Archipad version 1.4

User
Guide

Who should read this document

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

We hope we succeeded in creating an app that does not require you read the manual, but there will always be cases where you might not be aware of how to perform a specific action.

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. You can download the iPad User Guide here: http://manuals.info.apple.com/en_US/ipad_user_guide.pdf

What does this document contain

This document is a user guide. It describes how to perform certain actions in Archipad.

For a description of each option, button, control, etc. please read the Archipad Reference Manual. You can download the Archipad Reference Manual here: http://www.archipad.com/en/doc/archipad_reference_manual.pdf

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

This document describes Archipad version 1.4.
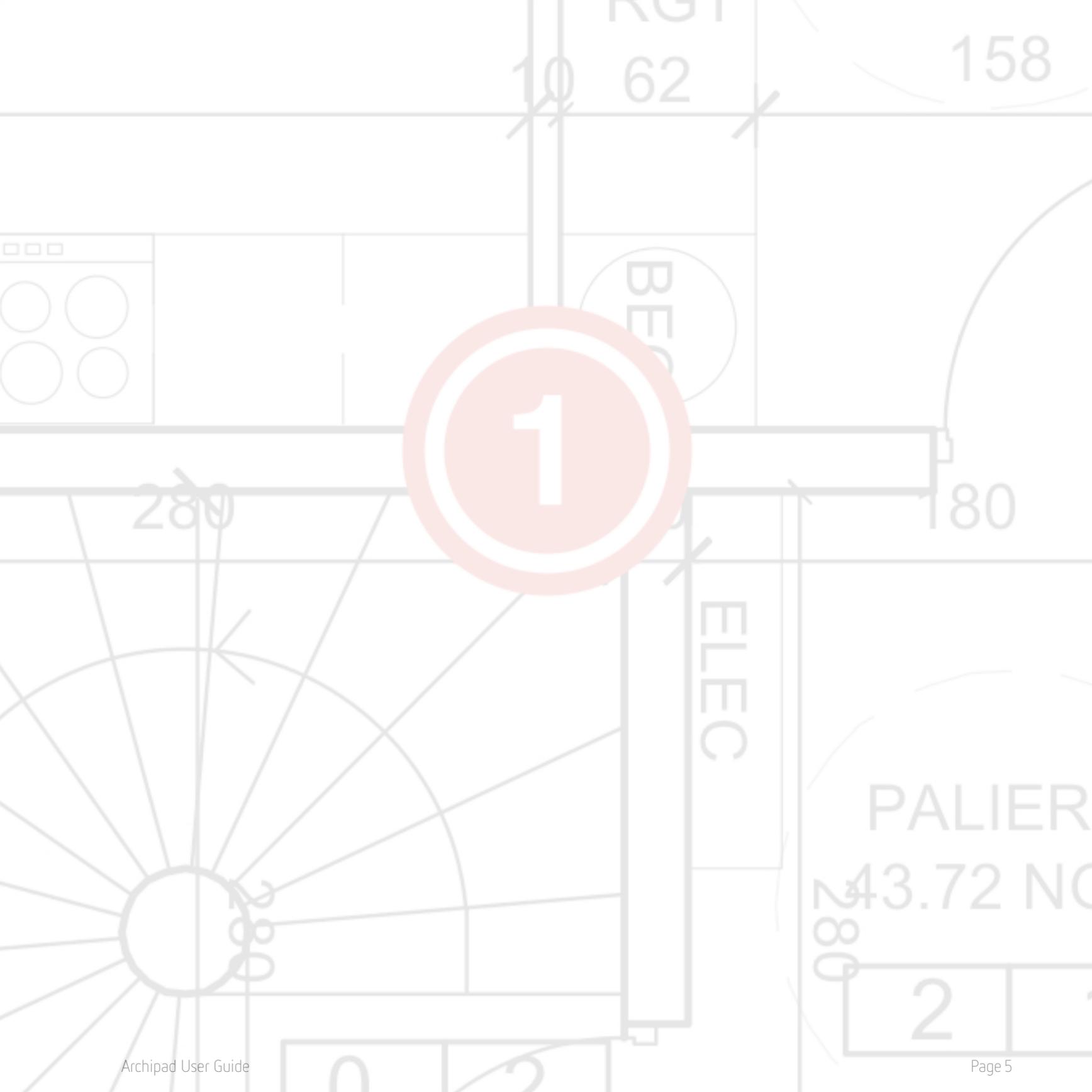
1 - What are Archipad and Archiweb?

Archipad is for your iPad, mobile, with you on-site

Archipad is the way you always wanted to manage your punch lists, easy, simple, efficient, and very fast,

- because you can point directly on your drawings to indicate the location where the defect is located and an observation is made,

- because entering descriptions for each observation is reduced to a minimum thanks to our Type Assist, and new text you enter is remembered so you will not have to type it the next time using Type Complete,

- because you can add photos and sketches with each observation which will describe better than a 1000 words,

- because at the end of a meeting, with a simple tap of a button, you will send your report,

you will see that you'll save more than 60% of time doing your walk through visits.

Archipad is the one tool you use from construction to delivery, to manage your construction site meetings, to organize your observations and retentions, which will reduce the time to enter observations and speed up your work.

You will gain time because you enter your observations directly on your drawings. Type only the first letters to select entire words and standard descriptions.

Archipad will help you with your information management. Send out your reports directly at the end of meetings, your contractors and sub-contractors will know what is expected from them immediately, no more delays of transcribing all your handwritten notes and preparing drawings, Archipad takes care of all that.

Keep track of all your previous visits, see the evolution over time, and always have all your plans and drawings in one location, with you at all times.

Archiweb is for your computer, back at the office, doing the heavy lifting

Archiweb is a companion product for Archipad, which allows you to enhance your Archipad. It is a web service for which you can create your free account, and start using some of the great features we have in store, for free.

Archiweb allows you to upload your own page design to customize your reports. Using our online tool, you define the header and footer are that contains your header and footer, so that Archipad will not print in that area. This personalized report will be automatically downloaded to your iPad the next time you open Archipad, ready to use for your reports using your company logo, header and footer.

Using Archiweb you will be able to synchronize several iPads working on the same projects, and manage iPads from your Archiweb control panel, updating each iPad with the consolidated version of the projects.

Archiweb will allow you to manage your reports, drawings, and photos online, so you are no longer limited to send your reports by mail.

For details on Archiweb, please refer to the online documentation on the Archiweb web site at http://www.archipad.com/user

And Archipad Lite?

Archipad Lite is a free download, and the same as Archipad. It allows you to use Archipad without paying to make sure that Archipad is to your liking and does what you need.

As a free trial it will not allow you to create new projects.

Because this is most likely something that you would also like to try, you can use in-app purchase to buy individual projects. Where Archipad allows you to create unlimited projects, Archipad Lite allows you to purchase new projects as you need them.
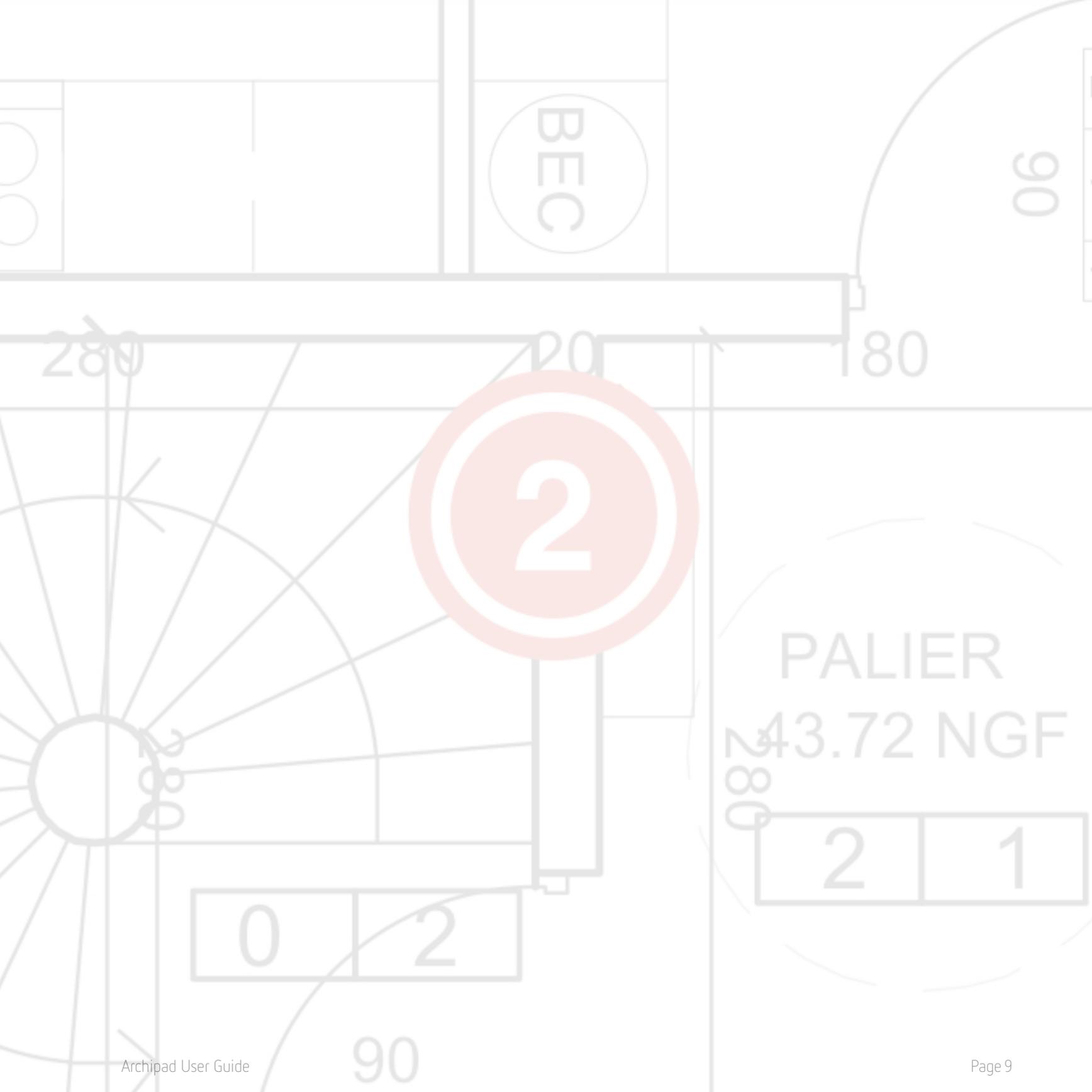
2 - Getting started with projects

A project is where all the information about any of your construction sites is kept. A project contains all the plans, work packages, meetings, and observations. Each project contains it's own work packages, drawings, meetings, observations, and reports, which are only visible from within the project.

Archipad comes with a demo project for you to explore. Throughout this document all the examples will be using this demo project. When you are done viewing the demo project, you can simply delete it.

Creating a new project

When you are ready to start using Archipad, the first thing you will need to do is create a project. Tap the [icon] button, and choose New project. The new project card is automatically centered.
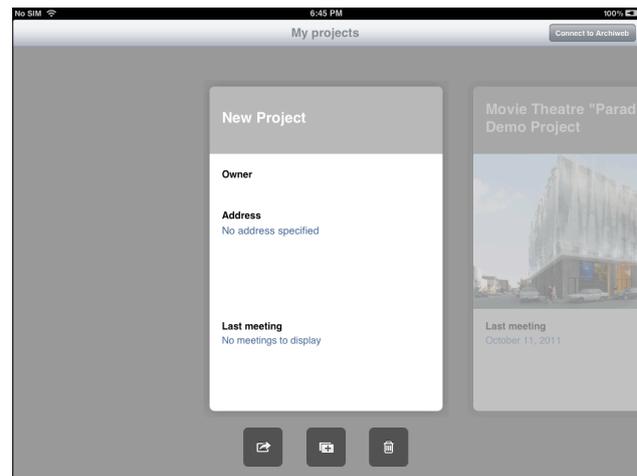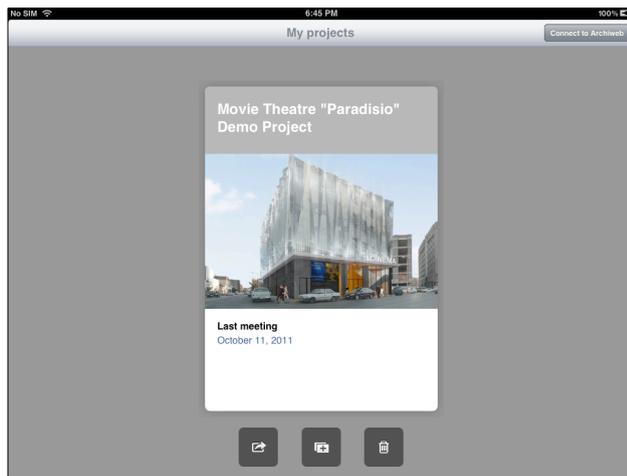
Scrolling the list of projects

Drag left or right to scroll the list of projects.

Importing projects

Use the **New** button to create a new empty project, or to import a project that was previously exported.

Tap **New Project** to create a new empty project. The new project card will be inserted to the left of the current project card.

Tap **Import from Archiweb** or **Import from iTunes** to view the list of projects that are currently available for import from the Archiweb server or that have been made available for import via iTunes.

If you are not yet connected to Archiweb, you will be prompted to connect. For more details on connecting to Archiweb, read **Connecting to Archiweb**.
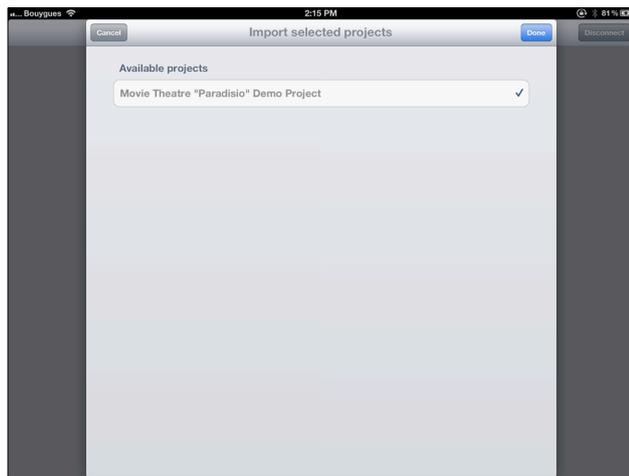
Select any project from this list, and it will be inserted into the list of available projects on your iPad.

Use Archiweb or iTunes to remove projects from this list.

Make a backup of your projects, regularly!

When you want to save your project on your computer in order to create, or because you want to send the project to someone else so they can work on a copy of your project, you export your project to iTunes or synchronize your changes to Archiweb.

⤤ Exporting projects

Use the **Export** button to share your project on Archiweb or send your project to iTunes.

Share on Archiweb

In order to share projects on Archiweb, you must have an Archiweb account. Connect to the http://www.archipad.com server, and navigate to Archiweb, or directly type archipad.com/user in your web browser.

Follow the instructions to create your free Archiweb account, and make sure to provide a valid email address, a confirmation email will be sent to validate your account creation.

Once your account is set up, you can connect to Archiweb from your iPad.
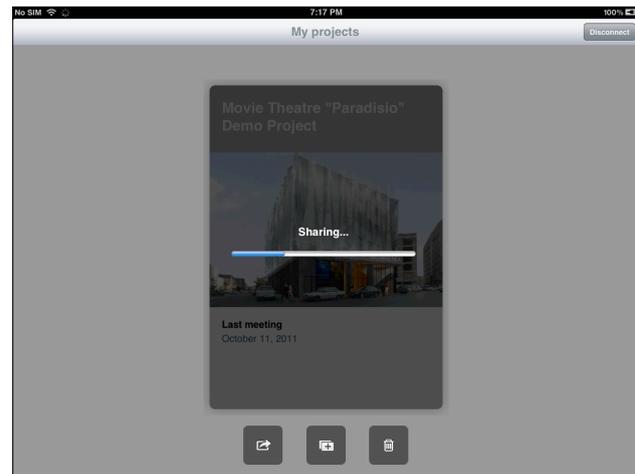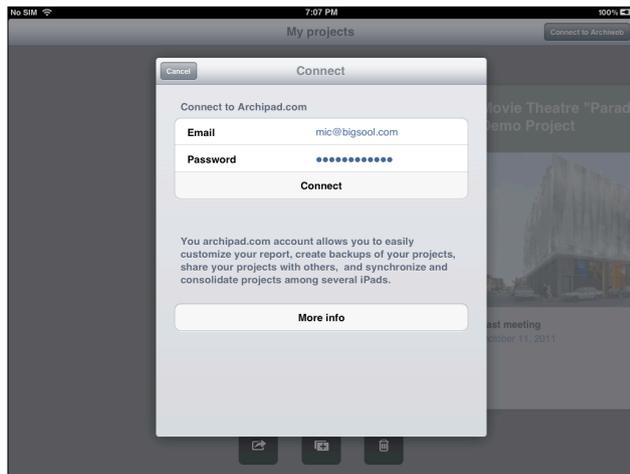
After the connection is established, you will see the sharing progress.

> For best performance, share when you are connected to the Internet using a Wifi connection. Later synchronizations can be easily done using any wireless connection, but the initial share takes much longer as all the drawings need to sent.

Once a project is shared on Archiweb, you can synchronize your changes to the server very quickly, as only the new data is sent, not the entire project.

Send to iTunes

Once a project is exported, and when your iPad is to connected to your computer with iTunes installed, you will be able to copy, and share the project with others. Any project that you export can be imported on your iPad at a later time, or on any other iPad.

Select your iPad in the list on the left, choose the Apps button in the top of your iTunes window, and scroll to the bottom until you see Archipad in the Apps list. When you select Archipad, the list on the right will show all the projects you exported, as well as any drawings that you might have added, and any reports you exported to iTunes.

🗑 Delete projects no longer needed

Use the **Delete** button to remove any unwanted projects. An action sheet will show when you tap this command to confirm this command.

If the project you are about to delete has any meeting in which observations were made, another confirmation dialog will show to make sure that you want to continue deleting the project.

This action can not be undone, so it might be a good idea to create a back-up of your project on your computer first, using the **Export** button.

✋ **Be careful not to delete a project you purchased using in-app payment**
When you delete a project you purchased using in-app payment, there is nothing we can do to recover it. So please be sure that you make your backups regularly, like this even in case of an accidental delete you will not loose your purchase.

Opening a project

Tap the card of a project to open it. If the project is not currently visible in the list of projects, scroll the cards to the left or right until your project is visible.

Like with many other iPad apps, Archipad's screens are divided in two sections, a list on the left, and the detailed view of the selected list item on the right. The project info screen is an exception, there is no list on the left, instead you will find the five steps you will perform in order to use Archipad to send out your reports.
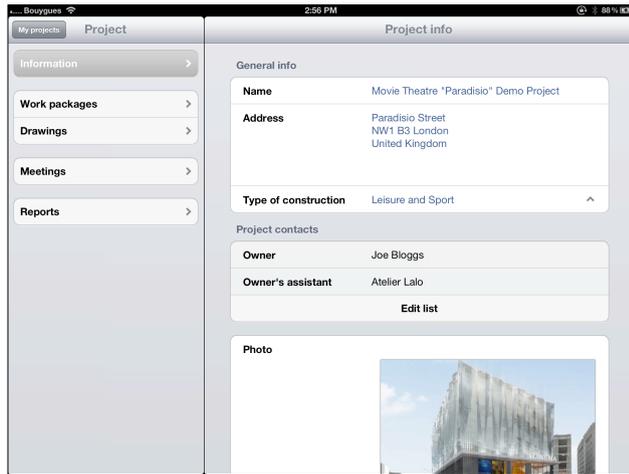
The buttons on the left are ordered such that you can follow this as a check list and work your way down.

Information	Enter information about the owner, location, type of construction, and maybe a photo or drawing of the project. The list on the left gives you a quick access to the other sections of a project
Work packages	Keep info about all the contractors and can keep track of when each contractor is supposed to start and finish, as well as track progress
Drawings	Import and manage your drawings here. Using iTunes or Dropbox, you can add drawings as you need for your project
Meetings	Create and manage meetings, and enter observations directly on the drawings that you added, and assign each observation to a contractor, with description and photos
Reports	Generate reports that you will send to the contractors and sub-contractors so they can fix the observations you assigned to each contractor and sub-contractor

Each of these sections is described in detail in the following chapters.

Create a template project to avoid repetitive tasks

Most likely you will be working with the same contractors and sub-contractors, and be using standard descriptions for the observations in your punch lists, for your different projects.

To avoid entering this information each time you start a new project, you should create yourself a template project rather than creating a new project each time, and clone this template.

The recipe to create a template project is simple:
1. start with one of your existing projects, and export it to iTunes,
2. import the project you just exported, open it and name it e.g. "Template project",
3. configure the work packages as you will use them most often, remember you can always modify a project once you cloned the template project,
4. remove the drawings and meetings from this project,
5. export the project to iTunes.
and you are done.

Next time you want to create a new project, rather than choosing **New project**, choose **Import from iTunes** and select the project you just exported.

You will now no longer need to enter each work package and the contractors and sub-contractors, You will also use consistently the same descriptions, as they will be preposed each time you enter text in a description.

All you need to do is add the drawings to this new project, and create your first meeting.
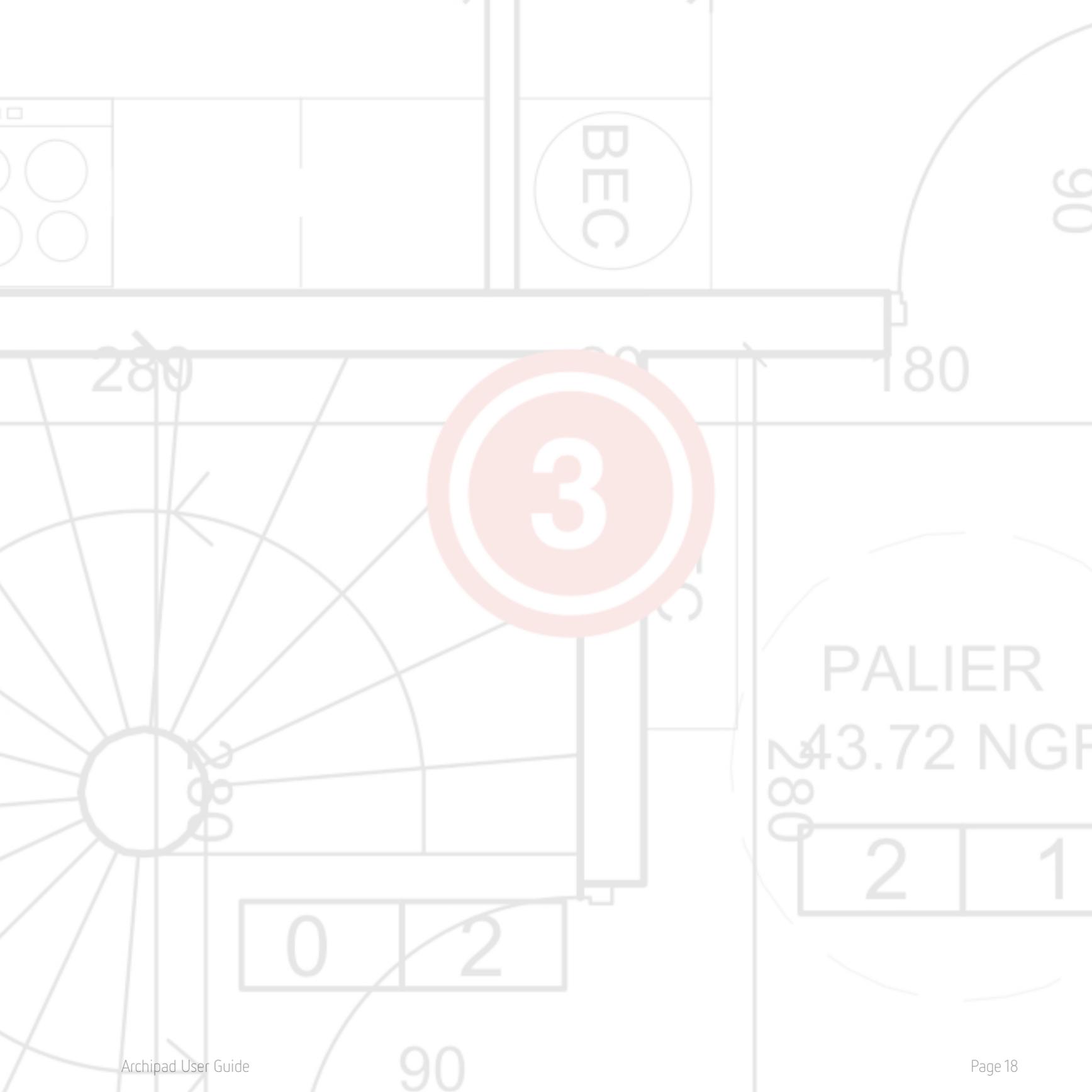
3 - Work packages, contractors, and sub-contractors

In order to assign observations for each contractor and sub-contractor, you define work packages they are responsible for. When doing your walk through visits, you will assign each defect you spot, or anything that must be taken care of, as an observation to the contractor or subcontractor in charge of that work package.

If you prefer to assign observations to a contractor or subcontractor rather than work packages, enter the name of the contractor or subcontractor in the description field.

Archipad will automatically number each work package, and increment by one the last work package if the **Number** field contained an actual number. Even though the first field of a work package is labeled **Number**, you can enter any text in this field. So "Smith&Sons", "Acme Paint Co.", "Roof - Tiling", "Roof - Isolation", "12", "12.5", are all valid values for the **Number** field.
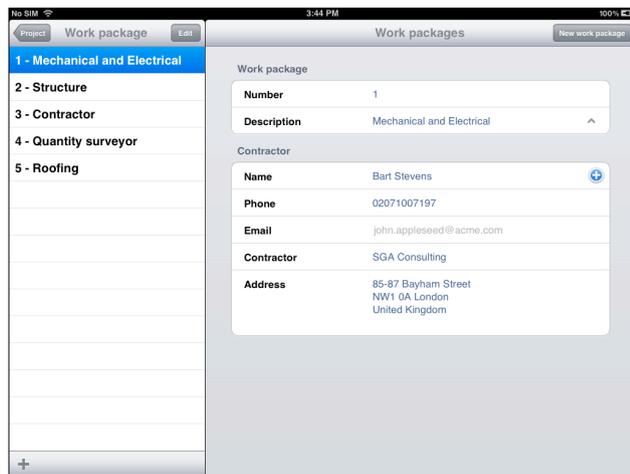
Adding a work package

You add new work packages using the **New work package** button or with the **+** button. The new work package will be selected in the list on the left, and display it's content on the right.

Enter the number for the work package and the description.

Tap the ⊕ button in the **Name** field to select an existing entry from your Contacts.
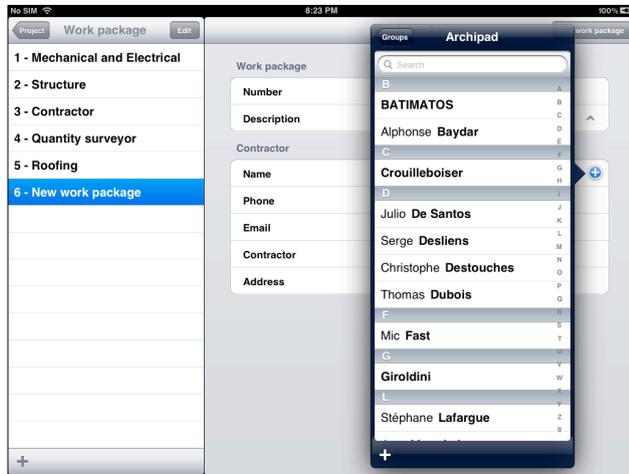
If your Contacts do not yet contain the contractor or subcontractor, use the ✛ button to create a new contact. This contact will be created in your Contacts, in a group named Archipad, so you can easily tell the contacts added by Archipad apart from those you have added yourself.

Updating contact information

Once in a while you might need to modify the contact information, a person in charge of a work package leaves the company, a phone number is changed, sooner or later you might need to modify contact information.

1. Tap the ⊕ button in the **Name** field to display the contact info,
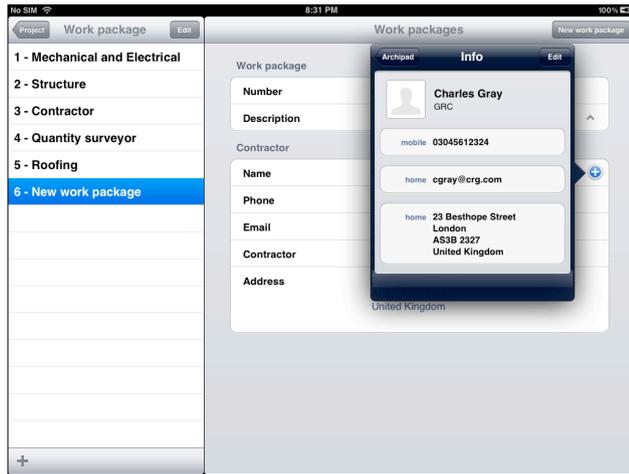
2. Tap **Edit** to modify the contact information and **OK** to confirm your changes.

Make sure contractors and subcontractors get your reports

When you send your report, Archipad will automatically prepare a list of recipients. This list will only include those contacts for which you entered an email address. You can of course always do this later, but now would be the best time to enter your contractors and subcontractors email address and be sure they will receive your reports.
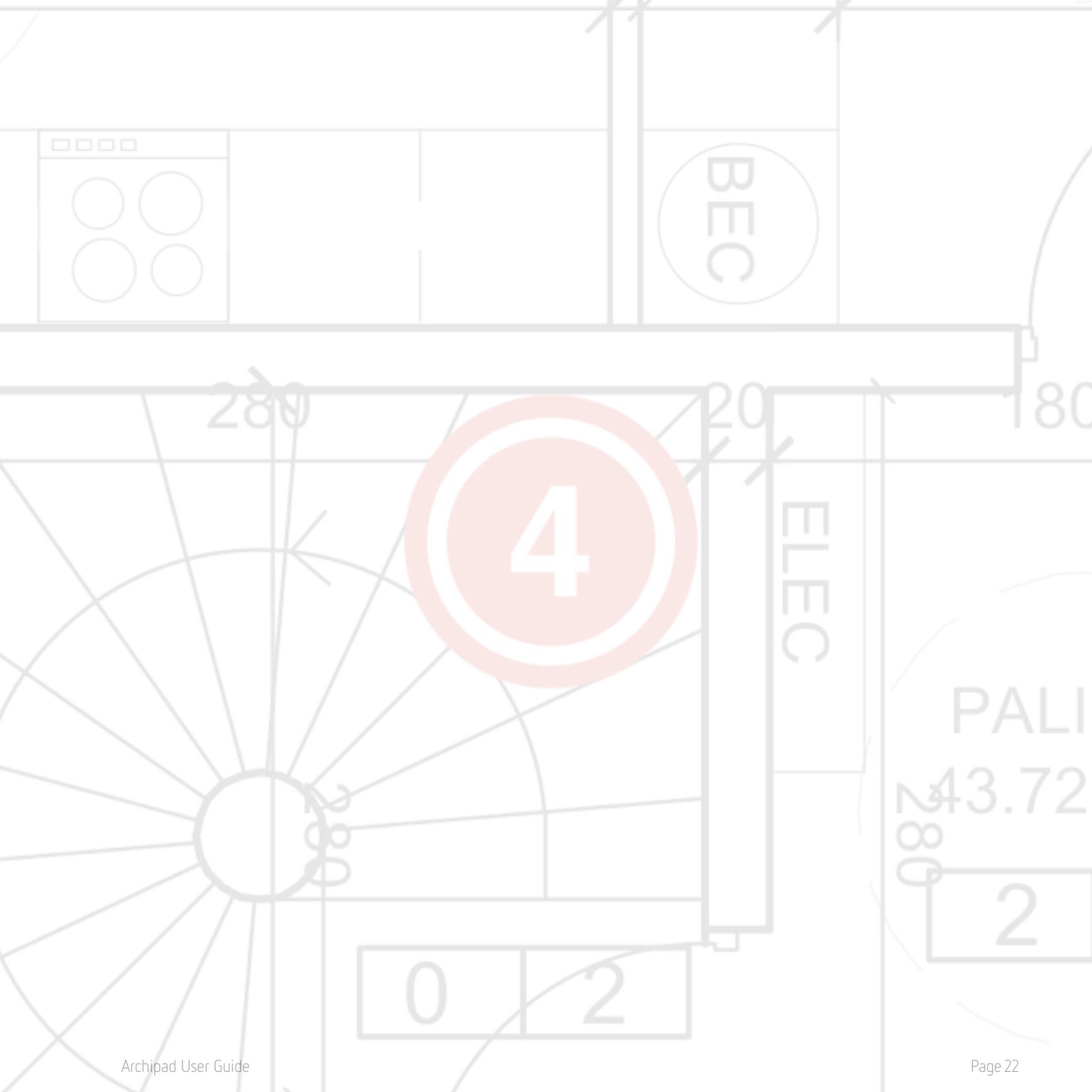
4 - Drawings

Drawings, maps, blue-prints, photos, roughs, sketches, PDF and DWF documents, anything that you can use to track work on a project can be used by Archipad, and is collectively called a drawing.

Use the Drawings section to import drawings from various sources, such as iTunes, Dropbox, or email. Select the documents to import, and Archipad will make local copies, and tile the drawing. Tiling is a process which takes a bit of time, but once done allows you to get incredible performance and quality while working with your drawings. It allows for incredible zoom and rotation, at amazing speed, with constant best quality.

> 💡 You should prefer to import your drawings ahead of a meeting, as it can happen that you might need to reduce the size of one of your larger drawings. Over time this is will become less true, but an iPad is no where near as powerful as your office computer.

Try to keep you drawings below 1M in size, either by reducing the area shown in the drawing, or by removing details that are not relevant for creating a punch list, such as trees, textures, and other elements that do make your drawings look good, but make them perform poorly on an iPad.
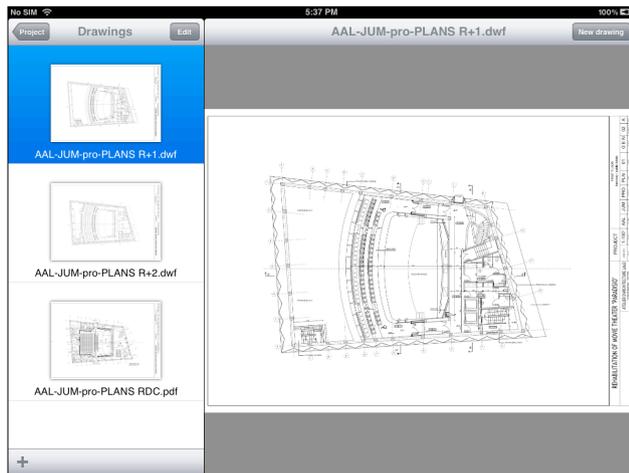
The list on the left shows the drawings that you have imported in this project. Pinch the drawing on the right to reduce or increase the drawing size.

When you reduce the drawing size below the size of the area on the right, you will see thumbnails of any other drawing you might have imported.
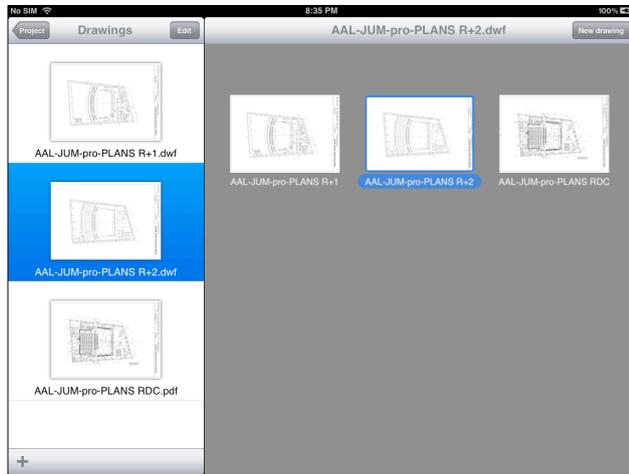
Using the thumbnail view allows you to navigate rapidly among different drawings.

Adding drawings to a project

You can import drawings from several different sources:

iTunes	Connect your iPad to your computer, then select your iPad in iTunes. Click the **Apps** tab and scroll to the File Sharing section, and drop your drawings on Archipad
Dropbox	Choose **New drawing** in Archipad, then tap the **Import from Dropbox** button. Navigate and select the drawings to import
Dropbox	Open the drawing in Dropbox, then tap the "**Open in...**" button and choose Archipad
Mail	Open the attached drawing in your mail on iPad and tap the "**Open in...**" button and choose Archipad
Choose Photo	Select an existing photo from your Photos library
Take Photo	Take a photo with the camera

Removing drawings

The initial versions of Archipad did not remove the drawing from your iTunes library when the drawings were imported. To remove these drawings in case you no longer need them, connect your iPad to your computer, then select your iPad in iTunes. Click the Apps tab and scroll to the File Sharing section to remove the drawings from Archipad. Select the drawings to remove first, then type the Delete key on your keyboard.

Only the first page of a PDF is imported.

If your PDF contains several drawings on several pages, only the first drawing will be imported.

What format drawings are supported?

The file format for drawings can be either PDF or DWF. Note that you can also use photos from your album, or take photos if your iPad has a built-in camera.

Storage of drawings is limited by iPad capacity (drawings are on average 500K, so your iPad can store at least 1000 drawings).

5 – Meetings and walk thru inspections

A meeting is where all the information of your on-site visits is kept. A meeting is identified by date, and you can enter a brief description about the purpose of the meeting.

Meetings contain all the information about the attendees, who was and who was not present, are they convened to the next meeting, and any guests that might attend. Each meeting can also add notes, that can be included in your report.

Once you have entered this information, and even if you did not enter anything, you are ready to start adding observations. Tap the **Observations** button to get started.

You must create a meeting before you can create and enter observations.
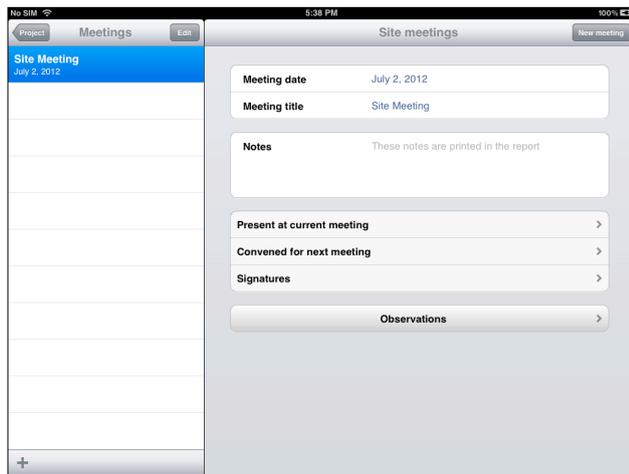
Meeting date

For each new meeting you create, the date will be set to the current date, but you can change this by tapping the date field and setting another date.

Meeting title

Meetings also have a title you can specify. This title will be used for the report you will generate at the end of the meeting.

Notes

You can take notes during the meeting, which can also be added to the report. You can enter notes on the meetings screen, but also on the observations screen. The observations screen has a **Notes** button that will show the same contents you see here. When you generate the report, you have an option to include the notes you took during the meeting in your report. They will appear as a separate page at the end of the report.

You would typically enter the next meeting date in the notes field, so that those you convene to the next meeting know when it will take place.

Managing the attendees

Before you start to add any observations, you should take a minute to specify who is present at the current meeting, who is convened for the next meeting, and maybe even make the attendees sign in case you want written confirmation they were present at the meeting.

There is great similarity among the dialog that shows when you tap on any of the three button to manage **Present at current meeting**, **Convened for next meeting**, and **Signatures**.

When you tap the **Present at current meeting** button, the following dialog will appear:
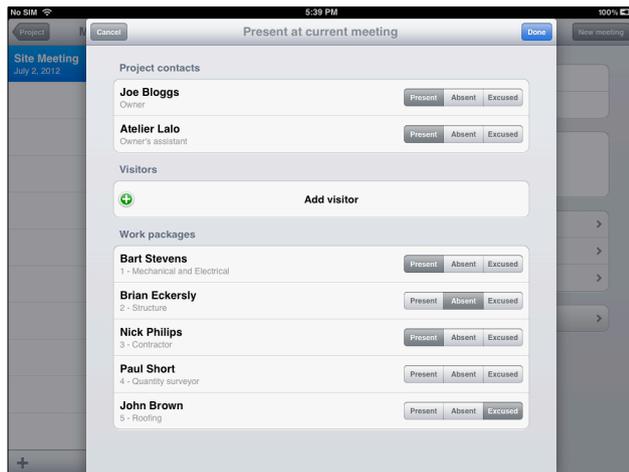
Using the three groups, you can specify who is present at the current meeting, who is absent, and who is excused.

Both absent and excused people are not present, but in some cases you might want to apply penalties to contractors or subcontractors that are too often absent without a valid excuse. Use the information gathered here to manage those penalties in your back-office accounting.

The **Project contacts** and **Work packages** groups can not be modified in this dialog. You will need to use the Project information screen and Work packages screen respectively to add or remove contacts.

Visitors

The **Visitors** group can be managed from this dialog. Add or remove any visitor as needed for the meeting.

Use the **Add visitor** button to add a new visitor from your Contacts, or create a new contact in case the visitor is not yet in your Contacts. We encourage you to enter all the information regarding visitor, and most of all their email address. This will allow Archipad to automatically set up the report send by mail to include this person, and make sure that all the meeting attendees get a copy of your report.

Note that the **Signatures** dialog, you can not add or remove visitors. The list for the Signatures dialogue is the same as the list from the Present at current meeting, and will only show the people you have defined as present.
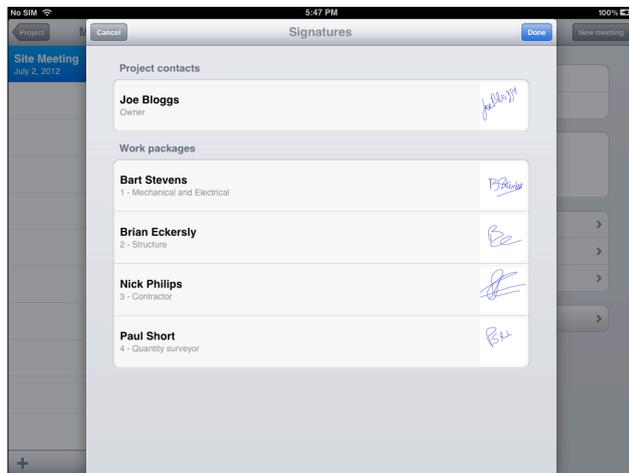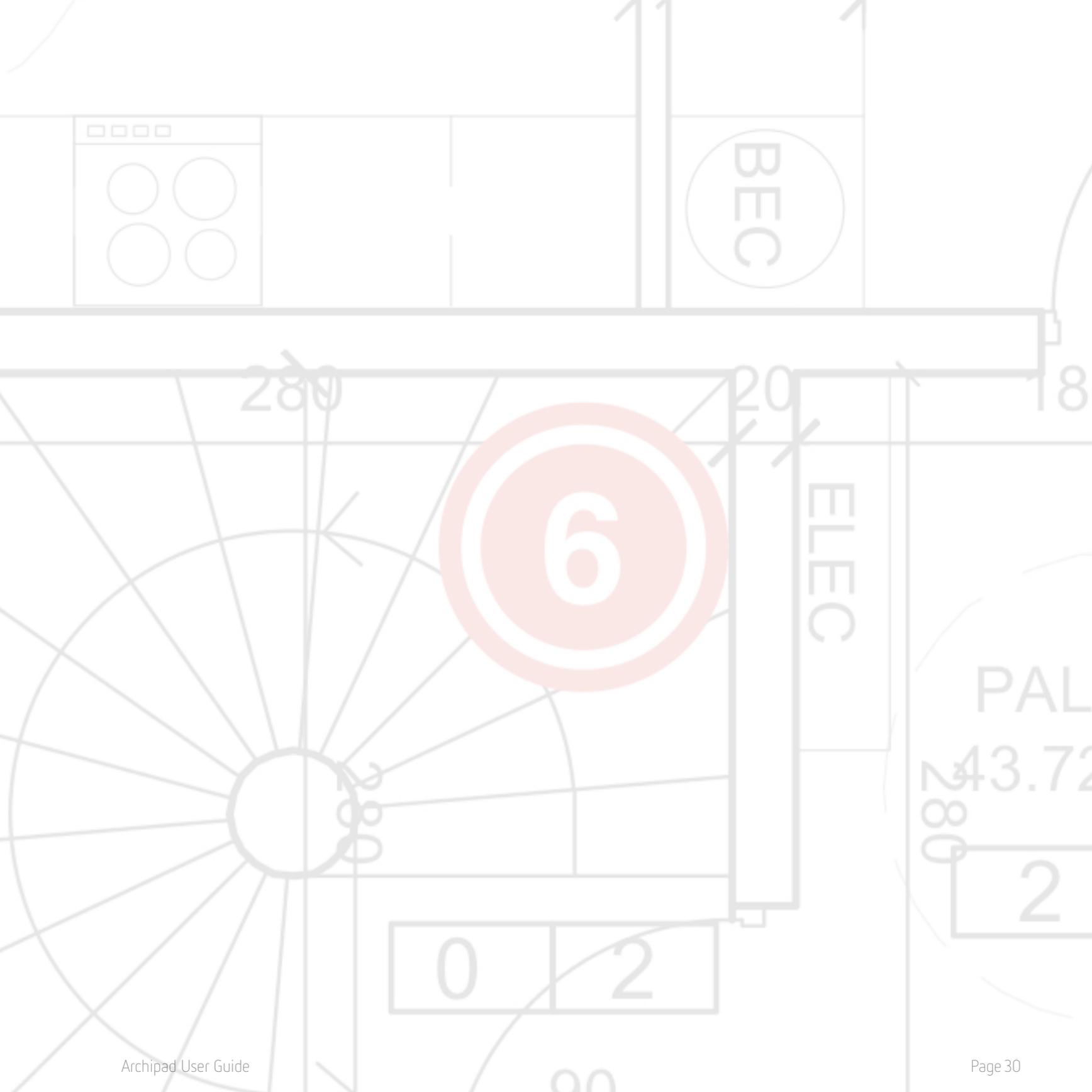
6 - Observations and punch lists

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.

What is an observation?

An observation is a description of a defect, or anything that must be taken care of, that you find during your on-site inspection. Normally you point on the drawing where you found the issue, add a description and locat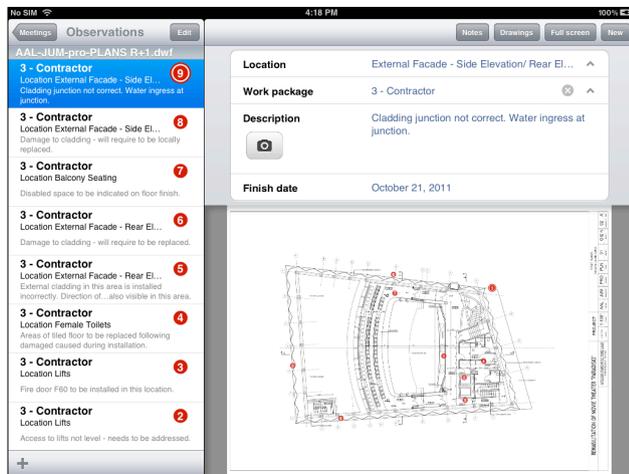ion, and the date by which issue should be solved. Optionally you can add a photo and a sketch to each observation to clarify and for tracking purposes.

Any observation you add in a meeting, can only be solved in a follow-up meeting. In other words, you must create a new meeting to mark an observation from a previous meeting as solved.

The screen is divided in three sections; the list of observations on the left, the observation description area in top right, and the drawing area in bottom right.

The list of observations displays all observations that have not yet been solved, sorted by number and grouped by drawing. When you tap on an entry, the drawing on the right will scroll the drawing if needed to show the observation's tag on the drawing with a highlighted circle.

When you scroll thru the list and select an observation from another drawing, the drawing on the right will scroll to reveal the corresponding drawing centered on the observation you just tapped.

The observation description area will show the information for each observation. It will automatically update to show the information from the selected observation, wether you selected it from the list or wether you select the observation's tag on the drawing.

> When you select an observation from a previous visit, the background of the observation in the list and in the description area is not white but light gray. This indicates that you can no longer modify or delete the observation, you can only mark it as solved.

You can pinch to zoom the drawing from small to large to best suit your needs. You can also rotate your drawing using two fingers to adapt to your physical position compared to to location on the drawing.

Adding an observation

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

You can also use the **+** button and the **New** button 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.

Deleting an observation

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

Tap the **Modify** button at the top of the list, select the observation you want to delete, then tap the **Delete** button.

Only observations added during the current visit can be removed. Observations from a previous visit are not removed but marked as solved.

When the observation was added in a previous visit, you will notice that when you try to delete that observation, it will not be removed but instead be marked as solved.

💡 You can easily spot the difference between observations added during the current visit or added in previous visits: the background color of an observation added during the current visit is white, those added during earlier visits are light gray.
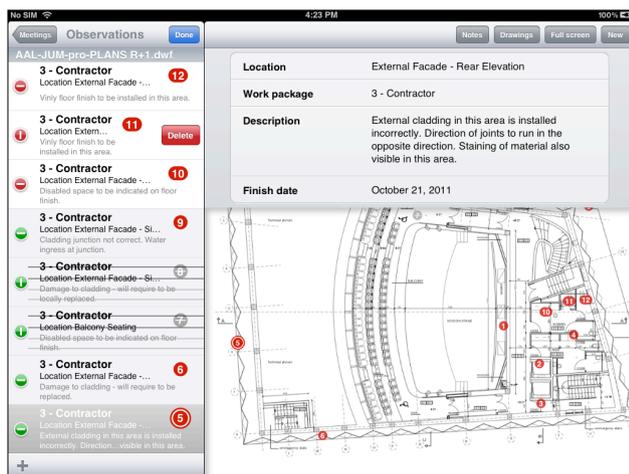
Marking observations as solved

After you have added observations, and sent out the report to the contractors and sub-contractors so they know what needs to be fixed, repaired, or otherwise taken care of, there will come a time that you will do a follow-up meeting to inspect their work.

In a follow-up meeting, you will check the work of the contractors and sub-contractors, and if it was done according to your specifications, mark the observation as solved.

You can mark an observation as solved directly from the list by swiping left or right over the observation title.

Tap the **Modify** button at the top of the list, and tap the observation to mark as solved.

The observation will show the ⊖ icon, which will mark the observation as solved when tapped. Unlike for removal, you do not have to confirm the action, as your change is not destructive and easy to revert your change.

When the observation was added in the current visit, you can not mark it as solved, the observation will be deleted instead.

> You can easily spot the difference between observations added during the current visit or added in previous visits: the background color of an observation added during the current visit is white, those added during earlier visits are light gray.

Adding photos and sketches

A picture is worth a thousands words, or at least very often it will allow you to describe with less detail and add a photo to clearly show the problem. To each observation you can add a photo, a sketch, or a photo with a sketch.

Add a photo to clarify the description of your observation, or for archiving and documenting purposes. Tap the [photo icon] photo icon in the description area to open the camera.
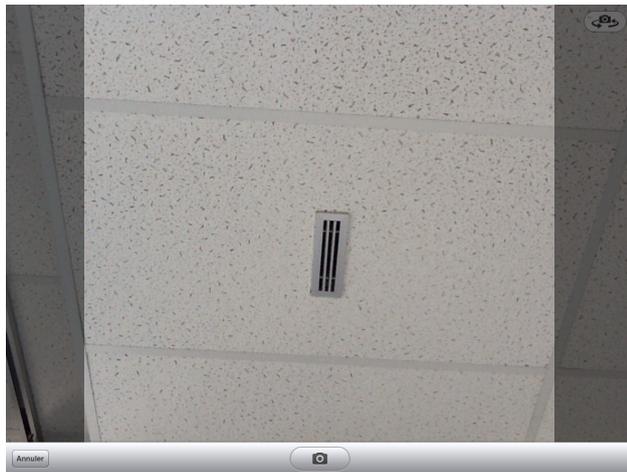
Note that in either orientation, landscape or portrait, your photo is always square. For this reason you see two blacked-out areas on either side of the photo, to clearly mark which area is included in your photo.

Take your photo and you will be able to add a sketch on your drawing, typically to indicate the location you want to focus on.

Once you added a photo or a sketch to an observation, you will see a thumbnail of the photo or sketch instead of the camera button. This allows you to quickly see which observations have extra information attached.
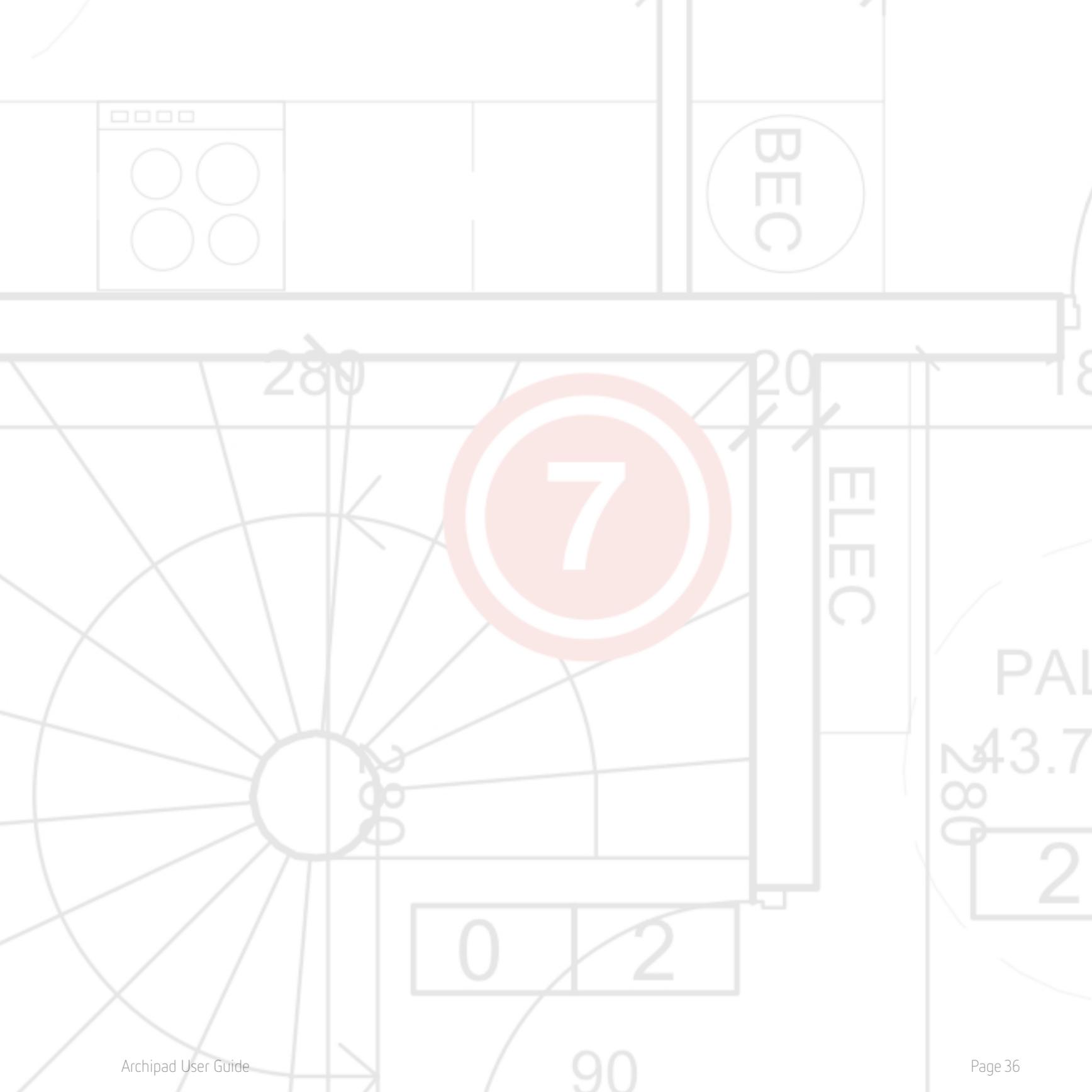
7 - Generate and sharing reports

Once you have added all your observations, you will want to send out a report to the contractors, sub-contractors, and other project contacts.

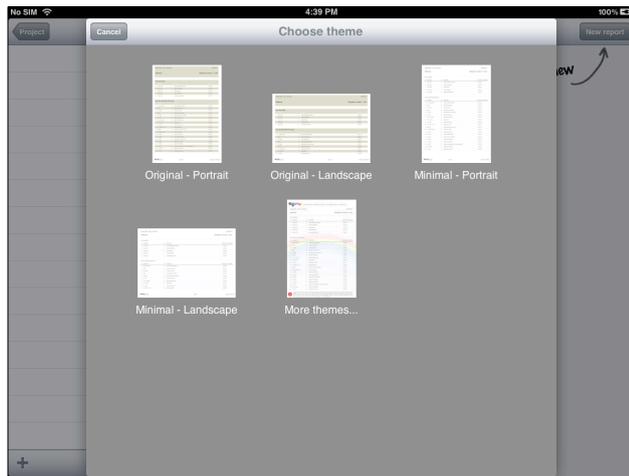Navigate to the Reports section, and tap the **New report** button. This will open a dialog where you can enter all the information needed to create your report,using the data and layout that best fits your needs.

Start by selecting the layout for the report you want to generate. Initially you can choose from 4 different layouts, and using Archiweb you can create your own.

> 💡 Personalize your reports using Archiweb. Create your free account on Archiweb, and upload a PDF file that contains your company logo, header, and footer. This document can then be used to generate your reports when you select the Archiweb icon in this list.

Select the layout of your document by tapping the corresponding icon and specify the information that should be included in your report, and how it should be presented.
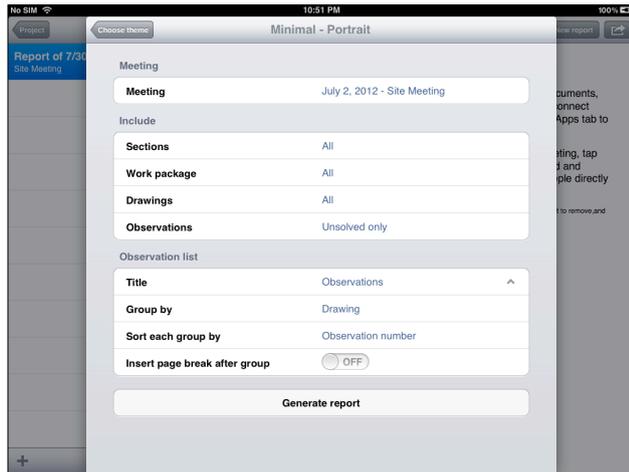
From this dialog you start by selecting the visit. All the information for the contacts marked as present or absent, convened, and their signature will be used from the selected visit. Notes are also printed as they were entered during the selected visit.

Selecting the information to include in your report

Use the Sections option to select which sections to include in your report, and define the order in which the sections are to appear.

For each section set the switch to include or ommit that section from your report.

Arrange the order in which each section appears in your report by dragging the section to its desired position in the list.

You can decide to limit your report to only contain observations relative to certain work packages. Only those work packages showing a ✔ will be included in your report.

Even when you select all or just some drawings to be included in your report, only those drawings that actually contain observations will be included in your report.

By default all the drawings that contain observations are included in your report. But you can restrict this to only a selected number of drawings. Only drawings in the list showing a ✔ will be included.

Even when you select all or just some drawings to be included in your report, only those drawings that actually contain observations will be included in your report.

Most likely you will only include the unsolved observations in your report, if you would like to view also all the observations that you marked as solved, change this setting to the **All** option. You can also limit the observations to include in your report to those that were added or marked as solved during the selected visit.

The last group of options, the Observation list, is where you specify the name for the observations page, how to group and order the observations, and if each of these groups should start on a new page.

You might want to use some other title for the list of observations, such as remarks, defects, or any other title that you want. The popup will remember each new title you entered, and allow you to select it from the popup the next time you create a new report.

Depending on how you group the observations, you can sort each group using different criteria. The two groups and sort combinations you most likely will use are group by drawing / sort by observation, and group by work package / sort by drawing.

When you prepare your report for the different contractors and subcontractors, you could insert a page break and group by work packages, like this each contractor will get the observations that concern them at the start of a new page, easy for you to hand out in case you print them.

Once all these settings are defined, Archipad will remember them for your next report.

Tap the Generate button, verify the result to make sure you included the data you wanted, and you will be are to send or print your report.

Sharing your report

Now that you have created your report, you will send it to the contractors and subcontractors that will work on the observations you assigned to them.

There are several ways of doing this, the quickest being to email the report. If you have an AirPrint capable printer with you on site, you could also print your report and hand out copies. When you connect your iPad to your computer, you can also send the report to iTunes, and from there copy the file to any location you want, such as your back-office, your file-vault, etc..

When you send the report by mail, you will be presented with the list of all the contacts from this visit already entered, and those that were marked as present or convened for the next meeting selected.
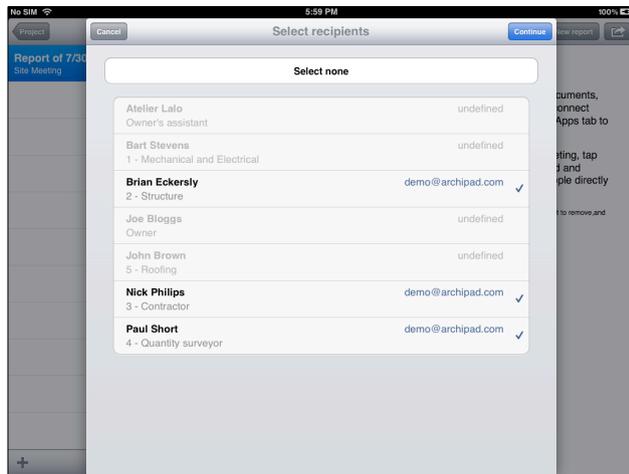
You can change this selection by tapping each item. When you have set up the list, tap Continue, and you will be presented with the actual mail window containing the message and the files to include, i.e. the report and the drawings. The subject of the mail is set to the title of the report as you entered it in the meeting title in the site meeting screen.
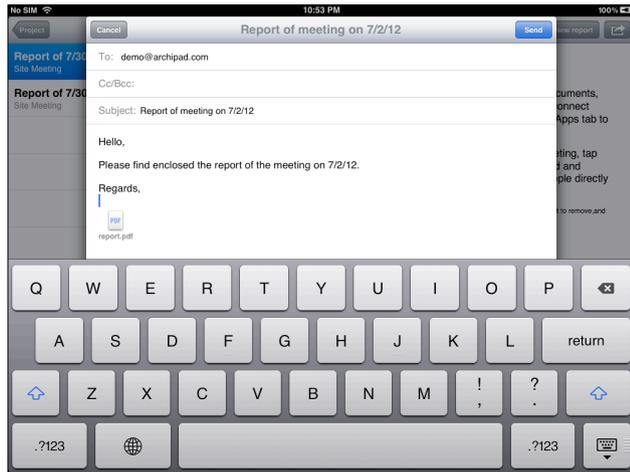
Change the text of the mail to send, and add any recipients that need to receive a copy of the report. You can also remove any of the attached documents by selecting the document an tapping the ✖ delete key.
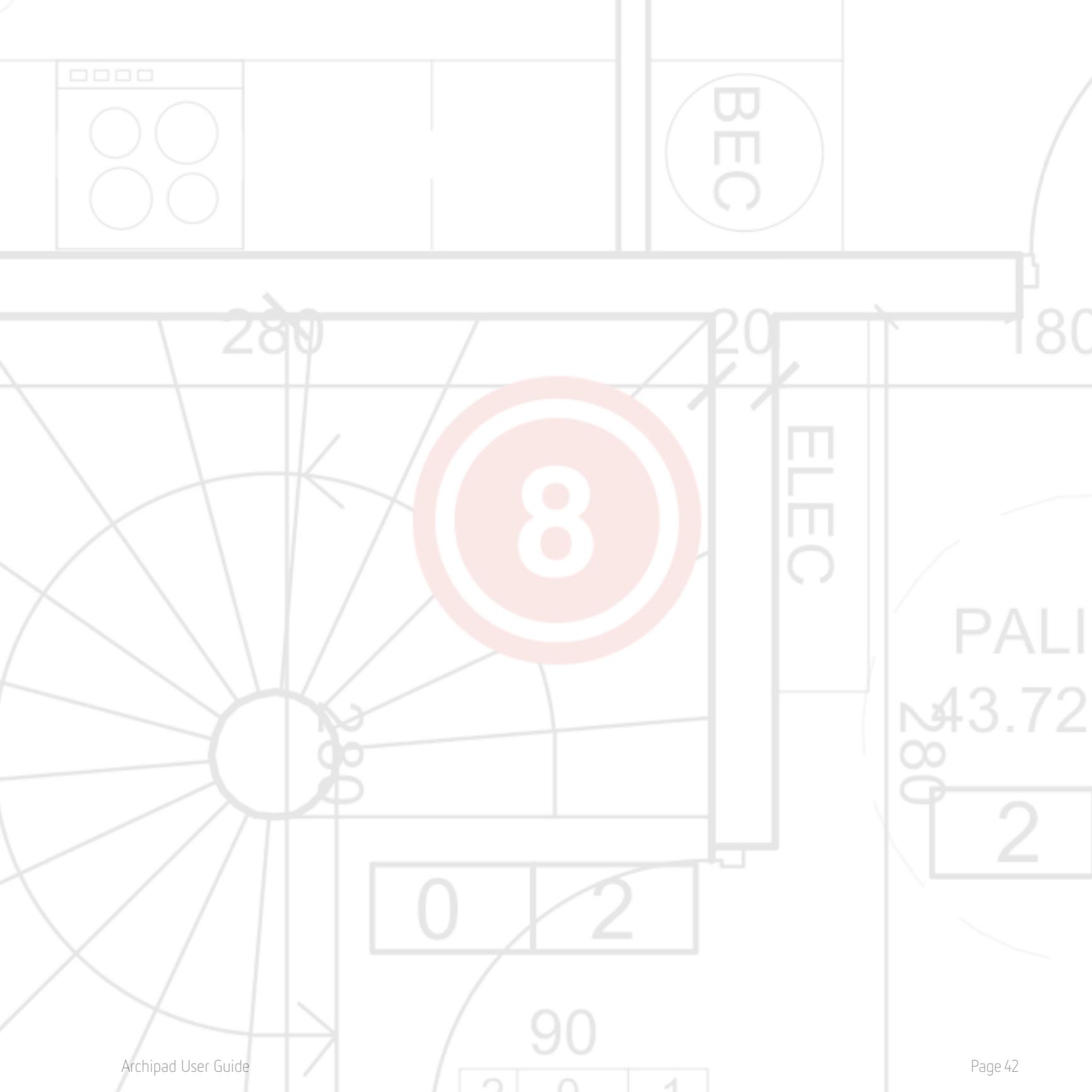
8 - Frequently asked questions

Are updates to Archipad for free in the AppStore?

Yes.

Is there like a monthly fee or recurring payment for Archipad?

No.

Are there no recurring fees at all?

Only when you want to use more Archiweb features than we currently offer for free. We give you for free: one synchronized project for continuous back-up, 100MB of storage for your drawings and photos, and two iPads to synchronize. When you need more, you can purchase extensions directly on Archiweb.

What is the recommended work method?

In the office, set up your project, define the work packages, and import the drawings. Share the resulting project to Archiweb.

At the construction site, start a new meeting. Open the drawing and add observations as you go by tapping on the drawing at the location you've spotted a defect or anything that needs taken care of. Add photos and sketches to clarify defects when needed. Every so often, and at least once at the end of a site meeting, synchronize your changes back to the Archiweb server. Synchronizing often will minimize the amount of work lost in case your loose your iPad.

Can we create default texts to standardize descriptions?

Any description you enter will be proposed the next time you create an observation for the same work package. This greatly reduces the amount you need to type, and helps standardize your descriptions.

Can I add a photo or sketch to an observation?

Yes, just tap the [📷] button when you create your observation, and take a photo or add a sketch.

How do I add a comment, photo, or finish date to an observation?

When you create a new observation, these fields are automatically ready for you to provide data. At a later time you can always return to the observation and provide more detail if needed.

How do I view the description of an observation?

Tap on the observation's red dot on the drawing, or
Tap the observation in the list on the left.

How do I send my punch list?

Generate your report as needed, then tap the Share button. A mail will be prepared ready to send to all the participants of the meeting, including the PDF report, the Excel document, and the drawings with the red dots as PDF documents.

Is it possible to define a color to each work package's observation?

Not yet, but this feature will be available in a future release.

How do you open a different project?

To change projects, return to the project selector. Select an existing project, or import a project from Archiweb or iTunes, or create a new project.

Is it possible to define users?

For now it is not possible to create users, but we are working on this. Using Archiweb, it is already create accounts, and soon it will be possible to define users and assign users projects, roles, and priviliges.

Is it possible to move an observation?

Yes, simply tap and hold the observation to move, and reposition the observation to the desired location.