



Reference Manual

Archipad version 5.0.7

Who should read this document ?

This document is intended for every one using Archipad or Archipad cloud and who wants to get the most out of Archipad.

We hope we succeeded in creating an app that does not require you to read the manual, but there will always be cases where you might not be aware of a short-cut or of some feature.

Want to report any errors or suggestions you might have for improvements? Please contact us at contact@archipad.com.

It is presumed that you are already familiar with the iPad, and know how to use the multi-touch screen as described in the iPad User Guide.

What does this document contain ?

This document is a reference manual. It describes each option from Archipad.

For a quick overview of Archipad, please read the Archipad Quickstart guide, available as a free download from our web site at www.archipad.com/doc/quickstart.pdf

About this document

When you read this document on your iPad or using a computer, remember you can double tap or double click the screens used to illustrate and view the screens at their best size.

You can download the latest available version of this document as a free download from our web site at www.archipad.com/doc/manual.pdf

This document describes Archipad version 5.0.7

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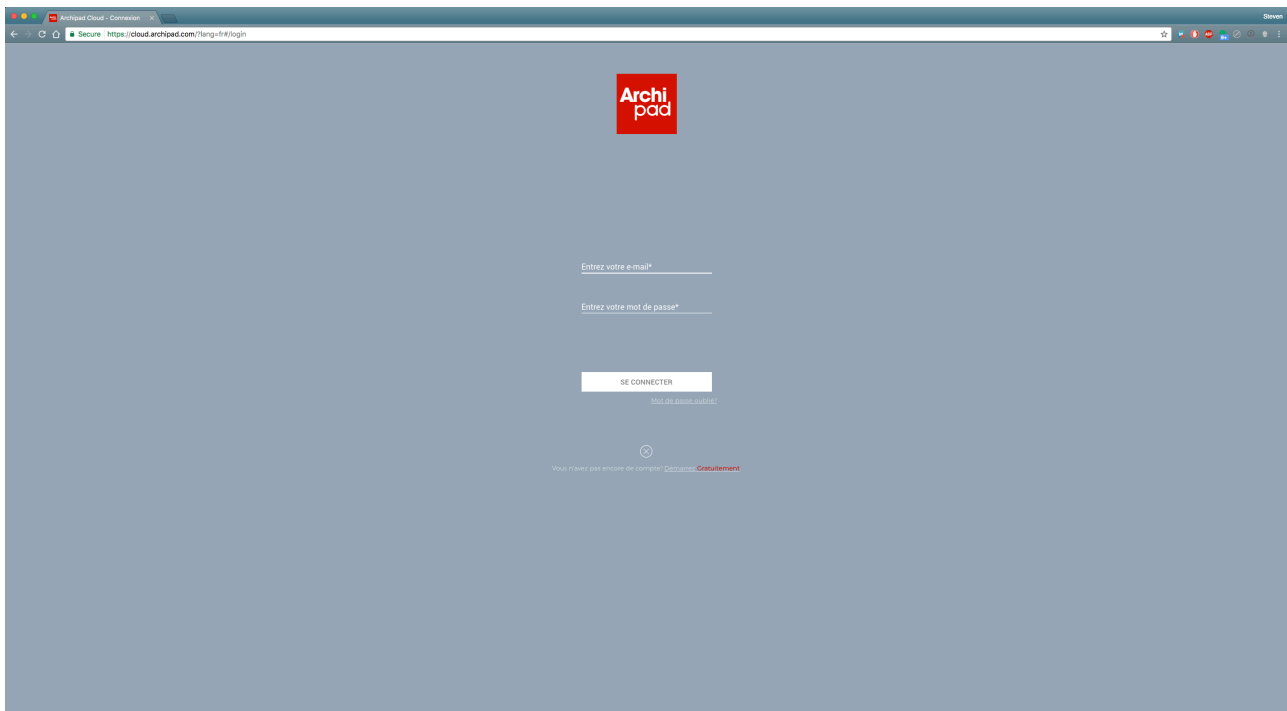
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1 - Archipad cloud

Archipad cloud will allows you to create and edit your projects from any computer (Windows or Mac), to synchronise for free all your projects from your iPad in order to keep a version of your projects online just in case you broke, lost or simply change your iPad.



Connect to Archipad cloud

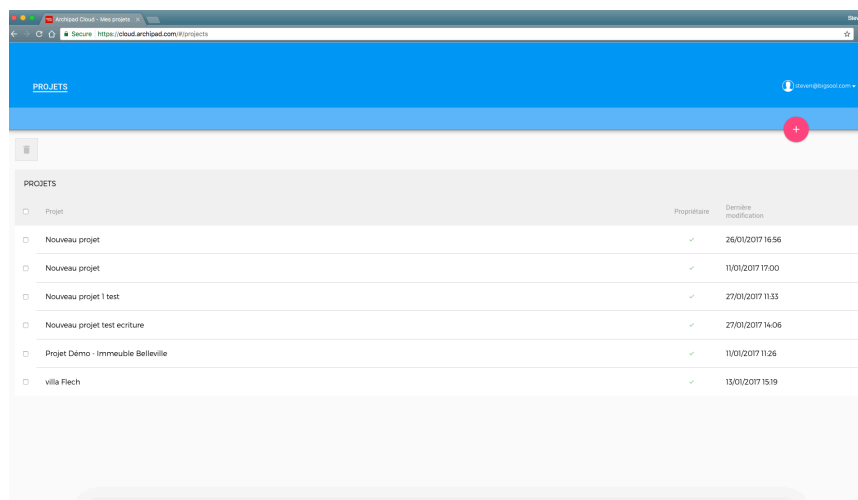
If you do not have an account yet, tap Create account.

If you forgot your password, click on [forgot password ?](#).

Once you are connected, your email address displays in the upper right. Tap your email address to access to your profil, your personal space or to disconnect. You can also activate the automatic renewal from this dropdown menu or from your profil in the billing section.

Project selector screen

The My Projects screen is your landing screen in Archipad, from where you will manage your projects.



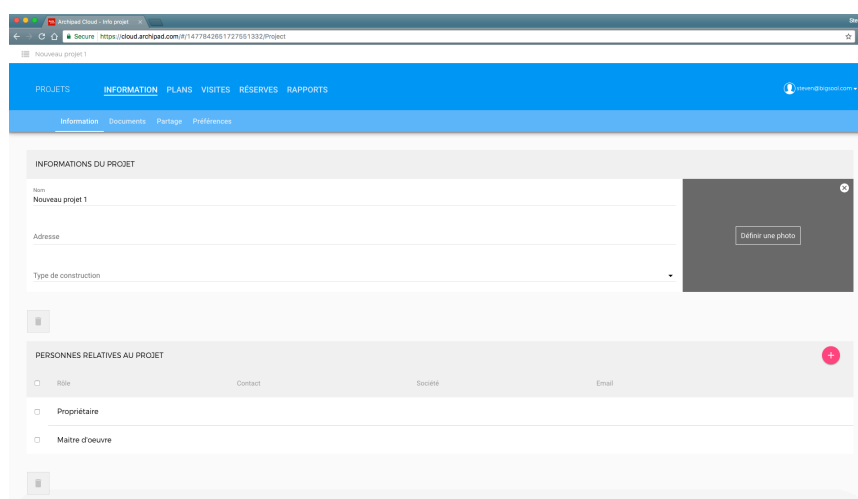
Project's list

Open any of the projects in the list with a tap on its line. Once you opened a project, you can change information about the project, including the name and photo.


Remember to regularly backup your iPad. Taking an iPad to a construction site exposes your iPad to many new risks. Be prepared, with regular backups you will not suffer too much loss, and when done regularly, backups do not take long.

New project

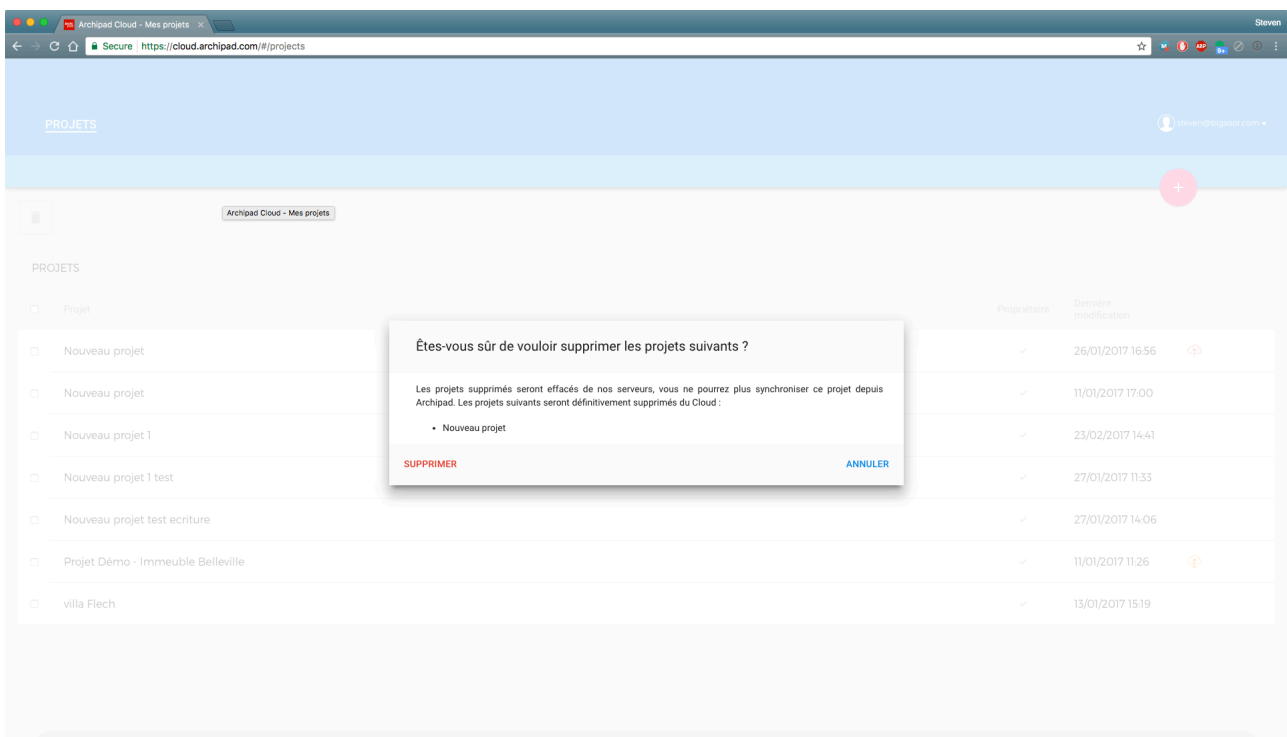
Click on the plus button on the upper-right to create a new empty project. A new line with "New project" will appear in the list and Archipad cloud will bring you to the informations page.



Delete a project

Use the  Delete button to remove unwanted projects. You must confirm this action before the project is actually deleted. This button will appear when your mouse comes on the project's line.

Deleting a project is permanent, so it's important to save your project on your computer first, using the [Export](#) button.



Be careful ! When you delete a project from Archipad cloud you can't get it back !

Create a template project (on iPad)

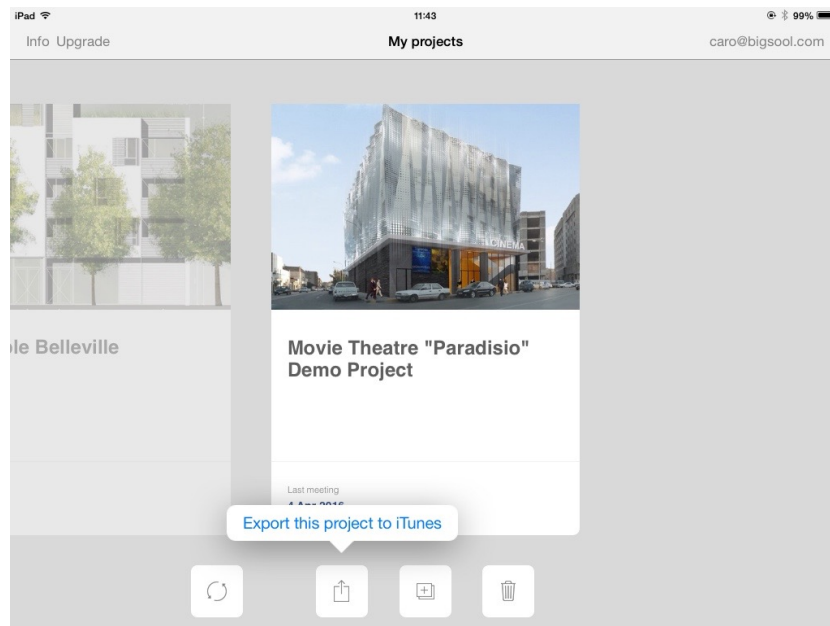
You can from your iPad create projects which serve as templates. For instance when you often work with the same work packages, you can create a template project which contains all the work packages and export it to iTunes.

For a new project, instead of using [New project](#), you import the template project from iTunes. Your project will contain all the pre-filled information, such as the work packages.

You can also pre-create categories and subcategories with remarks or empty remarks for each section. This way you will gain time by avoiding to have to rewrite them for every new project.

Export this project to iTunes

Use the  Export button to export your project to iTunes.



[Export this project to iTunes](#) allows you to save your project, to make copies, or to transfer your project on another iPad. However, this action do not allow you to consult your project on your computer.

When you export a project to iTunes, it is not automatically copied to iTunes, it only becomes available for sharing with iTunes.

Please follow the instructions in [See which projects are shared with iTunes](#) to copy your project from your iPad to your computer.



2 - Project info screen

The Project info screen is where you enter information about the owner, location, type of construction, and a photo or drawing of the project. The list on the left gives you a quick access to the other sections of a project.

Name

Enter the name of the project in this field. The name will show on the project cards, and be printed on each page of reports you generate.

Address

Enter the address of the project's physical location in this text area. The address will show on the first page of your reports.

Type of construction

Tap the [Type of construction](#) field to view the list of the pre-defined entries, or to type the type of construction if it is not listed yet.

Each type of construction you enter will automatically be added to the list, ready for you to use the next time.

Use the [Edit](#) button to remove any unwanted entries from the list.

Project contacts

The list of project contacts allows you to easily group all contacts in one location. Do not add contractors or subcontractors here, as they will be listed in the Work packages section.

When you tap [Edit](#) list button, you can add and remove contacts, and specify their role.

The screenshot shows the Archipad Cloud interface with a modal form titled "Personne relative au projet" (Person related to the project) open. The modal contains the following fields: "Rôle" (Role) with a dropdown menu, "Nom" (Name), "Société" (Company) with an "Abr" (Abbreviation) field, "Adresse" (Address), and "Email". A "FERMER" (Close) button is at the bottom right of the modal. In the background, the "PERSONNES RELATIVES AU PROJET" (Persons related to the project) section is visible, showing a list of roles: "Rôle", "Propriétaire", "Maitre d'œuvre", and "Contact". Below this, the "LOTS DE TRAVAUX" (Work packages) section is partially visible, showing a table with columns: "#", "Lot de travaux", "Contact", "Société", and "Email". A message at the bottom states: "Aucun lot de travaux n'a été ajouté à ce projet. Cliquez sur + pour ajouter un nouveau lot de travaux." (No work packages have been added to this project. Click on + to add a new work package.)

Tap the [Function](#) field to enter a function for this contact.

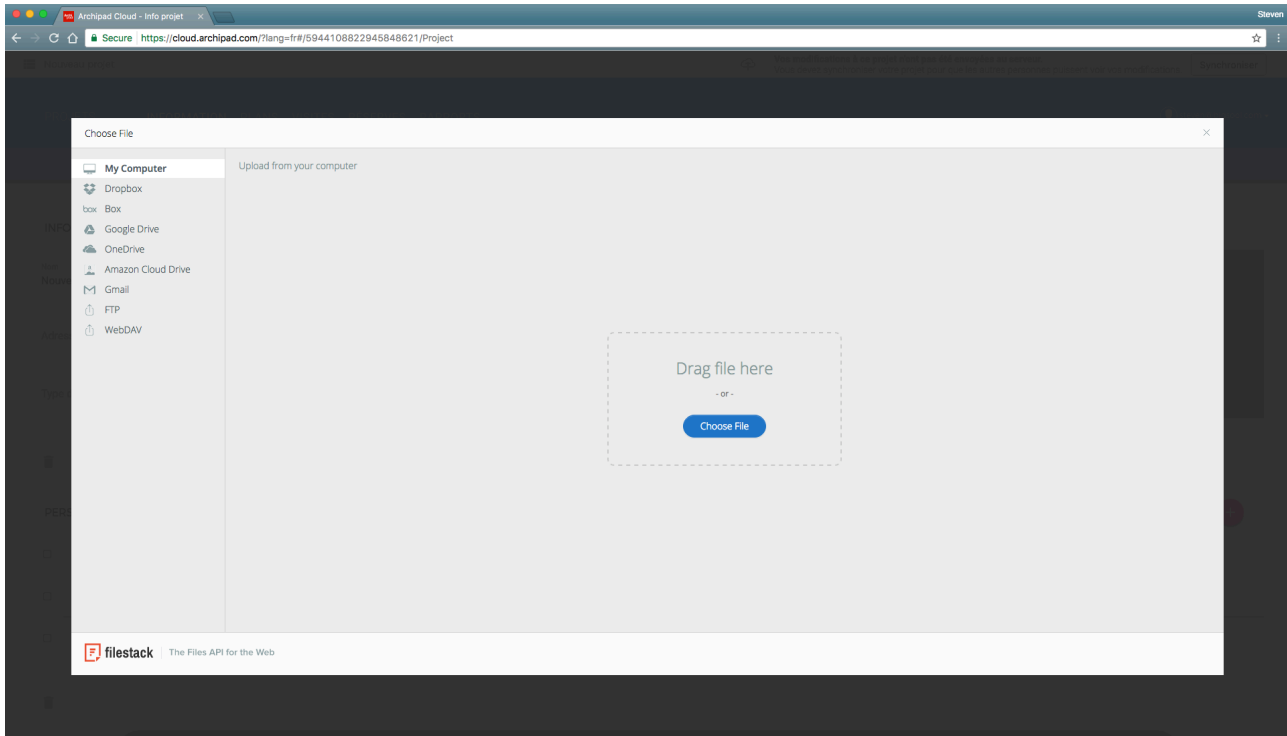
WORK PACKAGES

You can also add work packages to your project, you'll have to do the exact same operation than before click on the + button a pop-up will shew up and then you just have to fill the required fields.

The screenshot shows the Archipad Cloud interface with a modal form titled "Personne relative au projet" (Person related to the project) open. The modal contains the following fields: "Rôle" (Role) with a dropdown menu, "Nom" (Name), "Société" (Company) with an "Abr" (Abbreviation) field, "Adresse" (Address), and "Email". A "FERMER" (Close) button is at the bottom right of the modal. In the background, the "PERSONNES RELATIVES AU PROJET" (Persons related to the project) section is visible, showing a list of roles: "Rôle", "Maitre d'ouvrage", "Maitre d'œuvre", "Economiste", "BET Structure", "BET Structure", "BET Fluides", "Contrôleur technique", "Coordonnateur SPS", and "Acquéreur". Below this, the "LOTS DE TRAVAUX" (Work packages) section is partially visible, showing a table with columns: "#", "Lot de travaux", "Contact", "Société", and "Email". A message at the bottom states: "Aucun lot de travaux n'a été ajouté à ce projet. Cliquez sur + pour ajouter un nouveau lot de travaux." (No work packages have been added to this project. Click on + to add a new work package.)

You can also add a description or documents to your work package attached to them specifically.

Files linked to project

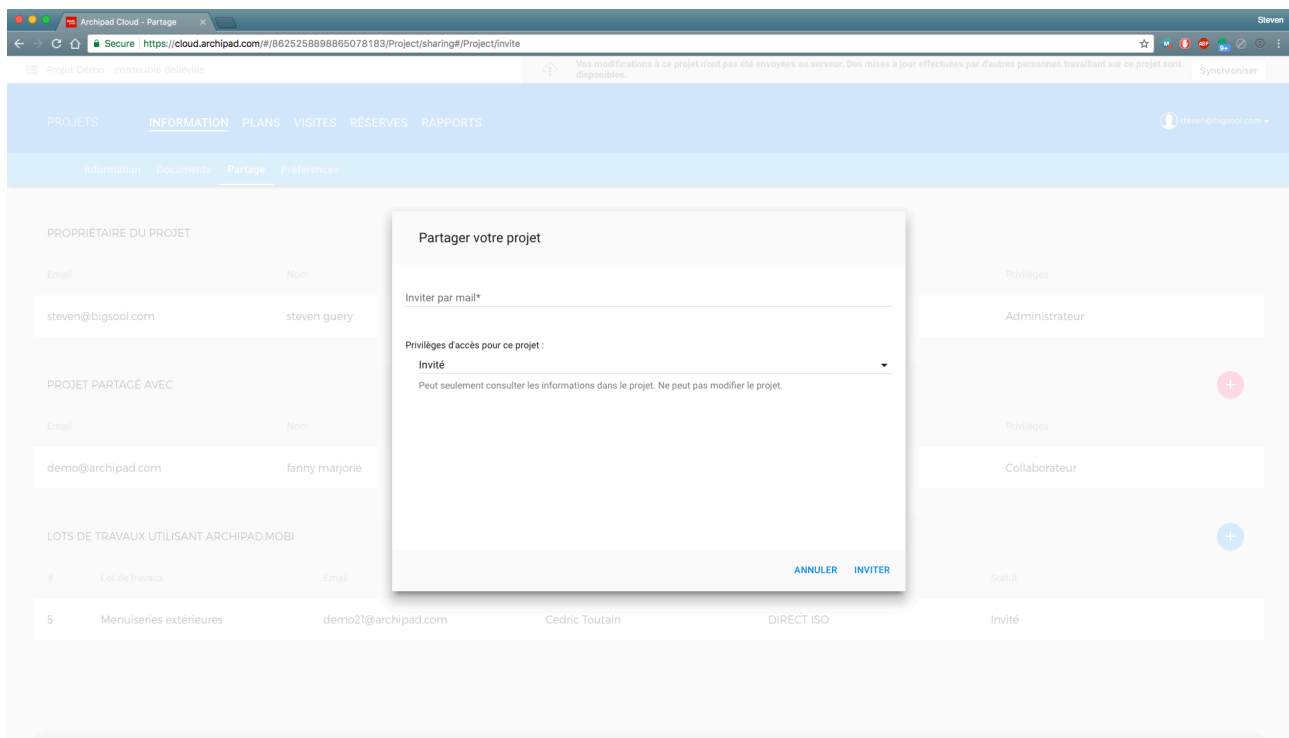


From Archipad cloud you can add all documents you will need on your projects to always have all the documents you need with you on the go, contracts, invoices, product samples, ...

You can see these documents on your iPad by importing them using the **Import** button to the right of the document. Tap the ➤ button to open the document and view it's content once it is imported.

Project's Photo

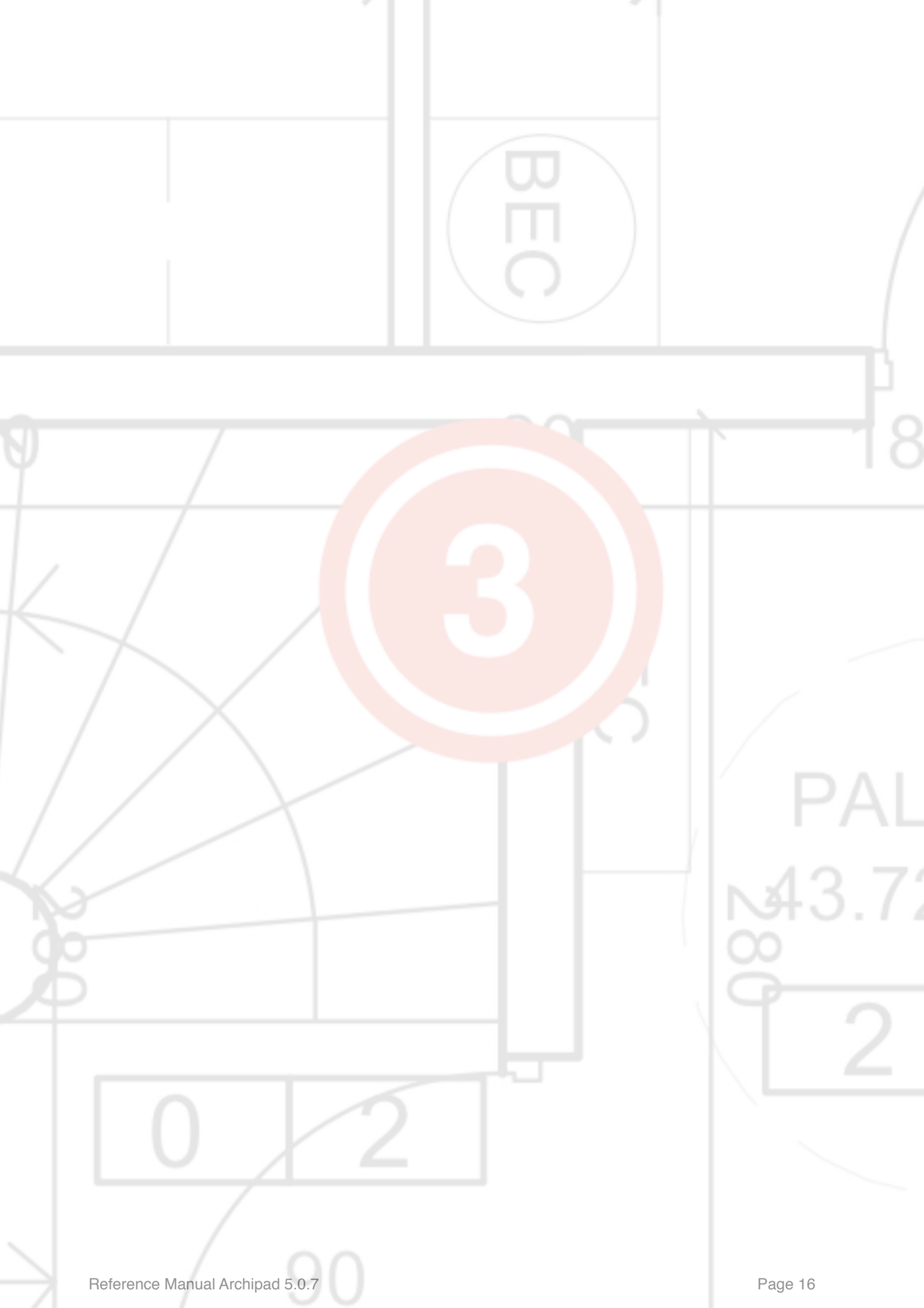
Click on the **Photo** field to download a photo for your project. You can drag and drop your file from your computer or download it from different platforms like Dropbox, One Drive, Gmail...



Share your project


From Archipad cloud invite all your coworker to work on your project. You can even choose what will be their rights on your project between :

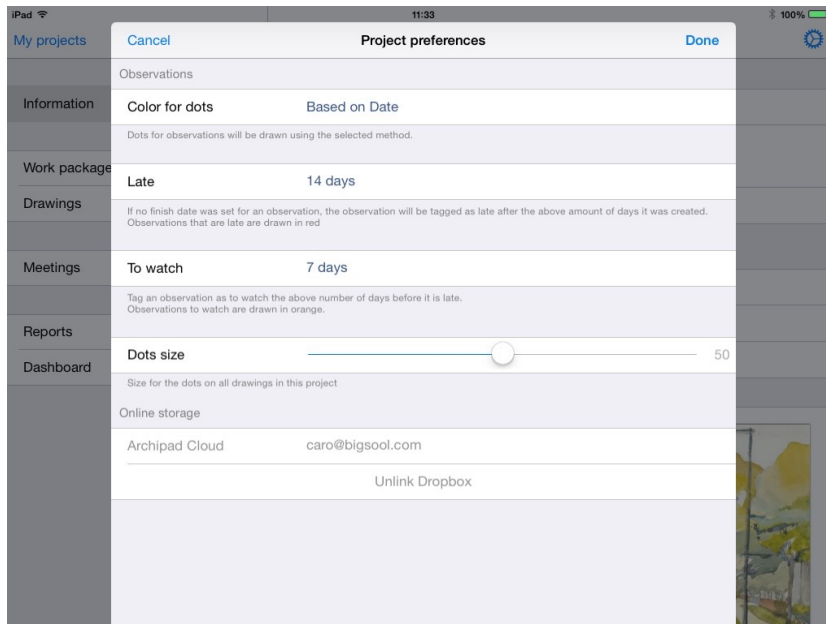
- Admin : Has complete control over this project. Admins can do everything you can do on this project.
- Collaborator : Can to create and solve issues, generate and share reports. Cannot modify project data such as contacts or plans.
- Guest : Can only browse and see all the data in this project. Cannot modify anything.



3 - Project preferences

Projects preferences are accessible from your iPad right after tapping on the project's card

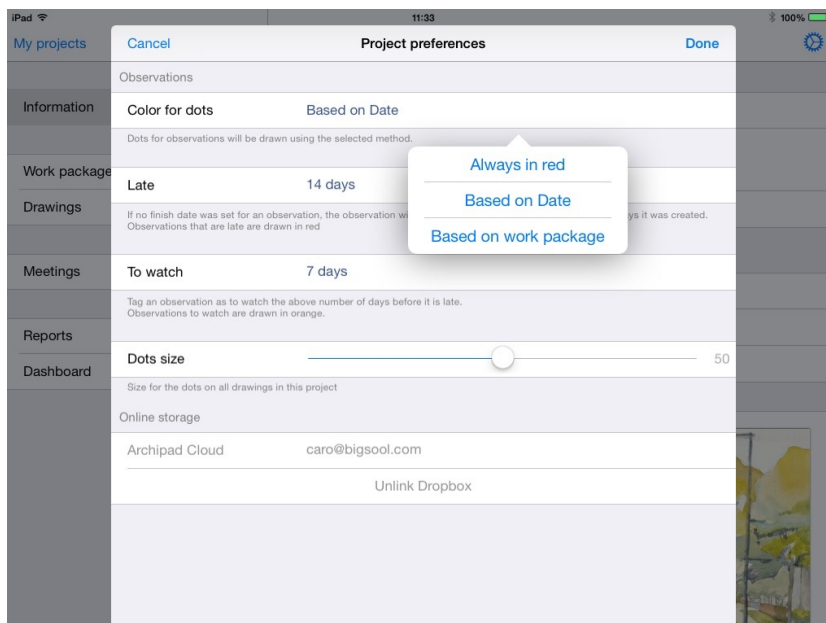
Tap the  Preferences button to display the project preferences, such as the choice of the observations dots color or storage services...



Color for dots

You can determine the color of the dots for the observations according to three criteria :

[Always in red](#), [Based on date](#) or [Based on work package](#).



Select [Always in red](#) if you want observation dots to always be in red.

Select [Based on date](#) if you want the color of your dots changes by the deadline.

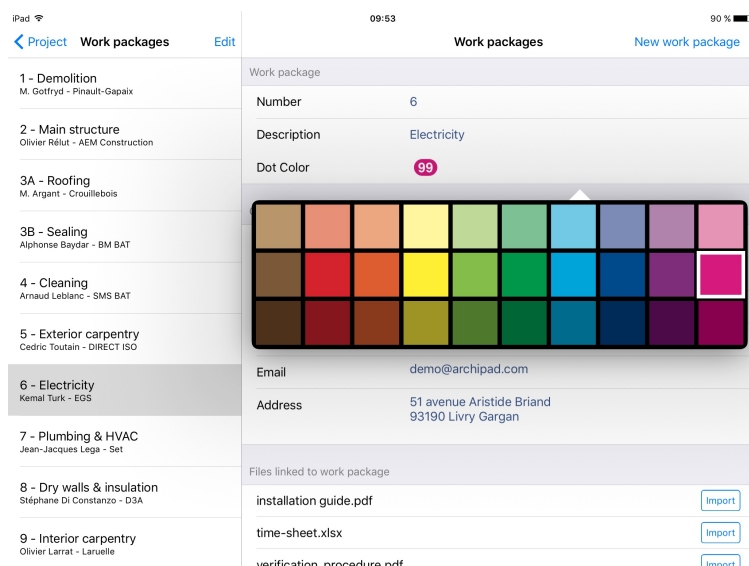
The dot is blue on the date of the meeting in which the observation was created and when it is not near the due date.

However, two cases are possible depending on the finish date specified:

- If a finish date is specified, the dot turns orange 7 days before the finish date and the observation is considered as To watch. The dot turns red when the finish date is past and the observation is considered as Late.
- If a finish date is not specified, the dot turns orange 7 days after the date of the meeting in which the observation was created and turns red 14 days after the creation of the observation.

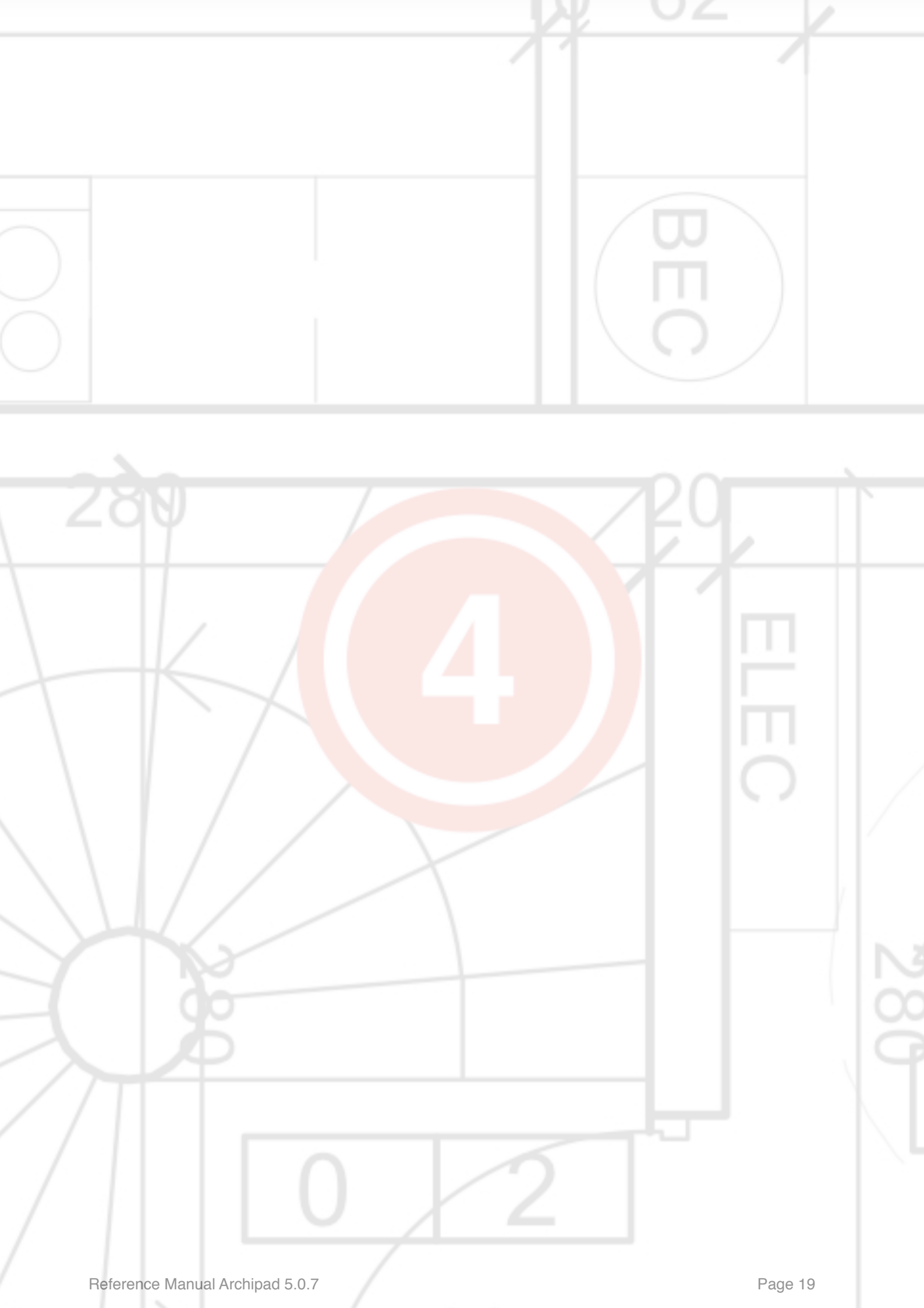
Select [Based on work package](#) if you want to color the dots by work package. You can specify the color of the dots for each work package on the Work packages page. If you specify [Based on work package](#) before you create your work packages, Archipad will automatically pick the next available color to avoid using the same color twice.

Tap the dot and choose your color.



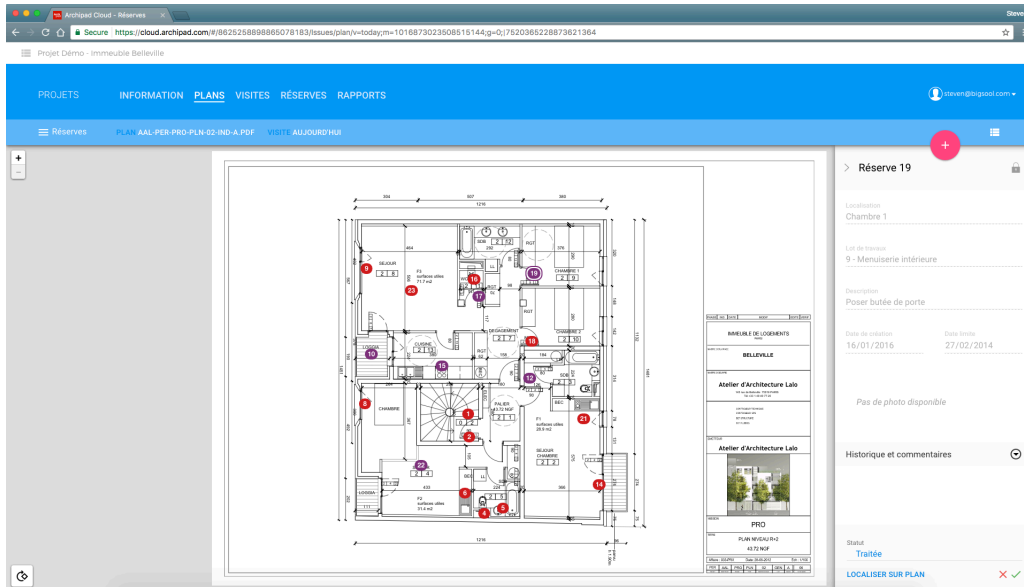
Dots size

You can edit the size of dots by adjusting the cursor to the desired size.

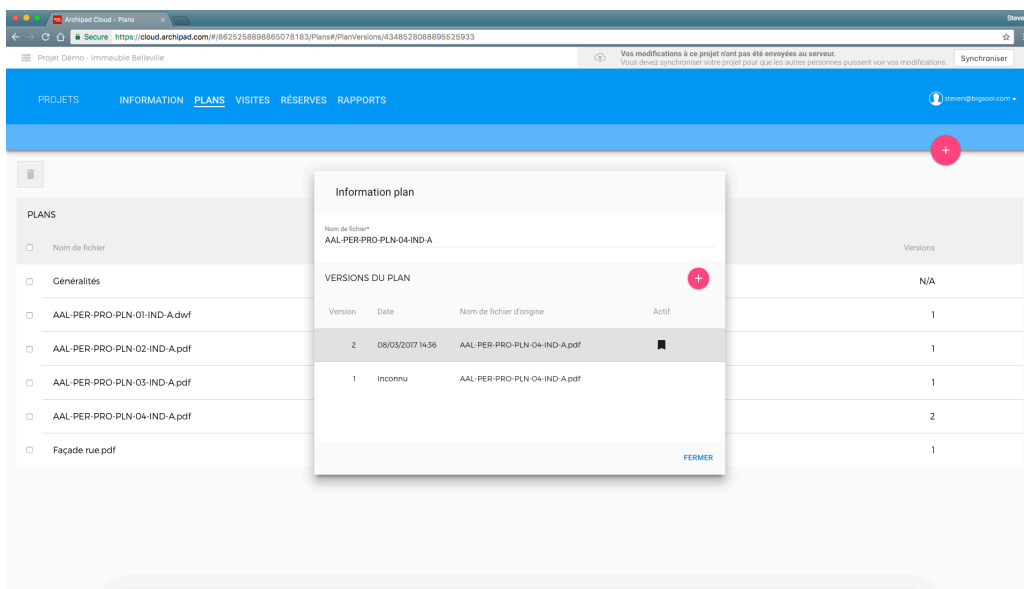


4 - Drawings

Drawings, maps, blue-prints, photos, roughs, sketches, PDF, DWF and DWFX documents, can be used by Archipad, and are collectively called a drawing. They are in 2D formats only.



We strongly recommend that you import and update your drawings using Archipad cloud.

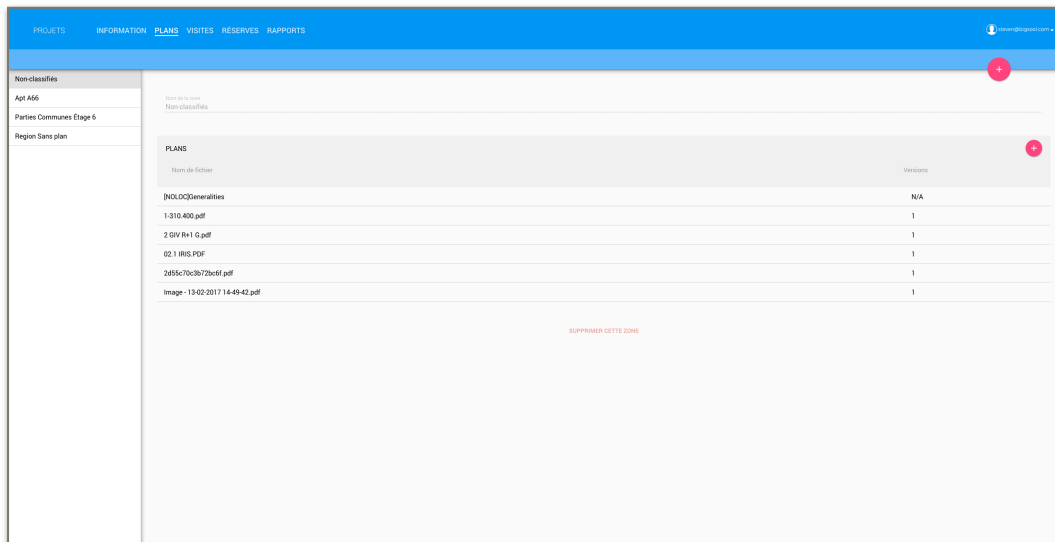


Note that you can also add drawings from our website, directly from your computer or any serveur you are connected to, Dropbox, Google Drive, Box, OneDrive, etc..

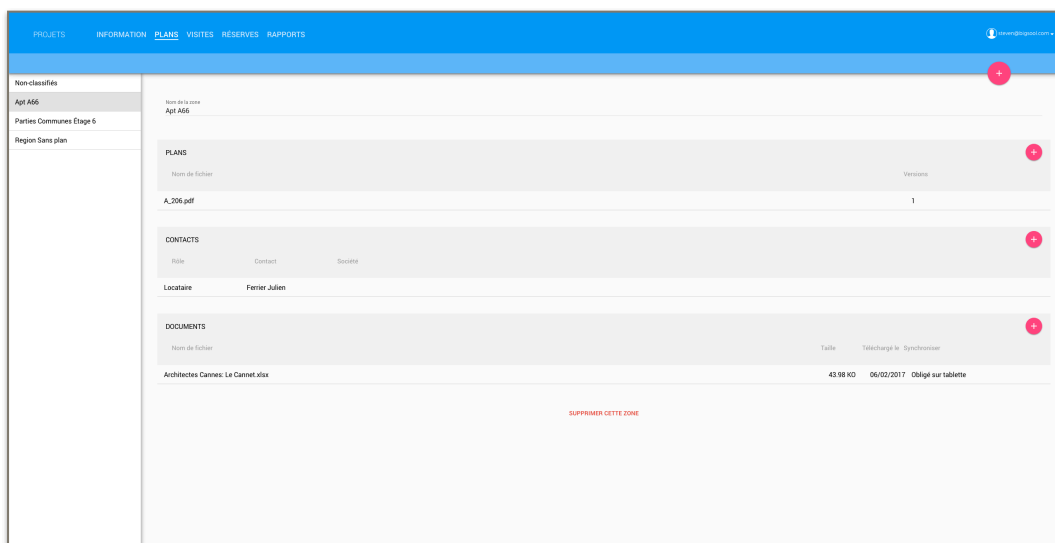
Importing drawings using Archipad cloud also adds the benefit of version management for your drawings, allowing you to activate a new version of a drawing at any time.

How to manage your drawings by region ? (premium feature)

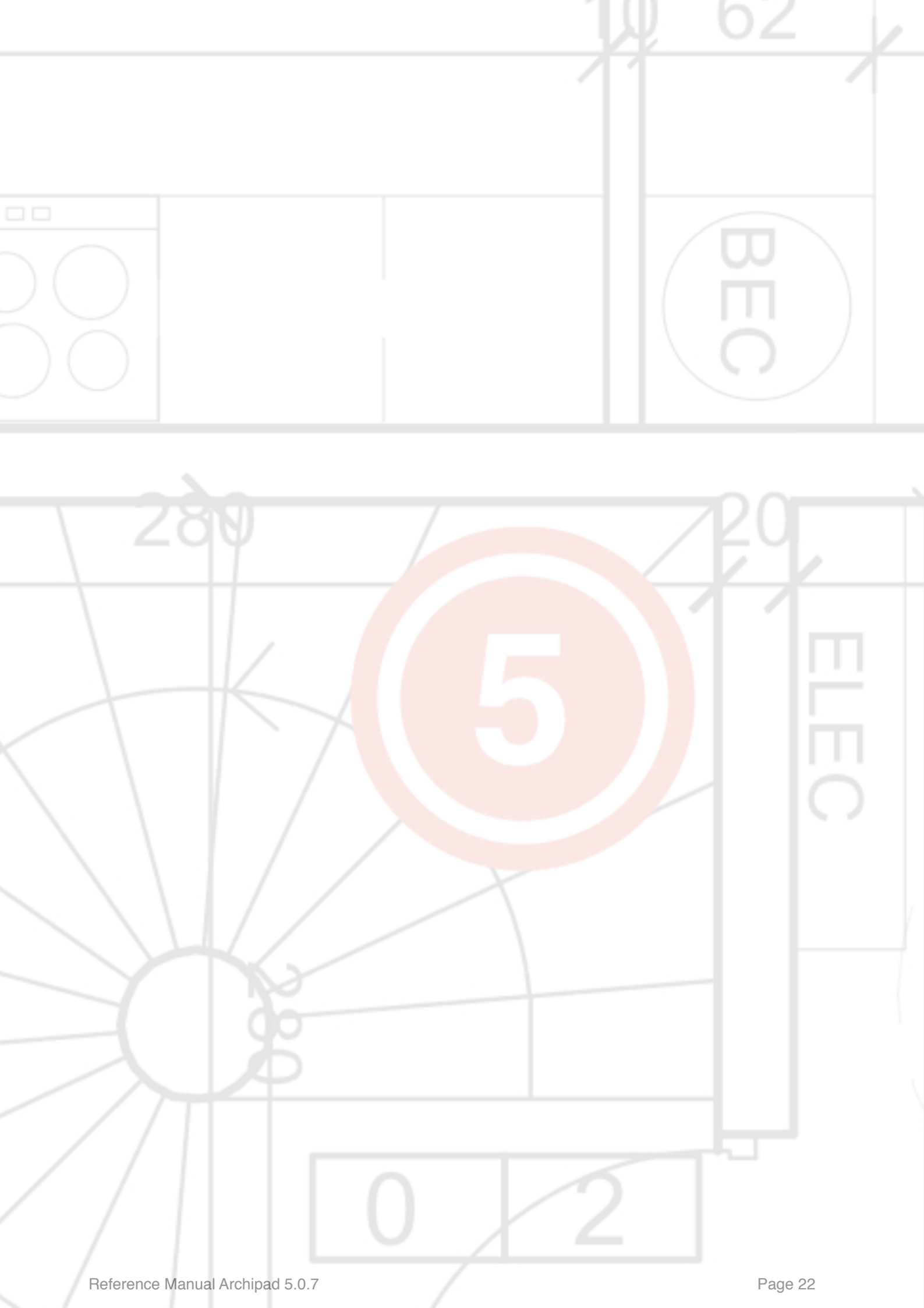
A new feature is now in Archipad ! You can now create different region and manage your drawings, contacts and documents inside each of them. there is two kind of region in Archipad :



1. Unclassified region : Here you will see all the drawings that you want to access form anywhere.



2. Named Region : Here we are talking about a region created by you. All the documents, contacts and drawings that you uploaded in this region will be only accessible in it.



ELEC

BEC

5 - Meetings

Before you start your walk through visit on the construction site, you must create a meeting, even when you are all alone creating the punch list.

The screenshot shows the Archipad iPad interface. At the top, the status bar displays 'iPad', '14:09', and '76%' battery. Below the status bar, there is a navigation bar with 'Project', 'Meetings', and 'Edit' buttons. The 'Meetings' button is selected. To the right of the navigation bar, there is a 'Site meetings' header and a 'New meeting' button. The main content area is divided into two columns. The left column lists several meetings: '3 Mar 2015 Carpentry', '15 Feb 2015 Weekly Meeting 12', '25 Jan 2015 Weekly Meeting 11', '13 Dec 2014 Holists', and '7 Jul 2014 Carpentry'. The right column shows the details for the selected meeting, '3 Mar 2015 Carpentry'. The details include 'Meeting date' (3 Mar 2015), 'Meeting title' (Carpentry), 'Notes' (Next meeting 8/14. The observations apply to all apartments. Work package 16 - kitchen equipment.....), 'Present at current meeting' (with a right arrow), 'Signatures' (with a right arrow), 'Convened for next meeting' (with a right arrow), 'Observations' (with a right arrow), and 'Meeting minutes' (with a right arrow).

Meeting date

When you create a new meeting, the meeting date is automatically set to the current date. However, in some cases you might want to change this date, typically when you are preparing the site meeting ahead of time in the office.

Meeting title

Enter a description for the meeting in this field. The meeting title will be displayed in the report.

Notes

Add notes to be printed on the report in this field. The notes will be added at the end of the report, depending on the settings in the report generation dialog.

When you create a new meeting, the last meeting notes are automatically reintegrated.

Present at current meeting

Tap the [Present at current meeting](#) button to manage the information about those that are present, absent, excused and about the penalties.

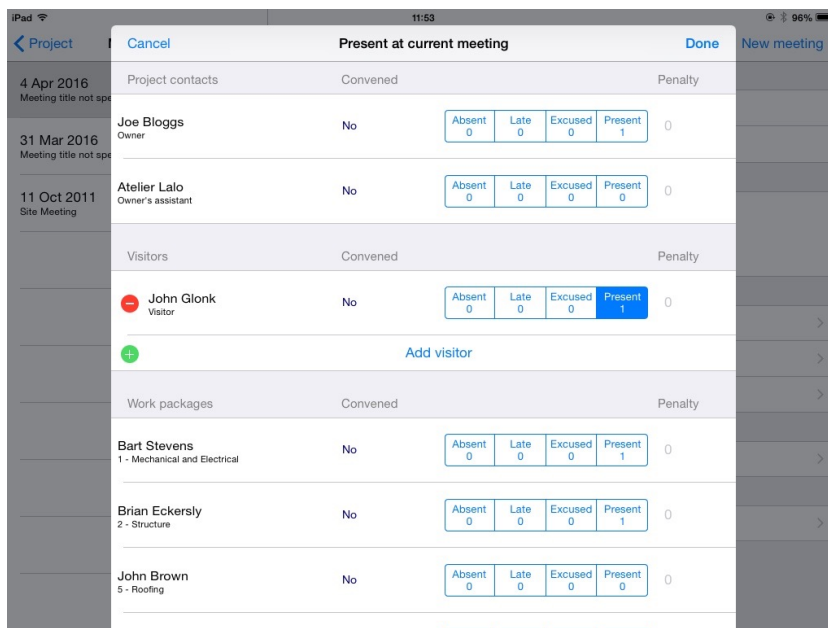
Project contacts	Convened	Absent	Late	Excused	Present	Penalty
Jansen Architect Owner	Convened	0	0	1	1	0
Jonas Ferry Owner's assistant, 9 - Electricity	No	0	0	1	1	0
Visitors						
Add visitor						
Work packages						
Cagrat 5 - Covers	Convened	0	0	0	2	0
Goutte 7 - Waterproofness	No	1	0	0	0	0
John Glonk 10 - Electricity	Convened	1	0	0	1	0
John Padarchi 1 - Electricity	No	0	0	2	0	0

The list is composed of three groups; the project contacts, the visitors, and the general contractors and subcontractors in charge of the work packages.

The project contacts group contains all the contacts you entered in the project info screen.

In the visitors group, you can add people that are present at the current meeting, but do not have a particular role in the project, such as the fire inspection or any other inspector. Adding these contacts here will assure you that they will be easily integrated in the list of recipients of the report you will send out.

Tap the [Add visitor](#) button to select or create new entries in your Contacts address book.

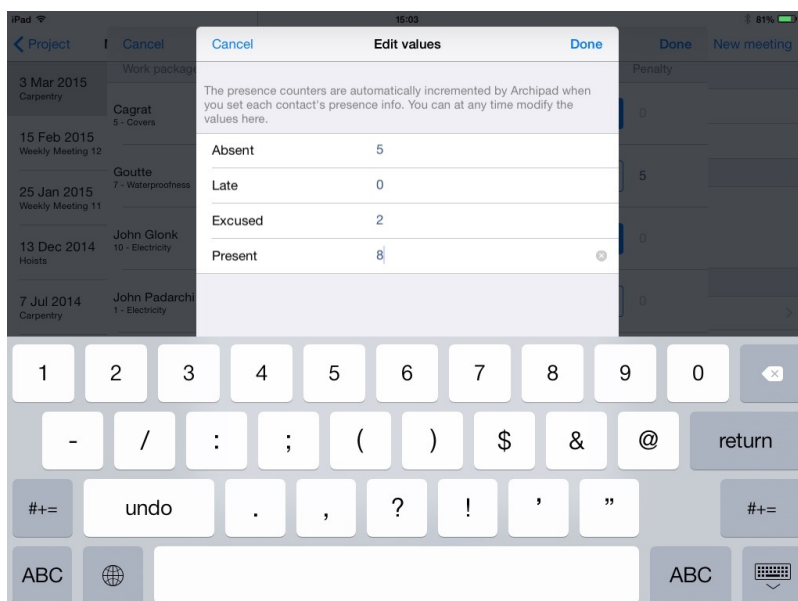


For each person in any of the groups, you can specify whether they are absent, late, excused or present. If you specify none of the values, it will be interpreted that the person was not present, but that their presence was not requested either.

You can apply a penalty to the project contacts and the work packages if they are absent or repeatedly late. The penalties are kept from one meeting to the next. You can modify the appropriate value in case of multiple penalties.

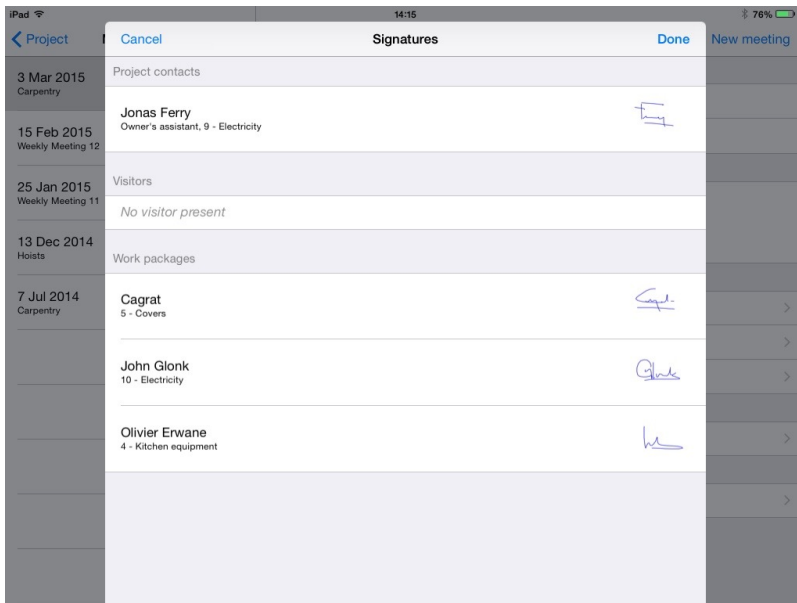
By using the counter, you can record the number of absences, presences and delays of the projects contacts.

To modify these values tap and hold down until the following dialog opens, where you can change and edit each of the values:



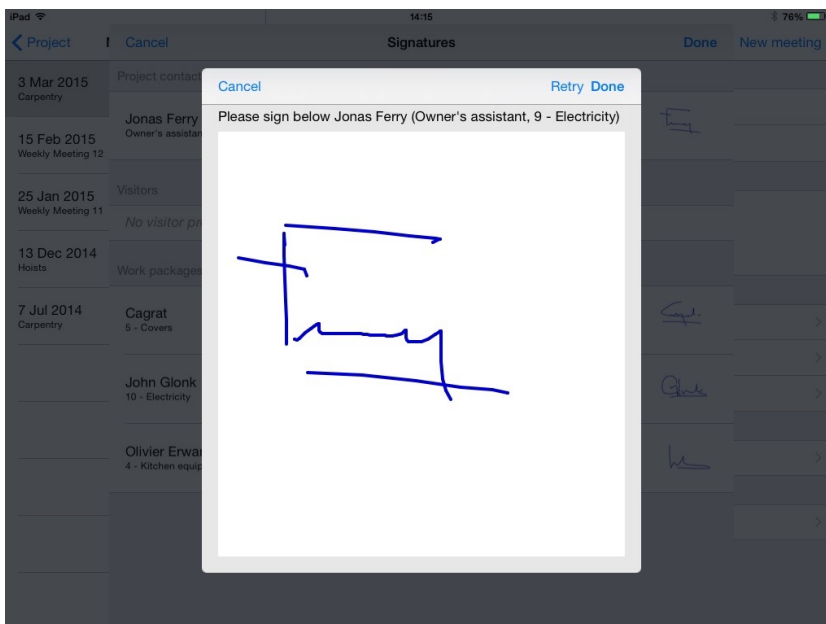
Signatures

Tap Signatures to collect the signatures of all those you marked as present to this meeting.



You can not add or remove anyone from any of the groups displayed, as the signatures dialog shows all those that you marked as present in the Present at current meeting dialog.

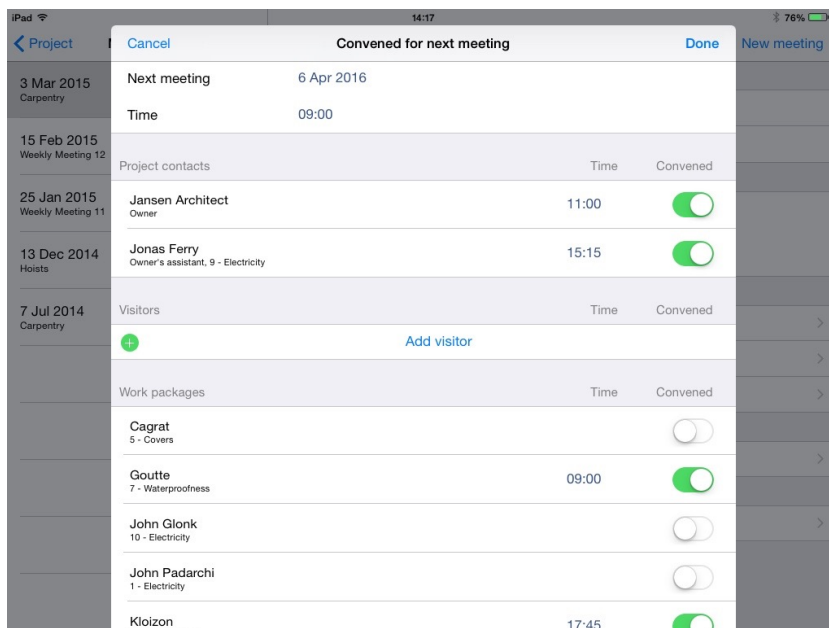
Tap the name of any contact that did not sign, in our example Jonas Ferry, and a dialog will show where you can sign:



Tap **Retry** to clear the signature and start over. Tap **Done** to accept the current signature.

Convened for next meeting

Tap **Convened for next meeting** to convene people to the next meeting.



The time defined at the top is the time the meeting begins and will be the default time at which each person is convened. You can assign a specific time to every convened person.

The list is composed of three groups: the project contacts, the visitors, and the contractors and sub-contractors in charge of the work packages.

The project contacts group contains all the contacts you entered in the project info screen.

In the visitors group, you can add people that are present at the current meeting, but do not have a particular role in the project, such as the fire inspection or any other inspector.

Adding these contacts here will assure you that they will be easily integrated in the list of recipients of the report you will send out. Tap [Add visitor](#) to select or create new entries in your Contacts address book.

For each person in any of the groups you can specify whether they are convened or not to the next meeting, as well as specify at which time they are convened.

Observations

Tap the [Observations](#) button to show the observations screen, where you will add and close observations.

More details can be found at Chapter 7 - Observations.


Meeting minutes

Tap the [Meeting minutes](#) button to view and add meeting minutes.

More details can be found at Chapter 8 - Meetings.

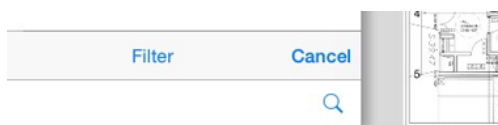
Filtering meetings


In order to view only certain meetings, you can use filters.

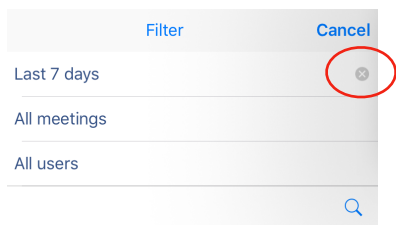
To activate a filter, tap the  Magnifying glass button lower left to show the possible filters to apply to the observations.

Tap the magnifying glass again to shrink the filter window.

When a filter is active, the bottom of the meetings list on the left shows a [Filter](#) and a [Cancel](#) button. Tap [Filter](#) to reduce the filter window. Tap [Cancel](#) to deactivate all the filters.



Tap the  remove icon to reset a specific filter.



Filter by date

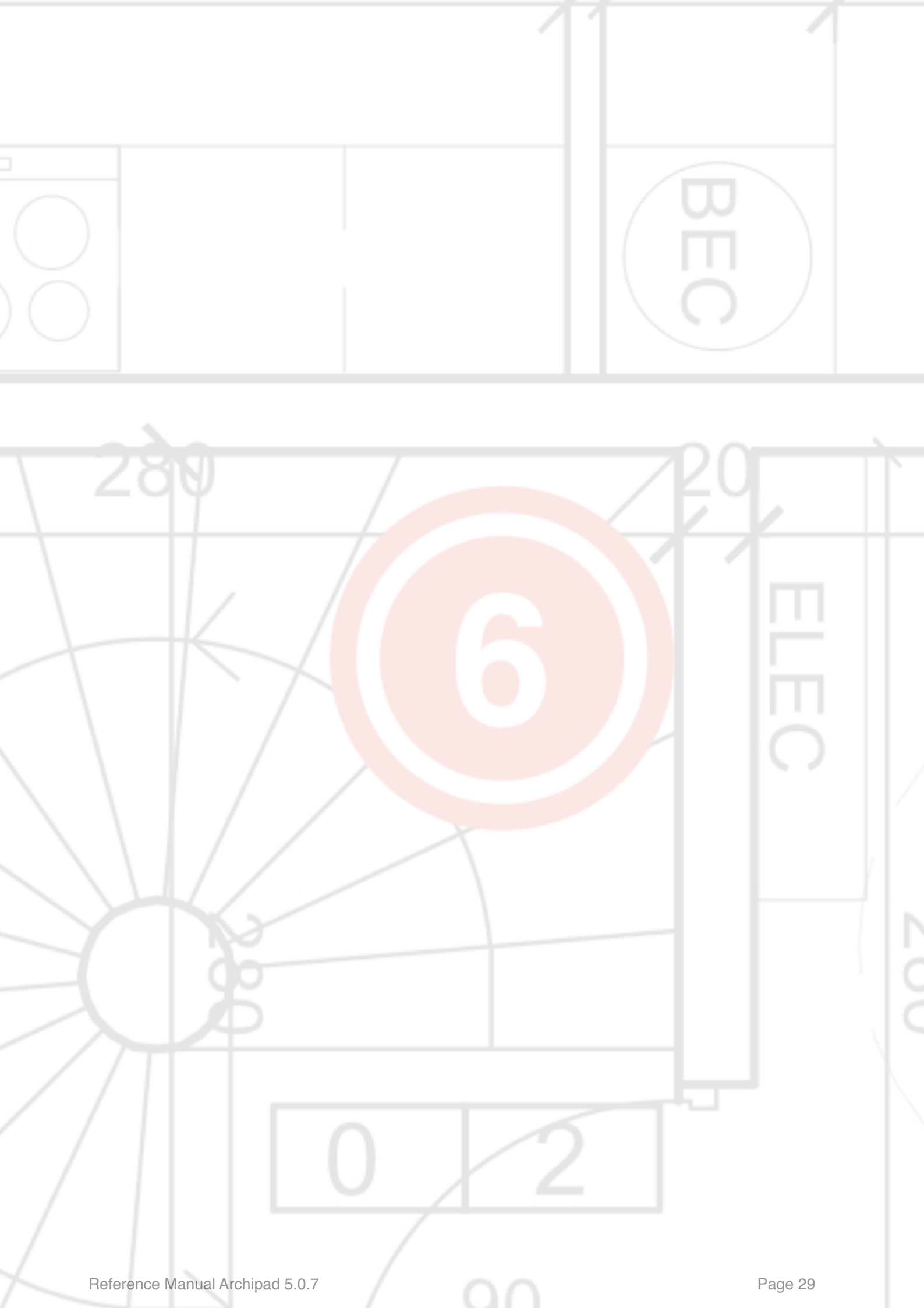
By default, all meetings are shown. However, if you tap [Any date](#), you can apply a filter and choose to reveal only the meetings [Upcoming](#), those of [Today](#), those of [Last 7 days](#), or those of [Last 30 days](#).

Filter by visit type

By default, all visits types are shown. However, if you tap [All meetings](#), you can apply a filter and choose to reveal only certain types of meetings as a site visit.

Filter by users

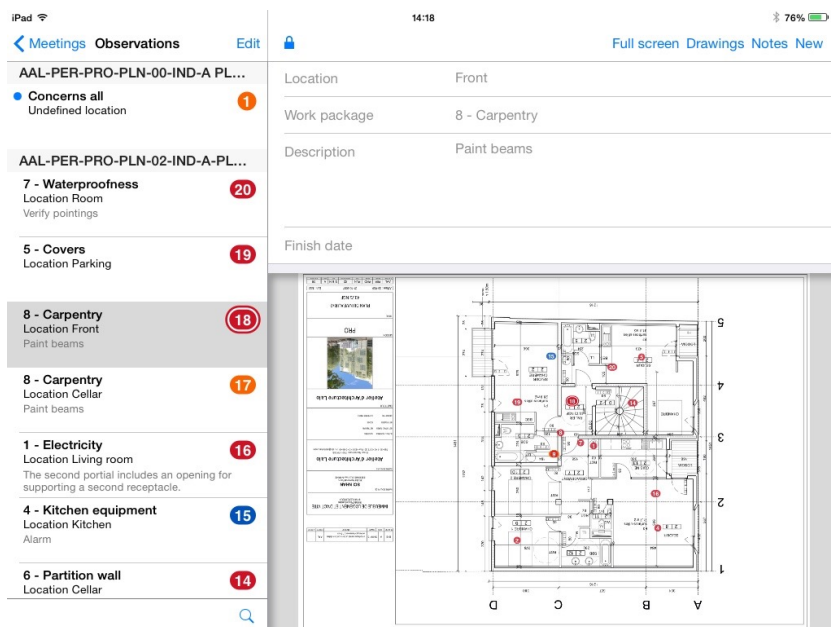
By default, all users are shown. However, if you tap [All users](#), you can apply a filter and choose to reveal only certain users.



6 - Observations

The Observations screen is where you will spend most of your time in Archipad. As you walk through the construction site, you will add here any observation, by pointing on the drawing where you found the issue. Add a description and location, and the date by which issue should be solved, optionally you can add a photo and a sketch to each observation to clarify and for tracking purposes.

Note that you can also edit and create observations from our website.



Add an observation


Tap the drawing or photo at the location where you want to position the observation, this will automatically create a new observation.

You can also use [New](#) to create a new observation, which will be placed in the center of the displayed drawing area.

The description area will display the newly added observation with the values from the last location and last work package entered on this drawing.

Add a photo

Take a photo

Tap the  Camera button to add a photo to an observation.

You can only add one photo to an observation. You can add a sketch on the photo.

Choose a photo

Tap the  Camera button to import a photo from your Photos library.


You can only add one photo to an observation. You can add a sketch on the photo.

Add a sketch

Tap the  Camera button to add a sketch to an observation.

You can only add one sketch to an observation.



Add a sketch on a drawing

Tap the  Camera button to add a sketch on a drawing to an observation.


You can only add one sketch on a drawing to an observation.

Edit the list of observations

Use the [Edit](#) button to delete or close any observation from the list.

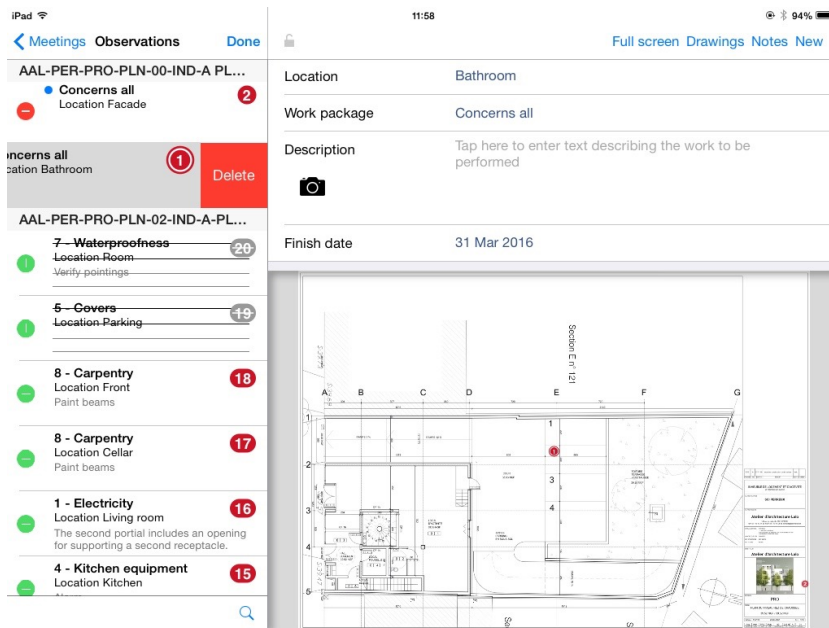
Each of the observations, depending on whether it was added in a previous visit or during the current visit, will show either a delete  icon or a close  icon.

Tap a delete  icon to remove the corresponding observation. This action must be confirmed with the  Delete button.

Tap the close  icon to mark the observation as closed. The observation in the list will be shown strike-thru to indicate the observation was closed. Tap again to undo.

Observations added in the current meeting are preceded by a blue dot, similar to new mail.

Delete an observation

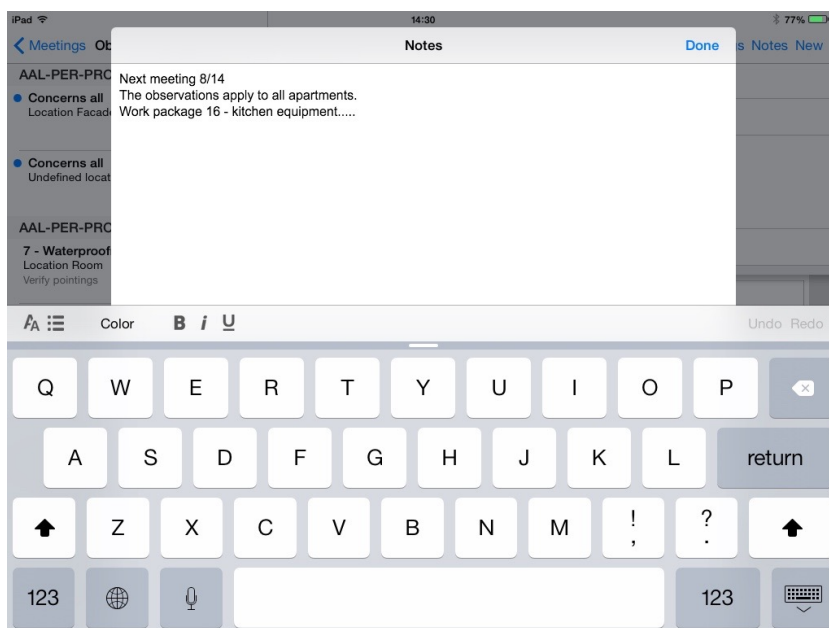


You can delete an observation directly from the list by swiping left over the observation title, then tapping the **Delete** button.

Only observations added during the current meeting can be deleted. Observations from a previous meeting are not deleted but closed.

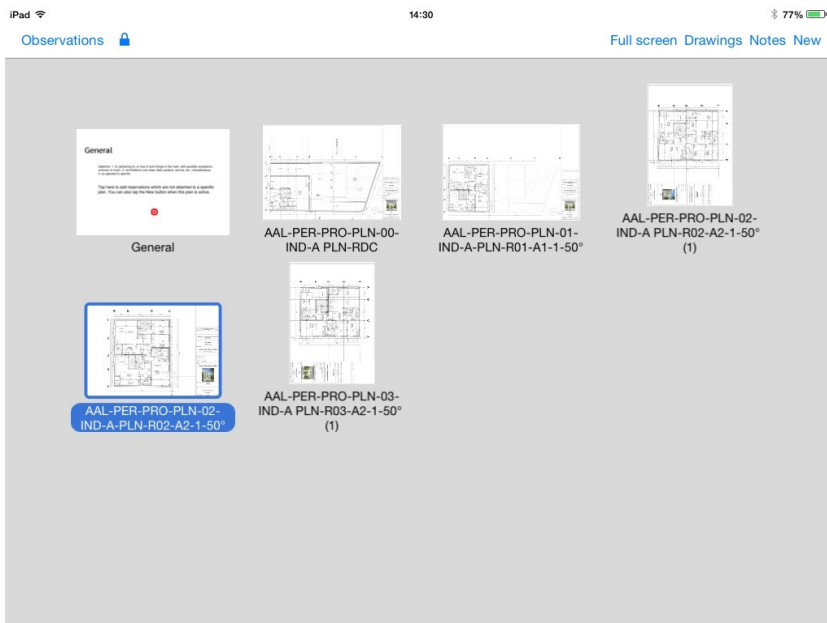
Notes

Tap **Notes** to display the notes to be included in your report. The same notes will display if you use this button of the **Notes** button from the Meetings screen.



Drawings

Tap [Drawings](#) upper right to display the thumbnails of all your drawings. When you zoom the drawing to be smaller than the drawing area, you will see the thumbnails for all the drawings in your project.



When there are many drawings in your project, you can scroll the list of drawing thumbnails horizontally.

Fullscreen

Tap [Fullscreen](#) when you want to see your drawing as large as possible.

The list on the left and the observation description area on the top will both disappear. Note that when you add a new observation to the drawing, both the list and the description area will return.



Close an observation

Swipe the observation in the list on the left. The observation in the list will be shown strike-thru and dimmed to indicate the observation was closed. Swipe again to undo.

Only observations added during previous meetings can be closed. Observations from the current meeting are not closed but are deleted.

An observation closed in a meeting will not be shown in the following meeting. Open the meeting which created the observation to edit the observation.

You can edit an observation from a previous meeting when you open the lock.

Accept or reject an observation marked as Solved

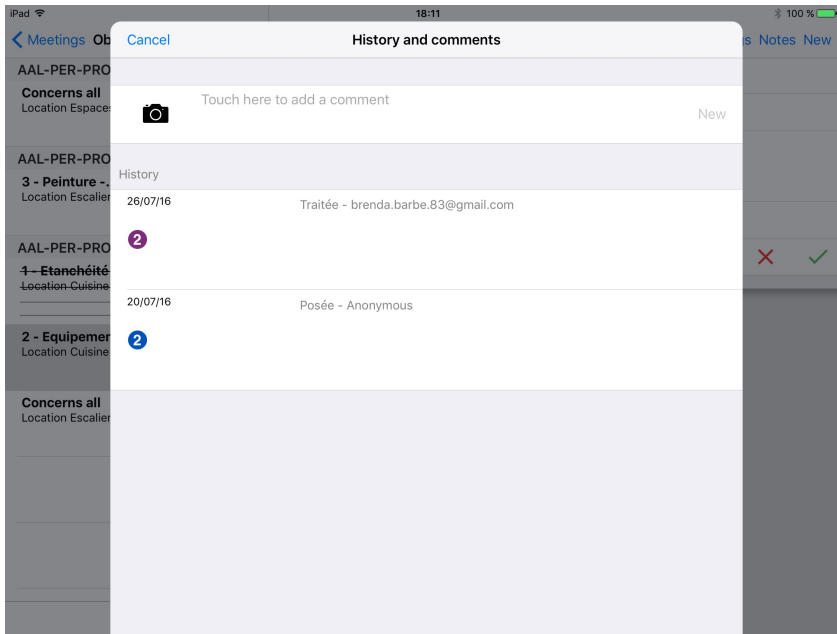
When a contractor marks an observation from archipad.mobi as solved, you can accept or refuse their work.

Status

Solved




Each status change for an observation can be accompanied with a comment and a photo.



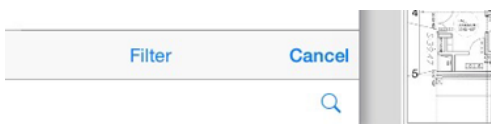
Filtering observations


In order to limit the number of observations drawn on a plan, or to only view certain observations, you can use filters. Filters, depending on the type of filter, will only show certain observations, and hide from view all the others.

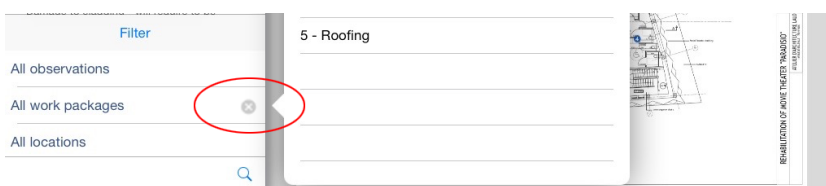
To activate a filter, tap the  Magnifying glass button lower left to show the possible filters to apply to the observations.

Tap the magnifying glass again to shrink the filter window.

When a filter is active, the bottom of the observations list on the left shows a [Filter](#) and a [Cancel](#) button. Tap [Filter](#) to reduce the filter window. Tap [Cancel](#) to deactivate all the filters.



Tap the  remove icon to reset a specific filter.



Filter by date

By default, all observations are shown. However, if you tap [All observations](#), you can apply a filter and choose to reveal only the [Observations from this meeting only](#), the [Observations to watch](#), or the [Observations past due date](#).

To reset this filter, choose [All observations](#) from the popup menu.

Filter by work packages

By default, all the work packages are shown. Tap [All work packages](#) to apply a filter to reveal only observations assigned to only one general contractor or subcontractor.

Filter by drawings

By default, all the drawings are shown. Tap [All plans](#) to apply a filter to reveal only observations assigned to one specific drawing.

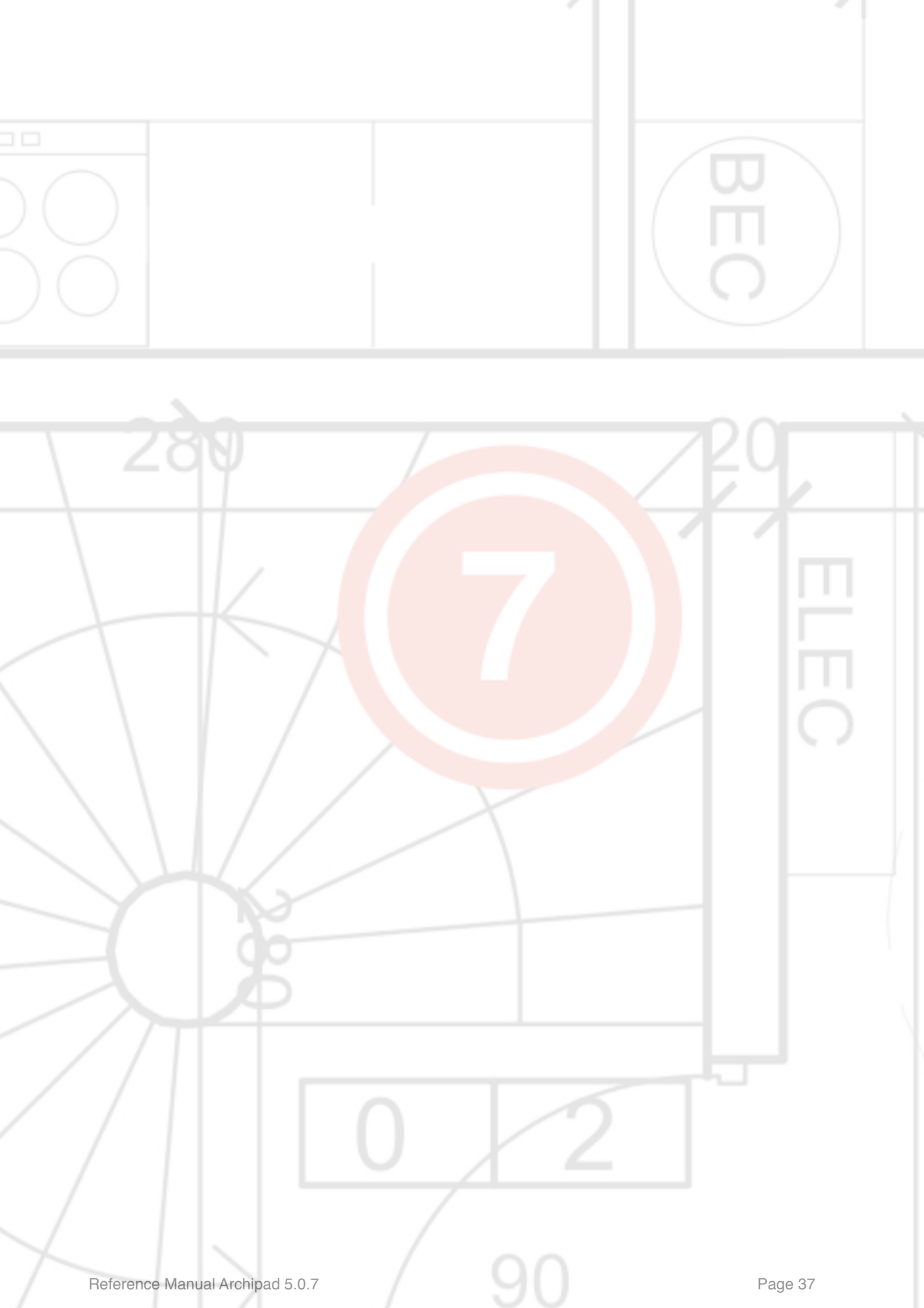
Notice that the filter selection is different from the parameters, it is possible to search among the plans of your project, often many, using one or more keywords.

Filter by locations

By default, all the locations are shown. Tap [All locations](#) to apply a filter to reveal only observations assigned to one specific location, such as Bedroom, Bathroom, ...

Filter by users

By default, all users are shown. However, if you tap [All users](#), you can apply a filter and choose to reveal only certain users.



7 - Remarks

During a construction site meeting, you will add in this screen any remarks, which you can classify by category and subcategory. You can optionally add a photo or sketch to remarks to illustrate them.

The screenshot shows the iPad interface for the 'Remarks' screen. On the left, there is a sidebar with a list of categories: '1 - ADMINISTRATION', '2 - INSPECTION', and '3 - CONTRACTS'. Each category has a date '11/10/11' and a brief description. The main area on the right shows a detailed view of a remark under the '1 - ADMINISTRATION' category. It includes fields for 'Category' (1 - ADMINISTRATION), 'Subcategory' (Adoption meeting), and 'Description' (Approval of the finalization of the meeting agenda. The minutes of yesterday's sitting have been emailed.). There are also fields for 'Paragraph' and 'Tap here to edit optional info' with a green plus icon. At the bottom, there is a button 'Add a paragraph'.

Category and subcategory


Remarks are classified by category and subcategory which you can personalize and order.

Rename a category or a subcategory

Tap the category or the subcategory field to modify it.

This screenshot shows the same iPad interface as the previous one, but with a dropdown menu open over the 'Category' field. The menu lists 'Previous entries' and the following categories: '1 - ADMINISTRATION', '2 - INSPECTION', '3 - CONTRACTS', 'Adoption meeting', 'Agreements', 'Visual inspection', and 'Project contacts'. The '1 - ADMINISTRATION' option is currently selected. A keyboard is visible at the bottom of the screen.

You can personalize the title of the category or subcategory of your remark by directly editing it or by choosing a title from the list.

Tap the  icon to delete the title. You have to confirm this action by tapping the red button Delete.

You can delete a remark directly from the list by swiping left over the remark title, then tapping Delete.


Reorganize categories and subcategories

You can reorganize your categories and subcategories by tapping the  button .

Slide the categories in any order desired and to confirm with the [Done](#) button.

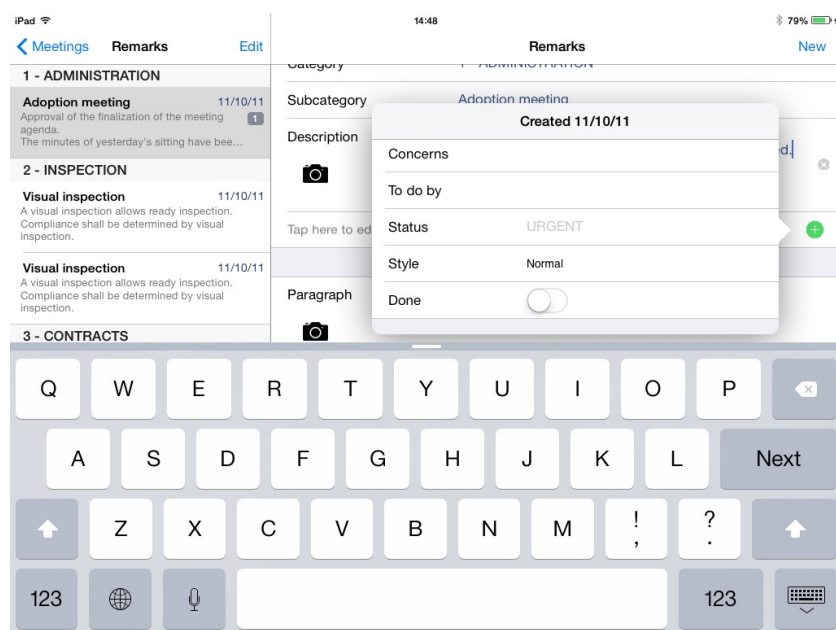
To reorganize the subcategories, you have to select the category first.

Description

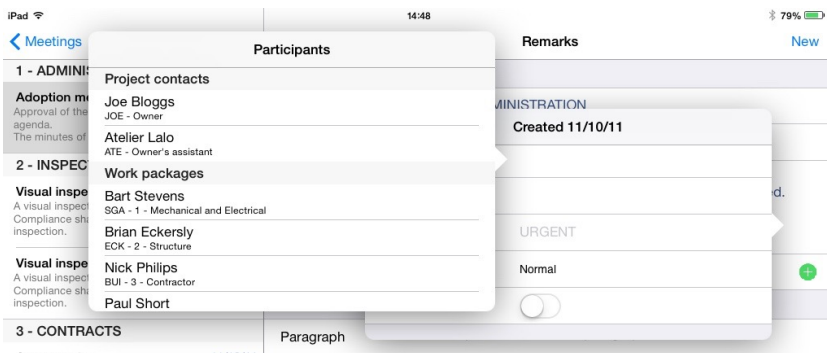
Tap [Description](#) to describe the remark. Tap the  button to add a photo or sketch to illustrate the remark.

Edit optional info

Use Tap here to edit optional info to modify various settings, such as concerns, the date, the status, the style...




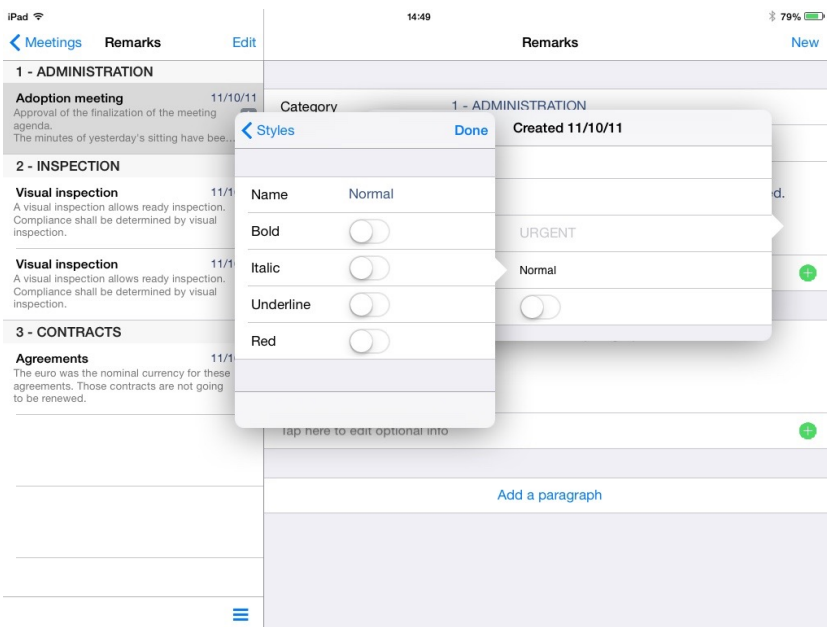
Tap **Concerns** to specify who is concerned by the remark.



Tap **To do by** to modify the due date.


Tap **Status** to assign a state to the remark, such as Pending, Reminder, To do, To schedule, Urgent or Warning. You can define new status yourself and delete any status no longer needed.

Tap **Styles** to determine the nature of the remark, Important, Normal, Urgent which you can personalize by tapping the button  for a better identification and to show the remarks in bold, italic, underline or red.



Tap **Done** to mark the remark as solved. The remark will be drawn as solved in the list on the left.

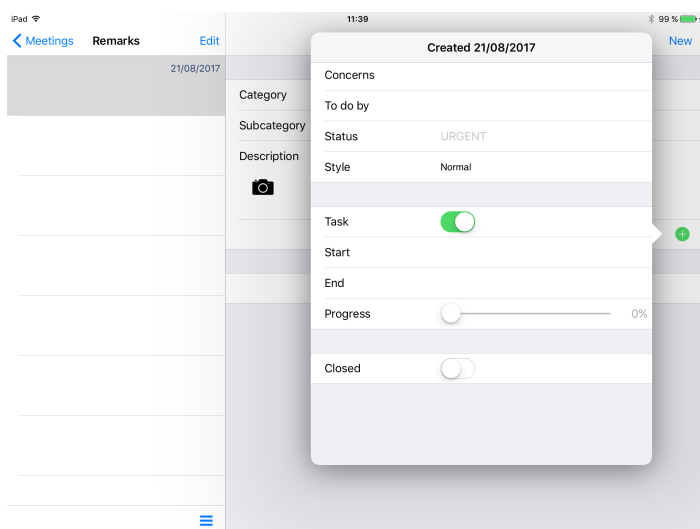
Transform meeting minutes in Task

Touch the button  and scroll down, activate the Task button.

Add a start date and an end date.

You can also indicate yourself how your task is going thanks to the progress bar.

When the progress bar hit 100% the remark changes its status automatically to [Closed](#).

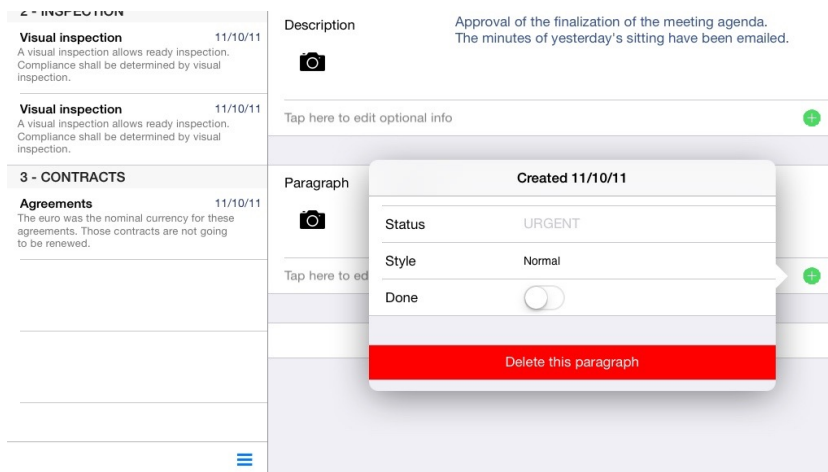


Add a paragraph

Tap [Add a paragraph](#) to add a new remark. The number of paragraphs defined in a remark is displayed in the list of the remarks on the right in a grey frame.

Delete a paragraph

Tap the  button and scroll downward to see Delete this paragraph.



Please note that this action cannot be undone.




Create a remark

Use the [New](#) button to add any remark which will add automatically in the category of the previous remark.

You can delete a remark from the list by sweeping your finger on the left directly on the title of the remark, then tap Delete.

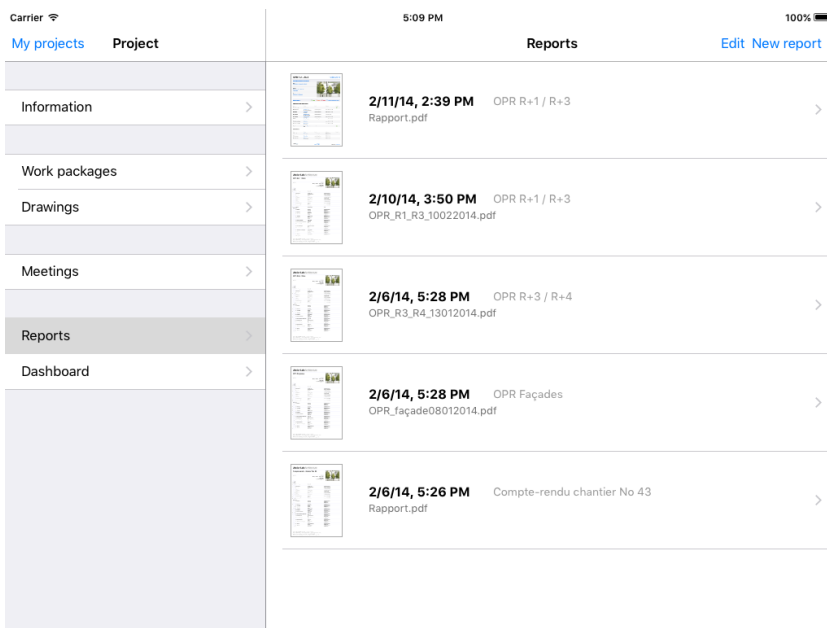
Edit a remark

Use the [Edit](#) button to edit any remark of the list.

Tap  the  icon to remove the remark. You will have to confirm this action by touching the  Delete button.

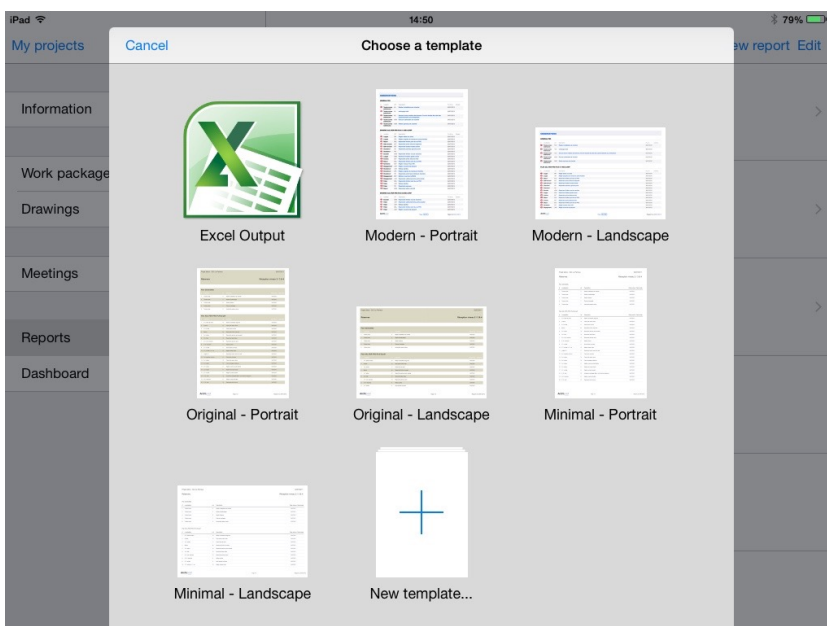
8 - Reports

At the end of your site meeting you most likely want to generate a report and send it out to the others working on the project, such as general contractors and subcontractors so they know what they have to work on.



New report

Tap [New report](#) to create a new report,.



Choose a template for your report.

For free you can use our website archipad.com to create a report template which will allow you to generate reports with your header and footer and company logo.

Depending on the layout you selected, the following dialog will display:

The screenshot shows the 'Choose a template' dialog on an iPad. The sidebar on the left lists various categories: My projects, Information, Work package, Drawings, Meetings, Reports, and Dashboard. The main content area is titled 'Minimal - Portrait' and contains several sections:

- Meeting**: A dropdown menu showing 'Meeting' and '3 Mar 2015 - Carpentry'.
- File name**: A text field containing 'Report.pdf'.
- Sections to include**: A section with a dropdown menu showing 'All' and a toggle switch for 'Excel report (.xlsx)'.
- Participants**: A section with a dropdown menu showing 'Columns' and a list of columns: Function, Contact, Address, Email & Phone, Present, Convened on.
- Observations**: A section with a dropdown menu showing 'Title' and 'Observations'.
- Work packages**: A dropdown menu showing 'All'.
- Drawings**: A dropdown menu showing 'All'.

A 'Generate report' button is located at the top right of the dialog.

Meeting

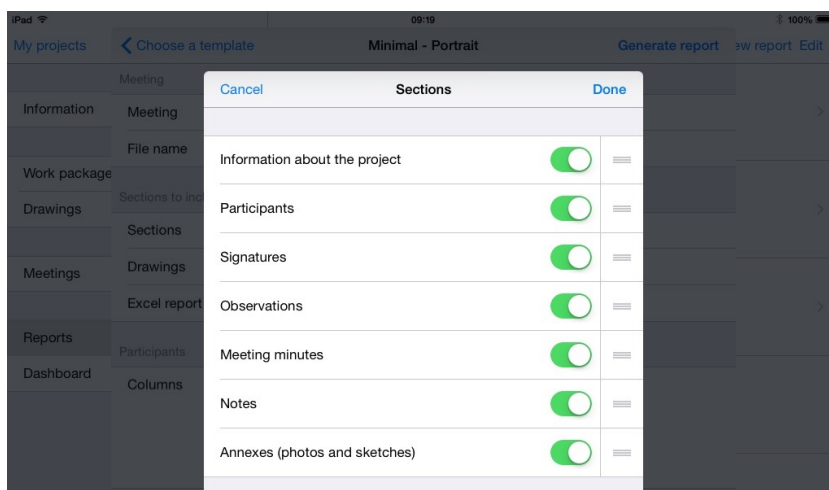
The [Meeting](#) field allows you to select the meeting for which you want to generate your report. By default, Archipad uses the last meeting.



File Name


Use the [File Name](#) field to specify the file name of the report generated by Archipad.

Sections

You can personalize your report by organizing the order of sections in the list, and you can also personalize how each of the sections is shown in the report.



To include or exclude a section in your report, tap the button  to include or  exclude the section.

Tap the move icon  and slide the different sections to order them.

Tap the [Done](#) button to confirm your settings.

Drawings

You can include the drawings in the report. The drawings will be included in a unique document with the observations, the remarks and the drawings.

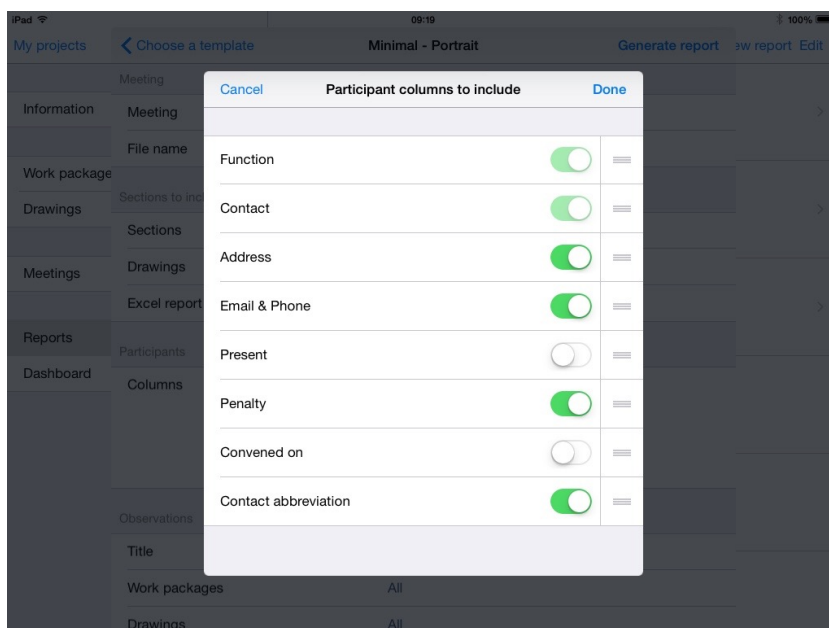
You can also group the drawings as a separate document. Archipad will generate one PDF with your observations and remarks and one PDF with all the drawings.



Excel Report


When you check Excel Report (.xlsx), an Excel document with your observations and remarks and other information you include in your report will be generated.

Participants

You can personalize the list of participants by organizing the order of columns to include.

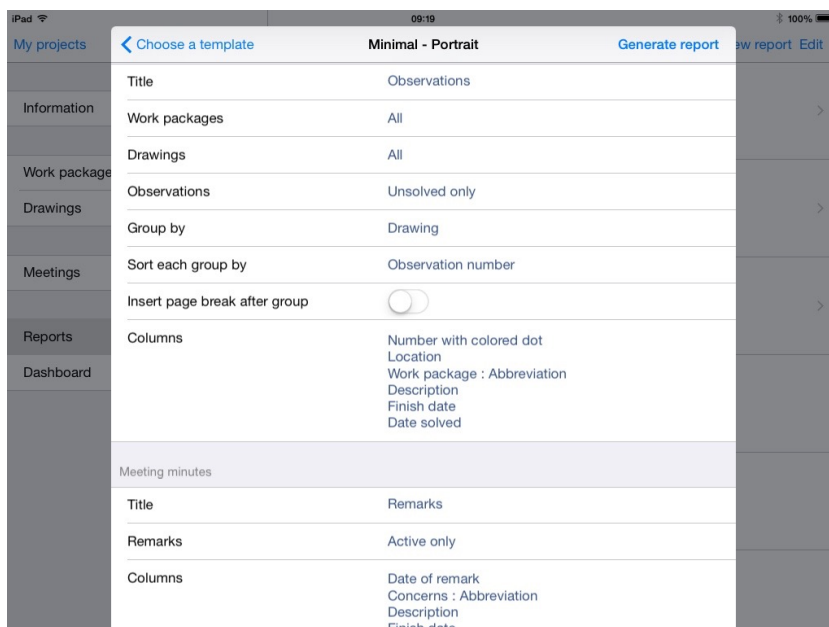


To include or exclude a column in the Participants section, tap the button  to include or  exclude the column.

Tap the move icon  and slide the different columns to order them.

Tap the [Done](#) button to confirm your settings.

Observations section

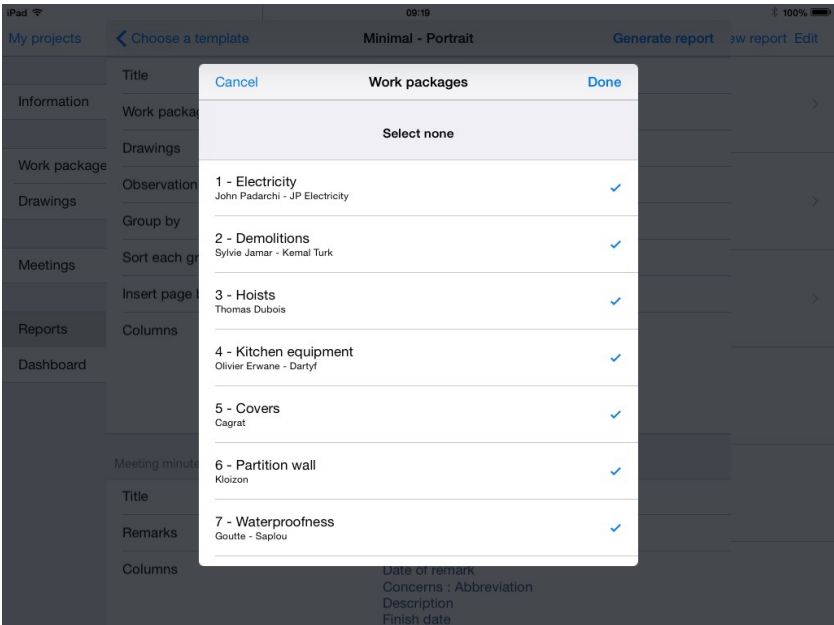


Title

Tap [Title](#) to define the title of the Observations page. A list of previously used titles will be shown and will automatically update with each new title you add.

Work packages

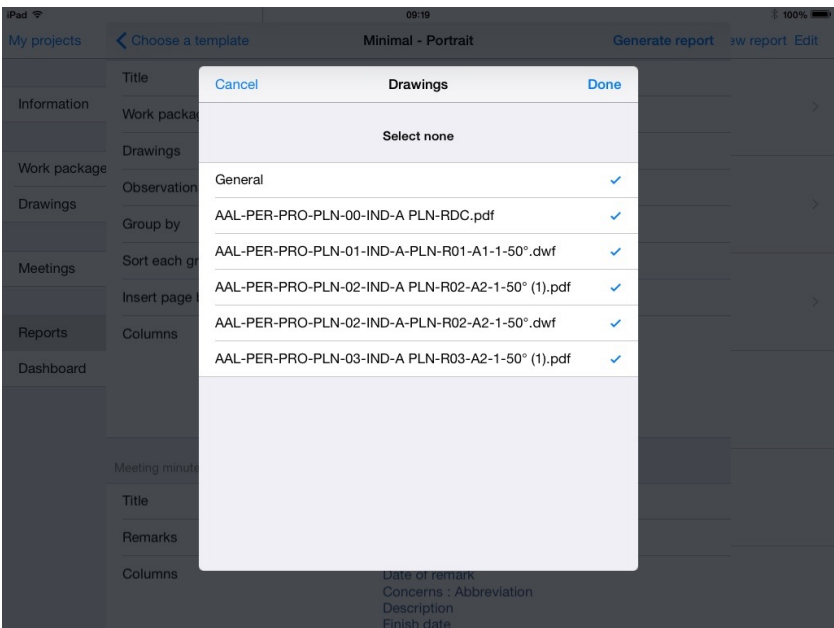
Choose the work packages to include to this report. You can choose one, everything, or a set of work packages in your report. The observations attached to the selected work packages and those associated with all building trade will be included in your report.




Tap a work package of the list to select it or unselect it. All work packages annotated of ✓ will be included in the report.

Drawings

Choose the drawings to include to this report. You can choose one, everything, or several drawings in your report. Only the observations annotated to the selected drawings will be included in your report.



Tap a drawing to select it or unselect it. All drawings annotated of  will be included in the report.

Observations

Select [All](#) to include all observations of this meeting, including those that you closed, [Unclosed only](#) to include only those observations that have not been closed yet, or [Selected meeting only](#) to include only the observations created or closed. [Select Active and this meeting only](#) to include all active observations and all observations that have been added or closed during this meeting.

Group by

Tap [Group by](#) to group all observations by [Work packages](#), [Location](#) or [Drawing](#).

Sort each group by

Depending on the group of observations you select (Work package, Location or Drawing), this group can be sorted by, [Observation number](#), [Work package](#) or [Location](#).

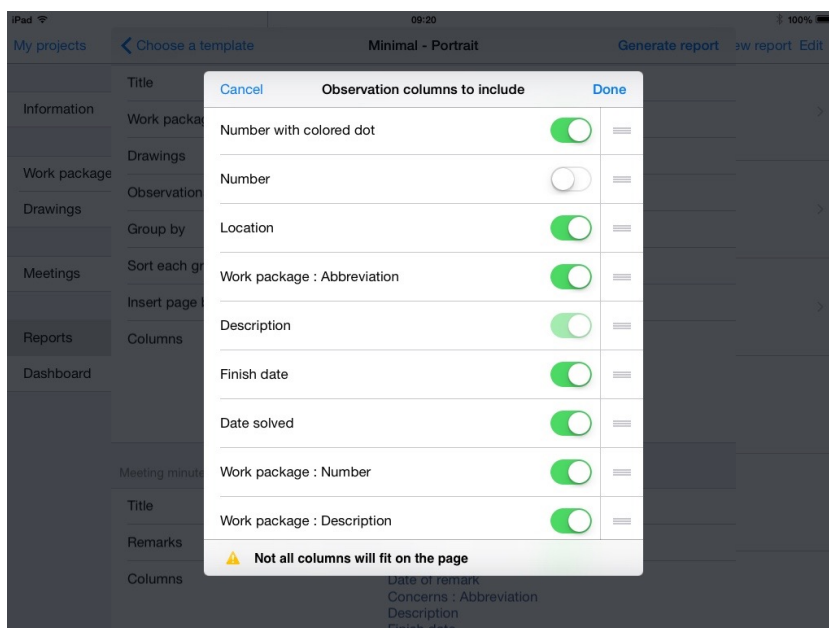
Insert page break after group

Tap the [Insert page break after group](#) switch to have each new group start on a new page.


Columns

Select which columns to include in the observations list, such as the number, the location, ...

If the number of selected columns exceeds the page size, a message will display to warn you not all columns will fit on the page. Deactivate certain columns or modify the orientation of the report by choosing another template.



To include or exclude a column in the observations section, tap the button  to include or  exclude the column.

Tap the move icon  and slide the different columns to order them.

Tap the [Done](#) button to confirm your settings.

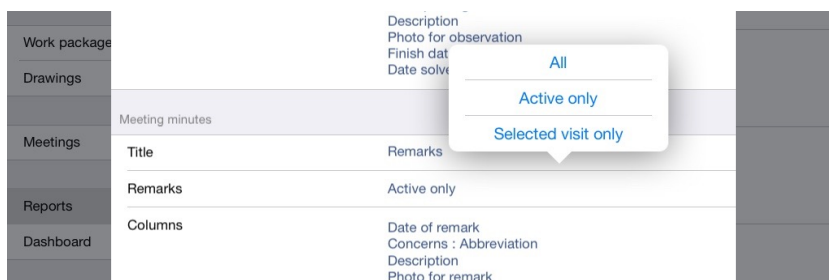
Meeting minutes section

Title

Tap [Title](#) to define the title of the Meeting minutes pages. A list of previously used titles will be shown and will automatically update with each new title you add.

Remarks

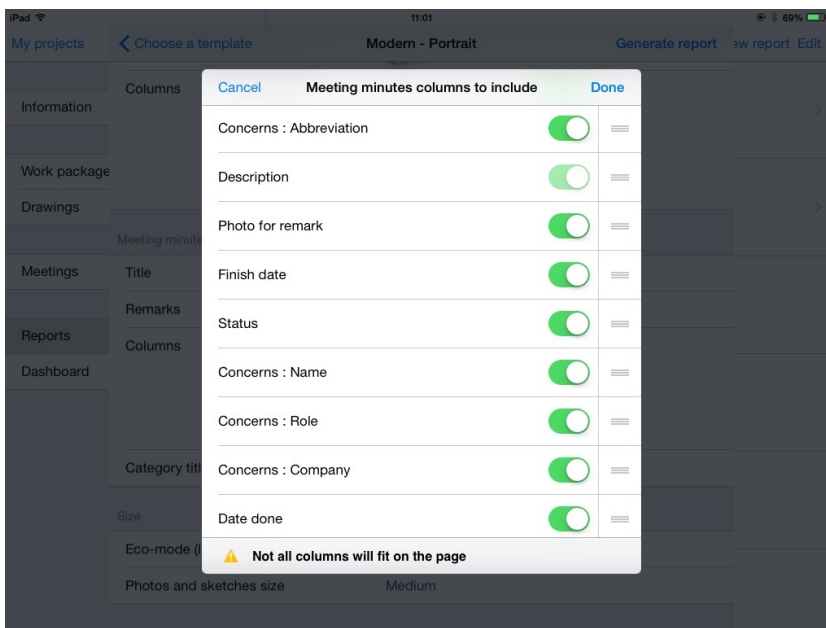
Select [All](#) to include all remarks of this meeting, [Active only](#) to include only the remarks not marked as done, or [Selected meeting only](#) to include only the remarks of this meeting.






Columns

Select which columns to include for the meeting minutes, such as the date or the description.

If the number of selected columns exceeds the page size, a message will display to warn you not all columns will fit on the page. Deactivate certain columns or modify the orientation of the report by choosing another template.



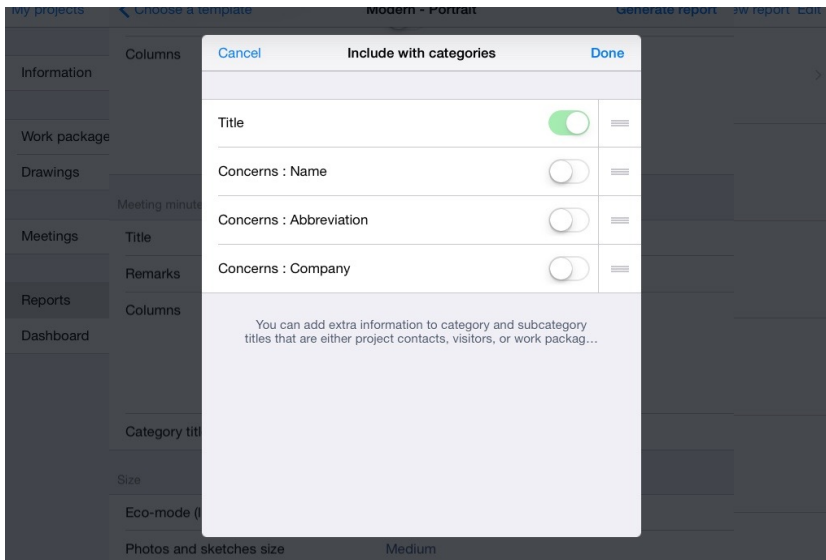
To include or exclude a column in the meeting minutes section, tap the button  to include or  exclude the column.



Tap the move icon  and slide the different columns to order them.

Tap the **Done** button to confirm your settings.

Title of the categories

Choose the titles of the categories to include with the Meeting minutes and information of the participant, such as title, name, abbreviation or company.



To include or exclude an additional information in the categories titles, tap the button  to include or  exclude the information.

Tap the move icon  and slide the different additional informations to order them.

Tap the [Done](#) button to confirm your settings.

Size section

Eco-mode (limit number of pages)

Use the Eco mode to reduce the number of pages in the report.

Photos and sketches size

You can choose 3 different sizes (Small, Medium, Big) of photos and sketches to include in the report.

Generate and share report

Generate report

When you finished configuring your report, tap [Generate report](#) to generate your report.


This action might take some time depending on the number of observations, drawings, photos and sketches that are to be included in your report.

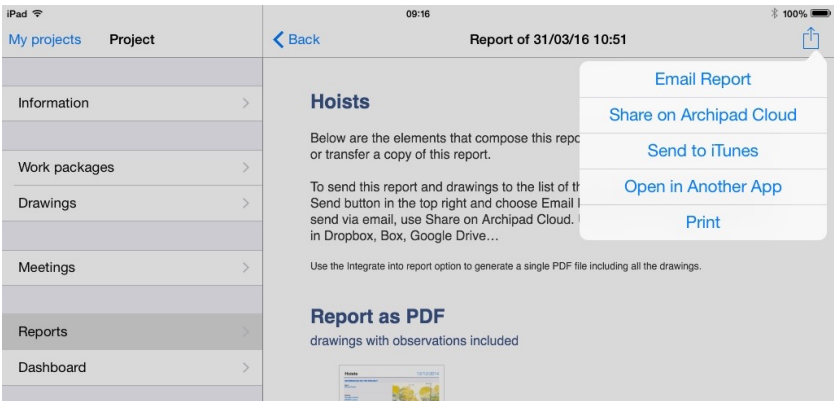
When your report is ready, it will display in the right list. You will be able to preview any elements that constitute your report: the report as PDF document, the report as Excel

document, and Drawings with PDF observations in which each dot will indicate an observation.

Tap the document you want to preview. It will display in a separate dialog.

Share report

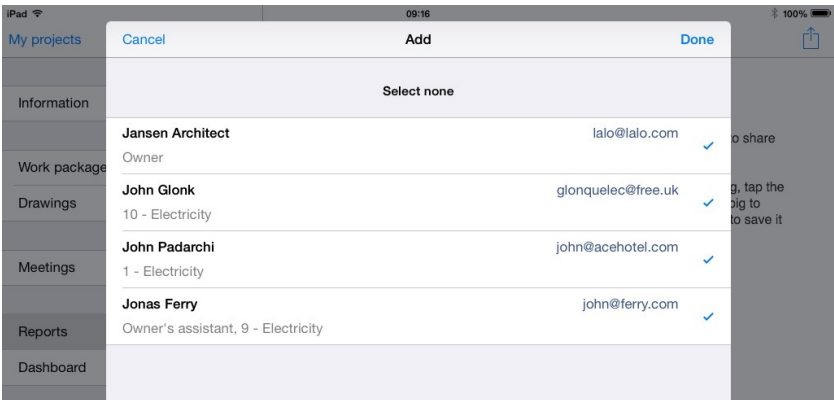
Use the  Share button to share your report directly from your iPad with others using one of several methods.



Email report

Tap [Email report](#) to email your report to everyone supposed to receive a copie of the report. A first dialog will present you a list of all project contacts in which you can select the recipients.

Please note that before you can send a report by mail, you must have Mail set up and configured. You also need an Internet connection to send your report. Use the Settings app, and scroll to the Mail, Contacts, Calendars setting to configure or create your mail account. Until this step is performed, you will not be able to send reports by mail directly from your iPad. You will have to send the report to iTunes first, and then send the report from your computer.



When you tap [Done](#), the report and all associated drawings will display in your regular mail window. In this mail window, you can add and remove people from the To, Cc/Bcc list, and change the subject and message of the mail.

You can also add an attachment with the « paperclip » button. You can also remove any attachments included in the mail. If you do not want to send the Excel document along with the report, select the Excel document and remove it.

Once you are done preparing your mail, tap [Send](#) to send the report.



Share on Archipad cloud

Tap [Share on Archipad cloud](#) when a mail is too large to send using email. In this case your report will be shared using Archipad cloud, and the email will only contain a link to the PDF Archipad cloud. Rather than including the report which will make it impossible to send large reports, only a link to the report is sent. The recipient can then open the link and download the actual report.

Send to iTunes

Tap [Send to iTunes](#) to save your report to iTunes.

For information how to import ad export files using iTunes from Archipad, please read chapter 1 - My projects. The section about importing

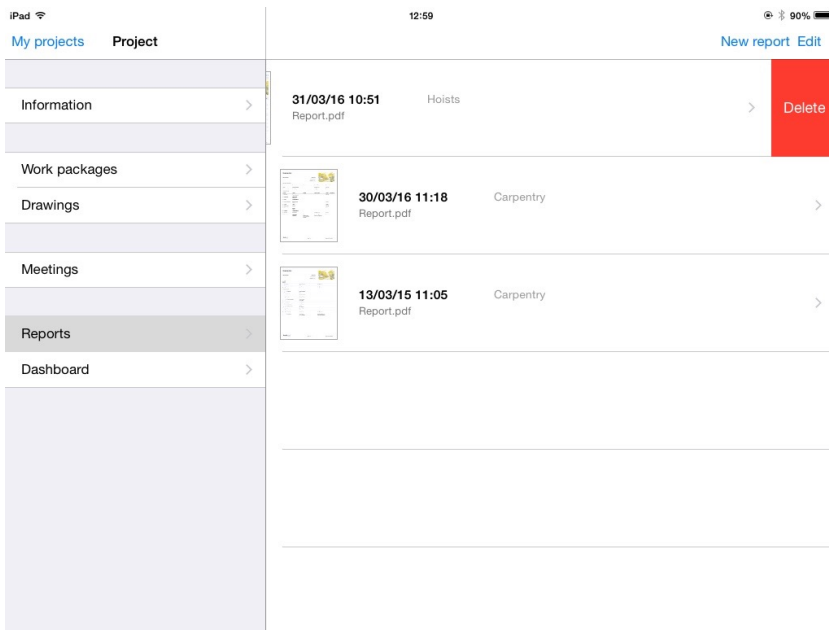
Open in Another app

Tap [Open in Another app](#) to open a report in another app of your choice.



Print

Choose [Print](#) to print your report using an AirPrint printer.

Delete a report



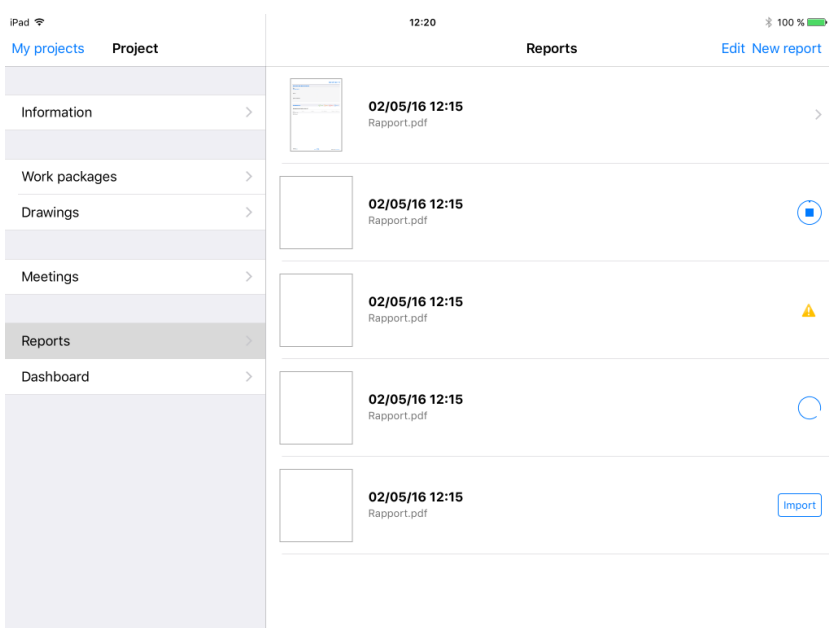
Use the [Edit](#) button to delete a report.






Tap the  icon to remove the report. You will have to confirm this action by touching the  Delete button.

You can delete a report from the list by sweeping your finger on the left directly on the title of the report, then tap Delete.

Report status

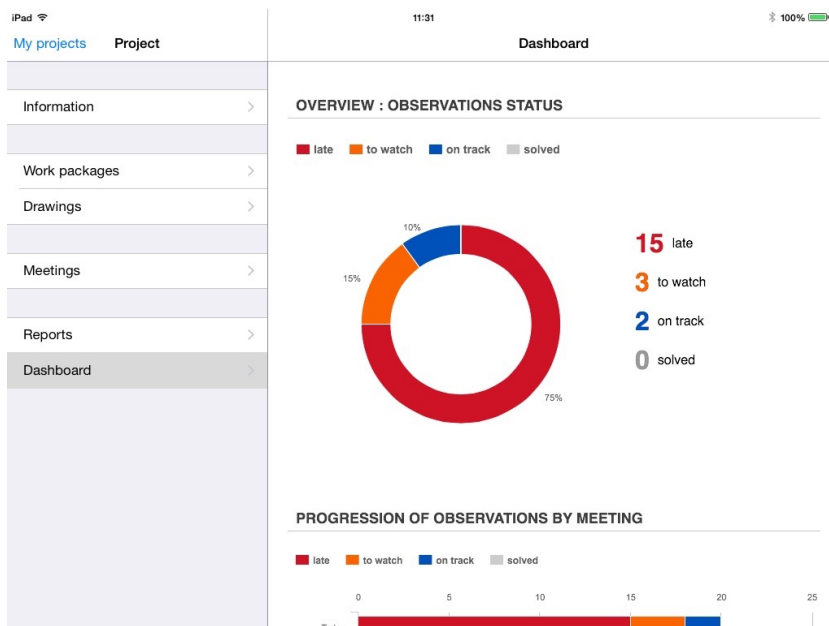
Reports shown in the Reports section can be in one of five different states.



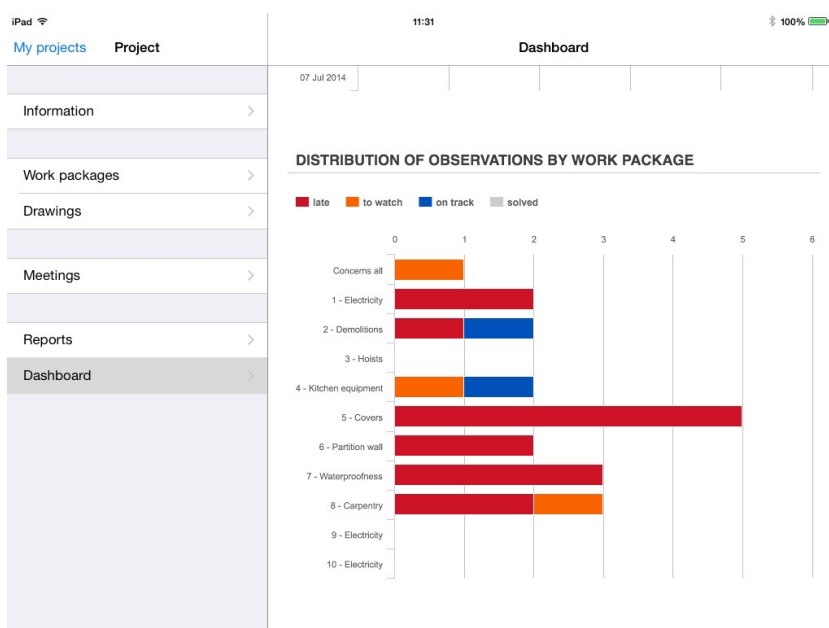
Status	Meaning
	Report is on your iPad. You can browse and share the report directly from your iPad
	Report is in the process of being downloaded. To cancel the download, tap the progress button which indicates the percentage the report is downloaded.
	There was a problem during download. In case of a download error, tap the report to try again. Tap the orange triangle to download your report
	Report is waiting to start to download. Typically this will show when you select many reports to download
	Report is not downloaded. Tap the Import button to download the report to your iPad

9 - Dashboard

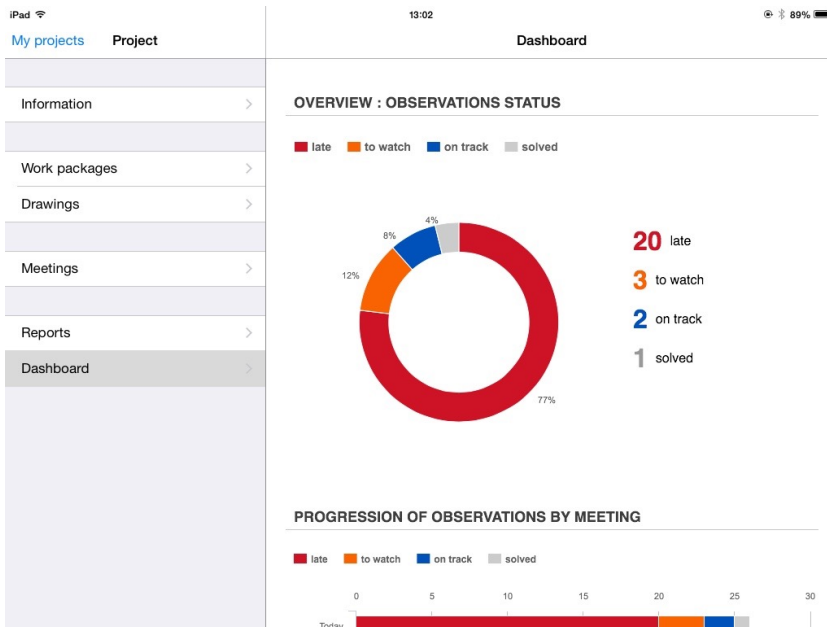
The dashboard shows you the observations status by project. You can also see the progression of observations by meeting, the distribution of observations by work package and by drawing.



Tap a meeting, a work package or a drawing to see the detail:

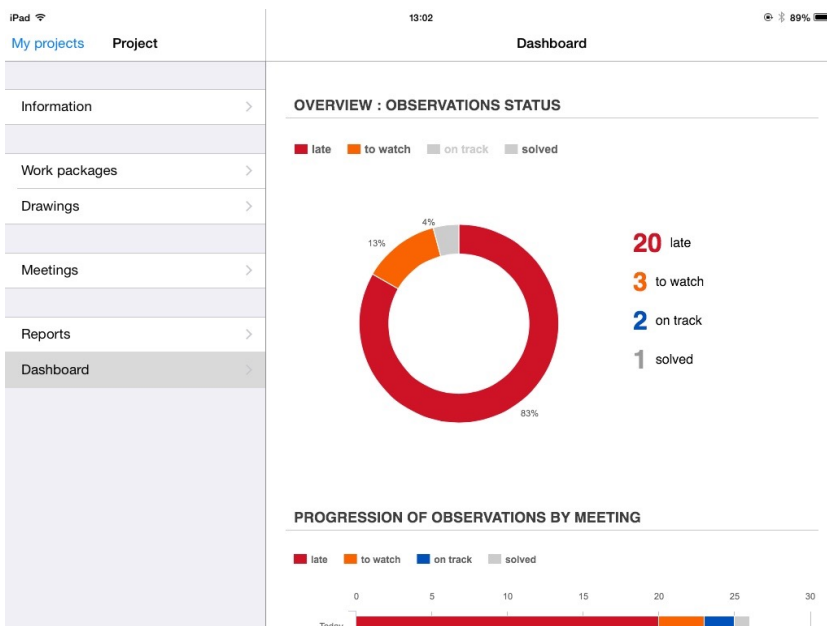


Initially, all information on the number of late observations, observations to watch, on track or closed, are shown.



Tap one of the captions under the chart name to exclude observations with that status.

The caption will display shaded, and will no longer be taken into account in the chart. Tap the caption again to include observations with that status.



10 - Archipad Mobi

Archipad Mobi is a tool that will help you to manage your project. This tool will be used by your work packages in order to tell you that they have marked an observation as solved.

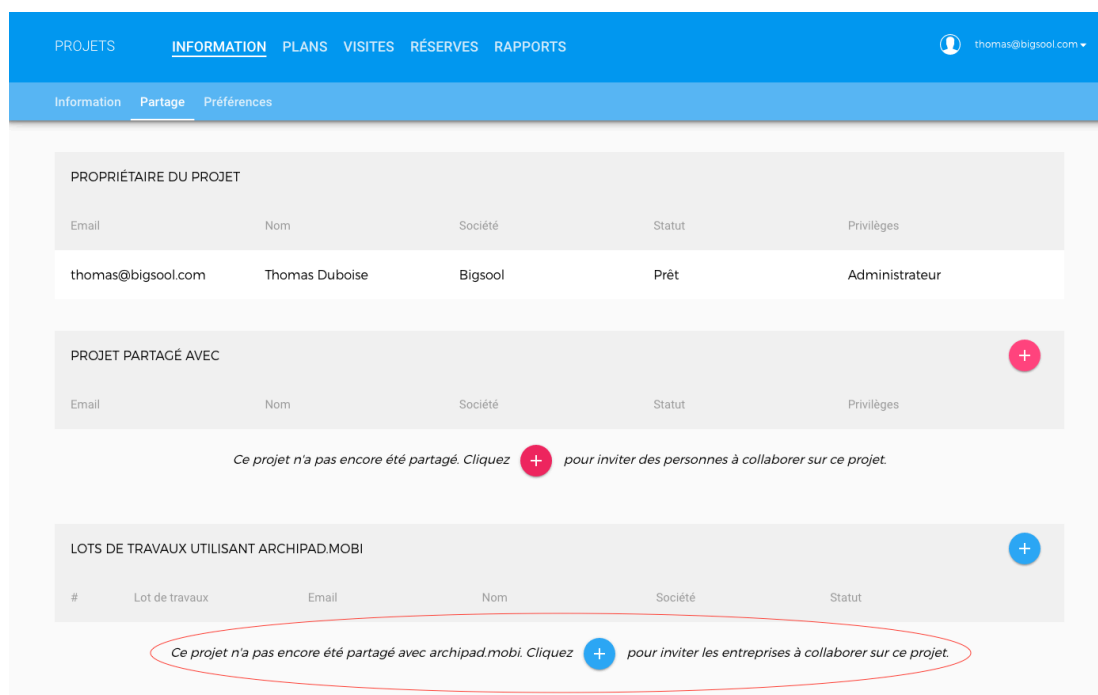
Your work package will be able to add also a picture and a comment on the observation.

You will see on your iPad before going on the building site what have been done during the time you were at your office or at home.

How does it work ?

It's really easy : First of all on Archipad Cloud select your project and go into the sharing menu.

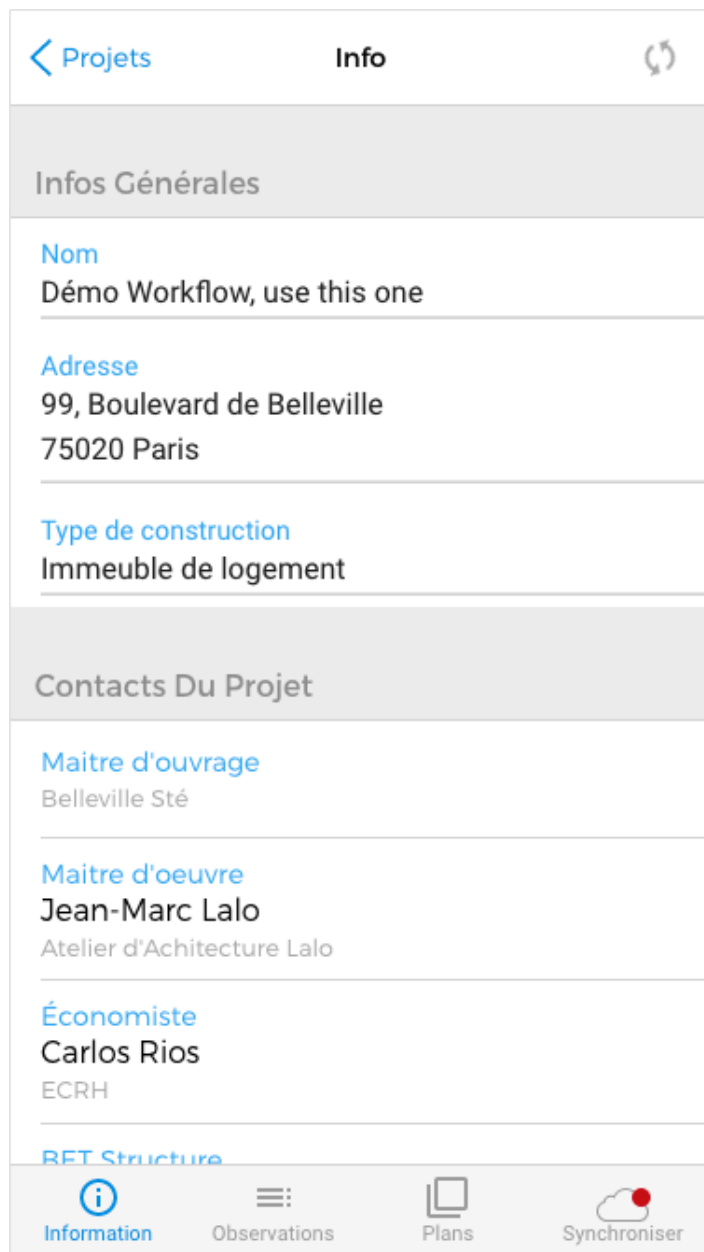
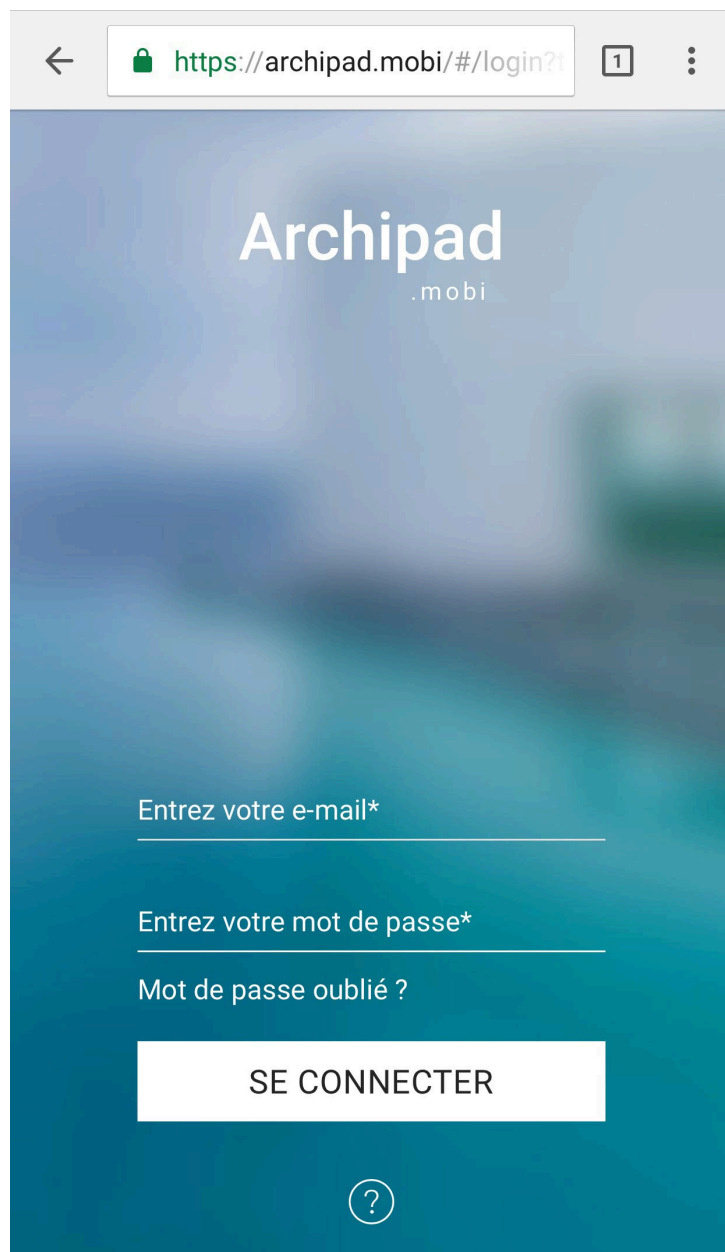
In the section “ Work package using Archipad Mobi”, add all the work package that you want to share your project with.



They will receive an e-mail with their id and password and also a link to Archipad Mobi.

How much Archipad Mobi cost ?

The answer is simple : Nothing ! This tool is accessible for free with your premium account.

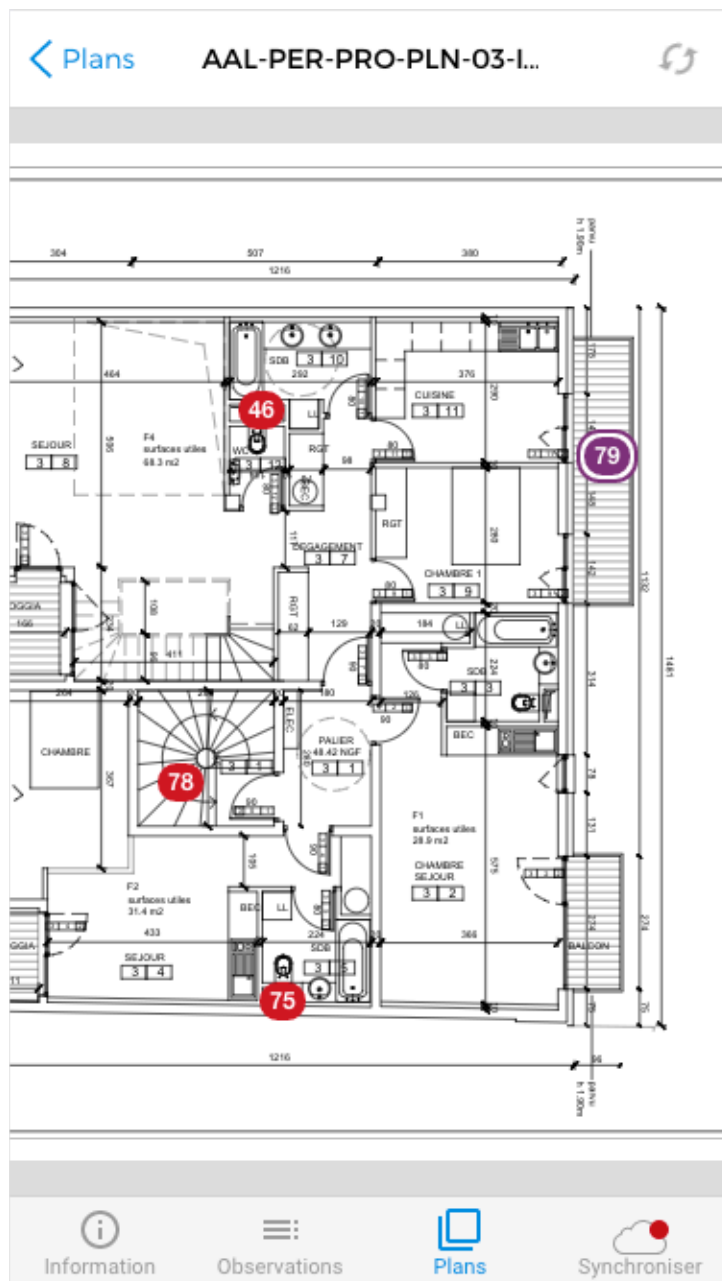
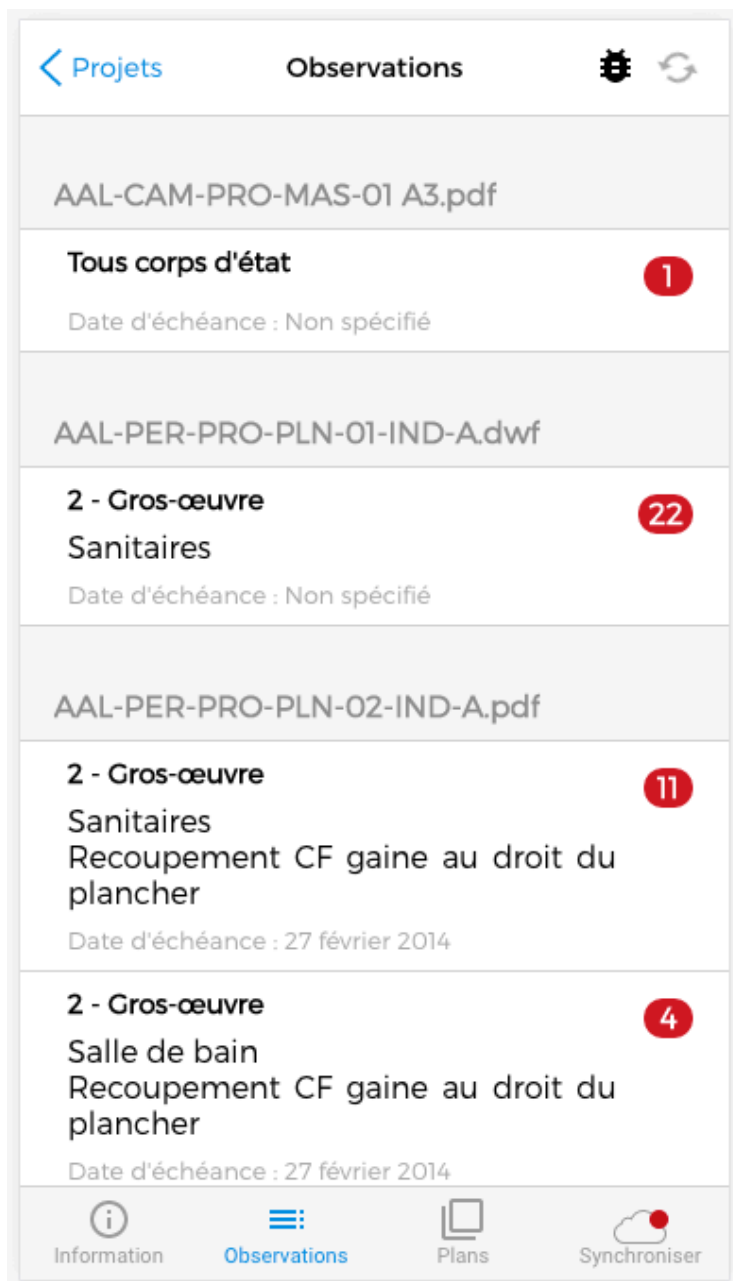


Archipad Mobi for work package

Once you invited a Work Package, that user can access your projet using Archipad Mobi using any smartphone with an internet connection (iPhone, Androids, Windows phone, etc.). They can access the project's information, observations list and the drawings. Alternatively, they can also access your projects using Archipad on an iPad.

Once the work package set an observation as solved this one will become purple. The user will have to synchronize at the end of the operations and then you'll be able to see what they've done on Archipad or Archipad Cloud.

Here is how Archipad Mobi look like :







Notes

This image shows a full page of a handwriting practice worksheet. It consists of multiple sets of three horizontal dashed lines, providing a guide for letter height and placement. The lines are evenly spaced across the entire page, which is otherwise blank.