

# Documentation



# SiteWorks

<b>Introduction</b>	<b>5</b>
<b>Stakeholders management</b>	<b>6</b>
Description	6
Import a stakeholder from the iPad's address book	7
Add a stakeholder	8
Modify a stakeholder	8
Merge two stakeholders	8
Delete a stakeholder	9
SiteWorks ID	10
<b>Sites management</b>	<b>11</b>
Description	11
Site creation	11
Define site specific stakeholders and building trades list	12
Import drawings into the app	13
Import from iTunes	13
Import from Dropbox	15
Import from WebDAV server	15
Import from 3rd party cloud service provider	16
Import from an album or from camera	17
Import from Mail™	18
Site stage creation	19
Create a stage	19
Move drawings and observations from a previous building stage	21
Add drawings to a stage	22
Replace original drawing used in an annotated drawing	23
Adding and deleting an observation	25
Add an observation to a drawing	25

Set up an observation	26
<i>Select a building trade</i>	26
<i>Define a deadline</i>	27
<i>Select a stakeholder</i>	28
<i>Add a description</i>	28
<i>Add a photo</i>	28
<i>Annotate a photo</i>	29
<i>Add a remark</i>	30
<i>Set an observation completed</i>	31
<i>Final discharge</i>	32
Move an observation	32
Move observations to another drawing	33
Copy / Paste an observation	33
Delete an observation	35
Filter observations visibility	35
Observations numbering	36
<b>Generate send reports, punch/snag list</b>	<b>38</b>
PDF reports, punch/snag list content	38
CSV reports, punch/snag list content	39
Open a report with a third party app.	40
Send a report, punch/snag list by email (pdf, excel, csv or siteworks)	41
<i>File Name</i>	42
<i>Select Drawings to Include</i>	42
<i>Select Building trades to include</i>	42
Save a report, punch/snag list to your Dropbox	44
Save a report, punch/snag list to a WebDAV server	44
Save a report, punch/snag list to a 3dr party cloud service providers (iCloud Drive, One Drive, Google Drive, Box, ...)	44

Save a report, punch/snag list via AirDrop	46
Send a report, punch/snag list to iTunes	47
<b>Backup, Share, Import a siteworks file</b>	<b>48</b>
Import a siteworks file from iTunes	48
Import a new site	49
Merge or replace an existing site	50
<i>Merging a siteworks file</i>	50
<i>Replacing a siteworks file</i>	51
Import a siteworks file from Dropbox	51
Import a siteworks file from a WebDAV server	51
Import a siteworks file from Mail	51
<b>Configure the application</b>	<b>52</b>
Configure building trades	52
Modify building trades	52
Add a custom building trade	54
Add a standard observation	55
Export and import default configuration file	56
Export a configuration file	56
Import a configuration file	56



# Introduction

SiteWorks is an iPad, iPhone, iPod Touch app designed for siteworks supervision. It allows you to organize your sites, drawings, stakeholders and observations easily and efficiently, to share and save punch/snag lists, reports, in PDF Excel or CSV format and to share your site files between multiple iPad, iPhone, iPod Touch.

This documents describes in detail how to use the main functionalities of the application, from data import to report, punch/snag list generation, app configuration, etc.

# Stakeholders management

## Description

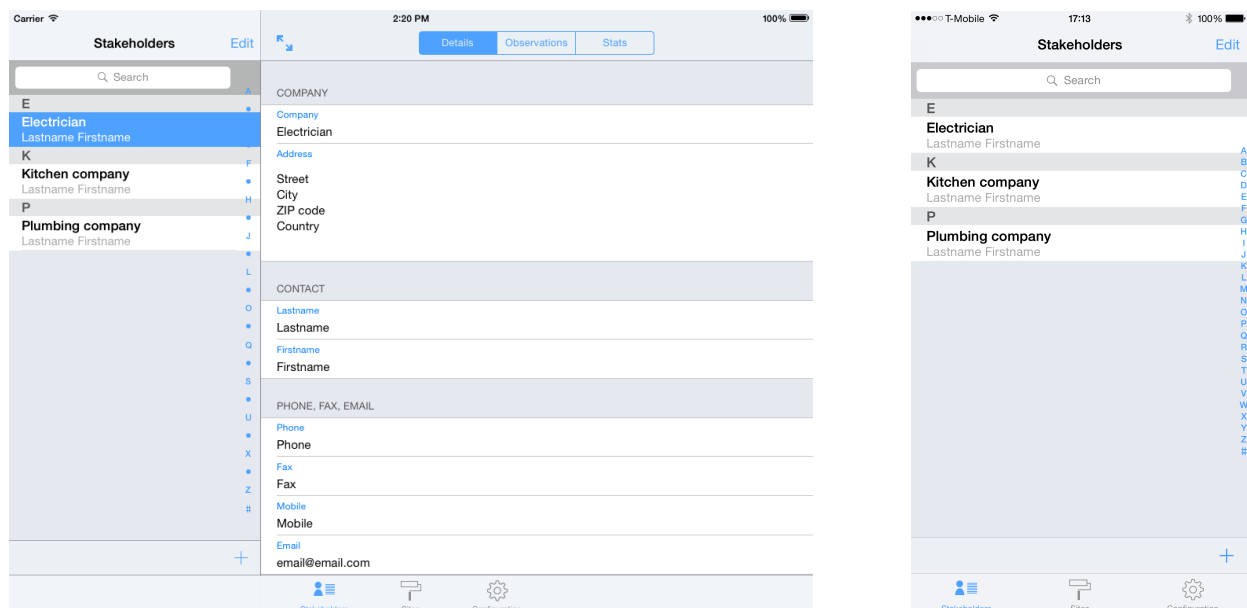
SiteWorks is fully integrated with iPad's/iPhone's Contacts app. If you add or modify a stakeholder inside the app, it will be added or updated inside your iPad's/iPhone's Contacts app. If a contact is modified inside the contacts app, changes will be automatically reflected inside SiteWorks, without any manipulation.

Inside the app, a stakeholder is a company, a contact in relation to one or more sites. in most cases, those stakeholders will be contractors and subcontractors companies working on your sites.

Stakeholders are managed from the «Stakeholders» tab accessible from the bottom of the application screen.

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.

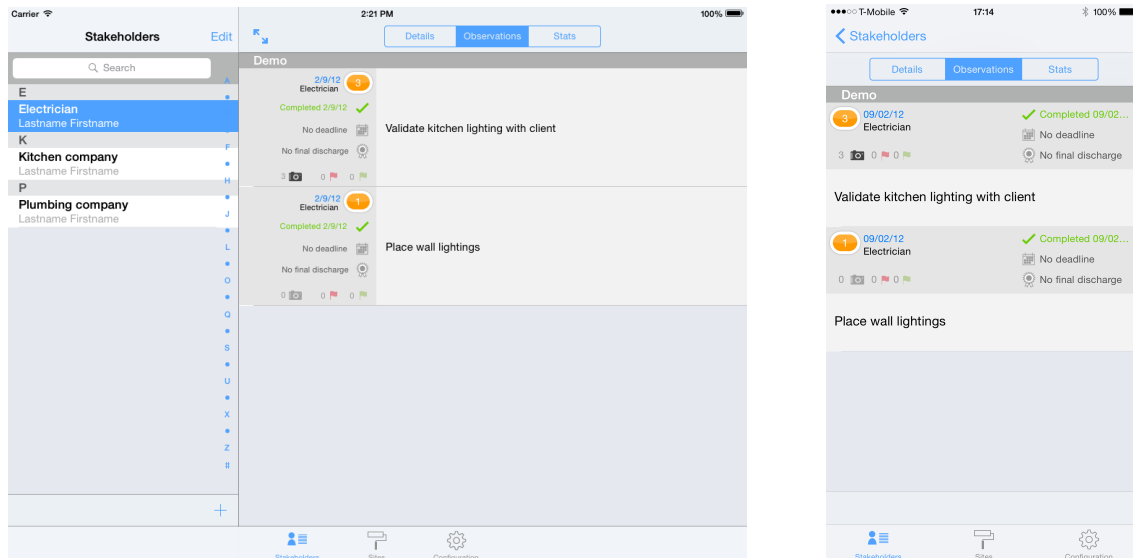


## On iPhone, iPod Touch

«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. Linked observations gives you access to observations attributed to the selected stakeholder.



## Import a stakeholder from the iPad's address book



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 which is not present in your address book, 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's address book, 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.

Your modifications (example: phone number update) will be automatically synchronized with your iPad's address book.

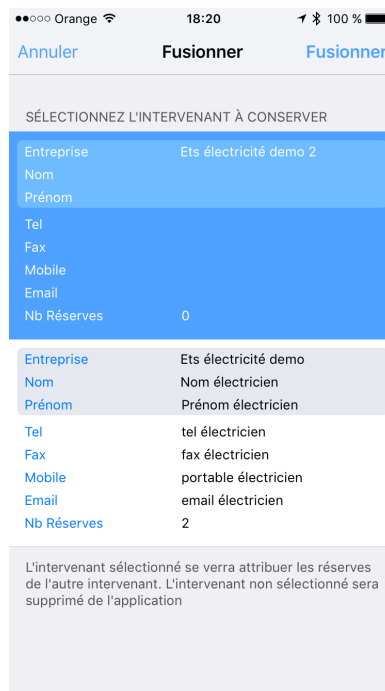
Reciprocally, if you modify a contact from the iPads «Contacts» app, the changes will be automatically synchronized with SiteWorks.

## **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 oc Cancel button on the alert box shown on screen.

When you remove a stakeholder, it will not remove the associated contact from your device's address book.

It's siteworks id (see below) will also remain to avoid contact duplication when a further import 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)**.

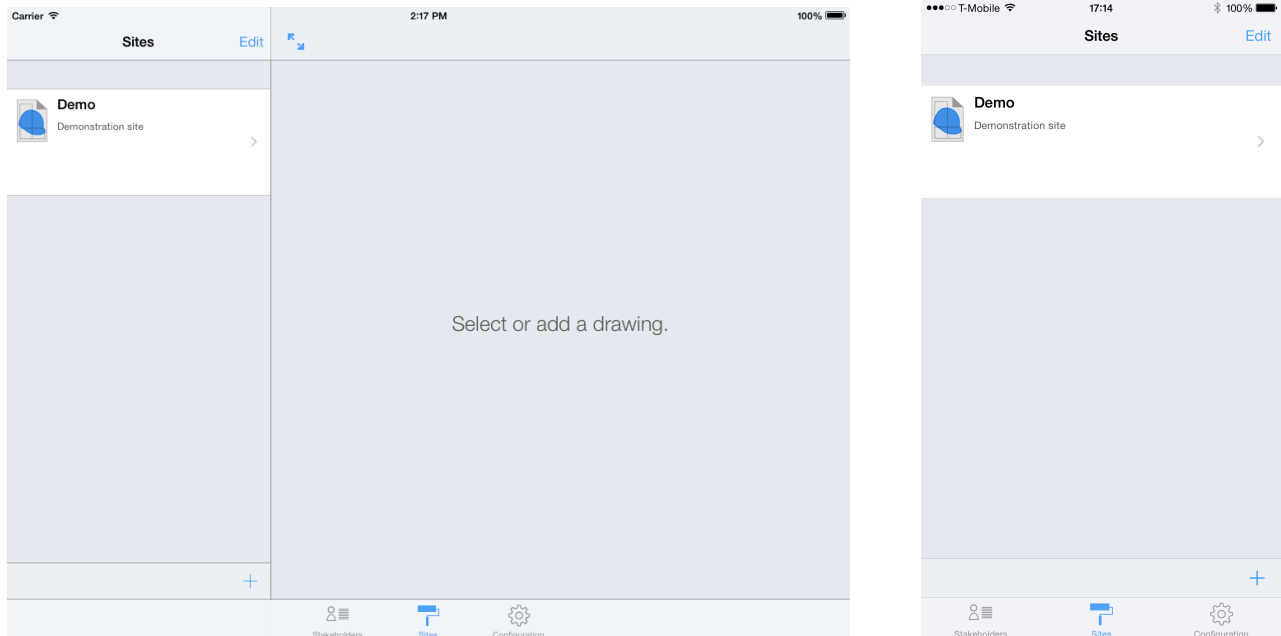
It appears in the siteworks field inside the «Contacts» app.

**You should not remove or alter this field** which allows the application to link a stakeholder inside siteworks app to a contact inside the iPad's addressbook 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

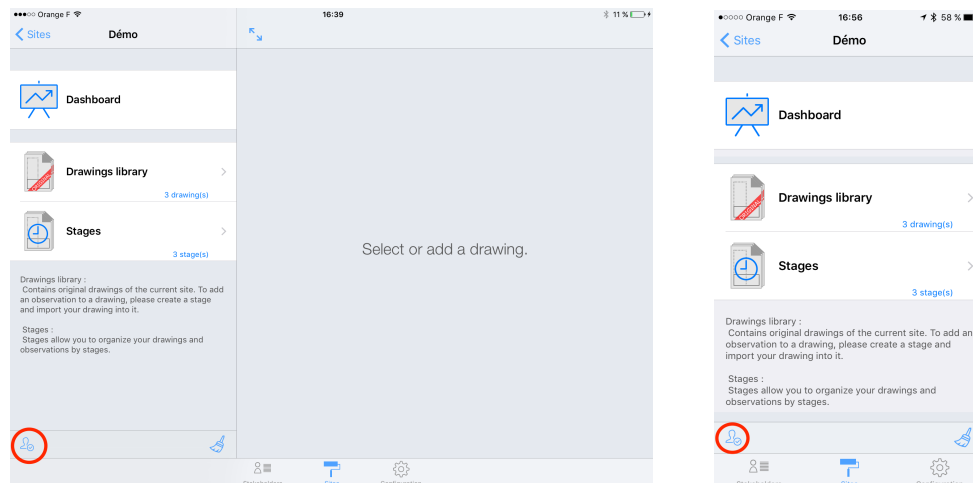
Each site contains a «drawing library» that will contain all the original pdf drawings you will import and a «stage» folder in which you will be able to create an unlimited number of subfolders to organize your drawings and observations as you wish to (by date, follow-up category, area, etc).

## Define site specific stakeholders and building trades list

SiteWorks 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.

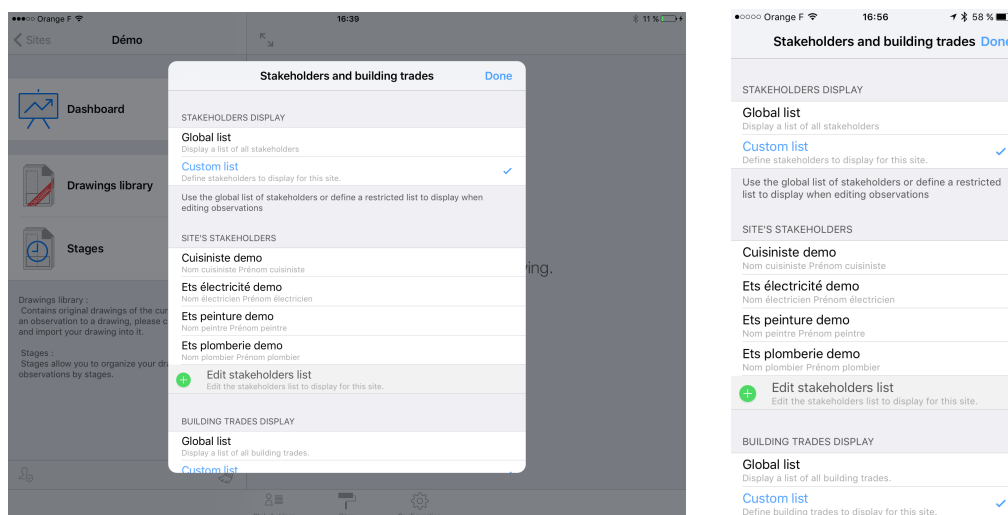


In the editing window appearing, in the stakeholder section, select « Custom list » to use a specific list of stakeholders for this site.

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 iTunes
- from Mail
- from Dropbox
- from iCloud Drive
- from a WebDAV server
- from any services that provides an app compatible with iOS8 document provider

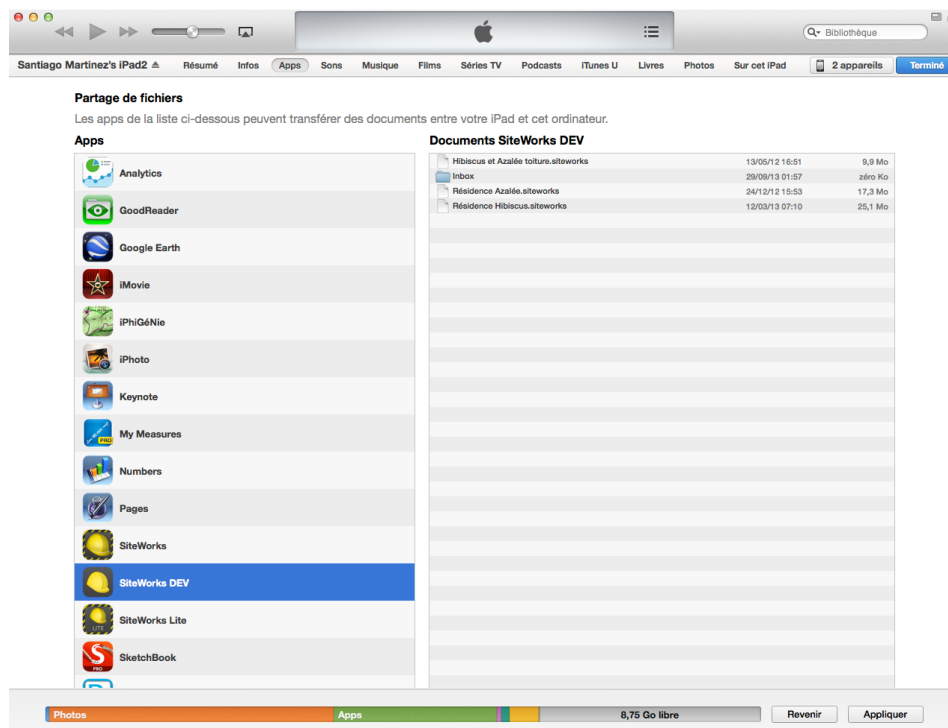
SiteWorks uses PDF format drawings but offers you the ability to import images from your photo albums, your Dropbox or WebDAV account or from the camera and convert them to PDF format.

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.

## Import from iTunes

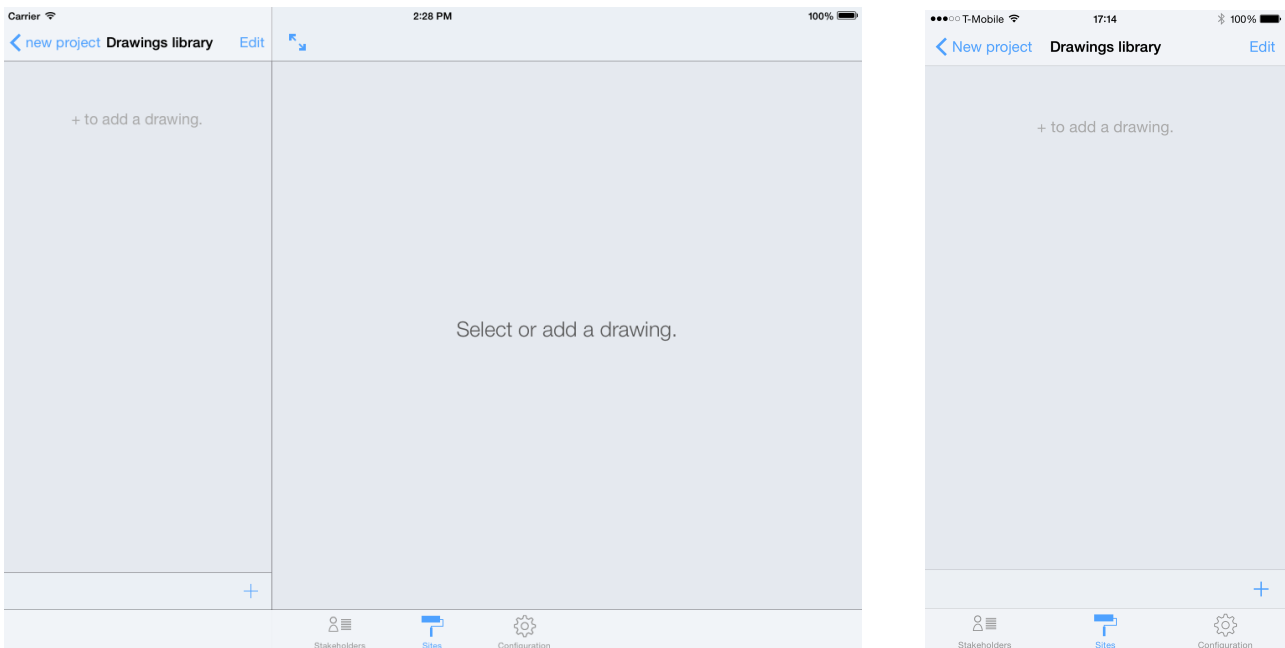
- Plug your iPad, iPhone, iPod Touch into your computer and start iTunes.
- Select your iPad in «Devices» section in iTunes left column.
- Go into «Apps» tab
- In «File sharing» section select «SiteWorks» app
- Press «Add...» button
- Select the drawings to import in pdf format and press «Open» button.



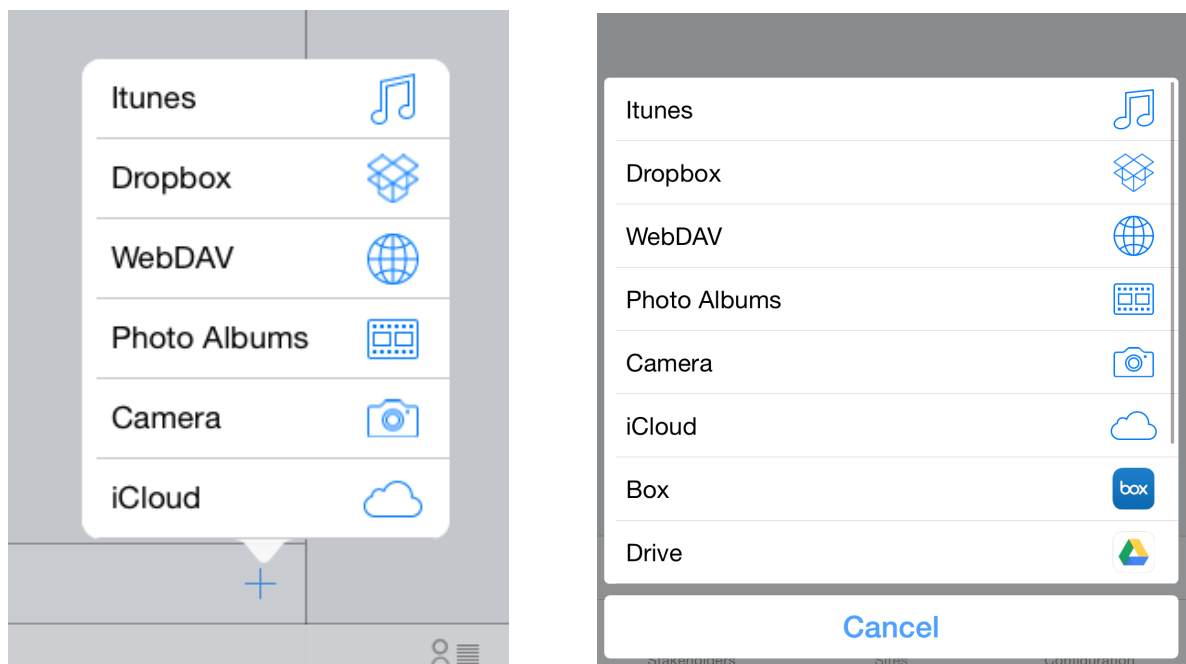
Once your drawings have been imported into iTunes and synchronized to your iPad, start SiteWorks.

Go into «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 Dropbox**

Form more informations 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 3rd party cloud service provider

SiteWorks is compatible with iOS document provider functionality.

This means that every 3rd party cloud service provider supporting this functionality can be used within SiteWorks.

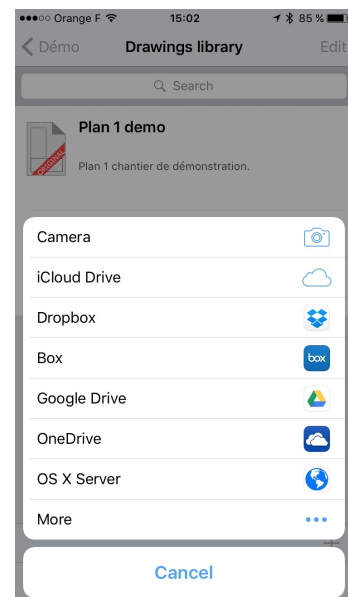
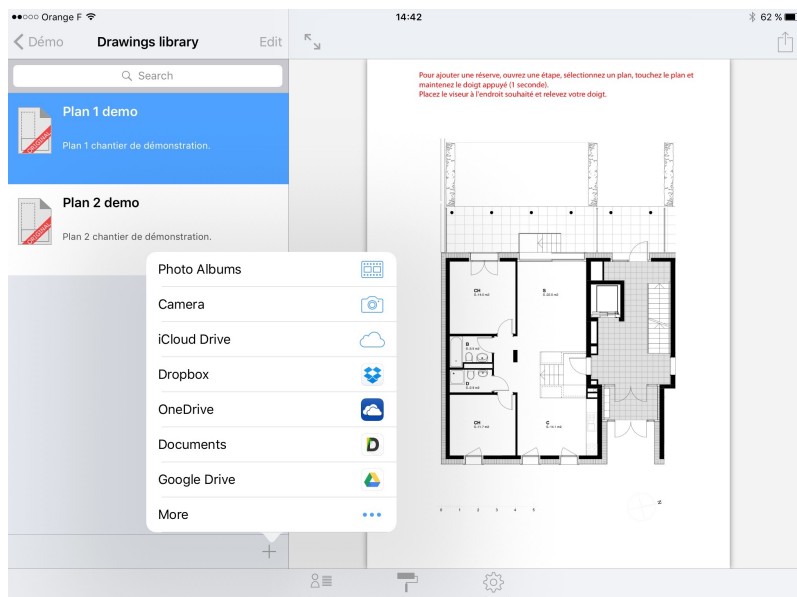
This includes for example Google Drive, Microsoft One Drive or Box cloud service providers.

In order to access your 3rd party cloud service within SiteWorks, you simply have to download and setup the service app from the appStore (for example the Google Drive app).

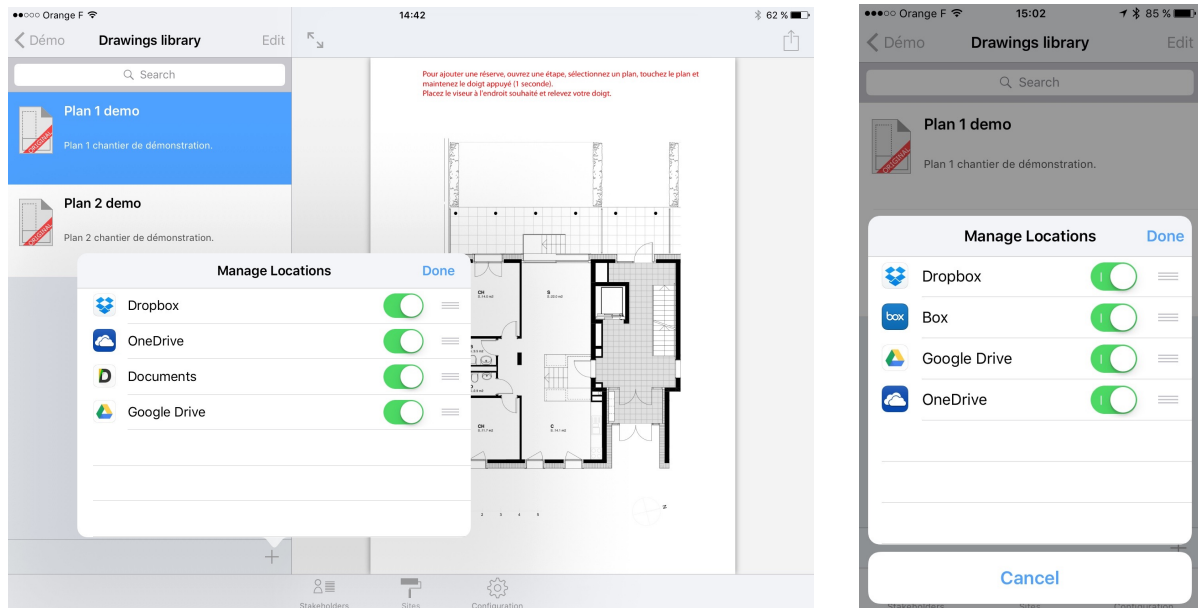
Once the service app is installed and set up, you can use it within SiteWorks immediately.

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 button corresponding to your 3rd party service provider.



If your 3rd party service doesn't appear on the list, touch the « More » button to add it to the list.



Once you touched the button of your 3rd party cloud service, browse to the folder containing your original pdf drawings select it and download it.

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 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™

You can import an original drawing from Mail app.

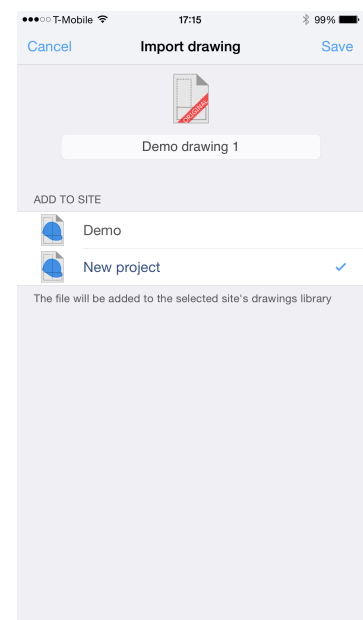
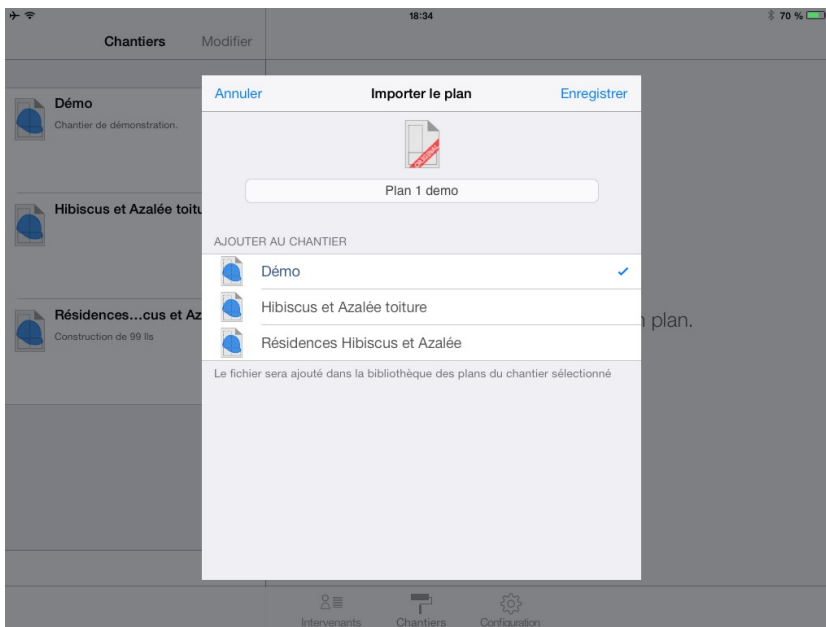
Start Mail app and open the email containing your pdf drawing.

Do a long press touch on your drawing and touch the «Open with ...» 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

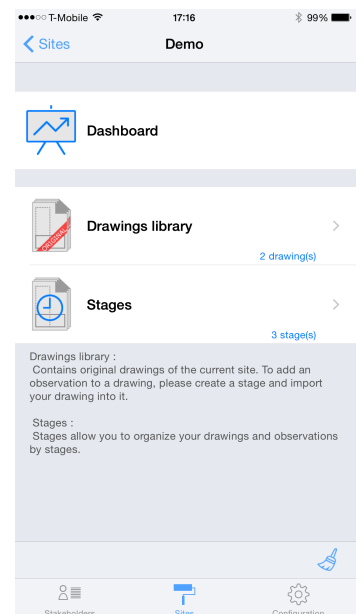
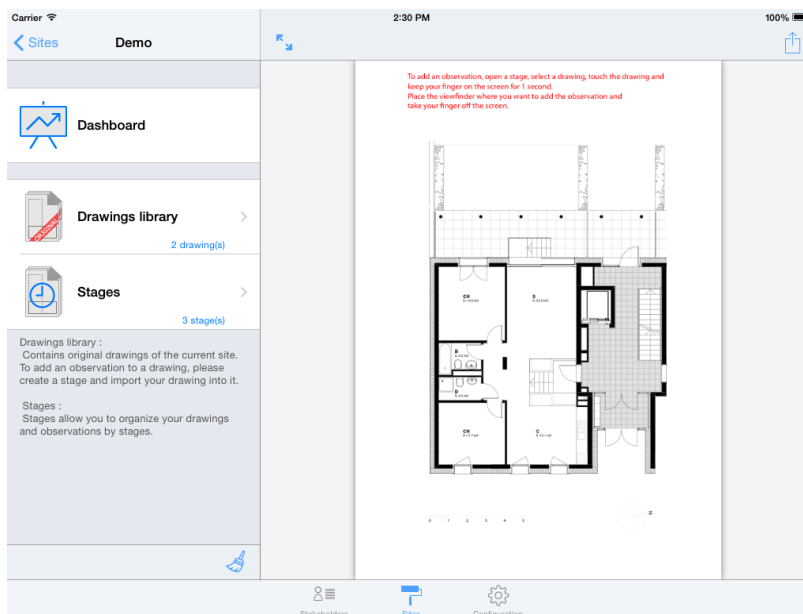
Site stages let you organize your sites observations logically.

Exemple of stages set up:

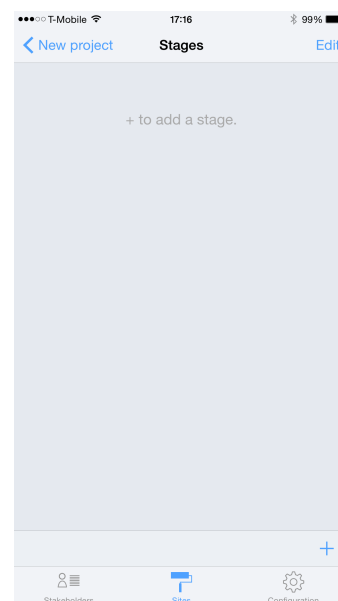
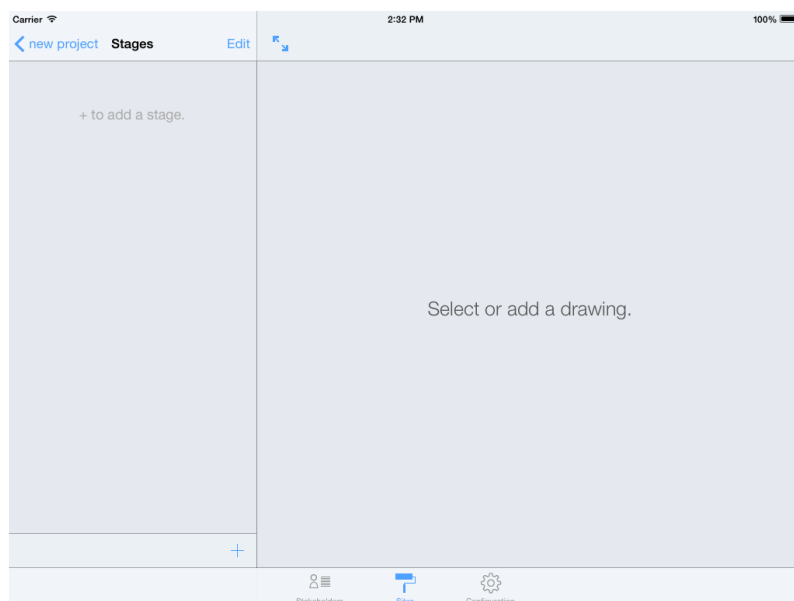
- One «Preparation» stage to handle site preparation drawings and observations.
- One «Supervision» stage to follow siteworks progress.
- One «Handover» stage to handle site handover.

## Create a stage

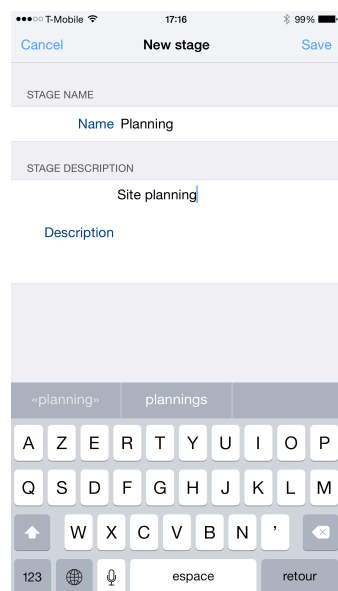
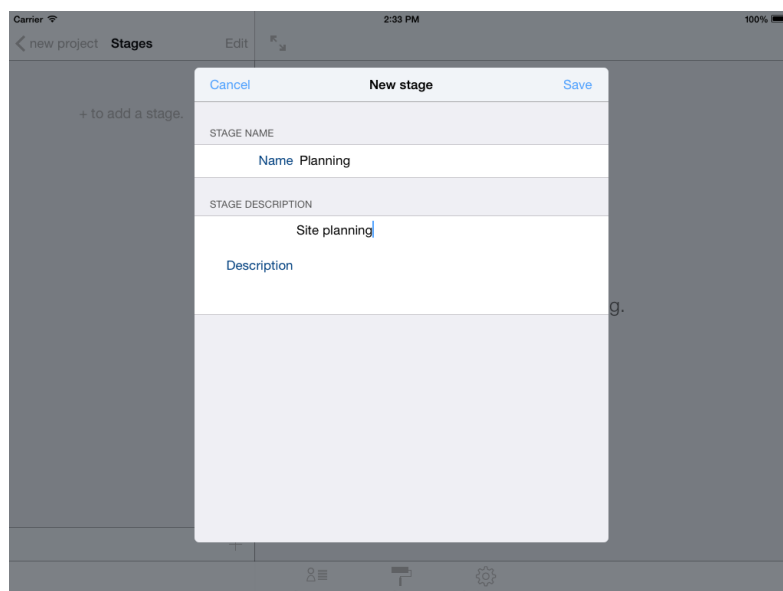
Create a site, import your original drawings, select the site (see above) and press the «Stages» button.



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

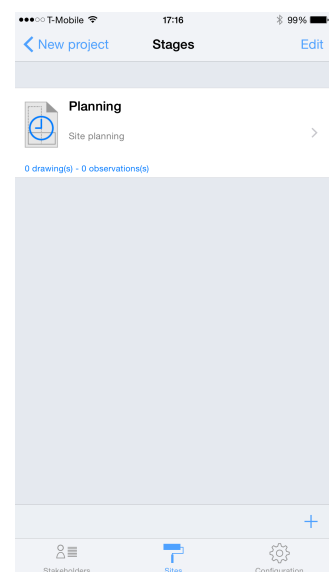
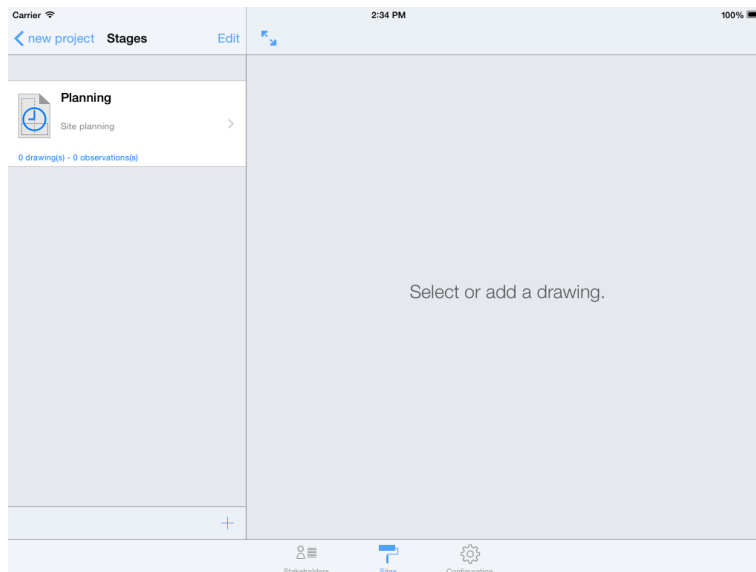


Give the stage a name and description and press the «Save» button.





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

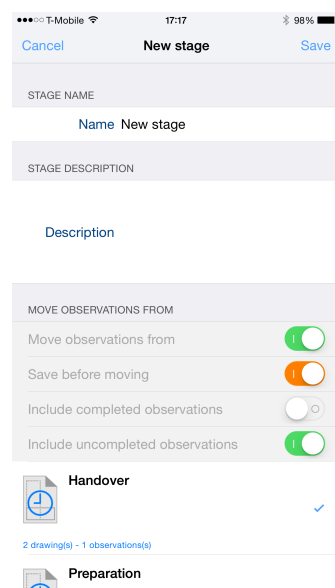
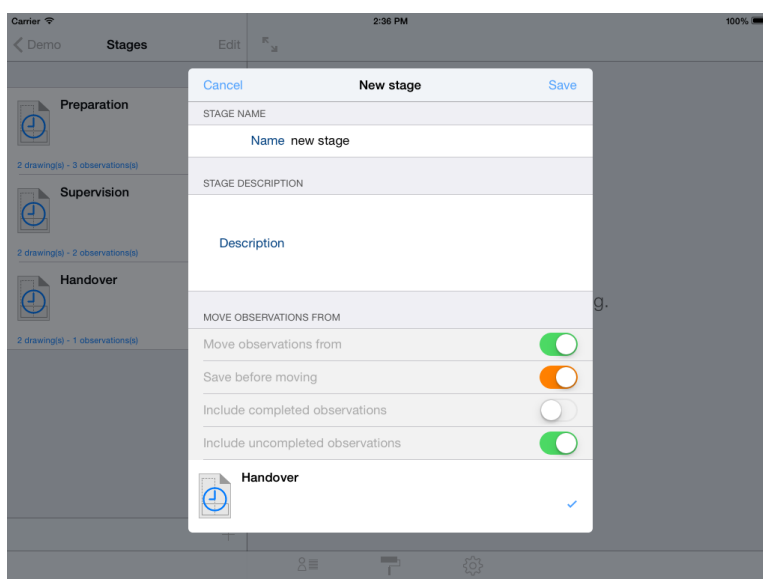
When adding a new building stage, you can move drawings and observations present in one or multiple previously created building stages, in order to continue their follow up.

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.

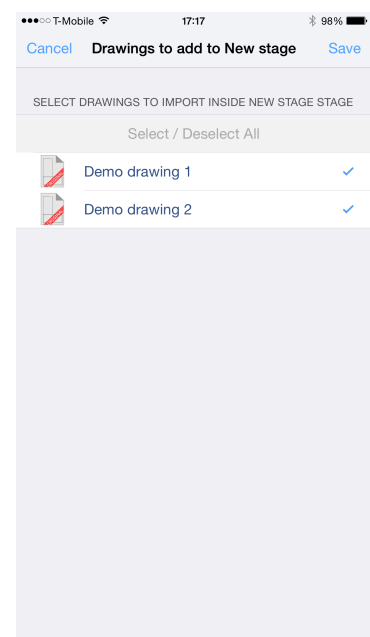
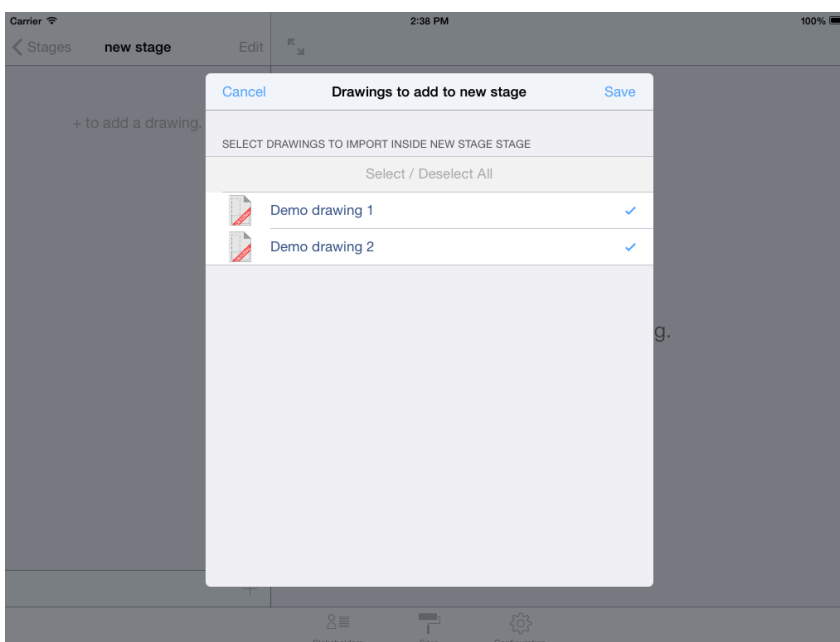


## Add drawings to a stage

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

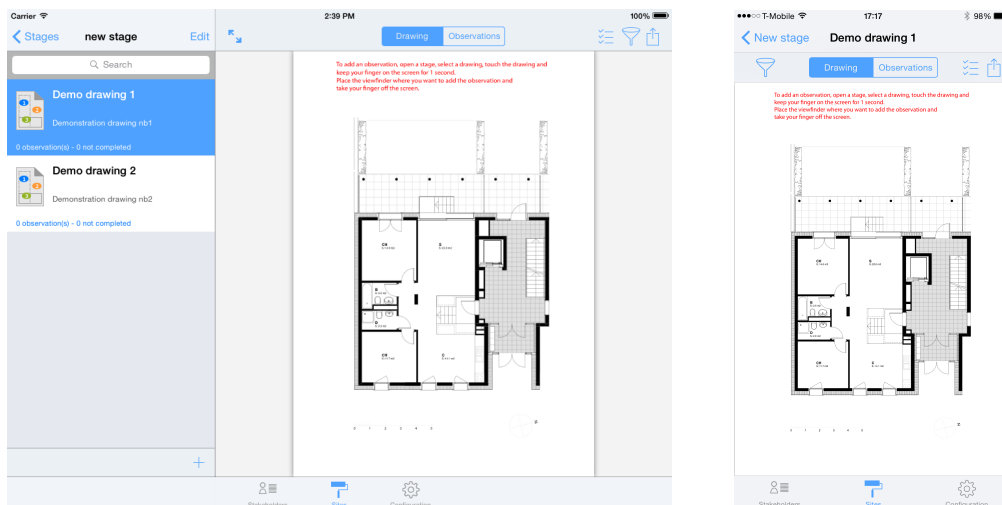
To add editable drawings, press the + button at the bottom of the stage drawings list, the list of your original drawings will appear on screen.

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

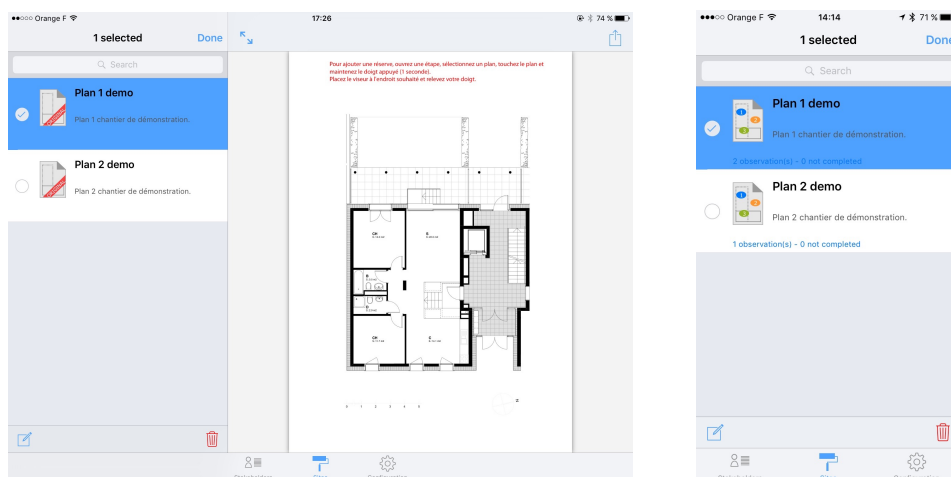
SiteWorks lets you replace the original drawing used in any annotated drawing in case it has been updated.

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 12).

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

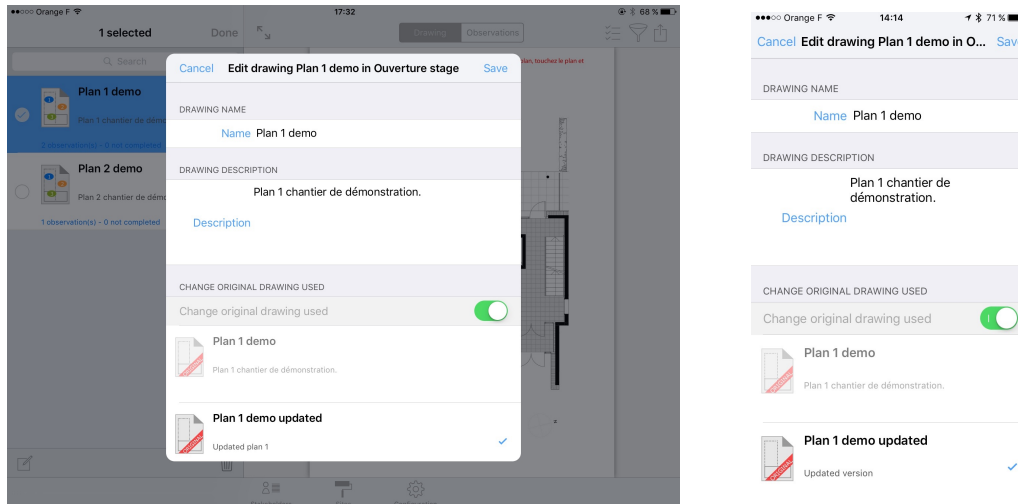
At the top of the stage annotated drawings list touch the « Edit » button, select the annotated drawing to update and touch the pencil button at the bottom of the list.



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 an observation

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.



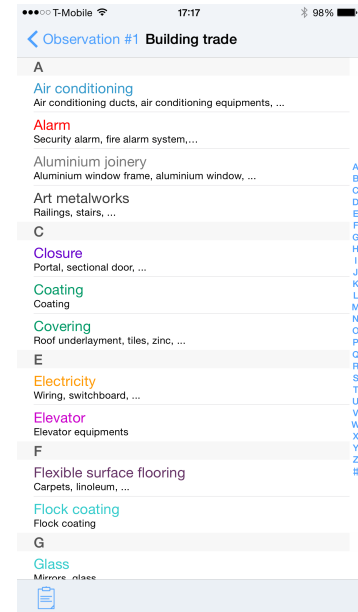
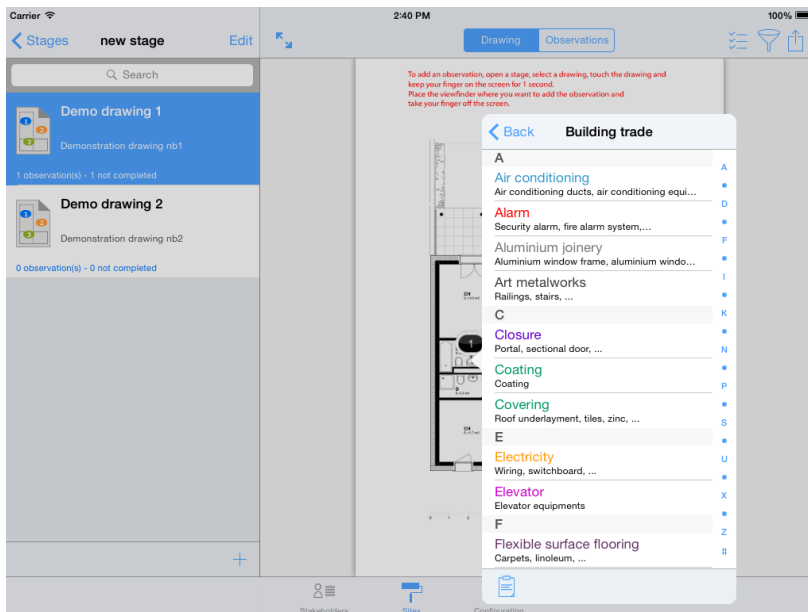
Once the center of the viewfinder is where you want to place your observation, take your finger off the screen.

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

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

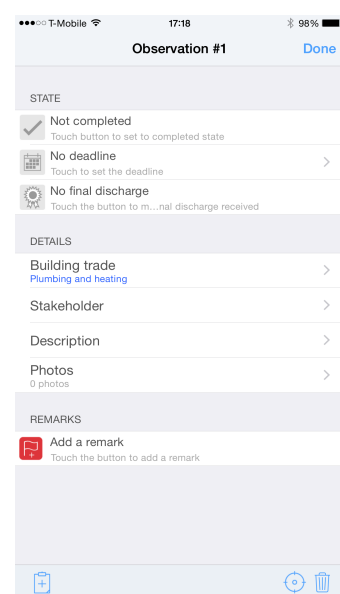
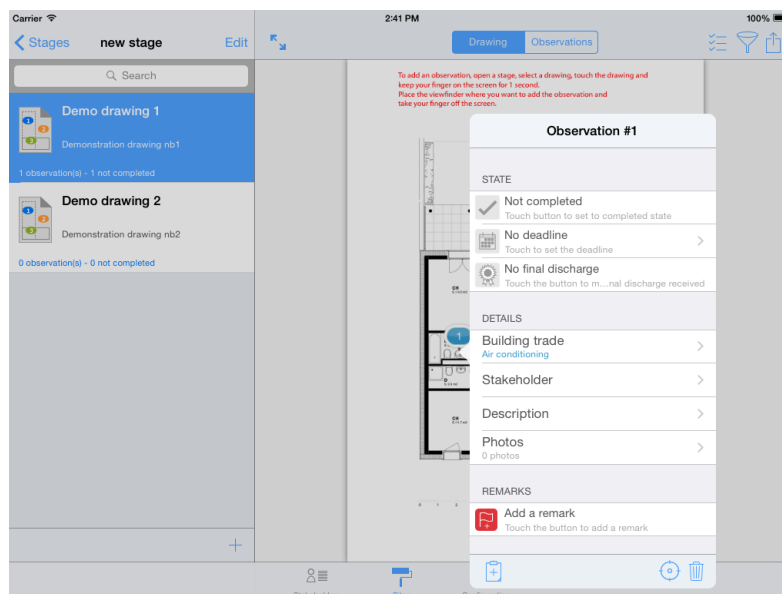


(Visible building trades of this list are configurable in the «Configure» tab of the app.).

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

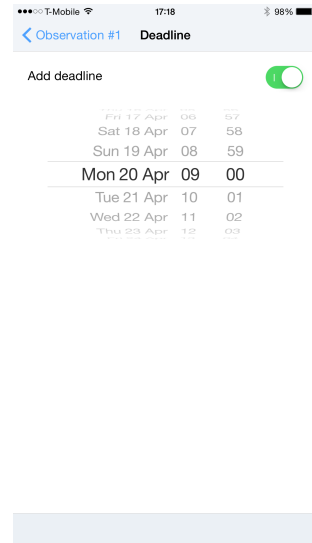
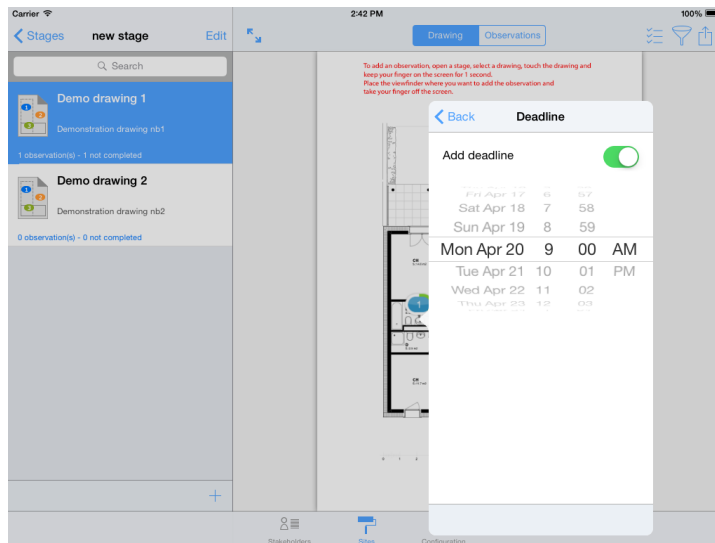
You can define a deadline for each observation.

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.

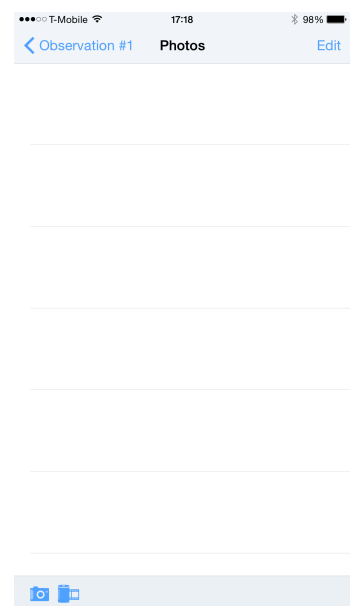
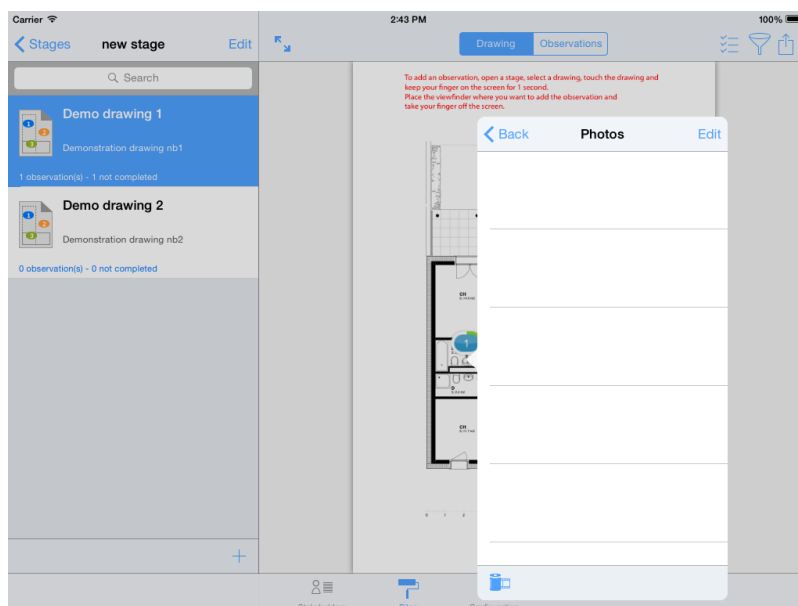
## Add a description

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».

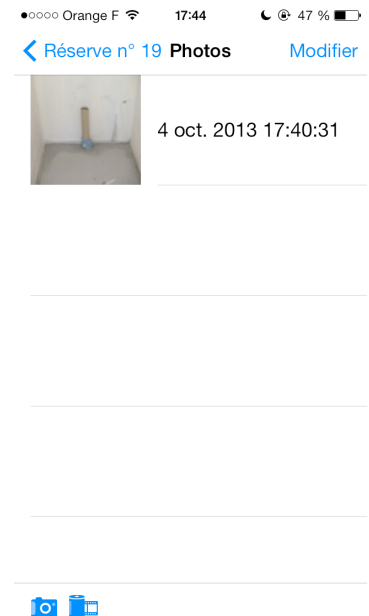
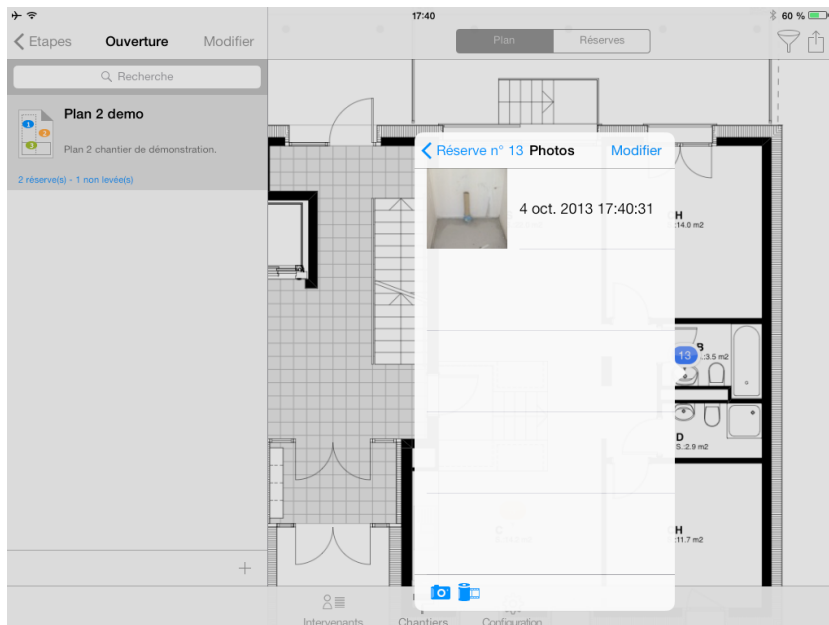
## Add a photo

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.



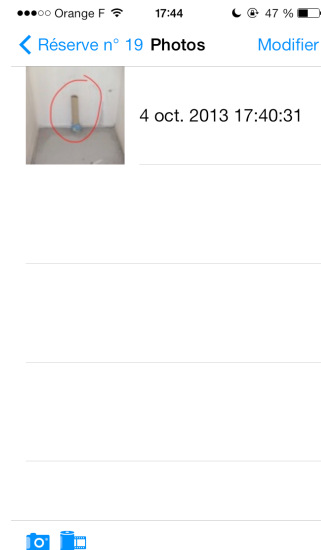


Once your picture shot or chosen from the library, it will appear in the photos list. You can select it to display and zoom it.  
To delete a photo, press the «Edit» button, press the «No entry» sign and press «delete» button.



## 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.

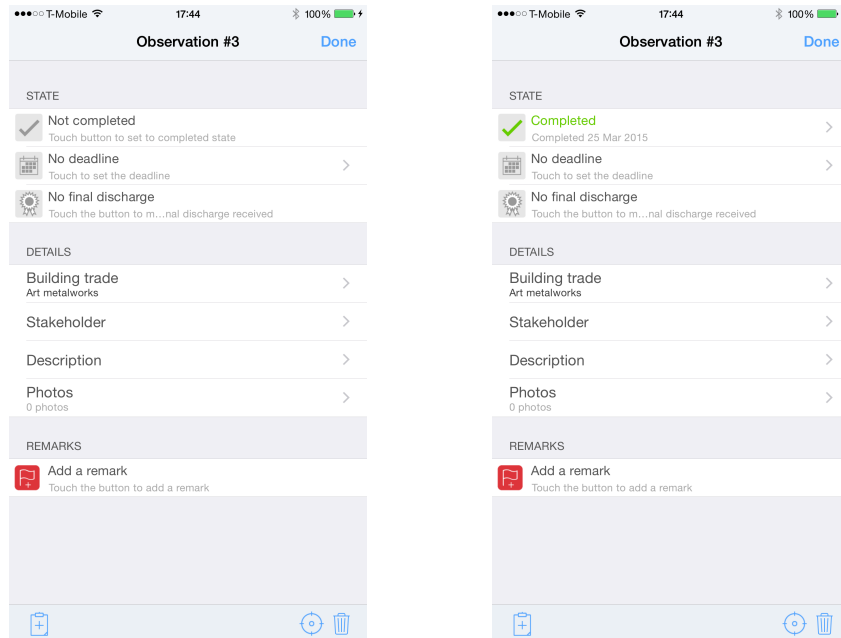
To add a remark, press the «Add remark» cell and enter your remark content.

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.

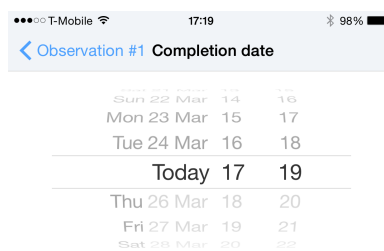
## Set an observation completed

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.

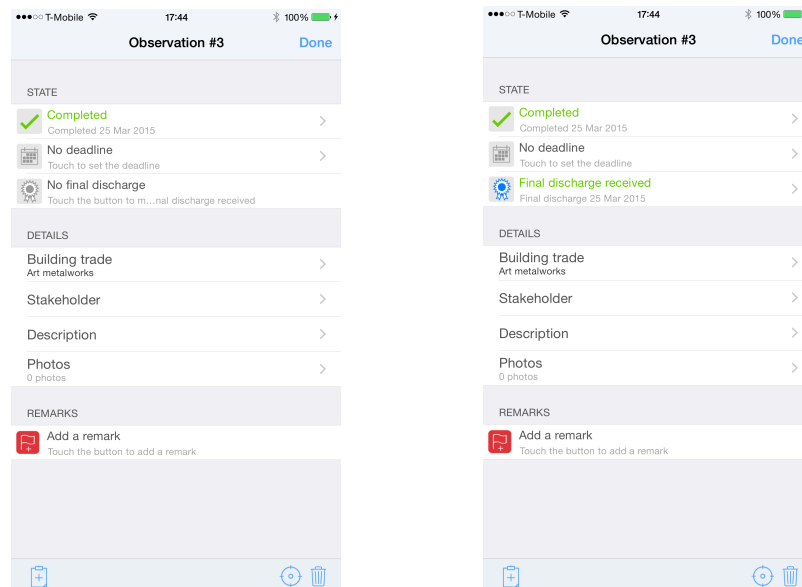
You can change it manually by pressing the «Completed» cell. A date picker will be pushed on screen and let you pick a date and time.



## 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)



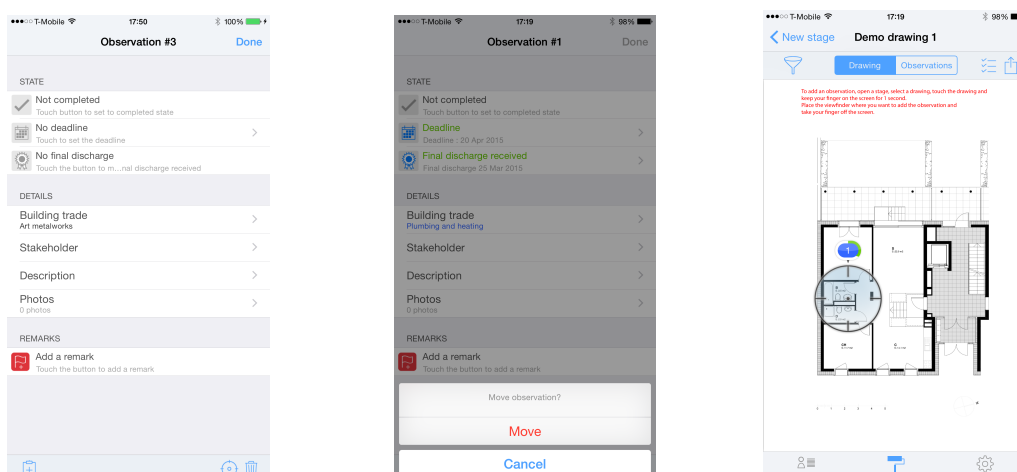
The final discharge receipt date is automatically set when changing the state to received.

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

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.

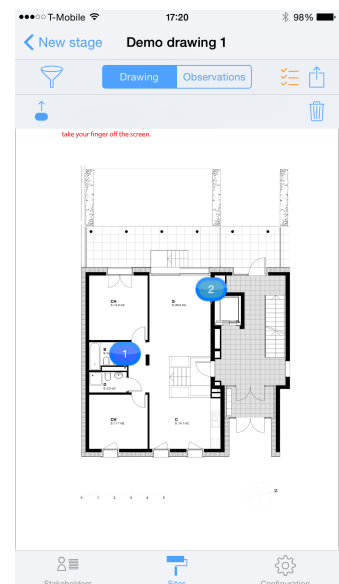
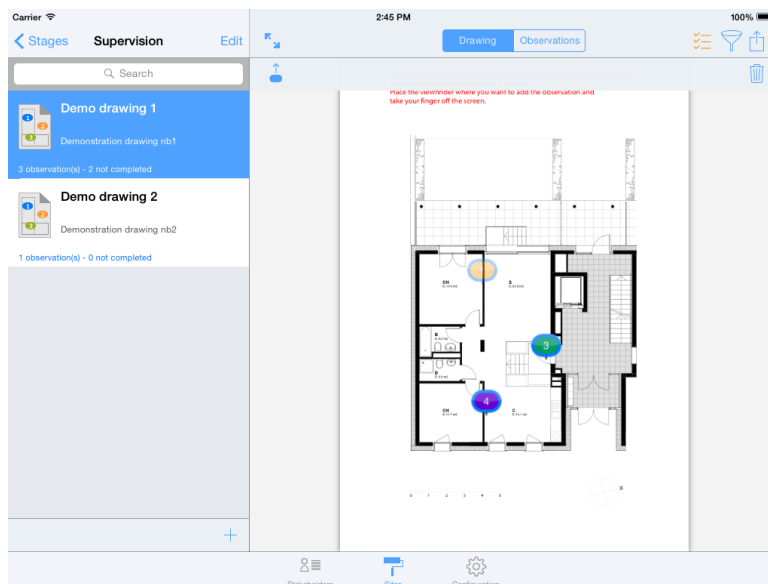



## Move observations to another drawing

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.

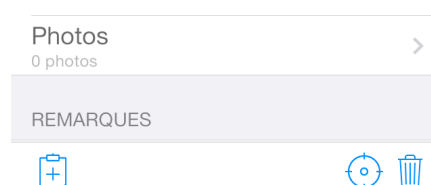
Touch the OK button to proceed.

*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.

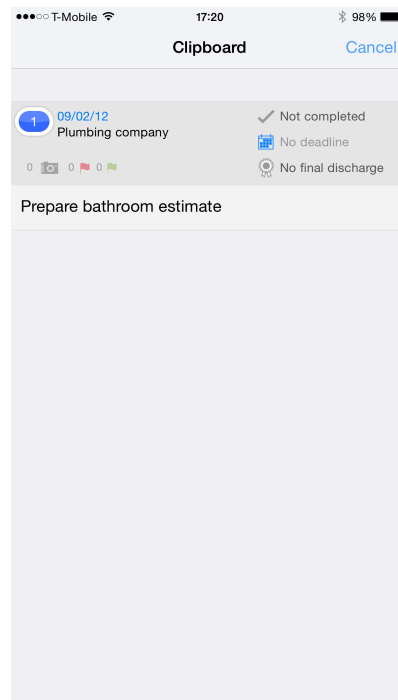
To copy an observation, touch the clipboard button with a + sign at the bottom left hand side of the observation's edit window.



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.

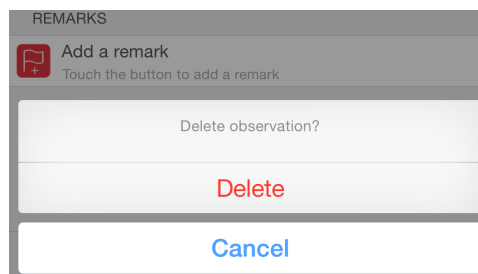



Select the observation you want to paste from the clipboard. All informations from the copied observation will be paste into the new one (building trade, stakeholder, description, images, remarks, ...).



## 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.*

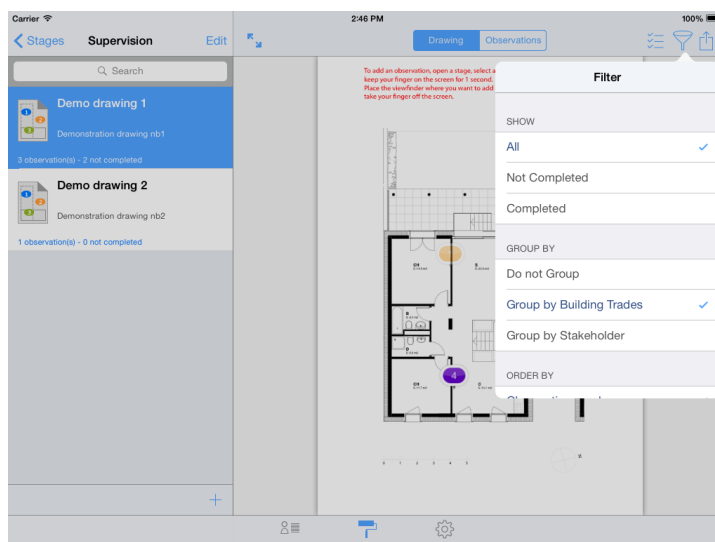
## Filter observations visibility

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.



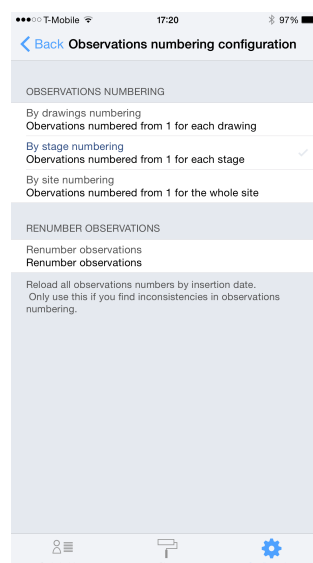
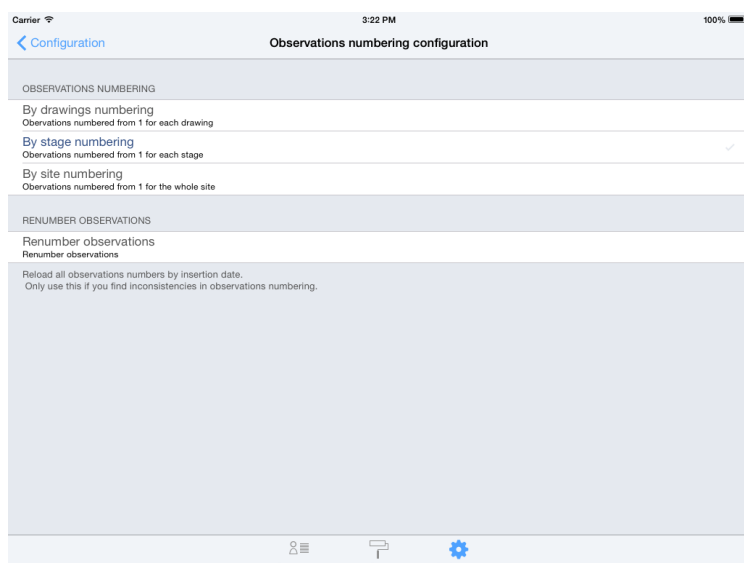
## Observations numbering

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

You can modify this behaviour 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.

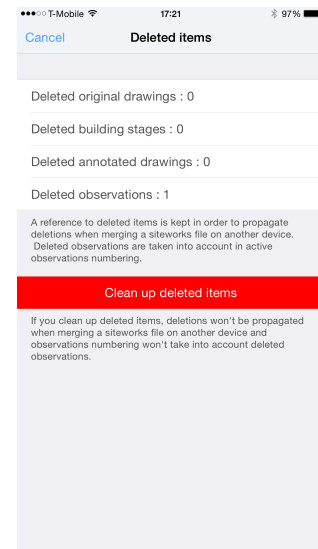
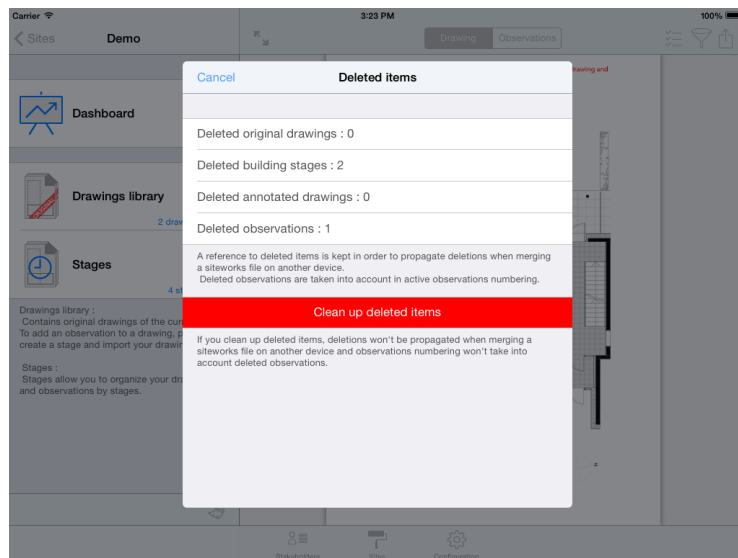
Those numbering options can be edited at all time and new numbering will be updated instantly.



**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, Dropbox or via iTunes.

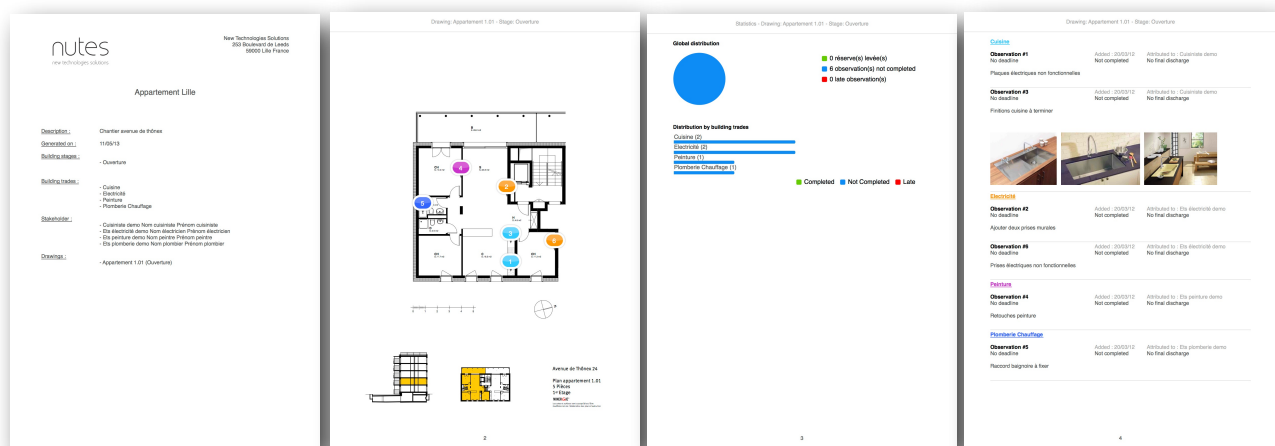
Reports can be generated for a single drawing, a single stage or the entire site.

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 frontpage,
- 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 punc/snag lists, report data with all your compatible softwares.

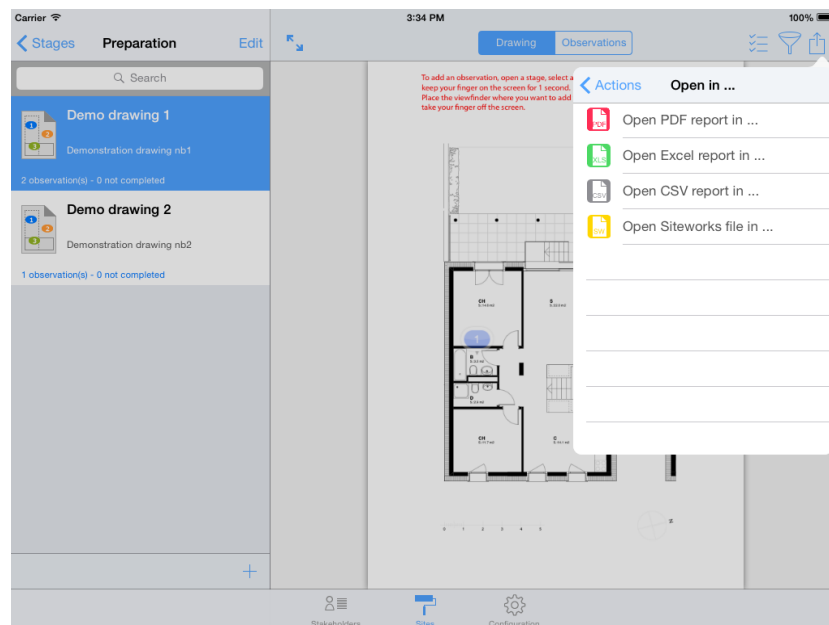
You can configure the data separators and text encodings into the «Configuration» tab.

## Open a report with a third party app.

SiteWorks let you generate and open a report in a thirdparty 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.

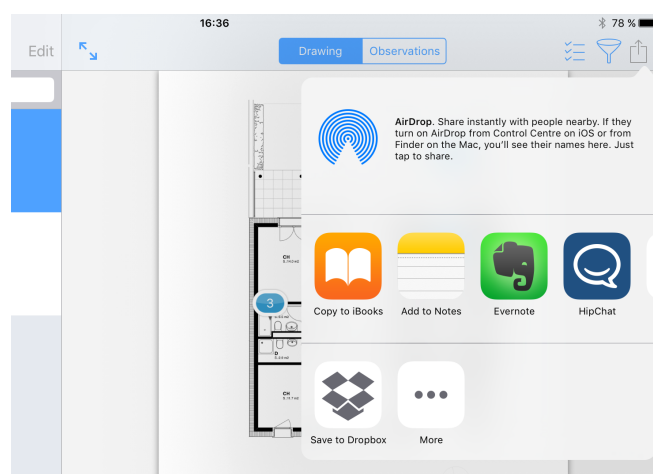
Touch the «Action button» in the top left hand side of the window and select «Open in ...»



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.

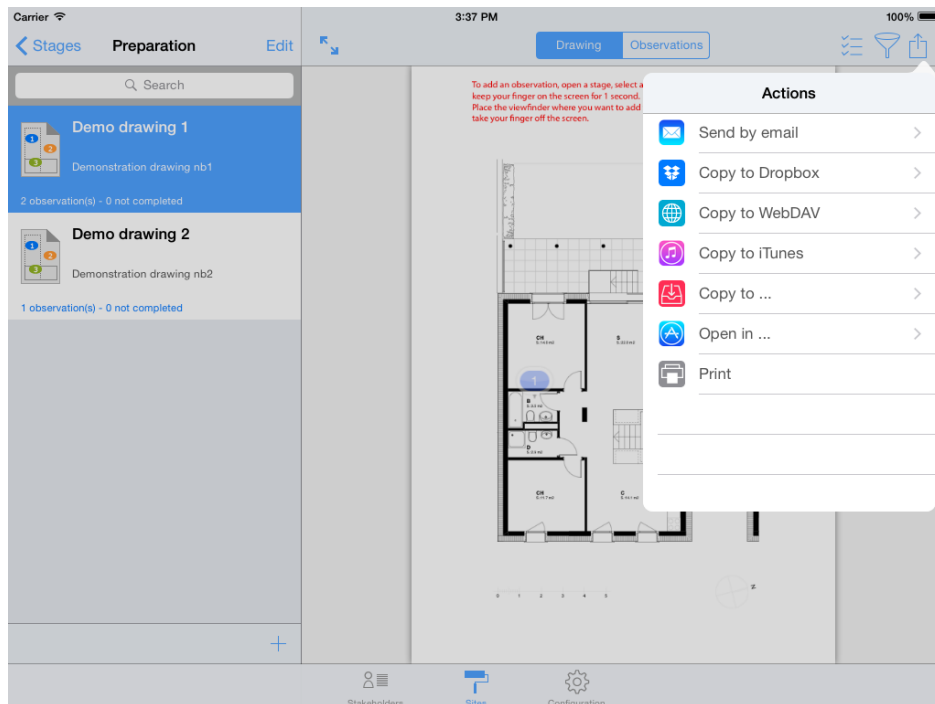
Select the app of your choice and the app will launch and show your report.



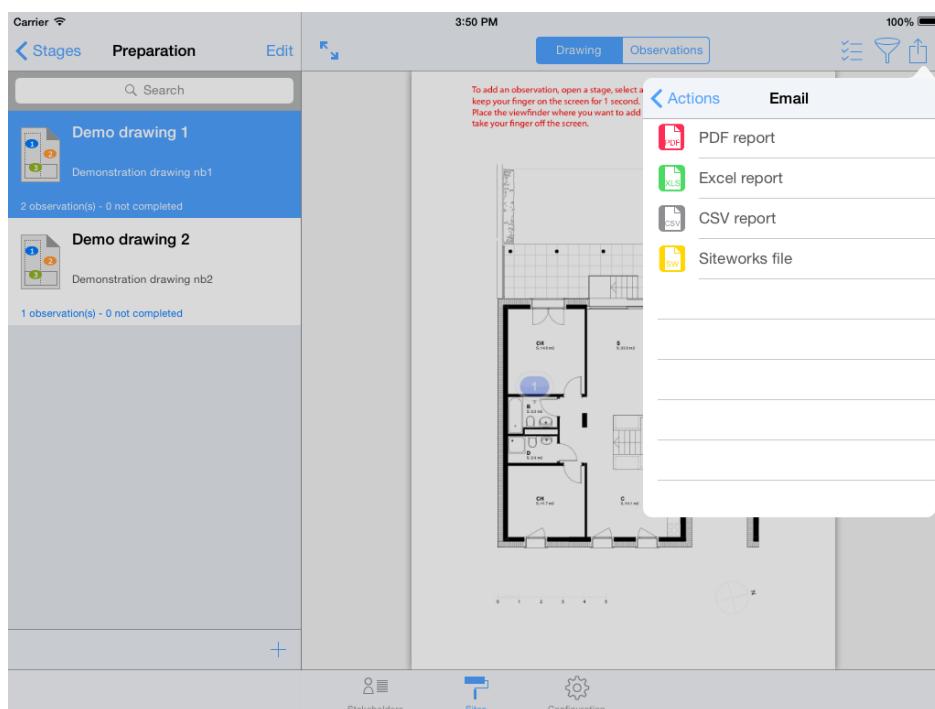
## Send a report, punch/snag list by email (pdf, excel, csv or siteworks)

Go into a site stage and select a drawing.

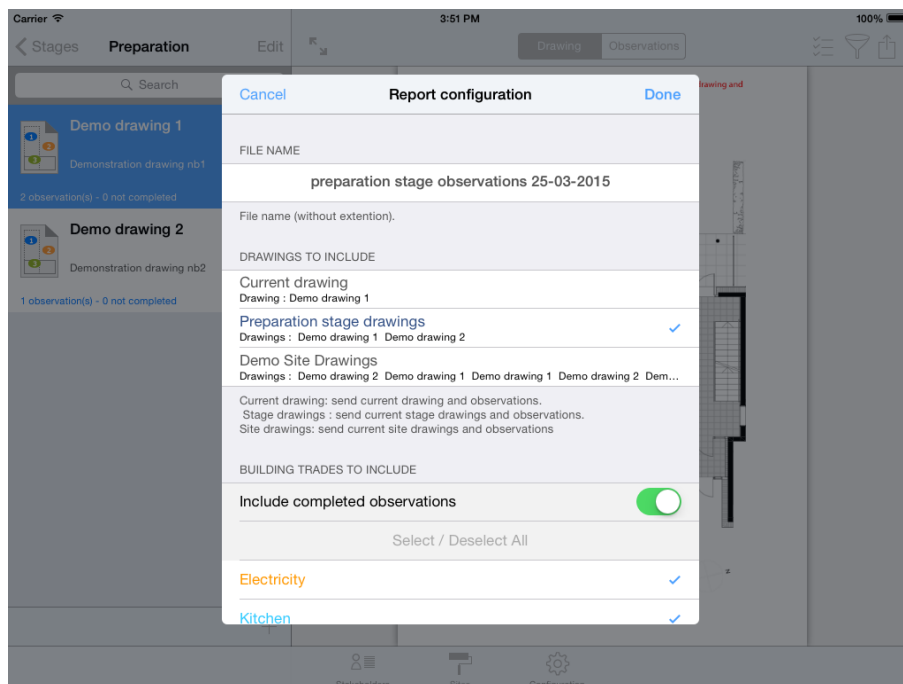
Press the Action button at the top right corner of the app screen and select «Send by email»



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

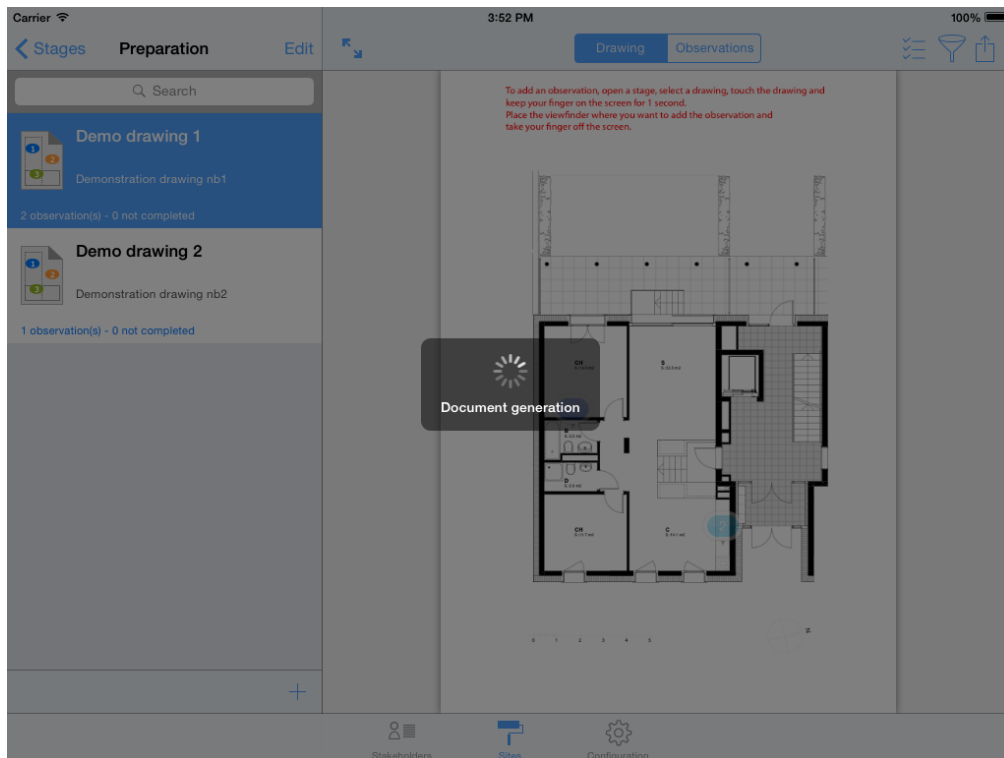
- Select «Current drawing» to generate a report for the current drawing,
- Select «Drawings of stage Stage\_name» to generate a report containing drawings and observations contained in the current stage,
- Select «Drawings of site Site\_name» to generate a report containing drawings and observations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

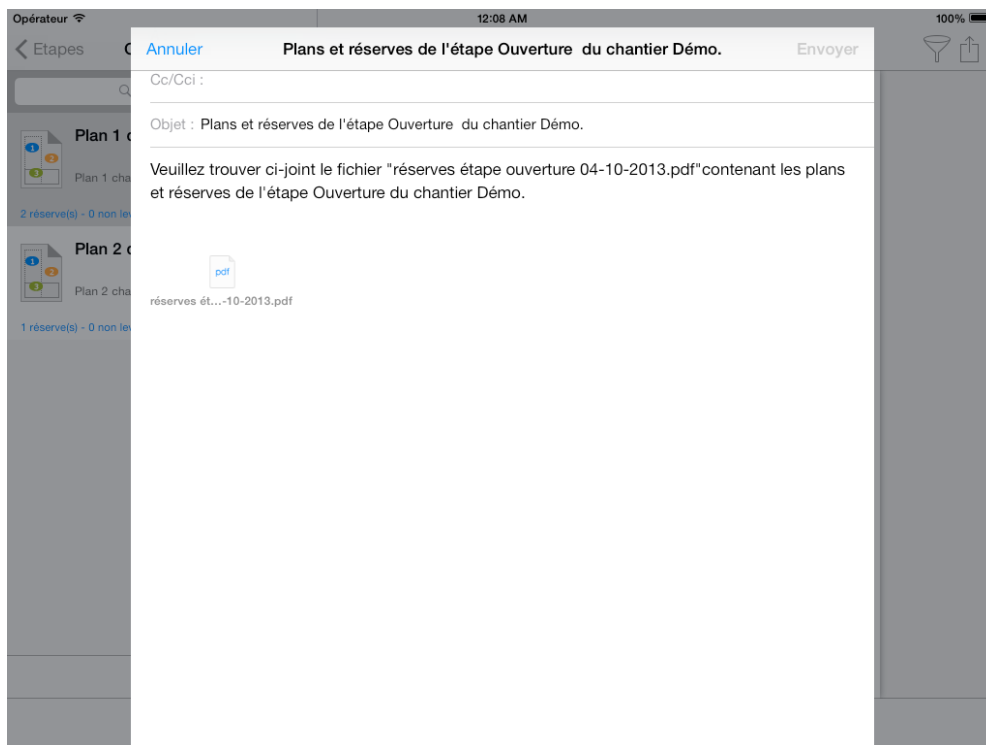
Select building trades you want to include in your report and switch on «Include completed observations» if you want those to appear in your report, then press «Ok» button.

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, punch/snag list to your Dropbox**

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 to a 3dr party cloud service providers (iCloud Drive, One Drive, Google Drive, Box, ...)**

SiteWorks lets you export to any 3rd party cloud service provider providing an iOS app compatible with the « Document Provider » functionality which is the case of all major services.

To export to one of those services, you first have to install the provider's application on your device and connect it to your account using your credentials. (For example, to use Google Drive with SiteWorks, first install the Google Drive app and configure it).

Once the provider's app installed and configured, you'll be able to export your reports to it right from SiteWorks following instructions below.

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

Once your document is generated, browse the service to the folder into which you want to upload your file and press button to save the document (this action button name can be



different depending on the service provider you use, please conform to their app documentation.

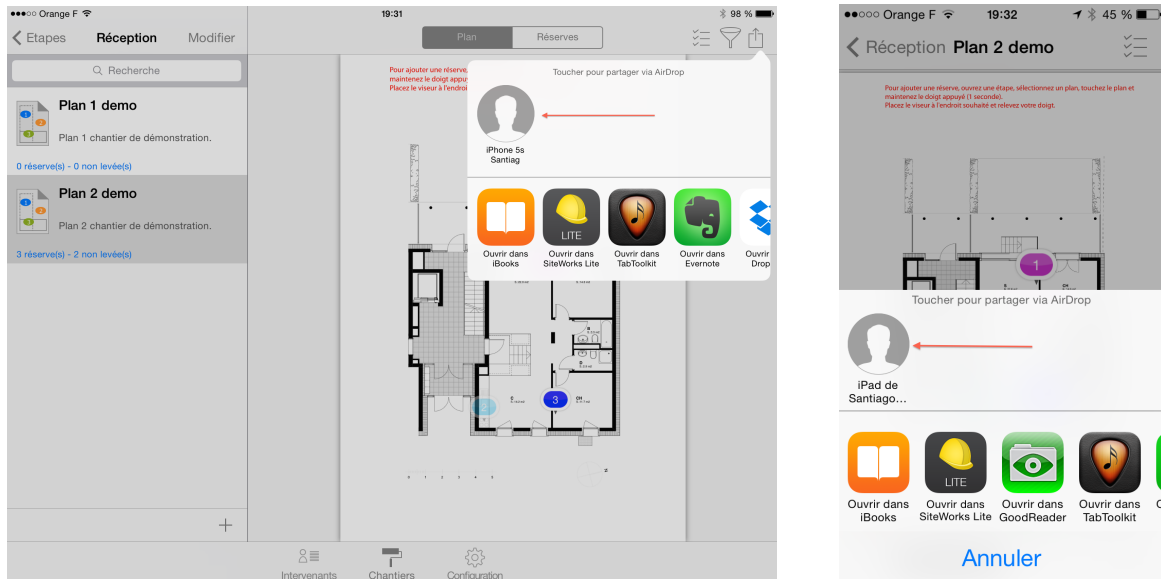
Once upload finished, the file will be present on your provider's storage service and available from all your connected devices.

## 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.



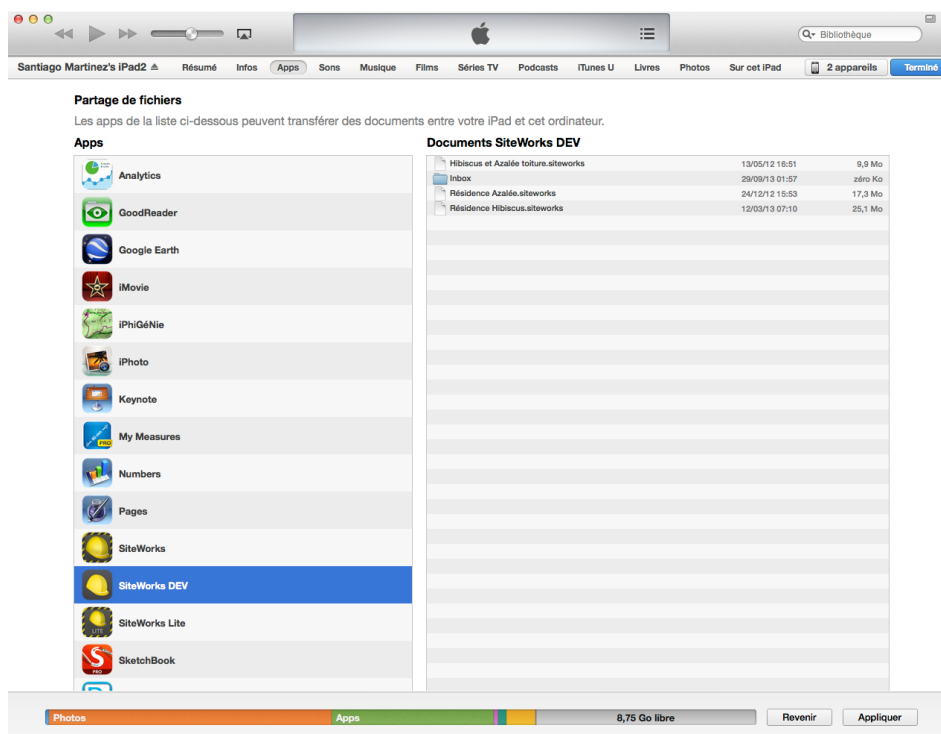
Accept the transfer on the destination device, and select SiteWorks in the list appearing on screen to open the file.

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

From a 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 :

- Plug your device into your computer and start iTunes.
- Select your iPad in «Devices» section in iTunes left column.
- Go into «Apps» tab
- In «File sharing» section select «SiteWorks» app
- Select the file you want to import and save it to your computer.



## **Backup, Share, Import a siteworks file**

The application let you save, share and merge your sites via email, Dropbox or iTunes.

As you might have noticed when generating reports, all export menus (via Dropbox, WebdDav, AirDrop, email or iTunes) give you an export option named «Siteworks file».

Sitework files allow you to share your sites between multiple iPads or keep a backup of them.

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

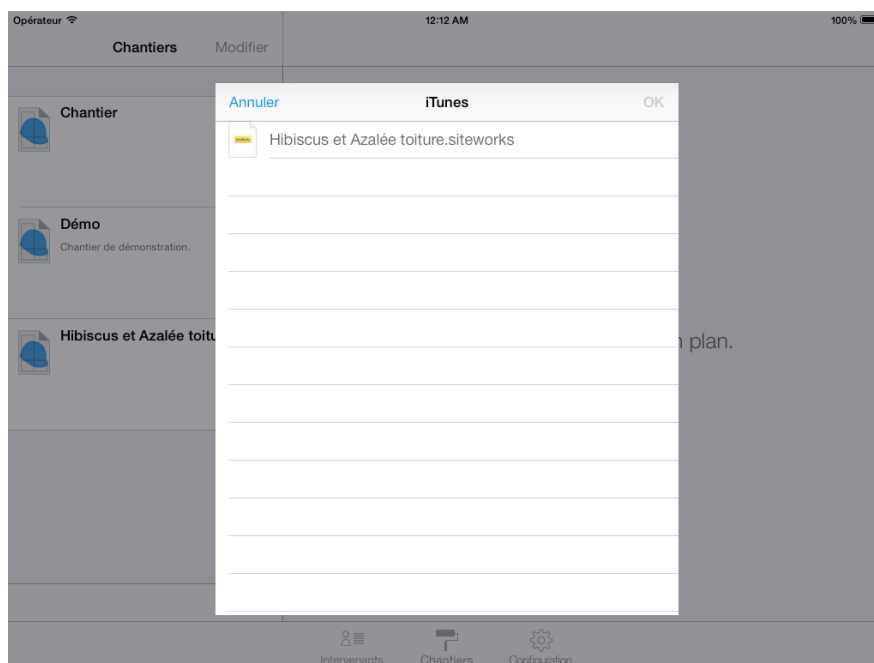
To generate a «.siteworks» file, simply press the «Siteworks file» button from one of the actions items, the procedure is the same as for the reports.

## **Import a siteworks file from iTunes**

Connect your iPad to iTunes and copy your siteworks file into the application (see import from iTunes p10).

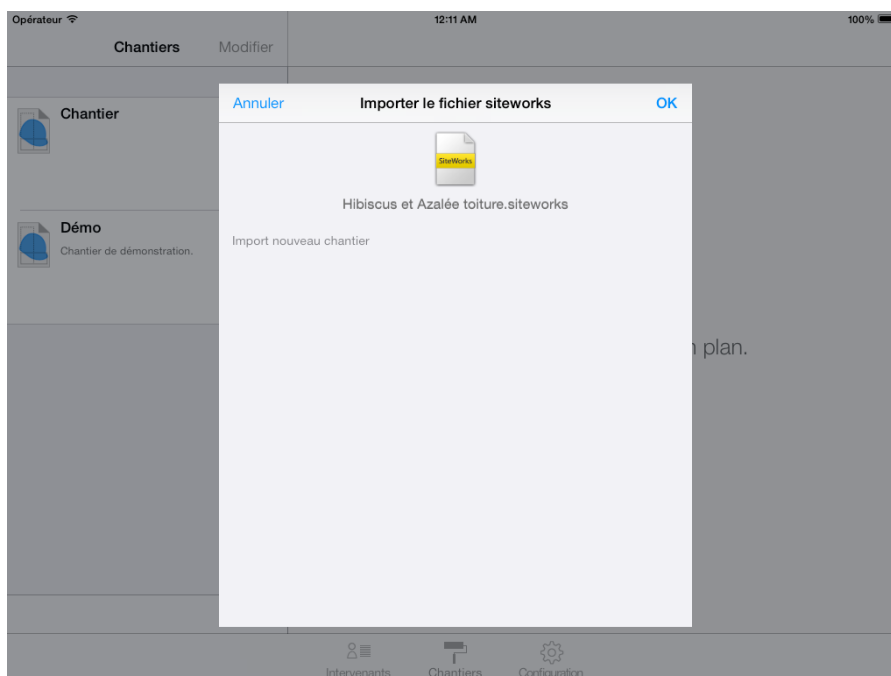
Start the app and go to the Site tab, go to the sites list and press the + button.

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 «OK» 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.

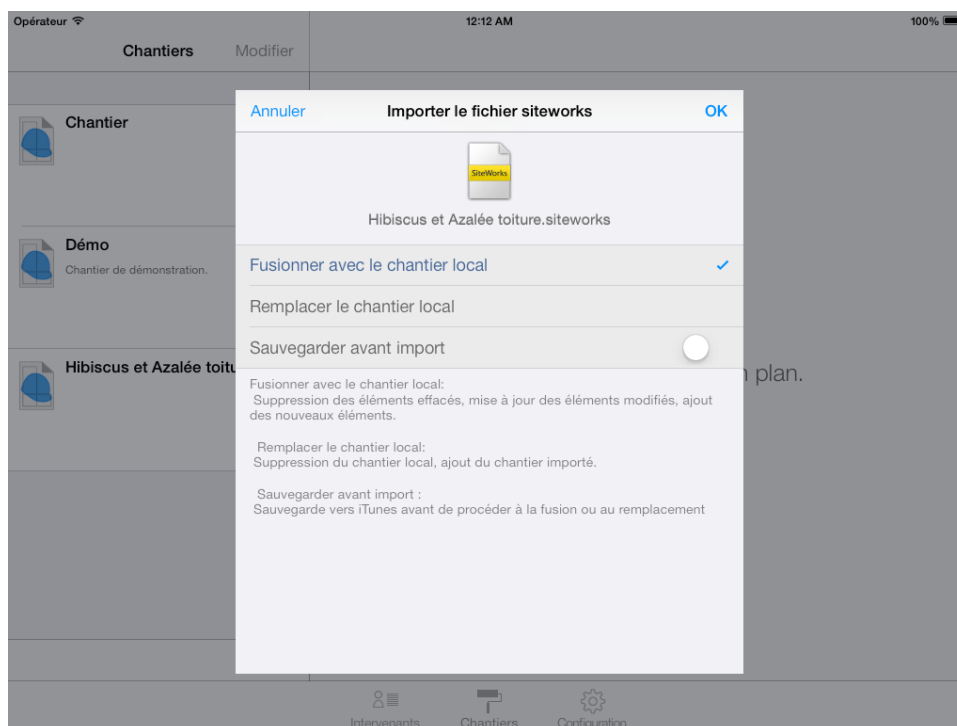
**As siteworks file merging process is based on date and time of edits, please set the «Set Automatically» date and time switch to on in the «Settings» app on all of your devices.**

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 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 «OK» button.

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

## Import a siteworks file from Dropbox

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.

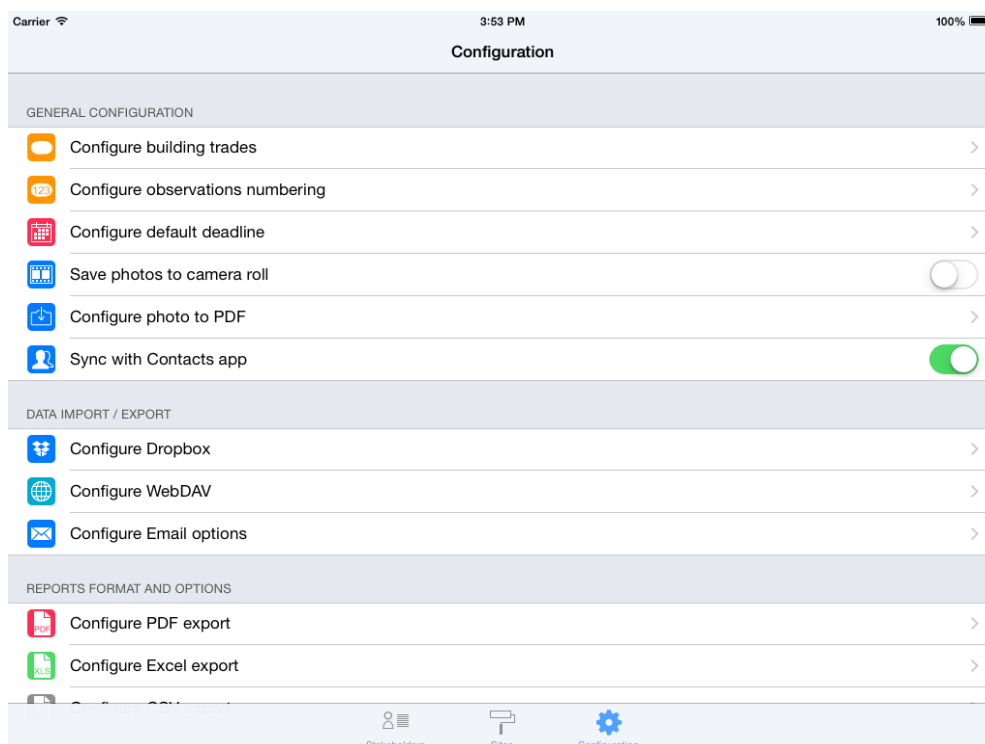
## Import a siteworks file from Mail

Same as page 14, Import from mail, 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

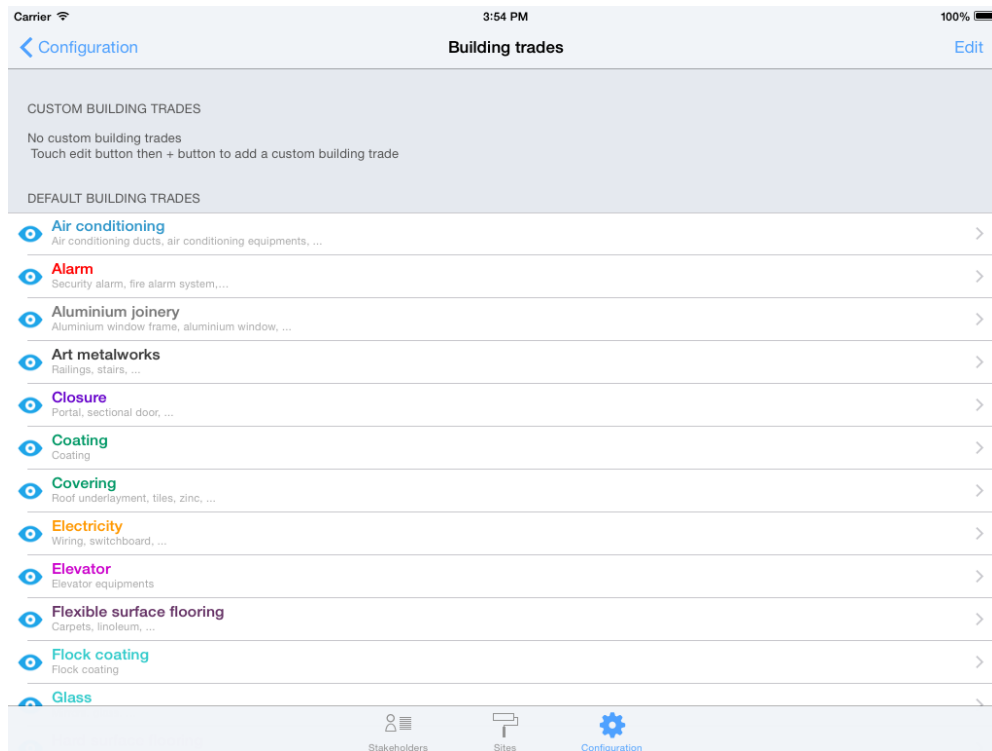
To configure building trades, select the «Configuration» tab and touch the «Configure building trades» cell.



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).

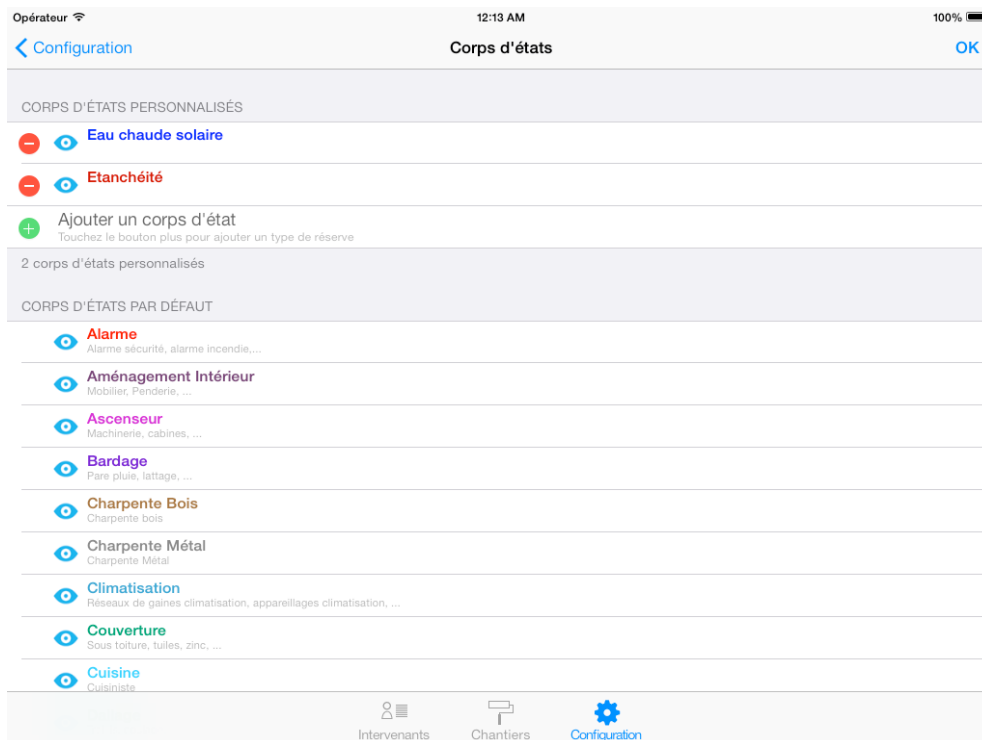
To modify a building trade color, press the color button and pick a color of your choice

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

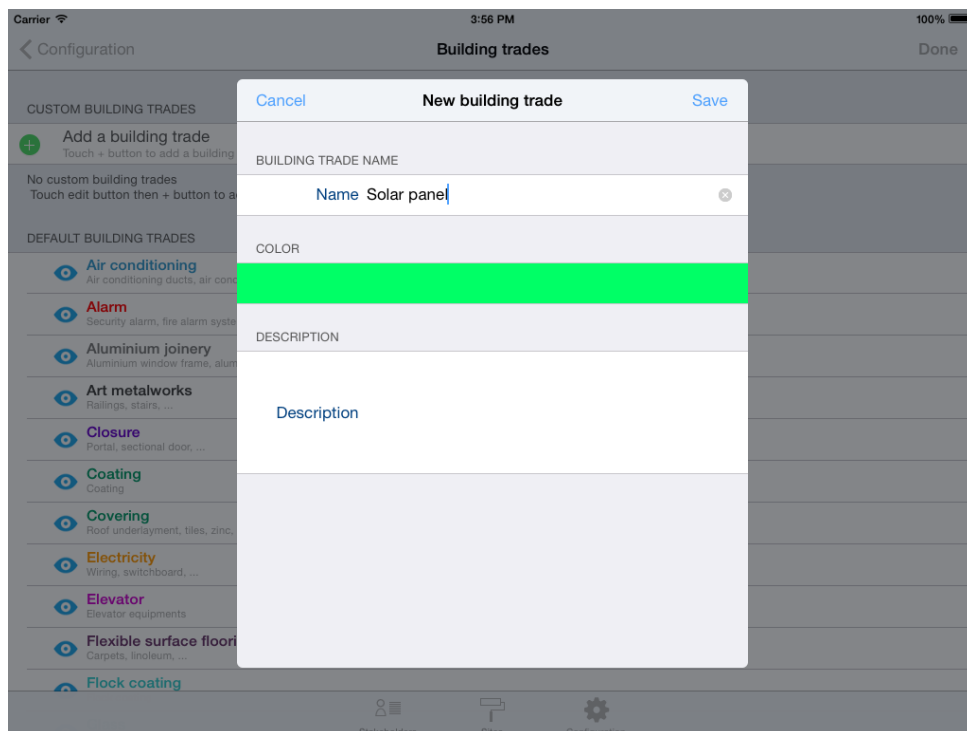
## Add a custom building trade

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

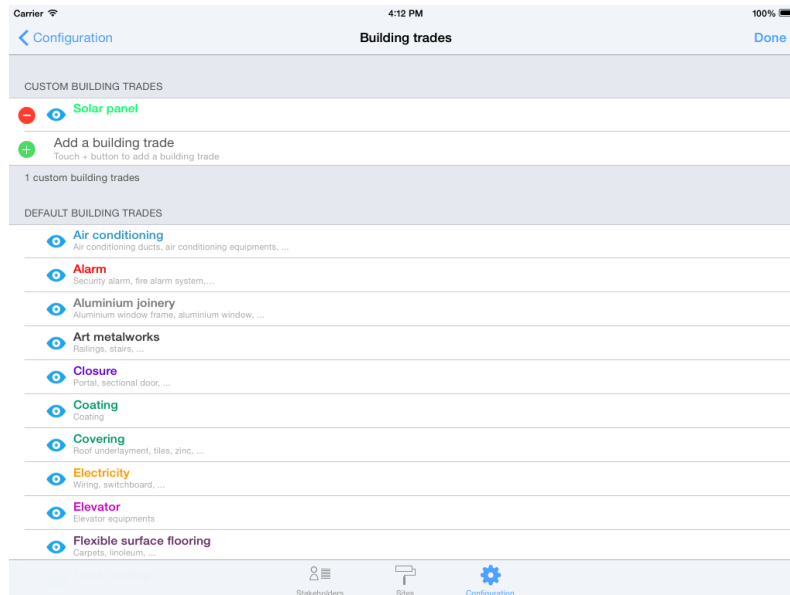
Press + button or «Add new building trade» cell



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



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

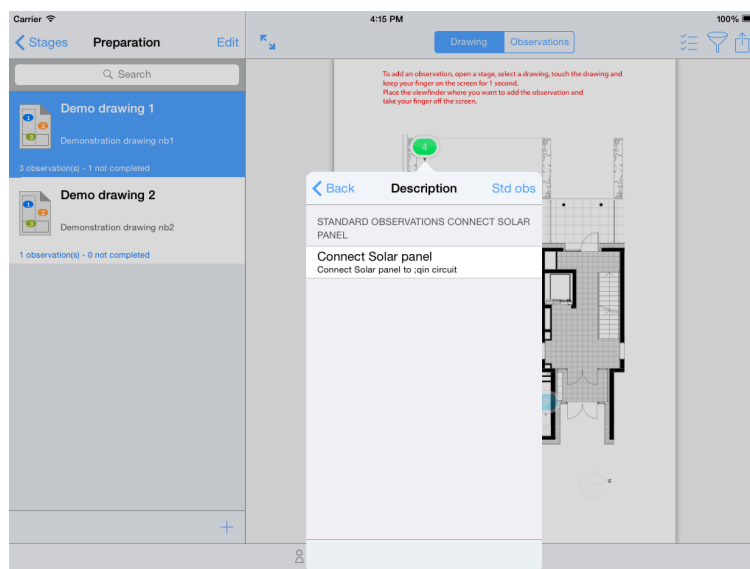


## Add a standard observation

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 custom observation (same procedure as above).

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.