

# Survey and installation record tasks

The survey task allows the surveyor to enter all information required to plan out the installation in one location. Surveyors can answer the questions and add additional comments. Information is pulled through from the survey to a scaffolding request form which you can also access from the **Forms** drop-down.

The installation record works in many of the same ways as the survey task, it instead allows you to keep a good record of your install should any issues arise in the future.

In both forms you can upload images and apply image annotations. A PDF report of the survey and installation record can be generated from the reports drop-down in the main navigation.

## Accessing the survey and installation record

From any project, click the **Tasks** option in the main navigation menu, then select **Surveys** or **Installation record**.

### Filling out

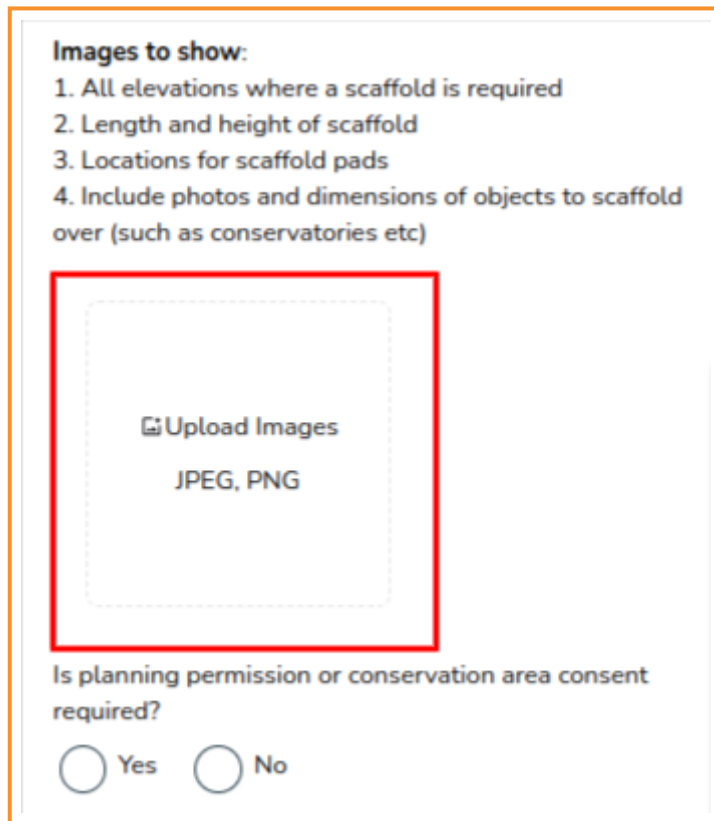
Both forms are divided into sections that can be viewed and navigated between using the right-hand menu.

The image shows two side-by-side screenshots of the application interface, each representing a different task form. Both forms have a top navigation bar with a back arrow and the text 'Project Overview'. The left form is titled 'Solar Survey' and features a list of sections on the right side, with 'Access and safety' highlighted. The right form is titled 'Installation record' and features a list of sections on the right side, with 'Roofs' highlighted.

Form	Section	
Solar Survey	Access and safety	
	Roofs	
	Loft access	
	Existing electrics	
	PV inverter	
	Battery system	
	Communication cables and connectivity	
	Consumption	
	Additional comments and images	
	Installation record	Roofs
Inverters		
Electrical		
Monitoring system		
Further information		


### Uploading an image

There are various places throughout the survey and installation record where pictures can be uploaded and annotated. Click on the **Upload Images** box and it will bring up the option to upload a picture from your files. If you are on a mobile or tablet device it will give you the option to take a photo. You can repeat this step to add multiple images.



**Images to show:**

1. All elevations where a scaffold is required
2. Length and height of scaffold
3. Locations for scaffold pads
4. Include photos and dimensions of objects to scaffold over (such as conservatories etc)

 Upload Images  
JPEG, PNG

Is planning permission or conservation area consent required?

☐ Yes ☐ No

Note that .heic files (usually from mobile devices) are not supported at this time. If your phone, tablet, or camera is set to save pictures in this file format, please change this to save .jpg files in settings.

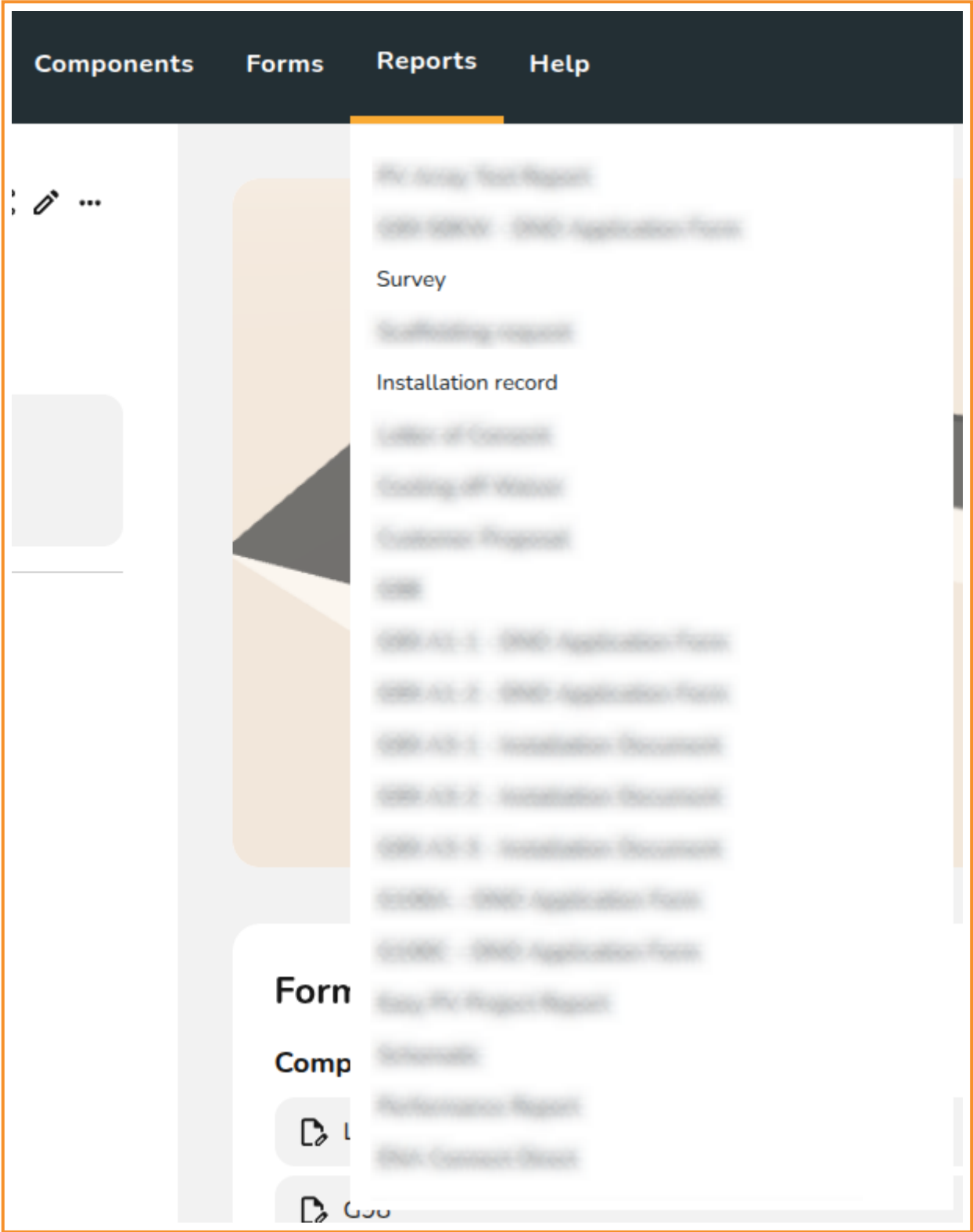
## Adding annotations to your images

Once the file has been uploaded, you can **click on the picture to bring up the annotation options**.

- Use the bin button to delete annotations or the whole image.
- The cursor lets you select annotations you have added to the image.
- The pencil allows you to draw or write free-form.
- The 'T' is used to create a text box.
- The arrow lets you draw an arrow.
- The colour box is where you can change the colour of annotations.
- The tick mark saves your annotations and exits the annotations editor.

## Accessing your survey and installation record as a PDF report

After the form is complete, the report can be found in the **Reports** drop-down.



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