

Pro: Survey and installation record tasks

This guide applies to **pro** versions of Easy PV. [Read more](#) about what you gain with pro.

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 and filling out the survey and installation record

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

Filling in survey and installation record

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

← Project Overview

Solar Survey

Access and safety

Roofs

Loft access

Existing electrics

PV inverter

Battery system

Communication cables and connectivity

Consumption

Additional comments and images

← Project Overview

Installation record

Roofs

Inverters

Electrical

Monitoring system

Further information


On the left, for each section you'll see each question to answer:

Access and safety

Is there adequate parking for contractors on site or nearby?
Are there any parking restrictions?

Park in front of house, no parking restrictions.

Images showing parking arrangements and main door entrance



Upload Images
JPEG, PNG

How many elevations of scaffolding will be required?

2

For each elevation that requires scaffolding, please give a description of its location, length and height.

Scaffolding at front of house.
6m long, 5m high.

Are there any obstacles to be considered when erecting scaffolding?

Yes No


If you think an important question is missing from the survey or installation records, get in touch at help@easy-pv.co.uk.

Uploading and annotating 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.

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

 found or type unknown

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.

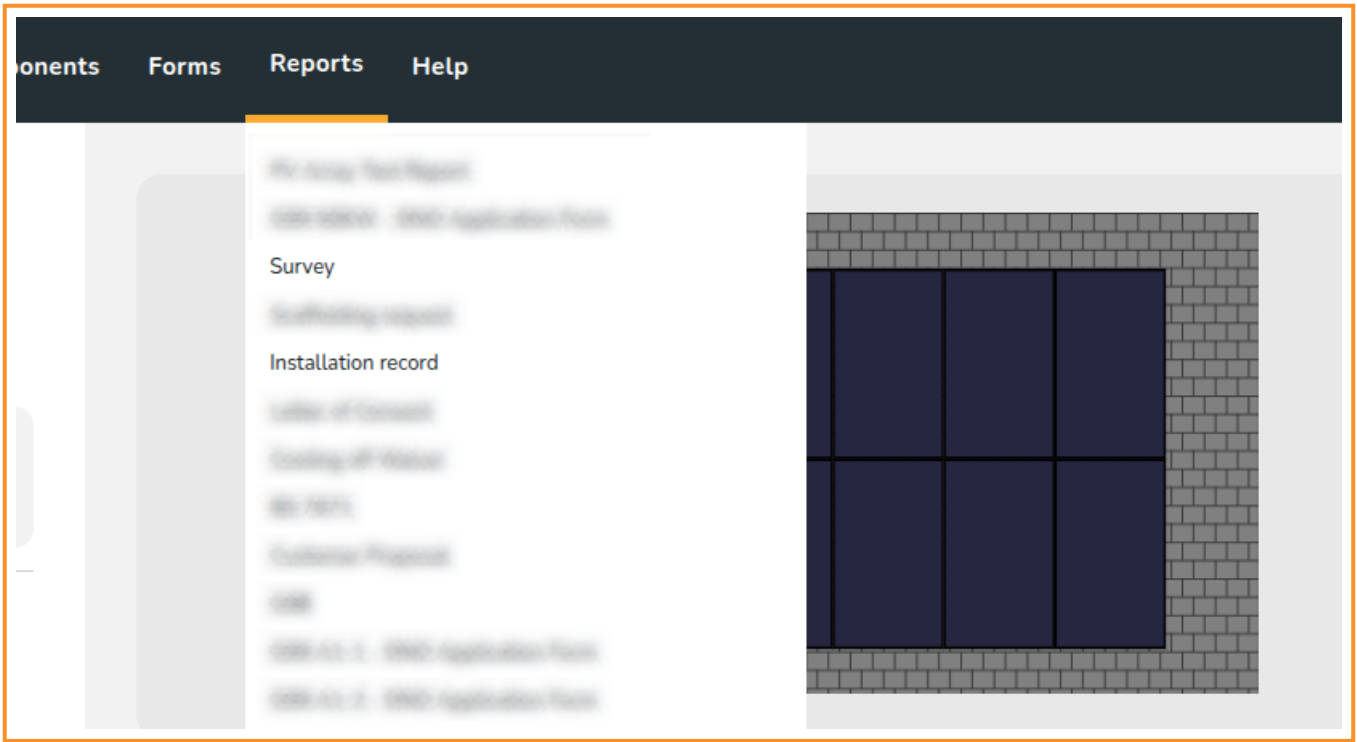
The **colour** box is where you can change the colour of annotations.

The **tick mark** saves your annotations and exits the annotations editor.

The green bar at the left indicates which tool you are currently using.

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.



You can then scroll through the document with all your inputs, save as a PDF or save to your project's document storage

