for every new observations from the «Configuration» pane.

Once the deadline is reached, a notification will be shown in the notification center if the app is closed or inside an alert box if the app is in use.

To define a deadline, touch the «Deadline cell»

Set the switch to on and set the deadline.



Observations with a deadline will be shown on the drawings with a circular indicator varying in function of the time left.



Less than 1 day



1 day



2 days



3 days



4 days



5 days



6 days



7 days



btw 1 and 2 weeks



btw 2 and 3 weeks



btw 3 and 4 weeks



more than 4 weeks

Select a stakeholder

Touch the «stakeholder» cell in order to define the contact whom you want to attribute the observation to and select the stakeholder involved.

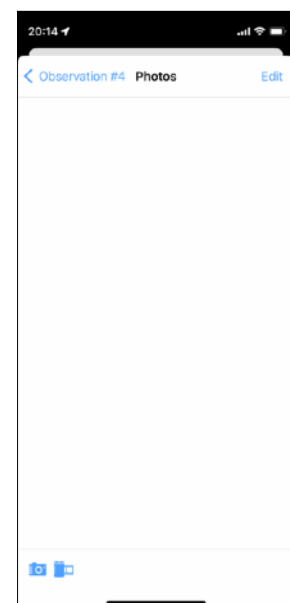
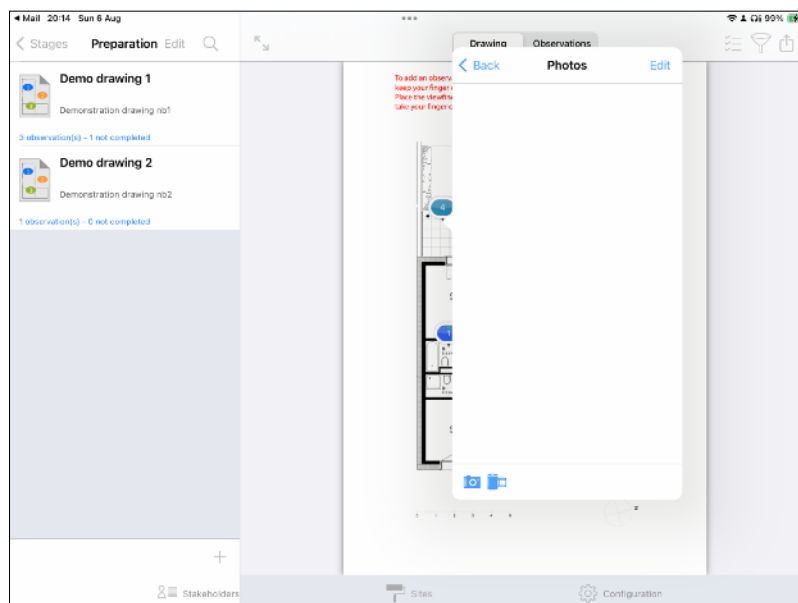
Add a description

Press the «description» cell and enter the observation description (Standard description can be configured in the «Configuration» tab).

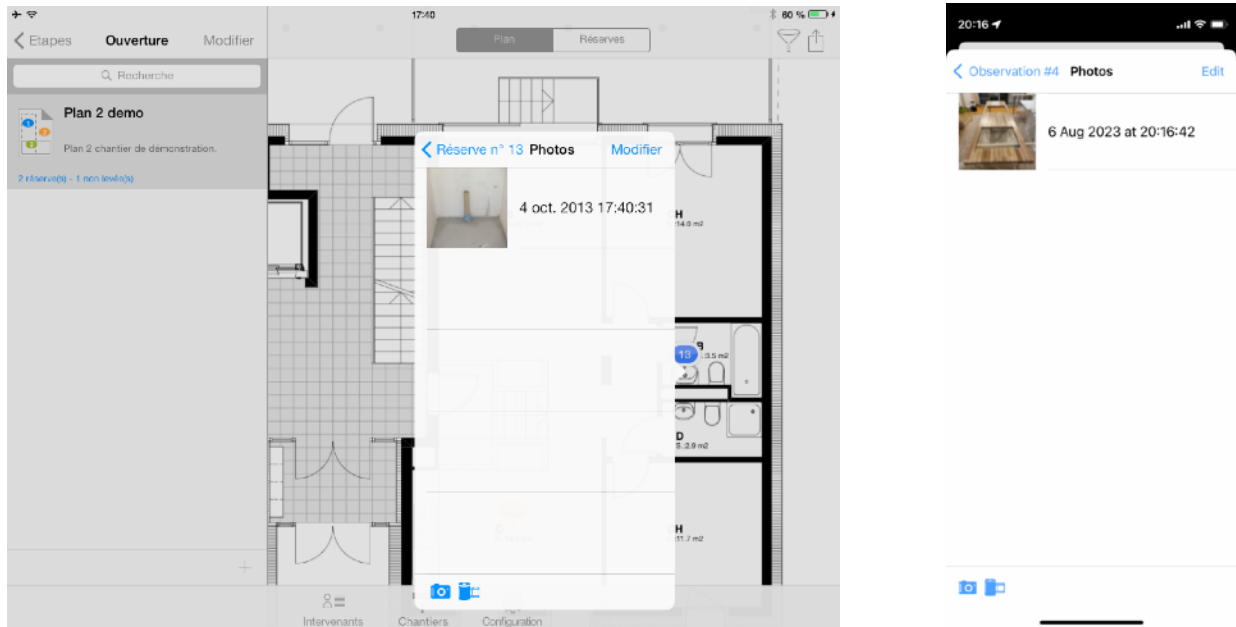
Revenez au tableau d'état de la réserve en appuyant sur le bouton retour nommé «réserve n°X».

Add a photo

To add a photo related to the observation, press the «Photos» cell, then press the camera button (except on iPad 1) to take a picture or the camera roll button to choose a picture from your iPad's photos library.

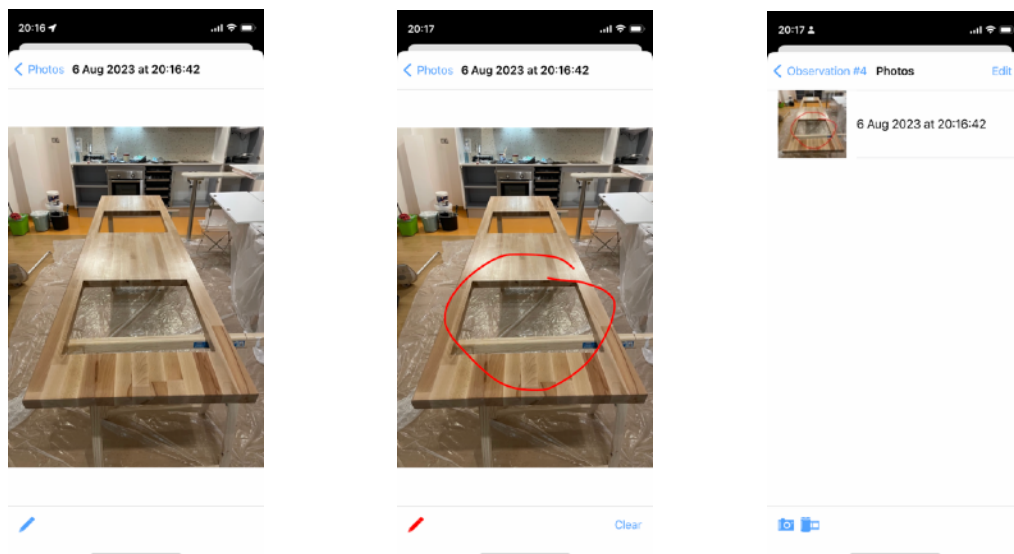


Once your picture taken or picked from the library, it will appear in the photos list. You can select it to display and zoom it.
To delete a photo, press the «Edit» button, press the «No entry» sign and press «delete» button.



Annotate a photo

Select a photo from the list and touch the pencil button. The button turns to red, you are in edit mode and can draw on top of the photo.
Once you finished annotating, touch the pencil button again or go back to the photo list to quit the edit mode.



Add a remark

Remarks allow you to add complementary comments about an observation; active remarks (red flag) can be integrated in your PDF reports.

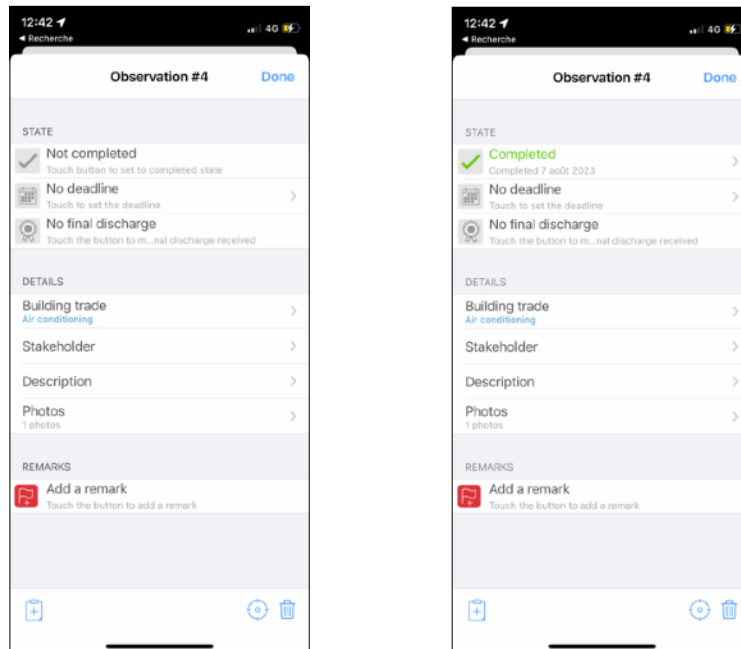
To add a remark, press the «Add remark» cell and enter your remark content.

Remarks have two states symbolized by a flag (green flag for completed, and red for active).

When you add a remark, its state is active by default. To change it, touch the green flag button at the bottom of the remark text box to change its state of the remark to complete.

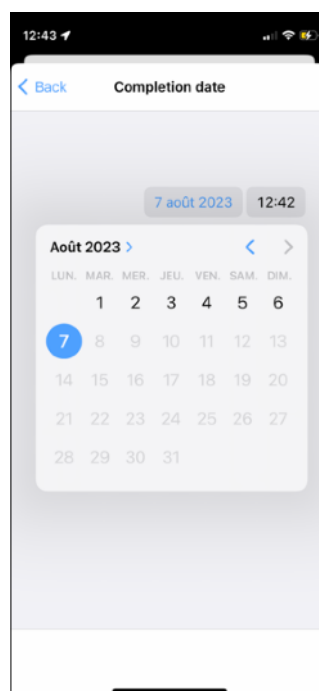
Set an observation completed

To set an observation as «completed», touch the «gray tick button» at the top of the observation window, the button will turn green and show «Completed» text (to cancel, touch again the same button).



Completion date is automatically set up to the current date when you set an observation to completed state.

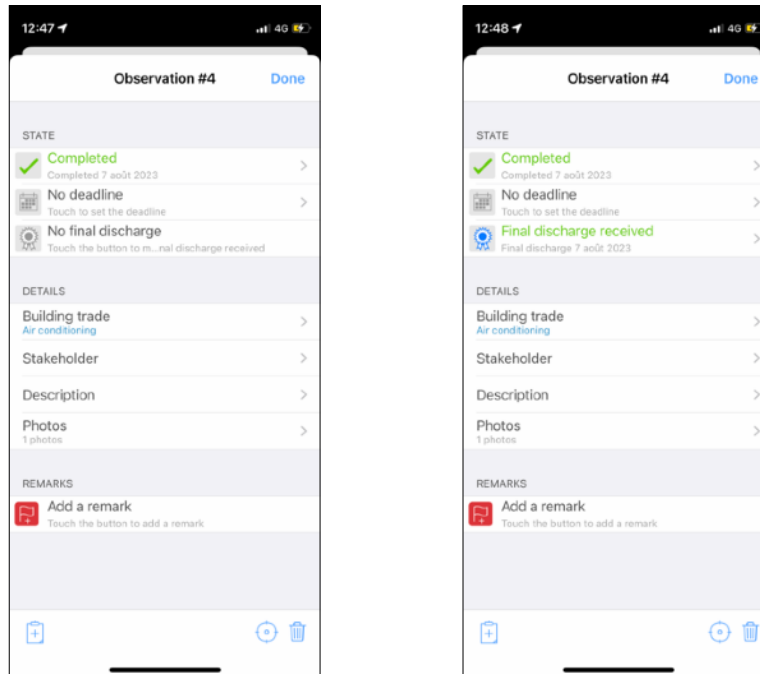
You can change it manually by pressing the «Completed» cell. A date picker will be pushed on screen and let you pick a date and time.



Final discharge

The app offers you a record to follow the reception of final discharges linked to an observation.

To set a final discharge state received, press the gray badge button, it will become blue and show «Final discharge received» message (to cancel, repeat the same operation)



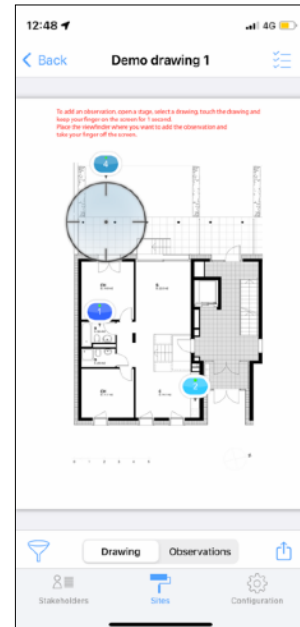
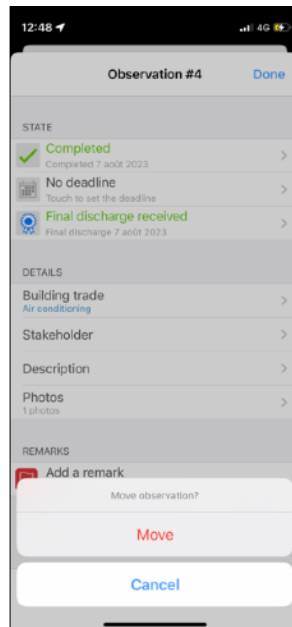
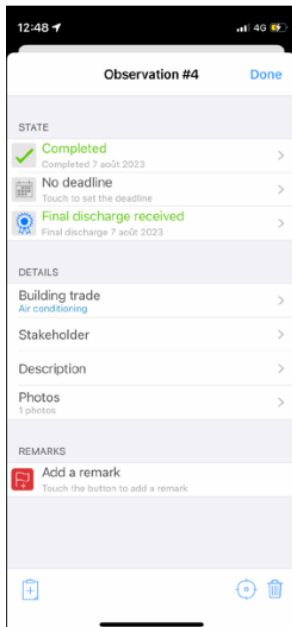
The final discharge receipt date is automatically set when changing the state to received.

You can change it manually by pressing the «Final discharge received» cell. A date picker will be pushed on screen and let you pick a date and time.


Move an observation on a drawing

To move an observation, touch the viewfinder button at the bottom of the state window and touch the move button appearing on screen.

Move the viewfinder and take your finger off the screen when the observation is in place.

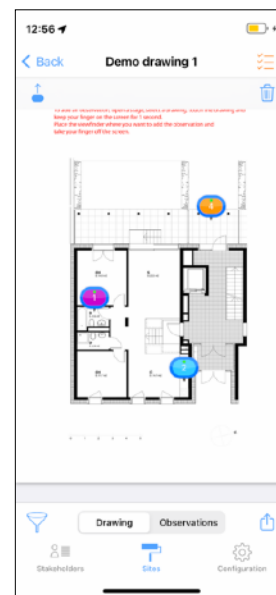
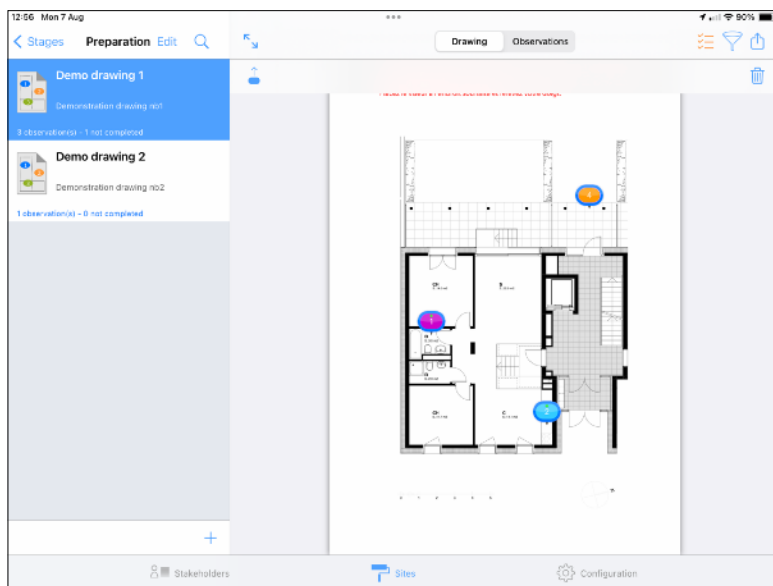



Move observations to another drawing

If you need to move one or multiple observations from one annotated drawing to another (not necessarily in the same building stage), touch the multiple selection button  on the top right hand side corner of the annotated drawing or observations list.

Select the observations to move (touching the pins in the drawing view or touching the observation cell in the list view).

Selected pins appear ringed with blue.



Touch the move observation button  and select the annotated drawing to move the observations to.

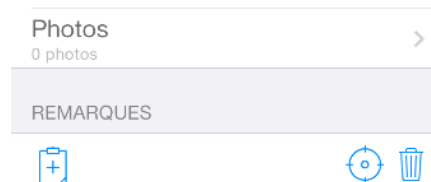
Touch the OK button to proceed.

Note: If the destination original drawing is different from the source original drawing, observations could appear in a wrong position.

Copy / Paste an observation

In order to speed up repetitive observations input, SiteWorks let you copy / paste observations from and to any annotated drawings.

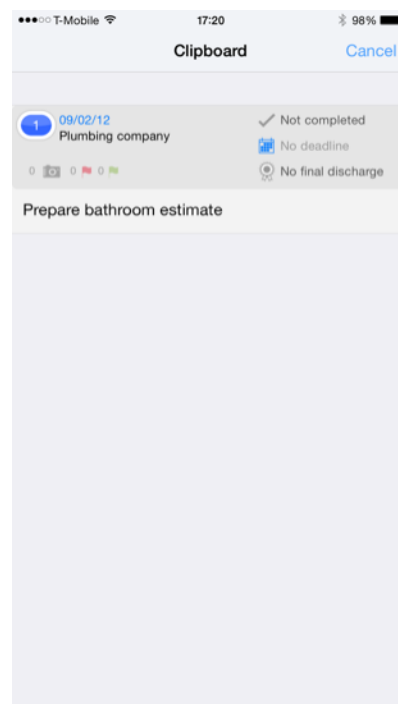
To copy an observation, touch the clipboard button with a + sign at the bottom left hand side of the observation's edit window.



To paste an observation, proceed like you'd do to add an observation. Touch the clipboard button at the bottom left hand side of the building trades list appearing on screen when you lift your finger off the screen.

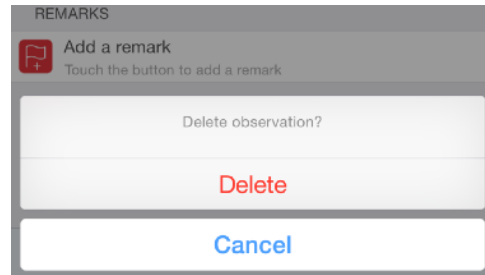



Select the observation you want to paste from the clipboard. All informations from the copied observation will be paste into the new one (building trade, stakeholder, description, images, remarks, ...).



Delete an observation


To delete an observation, press the «Trash bin» button at the bottom of the observation popover, then press the «Delete» button to confirm deletion.



Note: If you want to delete multiple observations in one pass, enable the multi-selection mode as described in « Move observations to another drawing », select the observations to delete and press the « trash » button  at the top right hand corner of the annotated drawing or observations list.

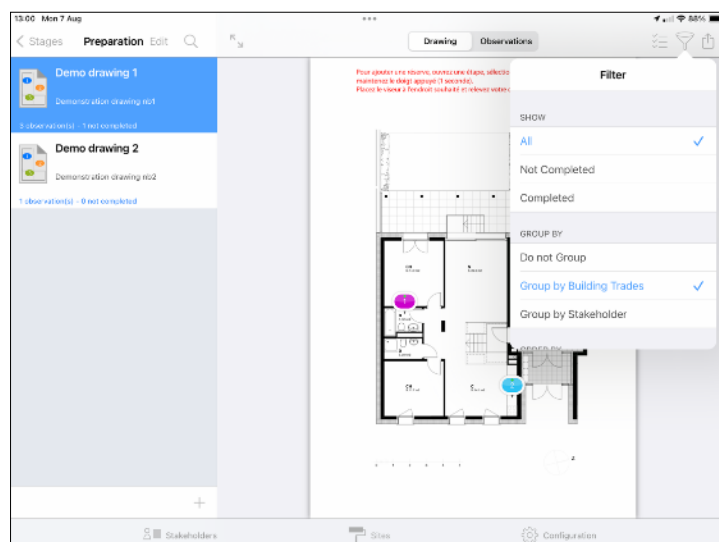
Filter observations visibility

SiteWorks let you filter what kind of observations it should show on screen and ordering preferences for the tabular view.

In order to filter observations shown on screen, touch the filter button  and select your parameters.

When some observations could be hidden because of the filter parameters, the button turns to orange.

Please note that the filter has no effects on what's inside the reports, it only affects the display of observations inside the app.



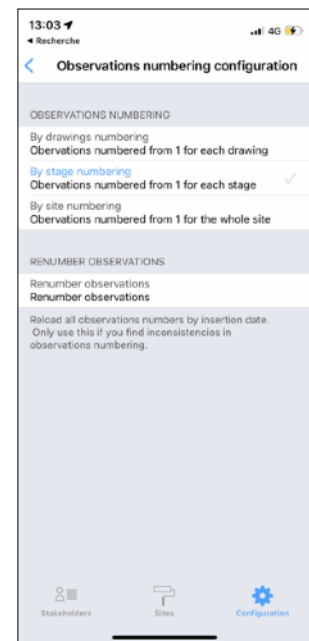
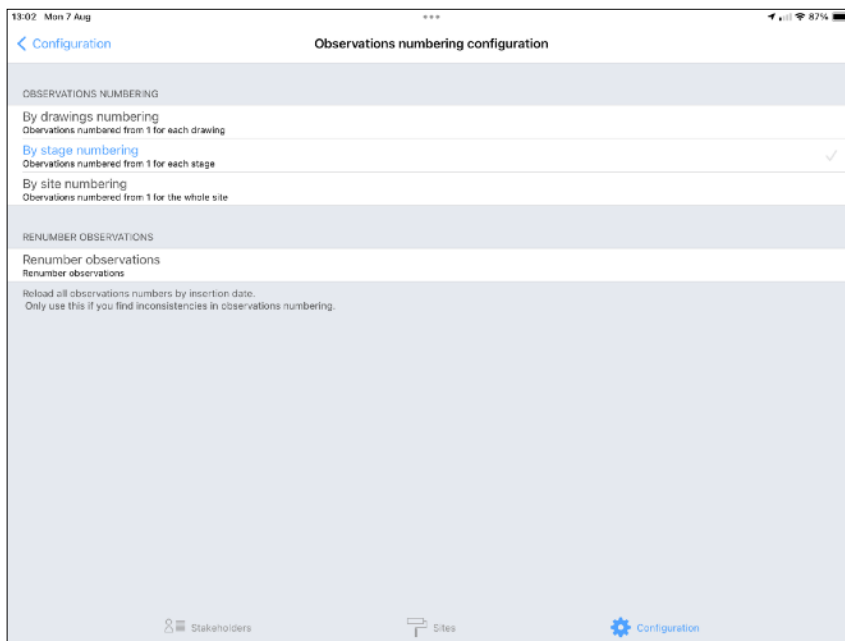
Observations numbering

Observations are numbered by creation date. By default, observations are numbered from 1 for each building stage.

You can modify this behavior from the «Configuration» pane of the app in «Configure observations numbering».

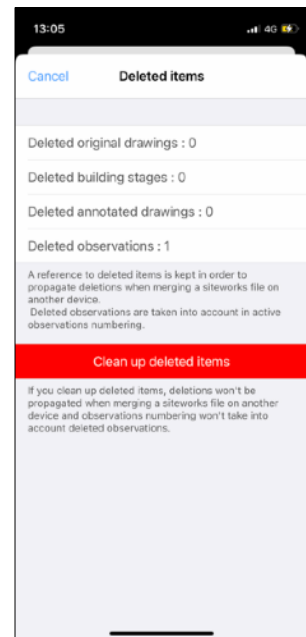
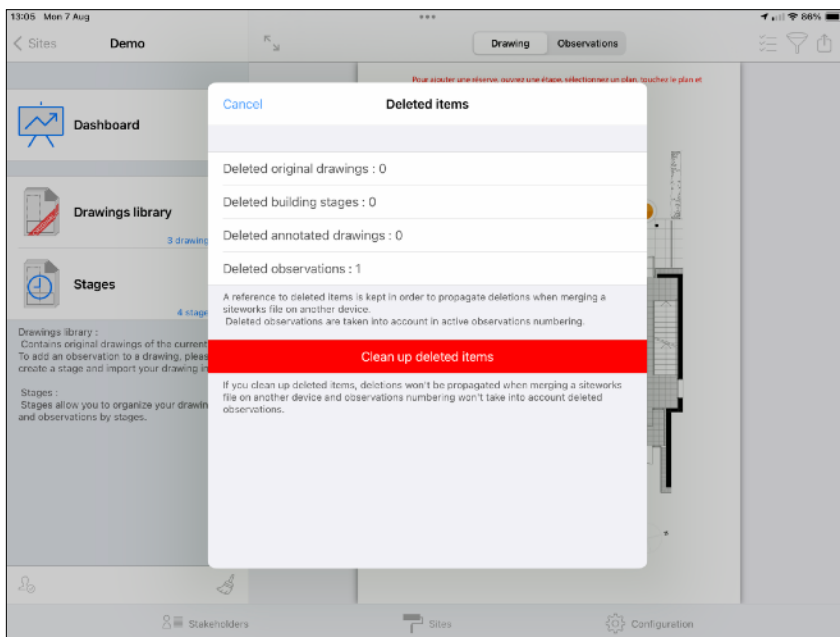
You can choose to number observations from 1 for each drawing, each building stages (default) or to use a unique number for the whole site.

Those numbering options can be edited at all time and new numbering will be updated instantly.



Observations deletion won't affect observations numbering. If you remove observation #1 on a drawing, observation #2 will keep its id number after the deletion.

If at some point you want to ignore deleted observations from the numbering process, you can cleanup deleted elements by touching the trash button at the bottom right hand side corner of the site's root.



Please note that if you cleanup deleted elements from a site, when you'll share and merge siteworks files, those elements could be recreated on your device and deletions won't be propagated to other users merging your siteworks file.

Generate send reports, punch/snag list

SiteWorks let you generate pdf and csv (Excel, Numbers, Openoffice) reports, punch/snag lists, and share it with your contacts by email, AirDrop, iCloud, 3rd party cloud services, WebDav or via iTunes/ Finder.

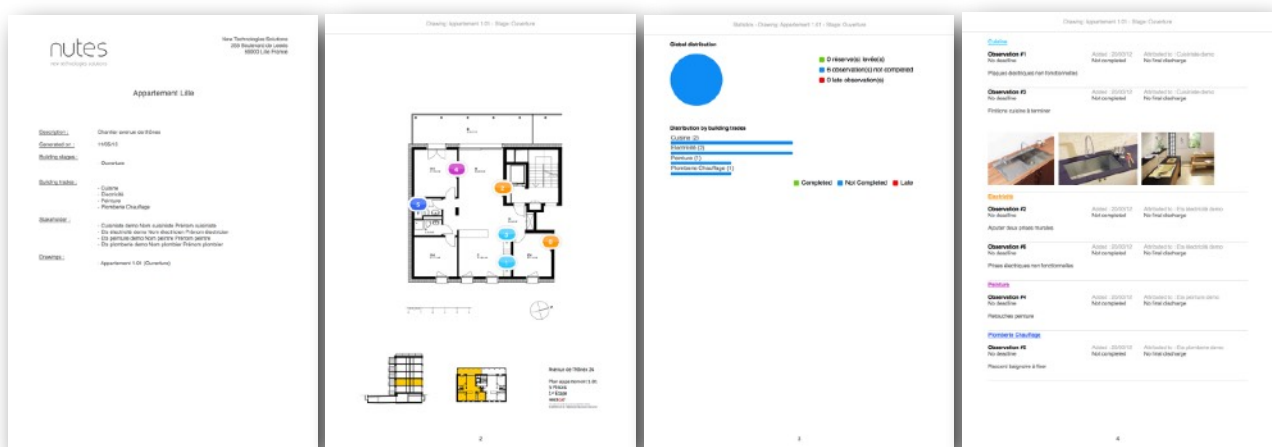
Reports can be generated for a single annotated drawing, a single stage or the entire site.

You will also be able to set which building trade to include, and if completed observations should be included.

PDF reports, punch/snag list content

PDF reports contain for each drawing:

- The selected drawing with its color pins for each observation,
- The observations statistics of the drawing,
- The detailed observations (Date added, completion status, final discharge status, linked ,stakeholder, description, remarks and pictures) sorted by building trades.



PDF reports content can be configured from the configuration pane in «Configure PDF Export».

You'll be able to set in particular:

- The logo and header to add to the front page,
- The inclusion of a contact details page
- The size and layout of the document
- Elements included in the report (Photos, date of creation, date of completion, observation's state, statistics, ...).

Excel reports content

Excel reports contains a book with a sheet for each drawings, containing details for each observation (Date added, deadline, completion state, final discharge state, linked stakeholder, description).

Excel reports are compatible with Excel 2007 and above.

Excel reports content can be configured from the «Configuration» pane in «Configure Excel Export».

You'll be able to set in particular:

- Generate a one sheet document or a multiple sheet document,
- The inclusion of a contact details sheet,
- Elements included in the report (Date of creation, deadline, date of completion, observation's state, ...).



Plan	Corps d'état	Réserve n°	Entreprise
Bâtiment A logement N°04	Eau chaude solaire	3	-
Bâtiment A logement N°04	Gros Oeuvre	6	DLC
Bâtiment A logement N°04	Menuiserie bois	8	-
Bâtiment A logement N°04	Peinture	2	-
Bâtiment A logement N°04	Peinture	7	-
Bâtiment A logement N°04	Peinture	9	-
Bâtiment A logement N°04	Peinture	10	-

CSV reports, punch/snag list content

CSV reports contain for each selected drawing all matching detailed observations (Date added, completion state, final discharge state, linked stakeholder, description) in CSV format.

CSV format is compatible with all major spreadsheet softwares, you will be able to import your punch/snag lists, report data with all your compatible softwares.

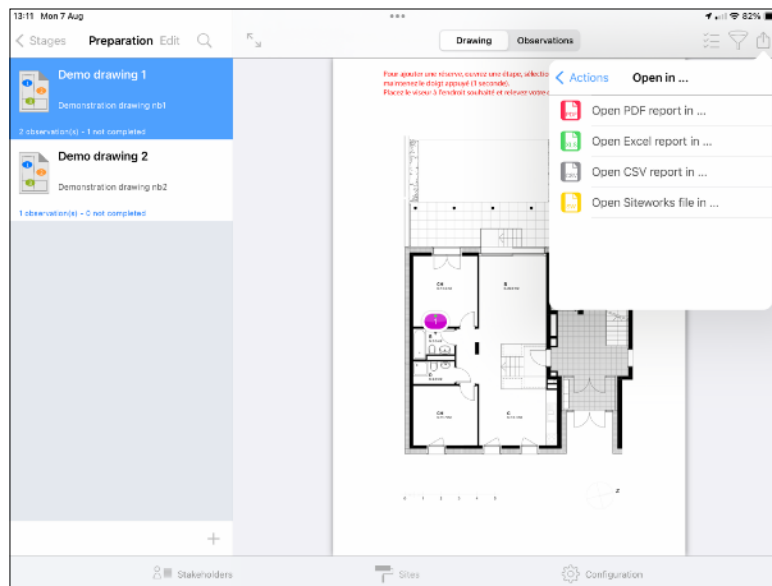
You can configure the data separators and text encodings into the «Configuration» tab.

Open a report with a third party app.

SiteWorks let you generate and open a report in a third party app, so that you can archive it in an app like GoodReader, for example, or edit an Excel report in a spreadsheet app like Numbers.

Go to a stage and select a drawing.

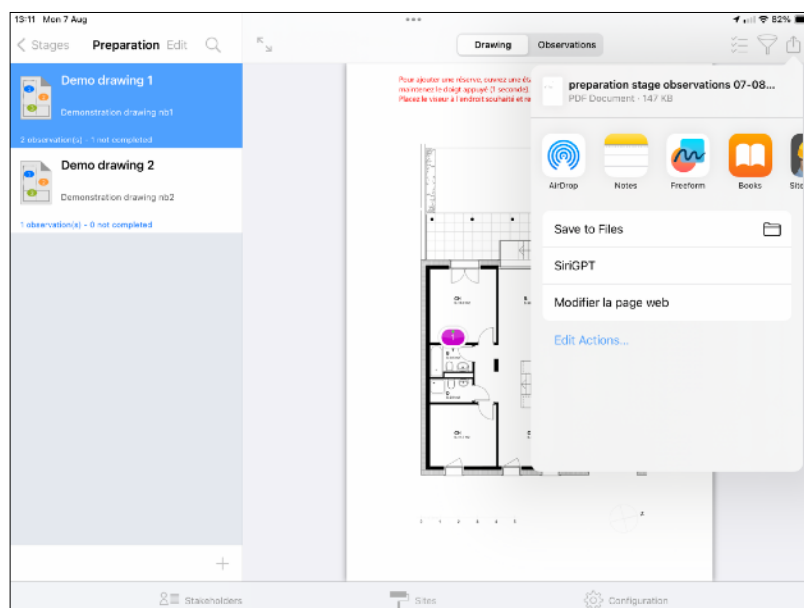
Touch the «Action button» in the top left hand side of the window and select «Open in ...»



Select the type of report to generate and configure it.

Once the report is generated, the app will present you a list of compatible apps to open the document.

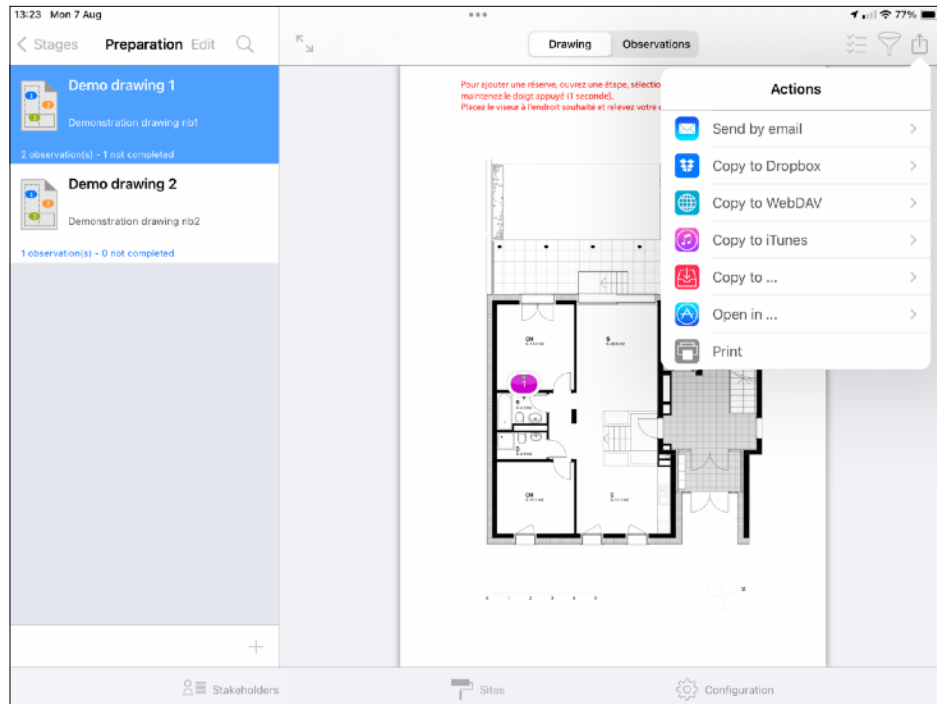
Select the app of your choice and the app will launch and show your report.



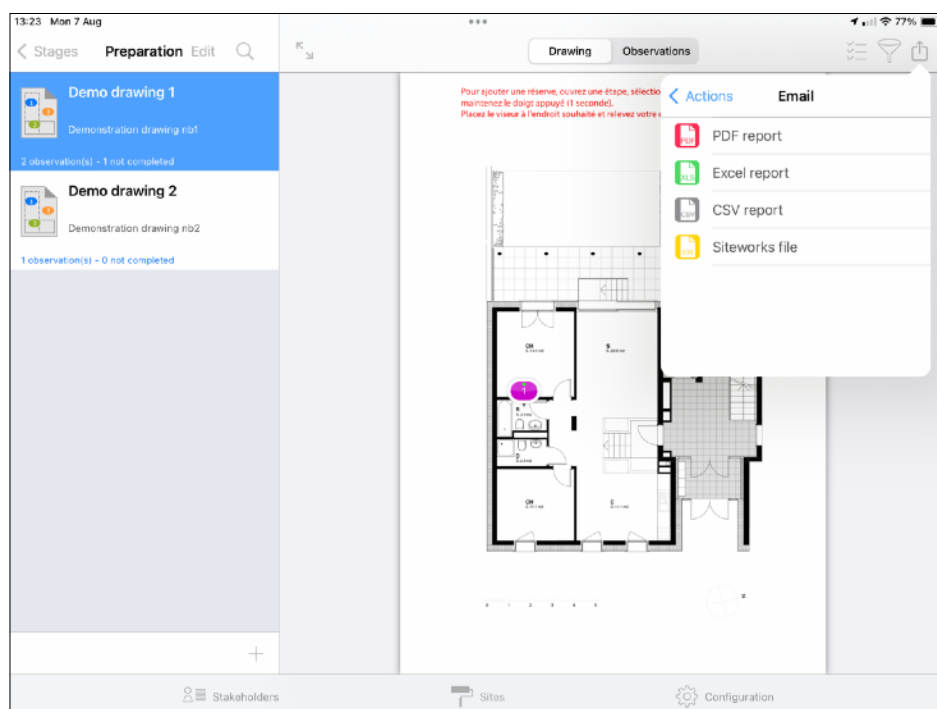
Send a report, punch/snag list by email (pdf, excel, csv or siteworks)

Go into a site stage and select a drawing.

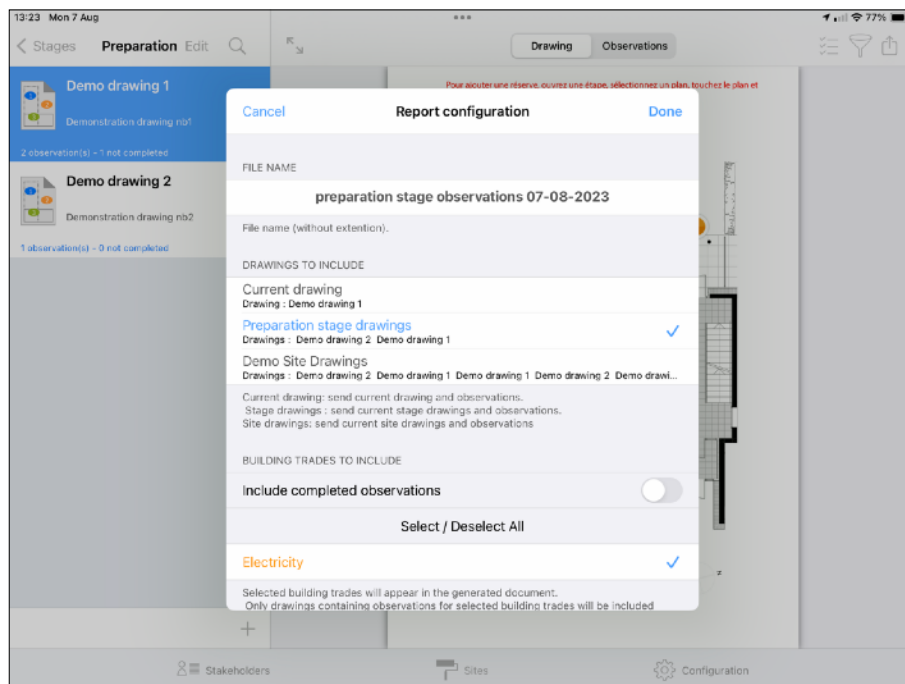
Press the Action button at the top right corner of the app screen and select «Send by email»



Select «PDF report» (or CSV report depending on the file you want to send)



Export configuration popover appears on screen, you will now be able to configure your report data (File Name, drawings, building trades, and observations to include)



File Name

You can modify the file name by touching the preset name.

Select Drawings to Include

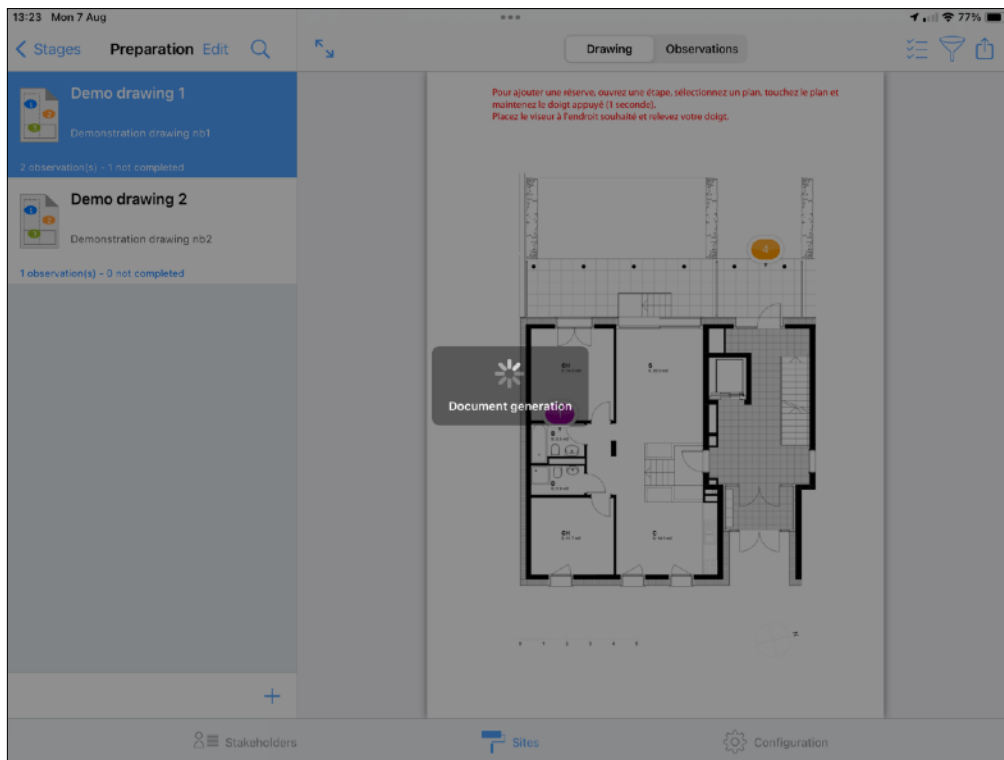
- Select «Current drawing» to generate a report for the current drawing,
- Select «Drawings of stage Stage_name» to generate a report containing drawings and observations contained in the current stage,
- Select «Drawings of site Site_name» to generate a report containing drawings and observations contained in the current site.

Select Building trades to include

The building trade list only shows building trades linked to observations in the drawings selected before.

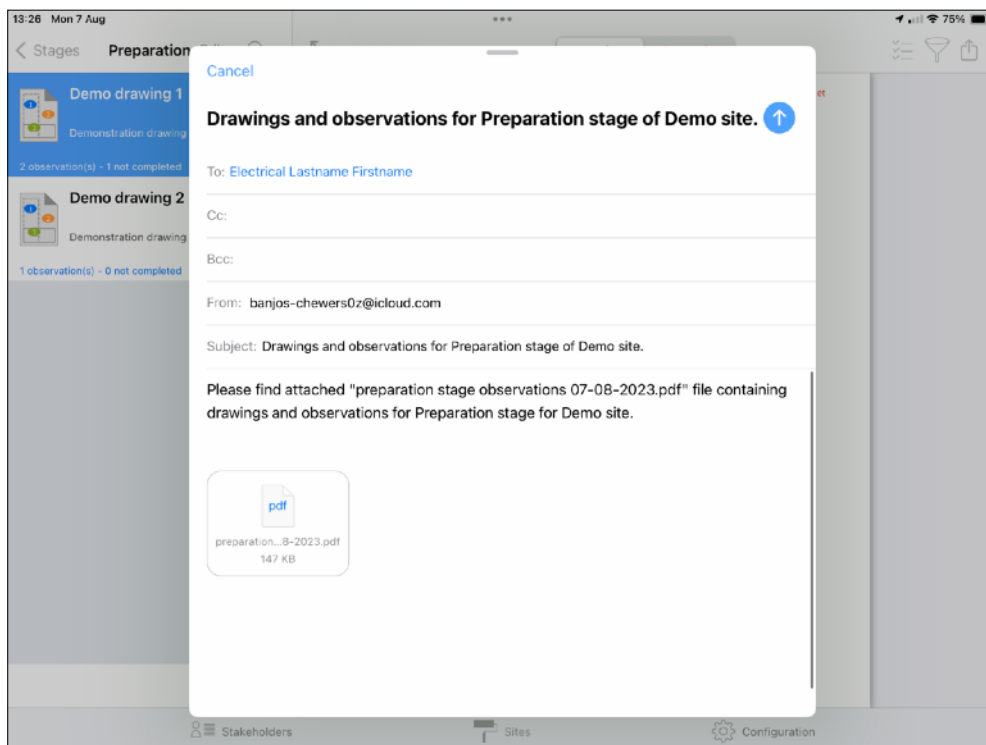
Select building trades you want to include in your report and switch on «Include completed observations» if you want those to appear in your report, then press «Ok» button.

Wait during document generation



Once the report has been generated, email send popover will show on screen.

Add recipients, modify subject and content if needed and press «Send» button.



Save a report with the Files app (to local storage, iCloud, third-party cloud services with iOS 11 and later)

From an annotated drawing, contained in a site stage, tap the action button and select "Copy to...", select the type of document to generate (pdf, excel, csv, or siteworks) then configure your report as before.

Once the document is generated, navigate in the Files app window to the folder where the report should be saved, then tap the "Save" button.

Save a report, punch/snag list to your Dropbox (iOS11 and below)

From a drawing contained in a stage, touch the action button and select «Copy to Dropbox», select the file format to generate (pdf, excel, csv or siteworks) and configure your report (see above).

Once your document is generated, browse your dropbox to the folder inside which you want to upload your file and press save button.

Once upload finished, the file will be present in your dropbox available from all your connected devices.

Save a report, punch/snag list to a WebDAV server

From a drawing contained in a building stage, touch the action button and select «Copy to WebDAV», select the file format to generate (pdf, excel, csv or siteworks) and configure your report (see above).

Once your document is generated, browse the WebDAV server to the folder into which you want to upload your file and press save button.

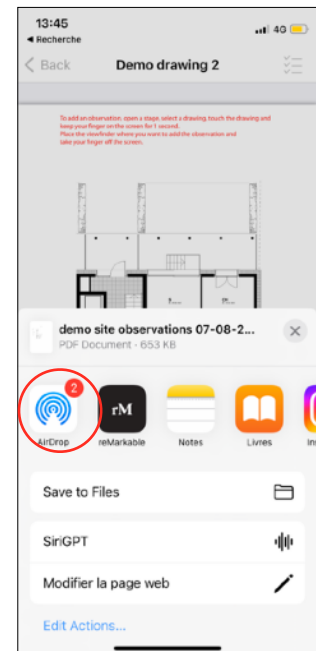
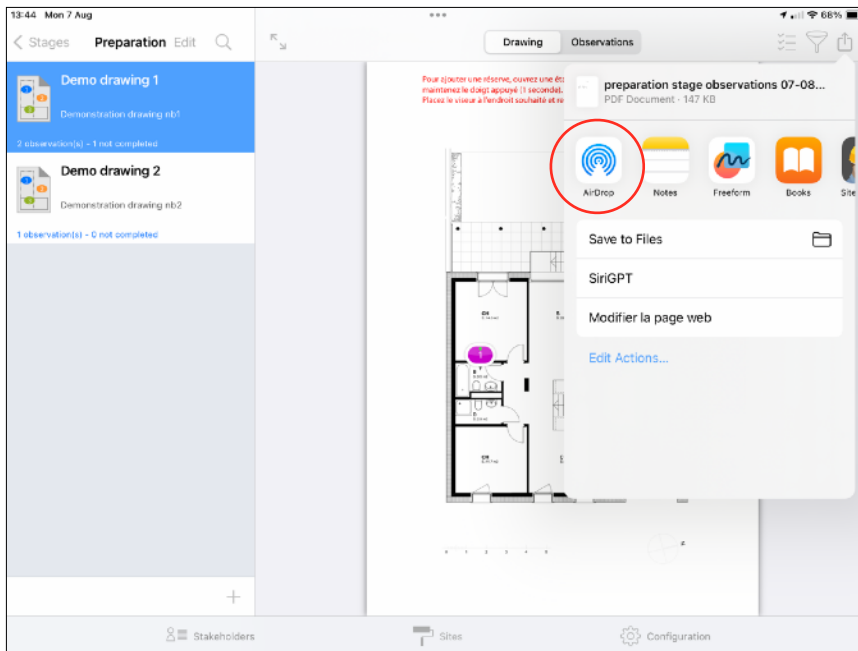
Once upload finished, the file will be present in the WebDAV server and available from all your connected devices.

Save a report, punch/snag list via AirDrop

AirDrop let you transfer documents to compatible iOS devices nearby.

From a drawing contained in a stage, touch the action button and select «Open in...», select the file format to generate (pdf, excel, csv or siteworks) and configure your report as detailed before.

Once your document is generated, wait for a few seconds and select the device to send the document to.



Accept the transfer on the destination device, and select SiteWorks in the list appearing on screen to open the file.

Send a report, punch/snag list to iTunes / Finder

From an annotated drawing contained in a stage, touch the action button and select «Copy to iTunes», select the file format to generate (pdf, excel, csv or siteworks) and configure your report (see above)..

Once your document is generated, follow the guide corresponding to your Windows or MacOS version below to download :

Transfer reports from SiteWorks to the Finder (MacOS Catalina ou above)

Please refer to the following guide and upload your items to the SiteWorks application from the Finder:

<https://support.apple.com/en-us/HT210598>

Transfer reports from SiteWorks to iTunes (MacOS Catalina or below)

Please refer to the following guide and upload your items to the SiteWorks application from iTunes:

<https://support.apple.com/en-us/HT201301>

Transfer reports from SiteWorks to iTunes (Windows)

Please refer to the following guide and upload your items to the SiteWorks application from iTunes on Windows:

<https://support.apple.com/guide/itunes/itns32636/windows>

Collaboration and exchange of SiteWorks files between multiple users and devices

SiteWorks is completely standalone, and all its data is fully saved locally, without ever relying on a web service.

To collaborate effectively among multiple users, please follow the steps below:

- 1) Install SiteWorks on all devices that will participate in the collaboration.
- 2) **Set up and fully configure a construction site on a single device hereafter referred to as the "main device" (drawings, stages, annotated drawings, custom lists of trades and stakeholders if necessary, etc.)**
- 3) Once the site is fully configured, share a siteworks file from the main device with all the devices and individuals who will be working on the same file.
- 4) Each participant will then need to import the SiteWorks file that you just shared.
- 5) Each participant can immediately start working on the construction site.
- 6) When a participant wants to send you their modifications, they will need to send you a SiteWorks file which you will import to the main device.
- 7) The SiteWorks application will automatically merge the data but will also propagate additions and deletions. **Therefore, be careful not to delete any item from any device if you want it to be retained. We advise you to back up your SiteWorks file before each merge in case of a usage error.**
- 8) Repeat this operation from all devices that have made modifications to the site.
- 9) Finally, send a SiteWorks file from the main device to all other devices so they have the same data as the main device.

Backup, Share, Import a siteworks file

The application let you save, share and merge your sites via email, Files App, Webdav or iTunes/Finder.

As you might have noticed when generating reports, all export menus give you an export option named «Siteworks file».

Sitework files allow you to share your sites between multiple users of the app, multiple devices or keep a backup of them.

They contain the entire set of data linked to a site: stakeholders, drawings, stages, observations, etc, and can be imported into the application from the Files App, Mail, Dropbox, WebDav or iTunes, just like original drawings.

To generate a «.siteworks» file, simply press the «Siteworks file» button from one of the actions items, the procedure is the same as for the reports.

Import a siteworks file from iTunes

Follow the guide corresponding to your PC or MacOS version below to transfer the a siteworks file from your PC, Mac to SiteWorks:

Transfer a siteworks file to SiteWorks from the Finder (MacOS Catalina ou above)

Please refer to the following guide and upload your items to the SiteWorks application from the Finder:

<https://support.apple.com/en-us/HT210598>

Transfer a siteworks file to SiteWorks from iTunes (MacOS Catalina or below)

Please refer to the following guide and upload your items to the SiteWorks application from iTunes:

<https://support.apple.com/en-us/HT201301>

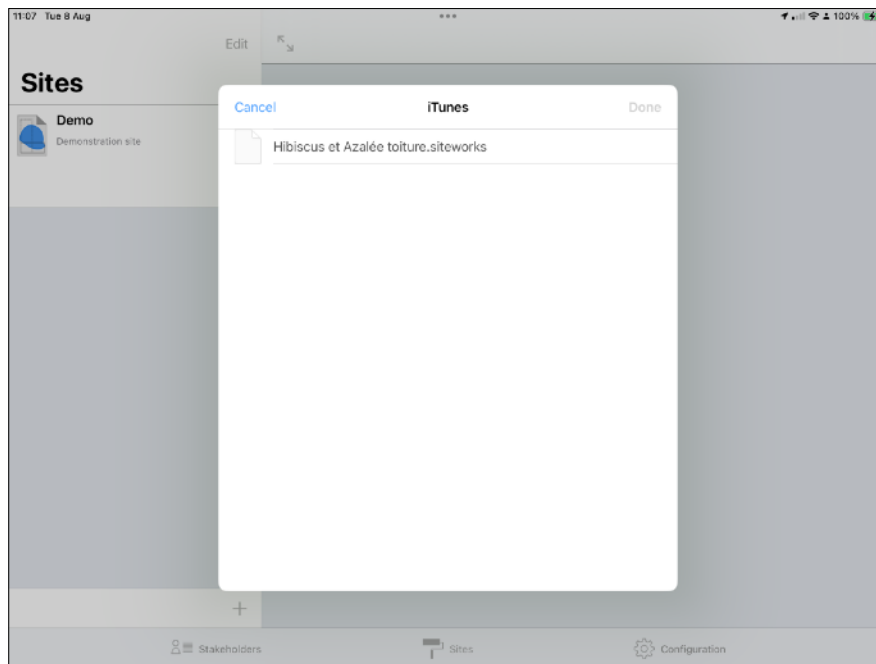
Transfer a siteworks file to SiteWorks from iTunes (Windows)

Please refer to the following guide and upload your items to the SiteWorks application from iTunes on Windows:

<https://support.apple.com/guide/itunes/itns32636/windows>

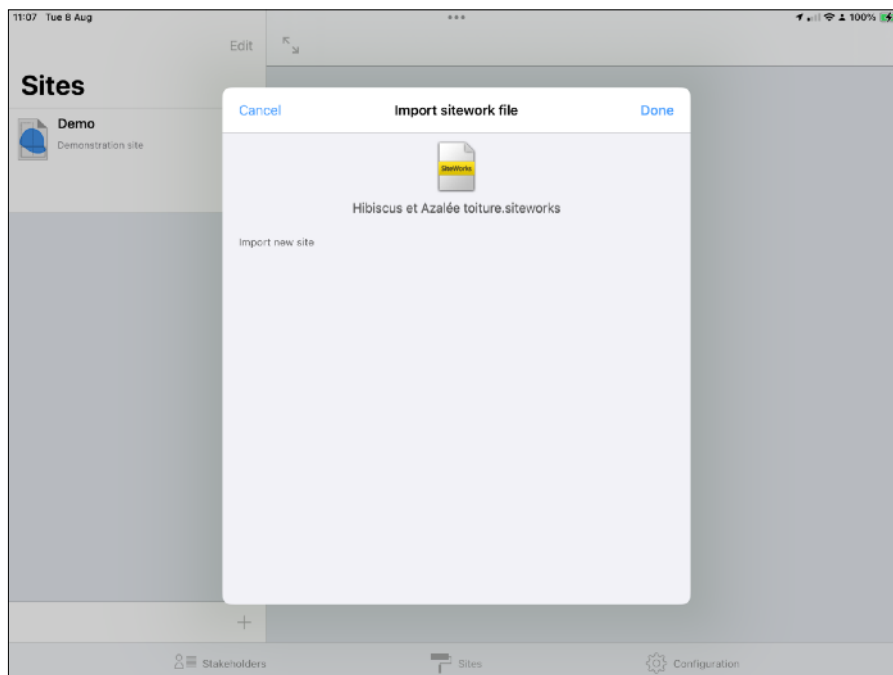
Once the siteworks file is transferred, start the app and go to the Site tab, into to the sites list and press the + button.

Press iTunes button on the popover appearing on screen, select the .siteworks file to import and press the «OK» button.



Import a new site

If this site is not present in the app, touch the «Done» button and the site will be added to the app.



Merge or replace an existing site

If the siteworks file you're importing is present on your device, you'll have the choice to merge it with the local site or to replace the local site by the imported siteworks file.

To be able to use siteworks file merging between multiple devices, please create a site on one device and share it with your other devices (via Dropbox, email or iTunes) and import it on your other devices. You will then be able to merge your siteworks files on every device and keep your local data up to date.

Merging a siteworks file

From 1.6 version, the app keeps an history for every elements edits in the app to let the user propagate its edit, inserts and deletions to other users and merge siteworks data coming from other users.

The app can automatically merge the content of a siteworks file with the local site's informations, based on the date of edits, inserts and deletions.

Each time you create, edit, remove an item in the app (Drawing, observation, photo, annotation, remark, ...), a timestamped record is saved to database and integrated to generated siteworks files.

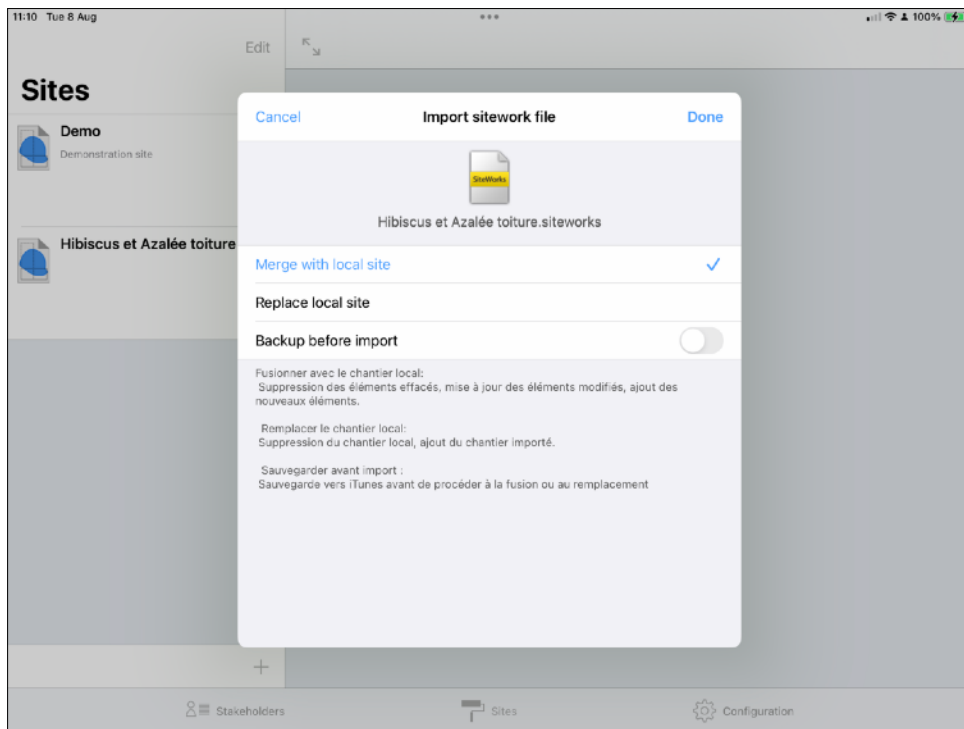
As siteworks file merging process is based on date and time of edits, please set the «Set Automatically» date and time switch to on in the «Settings» app on all of your devices.

The app will propagate:

- Elements deletions : if you import a siteworks file where the observation nb 6 has been deleted, it will automatically be deleted from your local site at the time of merge,
- Changes made to every items in the site (Observations, descriptions, photos, remarks, annotations,...) and will keep the latest changes after merge. If two users have edited the same observation on their devices, when they will merge each others siteworks files, the app will keep the lastly edited record on both devices.
- Newly added elements present in the siteworks file (New drawings, stages, observations, photos, ...).

As the app will propagate deletions, you have the ability to make a backup of your local data before merging to avoid any unwanted loss of data by checking « Backup before import».

To merge a siteworks file with a local site, select «Merge with Local site», check «Backup before import» if needed and press «OK» button.



Replacing a site with a siteworks file

You can choose to replace all your local site data with the content of a siteworks file.

All your local site's data will be deleted and replaced by the content of the siteworks file.

To replace a local site with the imported siteworks file, select «Replace local site» and press «Done» button.

If you want to keep a backup of your local file before replacement, check «Backup before import».

Import SiteWorks file from the Files app (from iOS 11)

Same as the « Import a construction site from iTunes/Finder » section, but select "Browse" after tapping the + button.

Import a siteworks file from Dropbox (before iOS11)

Same as « Import a siteworks file from iTunes » section, but select Dropbox after pressing + button.

Import a siteworks file from a WebDAV server

Same as Import a siteworks file from iTunes section, but select Dropbox after pressing + button.

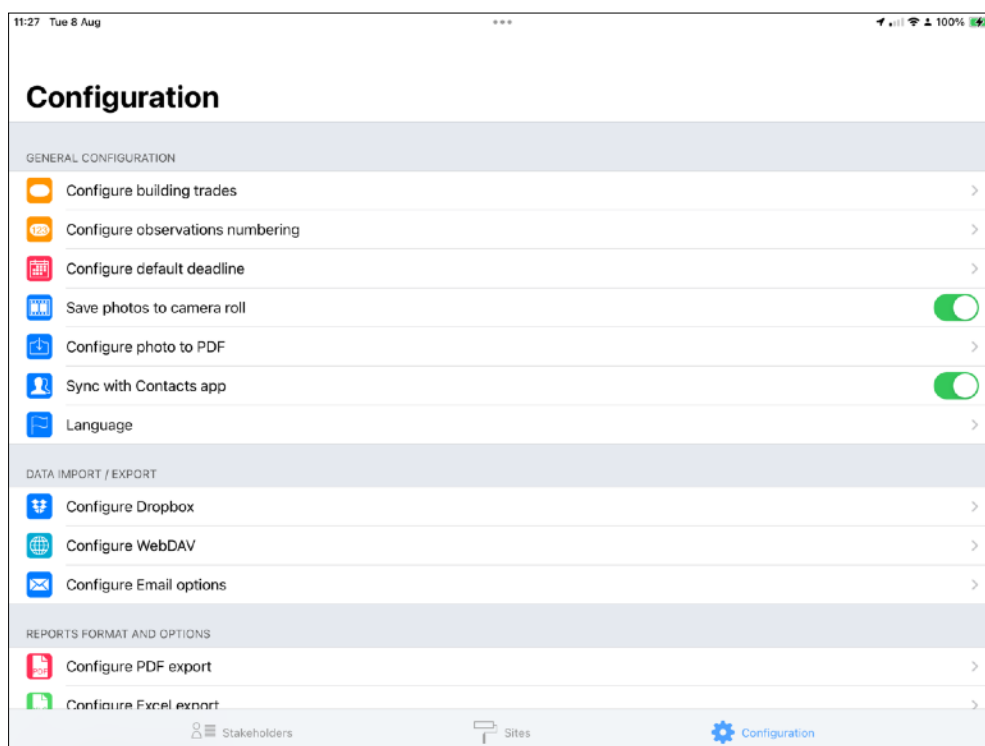
Import a siteworks file from Mail

Same as [Import from Mail app](#), with a .siteworks file attachment.

Configure the application

«Configuration» tab let you:

- Customize and add building trades (name, description, colour, visibility)
- Configure observations numbering
- Configure default deadline
- Configure photo to pdf resolution
- Configure your Dropbox account
- Configure a WebDAV server
- Configure email options
- Configure content and layout of reports
- Import and export configuration files



Configure building trades

The app contains 36 default building trades. The color is the only customizable parameter of default building trades.

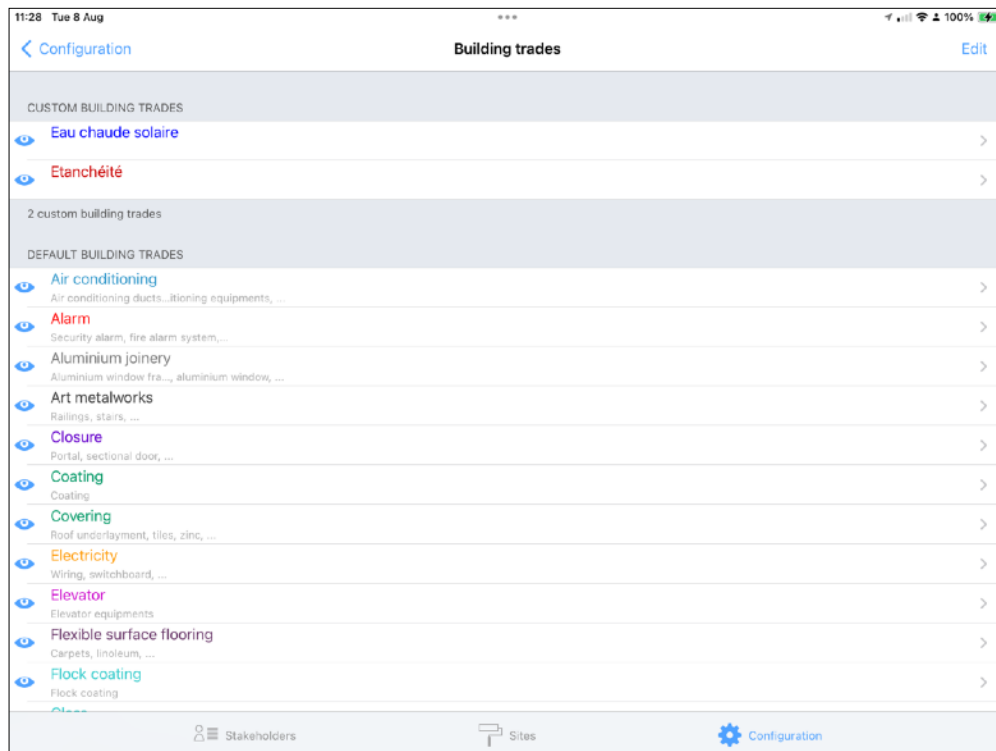
Modify building trades

To configure building trades, select the «Configuration» tab and touch the «Configure building trades» cell.

Building trade configuration screen appears on screen.

It contains a section dedicated to custom building trades and another dedicated to standard building trades.

An eye shape button let you set the visibility of building trades from the observation add popover, so you can hide the ones your not using.



To hide or show a building trade, press the eye button. If it is blue, the building trade will be shown when adding an observation, otherwise it wont be.

To edit a building trade, press the «Edit» button and touch a building trade.

Default building trades cannot be renamed, their color is the only customizable parameter.

Custom building trades are fully customizable (name, description, color).

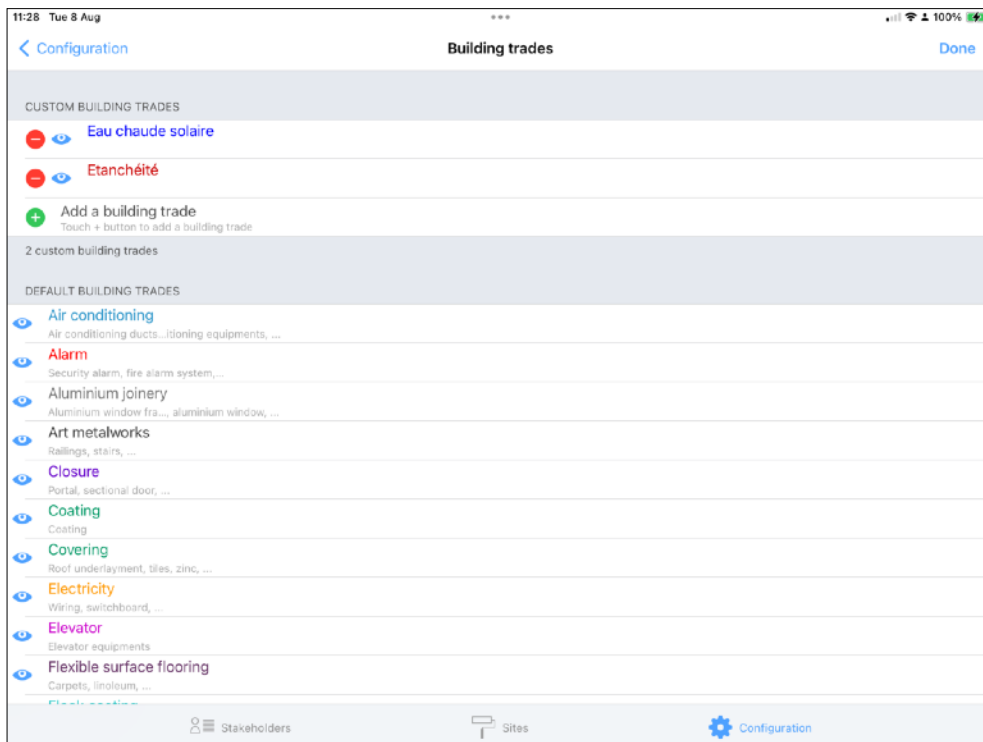
To modify a building trade color, press the color button and pick a color of your choice

Once you finished editing your building trades, press «Save» button to save edits.

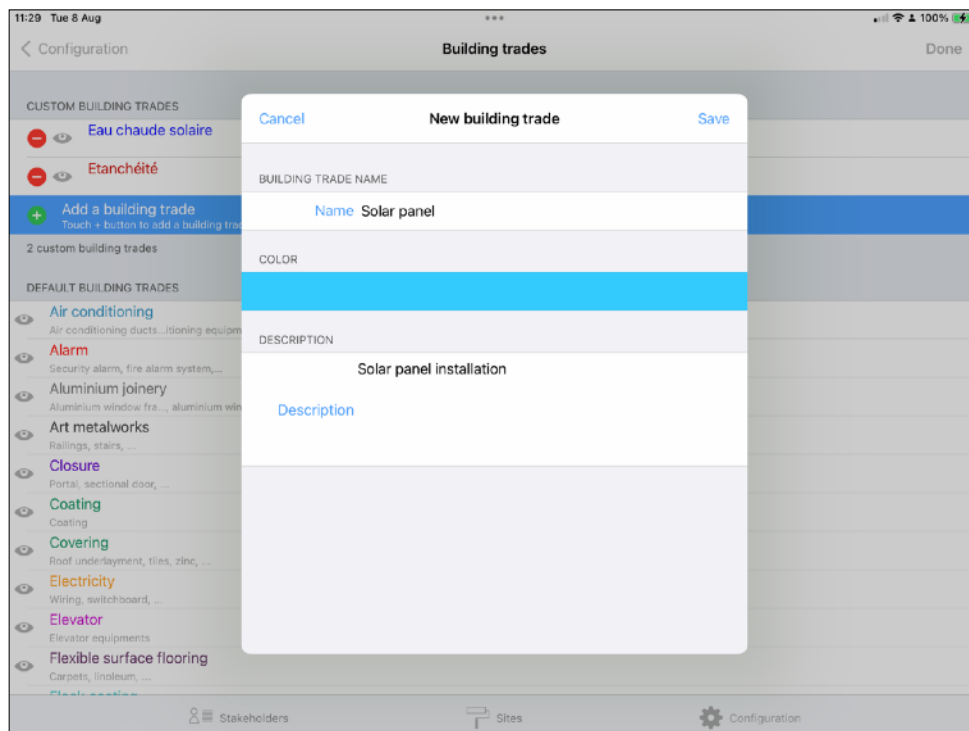
Add a custom building trade

Go to the «Configure building trades» screen and press «Edit» button.

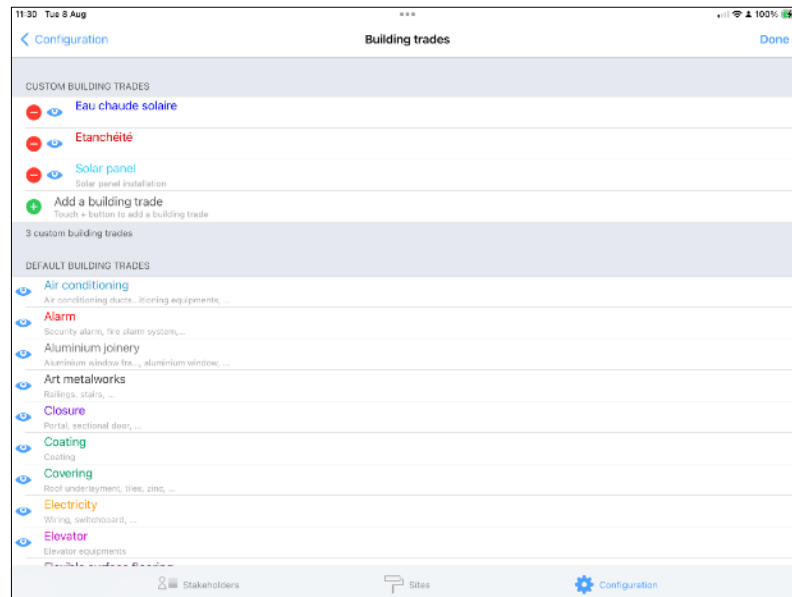
Press + button or «Add new building trade» cell



Fill in the new building trade form and press «Save» button.



Once finished, press the «Ok» button to exit from editing mode.

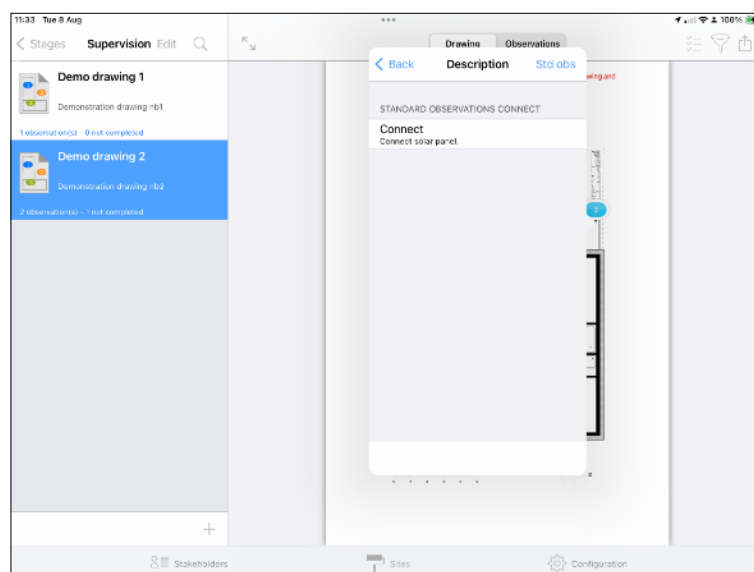


Add a standard observation

You can define an unlimited number of standard observations for each building trades, to speed up data input.

To add a standard observation, go to the building trades list, select a building trade and add a standard observation.

You can show your standard observations when adding, editing an observation on a drawing. In the observation popover, touch the «Desc type» button and select the standard observation to add. The description field will automatically be filled with the standard observation description text.



Export and import default configuration file

Export a configuration file

SiteWorks let you export a configuration file and save the current app configuration letting you duplicate it to your other devices.

A siteworks configuration file contains the following elements:

- Building trades (Name, description, color, visibility)
- Standard descriptions
- Default deadline
- Photo to pdf resolution
- Email options
- Reports content and layout

Dropbox account will not be saved to configuration file for security reasons.

To export a configuration file, go to the «Configuration» tab and touch the export button.

Save or send the generated file (via email, iTunes, Dropbox).

Import a configuration file

In order to import a configuration file, and update or replace the current configuration of the app, from the «Configuration Tab», touch the «Import Configuration» button, select «iTunes» or Dropbox» depending on where your configuration file is stored, select it from the list and touch the «Save» button.

Configuration of the app will be replaced by the data contained in the configuration file.

Regarding observations and standard descriptions, please note that if a newer version is present inside the app, it will be kept and won't be replaced by the one present in the configuration file.