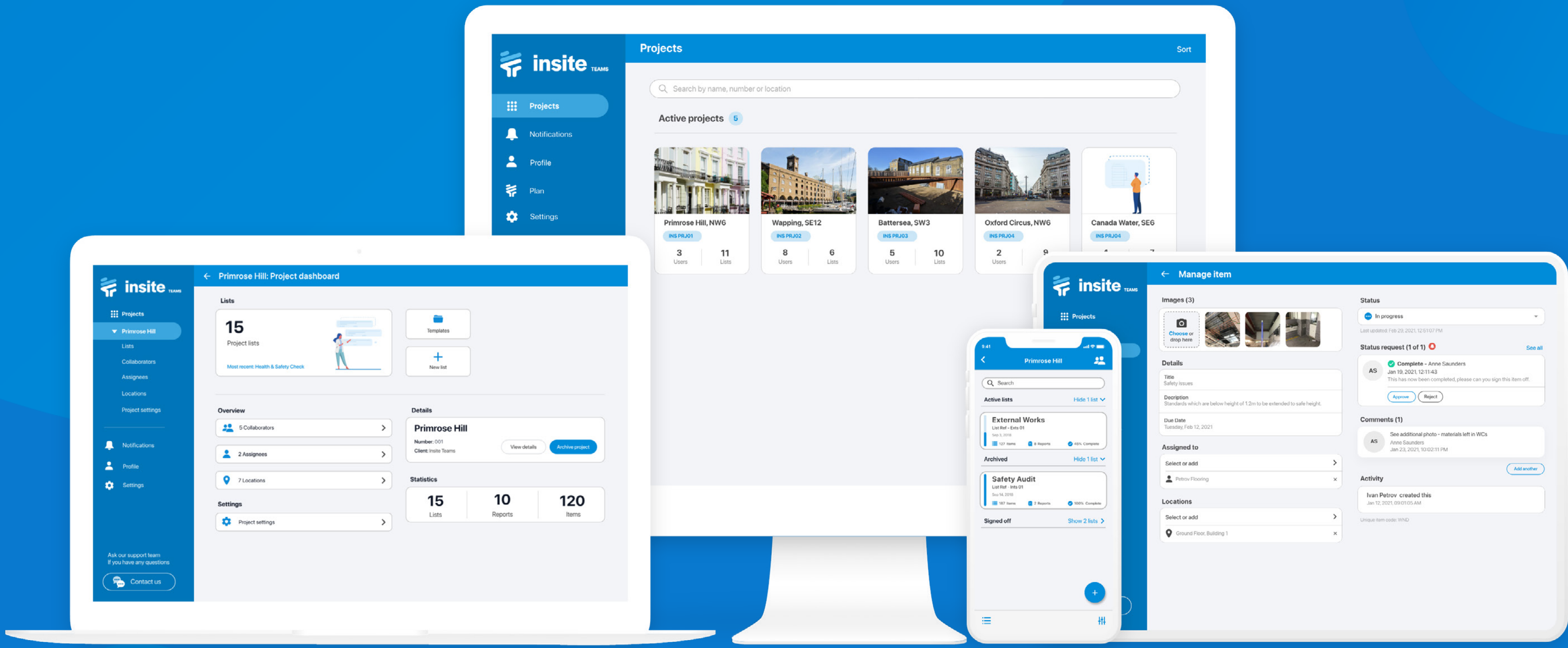
insite



Insite Training Pack

Starter & Premium Plan

insite TEAMS

Contents

Account set up 3
Profile 4
Settings, help & feedback 5
Create a project
- Create a project 6
- Adding users from your organisation 7
- Search, add & invite users 8
- Updating a user's role 9
- View & update details 10
- Customise field names 11
- Customise status options 12
- Add & manage tags 13
- Manage locations & drawings 14
- Manage assignees & link to users 15
- View lists & statistics 16

Start making lists
- Create a list & set it's privacy 17
- Items and Reports & details tabs 18
- View & update details 19

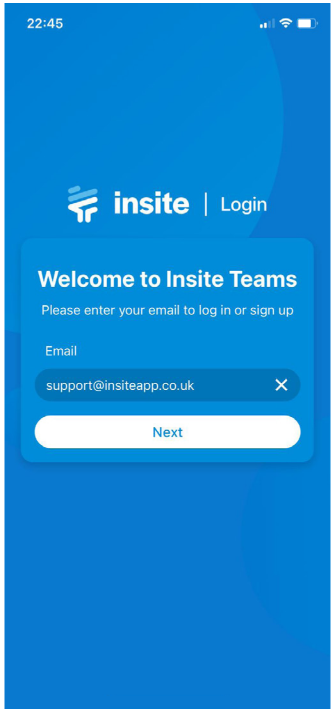
Add items
- Create items 20
- Add multiple & copy information 21
- Edit multiple items in feed 22
- Assign items to assignees & locations 23
- Pinpoint items on location drawings 24
- Update details, add comments & change status 25
- Request & approve status updates 26
- Add, edit & comment on images 27
- Update multiple items 28
- Filter & Sort 29

Reports
- Generate PDF & Excel reports 30

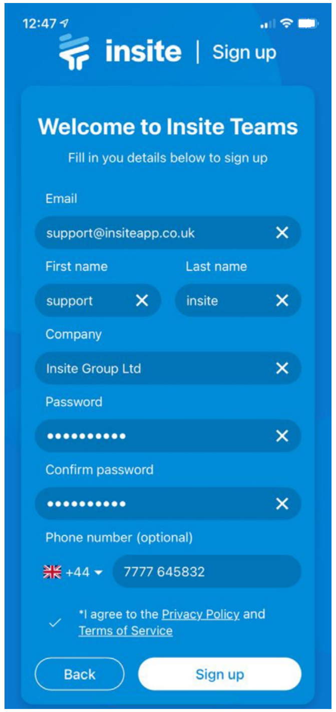
List templates
- Creating list templates 31
- New list from template 32

Sign off & archive lists
- Sign off a list 33
- Archive a list 34

Account set up

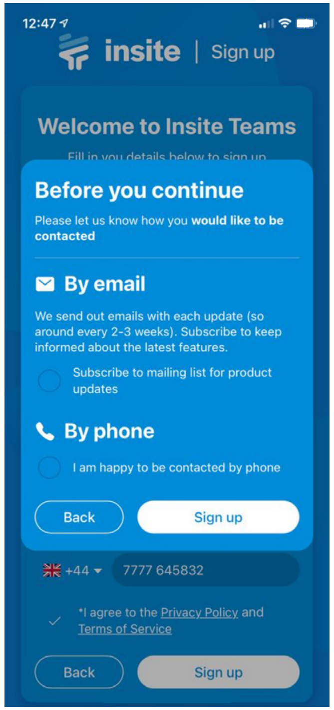


1. Enter your email



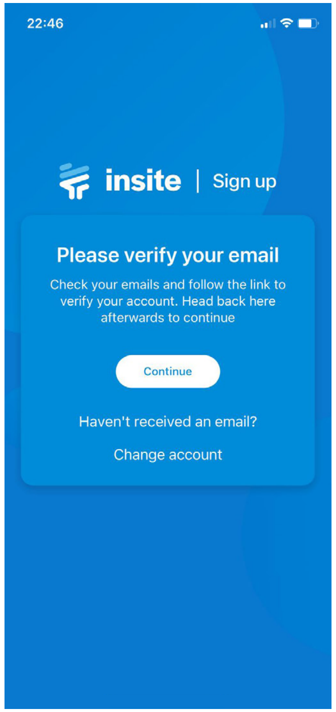
2. Provide your details

Enter your details then read and accept our Privacy Policy and Terms of Usage.



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:

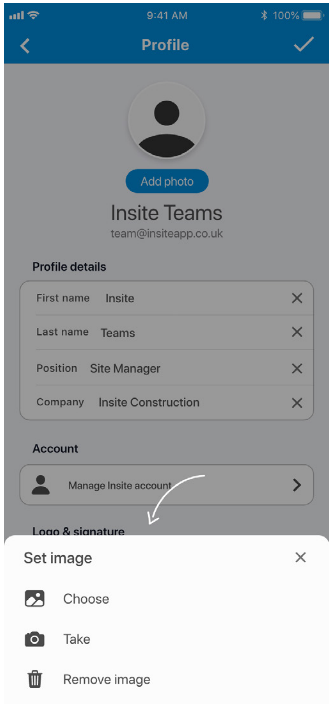
teams.insiteapp.co.uk

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

App Store for iPhones & iPads

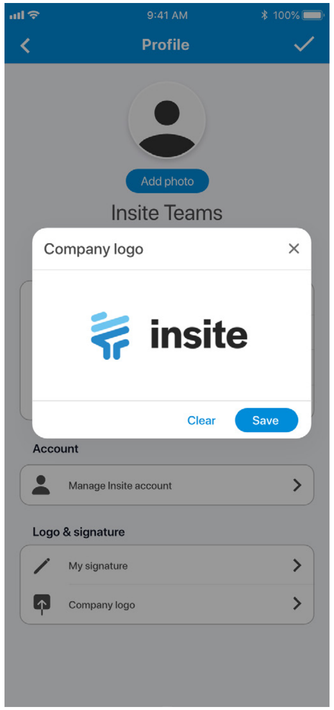
Play Store for Android phones & tablets

Profile



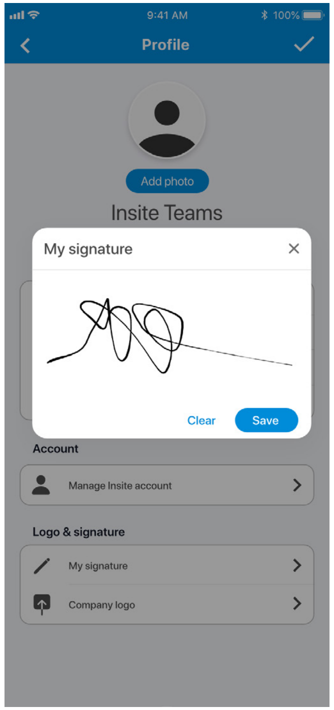
Add a profile photo

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



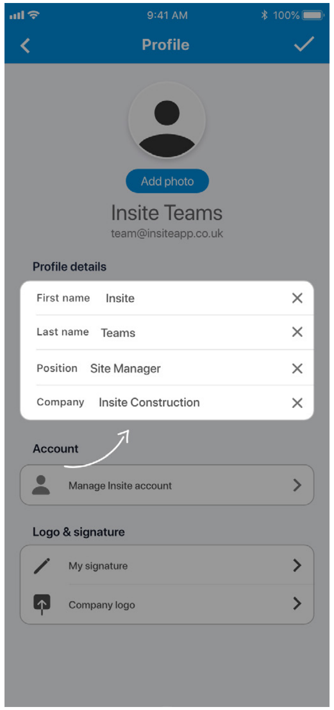
Add a company logo

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



Add a signature

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



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:

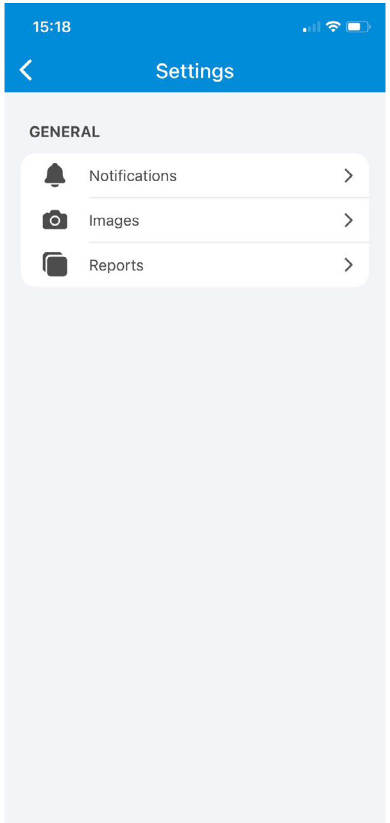
[Update Profile Image]

[Company Logo]

[Signatures]

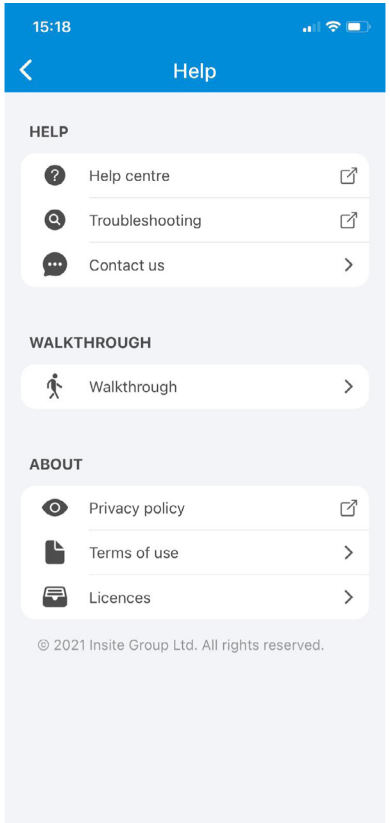
[Update Details]

Settings, help & feedback



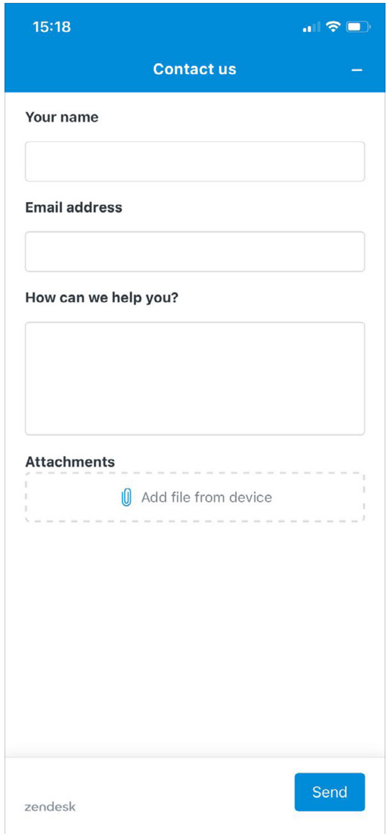
Update your settings

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 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

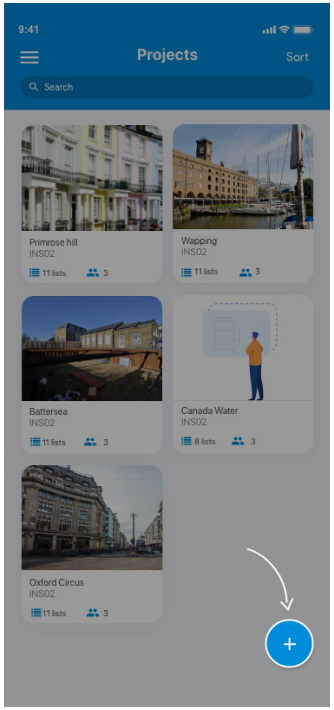
Image settings

Report settings

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

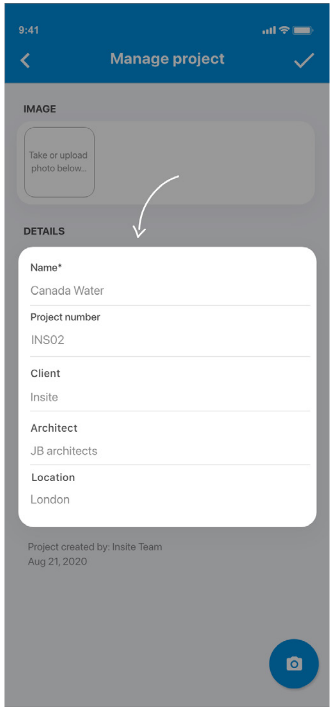
Insite Help Centre

Project: Create a project



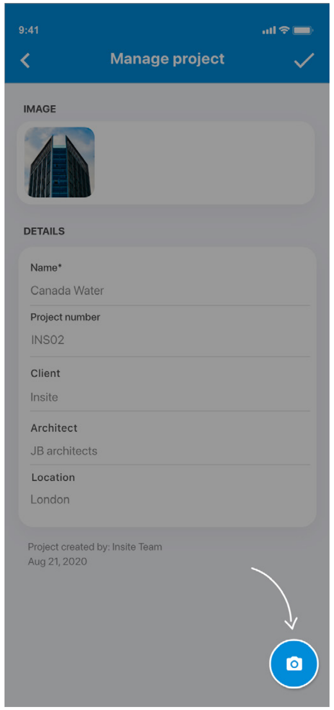
1. Create a new project

Tap the **blue plus** on the **Home** page to get started.



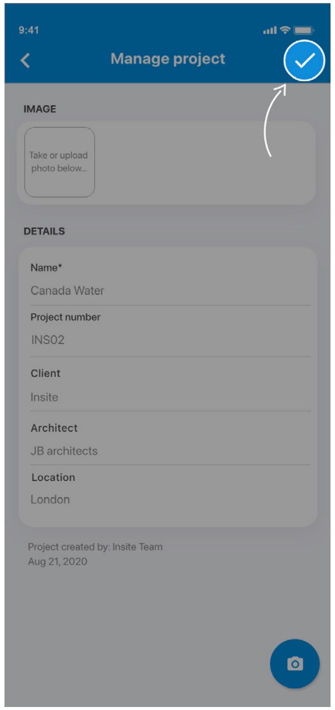
2. Populate the details

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.



4. Save

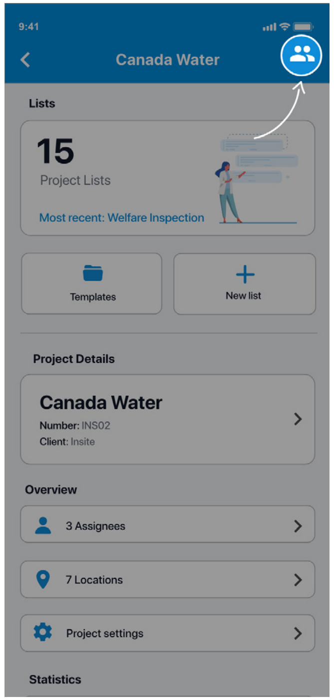
Tap the **tick** to save your new project.

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:

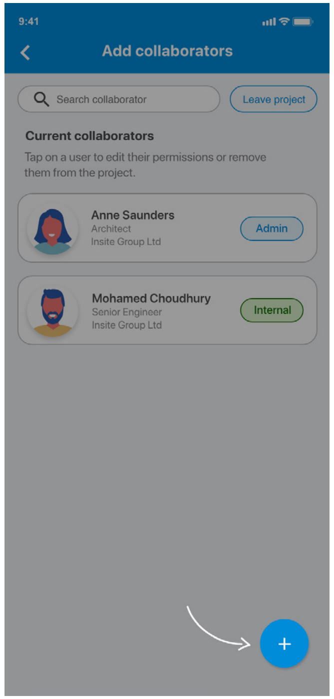
[Create a project]

Project: Adding users from your organisation



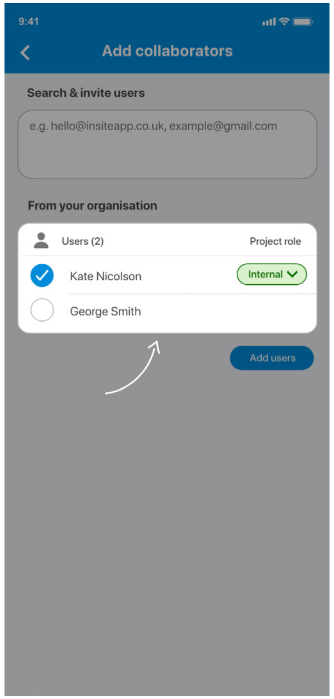
1. Go to collaborators

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



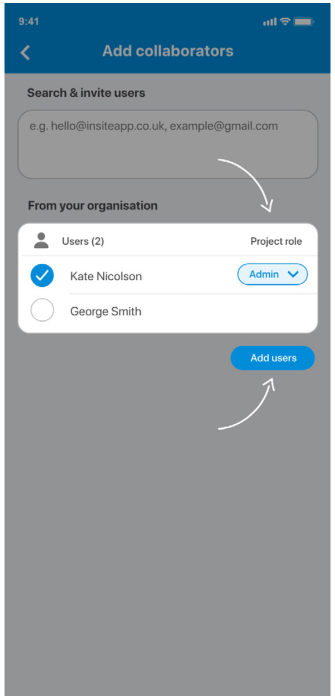
2. Start inviting

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



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.

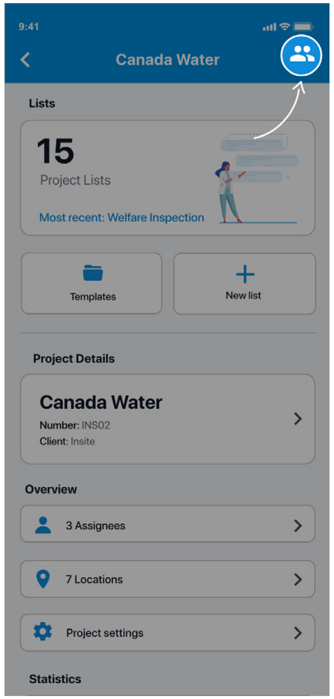
For more information on managing the Organisation list or adding users to your project please visit:

Adding & invite users to your project (Premium plans)

Adding & invite users to your project (Starter plans)

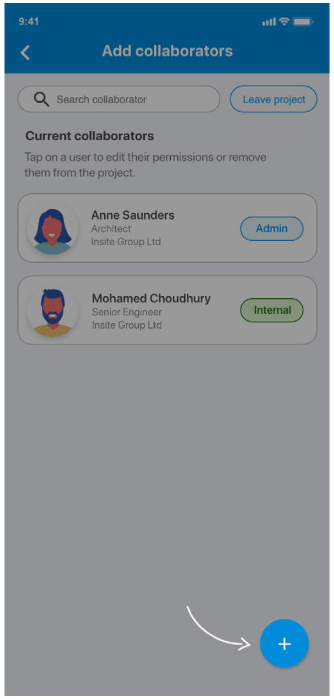
Managing plan members

Project: Search, add & invite users



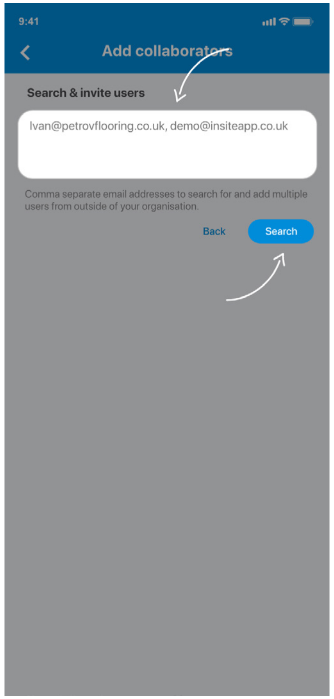
1. Go to collaborators

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



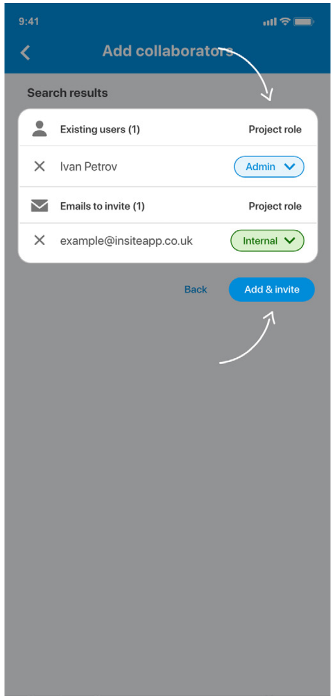
2. Start inviting

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



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.

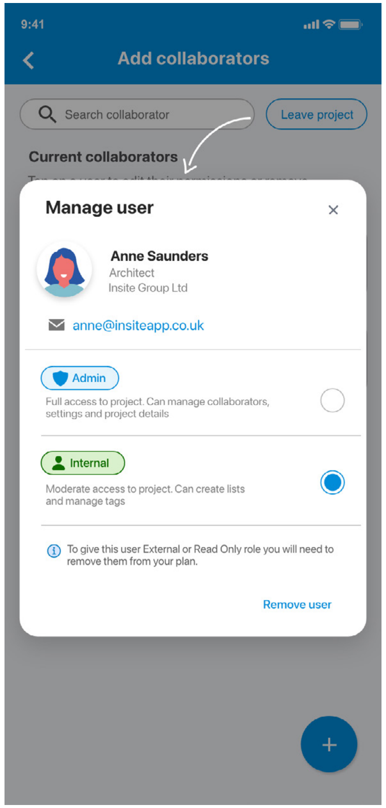
For more information on setting up internal and external users and managing their permissions visit the links provided below:

[Adding & invite users to your project (Premium plans)]

[Adding & invite users to your project (Starter plans)]

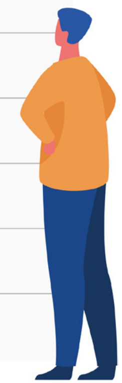
[Managing plan members]

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.**

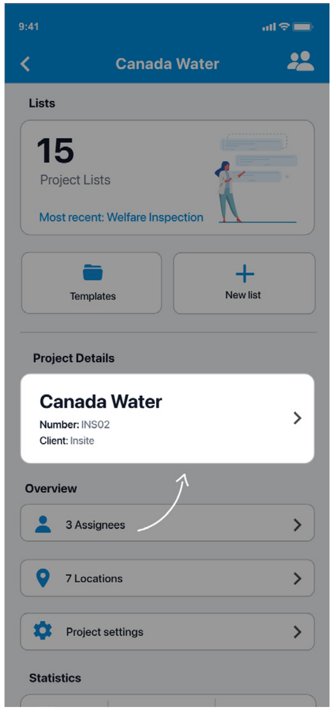
		Project admins	Internal	External	Read only
Project	View project	✓	✓	✓	✓
Project	Manage project details, settings & status	✓	✗	✗	✗
Project	Add & remove collaborators and update their roles	✓	✗	✗	✗
Lists	View lists	✓	✓	✓	✓
Lists	Create lists	✓	✓	✗	✗
Items	View items	✓	✓	✓	✓
Items	Add items	✓	✓	✓	✗
Items	Add photos and comments	✓	✓	✓	✗
Items	Update item details, assignees & locations	All items	Their own items	Their own items	✗
Items	Update item status	All items	Their own items	Their own items	✗
Items	Create status requests	×	Other users' items	Other users' items	✗
Items	Approve & reject status requests	All items	Their own items	Their own items	✗



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

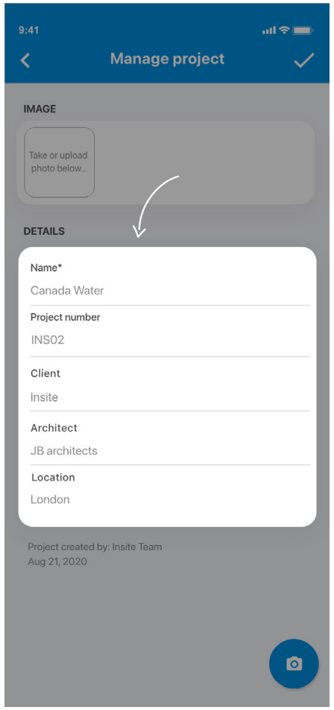
User roles & permissions explained (Premium plan)
User roles & permissions explained (Starter plan)

Project: View & update details



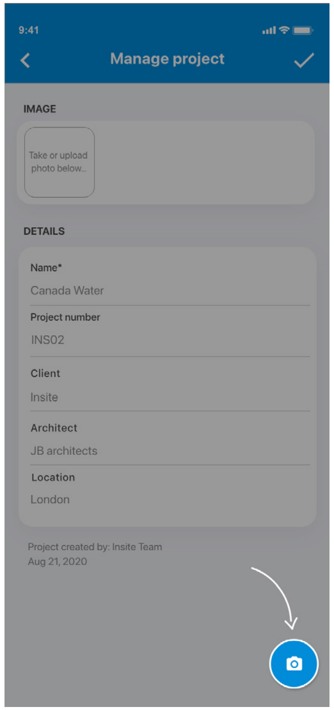
1. View details

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



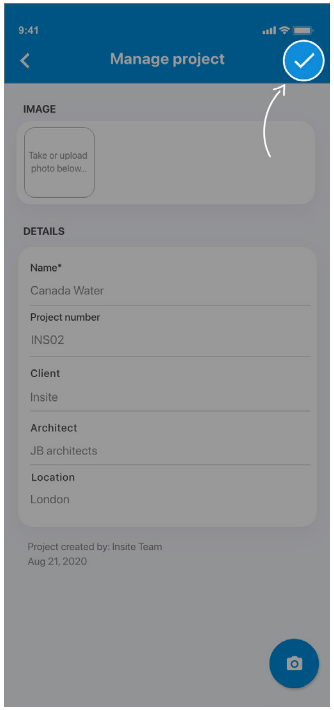
2. Edit the details

Edit the details in the input fields under the **Details** heading.



3. Update the image

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



4. Save

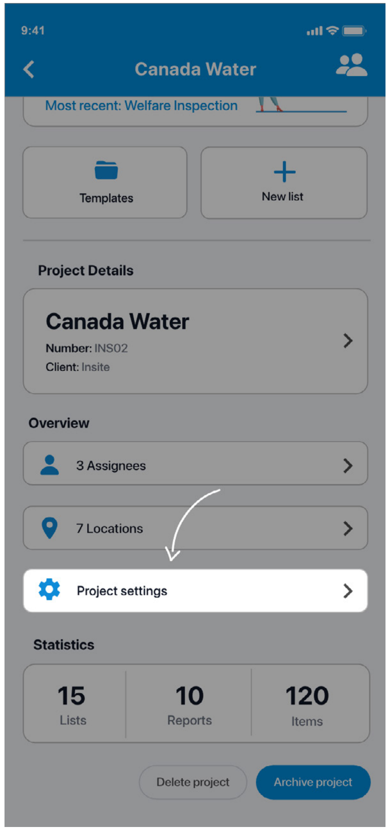
Tap the **tick** to save your new project details.

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:

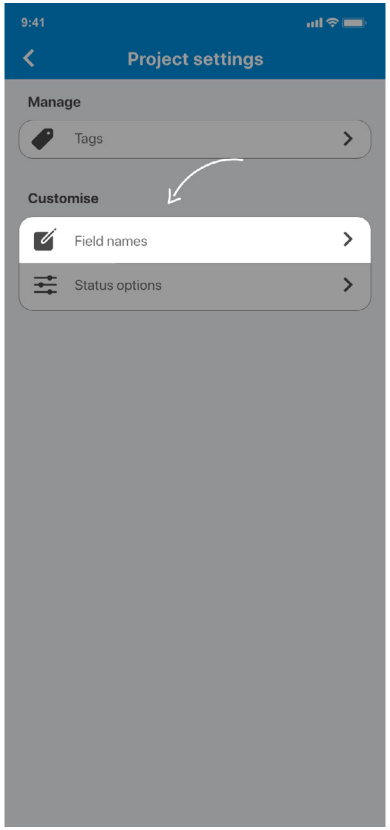
Update project details

Project: Customise field names



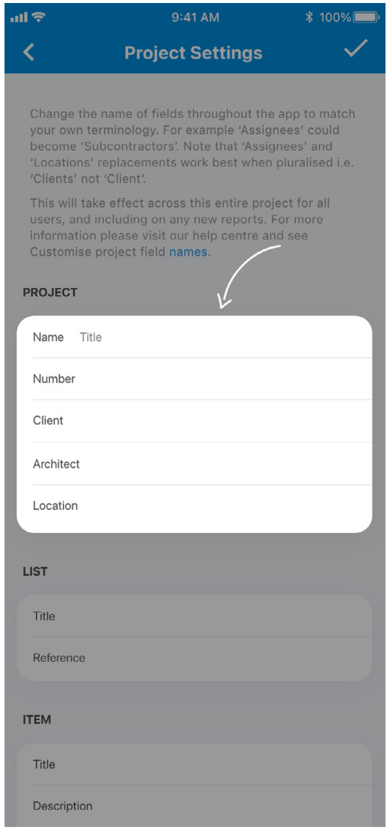
1. Go to project settings

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.



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.

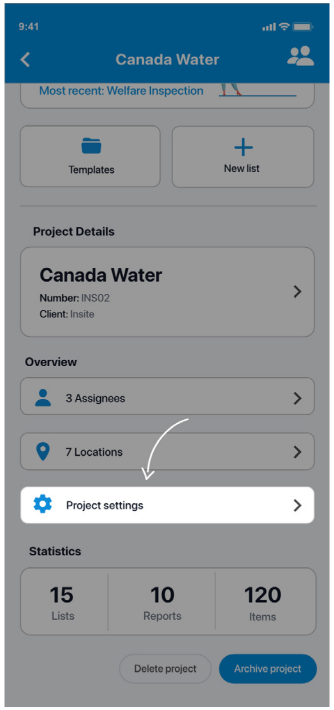
If you find that some custom terms are already set up then it could be that your plan admin has set these in the Admin Console. You can still override them at a project level if required.

For more information on custom field names please visit:

Custom Field Names

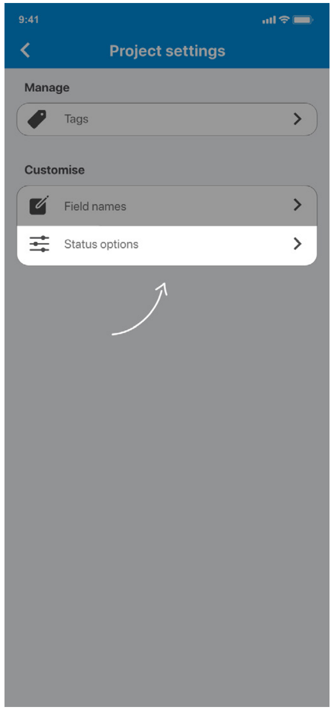
insite TEAMS

Project: Customise status options



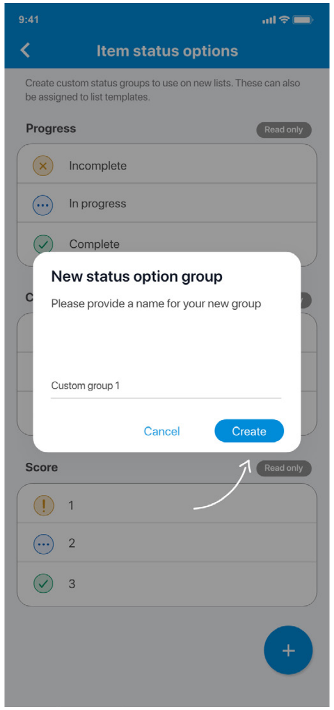
1. Go to project settings

Tap on **Project Settings** at the bottom of the project dashboard page.



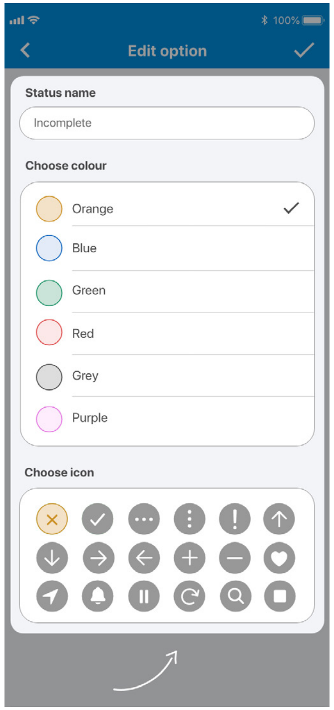
2. Open status options

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.

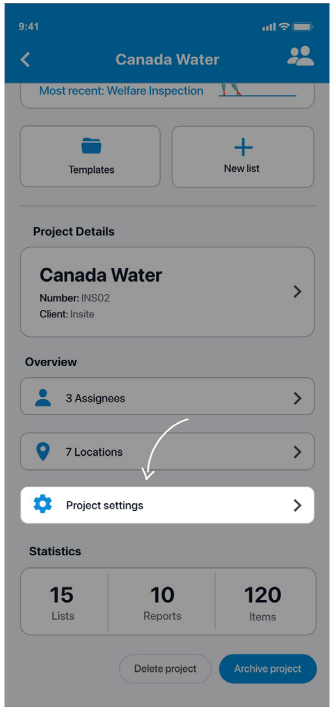
With Insite you can create custom status groups to align the app to your processes.

For more information on custom status groups please visit:

[Custom status options]

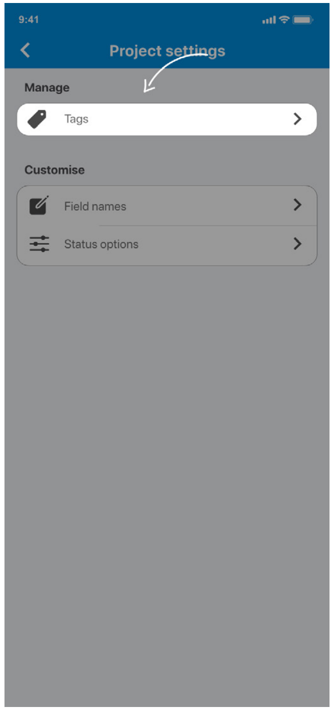
[Using custom status groups]

Project: Add & manage tags



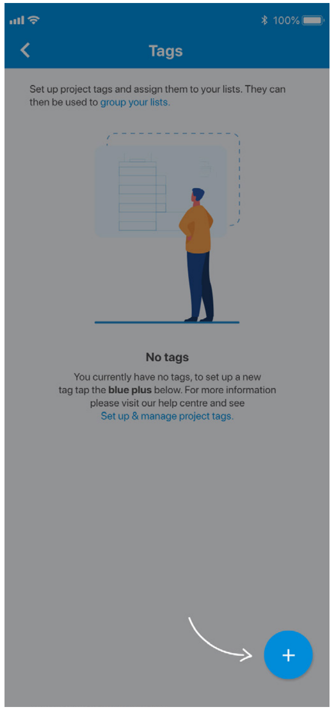
1. Go to project settings

Tap on **Project Settings** at the bottom of the project dashboard page.



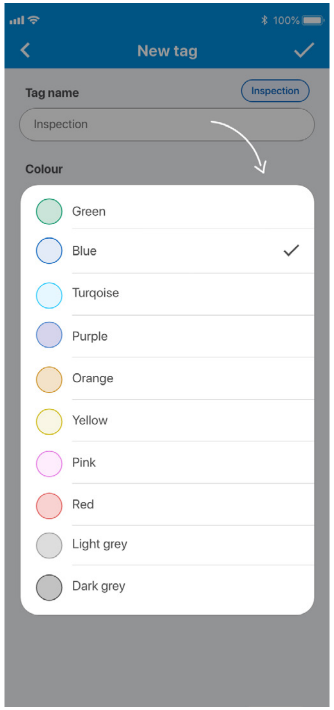
2. Open tags

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.



4. Save

Provide a name and 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**.

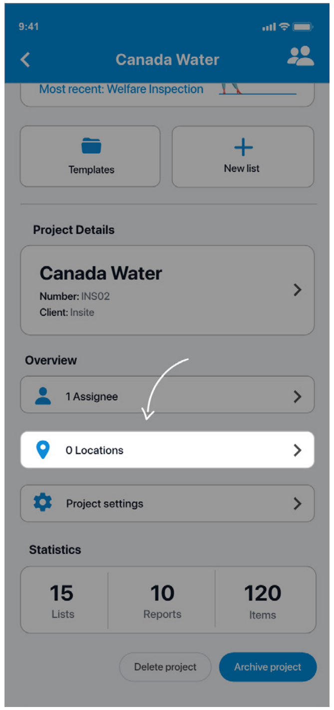
Tags can be used to group your lists. This adds an extra layer to the hierarchy of your project; e.g. without tags the structure is Project > Lists and with tags the structure can become Project > Tags > Lists.

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

[Set up & manage project tags]

[Assign & remove list tags]

Project: Manage locations & drawings

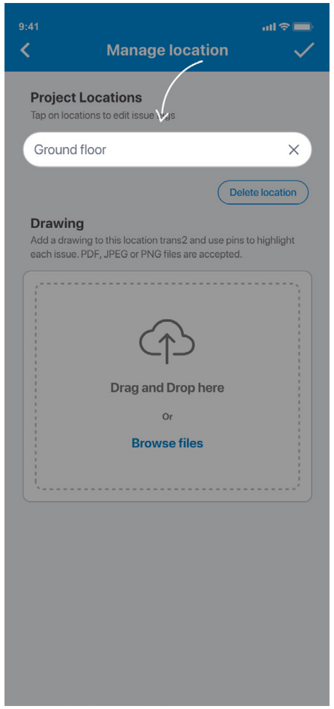


1. Go to project locations

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

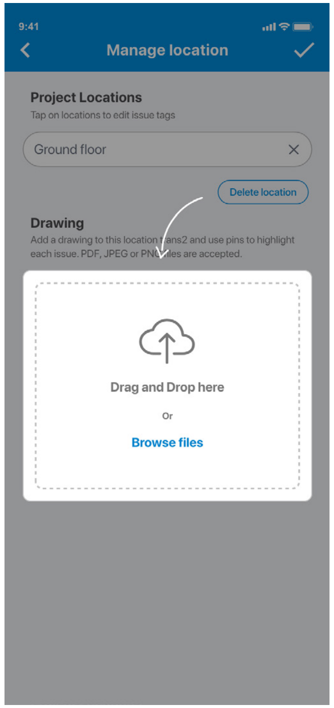
2. Add a new location

Tap the **blue plus** to create a new location.



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.

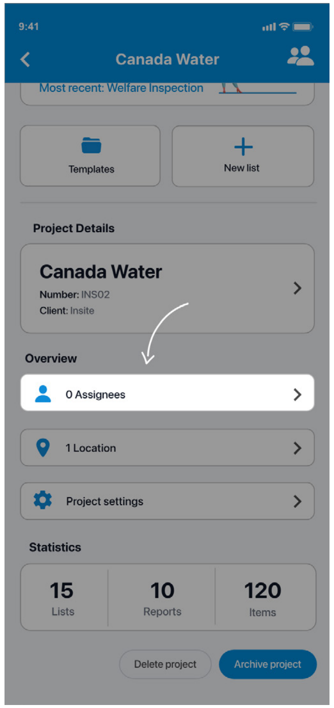
You can also add drawings to locations so that you can pinpoint items for additional clarity, this feature is only available on Premium plans.

For more information on managing locations please visit:

[Managing Locations]

[Add location drawings & manage their details]

Project: Manage assignees & link to users

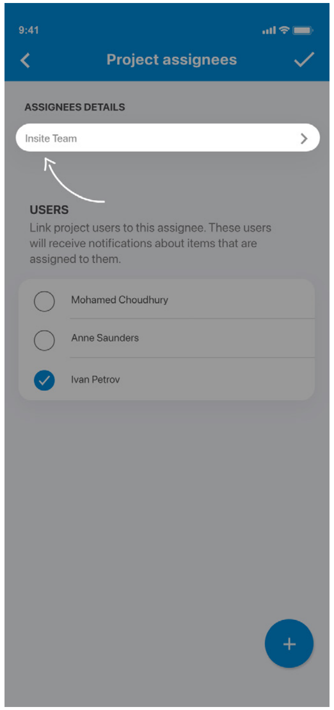


1. Go to assignees

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

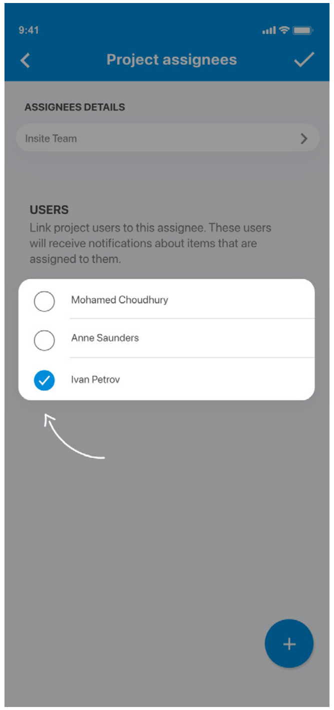
2. Add a new assignee

Tap the **blue plus** to create a new assignee.



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.

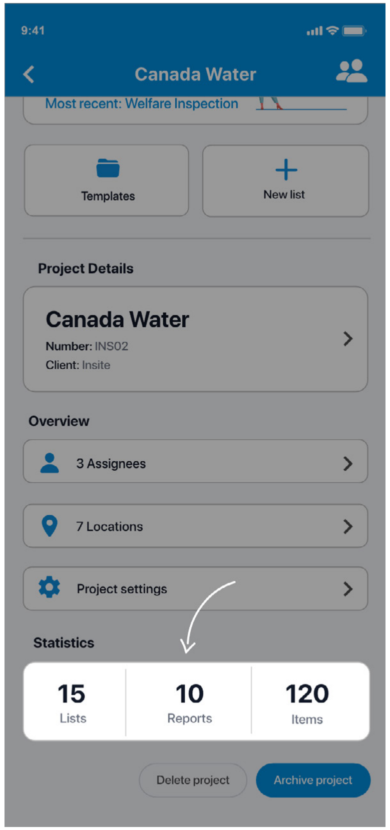
You can also tag users to assignees so that they will receive notification updates when they are assigned to an item, as well as further notifications when that item is updated.

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

Managing Assignees

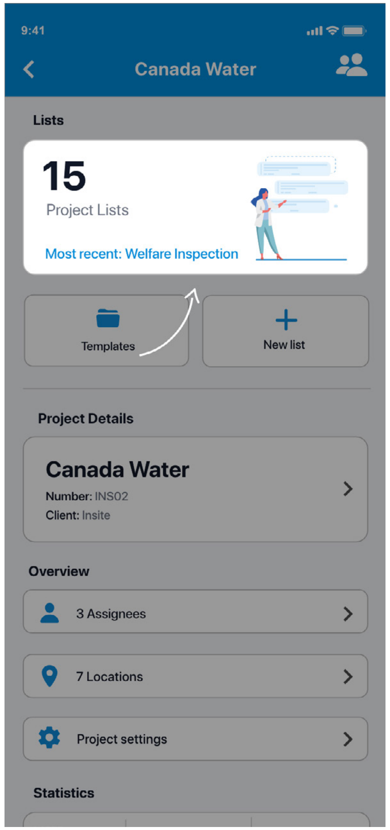
Linking Users

Project: View lists & statistics



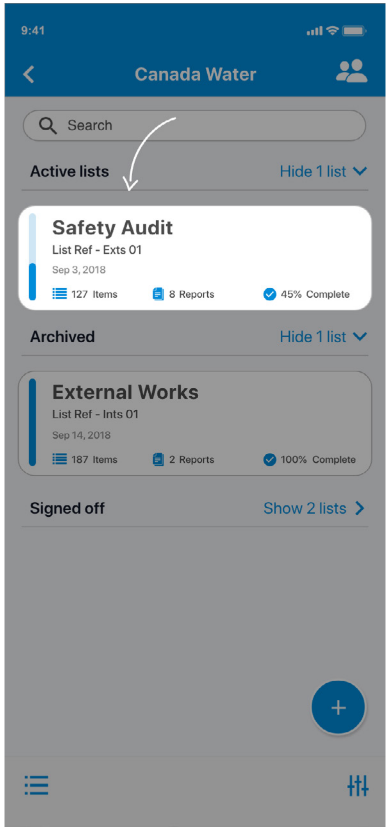
Stats & vitals

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.



Viewing your lists

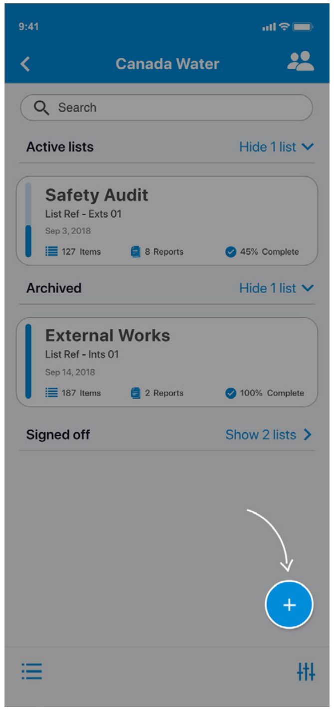
You will now be presented with all of the lists in the project. See overleaf for creating new lists.

Your project contains your lists and information.

For more information on the project dashboard page please visit:

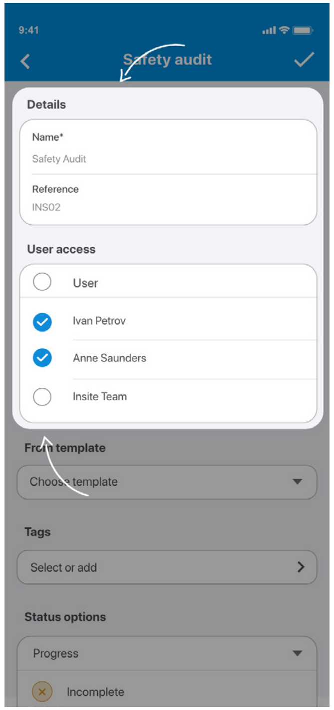
[View project dashboard]

List: Create a list & set it's privacy



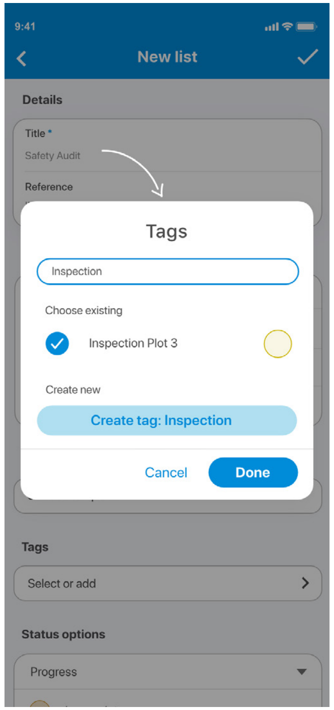
1. Create a new list

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



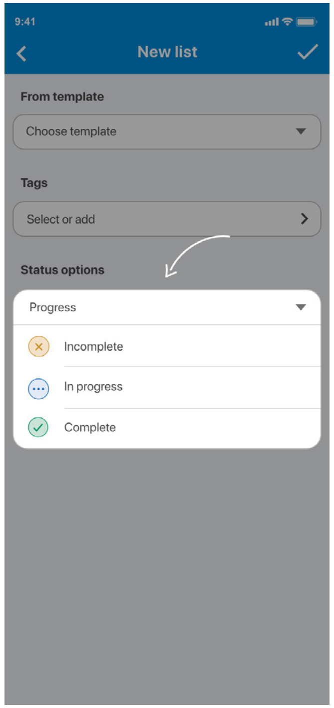
2. Populate the details & select who has access

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



3. Add tags

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

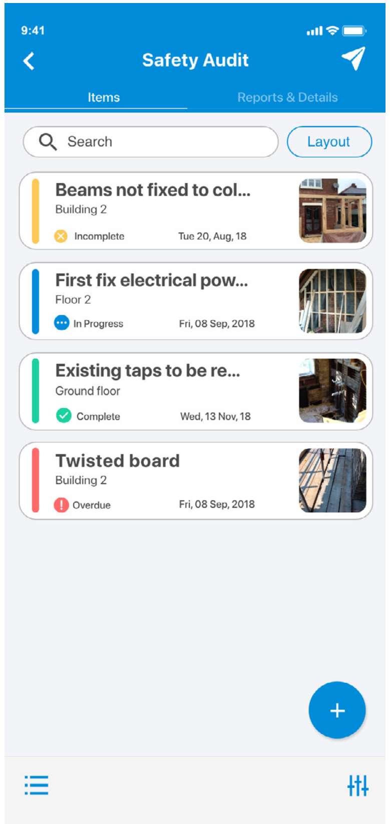
Your lists are split into two tabs. Your items are displayed under the **Items** tab. Under the **Reports & Details** tab you will find your reports and the list information.

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

[View list information]

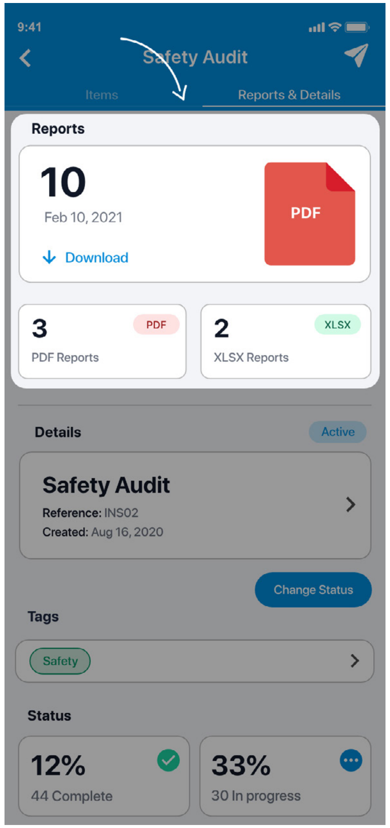
[View a report]

[View list activity]



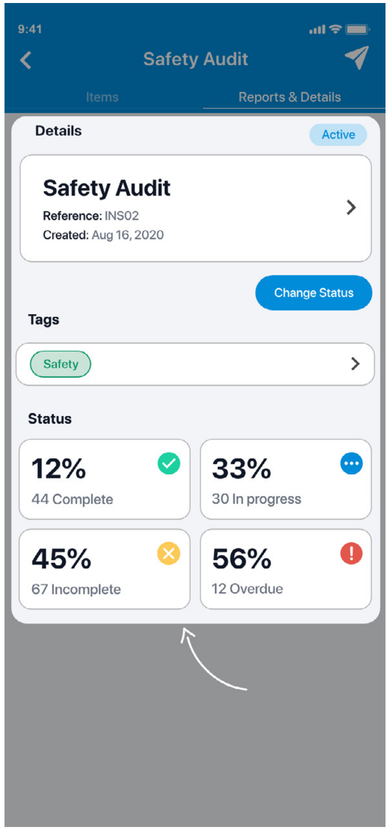
Your items

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



Report storage

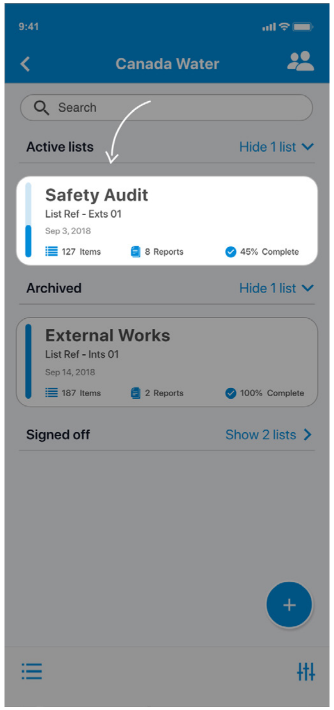
All reports are contained within the **Reports & Details** tab. The most recent is shown at the top, old reports are in the archive folders.



Viewing list information

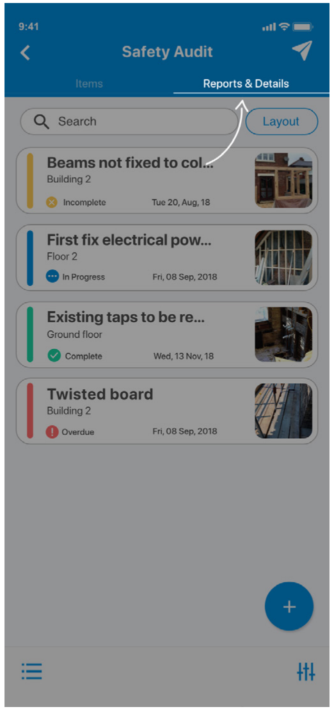
Tap the **Reports & Details** tab to view list information. You will now be presented with various information about the list.

List: View & update details



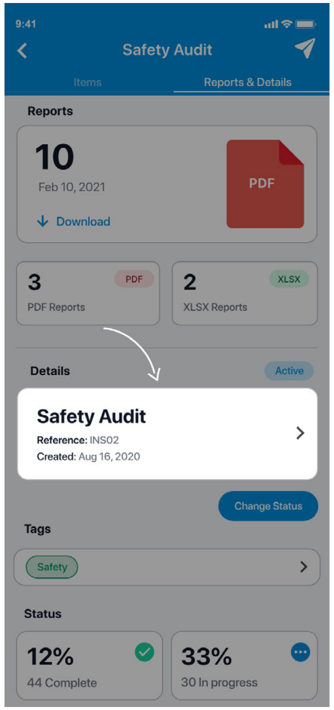
1. Open the list

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



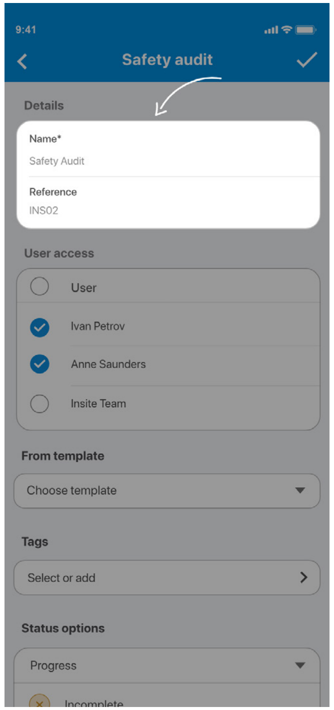
2. Go to Reports & Details

Tap the **Reports & Details** tab above the search bar.



3. View details

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



4. Edit the details

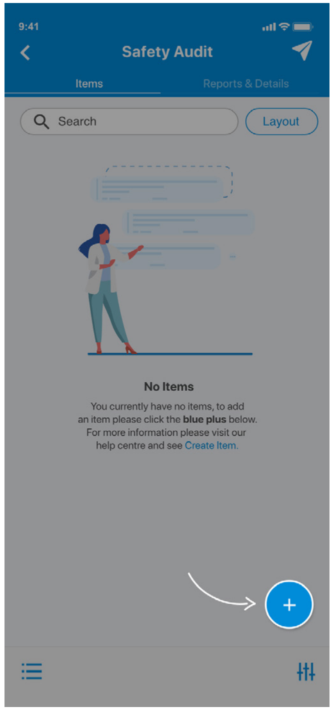
Edit the details in the input fields under the **Details** heading. Tap the **tick** to save your new list details.

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:

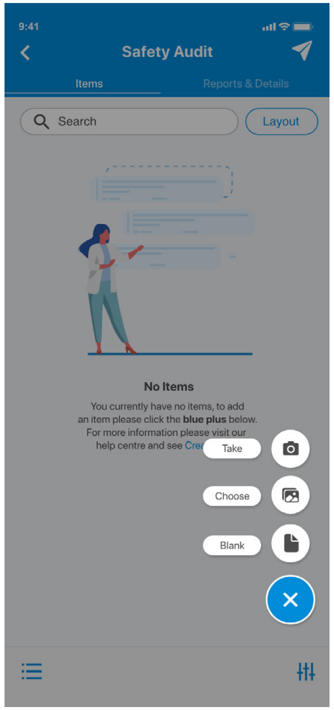
[Managing lists]

Items: Create items



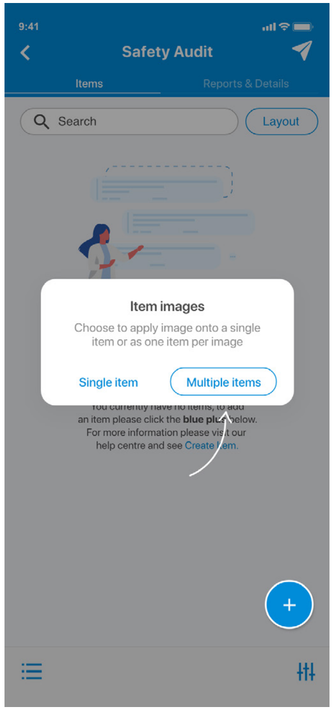
1. Create a new item

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



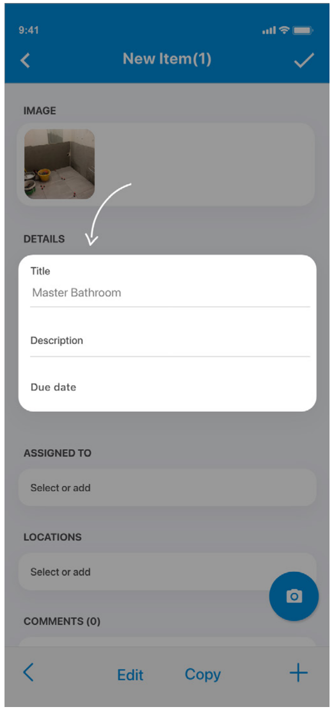
2. Select an option

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.

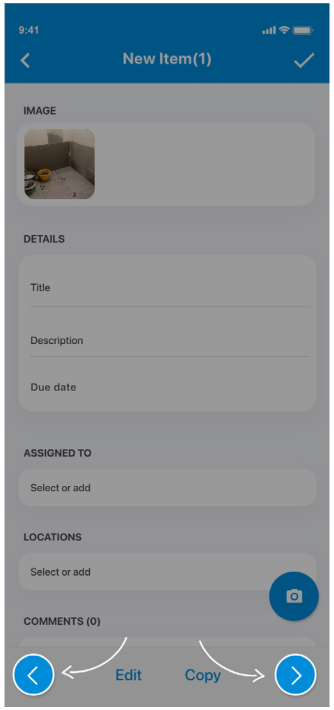
You can create items in a few different ways with Insite:

- 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:

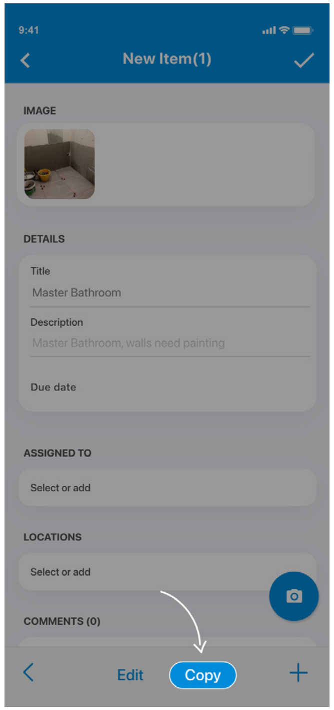
[Create an item]

Items: Add multiple & copy information



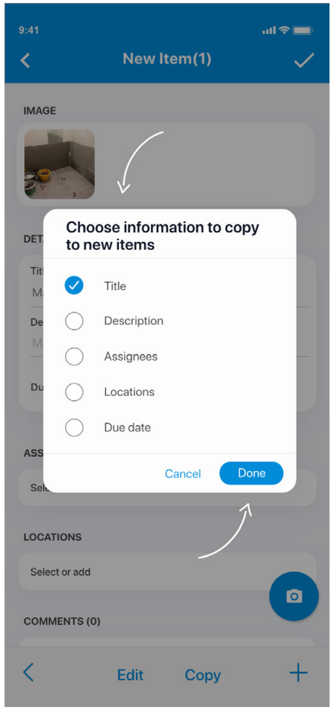
Use the arrows

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.



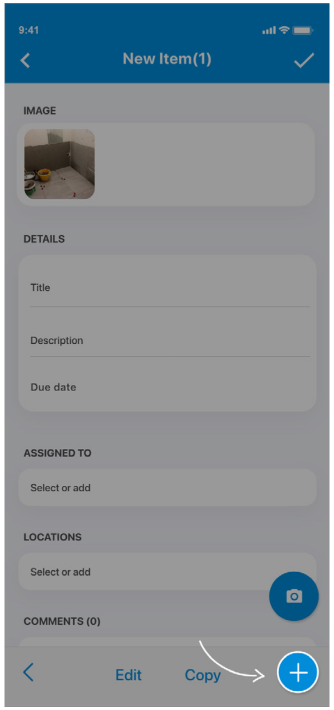
1. Copy info across

You can copy information from the last item over to the next item. Start by tapping **Copy** on the bottom toolbar.



2. Select fields to copy

Check the fields which you would like to copy across 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:

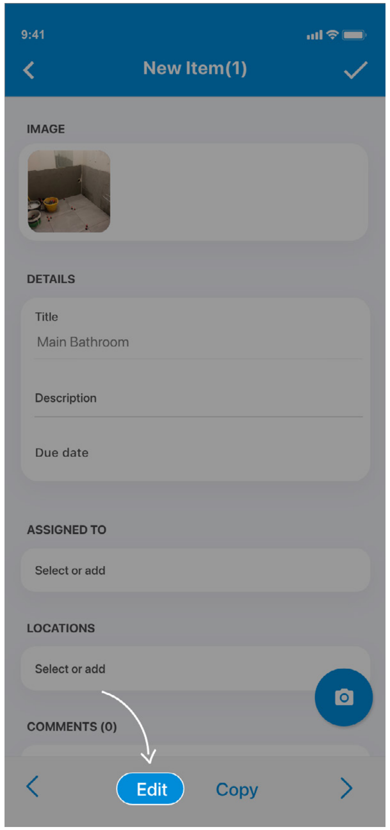
[Adding multiple and copying info]()

Items: Edit multiple items in feed

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.

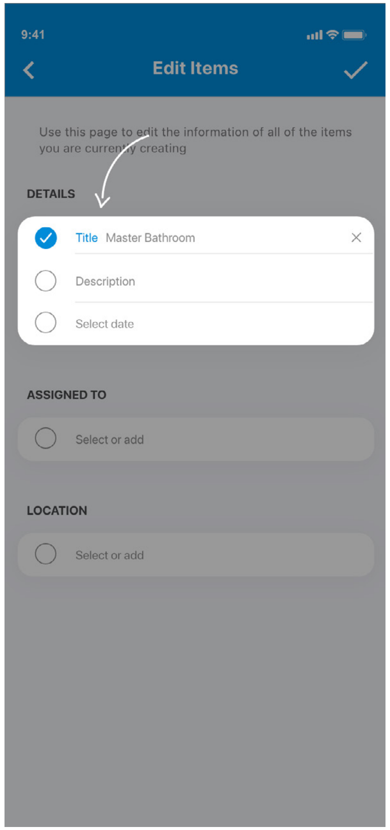
For more information on editing multiple items in the feed please visit:

[Edit multiple items in feed]()



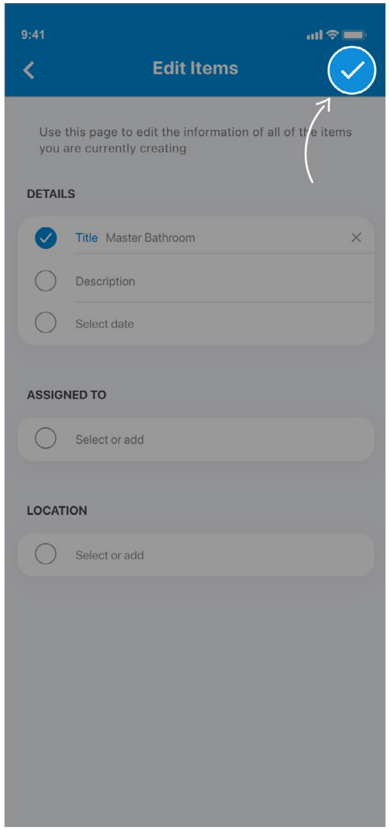
1. Open the multi-edit page

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



2. Enter details to apply

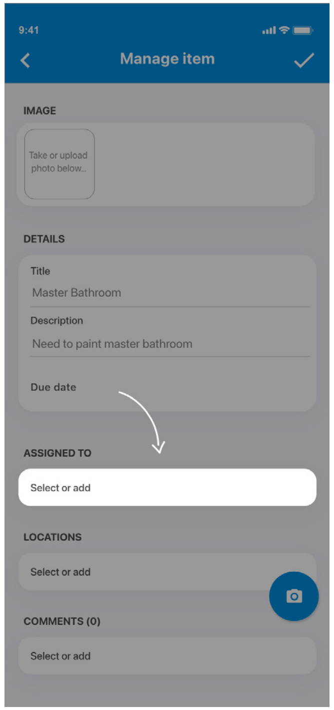
Enter details which you would like to apply to all of the current items in the new items feed.



3. Update all items

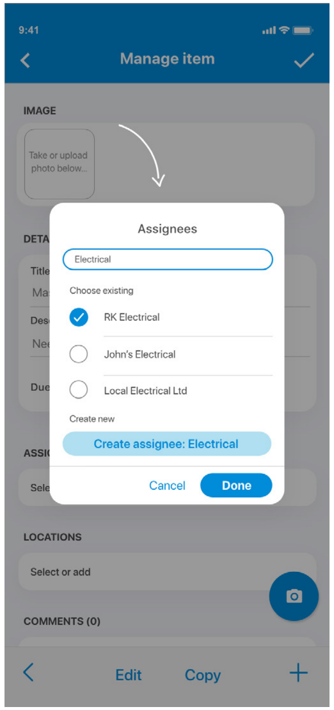
When you are done make sure the checkboxes are checked for the fields to update and tap the **tick** to update all of the feed items.

Items: Assign items to assignees & locations



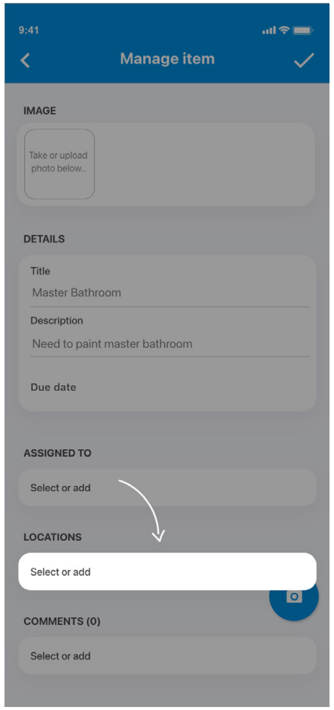
1. Open assignee list

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



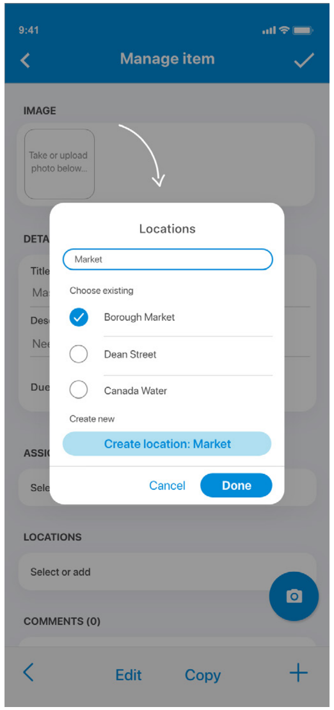
2. Select assignees

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.



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.

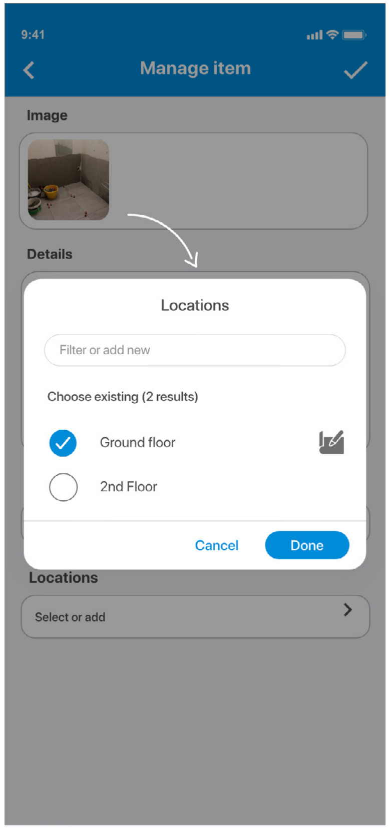
You are able to select as many assignees and locations as you would like for each item and you can update these at any time.

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

[Assign items to assignees]

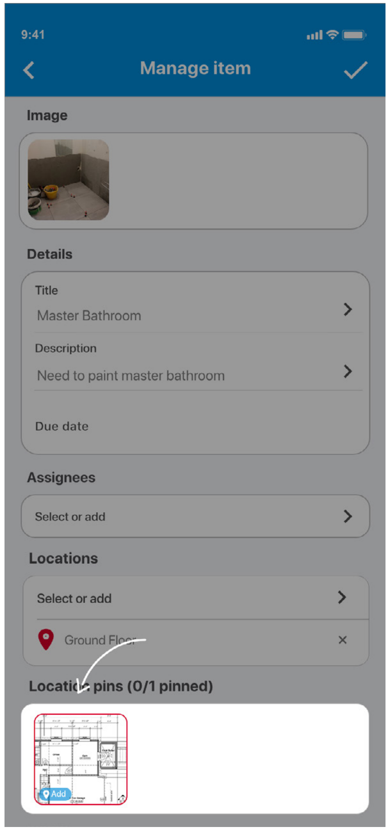
[Assign items to locations]

Items: Pinpoint items on location drawings



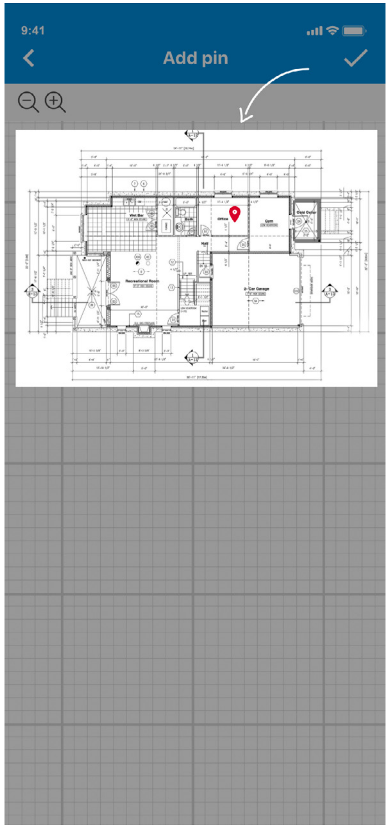
1. Add locations

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.

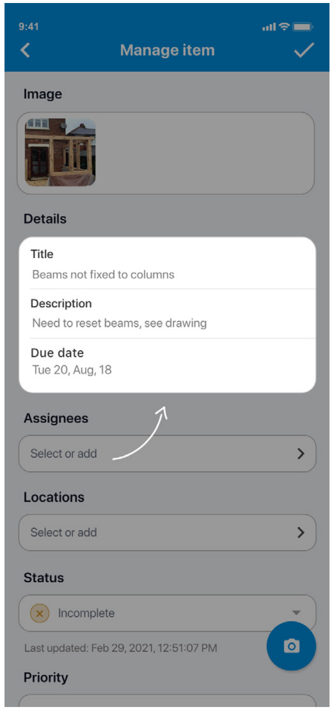
The pins will be displayed on your reports too.

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

[Pinning items to drawings]

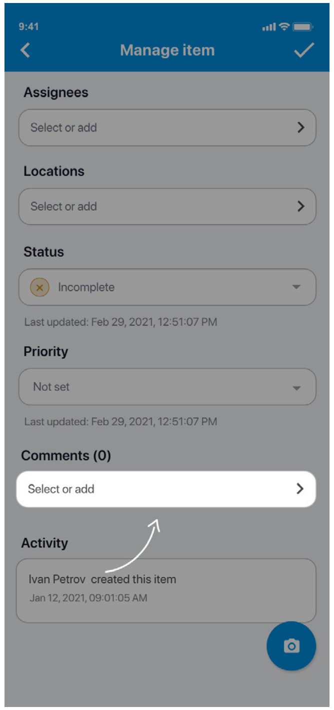
[Add drawings to locations]

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



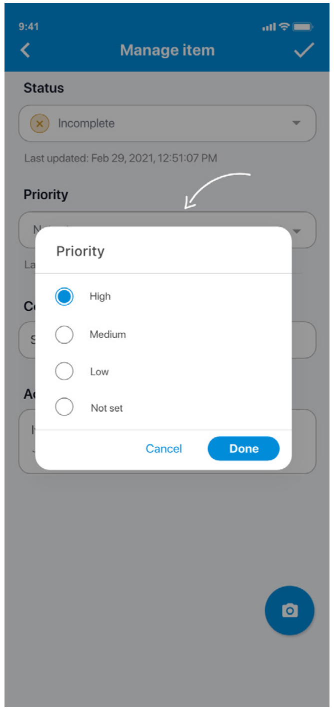
1. Update details

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



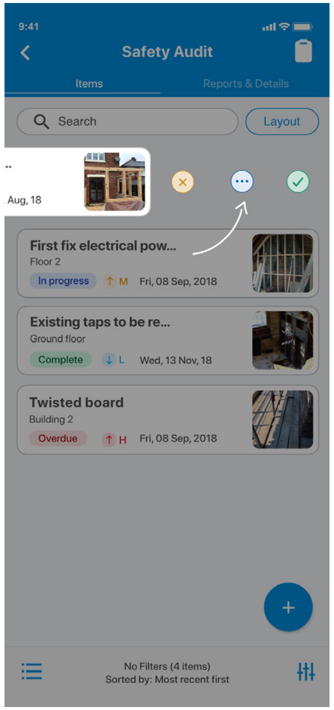
2. Create a comment

Go to the Comments heading and tap **Tap to add comment.**



3. Set priority

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

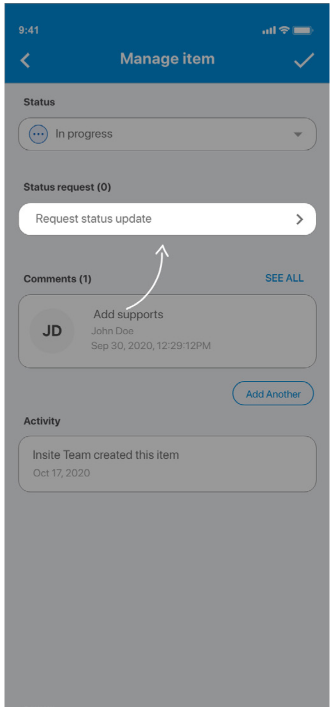
If you are unable to change the status of an item then you can request a status update instead.

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:

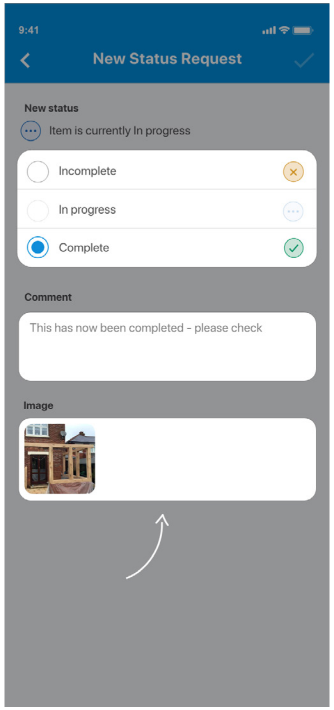
[Request a status update]

[Approve or reject a status update]



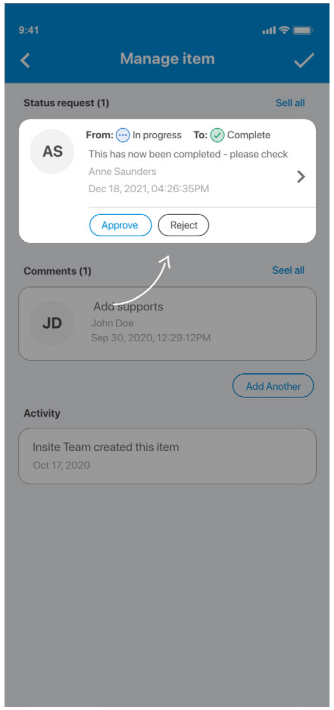
1. Create a new request

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



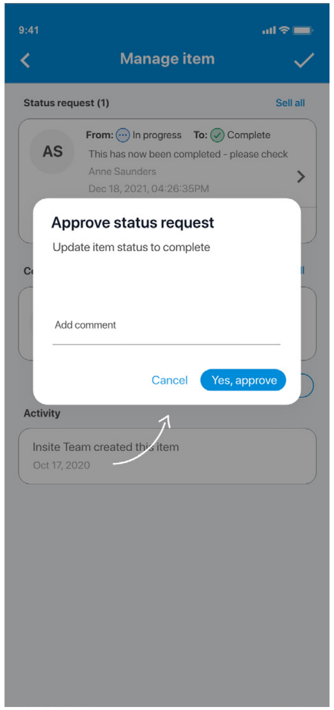
2. Select a status

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

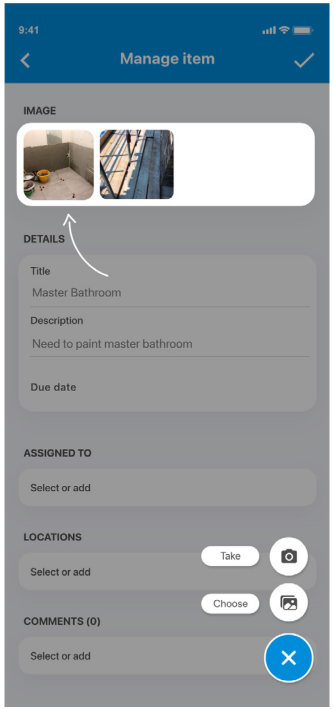
As the item owner or project admin select either **Approve** or **Reject** on a status request within an item.



2. Confirm decision

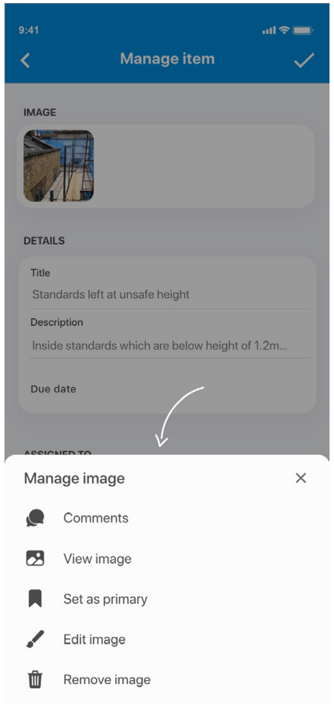
Add an optional comment and confirm your decision.

Items: Add, edit & comment on images



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.

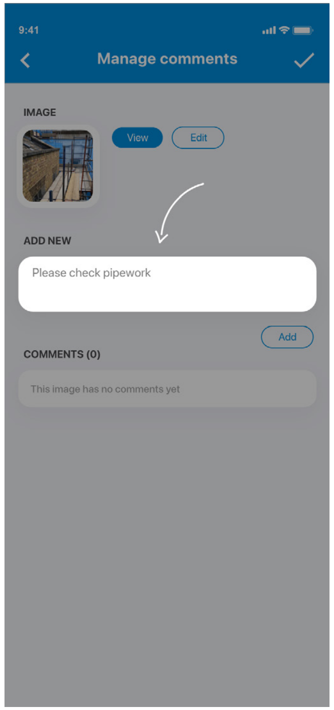


Manage images

Tap on an image to bring up the manage image options.

Edit images

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



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.

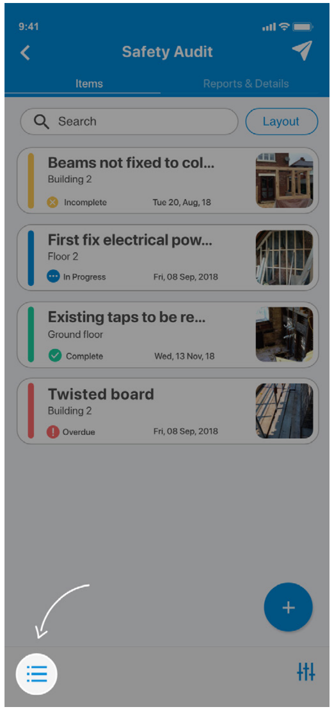
For more information on adding, editing and commenting on images please use the links provided below:

Add, edit and remove images

Comment on images

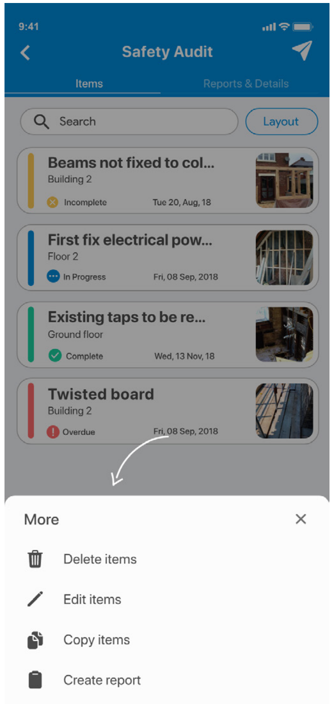
insite TEAMS

Items: Update multiple items



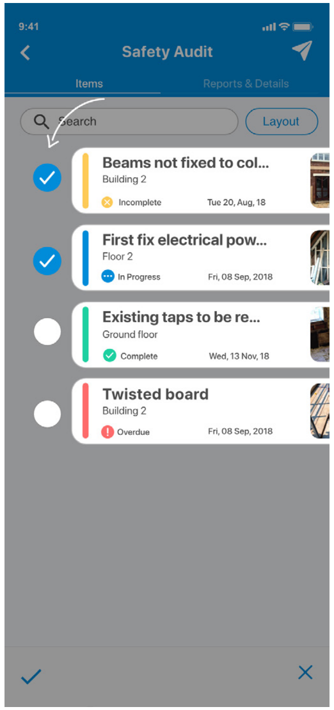
1. Show actions

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



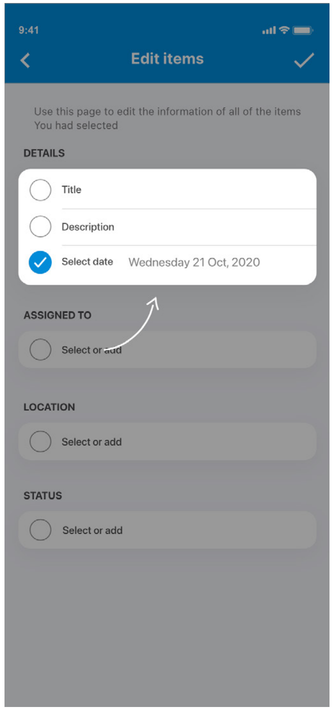
2. Choose edit items

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.



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.

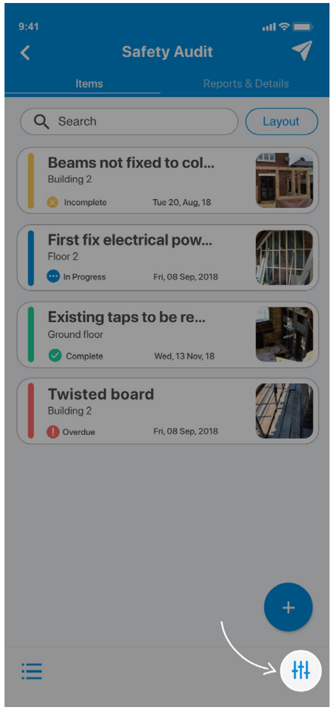
On some lists you are only able to edit items which you have created. This is why you may see the checkboxes disabled (greyed out) next to some items.

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:

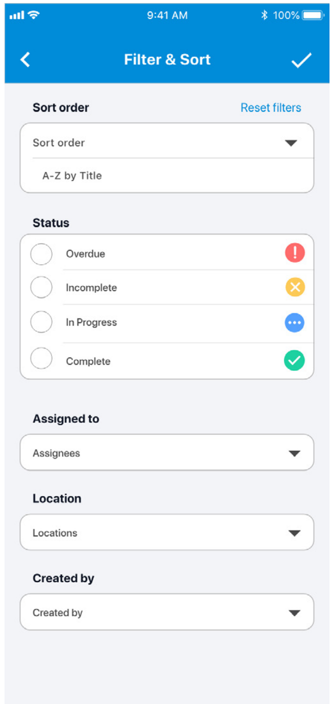
Update multiple items

Items: Filter & Sort



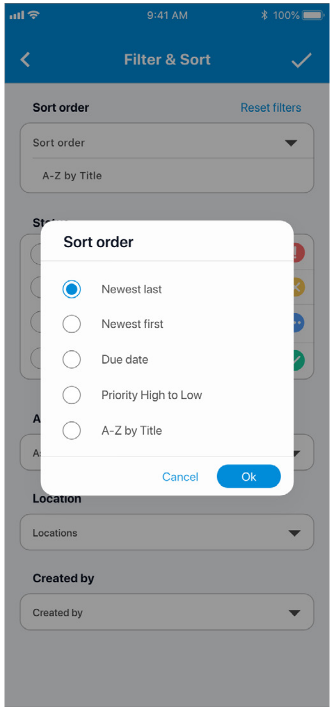
1. Open filter options

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



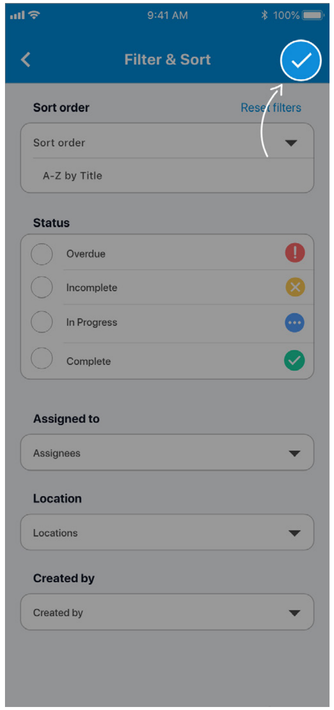
2. Select filters

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



3. Choose sort order

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



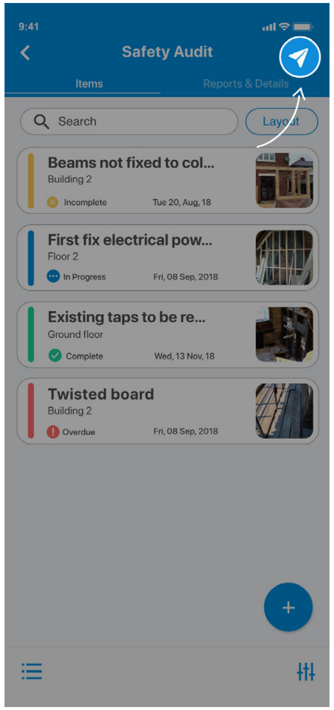
4. Confirm your options

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:

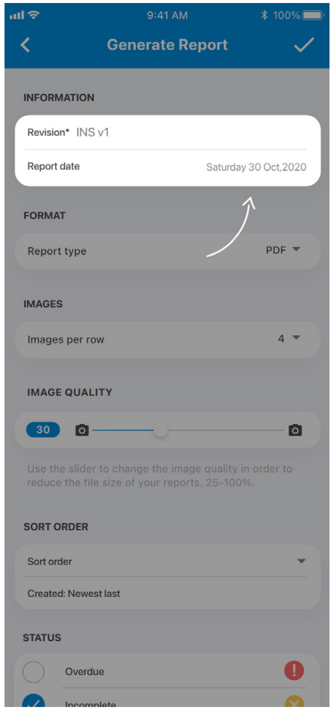
[Filter & sort items]

Reports: Generate PDF & Excel reports



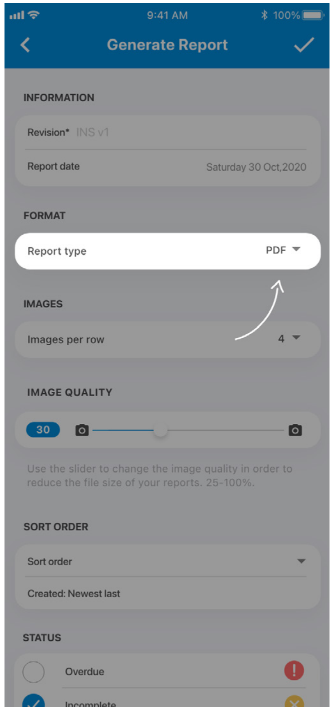
1. Start generating

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



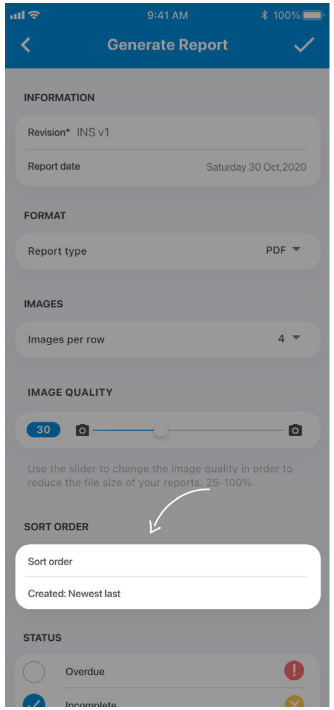
2. Provide a revision

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



3. Choose a format

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



4. Filter & sort

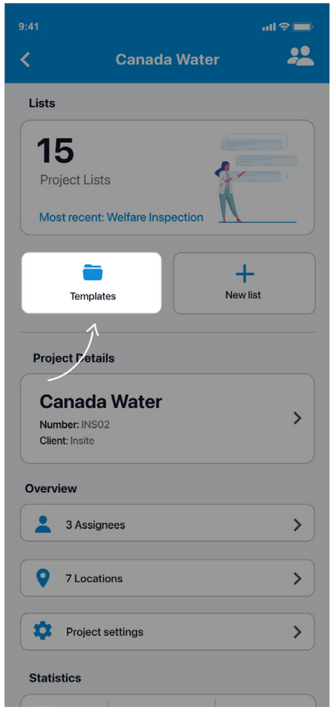
Choose how the items will be sorted in the report and select any filters. Tap the **tick** when you are happy to generate a new report.

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:

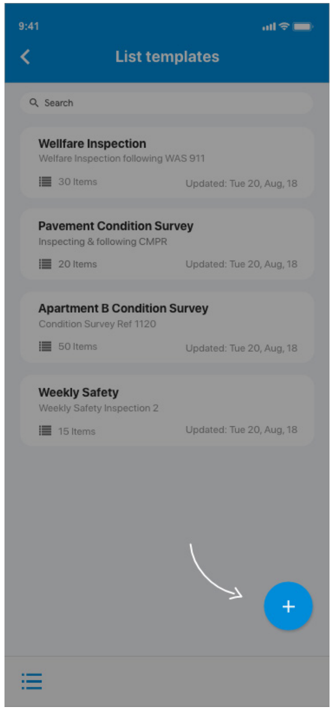
Create a report

List templates: Creating list templates



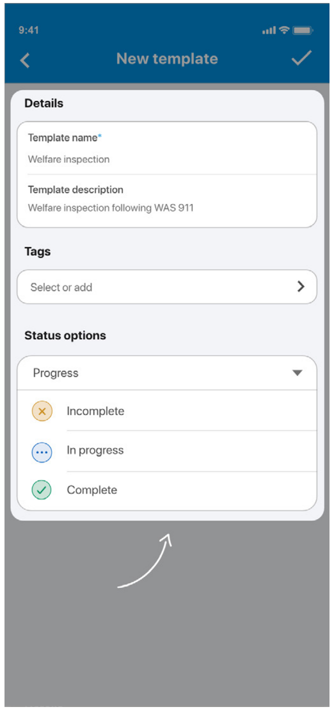
1. Open list templates

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



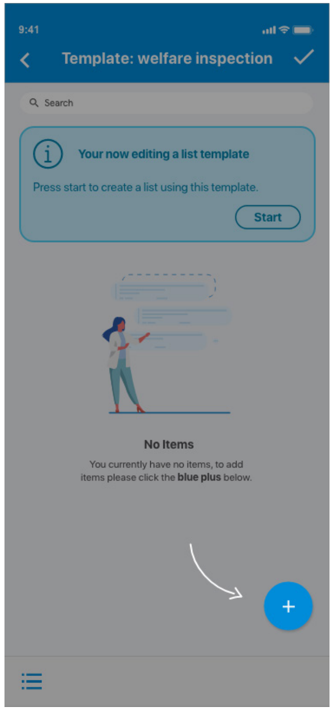
2. Create new template

Tap the **blue plus** to get started.



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

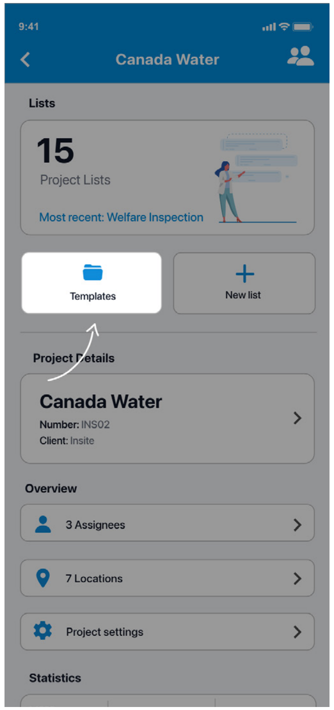
You will now be taken to the new template. Use the **blue plus** to create new template items using the same methods described under the **Add items** section of this training pack.

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:

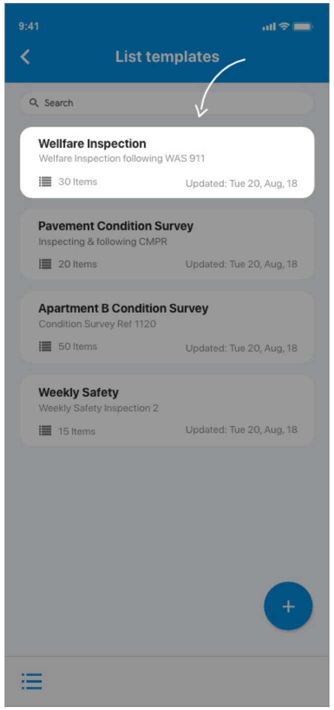
[Create a list template]()

List templates: New list from template



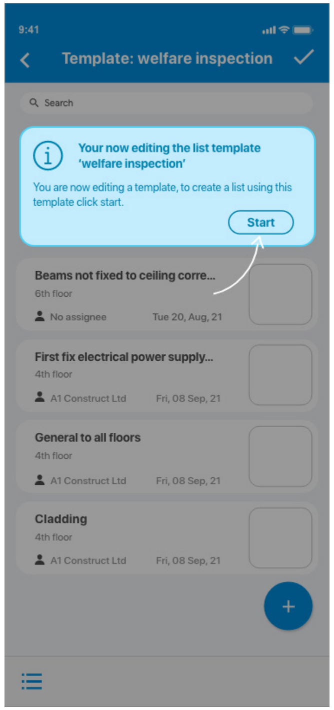
1. Open list templates

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



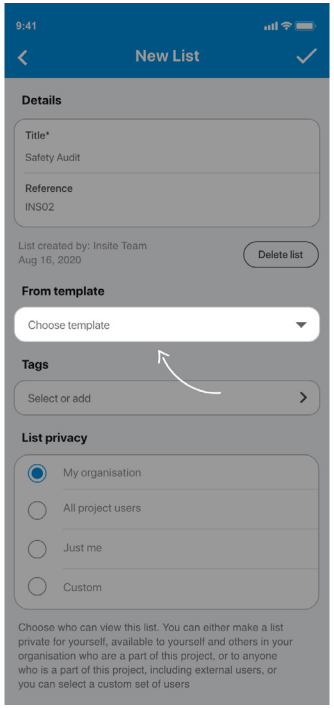
2. Select a template

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



3. Press start

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



Alternatively

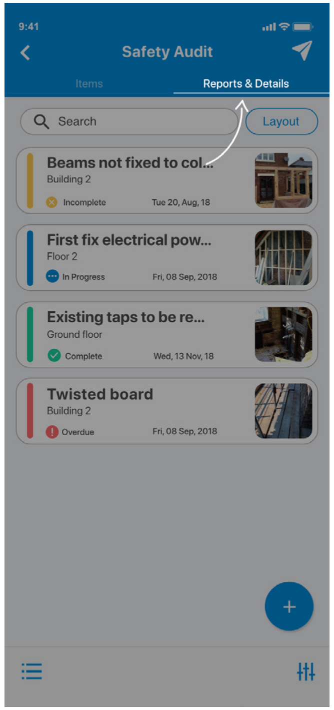
When creating a new list, as per page 12, you can choose a template using the dropdown under the **From template** heading.

For more information on creating new lists from templates please use the links provided below:

[New list from template]

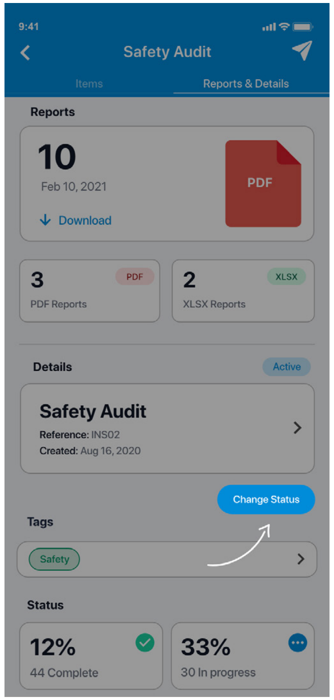
[Create a list]

Sign off & archive lists: Sign off a list



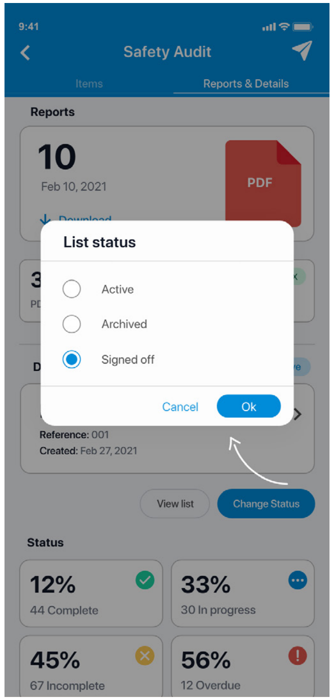
1. Open list

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



2. Press change status

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



3. Sign off

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

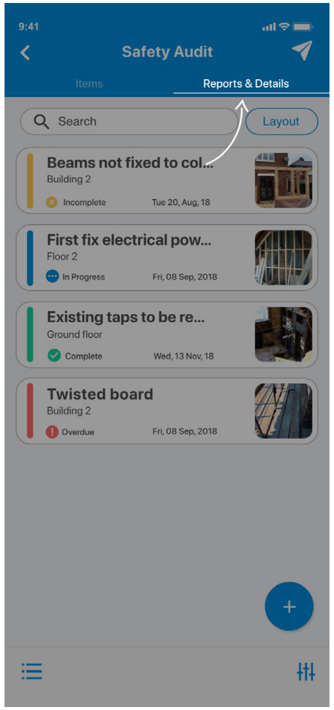
4. Confirm status

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:

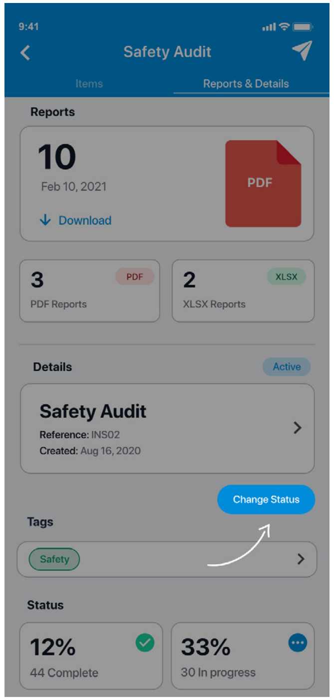
[Sign off & archive list]

Sign off & archive lists: Archive a list



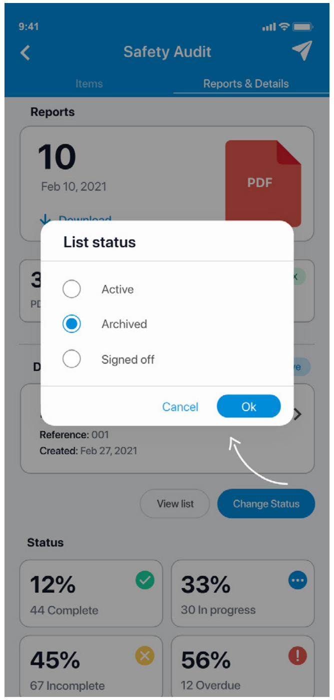
1. Open list

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



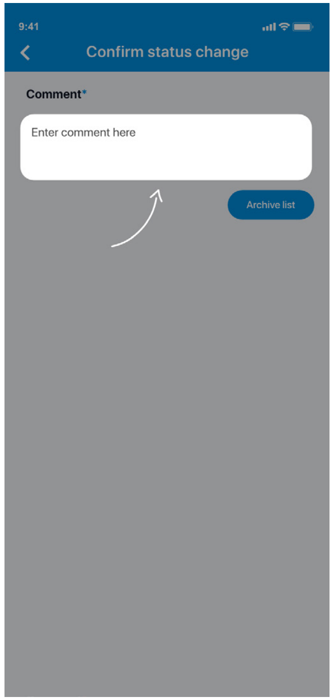
2. Press change status

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



3. Archive

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



4. Confirm status

Add a comment and tap **Archive list** when you are done.

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

Sign off & archive list