

	<ul> <li>insite Tool</li> <li>Protes</li> <li>Notifications</li> <li>Profie</li> <li>Profie</li> <li>Plan</li> <li>Settings</li> </ul>	Projects or C Search by rame, number of location Active projects Provide file Provide file Pro
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**Insite Training Pack** Starter & Premium Plan



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## Account set up



1. Enter your email



2. Provide your details Enter your details then read and accept our <u>Privacy Policy</u> and <u>Terms of Usage</u>.



3. Phone or email Choose if you would like to be contacted by Phone or Email.



**4. Verify your email** Check your emails. Verify your email address and then head back to the app and tap **Continue**. To sign up for an Insite account head over to the web app at:

### teams.insiteapp.co.uk

Or download the app on your iOS or android mobile or tablet device via:

App Store for iPhones & iPads

Play Store for Android phones & tablets



# Profile





Tap the profile image placeholder in the round circle at the top of the page to change your profile image.



### Add a company logo

Select **Company logo** under the **General heading**. Tap **Choose now** to upload your logo.

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<	Profile	<u> </u>
	Add photo	
	Insite Teams	
My	y signature	×
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Acco		Save
	punt	
	Manage Insite account	
	Manage Insite account	>

### Add a signature

Select **My signature** under the **General heading**, draw out your signature and tap the save button.

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	Profile	
	Add photo	
	Insite Teams team@insiteapp.co.uk	
Profile details		
First name	Insite	×
Last name	leams	×
Position Sit	e Manager	×
Company	nsite Construction	×
Account		
Manage	Insite account	>
Logo & signa	ture	
/ My sign	ature	>
Compar	ny logo	>

### Populate your details

Add your details to the input fields under the **Details heading.** 

Set up your profile information to display on your reports and so that users can find you when adding you to projects.

For more information on profile settings please use the links provided below:

Update Profile Image

<u>Company Logo</u>

<u>Signatures</u>

### **Update Details**



# Settings, help & feedback

15:18		
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GENER	AL	
	Notifications	>
0	Images	>
	Reports	>

15:18		ail 🗢 💷
	Help	
HELP		
?	Help centre	ď
0	Troubleshooting	ď
	Contact us	>
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Ý.	Walkthrough	>
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	Terms of use	>
F	Licences	>
© 202′	I Insite Group Ltd. All rights reserv	ved.

### Update your settings

You'll find settings for notifications, images and reports under the **Settings** page from the menu.

### Need help?

Go to the **Help** page from the menu. You'll find links to the help centre and troubleshooting guide plus the option to **Contact us**.

# Contact us name il address can we help you? chments Add file from device ack

Contact form

Choose **Contact us** from the **Help** page to open the form and get in touch.

For more information about all of the available settings please use the links provided below:

Notification settings

Image settings

Report settings

For further help and troubleshooting please visit the Insite help centre using the link below:

Insite Help Centre



# Project: Create a project



	Manage project	
IMAGE		
Take or upload photo below		
DETAILS		
Name*		
Canada Wate	r	
Project number		
INS02		
Client		
Insite		
Architect		
JB architects		
Location		
London		
Project created t Aug 21, 2020	y; Insite Team	٥

**1. Create a new project** Tap the **blue plus** on the **Home** page to get started.

### **2. Populate the details** Enter the project details under the **Details** heading.



### 3. Add a photo

Tap the **blue camera** to add a photo from your library or using your camera.

# 941 And a general and a genera

4. Save

Tap the **tick** to save your new project.

Please note that **only plan admins can create projects**. If you are not a plan admin then please contact them and ask them to either add you to an existing project or set one up for you.

For more information on creating a project please visit:

Create a project



# **Project:** Adding users from your organisation

9:41		all 🗢 💻
	Canada Water	
Lists		1
15 Project Lis	ts 🔮	
Most recent	t: Welfare Inspection	
Templa	ates N	+ ew list
Project Deta	ils	
Canada Number: INSt Client: Insite	a Water	>
Overview		
💄 3 Assig	inees	>
<b>Q</b> 7 Locat	tions	>
Project	t settings	>
Statistics		



1. Go to collaborators2. Start invitingTap Collaborators in the<br/>toolbar on the projectTap the blue plus<br/>to open the Add<br/>collaborators page.

	all 🗢 💼	9:41		all 🗢 🖿
Add collaborators		<	Add collabor	ators
Search & invite users		Searc	ch & invite users	
e.g. hello@insiteapp.co.uk, example@gma	ail.com	e.g. h	ello@insiteapp.co.uk, exam	ple@gmail.com
From your organisation		From	your organisation	
Users (2)	Project role	1	Users (2)	Project role
Kate Nicolson	Internal 🗸		Kate Nicolson	Admin 🗸
George Smith			George Smith	
	Addusers			Add users

### 3. Select users to add

Use the checkboxes to select the users that you would like to add to the project.

### 4. Choose their role

Select their role and tap **Add users** when you are finished.

Please note that in order to add users from your organisation, they must already be a part of the Organisation list of your plan.

To add users from outside of the Organisation list, you can search for them as per the instructions on the next page.

For more information on managing the Organisation list or adding users to your project please visit:

Adding & invite users to your project (Premium plans)

Adding & invite users to your project (Starter plans)

Managing plan members

### Insite Teams Training Pack | 7



# Project: Search, add & invite users

	al 🗢 🔲
< Canada Wate	er 🙁
Lists	Ĵ
15 Project Lists	
Most recent: Welfare Inspection	
Templates	+ New list
Project Details	
Canada Water	
Number: INS02 Client: Insite	*
Overview	
3 Assignees	>
• 7 Locations	>
Project settings	>
Statistics	



1. Go to collaborators

Tap **Collaborators** in the toolbar on the project dashboard page.

### 2. Start inviting

Tap the **blue plus** to open the **Add collaborators** page.

	ad 🗢 💼	9:41		all 🕫 i
Add collaborater	3	<	Add collaborat	ors
Search & invite users		Sear	ch results	7
lvan@petrovflooring.co.uk, demo@ins	iteapp.co.uk	1	Existing users (1)	Project role
		×	Ivan Petrov	Admin 🗸
Comma separate email addresses to search for users from outside of your organisation.	or and add multiple		Emails to invite (1)	Project role
Back	Search	×	example@insiteapp.co.uk	Internal 🗸
	7		Back	Add & invite
	~			Л

### 3. Find users

To find users, type their email address into the search field and press **Search**. Use commas or semi-colons to separate multiple email addresses.

### 4. Choose their role

Your search results will be displayed as **Existing users** to add or **Emails to invite** to your project. Select their role and tap **Add & invite** when you are finished. External & Read only users have limited permissions on the project. See the table on the next page for more details.

Please note that you can only add users with the External & Read only roles to projects under Premium level plans.

For more information on setting up internal and external users and managing their permissions visit the links provided below:

Adding & invite users to your project (Premium plans)

Adding & invite users to your project (Starter plans)

### Managing plan members



# **Project:** Updating a user's role



You can update a user's role by tapping on them. Note that **only existing project admins can change user roles.** 

	Project admins	Internal	External	Read only
View project		$\checkmark$	~	<ul> <li>Image: A second s</li></ul>
Manage project details, settings & status	~	8	8	8
Add & remove collaborators and update their roles	~	8	×	×
View lists	~	~	~	$\checkmark$
Create lists	~	~	8	8
View items	~	~	~	$\checkmark$
Add items	~	~	~	8
Add photos and comments	~	~	~	8
Update item details, assignees & locations	All items	Their own items	Their own items	8 9
Update item status	All items	Their own items	Their own items	8
Create status requests	×	Other users' items	Other users' items	8
Approve & reject status requests	All items	Their own items	Their own items	8

The table above outlines the permissions for different users on a project. For more information on managing user permissions please visit:

<u>User roles & permissions explained (Premium plan)</u> <u>User roles & permissions explained (Starter plan)</u>



# **Project:** View & update details

		all 🗢 🖿
	Canada Water	**
Lists	3	
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	3 Assignees	>
•	7 Locations	>
\$	Project settings	>
Stat	istics	

	Manage project	
IMAGE		
Take or upload photo below		
DETAILS		
Name*		
Canada Wa	ter	
Project numb	er	
INS02		
Client		
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Architect		
JB architect	S	
Location		
London		
Project creater Aug 21, 2020	d by: Insite Team	

### 1. View details

Tap on the **Project** Details card on the project dashboard page.

# 2. Edit the details Edit the details in the

input fields under the Details heading.

	Manage project	atl ♥ ■ ✓	9:4
IMAGE			IM
Take or upload photo below			sT q
DETAILS			DE
Name*			N
Canada Wa	iter		c
Project numb	per		P
INS02			I
Client			c
Insite			h
Architect			A
JB architec	ts		J
Location			L
London			L
Project create Aug 21, 2020	d by: Insite Team		Pi
		$\checkmark$	

### 3. Update the image

To add or edit your projects photo tap the blue camera in the bottom right hand corner of the screen.

	Manage project	all † 🔳
Take or upload photo below		
DETAILS		
Name* Canada Water Project number		
INS02		
Client Insite		
Architect JB architects		
Location London		
Project created b Aug 21, 2020	y: Insite Team	

### 4. Save

Tap the **tick** to save your new project details.

### Please note that **only project** admins can edit the details

of a project but all users can view the details. If you are not a project admin then you will see the project details in read only mode.

For more information on updating your projects' details please visit:

Update project details



# **Project:** Customise field names





### **1. Go to project settings** Tap on **Project Settings** at the bottom of the project dashboard page.

### 2. Open customisation Go to Customise field

**names**. You will then have the option to customise the fields for projects, lists, items and reports.

ul 🗢	9:41 AM	≵ 100%∎
<	Project Settings	~
your own become ' 'Location	he name of fields throughout th terminology. For example 'Assig Subcontractors'. Note that 'Assi s' replacements work best when not 'Client'.	gnees' could ignees' and
users, an informati	take effect across this entire prod d including on any new reports. on please visit our help centre a se project field <b>names</b> .	For more
PROJECT	V	
Name 1	litle .	
Number		
Client		
Architect		
Location		
LIST		
Title		
Reference		
ITEM		
Title		
Descriptio	on	

### 3. Update as required

Enter the new terminology in the input fields. If a field is left blank then the default will be used as described by the **Title** of the field. You are able change the name of fields throughout the app to match your own terminology.

For example **'Assignees'** could become **'Subcontractors'** for your items, or **'Revision'** could become **'Title'** for your reports.

If you find that some custom terms are already set up then it could be that your plan admin has set these in the Admin Console. You can still override them at a project level if required.

For more information on custom field names please visit:

### **Custom Field Names**



# **Project:** Customise status options





### **1. Go to project settings** Tap on **Project Settings** at the bottom of the project dashboard page.

### 2. Open status options Go to Status options. You will now be presented with the default status groups.



### 3. Add or update

Tap the **blue plus** to create a new status group, or choose an existing group to update.



### 4. Customise options

Provide a name, select a colour and icon. Tap the **tick** to save it when you are done. With Insite you can create custom status groups to align the app to your processes.

For more information on custom status groups please visit:

Custom status options

Using custom status groups



# **Project:** Add & manage tags





### **1. Go to project settings** Tap on **Project Settings** at the bottom of the project dashboard

page.

### 2. Open tags

Go to **Tags**. You will now be presented with any existing tags.



### 3. Add or update

Tap the **blue plus** to create a new tag, or choose an existing tag to update.



colour for the tag and tap the **tick** to save it

when you are done.

### Please note that **only project** admins and internal users can update & manage tags.

Tags can be used to group your lists. This adds an extra layer to the hierarchy of your project; e.g. without tags the structure is Project > Lists and with tags the structure can become Project > Tags > Lists.

For more information on adding, managing and assigning tags please use the links provided below:

### Set up & manage project tags

<u>Assign & remove list tags</u>

Insite Teams Training Pack | 13



# Project: Manage locations & drawings





### 1. Go to project locations

Open up the project dashboard and scroll down to the **Overview** heading and tap on **Locations**.





### 3. Title the location

Enter the location name in the input field and tap the **tick** to save.



### 4. Add a drawing

Tap on **Open image library** to upload either a JPEG or PNG file. From a desktop, you can also upload a PDF. In order to make the process of adding items more efficient, you are able to set up and manage project locations ahead of time.

This can be done at the project level so that they are available on all of your lists.

You can also add drawings to locations so that you can pinpoint items for additional clarity, this feature is only available on Premium plans.

For more information on managing locations please visit:

### Managing Locations

Add location drawings & manage their details

### Insite Teams Training Pack | 14



# Project: Manage assignees & link to users





### 1. Go to assignees

Open up the project dashboard and scroll down to the **Overview** heading and tap on **Assignees**.





### 3. Title the assignee

Enter the assignee name in the input field and tap the **tick** to save.



### 4. Link project users

Choose a collaborator to link the assignee to. They will receive notifications for items which they are assigned to. Just like locations you can set up the assignees on a project ahead of time to make adding items more efficient.

You can also tag users to assignees so that they will receive notification updates when they are assigned to an item, as well as further notifications when that item is updated.

For more information on managing assignees and linking to users please use the links provided below:

### Managing Assignees

### Linking Users



# **Project:** View lists & statistics



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Lists		(	Q Search	
15			Active lists	$\bigvee$
Project Lists			Safety	Audit
Most recent: Welfare Inspection			List Ref - Ext Sep 3, 2018	:s 01
<b>1</b>	+		127 Items	8 📄
Templates	New list		Archived	
			Externa List Ref - Int	
Project Details			Sep 14, 2018	
Canada Water	>	(	187 Items	2
Number: INS02 Client: Insite			Signed off	
Overview				
2 3 Assignees	>			
• 7 Locations	>			
Project settings	>			
Statistics			=	

### Stats & vitals

Open up a project from the home screen to be taken to the dashboard. Vital stats are shown underneath the **Statistics** heading.

### Accessing lists

View your lists by tapping on the **Lists** card at the top of the dashboard.

# all 🗢 🔳 ..... da Water Hide 1 list 🗸 45% Complete Hide 1 list 🗸 (S 100% Complete Show 2 lists >

### Viewing your lists

You will now be presented with all of the lists in the project. See overleaf for creating new lists. Your project contains your lists and information.

For more information on the project dashboard page please visit:

View project dashboard



# **List:** Create a list & set it's privacy

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	Canada Water	**
Q Search		
Active lists		Hide 1 list 🗸
Safety A List Ref - Exts Sep 3, 2018	01	
127 Items	🗐 8 Reports	S 45% Complete
Archived		Hide 1 list 🗸
Externa List Ref - Ints I Sep 14, 2018	D1	100% Complete
Signed off		Show 2 lists 🗲
		+
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0	User	
0	Ivan Petrov	
0	Anne Saunders	
0	Insite Team	
Frcin t	emplate	
Choos	template	-
Tags		
Select	oradd	:
Status	options	
Progr	ess	

### 1. Create a new list

Go to your project's Lists page and tap the **blue** plus to get started.

### 2. Populate the details & select who has access

Enter the list details under the **Details** heading. Use the checkboxes to decide who will have access.

	atl 🗢 🔳	9:41		
New list	$\sim$		New list	
3		From template		
		Choose template		
Audit Ice		Tags		
Tags		Select or add		
spection	$\neg$	Status options	Ľ	
ose existing		Progress		
Inspection Plot 3		× Incomplete		
ate new		In progress		
Create tag: Inspection		Complete		
Cancel Dor	he	-		
t or add	>			
s options				
ress	•			

### 3. Add tags

Details

Title \*

Reference

Tags

Select or

Status op Progress

Tap Select or add under the **Tags** heading to add tags to your list.

### 4. Choose status' & save

Select a status group and tap the **tick** to save your new list.

You can choose who can view a list by setting user access.

Add tags to your list to group them together when viewing them and exporting reports.

For more information on lists, privacy & tagging please use the links provided below:

### Create a list

Update who has access to a list Assign & remove list tags Using custom status options



# List: Items and Reports & details tabs



9:41 <b>K</b> Safety	nıt≎■ yAudit 🌱	9;41 <b>&lt;</b>
Reports	Reports & Details	Details
10 Feb 10, 2021 ↓ Download	PDF	Safe Refere Created
B PDF PDF Reports	2 XLSX XLSX Reports	Tags
Details	Active	Status
Safety Audit Reference: INS02 Created: Aug 16, 2020	>	12%
	Change Status	45%
Tags		
Safety	>	
Status		
<b>12%</b> • • • • • • • • • • • • • • • • • • •	<b>33%</b> ••• 30 In progress	

### Your items

View your items under the **Item** tab.

### Report storage

All reports are contained within the **Reports & Details** tab. The most recent is shown at the top, old reports are in the archive folders.

### Safety Audit > Reference: INS02 Created: Aug 16, 2020 Change Status ags Safety > tatus 33% 12% 44 Complete 30 In progress 0 45% 56% 67 Incomplete 12 Overdue

ul 🕆 🔳

Active

-

### Viewing list information

Tap the **Reports & Details** tab to view list information. You will now be presented with various information about the list. Your lists are split into two tabs. Your items are displayed under the **Items** tab. Under the **Reports & Details** tab you will find your reports and the list information.

For more information on viewing list information and reports please use the links provided below:

View list information

<u>View a report</u>

View list activity



# List: View & update details





### 1. Open the list

Tap on the **List** which you would like to edit.





### 3. View details

Tap on the **details card** under the **List Details** heading in the **Reports & Details** tab.



### 4. Edit the details

Edit the details in the input fields under the **Details** heading. Tap the **tick** to save your new list details. Please note that **only project** admins and the user who created the list can edit the details, but all users can view the details. If you cannot edit the details then you will see them in read only mode.

For more information on managing lists please visit:

### Managing lists



## **Items:** Create items





### 1. Create a new item

Open your list and tap the **blue camera** to get started.

### 2. Select an option

You can now choose whether to **Take** a new photo, **Choose** from your library or create a **Blank** item without an image.



### 3. For multiple images

If you selected multiple images from your library you can now choose whether to add a **Single item** with all of the images or **Multiple items** for the images.



**4. Populate the details** Enter item details under the **Details** heading. You can create items in a few different ways with Insite:

- Start creating items by taking a photo
- Create items from images in your devices image library
- Generate a blank item

For more information on creating items please visit:

<u>Create an item</u>



# **Items:** Add multiple & copy information



	New Item(1)	
<	New Item(1)	
IMAGE		
	ļ	
DETAILS		
Title		
Master Ba	throom	
Description		
Due date		
Due date	0	
ASSIGNED T		
ASSIGNED To Select or ad	d	
ASSIGNED To Select or ad	id Id	

### Use the arrows

When creating multiple items you are making use of the **New items** feed. This is a collection of items which you are able to scroll through.

bottom toolbar.

Select or add	Sel
LOCATIONS	LOCATIO
Select or add	Select or
	COMMEN
< Edit Copy +	<
1. Copy info across	2. Se
You can copy information	Chec
from the last item over	you v
to the next item. Start	acros
to the next item. Start by tapping <b>Copy</b> on the	acros tap <b>E</b>



### elect fields to copy

ck the fields which would like to copy ss to new items and tap Done.



3. Create pre-filled items Use the new item + button to add a new item into your new items feed. This item will already contain the information you chose to copy from the last item.

With Insite you can quickly create multiple items. Use the toolbar at the bottom of the new items feed to scroll through new items and add more into the feed.

For more information on adding multiple items & copying info please visit:

Adding multiple and copying info



# Items: Edit multiple items in feed

			ull 🗢 🔲
<	New Ite	em(1)	$\checkmark$
IMAGE			
DETAILS			
Title			
Main Bathroom			
Description			
Due date			
ASSIGNED TO			
Select or add			
LOCATIONS			
Select or add			
COMMENTS (0)	Ĵ		
< (	Edit	Сору	>



### 1. Open the multi-edit page

Once you have some items in the new items feed, tap **Edit** on the bottom toolbar.

### 2. Enter details to apply

Enter details which you would like to apply to all of the current items in the new items feed.

### 3. Update all items

When you are done make sure the checkboxes are checked for the fields to update and tap the **tick** to update all of the feed items.

ul 🕆 🔳

 $\checkmark$ 

When you are creating multiple items you have the ability to update the information of all of the items in the new items feed at once.

For more information on editing multiple items in the feed please visit:

Edit multiple items in feed



# Items: Assign items to assignees & locations

al 🕆 🔳

IMAGE

DETAILS

Title

Descr

Due d

ASSIG

Select

LOCATI

Select or

COMME



Take or up photo bel	
DETA	Assignees
Title	Electrical
Ma	Choose existing
Des	RK Electrical
Nee	John's Electrical
Due	Local Electrical Ltd
	Create new
ASSI	Create assignee: Electrical
Sele	Cancel Done
LOCATIO	NS
Select or	add
COMMEN	ITS (0)

### 1. Open assignee list

Create an item or open up an item you would like to edit. Go to the **Assigned to** heading and tap **Select or add.** 

### 2. Select assignees

Use the search field to filter existing project assignees shown under **Choose existing**. Otherwise, enter a new assignee and tap **Create assignee:** *new name*. Tap **Ok** to assign the item to them.

տt ຈ 🖿 Manage item 🗸	9:41
Bathroom p paint master bathroom	IMAGE Take or uplead photo below. DETA Locations Title Ma Choose existing Des O Borough Market Ne Dena Street
•	Due Canada Water
то	ASSIC Create location: Market
add	Sele Cancel Done
add	Select or add
rs (0)	COMMENTS (0)
add	< Edit Copy +

### 1. Open location list

Create an item or open up an item you would like to edit. Go to the **Locations** heading and tap **Select or add.** 

### 2. Select locations

Use the search field to filter existing project locations shown under **Choose existing**. Otherwise, enter a new location and tap **Create location:** *new name*. Tap **Ok** to assign the item to them. Assignees and locations are added to items by choosing them from a list.

You are able to select as many assignees and locations as you would like for each item and you can update these at any time.

For more information on assigning items to assignees & locations please visit:

### Assign items to assignees

Assign items to locations

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# **Items:** Pinpoint items on location drawings



<	Manage item	~
Image		
Details		
Title		
Master Bathroor	n	>
Description		
Need to paint m	aster bathroom	>
Due date		
Assignees		
Select or add		>
Locations		
Select or add		>
Ground Floe	-	×
Locatide pins (	0/1 pinned)	
Q Auda		

### 1. Add locations

Create an item or open up an item you would like to edit. Go to the **Locations** heading and tap **Select or add.** Choose a location that has a drawing attached.

### 2. Open a drawing

Tap on the drawing under the **Location pins** heading to open the **Add pin** page.



### 3. Add a pin

Tap anywhere on the drawing to add a pin. Tap the **tick** when you are done and make sure to save the item afterwards. On Premium plans, you can add drawings or schematics to locations to allow you to pinpoint your items.

The pins will be displayed on your reports too.

For more information on pinning items to drawings, please use the links provided below:

Pinning items to drawings

Add drawings to locations



# **Items:** Update details, add comments, change status & set priority

	Manage item	all 🗢 🖿 🗸
Image		
Details		
Title Beams not fixe	ed to columns	
Description Need to reset I	peams, see drawing	
Due date Tue 20, Aug, 1	8	
Assignees		
Select or add		>
Locations		
Select or add		>
Status		
	te	<b></b> )
Last updated: Feb	29, 2021, 12:51:07 PM	
Priority		



### 1. Update details

Create an item or open up an item you would like to edit. Edit the details underneath the Details heading.

2. Create a comment 3. Set priority Go to the Comments heading and tap Tap to add comment.

Status

Priority

Priority

High

Medium

O Low

O Not set



Choose a priority and tap the Tick to save.

....)

### 4. Change an item's status

When viewing a list of items you can swipe an item to reveal the status options. Tap an option to update it.

Updating item details and adding comments is easily done from within the item.

On certain lists you may not be able to update the status of items which you have not created. If this is the case you can request a status update. See the next page.

For more information on updating items and their status' please use the links provided below:

Update item details

Add, edit and remove comments

Change an item's status

Change an item's priority



## **Items:** Request & approve status updates

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<	Manage item	
Status		
💮 In pr	ogress	•
Status requ	est (0)	
Request	status update	>
Comments	m Ĵ	SEE ALL
JD	Add supports John Doe Sep 30, 2020, 12:29:12PM	
		Add Another
Activity		
Oct 17, 20	im created this item	



### 1. Create a new request

Open the item. Select **Request status update** underneath the **Status requests** heading.

### 2. Select a status

Select the new status that you are requesting. Next, **add a comment** under the Comment heading. Optionally **add photos.** Tap the tick to create the new request.



### 1. Approve or reject

As the item owner or project admin select either **Approve** or **Reject** on a status request within an item.

# Status request (1) For: On progress: Te: On Complete For: On progress: Te: On Complete The status request Approve status request Update item status to complete Add comment Add comment Testing Tes

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### 2. Confirm decision

Add an optional comment and confirm your decision.

If you are unable to change the status of an item then you can request a status update instead.

Item owners or project admins can approve or reject requests. On approval the item's status will automatically be updated.

For more information on status requests please use the links provided below:

### Request a status update

Approve or reject a status update



# **Items:** Add, edit & comment on images

	Manage item	ail 🗢 🖿 V
IMAGE		
DETAILS		
Title Master Bathro	om	
Description Need to paint r	master bathroom	
Due date		
ASSIGNED TO		
Select or add		
LOCATIONS		Take O
Select or add		
COMMENTS (0)		hoose
Select or add		×



bring up the manage

image options.

### Add more images

Tap the **blue camera** to add more images to an item. Choose whether to Take a new photo or Choose an image from your library.





### **Edit images**

Add shapes, add text or draw on images using the tools at the bottom of the editor.

IMAGE	View Eat AD NEW Please check pipework	Vov Edit AD NEW Please check pipework	View Edit ADD NEW Please check pipework	ADD NEW Please check pipework	View Edit ADD NEW Please check pipework COMMENTS (0)	Manage comments	atl † ∎
Please check pipework Add COMMENTS (0)	Please check pipework Add COMMENTS (0)	Please check pipework Add COMMENTS (0)	Please check pipework Add COMMENTS (0)	Please check pipework Add COMMENTS (0)	Please check pipework Add COMMENTS (0)	View Edit	
Please check pipework Add COMMENTS (0)	Please check pipework Add COMMENTS (0)	Please check pipework Add COMMENTS (0)	Please check pipework Add COMMENTS (0)	Please check pipework Add COMMENTS (0)	Please check pipework Add COMMENTS (0)		
COMMENTS (0)	COMMENTS (0)	COMMENTS (0)	COMMENTS (0)	COMMENTS (0)	COMMENTS (0)	Ck pipework	
							Add

### **Comment on images**

Add comments to images in the field under the Add new heading and tap **Add**. Make sure to save the item afterwards.

With Insite you can edit, as well as add comments to, specific images. Images can have multiple comments from different users.

For more information on adding, editing and commenting on images please use the links provided below:

Add, edit and remove images

Comment on images

### Insite Teams Training Pack 27



# Items: Update multiple items





### **1. Show actions**

Tap the **Actions** button located on the left hand side of the toolbar at the bottom of your screen.

### 2. Choose edit items

Tap Edit items from the menu which pops up. Your items will now move over to the right and reveal their checkboxes.



### 3. Select items

Check the items which you would like to update and tap the **tick** which is now located in place of the Actions button.

# Select date Wednesday 21 Oct, 2020

1 🕆 🗖

### 4. Make changes

Enter details which you would like to apply to all of the checked items. Make sure the fields to update are checked. Tap the **tick** when you are done to update the items.

On some lists you are only able to edit items which you have created. This is why you may see the checkboxes disabled (greyed out) next to some items.

You can update the details of multiple items in a list by using the item action checkboxes.

For more information on updating multiple items please visit:

### Update multiple items

### Insite Teams Training Pack 28



# Items: Filter & Sort



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<	Filter & Sort	
Sort	order	Reset filter
Sort	order	-
A-	Z by Title	
Stat	us	
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	Complete	
Ass	gned to	
Assi	inees	•
Loc	ation	
Loca	tions	
Crea	ated by	
Crea	ted by	

### 1. Open filter options

Tap the **Filter & sort** button located on the right hand side of the bottom toolbar.

### 2. Select filters

You will now be presented with the **Filter & sort** page. Select any filters as required.

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	Filter & Sort	× .	<
Sort orde	r	Reset filters	Sort orde
Sort order		-	Sort orde
A-Z by T	itle		A-Z by
St			Status
So	t order		
	Newest last	3	
$\left( \circ \right)$	Newest first		
$\left( \begin{array}{c} 0 \end{array} \right)$	Due date		Cor
0	Priority High to Low		
<b>^</b> O	A-Z by Title		Assigne
A	Cancel	Ok	Assignees
Location			Location
Locations		-	Locations
Created b	у		Created
Created by		<b>•</b> )	Created by

### 3. Choose sort order

Choose how you would like to sort your items and tap **Ok**.

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<	Filter & Sort	$\checkmark$
Sort order		Resectilters
Sort order		•
A-Z by Title		
Status		
Overdue	•	0
	ete	8
	ess	•
Comple	te	
Assigned to		
Assignees		•
Location		
Locations		•
Created by		
Created by		•

### 4. Confirm your options

Tap the **tick** in the top right of your screen and you will return to your list with the filters and sort options applied. For more information on filtering and sorting items please visit:

### Filter & sort items



# **Reports:** Generate PDF & Excel reports





### 1. Start generating

Tap the **Generate** button at the top of the screen on the right hand side.

### 2. Provide a revision

A report revision is required. Enter one in the field under the **Information** heading.

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	Generate Rep	oort	~	<	Genera
INFORMATIC	DN			INFORM/	ATION
Revision*				Revision	* INS v1
Report date		Saturday 30 Oct	t,2020	Report d	ate
FORMAT				FORMAT	
Report type	•	PD	of T	Report 1	type
IMAGES		Ĵ	٨	IMAGES	
Images per	row		4 -	Images	per row
IMAGE QUA	ALITY			IMAGE	QUALITY
30 🖸	<b></b>		0	30	0
			to		
SORT ORDER	R			SORT OR	DER L
Sort order			-	Sort orde	ər
Created: Nev	west last			Created:	Newest last
STATUS				STATUS	
Ove	rdue		0	0	Overdue
	mnlete				Incomplete

### 3. Choose a format

Select a format under the **Format** heading. You can choose to generate either a **PDF** or **Excel** report.

# INFORMATION Revision\* INIS V1 Report date Saturday 30 Oct,2020 FORMAT Report type PDF PDF MAGES MAGES MAGES MAGE QUALITY Define the sate of your reports. 28-100% Soft order Soft order Soft order Soft order Soft order Casted: Newest last STATUS Casted: Newest last Casted: Newest last Casted: Newest last Casted: Newest last

### 4. Filter & sort

Choose how the items will be sorted in the report and select any filters. Tap the **tick** when you are happy to generate a new report. You can generate both PDF and Excel format reports with Insite. These will be stored under the reports tab within each list so that you can distribute them at any time.

For more information on generating reports please visit:

### Create a report



# **List templates:** Creating list templates

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	Canada Wate	er 😕
Lists		
15 Project Lis Most recen	sts t: Welfare Inspection	
Templ	ates	+ New list
Project <b>P</b> et	ails	
Canad Number: INS Client: Insite	a Water	>
Overview		
💄 3 Assi	gnees	>
<b>9</b> 7 Loca	itions	>
🔹 Projec	t settings	>
Statistics		



### 1. Open list templates

Tap Templates on the project dashboard screen to go to your list templates.



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	New template	$\sim$	< Templa
Details			Q Search
Template	a name* nspection a description nspection following WAS 911		Press start to cre
Tags			
Select of Status of Progre	options	> -	
×	Incomplete		-
	In progress Complete		You c items pi
	<u>)</u>		
			=

### 3. Enter details

Enter the template details in the input fields and assign any tags which you would like to be on any lists created from this template. Choose a status group and tap the **tick** to save your new template.

### 4. Save

You will now be taken to the new template. Use the **blue plus** to create new template items using the same methods described under the Add items section of this training pack.

all 🕆 🔳

Start

editing a list template

No Items ently have no items, to add se click the **blue plus** below With Insite you can create templates for lists which contain templated items. These can be used to save time if you have repetitive audits which you may do on a weekly or monthly basis, for example.

For more information on creating list templates please visit:

### Create a list template

Insite Teams Training Pack 31



# List templates: New list from template

9:41 <b>&lt;</b>	Canada Water	all 🗢 🖿
Lists		_
15 Project List Most recent	ts : Welfare Inspection	
Templa	tes	+ New list
Project Peta	ils	
Canada Number: INSO Client: Insite		>
Overview		
2 3 Assig	nees	>
<b>Q</b> 7 Locat	ions	>
Project	settings	>
Statistics		



### 1. Open list templates

Tap **Templates** on the project dashboard screen to go to your list templates.



Open the template which you would like to create a new list from.

9:41		all 🗢 🖿	9:41
Contract	are inspec	uon 🗸	
Q. Search			Det
(i) Your now editing welfare inspect		ate	Title
You are now editing a templa template click start.	te, to create a lis	t using this	Refe
	(	Start	
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Beams not fixed to ceilir 6th floor	ig corre		From
	20 4		
No assignee	e 20, Aug, 21		Ch
First fix electrical power	supply		Tag
A1 Construct Ltd Fr	i, 08 Sep, 21		Sel
General to all floors 4th floor			List
A1 Construct Ltd Fr	i, 08 Sep, 21		
Cladding 4th floor			C
A1 Construct Ltd Fr	i, 08 Sep, 21		C
		+	Choo
=			orgar who i you c

### 3. Press start

Tap **start** in the blue header to create a new list using the current template.

# 9:41 uit P => New List Details Image: Comparison of the system of the s

### Alternatively

When creating a new list, as per page 12, you can choose a template using the dropdown under the **From template** heading. For more information on creating new lists from templates please use the links provided below:

### New list from template

Create a list



# Sign off & archive lists: Sign off a list







Tap Reports & details from inside your chosen list.

# 1 Reports 10 Feb 10, 2021 ↓ Download XLSX Active >

2. Press change status

Tap Change status under the list details card.

				<b>⇒</b> ■
<	Safe	ety Audit		
	ltems	Rep	ports & Deta	ails
Repor	ts			
T( Feb	<b>)</b> 10, 2021		PDF	
	List status			
<b>3</b> PE	Active			•
_	Archived			
D	Signed off			e
		Cancel	Ok	
	rence: 001 ted: Feb 27, 2021		~	
		View list	Change S	Status
Status				
<b>12</b> %	mplete	33% 30 ln pr		
45	% 😣	56%	6	0

### 3. Sign off

Choose **Signed off** from the list of options.



4. Confirm status Add a comment and signature and tap Complete & sign off when you are done.

For more information on signing off & archiving lists please use the link provided below:

Sign off & archive list



# Sign off & archive lists: Archive a list





Tap **Reports & details** from inside your chosen list.

### 1 Reports 10 Feb 10, 2021 ↓ Download 3 PDF 2 XLSX Active Details **Safety Audit** > Reference: INS02 Created: Aug 16, 2020 Tags Safety Status 33% 12% 44 Complete 30 In progress

### 2. Press change status

Tap **Change status** under the list details card.



### 3. Archive

Choose **Archived** from the list of options.



For more information on signing off & archiving lists please use the link provided below:

Sign off & archive list

### **4. Confirm status** Add a comment and tap **Archive list** when you are done.