User guide
QA-Online

Everything you need to work in the system, step by step.

November 2026

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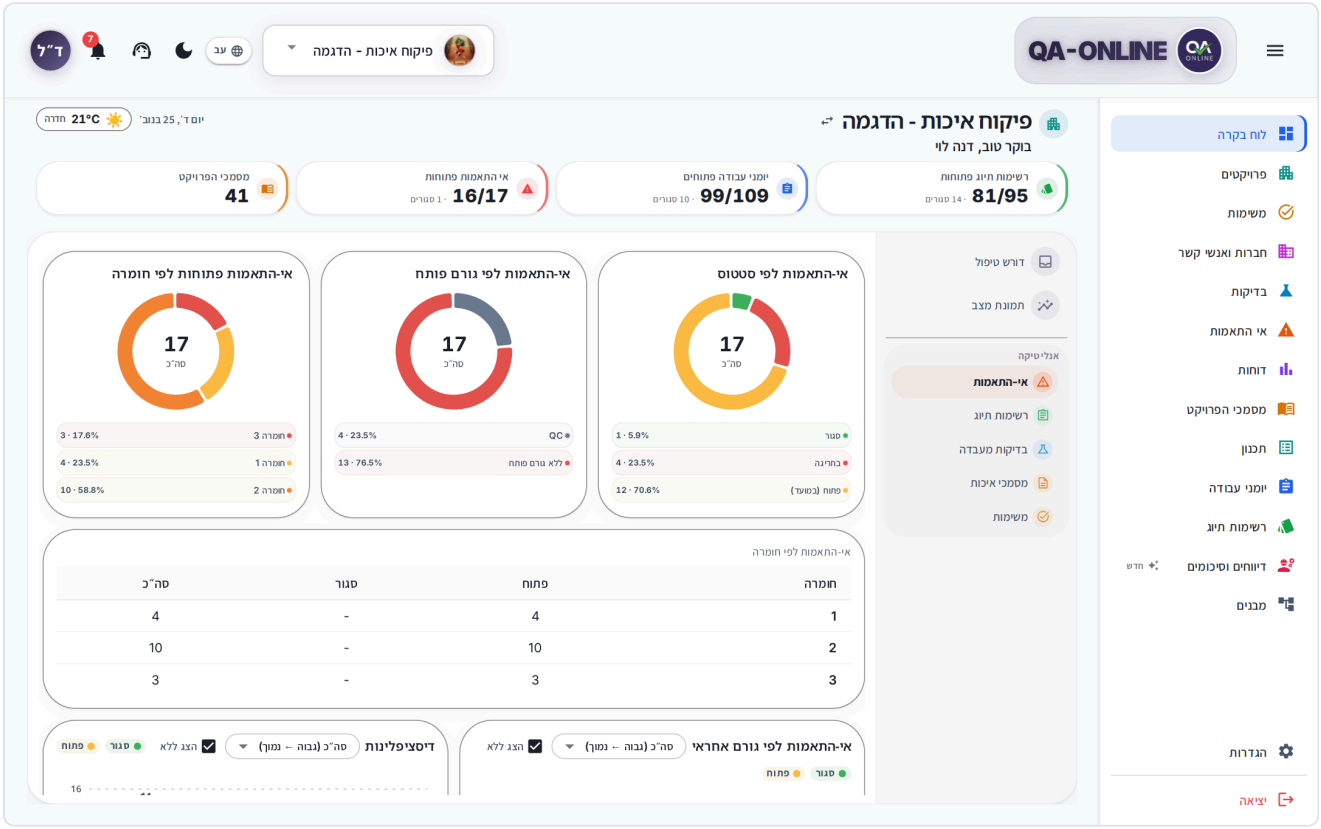
Getting started

Welcome to QA-Online

Get to know the system, see what you can do in it, and find the path through this guide that fits your role.

QA-Online is a quality and project management system for construction. Your whole team – in the field and in the office – works on the same data: checklists, non-conformances, lab and survey tests, work logs, documents, plans, and tasks. Every item is saved in a project, with its location, photos, signatures, and full history.

QA-Online runs in a browser on a computer, tablet, or phone. On your phone you can also use the QA-Online app from Google Play or the App Store – see Using QA-Online on a phone or tablet.



The Dashboard of a sample project

What you can do in QA-Online

The modules are listed here in the same order as in the side menu.

Module	In brief
Dashboard	A snapshot of the project and what's waiting for you
Projects	All your projects, and how to switch between them

Module	In brief
Tasks	Everything that needs your attention – approvals, signatures, and tasks
Companies and contacts	Everyone involved in the project, with their contact details
Tests	Lab orders and survey orders, and their results
Non-conformances	Record defects, assign them to a responsible party, and track them through to closure
Reports	Ready-made reports for analysis and sharing
Project documents	The project's quality documents in one place
Design	Plans and drawings – view and mark up
Work logs	A daily record of the work on site
Checklists	Step-by-step quality control, with signatures and reports
Field reports	Field reports, site-visit summaries, and meeting minutes
Structures	The project's structure: subprojects, structures, and elements

> **Don't see this option?** Not every user sees every module and action. Permissions are set by your role in the project. If a module or button is missing, contact your project manager or your organization's system administrator.

Where to start

If this is your first time, start with Quick start. In five minutes you'll sign in, choose a project, and complete your first action.

Then pick the path that fits your role:

Field inspectors and site managers

1. Getting to know the screen and navigation
2. Checklists – fill in and sign steps
3. Non-conformances – open a defect with a photo and location
4. Work logs
5. Common tools – location, photos, and voice typing
6. Using QA-Online on a phone or tablet

Quality managers

1. Tasks and approvals
2. Checklists, Non-conformances, and Tests
3. Project documents and Field reports
4. Reports

Project managers

1. Dashboard and projects
2. Tasks and approvals
3. Reports and Design
4. Companies and contacts

Labs and surveyors

1. Tasks and approvals
2. Tests

Organization administrators

1. For organization administrators
2. Settings

How this guide is organized

Each chapter opens with a single sentence explaining what the module is for. Short, task-based instructions follow – "How to create…", "How to approve…" – in numbered steps.

A few conventions:

- **Bold text** is the name of a button, tab, or field, exactly as it appears on screen.
- Callout boxes look like this:

> **Tip:** A faster or easier way to do something.

> **Note:** An action that's hard to undo, or a situation worth knowing about in advance.

> **Don't see this option?** What to do when a button or module is missing because of permissions.

- This guide follows the English interface. Bold text matches the label on screen. If QA-Online is shown in another language, switch it in Settings. Screenshots are from a sample project and may still show the Hebrew interface.

What you need

- **A current browser** on a computer, tablet, or phone – or the QA-Online app on your phone.
- **Username and password** – you get these from your organization. Don't have an account? See How to request access.
- **Project assignment** – after you sign in, you'll see only the projects you've been assigned to.
- **A saved signature** – required to sign steps and rows in documents. Users don't upload their own signature – see Settings.

Need help?

- Use the guide's search bar, or browse the FAQ.
- Not sure what a term means? See the Glossary.
- Can't find an answer? Open a support ticket right from within the system.

See also

- Quick start – your first five actions in the system.
- Getting to know the screen and navigation – the side menu, the project selector, and lists.
- FAQ and troubleshooting – quick answers to common problems.

Getting started

Quick start – 5 minutes

Five short actions that take you from your first sign-in to real work in the system.

If this is your first time in QA-Online, go through this chapter from start to finish. Each step links to the full chapter in case you want more detail.



The QA-Online sign-in screen

Step 1: Sign in

1. In your browser, open the system address you got from your organization, or open the QA-Online app on your phone.
2. Enter your **Username** (or email) and **Password**, then click **Sign In**.
3. If a code is sent to you by SMS, enter the 6 digits.
4. If you signed in with a temporary password, choose a new password and click **Change Password**.
5. The first time you sign in, accept the **Terms of use**.

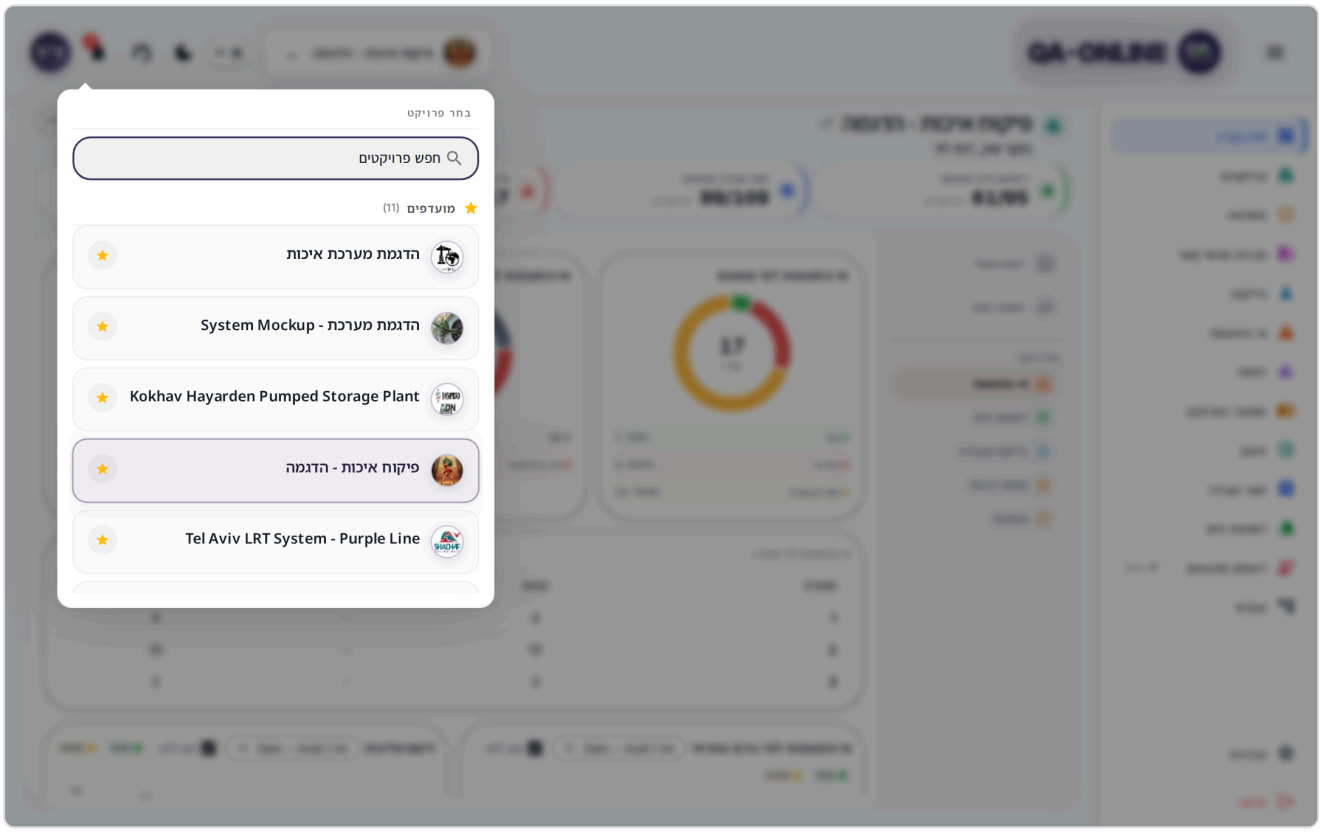
> **Tip:** Forgot your password? Click **Forgot Password?** on the sign-in screen, and you'll get a temporary password by email. For the full details, see Sign-in and account.

Step 2: Choose a project

Almost everything you see in the system belongs to one project, so you start by choosing it.

1. Click the project name in the top header (the project selector).
2. Type part of the project name in the **Search projects** box.
3. Click the project. You'll go to its **Dashboard**.

> **Tip:** Working on several projects? Star the ones you use most. They appear first in the selector, under **Favorites**.



The project selector open in the top header

Step 3: Get to know the screen

- **Side menu** – all the modules, in order: **Dashboard**, **Projects**, **Tasks**, **Companies & Contacts**, **Tests**, **Non Conformances**, and more. Modules you don't have permission for don't appear.
- **Top header** – the project selector, **Notifications**, **Support Center**, and the user menu.
- **Dashboard** – key metrics, what needs your attention, and what you opened recently.

For the full details, see Getting to know the screen and navigation and Dashboard and projects.

Step 4: Handle what's waiting for you

1. In the side menu, click **Tasks**. Make sure **Incoming** and **Active** are selected.

2. Click the task title. The document opens right at your step.
3. Approve, sign, or send it back for correction, as needed.
4. If the task doesn't close on its own, go back to the **Tasks** screen and click **Done**.

No tasks? You'll see the message **All clear for now**. For the full details, see Tasks and approvals.

Step 5: Create your first item

In this example, you'll open a non-conformance with a photo. All modules work in a similar way.

1. In the side menu, click **Non Conformances**.
2. Click **+** at the top of the screen (on a phone, use the floating button in the corner of the screen).
3. Fill in the required fields, marked with an asterisk, and choose the location on site.
4. Click **Save**.
5. In the **Non-conformance created successfully!** message, click **Go to non-conformance**.
6. In the **File list** section, click **Add files**, attach a photo, and click **Upload**.

That's it. The responsible party can now handle the non-conformance, and you can track it through to closure. For the full details, see Non-conformances.

> **Important:** Before you create or save anything, check the project name in the header. Items are always saved in the active project.

See also

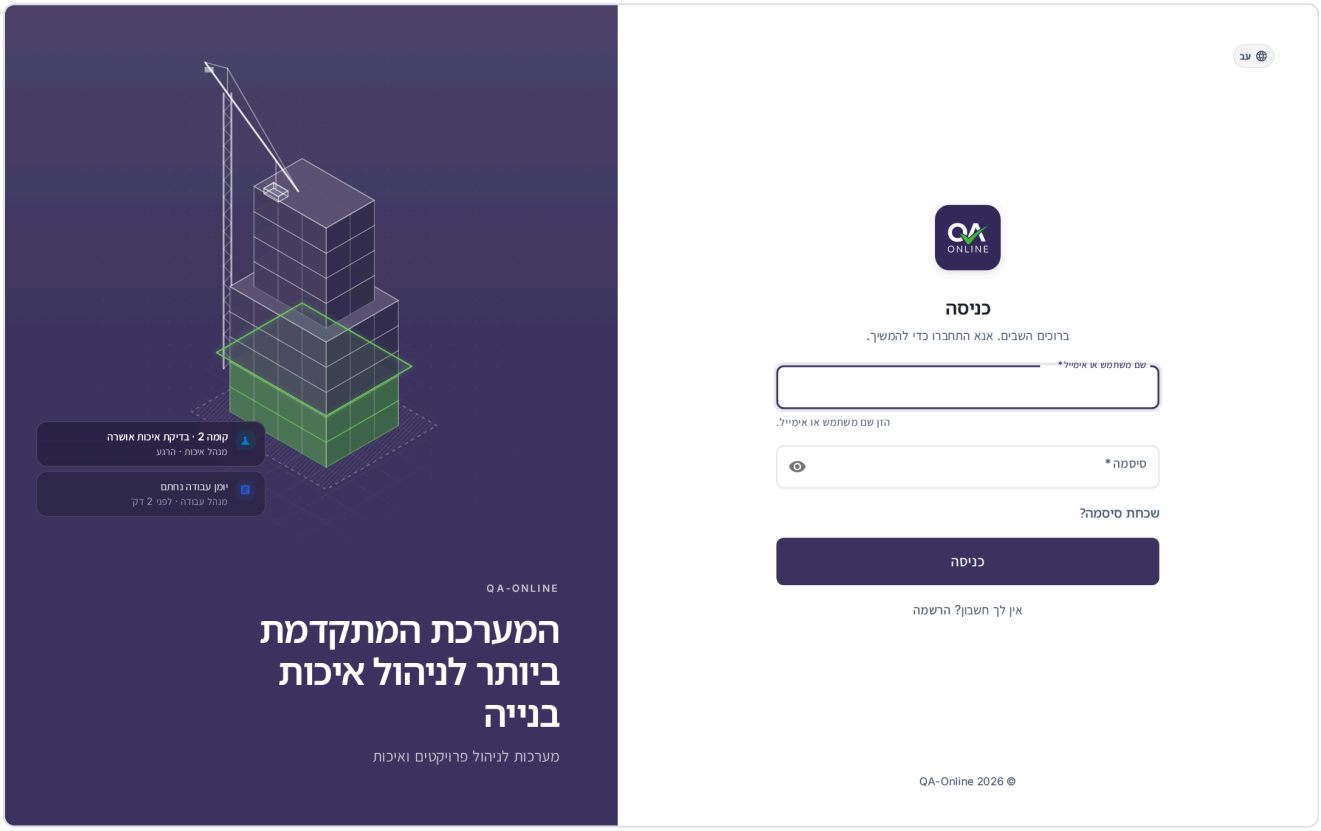
- Welcome – the path through the guide that fits your role.
- Settings – language, dark mode, and the order of the side menu.
- Using QA-Online on a phone or tablet – working from the field, including the app.
- Support and help – for when a signature is missing or something isn't working.

Getting started

Sign-in and account

Sign in to QA-Online securely, verify with SMS, manage your password, and sign out.

This chapter covers everything that happens before you reach the Dashboard: signing in with a username and password, the SMS verification code, temporary and forgotten passwords, requesting access as a new user, accepting the terms of use, and what happens when your connection or session is interrupted.



The sign-in screen with username and password fields

How to sign in

1. Open the QA-Online address in your browser, or open the QA-Online app on your phone.
2. In the **Username** field, enter the username you were given or your email address.
3. In the **Password** field, enter your password.
4. Click **Sign In**.

If your account is protected with two-step verification, the **Verify your identity** screen appears (see below). Otherwise, you go straight to the Dashboard.

> **Tip:** To see what you typed in the password field, click the eye icon at the edge of the field.

> **Tip:** The system remembers the last username that signed in on your device and fills it in for you.

> **Tip:** If you opened a direct link to an item (for example, from an email or WhatsApp) before you signed in, you'll go straight to that item after you sign in.

Change the language on the sign-in screen

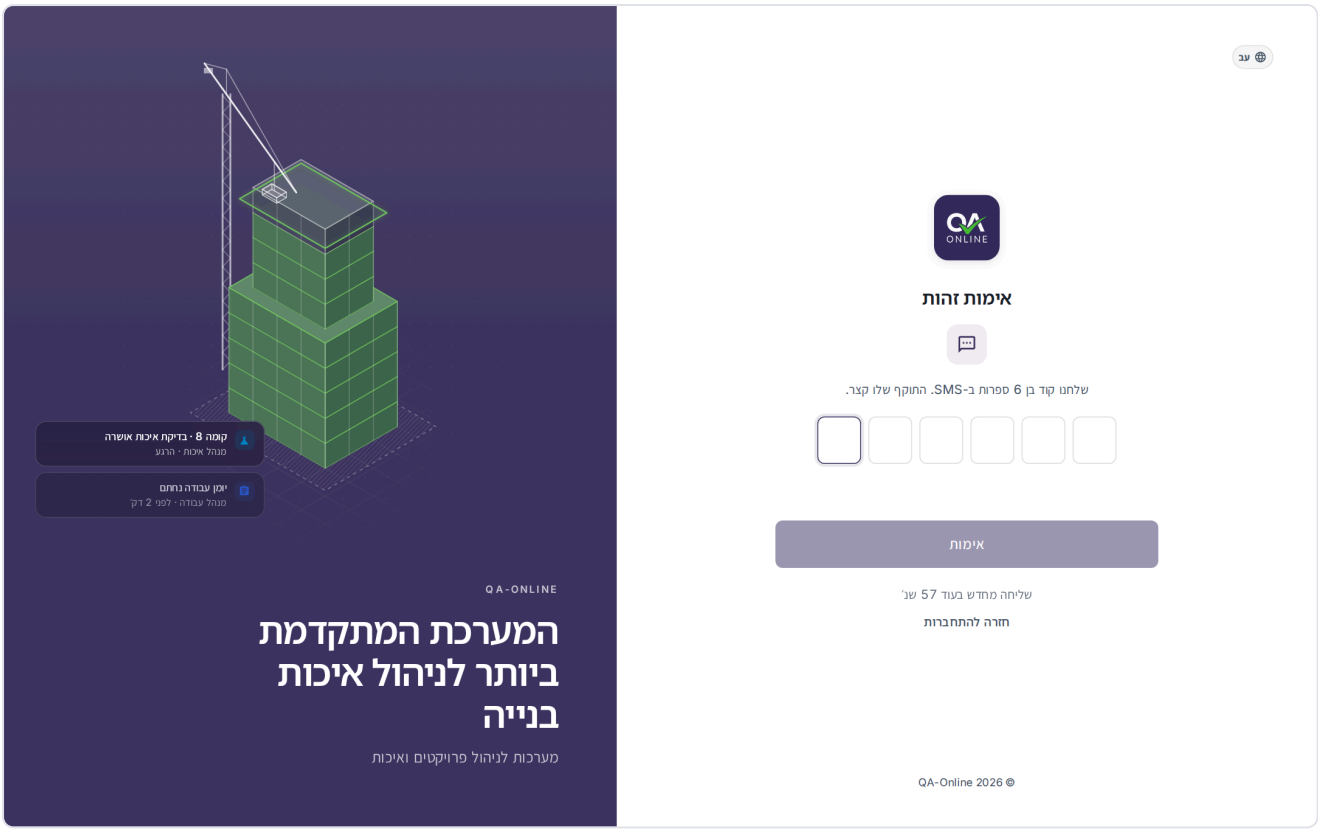
At the top corner of the sign-in screen there's a language selector. Choose Hebrew (עברית), English, Arabic (العربية), Spanish (Español), or Russian (Русский). The system remembers your choice for next time.

Common sign-in error messages

Message	What to do
Invalid username or password	Check your keyboard language and Caps Lock. If you forgot your password, see How to reset a forgotten password.
Username must be at least 3 characters long	Complete the username.
Password must be at least 6 characters long	The password you entered is too short.
Connection issue. Please try again. or **Network error. Please try again**	Check your internet connection and try again.

How to verify your sign-in with an SMS code

For accounts with two-step verification, a 6-digit code is sent to your phone after you enter your password.



The Verify your identity screen with six boxes for the code

1. On the **Verify your identity** screen, enter the 6 digits from the SMS message.
2. Once all 6 digits are filled in, the code is checked automatically. You can also click **Verify**.
3. If the code is correct, you go to the Dashboard.

> **Tip:** On a phone, the code is suggested above the keyboard or filled in automatically from the SMS. You don't need to copy it by hand.

> **Note:** The code expires quickly. If a long time has passed since you received it, request a new one.

Didn't get a code?

1. Wait for the **Resend in …s** countdown to finish (one minute).
2. Click **Resend code**. A new code is sent by SMS.
3. Enter the latest code you received.

If you reached this screen by mistake, or you want to sign in with a different user, click **Back to sign in**.

Incorrect code and temporary lock

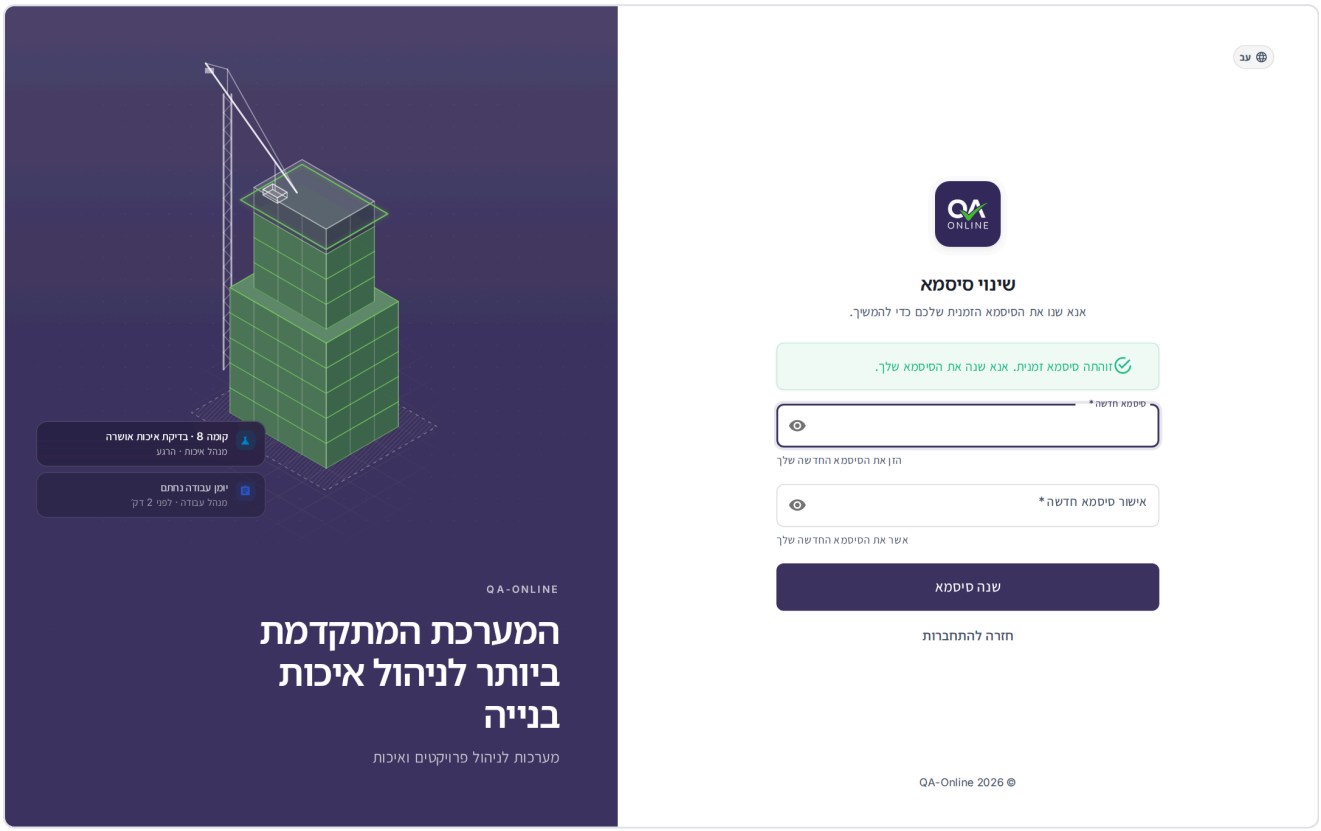
- After an incorrect code, you'll see **That code is incorrect or expired.** and, below it, the number of attempts left (for example, **2 attempts left**).
- After 3 incorrect codes, the screen is locked for 5 minutes. You'll see **Too many incorrect codes** with a countdown (**Try again in 4:59**), and the button shows **Temporarily locked**.

- While the screen is locked, you can't request a new code (**Resend unavailable while locked**). When the countdown ends, you can try again.

> **Not getting any SMS?** The phone number on file in the system is probably incorrect. Contact your organization's system administrator to update it.

How to change a temporary password

You get a temporary password when a system administrator creates a new account for you, or by email after a password reset. When you sign in with a temporary password, the system requires you to choose a permanent one before you continue.



The Change Password card after signing in with a temporary password

1. Sign in as usual with your username and the temporary password. If an SMS code is required, enter it.
2. You'll see the message **Temporary password detected. Please change your password.** and the **Change Password** card.
3. In the **New Password** field, enter a new password – at least 6 characters.
4. In the **Confirm New Password** field, type it again exactly.
5. Click **Change Password**.
6. You'll see the message **Password changed successfully! Redirecting to dashboard...** and the system signs you in with your new password.

If your account is protected with two-step verification, a new SMS code is sent after you change your password. Enter it to complete sign-in.

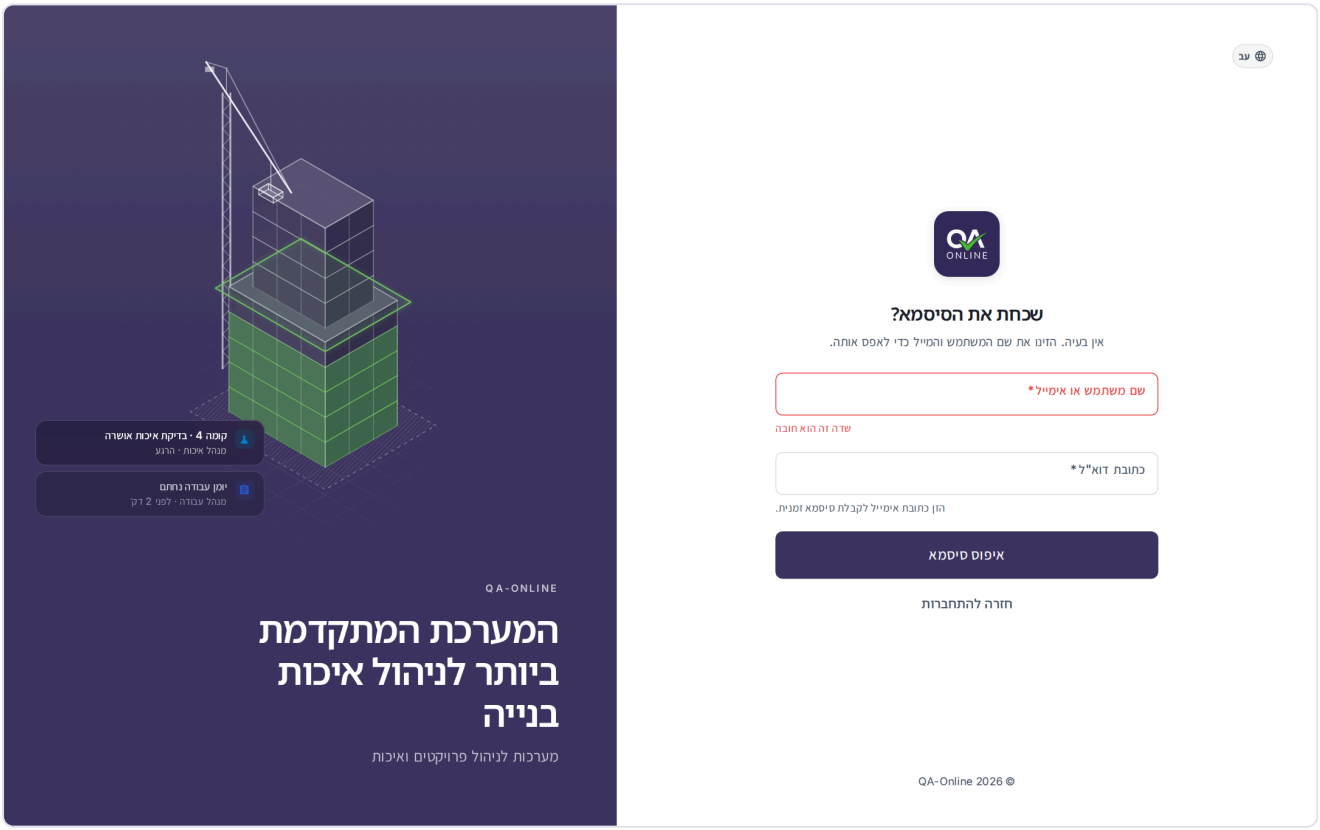
> **Tip:** Choose a long password that combines letters, numbers, and symbols. Don't reuse a password from other systems.

> **Note:** After you change your password, you'll get a confirmation email. If you get one without having changed your password, contact your system administrator right away.

- If you see **Passwords do not match**, type the same password again in both fields.
- If you see **Password changed successfully, but automatic login failed. Please login manually.**, your new password has already been saved. After a few seconds you'll return to the sign-in screen. Sign in with your new password.

How to reset a forgotten password

Resetting your password sends you a **temporary password** by email. You sign in with it and immediately choose a new password.



The Forgot Your Password card with username and email

1. On the sign-in screen, click **Forgot Password?**.
2. On the **Forgot Your Password?** card, in the **Username** field, enter your username.
3. In the **Email Address** field, enter the email address saved on your account.

4. Click **Reset Password**.
5. A success message appears, and after a few seconds you return to the sign-in screen.
6. Open the email and copy the temporary password.
7. Sign in with your username and the temporary password.
8. Choose a new password, as described in How to change a temporary password.

> **Note:** The success message currently reads **A password reset link has been sent to your email.** In practice, the email contains a temporary password, not a link.

> **Note:** The username and email must belong to the same account. If you see **The details you entered don't match. Please check your username and email and try again.**, check both. Not sure which email is on file? Contact your organization's system administrator.

> **Tip:** Can't find the email? Check your junk (spam) folder.

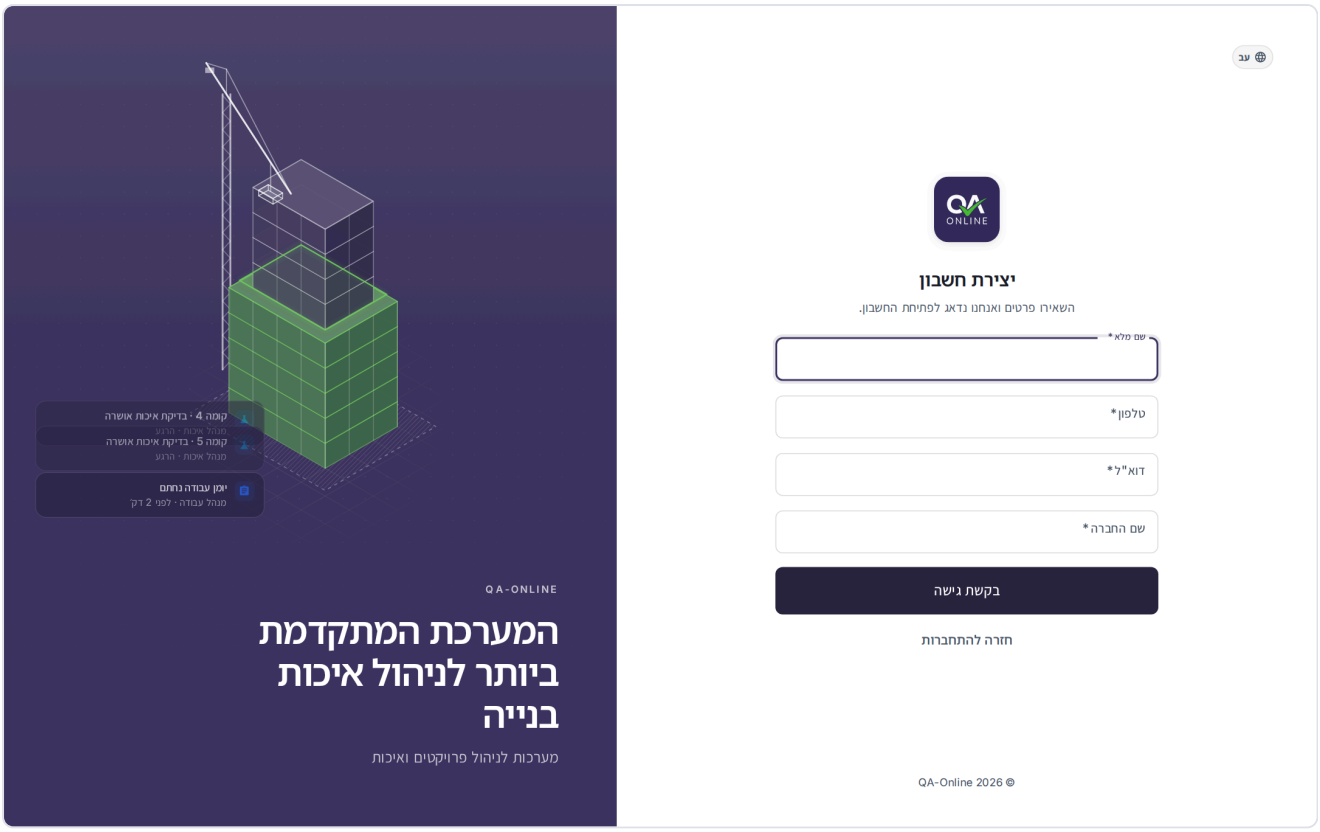
To go back to the sign-in screen without resetting, click **Back to Login**.

How to change your password while signed in

There's no screen for changing a password while you're signed in. To set a new password, sign out and use password reset, or ask your organization's system administrator to reset it for you. See also Settings.

How to request access

Users don't create their own accounts. The form on the sign-in screen sends a request to the QA-Online team, who get back to you to set up your account.



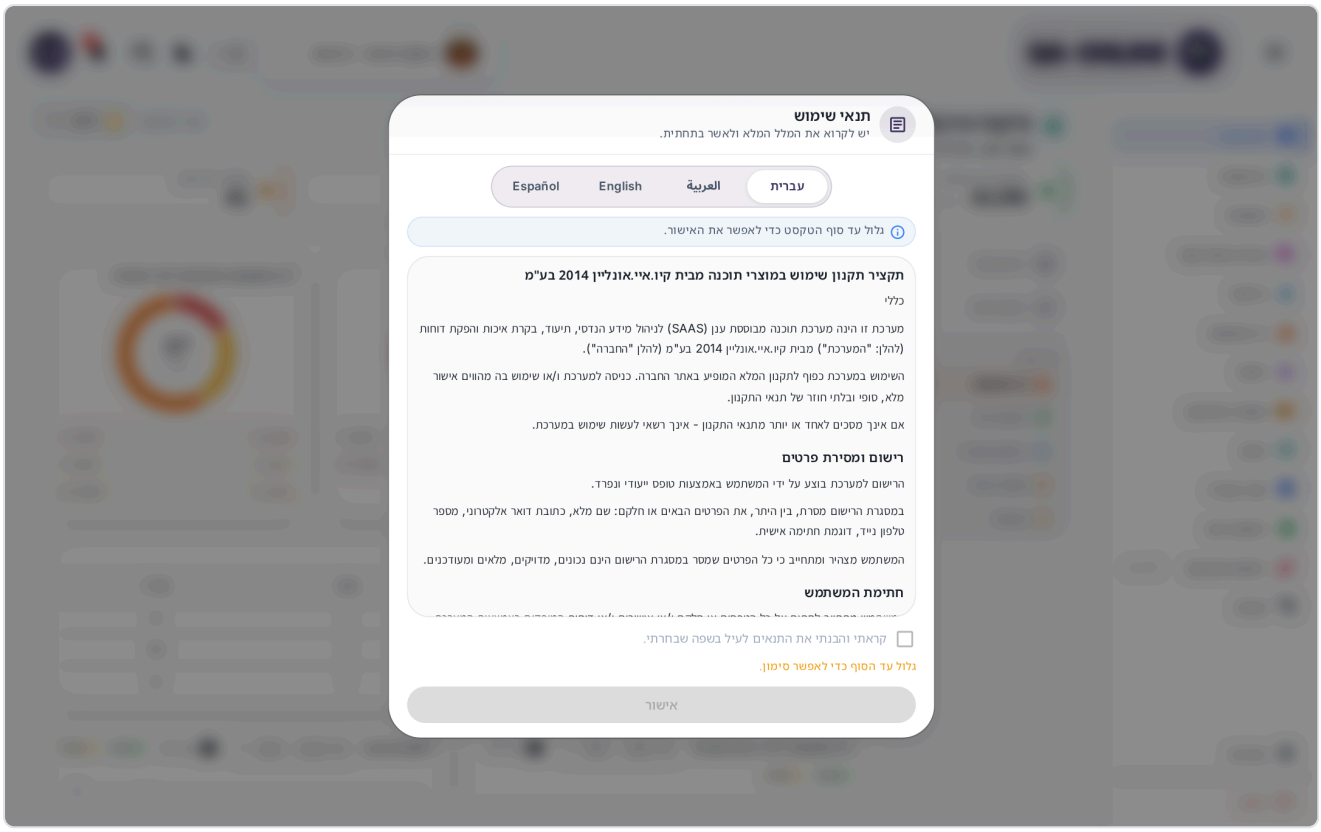
The Create Account card with four fields

1. On the sign-in screen, next to **Don't have an account?**, click **Sign Up**.
2. On the **Create Account** card, fill in **Full name**, **Phone**, **Email**, and **Company name**. All fields are required.
3. Click **Request access**.
4. You'll see the message **Thanks - we received your request and will be in touch shortly.** and return to the sign-in screen.

> **Important:** If your organization already uses QA-Online and you need to join an existing project, contact your project manager or your organization's system administrator first. They can create a user for you faster.

Accepting the terms of use

The first time you sign in, and whenever the terms are updated, a **Terms of use** window opens. You can't continue working until you accept it.



The Terms of use window with a language selector and a checkbox

1. At the top of the window, choose the document language: Hebrew (עברית), English, Arabic (العربية), or Spanish (Español).
2. Scroll to the end of the text. Until you do, you'll see the instruction **Scroll to the very end of the text to unlock the confirmation.**
3. Select **I have read the full terms of use above (in the language shown) and understand them.**
4. Click **OK**.

If you see **Could not save your acceptance. Please try again.**, check your connection and click **OK** again.

What happens when your session expires

Your session renews itself while you work. If it ends anyway (for example, after a long time when the system wasn't open), you'll be asked to sign in again.

- **In the middle of work** – the system takes you to the sign-in screen, with no additional message. After you sign in again, you'll land on the **Dashboard**, not on the screen you were on.
- **When you open the system** – if your previous session is no longer valid, the **Your session has expired** screen appears. Click **Sign in again** and sign in.
- **When you open a link to an item** – after you sign in again, the item opens.

> **Note:** Changes you didn't save before your session expired are lost. After you sign in again, reopen the item and check what was saved.

Loading screens and connection problems

While the system starts up, a loading screen appears (**Loading your workspace…**, **Restoring your session…**). It takes a few seconds. If something is delayed, one of the following screens appears:

Screen title	What happened	What to do
Your session has expired	Your previous session is no longer valid.	Click **Sign in again** and sign in.
Restoring your session	The system is reconnecting to your account.	Wait a moment. If it continues, click **Try again**.
Connection problem	There's no stable internet connection. Your saved data is still on the device.	Check your connection and click **Try again**, or continue in limited mode.
Can't connect right now	Startup is taking longer than expected.	Check your connection and click **Try again**.

- On the **Restoring your session**, **Connection problem**, and **Can't connect right now** screens, the system retries on its own and shows a countdown. You can stop the automatic retry. The countdown and the stop button currently appear in English (**Retrying automatically in …s**, **Stop auto-retry**).
- When there's no internet at all, you'll see **Waiting for your connection to come back…**. When the connection returns, the system continues on its own.
- If you've already worked on this device, a button to continue in limited mode also appears (its label currently appears in English: **Continue (limited)**). In this mode you'll see data saved on the device, but some of it may be out of date.

How to sign out

1. Click your profile picture (or your initials) in the corner of the top header.
2. At the bottom of the menu, click **Logout**.

You can also sign out from the bottom of the side menu, with **Logout**. Signing out is immediate, and there's no confirmation window.

> **Important:** On a shared computer or someone else's phone, always sign out when you finish working.

Deleting your account

You send a request to delete your account from Settings. The full explanation is in Settings.

Frequently asked questions

I forgot my username too. What do I do? Try signing in with your email address instead of your username. If that doesn't work, contact your organization's system administrator.

I got "Temporarily locked" after incorrect codes. How long do I wait? 5 minutes. The countdown appears on the screen, and after it ends you can try again or request a new code.

I changed my phone number. How do I get the SMS code? Your number is saved in your contact details in the system. Ask your organization's system administrator to update it.

I sent an access request. When can I sign in? The QA-Online team will contact you by phone or email with your sign-in details. The first time you sign in, you'll be asked to change the temporary password.

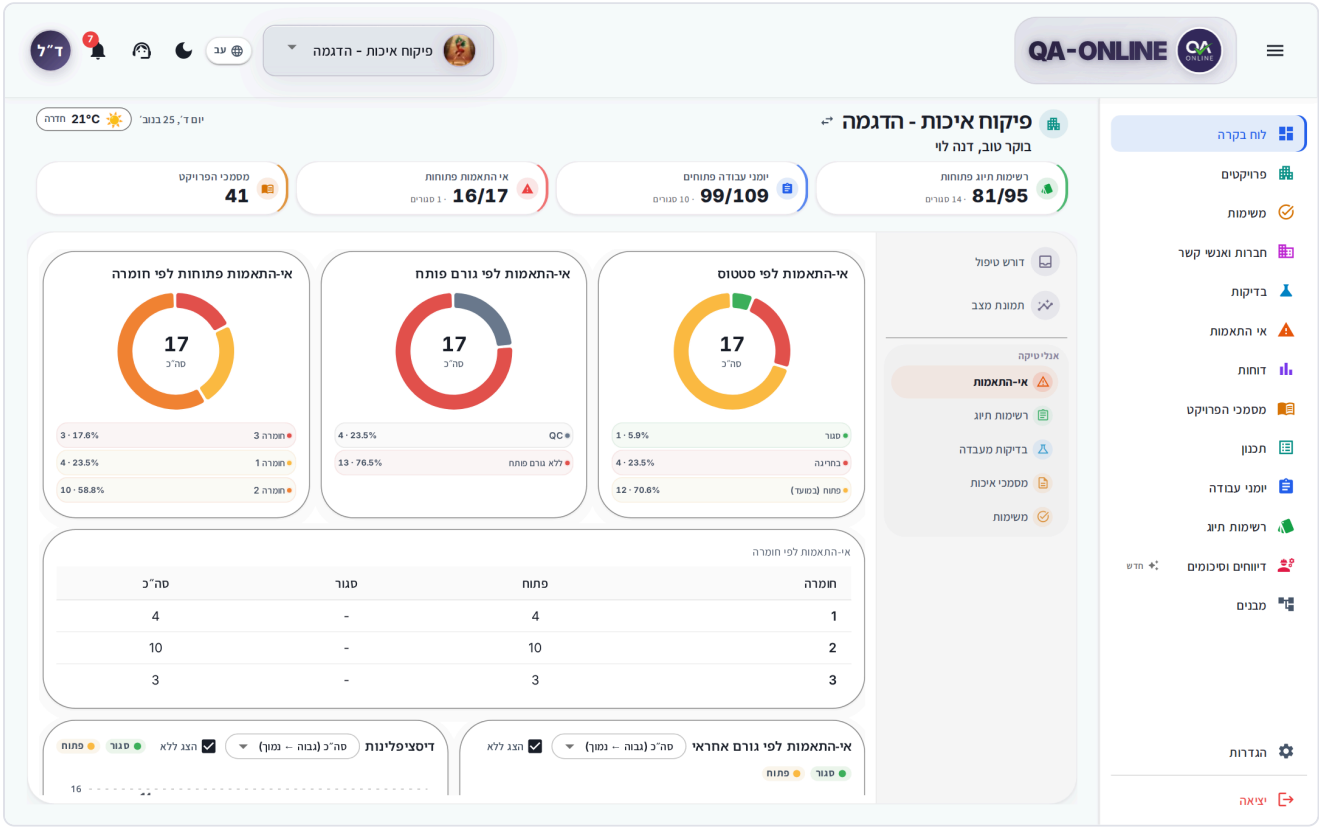
See also

- Quick start – what to do after your first sign-in.
- Settings – profile, language, signature, and account deletion.
- Using QA-Online on a phone or tablet – signing in from the browser or the app.
- FAQ and troubleshooting – sign-in and connection problems.

Getting to know the screen and navigation

Understand how the QA-Online screen is laid out, how to move between modules and projects, and how to work with lists and detail windows.

All the modules in QA-Online are built the same way. What you learn here – the side menu, the project selector, searching and filtering in lists, and the detail window – works almost identically in Checklists, Non-conformances, Tests, Work logs, and the other modules. Read this chapter once before you move on to the module chapters.



The main screen with the side menu, the top header, and the content area

Screen layout

Area	What's in it
Top header	The menu button, the logo, the project selector, language, color mode, **Support Center**, **Notifications**, and the user menu.
Side menu	All the modules available to you in the project, with **Settings** and **Logout** at the bottom.
Content area	The screen of the module you chose: a list, the Dashboard, reports, and so on.

> **Tip:** Clicking the QA-Online logo in the header always takes you back to the Dashboard.

Side menu

The side menu shows only the modules you have permission for in the current project. That's why two users in the same project may see different menus. Items appear in this order (unless you changed it with **Customize menu**):

Menu item	What you'll find there
Dashboard	The project's home screen – Dashboard and projects
Projects	All your projects – Dashboard and projects
Tasks	Tasks and approvals waiting for you – Tasks and approvals
Companies & Contacts	Companies and contacts
Tests	Lab orders and survey orders – Tests
Non Conformances	Non-conformances
Reports	Reports
Project Documents	Project documents
Design	Plans and drawings – Design
Work Logs	Work logs
Checklists	Checklists
MOM	Field reports
Structures	Structures

The item you're currently in is highlighted with a color and a bar on the side.

Badges next to items

- A **red number** next to **Tasks** – how many active tasks are waiting for you. Above 99 it shows **99+**.
- The **New** badge next to **MOM** – a module that was added recently.

How to expand and collapse the menu

- **On a computer or tablet:** click the menu button (three bars, **Toggle sidebar**) in the corner of the header. The menu collapses to a narrow strip of icons, and another click expands it again.
- **In a collapsed menu:** hover over an icon to see its name. Hovering over a group opens a small window with the items inside it.

- **On a phone:** tap the menu button to open the menu from the side. After you choose an item, it closes on its own.

Current and grouped menus

The menu has two display styles:

- **Current** (the default) – a single list of all the modules, in the order shown in the table above.
- **Grouped** – **Dashboard** always stays at the top, and below it the modules are arranged in groups by stage of work. Clicking a group name opens it and closes the others.

Group	Modules
Project	**Companies & Contacts**, **Projects**, **Tasks**, **Structures**
Planning	**Design**
Operations	**Work Logs**, **Project Documents**, **MOM**, **Checklists**
Control	**Non Conformances**, **Tests**, **Reports**

A group with no modules available to you doesn't appear.

In the grouped menu, some modules have sub-items:

- **Checklists** – **Project Checklists**, **My Checklists**, and **Checklists management** (depending on your permissions).
- **Tests** – **Lab Orders** and **Survey Orders**.
- **Reports** – the report categories.

In the current menu there's a single item for **Checklists**, and you switch between **All** and **Mine** at the top of the screen itself (Checklists).

How to customize the menu

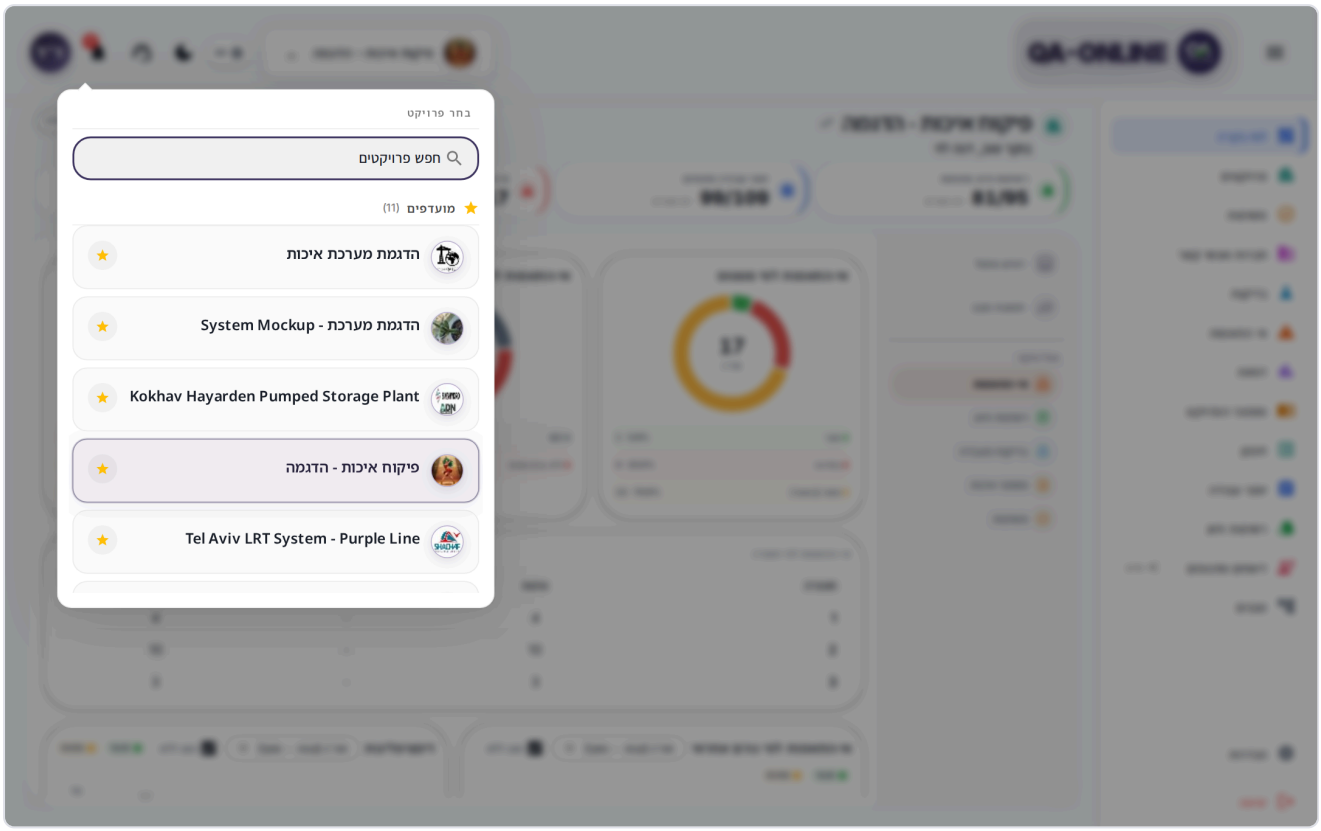
1. Open **Settings** → **Account** → **Preferences**.
2. In the **Side menu** area, choose **Current** or **Grouped**.
3. Click **Customize menu** to change the order, hide items, or (in the grouped menu) change the name, icon, and color of groups.

Your customization is saved separately for each project. **Dashboard**, **Settings**, and **Logout** always stay in the menu. The full explanation is in Settings.

> **Don't see a module?** Not every user sees every module and action. Permissions are set by your role in the project. If a module or button is missing, contact your project manager or your organization's system administrator. Also check that you didn't hide it yourself in **Customize menu**.

Project selector

Almost all the data in the system belongs to a specific project. The project selector in the top header shows the active project, and every module shows that project's data.



The project selector open, with search, favorites, and all projects

How to switch projects

1. Click the project name in the top header.
2. Type part of the project name in the **Search projects** field. Below it, you'll see how many projects were found.
3. Click the project you want.

After you switch:

- You go automatically to the **Dashboard** of the new project.
- Open detail windows close.
- The side menu updates to match your permissions in the new project.

> **Note:** Before you switch projects, save what you were working on. Open windows close when you switch.

Favorites

- Click the star icon next to a project to add it to **Favorites**.
- Favorite projects appear at the top of the list, above **All Projects**.

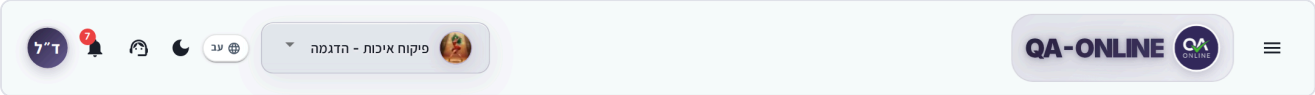
- Clicking the star again removes the project from your favorites.

In long lists, the **Show … more projects** button appears at the bottom. If the search finds nothing, you'll see the message **No results found** – try a different word.

> **Tip:** On a phone, the project selector opens as a sheet from the bottom. Close it with the **Close** button or by dragging it down.

> **Don't see a project?** A project appears in the list only after you've been assigned to it. Contact your project manager. If you see **No Projects Available**, your account isn't assigned to any project yet.

Header



The top header on a computer, with the icons marked

Element	What it does
Menu button (three bars)	Opens, closes, or collapses the side menu.
QA-Online logo	Returns to the Dashboard.
Project selector	Choose the active project.
Language selector	Switch between Hebrew (עברית), English, Arabic (العربية), Spanish (Español), and Russian (Русский).
Color Mode icon (sun / moon)	Switch between **Light** and **Dark**.
Support Center icon (an agent)	Open a support ticket – Support and help.
Notifications bell	Overdue test orders, tasks sent to you, and suppliers whose approval has expired.
Profile picture	The user menu.

User menu

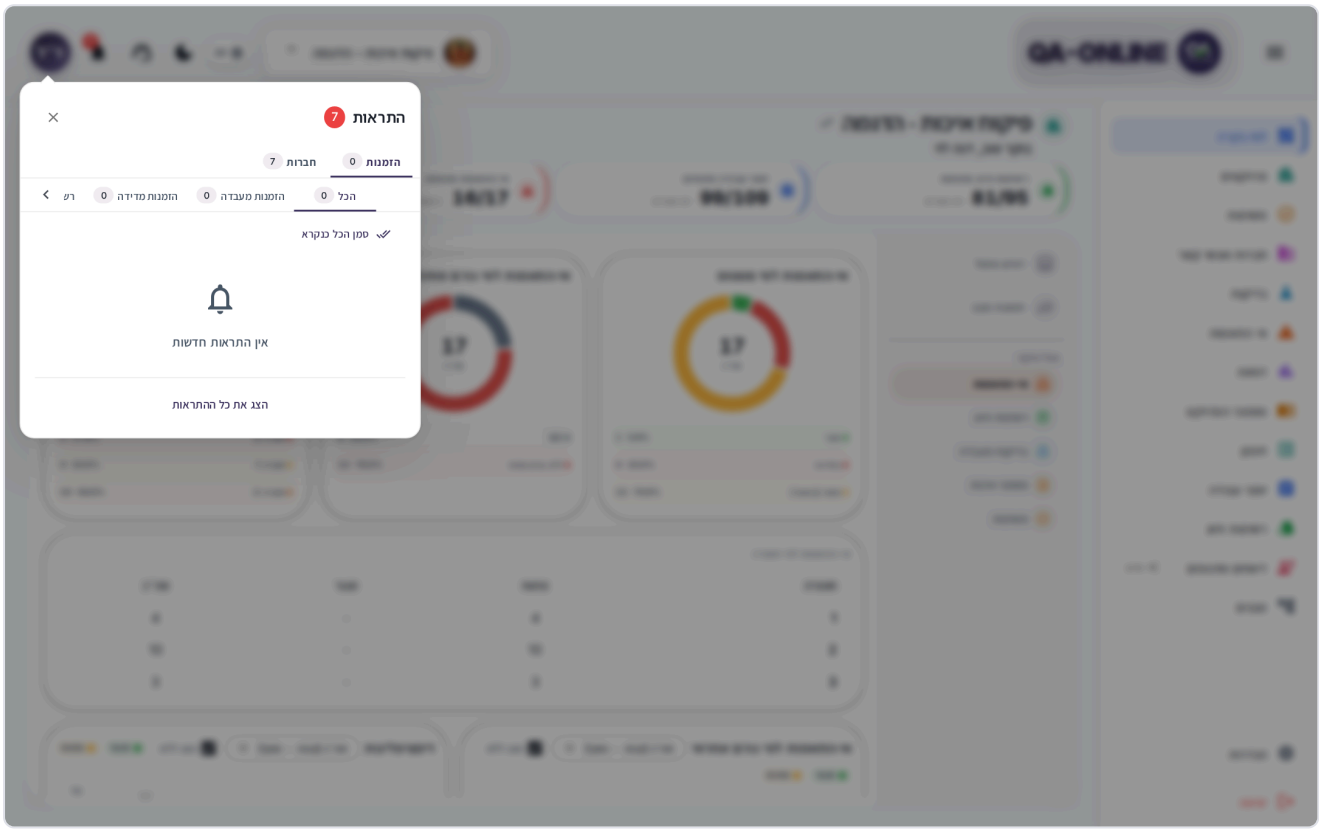
Click your profile picture (or your initials) to open the menu:

- **Your name and username** – clicking opens your profile settings, where you can also change your picture.
- **Settings** – Settings.
- **Logout** – sign out of the system (Sign-in and account).

> **Tip:** **On a phone**, the header is more compact. Language, color mode, **Support Center**, and **Notifications** move into the user menu, and the number of unread notifications appears on your profile picture.

Notifications

The bell in the header collects notifications that need your attention. A red number on the bell shows how many notifications are unread.



The notifications window open, with the Orders and Companies tabs

1. Click the bell.
2. Choose a tab: **Orders** or **Companies**.
3. In the **Orders** tab, filter by **All**, **Lab Orders**, **Survey Orders**, or **Checklists**.
4. Click a notification to open the related item. If it belongs to a different project, the system switches you to the right project.

Tab	What appears in it
Orders	Overdue lab and survey orders, and tasks and approvals sent to you. Tasks and approvals appear only under **All**.
Companies	Suppliers whose approval has expired (**Approval expired**).

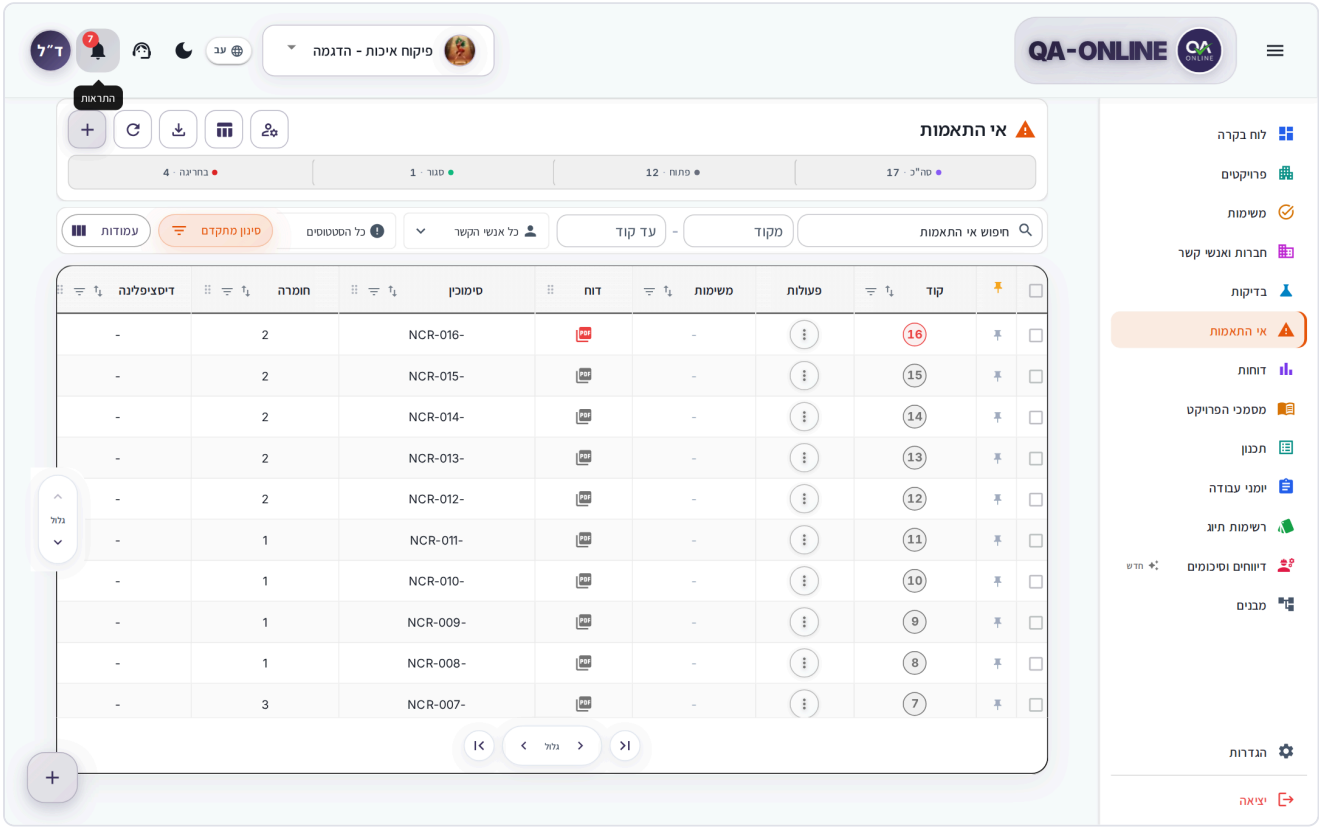
- **Mark all as read** – clears the counter.
- **View all notifications** – opens a full window with all your notifications.

- If there are no notifications, you'll see the message **No new notifications**.

> **Tip:** When someone sends you a new task, a **New task** window pops up even while you're working. From there you can click **Go to task** or **All tasks**. The full explanation is in Tasks and approvals.

List screens: what all modules share

Most modules open on a list screen: a header with the module name and counters, a search and filter bar, and the list itself.



A typical list screen with a header, a filter bar, and a table

Counters in the header

At the top of the list you'll see counters, such as **Total**, **Today**, and **This week**. Some modules also have counters by status, such as open, closed, or overdue.

- Clicking a counter (for example, **This week**) filters the list by it.
- Clicking it again removes the filter.
- Below the header, you'll see how many items are shown out of the total.

View modes

Click the **View** button in the header and choose:

- **Table** – dense rows for scanning and focused work (on a computer only).
- **Cards** – visual cards with grouping.

- **Calendar** – browse by date, in a month view (in modules where items have a date).

Your choice is saved for each module. On a phone, **Cards** and **Calendar** are available.

How to search

1. Type in the search field in the bar above the list.
2. The list filters as you type.
3. To clear it, click the X inside the field.

How to filter

- **Filters in the bar** – depend on the module: type, status, opened by, and more.
- **Code range** – enter **From Code** and **To Code** to show only items within a range of numbers. The filter applies after you press Enter or leave the field. If the starting code is greater than the ending code, you'll see the message **From code is greater than To code**.
- **Advanced Filters** – a button that opens more filters, such as **From date** and **To date**. A number on the button shows how many advanced filters are active.
- **On a phone**, the bar is collapsed. Tap the filters button to open it, and **Hide filters** to close it.

Active filters appear as tags below the bar. Clicking the X on a tag removes one filter. **Clear all** or **Clear filters** removes them all.

Column filtering and sorting (table view)

1. Click a column name to sort: ascending, descending, and once more to remove the sort.
2. Click the filter icon in the column header. The **Show rows where** window opens.
3. Select or clear values. You can search in **Search values…**, or use **Select all** / **Deselect all**. Changes apply immediately.
4. To remove a filter, click **Clear column filter**, or **Clear column filters** to remove all column filters.

How to choose which columns appear

1. In table view, click the **Columns** button.
2. Select or clear columns to show or hide them.
3. Drag a column to change the order. You can also drag a column header directly in the table.
4. Click **Done**.

Show all columns brings back hidden columns, and **Reset columns** restores the default. Your choice is saved to your account. Some columns (like code and actions) are marked **Always visible** or **Fixed position**.

Actions on a single item

- **Clicking a row or card** opens the detail window.

- The **three-dot menu** on a row shows the actions available for the item (for example, duplicate, report, add task). On a computer, you can also right-click the row.

Selecting multiple items and bulk actions

1. In table view, select the checkboxes at the start of the rows. The checkbox in the header selects all rows.
2. A bar appears with the module name and the number of selected items (for example, **Non Conformances - 3 selected**).
3. Choose an action from the bar. You can also right-click one of the selected rows.

Show selected shows only the items you selected. **Clear selection** cancels the selection. The available actions depend on the module and your permissions: pin, add task, send, reopen, export, and more.

Tasks column

Many lists have a **Tasks** column that shows how many open tasks are related to each item.

1. Click the number in the column. The **Open tasks** window opens.
2. Click a task to see its details.
3. Click **Open …** to go to the item, or **View tasks** to go to the Tasks screen.

Back to list returns to the list of tasks in the window. You can also filter the list to **Has open tasks** or **No open tasks**. For more about tasks, see Tasks and approvals.

Calendar view

In **Calendar** view, items are shown by date on a monthly calendar.

- **Previous month** / **Next month** – move between months. **Today** – return to the current month.
- Clicking the month name opens **Select month and year**.
- When a cell has more items than fit, a link to the additional items appears. Clicking a day opens all of its items.
- On a phone, tap a day to see its items.

Special list states

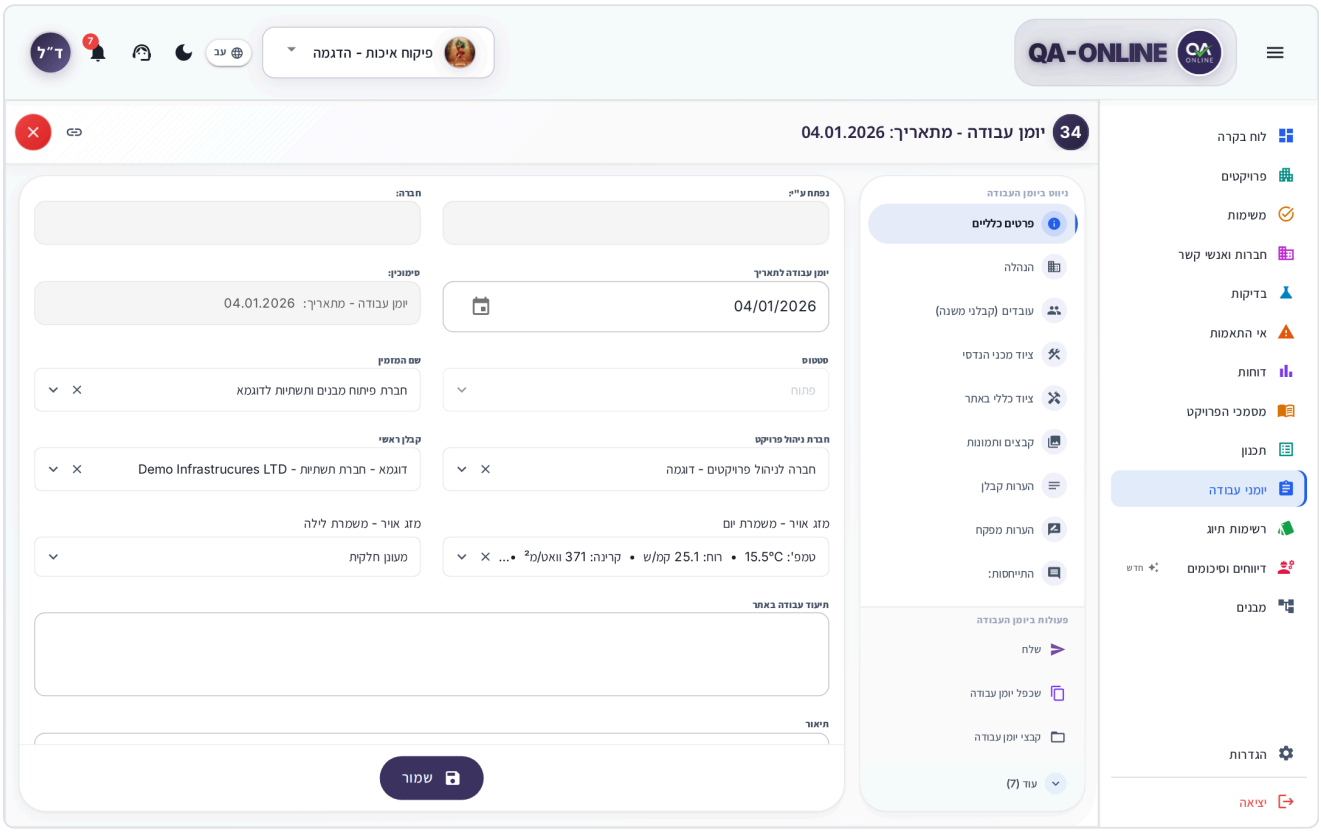
What you see	What it means	What to do
A flashing gray skeleton	The list is loading.	Wait.
A message saying there are no items yet	There are no items in this module in this project yet.	Create a new item, if you have permission.
No results match your filters	The filters or the search are hiding all the items.	Click **Clear Filters**.

What you see	What it means	What to do
Unable to load data	There was a problem loading.	Click **Try again**. If it keeps happening, click **Open support ticket**.
Access Restricted	You don't have permission for this module in the project.	Contact your project manager, or click **Open support ticket**.

Tip: The **Open support ticket** button opens a ticket that already includes a description of the problem (for example, "I don't have access to Checklists in this project"). Add details and send it. See Support and help.

Detail window

Clicking an item in a list opens its detail window. Here you view all the information, edit, attach files, and take actions.



A detail window with navigation between sections and an actions area

- **Navigation between sections** – at the side of the window (or in a top bar), a list of the item's sections appears, under a heading such as **Navigate in document** or **Navigate in non-conformance**. Clicking a section jumps to it.
- **Actions area** – under a heading such as **Operations in document**, **Operations in non-conformance**, or **Operations in checklist**. This is where actions like report, send, duplicate, and files live. If there are many actions, click **More (...)** to see them all and **Show less** to collapse them.
- **Copy link** – copies a direct link to the item. On a phone, the button is called **Share**. See Common tools.

How to close a detail window

- Click the close button (X) in the corner of the window, or
- Click your browser's **Back** button.

Either way, you return to the list with the same filters and search. Your browser's **Forward** button opens the same item again.

> **Note:** The create form for a new item also closes with the **Back** button. If you've already filled in data, some modules ask you to confirm that you're leaving without saving.

> **Tip:** **On a phone**, you can choose between **Side menu view** and **Accordion view** (sections that open one below the other) with the button in the window header. Your choice is saved.

> **Don't see an action?** Some actions (delete, close, reopen, sign) appear only for users with the right permission. Contact your project manager.

Confirmation dialogs

Before important actions – saving, signing, closing, canceling, or deleting – a short confirmation window opens. For example: **Sign Step** – "Do you want to sign the step?".

- Click the action button (for example, **Sign**, **Save**, **Cancel order**) to confirm.
- Click **Cancel** to go back without doing it.

> **Note:** Some actions can't be undone (for example, canceling a checklist or deleting). Read the message in the window before you confirm.

Keyboard shortcuts

QA-Online has no general keyboard shortcuts for navigation or search. These are the shortcuts that do work:

Key	What it does
Esc	Closes a window, menu, or dropdown.
Enter	In the **From Code** / **To Code** fields – applies the filter.
Tab / Shift+Tab	Moves between fields and buttons.
Enter or Space	Activates the selected button or item.
Ctrl+Z / Ctrl+Y	In the image editor and plan markup – undo and redo an action. See Common tools.

> **Tip:** On a Mac, use Cmd instead of Ctrl.

Permissions

Not every user sees every module and action. Permissions are set by your role in the project. If a module or button is missing, contact your project manager or your organization's system administrator.

What this means in practice:

- A **module you don't have permission for** doesn't appear in the side menu. If you reach it from a link, you'll see **Access Restricted**.
- With **View only permission**, you can open and read items, but the save, close, and send buttons don't appear or aren't active.
- **Permissions differ between projects.** In one project you may have full access, and in another, view only.

Direct links to items

Every item has a direct link, for example to a specific non-conformance or work log. You can send it by email or WhatsApp.

- When you open a link, the system **automatically switches to the right project** and opens the item.
- If you haven't signed in yet, you'll be asked to sign in, and after you do, the item opens.
- If you aren't assigned to the link's project, you'll see the message **You don't have access to this project** and be taken to the Dashboard.
- An address that doesn't exist in the system takes you to the Dashboard.

To learn how to copy a link to an item, see Common tools.

Frequently asked questions

I switched projects and landed on the Dashboard. Is that normal? Yes. Switching projects always takes you to the Dashboard of the new project, so you don't end up working on the previous project's data by mistake.

A module I had yesterday disappeared from the menu. Check that you're in the right project in the project selector. Also check in **Settings** → **Account** → **Preferences** → **Customize menu** that you didn't hide it. If it's still missing, contact your project manager.

The list is empty even though I know there are items. A filter or search is probably still active. Look for filter tags below the bar and click **Clear all**. Also check that no counter in the header is still selected (for example, **This week**).

How do I get back to the list from a detail window? Click the close button (X) or your browser's **Back** button. The list will be waiting for you with the same filters and search.

See also

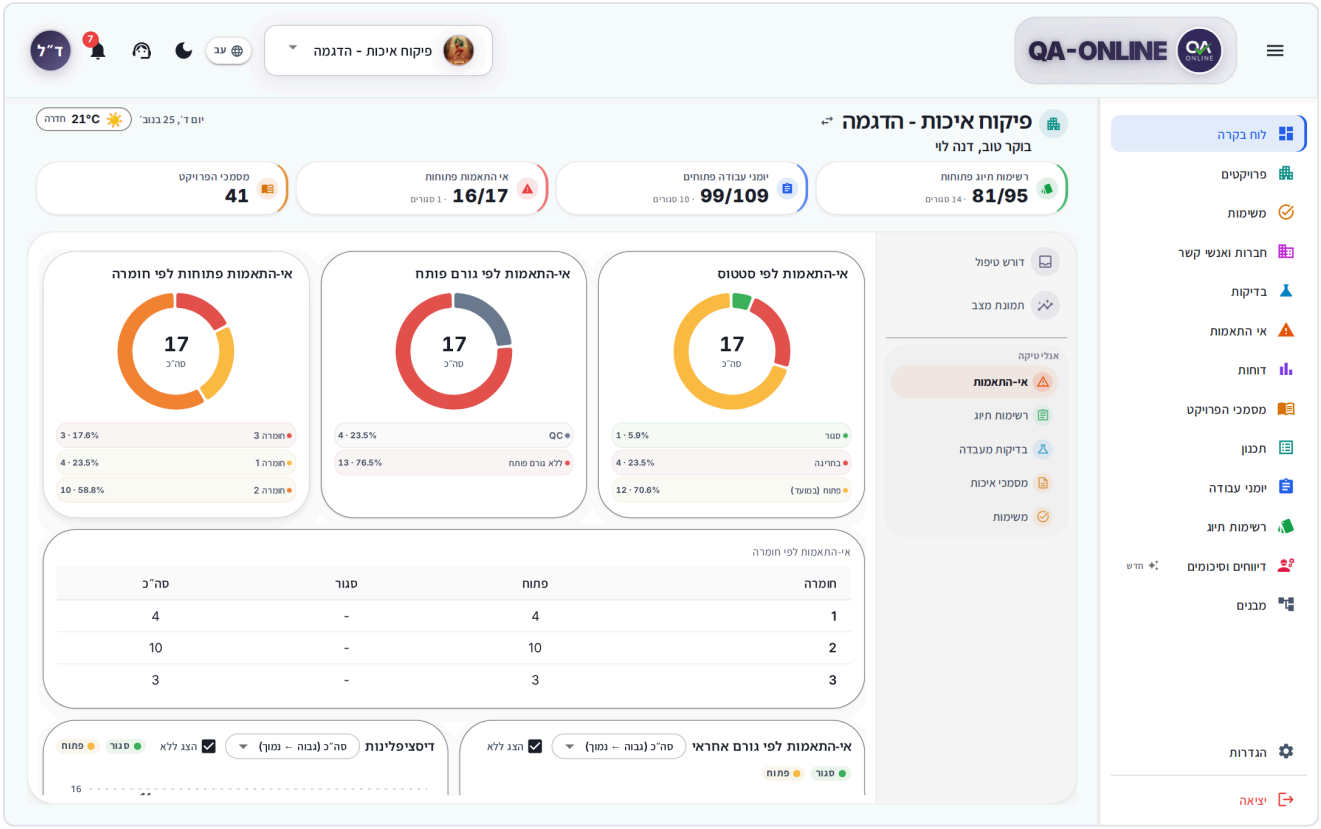
- Dashboard and projects – the home screen and switching between projects.
- Common tools – location, files, export, copying a link, and pinning.
- Settings – the side menu style, language, and dark mode.
- Using QA-Online on a phone or tablet – how all of this looks on a phone.

Daily work

Dashboard and projects

The Dashboard shows what's happening in your active project at a glance, and the Projects screen lets you switch between your projects.

Almost everything you see in QA-Online belongs to a single project: checklists, non-conformances, work logs, documents, and tasks. That's why the first step of every workday is to make sure you've selected the right project. The Dashboard shows you what's waiting for you, what was opened this week, and where you left off last time.



The Dashboard on desktop – the project header, the metrics row, and the "Attention" section

What you see on the Dashboard

Open the Dashboard from the **Dashboard** item in the side menu. It has three parts, from top to bottom:

1. **Project header** – a personal greeting ("Good morning, …"), the name of the active project, and the weather at the site.
2. **Metrics row** – four tiles with the project's key numbers.
3. **Workspace** – three sections: **Attention**, **Overview**, and **Analytics**. On a computer, you choose a section from the list beside the workspace. Next to **Attention**, you'll see the number of items waiting for you.

If you haven't selected a project yet, you'll see the message **No project selected**. Choose a project in the project selector in the top bar (see How to switch projects).

> **Tip:** The Dashboard remembers which section and tab you were on, and returns you to them next time.

Project header

- **Project name** – next to the name, there's a quiet **Switch project** button that opens the same project list as the top bar. If you have only one project, the button isn't shown.
- **Weather** – the temperature and conditions at the project's location. Click it to see **Wind**, **Humidity**, and **Radiation**. To change the city, click **Change location** in the detail window.
- **Add location** – appears in place of the weather when the project doesn't have a location yet. Click it, then search for a city in the **Search location...** box or click the map.
- **Open support tickets** – if you've opened a support ticket that isn't closed yet, a badge such as "2 open tickets" appears. Click it to open the Support Center (see Support and help).

Metrics row

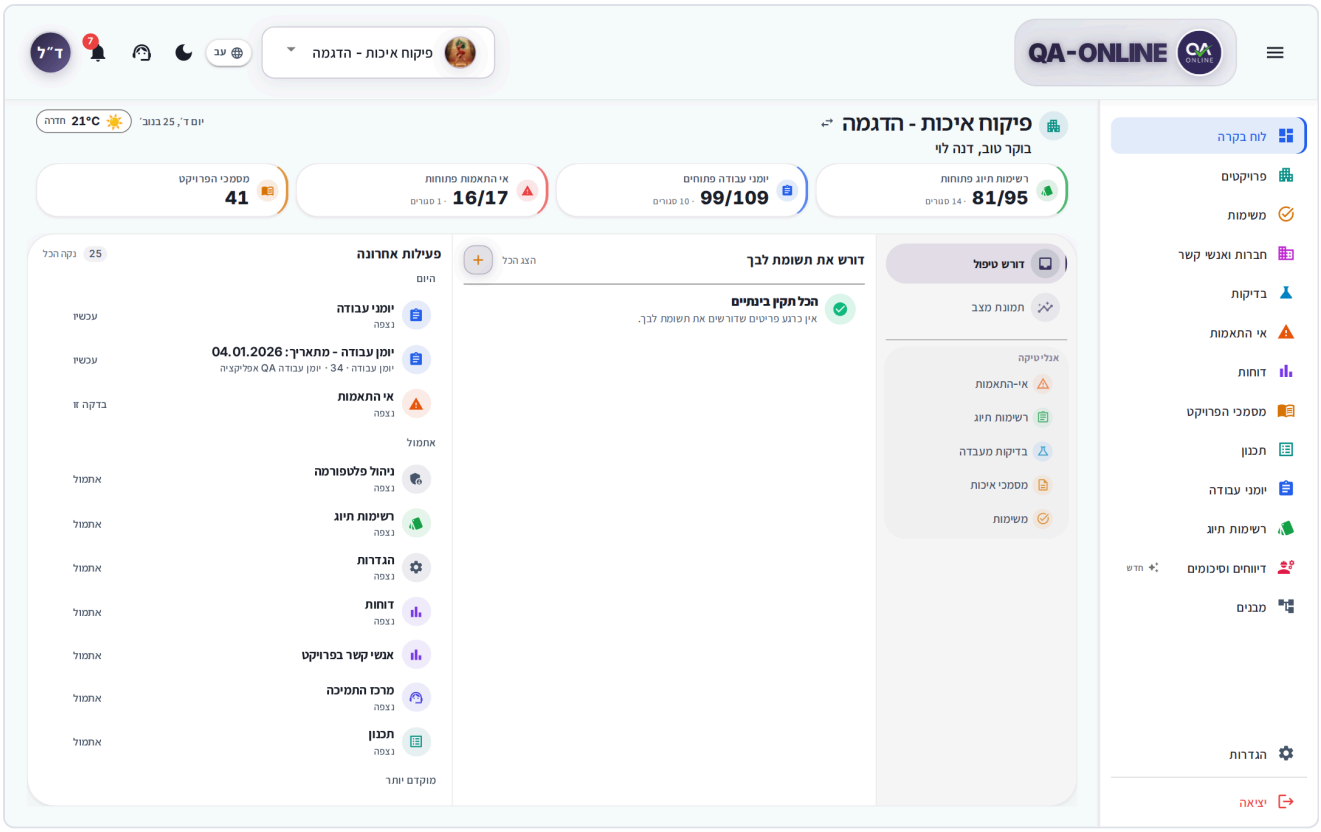
Tile	What it shows	Where it goes
Open checklists	Open out of the total, and how many are closed	Checklists – the **All** view
Open work logs	Open out of the total, and how many are closed	Work logs
Open non-conformances	Open out of the total, and how many are closed. The color gets stronger as the number of open items grows	Non-conformances
Project documents	The total number of documents in the project	Project documents

Click a tile to go straight to the matching list.

> **Note:** On the first load, the numbers may appear a few seconds after the rest of the screen. QA-Online keeps trying in the background, so you don't need to refresh.

Attention: tasks and recent activity

This is the section that opens by default. It has two parts.



The "Attention" section – the "Requires your attention" list with "Recent Activity" beside it

Requires your attention

A summary of your incoming tasks and your activity in the project: approvals passed to you, checklist steps assigned to you, and tasks that others opened for you. Non-conformances you opened whose expected closing date has passed or is approaching appear at the top of the list.

- Filter by module with the chips **All**, **General**, **Project Documents**, **Checklists**, **Non Conformances**, and so on.
- Click an item's title to open the document or record.
- Click **Done** on a card to close a task you've handled.
- Click **View all** to go to the Tasks screen.
- Click **+** in the section header to create a new task (see How to create a new task).
- If you've sent tasks that aren't completed yet, a link such as "3 waiting on others" appears. It opens the **Outgoing** box on the Tasks screen.

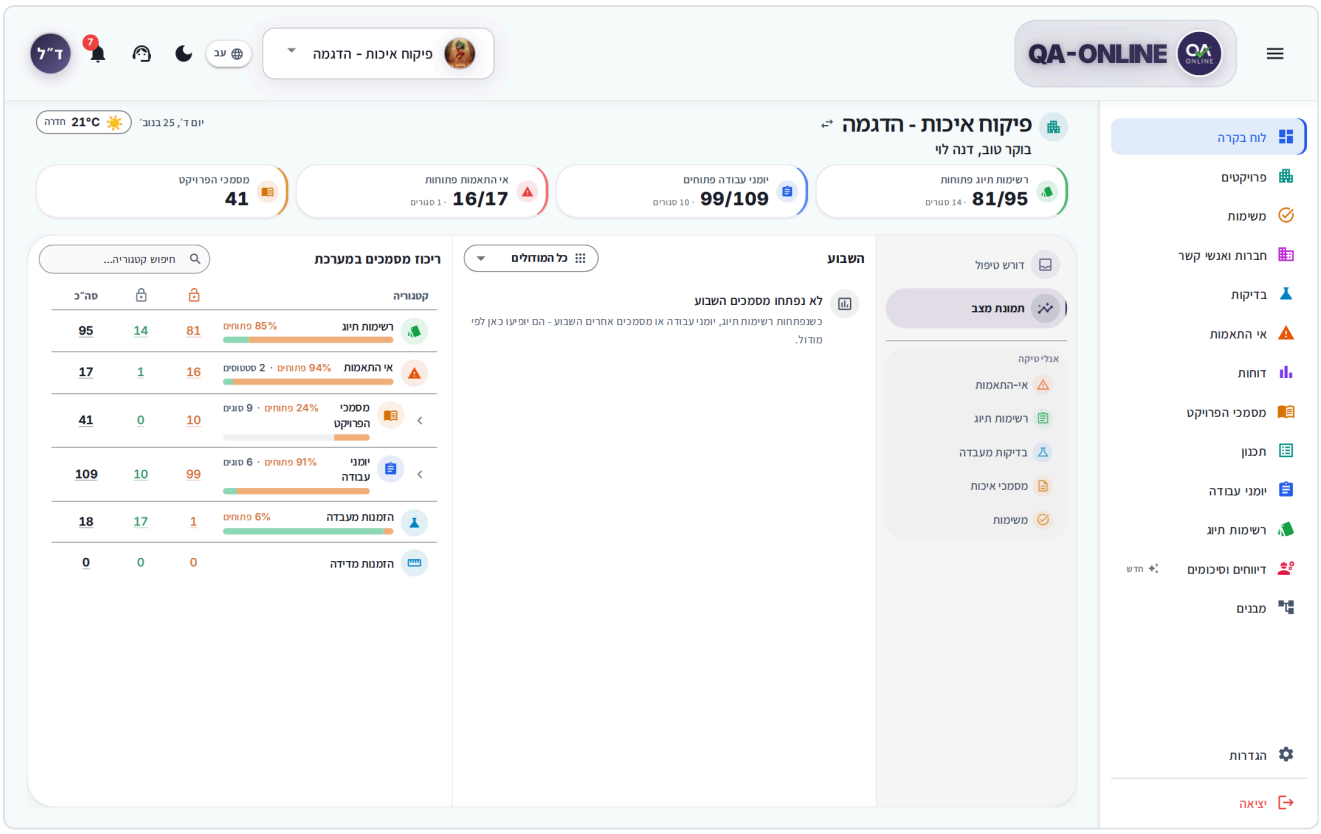
When there's nothing to handle, you'll see **All clear for now**. Actions such as **Mark all done**, the **Done** view, and export are available only on the Tasks screen itself.

Recent activity

A personal list of the items and modules you've opened recently in the project, grouped by **Today**, **Yesterday**, **This week**, and **Earlier**. Click an item to return to exactly where you left off. You can pin items, remove them, and clear the list – the full explanation is in Shared tools.

Overview: this week and documents summary

This week



The "This week" panel – a bar chart by module, a comparison with last week, and open versus closed

The **This week** panel shows how many documents were opened in the project over the last seven days, by module. It reflects the whole team, not just what you opened.

- **Opened** – the total number of documents opened this week.
- **vs last week** – the percentage change compared with the previous week.
- **Busiest day** – the day on which the most documents were opened.
- **Open** / **Closed** – how many of this week's documents are still open and how many have already been closed.

To focus on one module, choose it in the **All modules** box. Lab orders and survey orders are shown in separate rows. If nothing was opened, you'll see the message **No documents opened this week**.

How to open a module's documents for the week

1. In the **This week** panel, click the number or the bar for the module.
2. The module's list opens already filtered to the documents opened this week.

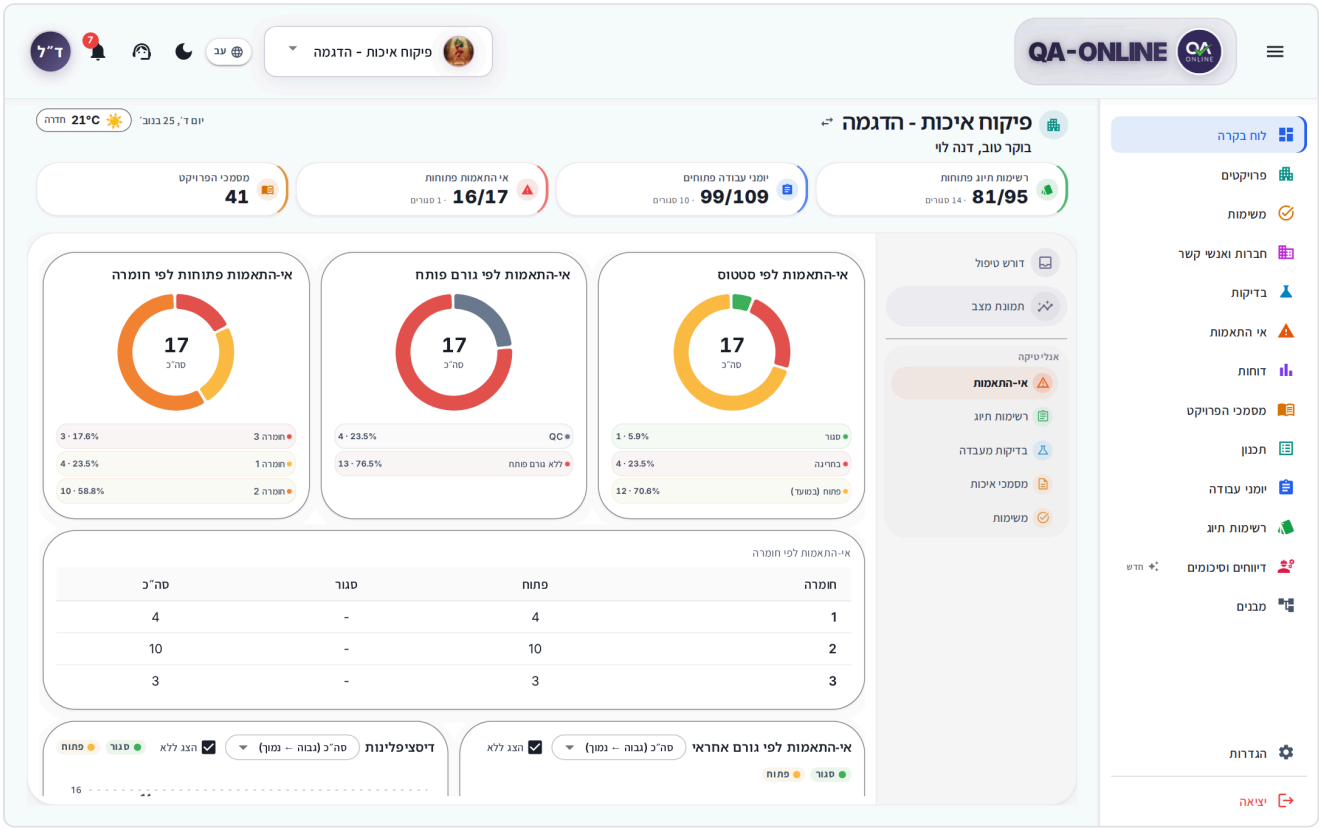
Documents summary

A table of all the documents in the project, of all time, by category: **Checklists**, **Non Conformances**, **Project Documents**, **Work Logs**, **Lab Orders**, and **Survey Orders**. Each row shows **Open**, **Closed**, and **Total**.

1. Click a category to see the document types in it.
2. Click the number in the **Open**, **Closed**, or **Total** column to open the filtered list.
3. To go back, click **Back to categories**.

> **Tip:** Use the search box at the top of the table to find a category by name (**Search categories…**) or a document type by name (**Search document types…**).

Analytics



The "Analytics" section – the Non-conformances tab with charts by status and by severity

The **Analytics** section shows live charts for the active project, divided into tabs. On a computer, the tabs appear as a submenu under **Analytics** in the list of sections.

Tab	What you see
Non-conformances	By status (**Open (on time)** / **Delayed** / **Closed**), by creator, by severity, by responsible party, and by discipline
Checklists	By status and by type, **My checklists**, and the number of **Checklists assigned to me**
Lab tests	By status, by result (**OK** / **Not OK**), and by material category
Quality documents	Documents in progress, by module and type

Tab	What you see
Tasks	Open, overdue, and completed tasks across the whole project, the **Completion** percentage, and breakdowns **By module** and **Workload by person**

- Click a segment in a chart to open the list, filtered by what you clicked.
- In open-versus-closed bar charts, you can change the order in the **Sort** box.
- A chart with no data isn't shown. An empty tab shows a message such as **No non-conformance analytics yet**.

How to check tasks across the project

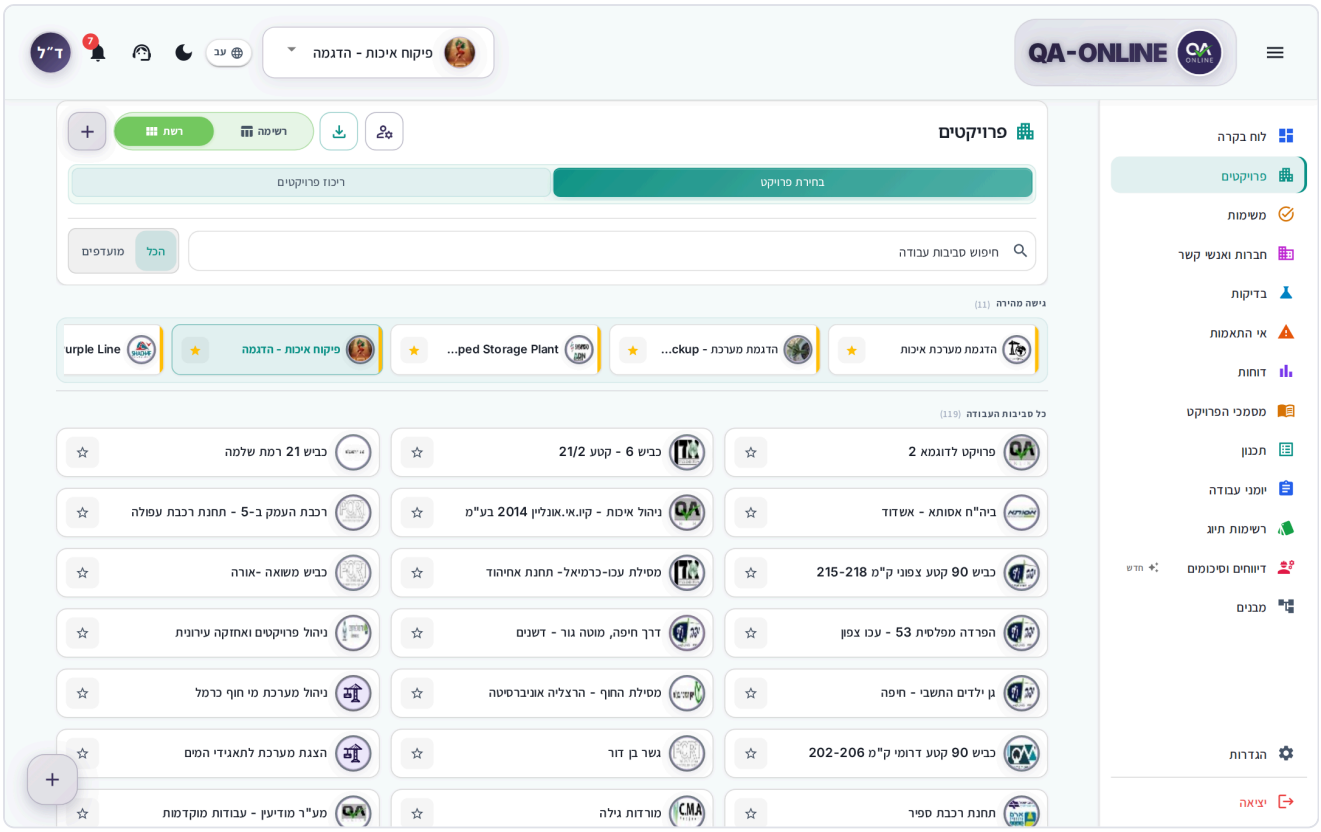
1. On the **Tasks** tab, click a number, a legend item, or a module or person row.
2. A window opens with the list of tasks. At the top, choose open, overdue, on time, or done.
3. Click a task to open the item it's related to.

The window lists only tasks that are related to an item. Private general tasks are counted but not listed. To go to your own tasks, click **My tasks**.

> **Don't see this option?** Not every user sees every module and action. Permissions are set by your role in the project. If a module or button is missing, contact the project manager or your organization's system administrator.

Projects

The **Projects** screen (in the side menu) shows all the projects you're assigned to. From here, you choose the active project, mark favorites, and export the list.



The "Projects" screen in grid view – a "Quick access" strip with favorites and "All workspaces" below it

The screen is organized like this:

- **Quick access** – a strip at the top with the projects you've marked as favorites.
- **All workspaces** – all your other projects.
- The project that's active right now is highlighted in color.
- Each card shows the logo, the project name, its code, and a short description (if one was entered).

If you have many projects, click **Show … more projects** at the bottom of the list.

How to switch projects

There are three ways, and they all do the same thing.

From the project selector in the top bar

1. Click the project name in the top bar.
2. If needed, type part of the name, code, or description in the **Search projects** box.
3. Click the project you want.

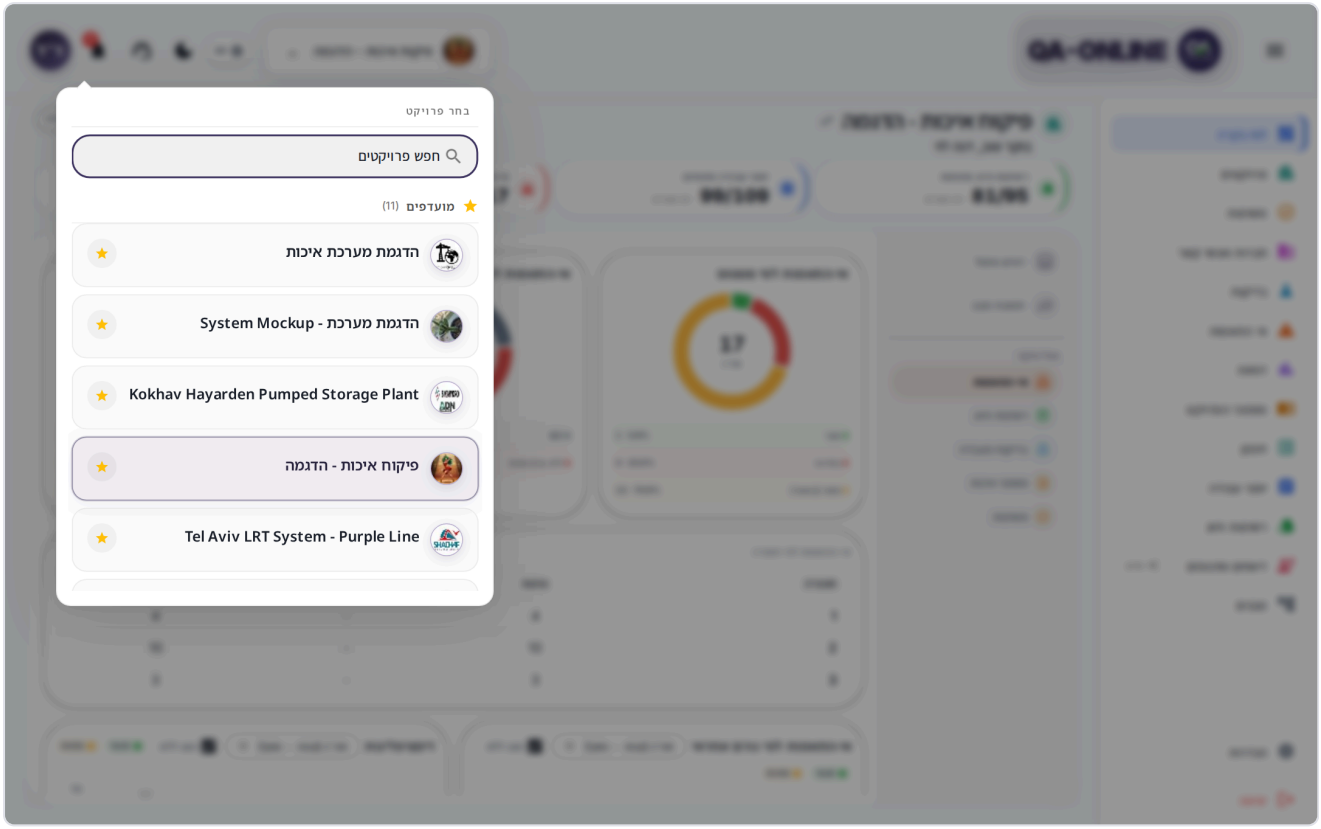
From the Projects screen

1. In the side menu, click **Projects**.
2. Click the project's card.

From the Dashboard

1. Click **Switch project** next to the project name.
2. Choose a project from the list.

After you switch, you always land on the **Dashboard** of the new project, no matter which screen you were on. All modules now show that project's data.



The project selector in the header – search, "Favorites", and "All Projects"

Important: Before you create or save anything, check the project name in the header. Items are always saved in the active project.

Tip: If you open a link to a document or task in a different project, QA-Online switches you to the right project automatically – as long as you're assigned to it.

How to search for a project

1. On the **Projects** screen, type in the **Search workspaces…** box.
2. The list filters as you type, by name, code, or description. Below the box, you'll see how many projects were found.
3. To return to the full list, click the clear icon in the box.

If there are no results, you'll see the message **No results found**. Click **Clear search**, or try a shorter part of the name.

How to mark a project as a favorite

1. On the **Projects** screen, click the star icon on the project's card (**Pin project**).
2. The star turns yellow, and the project moves to the **Quick access** strip.
3. To undo, click the star again (**Unpin project**).

Favorite projects also appear first in the project selector in the top bar, under **Favorites**. The mark is saved to your account and appears on every device you sign in from.

How to filter and change the view

- **Filter** – choose **All** to see all projects, or **Starred** to see only the ones you've starred. If you have no favorites, you'll see the message **No starred projects** with the **Show all projects** button.
- **View** – in the screen header, choose **Grid** (cards) or **List** (rows). QA-Online remembers your choice.

The order of the projects is fixed: favorites first, then all the rest. You can't sort the list any other way, and you can't filter by active or inactive projects.

How to export the projects list

1. On the **Projects** screen, click the download icon in the header (**Export projects PDF or Excel**).
2. In the **Export** window, choose **PDF** or **Excel**.
3. The file is created in the background, so you can keep working in the meantime. A PDF is saved to your device when it's ready. For Excel, a preview opens first, and you download from there.

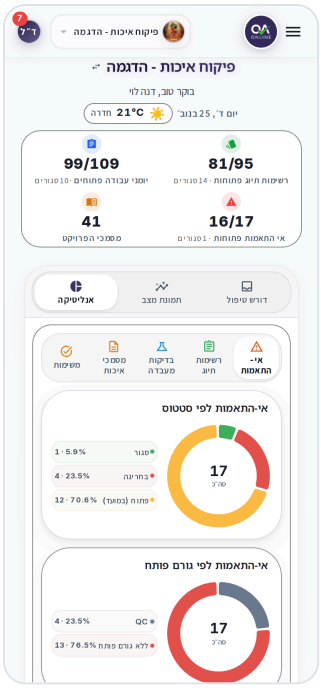
The file includes all the projects in the view you chose (**All** or **Starred**): the logo, the project name, whether it's a favorite, and whether it's the active project. Search doesn't narrow the file. For preview and download, see Shared tools.

Project details and settings

You don't edit project details on the Projects screen. General details, the logo, the banner, and project options are managed in **Project settings**, inside the Settings screen (see Settings).

On phones and tablets

- **Dashboard** – the sections appear as tabs at the top of the screen: **Attention** | **Overview** | **Analytics**. Recent activity shows the first few items, and **View all** opens the rest.
- **Project selector** – on a phone, it opens as a sheet from the bottom of the screen. To close it, drag it down.
- **Projects screen** – on a phone, you always see the list view.



The Dashboard on a phone – the section tabs at the top of the screen

Frequently asked questions

Why don't I see a project I'm supposed to work on? A project appears only after you've been assigned to it. Contact the project manager or your organization's system administrator.

How do I open a new project? New projects can't be created from this screen. Contact your organization's system administrator.

I switched projects and landed on the Dashboard. Is that normal? Yes. After you switch projects, QA-Online always takes you to the Dashboard, so you don't keep working by mistake on a screen from the previous project.

What's the difference between "This week" and "Recent Activity"? This week counts documents that the whole team opened in the project. **Recent Activity** is a personal list of items that you opened.

The numbers on the Dashboard aren't updating. The metrics update when you open the Dashboard. Go to another screen and come back, or refresh the page in your browser.

See also

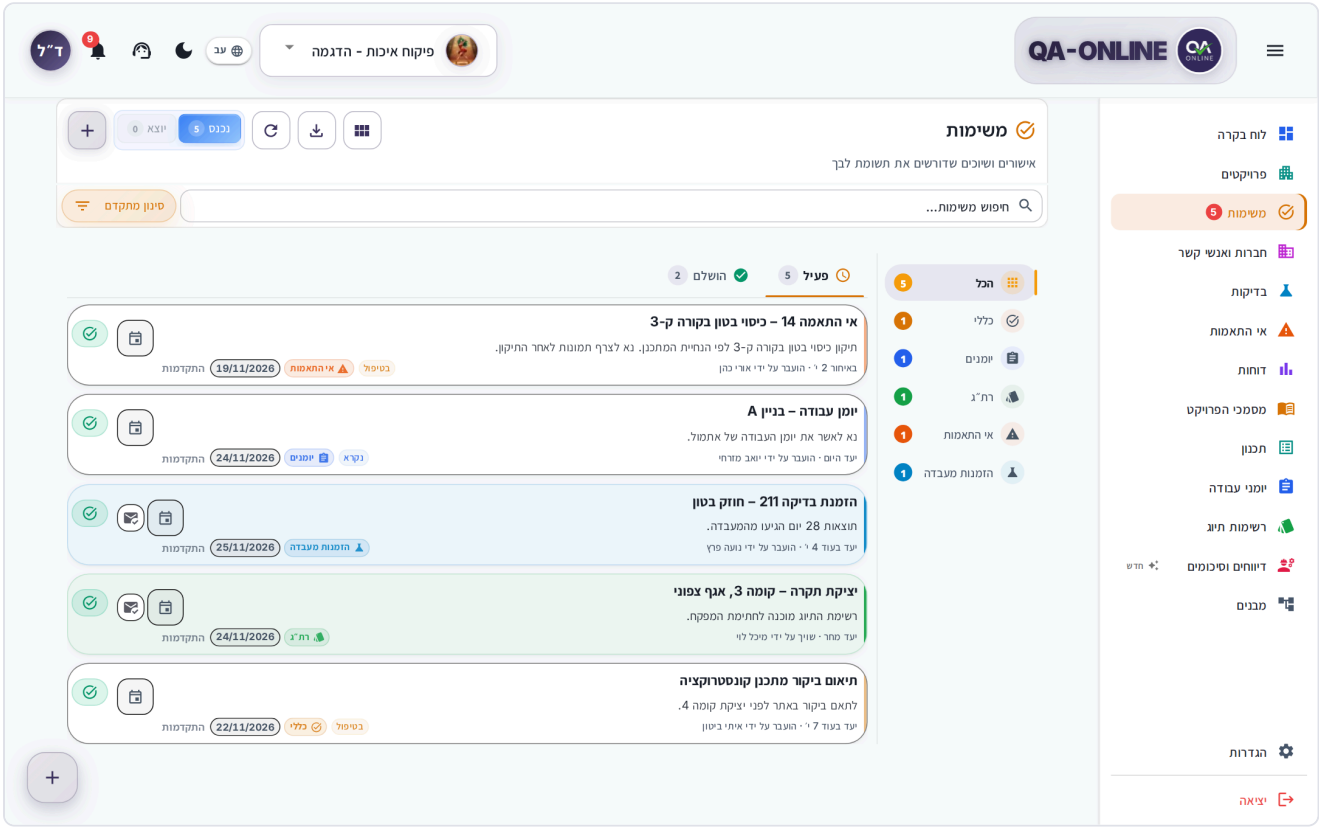
- Tasks and approvals – the full list of what's waiting for you and what you've sent.
- Shared tools – recent activity, pinning, export, and preview.
- Settings – project details, logo, and location.
- Getting to know the screen and navigation – the top bar and the side menu.

Daily work

Tasks and approvals

Everything that's waiting for you – approvals, steps, and tasks – and everything you've sent to others, in one place.

When someone passes a document to you for approval, assigns you a checklist step, or opens a task for you, the item appears on the **Tasks** screen. From here, you open the document, handle it, and follow its progress. The screen is for everyone who works on the project: inspectors, site managers, quality managers, contractors, and consultants.



The Tasks screen – the "Incoming" box, the "Active" tab, modules on the side, and task cards

What an approval is and how it reaches you

Many documents in QA-Online go through an **approval process**: a sequence of **steps**, where each step belongs to a person or a role. For example, the site manager fills in a work log, the inspector approves it, and the project manager signs at the end. In checklists, each step is an inspection that needs a signature.

When it's your turn, a **task** is created for you. It appears on the Tasks screen, on the Dashboard under **Requires your attention**, and in a pop-up window (or as a notification on your phone).

How to approve or return a step

The exact steps differ in each module, but the principle is the same:

1. On the **Tasks** screen, click the task's title. The document opens directly at your step.
2. Review the content, the files, and the comments from earlier steps.
3. In the step window, choose the right action – for example, approve, or return to the previous step for correction. The names of the actions are set in your organization's settings.
4. Add a response or a comment if needed, and sign if a signature is required.
5. Save.

What happens next:

- **You approved** – the document moves to the next step, and the person responsible for it gets a new task.
- **You returned** – the task goes back to the person who handled the previous step, and **Step returned** is recorded in the task's history.
- Your task closes. In project documents, work logs, and field reports, it closes automatically after you respond. In checklists, it closes when you sign the step. A regular save without a signature doesn't close the task.

Full instructions for each module are in its own chapter: Checklists, Non-conformances, Tests, Work logs, Project documents, Field reports.

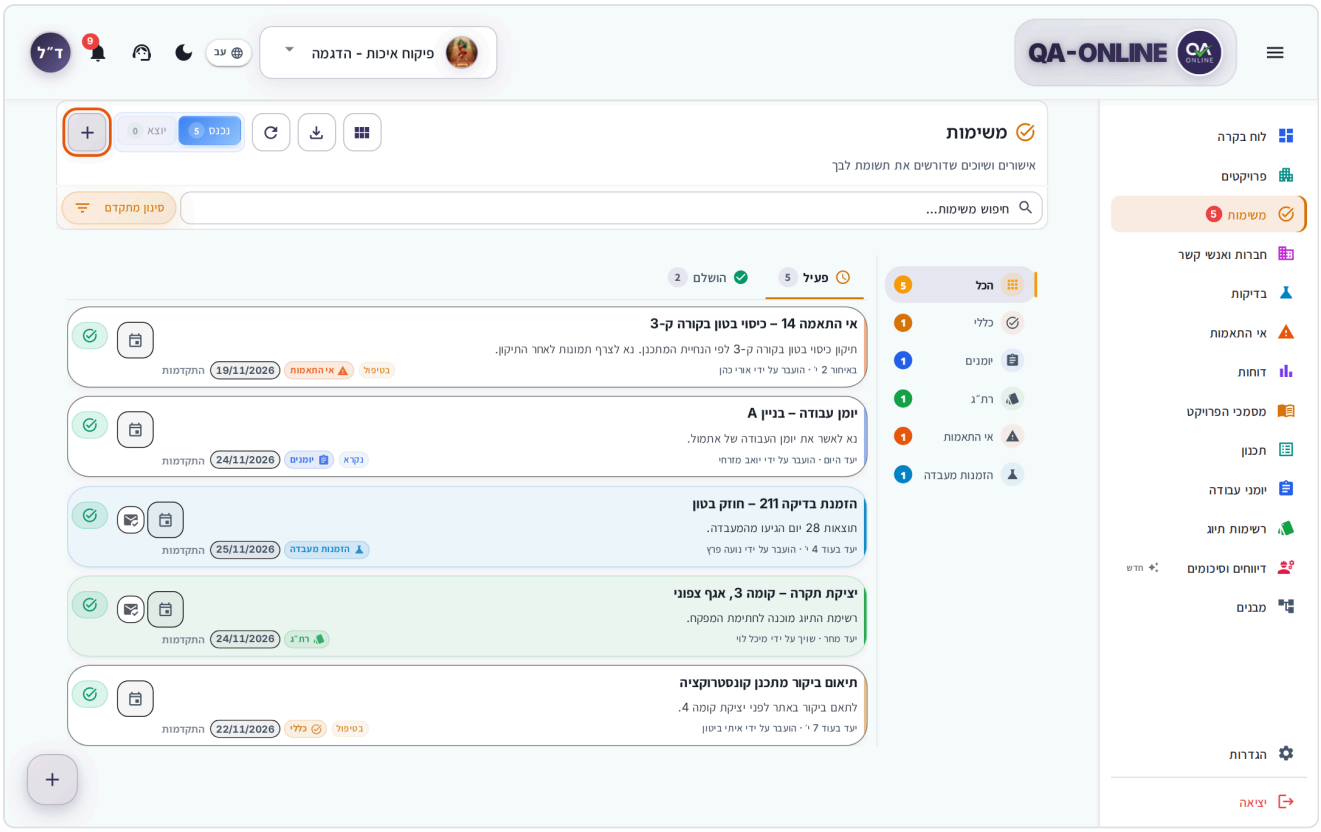
> **Note:** In non-conformances, tests, design, and structures, the task does **not** close on its own. After you finish handling the item, go back to the Tasks screen and click **Done**.

> **Tip:** Someone who receives a document **For your information** only doesn't get a task. They just get an update.

How to create a new task

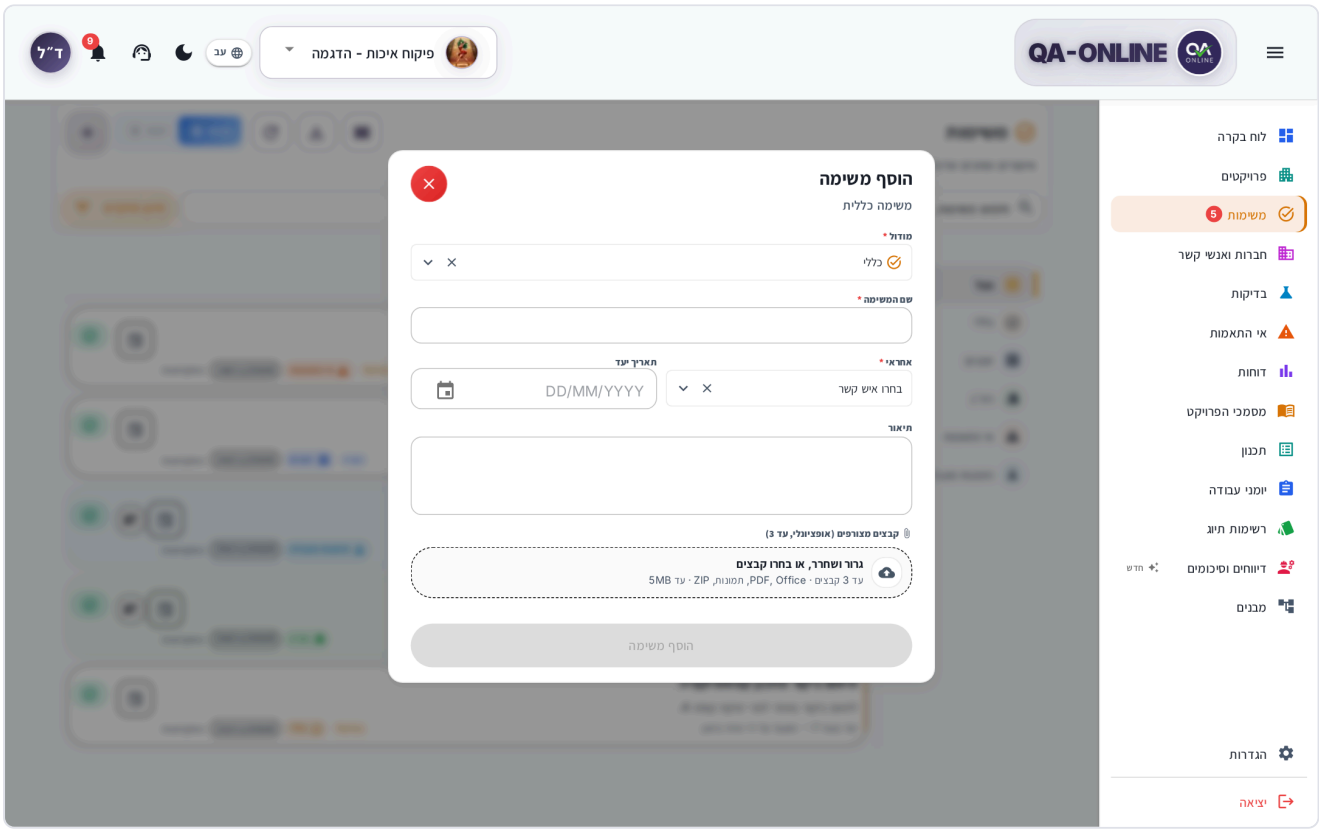
You can open a task for any contact in the project – either a general task or a task related to a specific item.

1. In the side menu, click **Tasks**, and in the screen header, click **+** (**Add task**). You can also use the floating button in the corner of the screen.



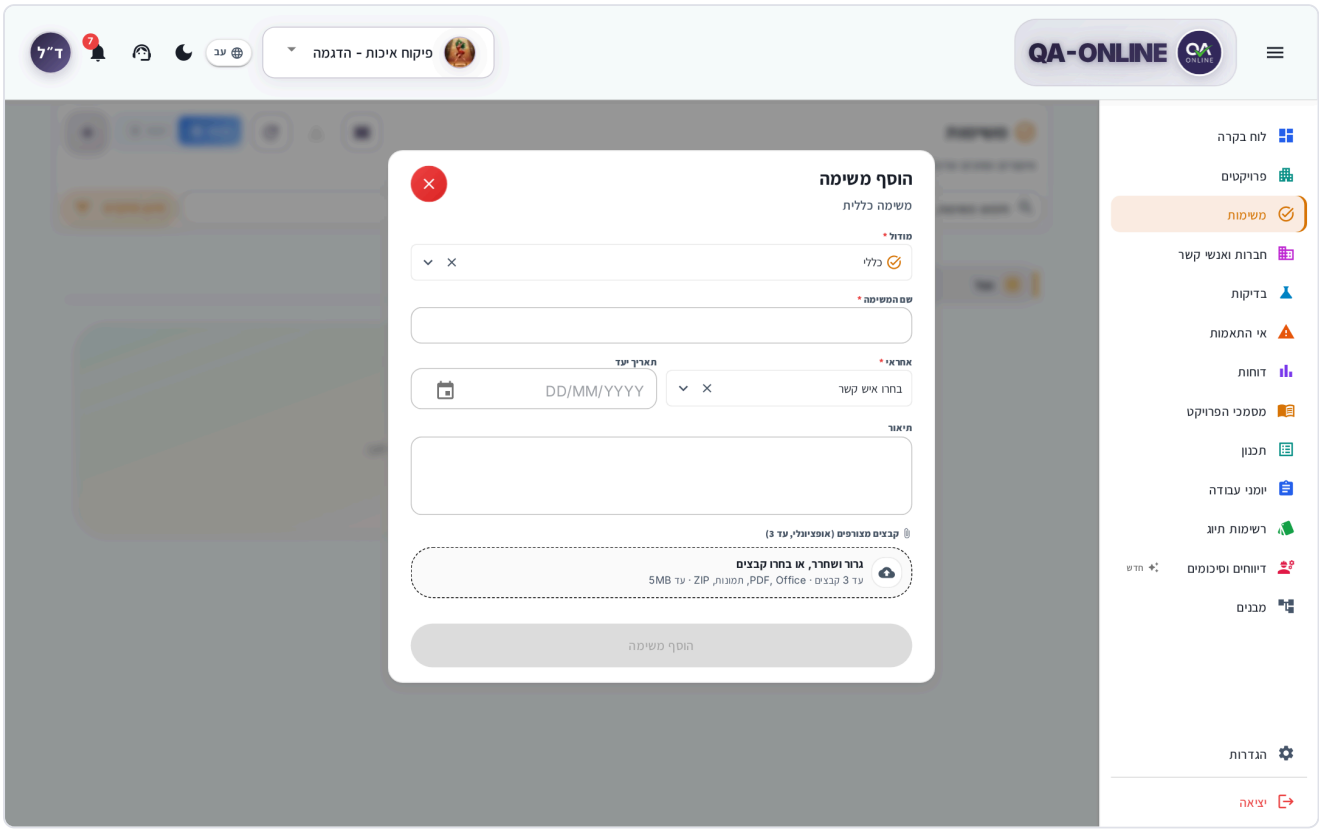
The Tasks screen, with the + button in the header highlighted

2. The **Add task** window opens. In **Module**, leave **General Task**, or choose a module to link the task to a specific item.



The empty Add task window, with the fields Module, Task title, Assignee, Due date, and Description

3. If you chose a module, choose a **Type** and then a **Code** (the item itself). In Design, you choose a **Drawing**; in orders, an **Order**; and in Structures, a **Location**.
4. Enter a **Task title** (required).
5. Choose an **Assignee** – the contact who'll receive the task (required).
6. If needed, choose a **Due date**, write a **Description**, and attach up to 3 files (up to 5MB each).



The completed Add task window – module, type, code, task title, assignee, due date, description, and files

7. Click **Add task**. You'll see the message **Task assigned**. The task appears in the assignee's **Incoming** box, and in your **Outgoing** box.

Who gets an email:

- **The assignee** – gets an email about the new task. If you assigned the task to yourself, no separate email is sent to you as the assignee.
- **You** – get a confirmation email for the task you opened.
- An email is sent only to people whose email address appears on their contact card.
- Editing or cancelling a task, and tasks created by an approval process, don't send an email.

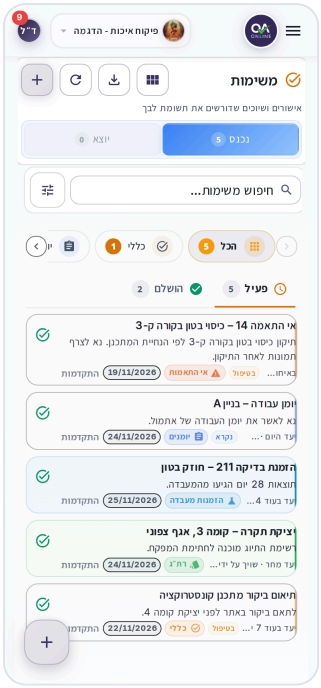
Other ways to open a task:

- **From a module** – in the actions menu of an item in a list (checklist, non-conformance, work log, document, report, test), choose **Add task**. The task is linked to the item automatically.
- **From the Dashboard** – click **+** in the **Requires your attention** section.
- **From the Messenger view** – choose a contact and click **New task**.

> **Don't see this option?** Permissions are set by your role in the project. If a module or button is missing, contact the project manager or your organization's system administrator.

On your phone

1. Tap the floating **+** button in the corner of the screen.
2. The **Add task** window opens over the list. Fill in the fields as you would on a computer, and tap **Add task**.



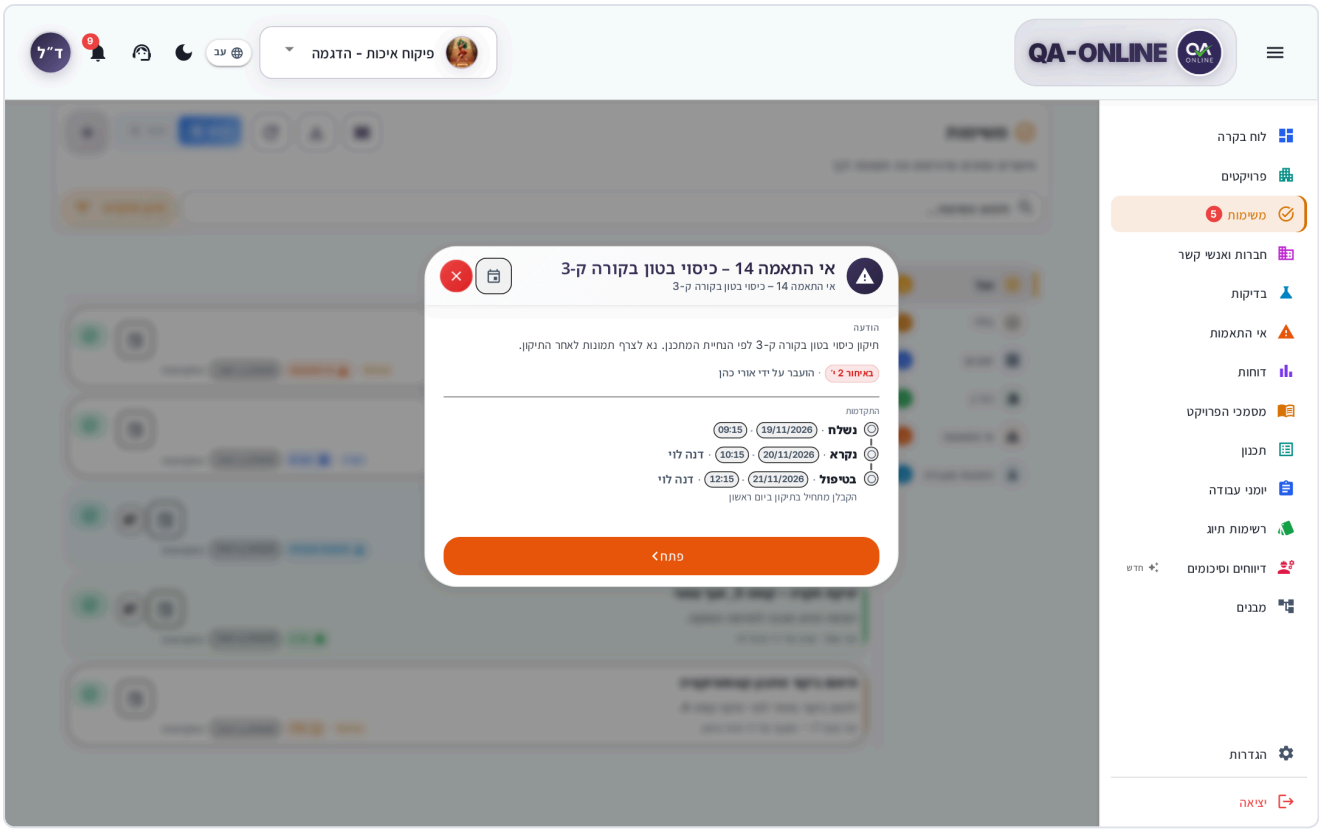
The Tasks screen on a phone – Incoming / Outgoing at full width, the Active / Done tabs, and the + button



The Add task window on a phone

How to handle an incoming task

1. In the side menu, click **Tasks**. Make sure **Incoming** and **Active** are selected.
2. Click the arrow on the side of the card to see the details: who sent it, the due date, the comments, and the progress.



An open task card – the document name, "Assigned by", due date, comments, and the "Progress" rail

3. Click the task's title. The document or record opens in the matching module, and the status changes to **In progress**.
4. Handle the item: approve, sign, fill in a response, or return it.
5. If the task didn't close on its own, go back to the Tasks screen and click **Done** on the card.

The item moves to the **Done** tab, and the message **Moved out of attention** appears. Click **Undo** right away if you clicked by mistake.

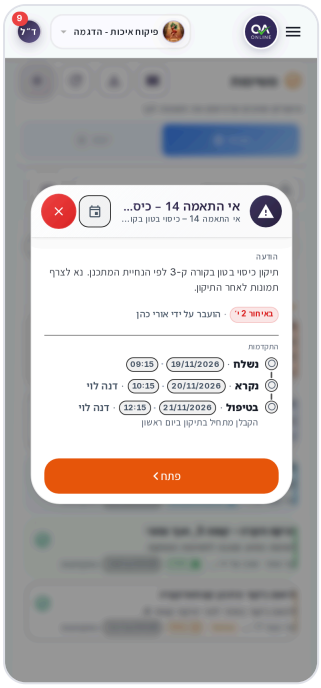
More actions appear on the side of the card, depending on the task type:

- **Mark as read** – marks that you've seen the task, without opening it. It appears only on unread tasks.
- **Mark in progress** – appears only on general tasks that aren't related to an item. It lets the sender know you've started working on it.
- **Add to calendar** – adds the task to your Google or Outlook calendar (see How to add a task to your calendar).

To change a task you sent, see How to reassign a task and How to cancel a task. Tasks don't have a duplicate action.

On your phone

Cards appear at full width (see the Tasks screen on a phone above). Tap the arrow on a card to open it, and tap the title to open the document. **Done** and the other actions appear in the open card.



An open task on a phone – the message, "Transferred by", the due date, the progress rail, and the Open button

How the screen is organized

Element	What it does
Incoming / **Outgoing**	**Incoming** – tasks waiting for you. **Outgoing** – tasks you sent to others, so you can follow them
Active / **Done**	Tabs above the list. **Active** – what's still open. **Done** – what's already been handled. A number appears next to each tab
Module list	**All**, **General**, **Project Documents**, **Work Logs**, **MOM**, **Checklists**, **Non Conformances**, **Design**, **Structures**, **Lab Orders**, **Survey Orders**
Search and filter	The **Search tasks…** box and **Advanced Filters** by date
Header buttons	View, export, **Refresh**, and **Add task** (**+**)

In **Incoming** → **Active**, overdue tasks appear first. They're followed by tasks due today, then tasks that are coming due, and then unread tasks.

What's on a task card

- **Document or item name** – for example, work log number 12 or a step in a checklist. The name appears at the top of the card.
- **Who sent it** – **Transferred by …** or **Assigned by …**. In Outgoing, you'll see **Sent to …**.
- **Due date** – if one was set: **Overdue 3d**, **Due today**, **Due in 1d**, or **Due in 5d**.

- **Comments or message** – always shown on the card. When you open the card, you see the full text.
- **Attachments** – a paperclip icon and the number of files. When you open the card, you can click **Preview** or **Download**.
- **Progress** – a chip with the current status.

An unread task is marked with a colored stripe on the side of the card.

Progress statuses

Status	What it means
Sent	The task was created, and the recipient hasn't opened it yet
Read	The recipient has seen the task
In progress	The recipient opened the document from the task, or selected **Mark in progress**
Done	The task was handled – automatically, or by clicking **Done**
Cancelled	The sender cancelled the task

How to see a task's history

1. Click the arrow on the side of the card or click **Progress**.
2. The **Progress** rail opens, with all the steps, the dates, and who performed each action. For example: **Reassigned by** Yossi **to** Dana, **Step returned**, **Task updated**, or **Reopened**.

The history is available in both the **Incoming** and **Outgoing** boxes. It's the easiest way to check whether someone has already opened what you sent.

More actions on incoming tasks

How to mark all tasks done or read

1. In **Incoming** → **Active**, in the **Cards** view, choose a module in the module list (or **All**).
2. At the end of the filter bar, click the **Mark all done** icon or the **Mark all read** icon.
3. A message such as "12 moved out of attention" appears. Click **Undo** right away if you clicked by mistake.

> **Note:** Both actions apply to all the active incoming tasks in the module you chose – including tasks that your search or date filter is currently hiding. **Mark all read** appears only when there are unread tasks. In the **Calendar** and **Messenger** views, the buttons aren't shown.

How to restore a task you closed

1. In the **Incoming** box, go to the **Done** tab.

2. On the task's card, click **Restore**.
3. The task returns to the **Active** tab, and the message **Restored to active tasks** appears.

Tasks with a non-conformance closing date

If you opened a non-conformance that has an **Expected closing date**, it appears in **Incoming** when the date has passed, when it's today, or when it's up to 14 days away. Tasks like this disappear on their own when the non-conformance is closed or when you change the date. They don't have a **Done** button.

How to track tasks you sent

1. On the **Tasks** screen, choose **Outgoing**.
2. The **Active** tab shows tasks that aren't completed yet. The **Done** tab shows tasks that the recipient finished.
3. The progress chip shows where each task stands (**Sent**, **Read**, **In progress**).
4. To see the document itself, click **Open**. Opening it yourself doesn't change the recipient's status.

How to reassign a task

You can edit a task you opened for as long as it's active:

1. Choose **Outgoing** → **Active**.
2. On the task's card, click the edit icon (**Edit task**).
3. Change the **Assignee** (and the title, description, or files too, if needed).
4. Click **Save**.

The task moves to the new assignee and leaves the previous assignee's box. The history records **Reassigned by … to …**.

For tasks created by a process – for example, a step in a checklist – the transfer is done inside the module: you change the person responsible for the step, and the task moves automatically. If you remove the person responsible, the task closes for them.

How to cancel a task

1. Choose **Outgoing** → **Active** and click **Edit task**.
2. Click **Cancel task**.
3. In the **Cancel this task?** window, confirm the cancellation.

The task is marked as done for the recipient and cancelled for you. In the **Done** tab, it appears with the **Cancelled** chip.

> **Note:** You can edit and cancel only tasks that you opened yourself in the **Add task** window. Tasks created by an approval process are managed from the document itself.

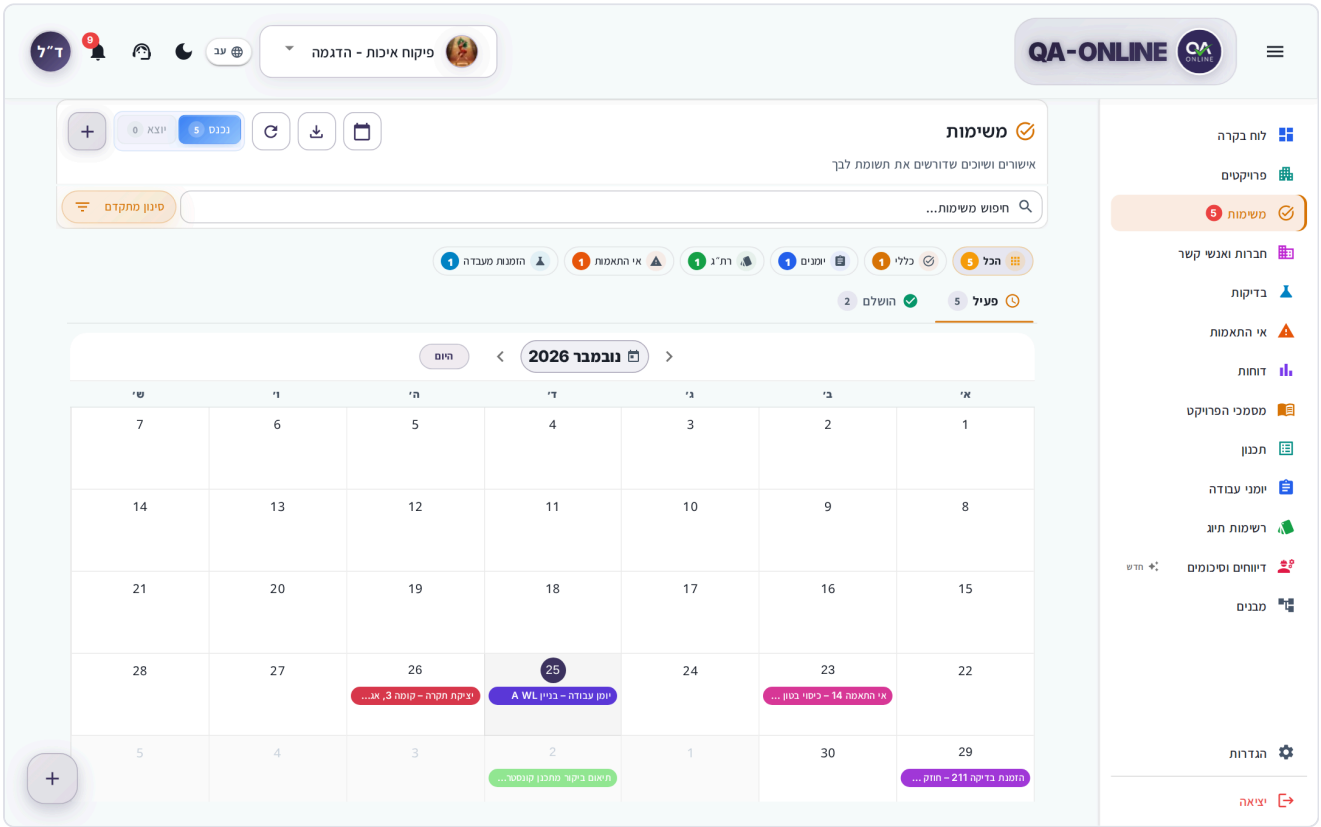
How to search and filter tasks

- **Search** – type in the **Search tasks…** box.
- **Module** – click a module in the module list. To see everything, click **All**.
- **Dates** – click **Advanced Filters** and choose **From** and **To**. The filter uses the task's due date, and if it has no due date, the date it was sent. Each date you choose appears as a chip, and you can clear each one separately or click **Clear all**.
- **Clearing** – if no results are found, the message **No matching tasks** appears. Click **Clear filters**.

Views: cards, calendar, and messenger

Click the view button in the header and choose:

View	When to use it
Cards	The default: a list by module
Calendar	A monthly calendar. Tasks are shown by their due date (or by the date they were sent, if there's no due date). Click a task to open it, or click a day to see all the tasks on it
Messenger	Tasks are grouped by contact, with incoming and outgoing together, like a conversation. You can search for a contact in the **Search contacts…** box



The "Calendar" view on the Tasks screen, with tasks on their dates

> **Tip:** In the **Messenger** view, there's no choice between **Incoming** and **Outgoing**, because each conversation shows both directions. The **Messenger** view is available on computers only. The **Calendar** view isn't saved – the next time you sign in, the screen opens in Cards again.

How to add a task to your calendar

1. On the task's card, click the calendar icon (**Add to calendar**).
2. In the **Add to calendar** window, choose **Google** or **Outlook**.
3. Choose a **Date**. The event is added as an all-day event.
4. Click **Add to Google Calendar** or **Add to Outlook**.
5. Confirm the event in the calendar app that opens.

The event includes the project name, the module, the task details, and a link that opens the item in QA-Online.

Where the button appears: on task cards in the **Active** tab (in both **Incoming** and **Outgoing**), on cards in the day window of the **Calendar** view, and in an open task bubble in the **Messenger** view. It doesn't appear in the **Done** tab. On the Dashboard, it appears only after you open the task details. The **Add to calendar** option is also in the actions menu of items in the module lists.

The Tasks column in module lists

In the lists for checklists, non-conformances, tests, work logs, project documents, and field reports (in table view), there's a column named **Tasks**. It shows how many open tasks each item has, and how many of them are unread.

1. Click the number in the column. The **Open tasks** window opens.
2. Click a task to see its details. If the task is assigned to you, it's marked as read.
3. Click the **Open** button followed by the module name to open the item. For a task that isn't related to an item, you'll see **View tasks**, which takes you to the Tasks screen: to the **Incoming** box if the task is assigned to you, or to **Outgoing** if you sent it. The card appears open and highlighted.
4. To return to the task list in the window, click **Back to list**.

> **Tip:** In some lists, you can filter by **Has open tasks** or **No open tasks**.

Notifications for new tasks

- **Pop-up window** – when a new task arrives, a window opens with a headline such as **… needs your review** or **… assigned you a task**. The window shows the document name, the due date, and a short explanation of what to do. Click **Open in …** (the module name) to handle it right away, or **View in Tasks**. If several tasks arrived, move between them with **Previous** and **Next**.

- **Task in a different project** – the text "This is in … . We'll switch you there when you open it." appears. The project switches automatically.
- **Notification bell** – in the top bar. It shows your active tasks, as well as overdue lab and survey orders and supplier approvals that have expired. Click **Mark all as read** or **View all notifications**.
- **Email** – only when someone opens a new task for you in the **Add task** window (see How to create a new task).

> **Note:** If you see the message "This task's record couldn't be opened. It may have been removed, or you don't have access.", click **View task** to return to the card. If needed, contact the sender.

How to export the tasks list

1. Click the download icon in the header (**Export tasks as PDF or Excel**).
2. Choose **PDF** or **Excel**.
3. The file is created in the background. It includes exactly what's currently shown: the box, the tab, the module, the search, and the dates, along with the progress history of each task. In Excel, the history appears on a separate sheet named **Progress**.

If the list is empty, the button isn't available. For preview and download, see Shared tools.

On your phone

- The choice between **Incoming** and **Outgoing** appears at full width below the header, and the **Active** / **Done** tabs appear above the cards.
- To create a task, tap the floating **+** button.
- Tapping the details row on a card opens the progress. Tapping the title opens the document.
- In the **Calendar** view, tap a day to see its tasks.
- The **Messenger** view isn't available on phones.
- The notification bell is in the user menu (your profile picture), along with the number of unread notifications.
- In the app, you'll get a push notification for a new task, with the buttons **Go to Task** and **All Tasks**.
- **Add to calendar** opens your phone's calendar app.

Frequently asked questions

I approved the document, but the task still shows under "Active". Why? In non-conformances, tests, design, and structures, you need to click **Done** yourself. In checklists, the task closes only after you sign the step, not after a regular save.

How do I know whether the person I sent a task to has already seen it? Choose **Outgoing** and check the progress chip: **Read** means the recipient has seen the task, and **In progress** means they opened the document.

What's the difference between Tasks and the notification bell? The **Tasks** screen gathers everything you need to handle, and keeps it until you finish. The bell is a quick summary, and it also includes general notifications such as overdue orders.

I clicked "Mark all done" while a search was active, and other tasks were closed too. Mark all done applies to all the active tasks in the module you chose, regardless of the search. Click **Undo** in the message, or restore individual tasks from the **Done** tab.

I closed a task by mistake. Click **Undo** in the message that appears right after you close it. If the message is already gone, go to the **Done** tab and click **Restore**.

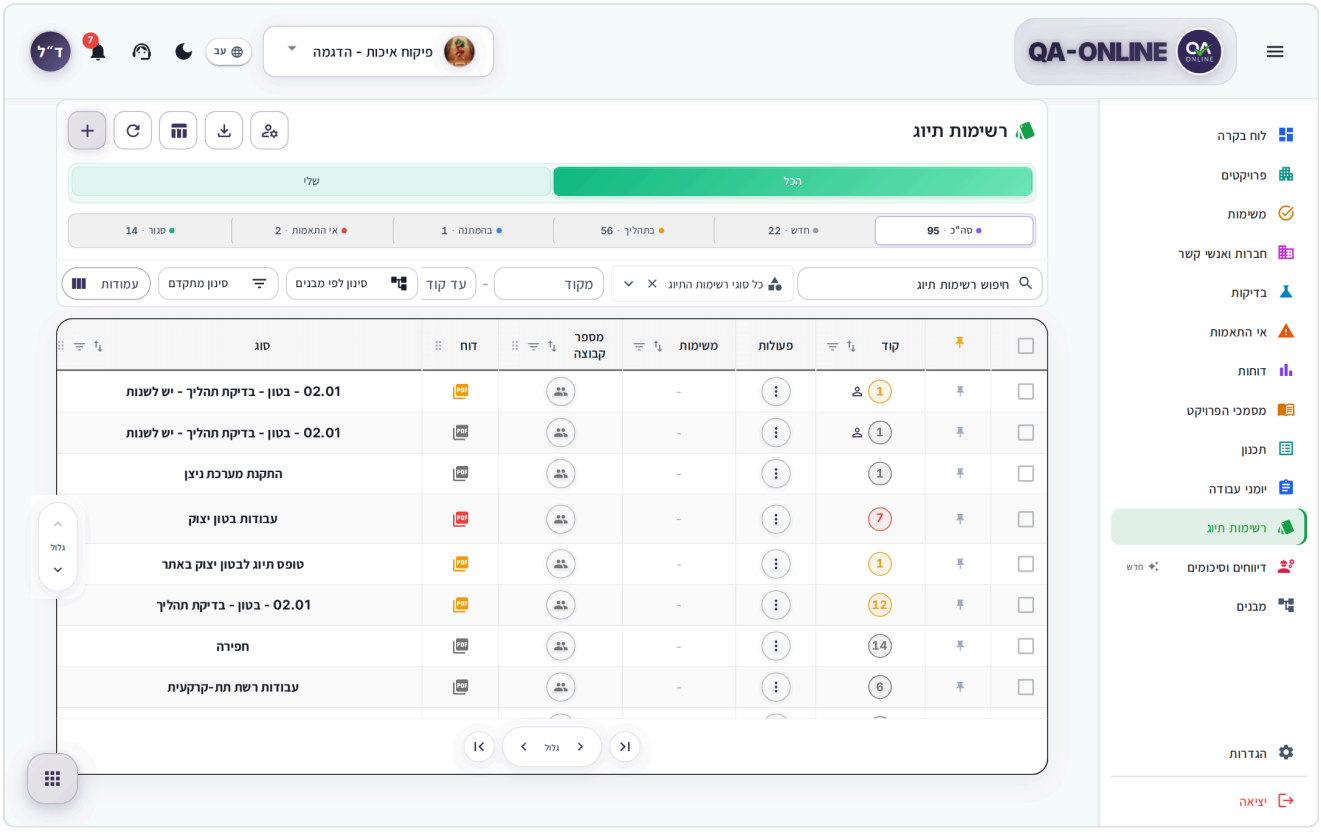
See also

- Dashboard and projects – a summary of your tasks in the **Requires your attention** section.
- Checklists – assigning steps and signing, which closes the task.
- Shared tools – export, preview, and download.
- Using phones and tablets – push notifications and fieldwork.

Checklists

Step-by-step control over work on site – filling in, signing, and approving each step until the checklist is closed.

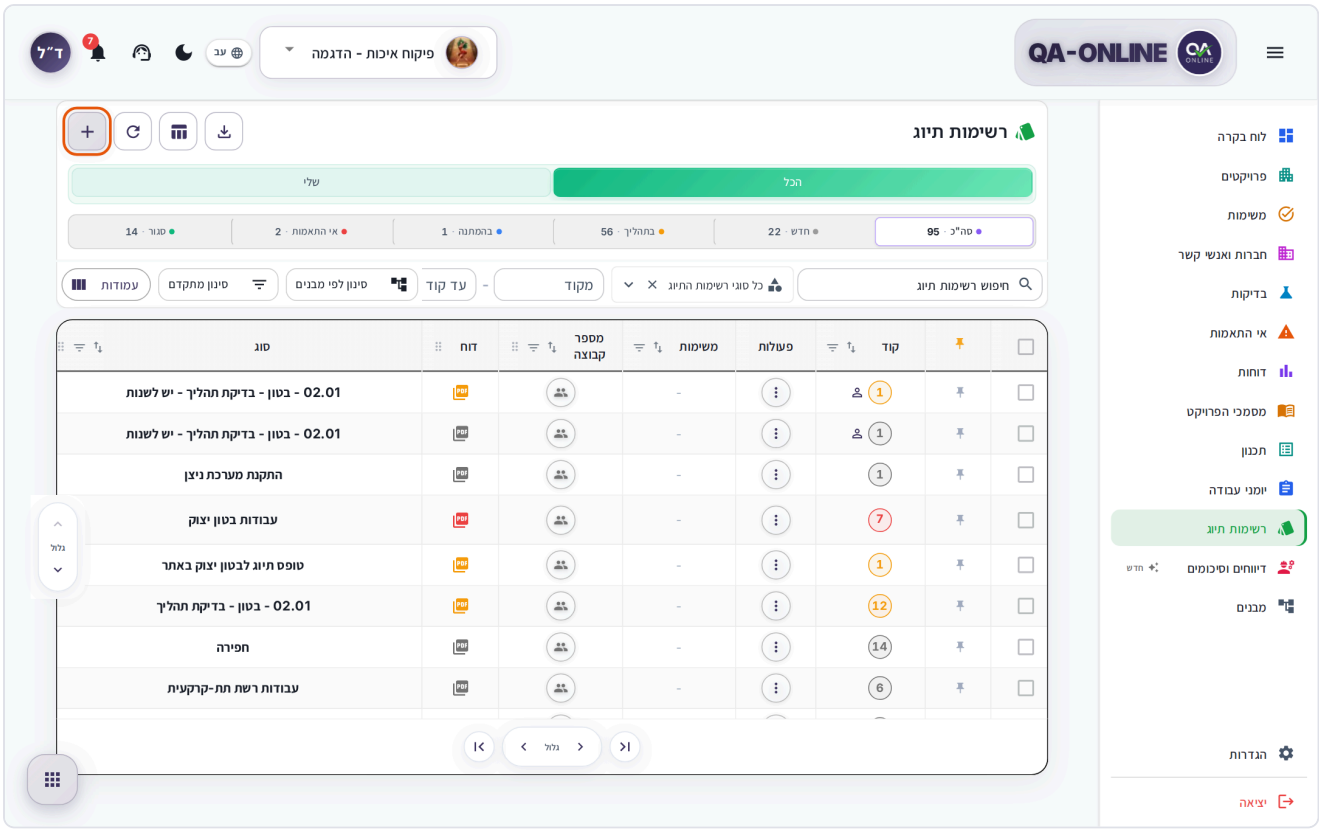
A checklist accompanies a specific piece of work on site, such as pouring a slab or waterproofing a wet room. Each checklist is built from a type (template) that's defined in the project, and it's divided into categories and steps – for example, preliminary inspection, ongoing inspection, and final approval. Site managers, inspectors, and quality control staff fill in the steps they're responsible for, attach photos, and sign. When all the required steps are signed, the checklist closes.



The Checklists screen in table view

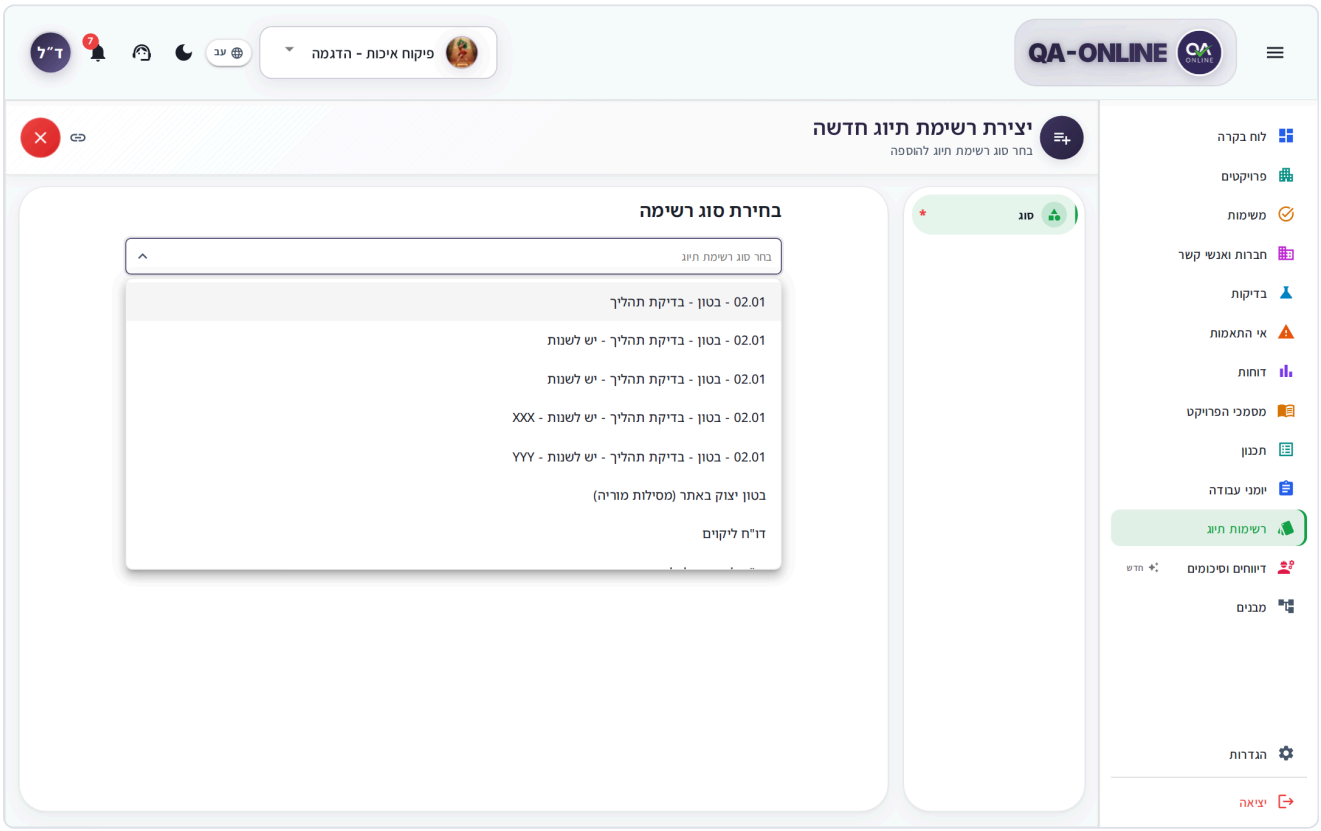
How to create a new checklist

1. Select the project in the Project selector, and in the side menu, click **Checklists**.
2. At the top of the screen, click **+** (**Create new checklist**).



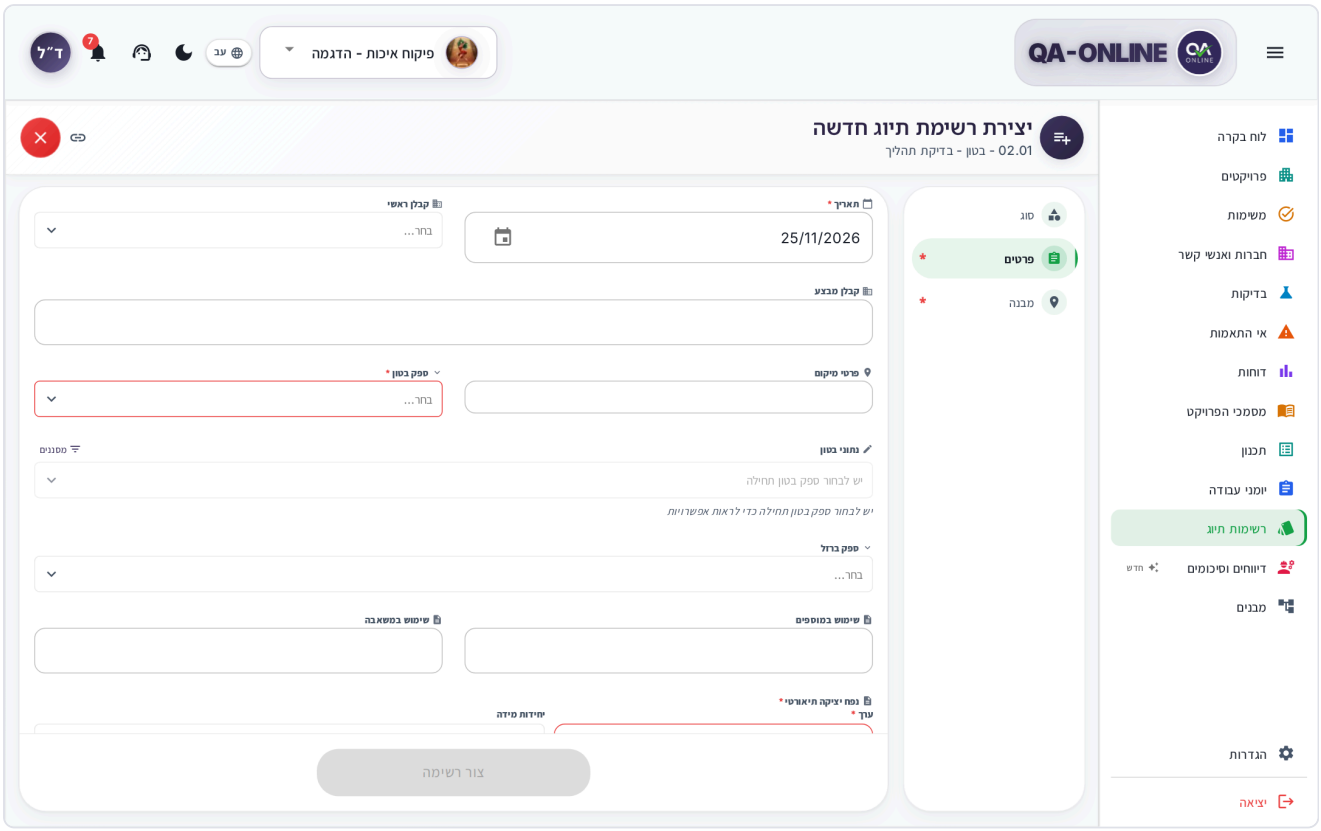
The Checklists screen, with the + button at the top of the screen highlighted

3. The **Create New Checklist** window opens. In the **Type** section, open **Checklist type** and choose the template, for example, floor pour. The type determines which fields and steps the checklist has.



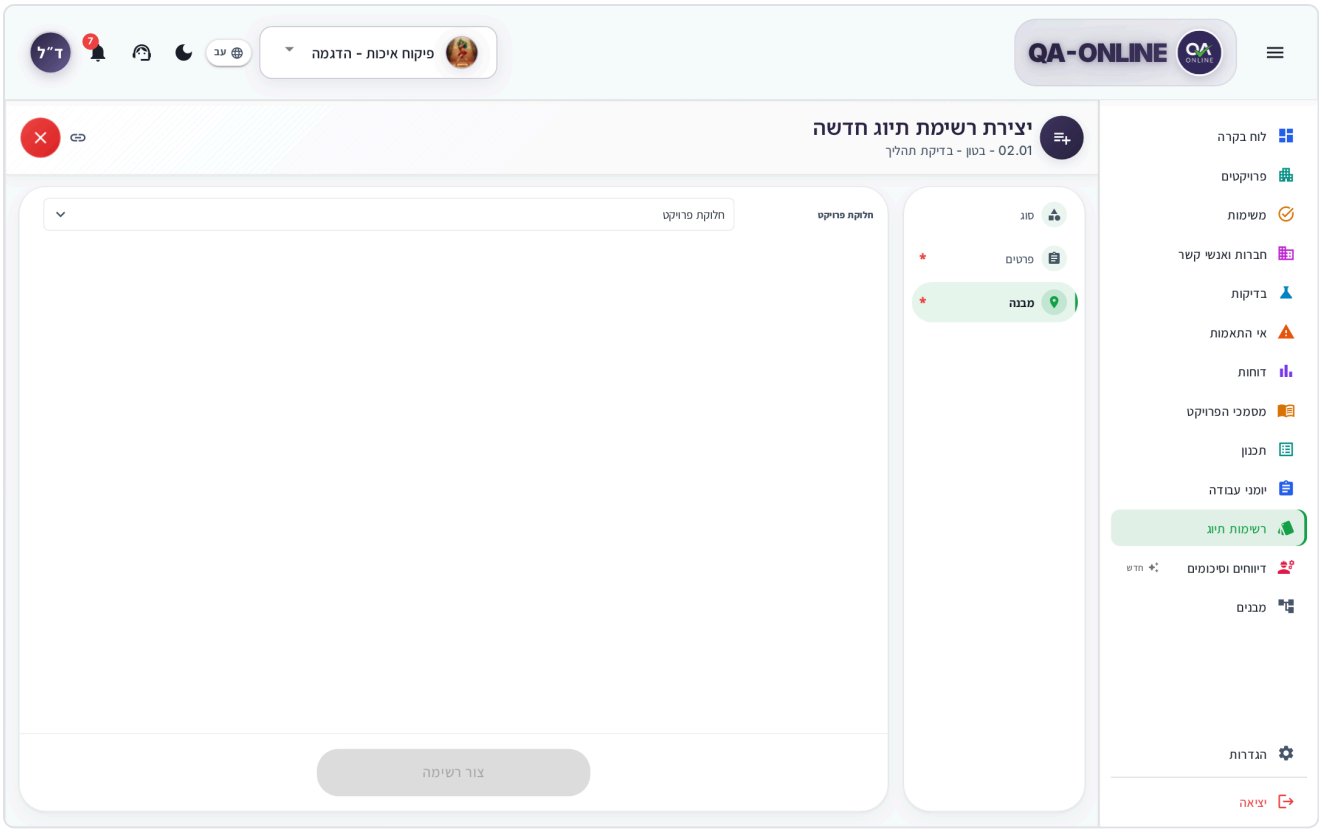
The Create New Checklist window, with the list of types open

4. In the **Details** section, fill in the fields in order: **Date**, the contractors (for example, **Main Contractor** and **Executing contractor**), **Location details**, and the other fields of the type. Required fields are marked with an asterisk, and the **Create Checklist** button stays gray until they're all filled in.



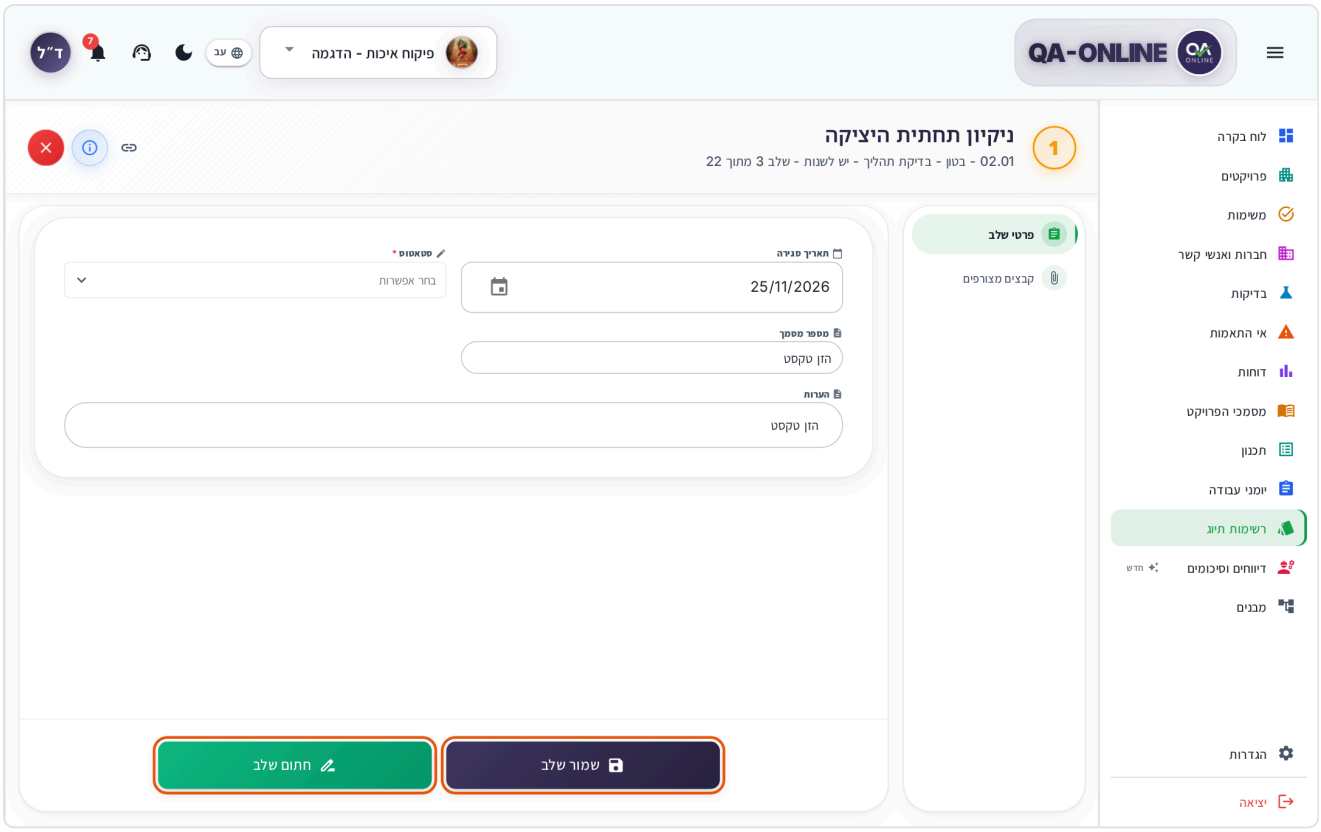
The Details section of the create window, with date, contractors, and location details

5. In the **Structure** section, choose the location: the **Sub-project** (project partition), followed by the structure, structure part, and element. For an explanation of the location picker, see Shared tools.



The Structure section of the create window, with the project partition selection

6. Click **Create Checklist**.
7. In the **Checklist Created Successfully!** message, click **Go to Checklist**. The detail window of the new checklist opens.
8. Click the card of the first step. In the step window, fill in the fields (status, comments, document number – depending on the step).
9. Click **Save Step** to save a draft, or **Sign Step** to sign and close the step. For details, see How to fill in a step and How to sign a step.



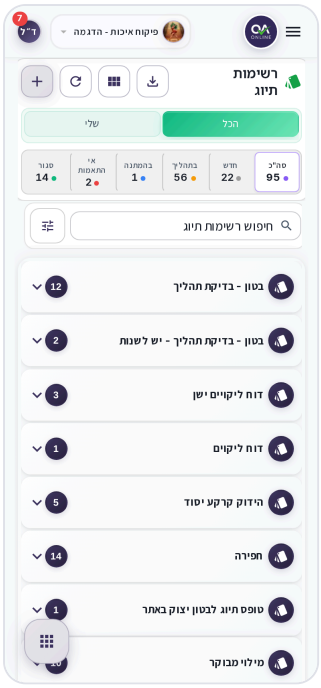
An open step window before signing, with the Save Step and Sign Step buttons highlighted

Tip: Next to each section in the window's menu, a marker appears when required fields are missing in it.

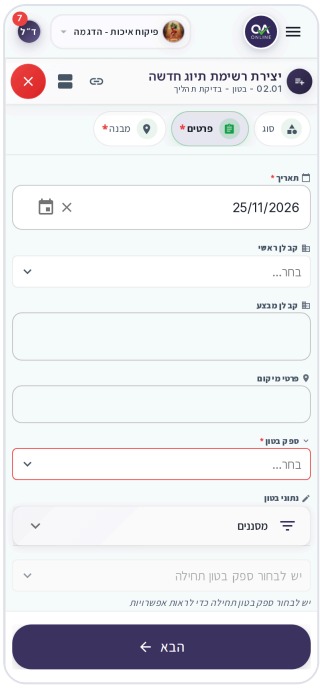
Don't see the create button? Creating checklists requires permission. Contact the project manager.

On your phone

1. In the list, tap the floating **+** button in the corner of the screen.
2. The window opens full screen. Tap **Checklist type**, choose a type, and move between the sections with the **Next** button at the bottom. In the last section, it becomes **Create Checklist**.



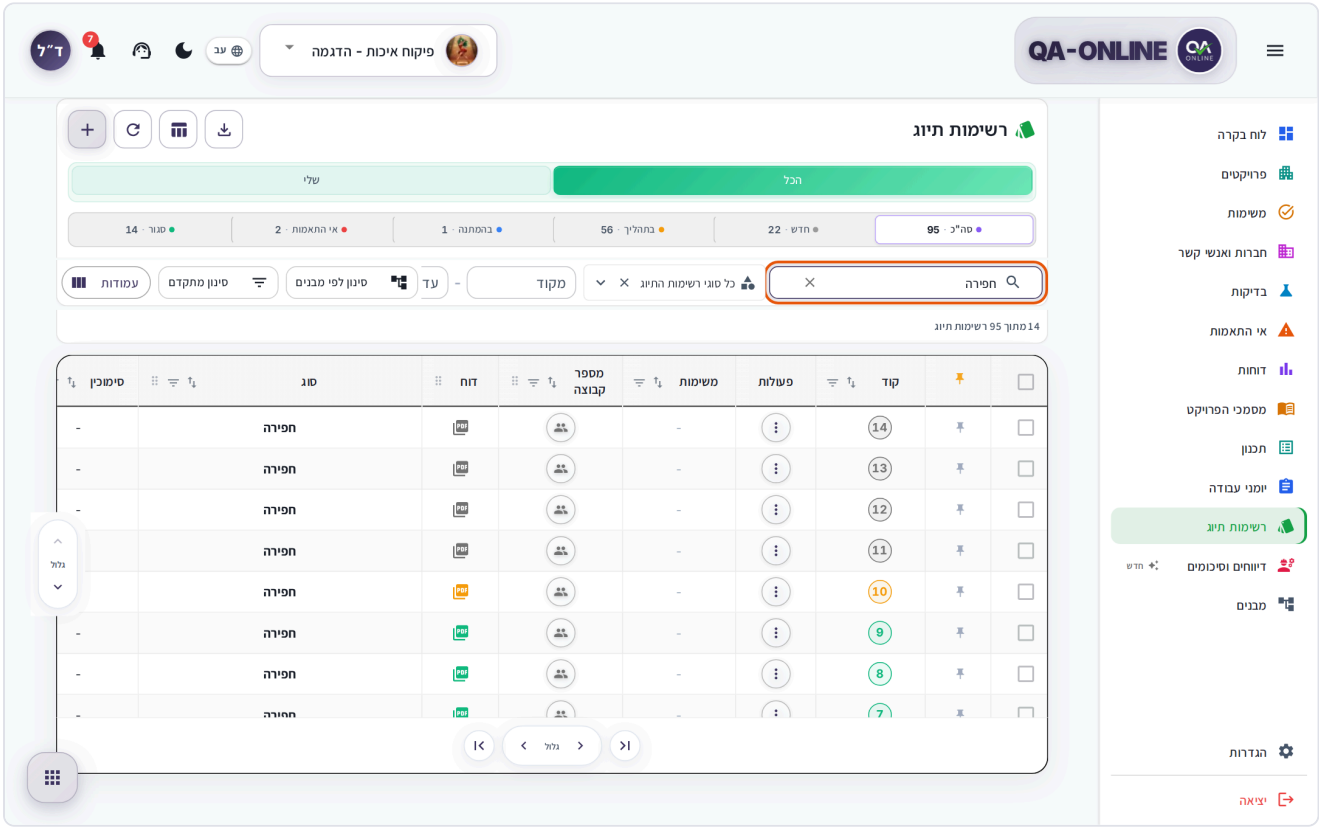
Checklists on a phone, with cards grouped by type



The create checklist window on a phone

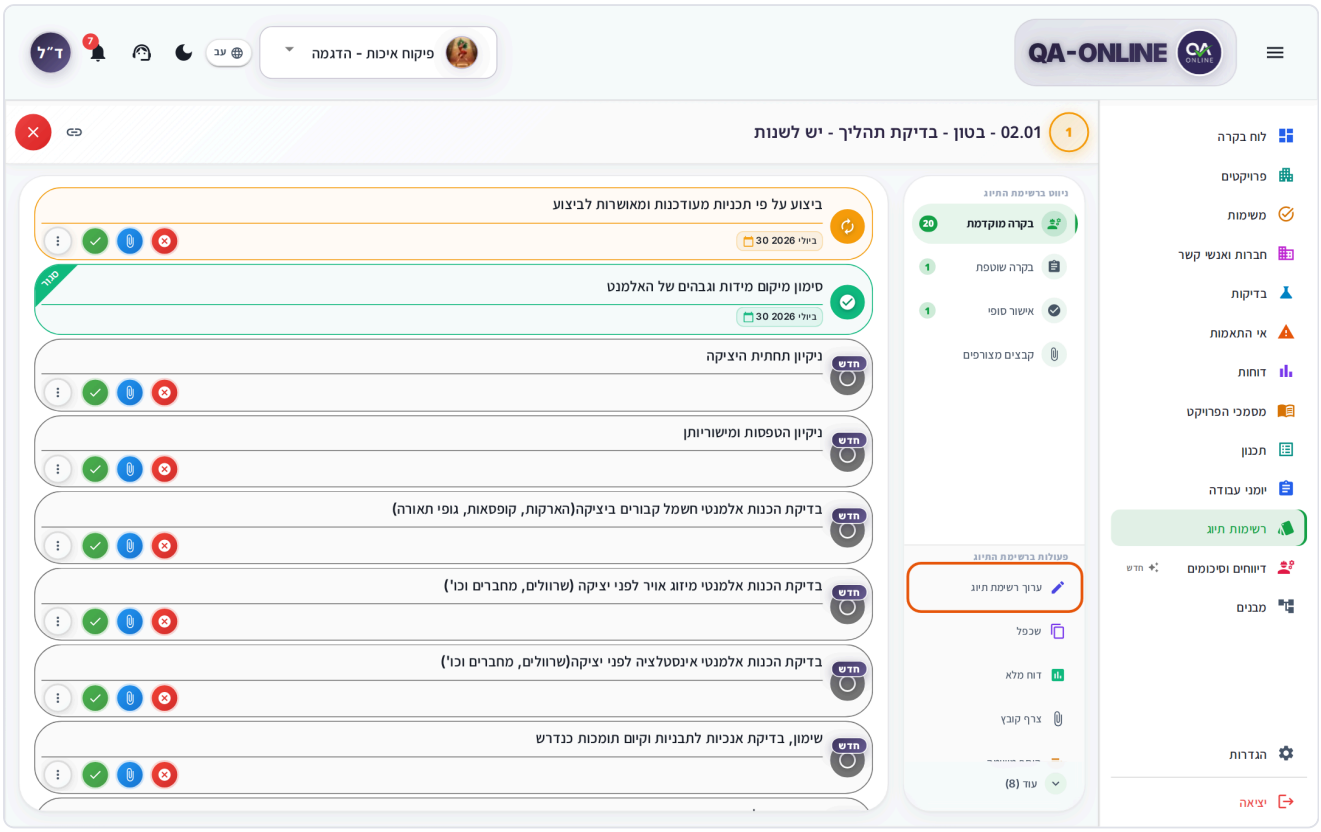
How to edit an existing checklist

1. In the **Search checklists** field, type a word from the type, from the location, or the code.



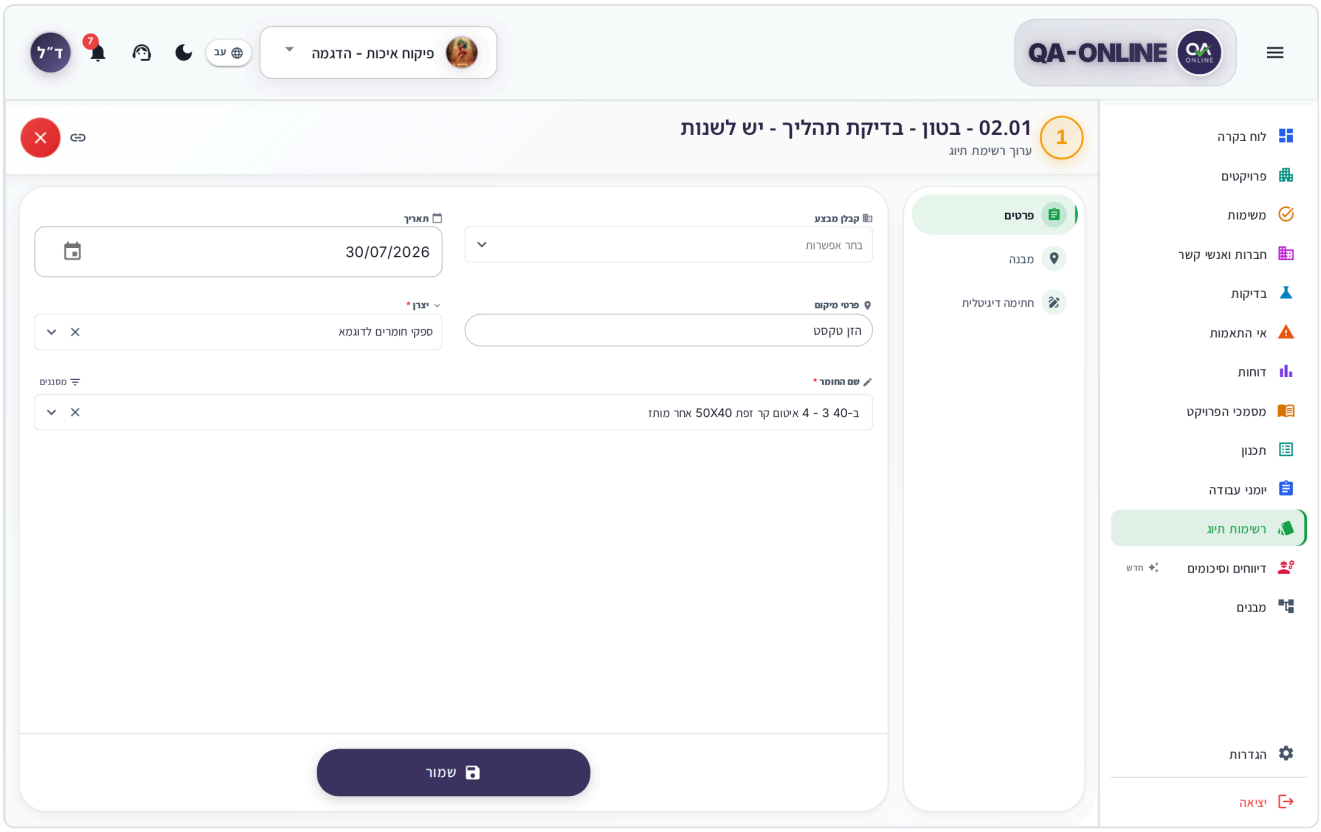
The search field in Checklists with the word excavation typed in, and the filtered list

2. Click the row (or the card). The **Checklist Details** window opens, with the categories on the side and a card for each step.
3. In the actions bar on the side of the window, click **Edit Checklist**.



The Checklist Details window, with the Edit Checklist button highlighted

4. In the window (the subtitle is **Edit Checklist**), change what you need in the **Details**, **Structure**, and **Digital Signature** sections. The fields show the current values.



The edit checklist window with the current fields and the Save button

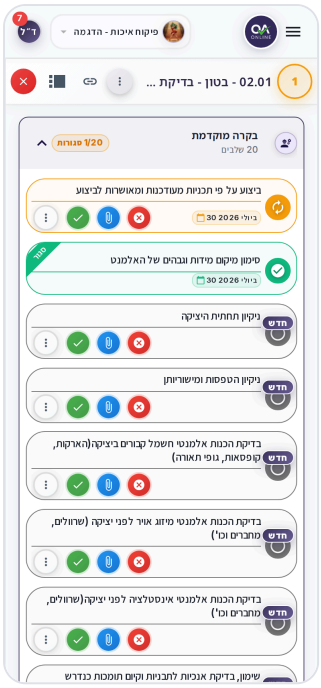
5. Click **Save**. The message **Checklist updated successfully** appears, and the new values are shown in the list.
6. To change a step: go back to the detail window, click the step's card, change the fields, and click **Save Step** (as in steps 8–9 of creating a checklist). A step that's already signed must first be reopened.

> **Note:** In **All**, another user's checklist opens as a **Full Report** (a read-only PDF), not for editing. You open your own checklists from **Mine**.

> **Don't see this option?** **Edit Checklist** appears only for people with edit permission. Contact the project manager.

On your phone

Tap the type group to open it, and then tap the checklist's card. The detail window opens full screen, and the steps appear as cards with quick action buttons. You open **Edit Checklist** and the other actions from the three-dot button at the top of the window.

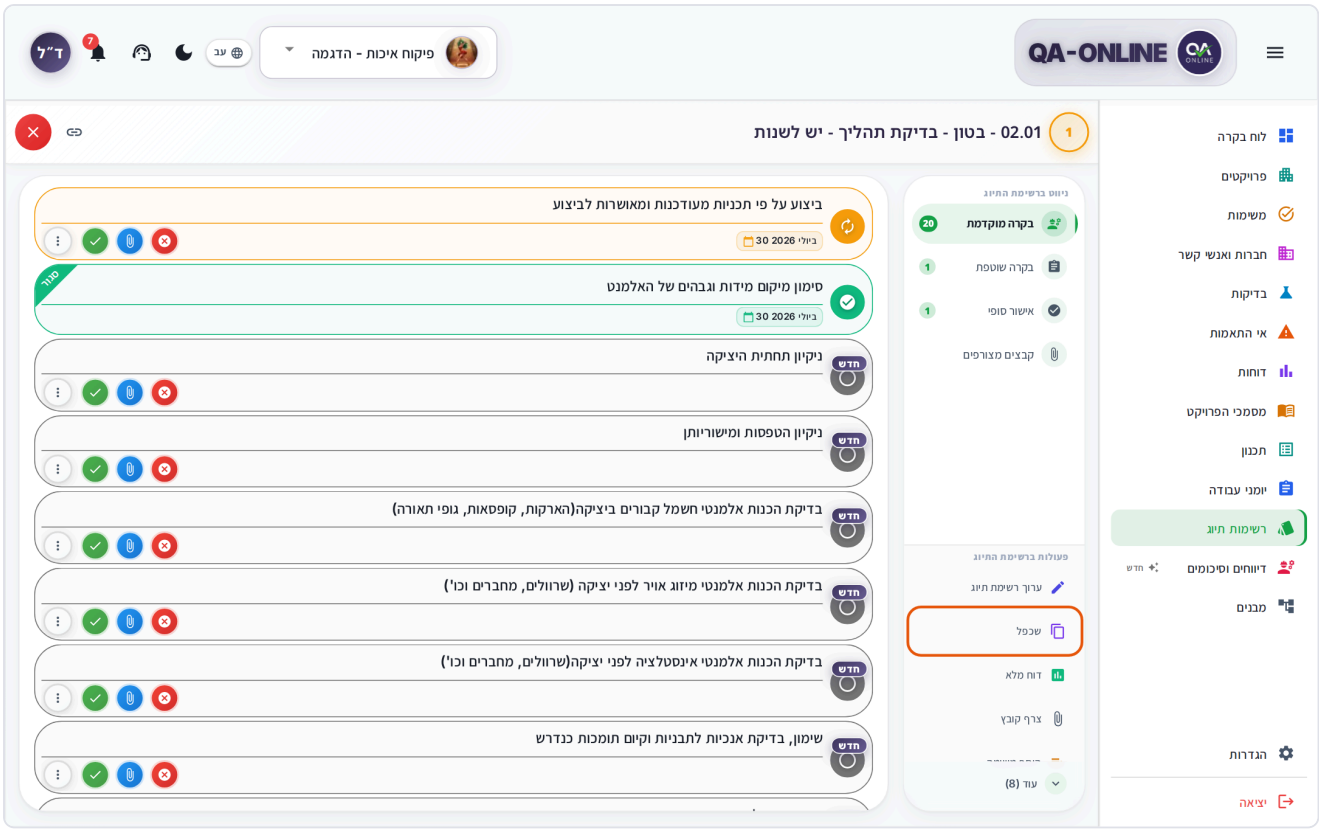


An open checklist on a phone, with the step cards

How to duplicate a checklist

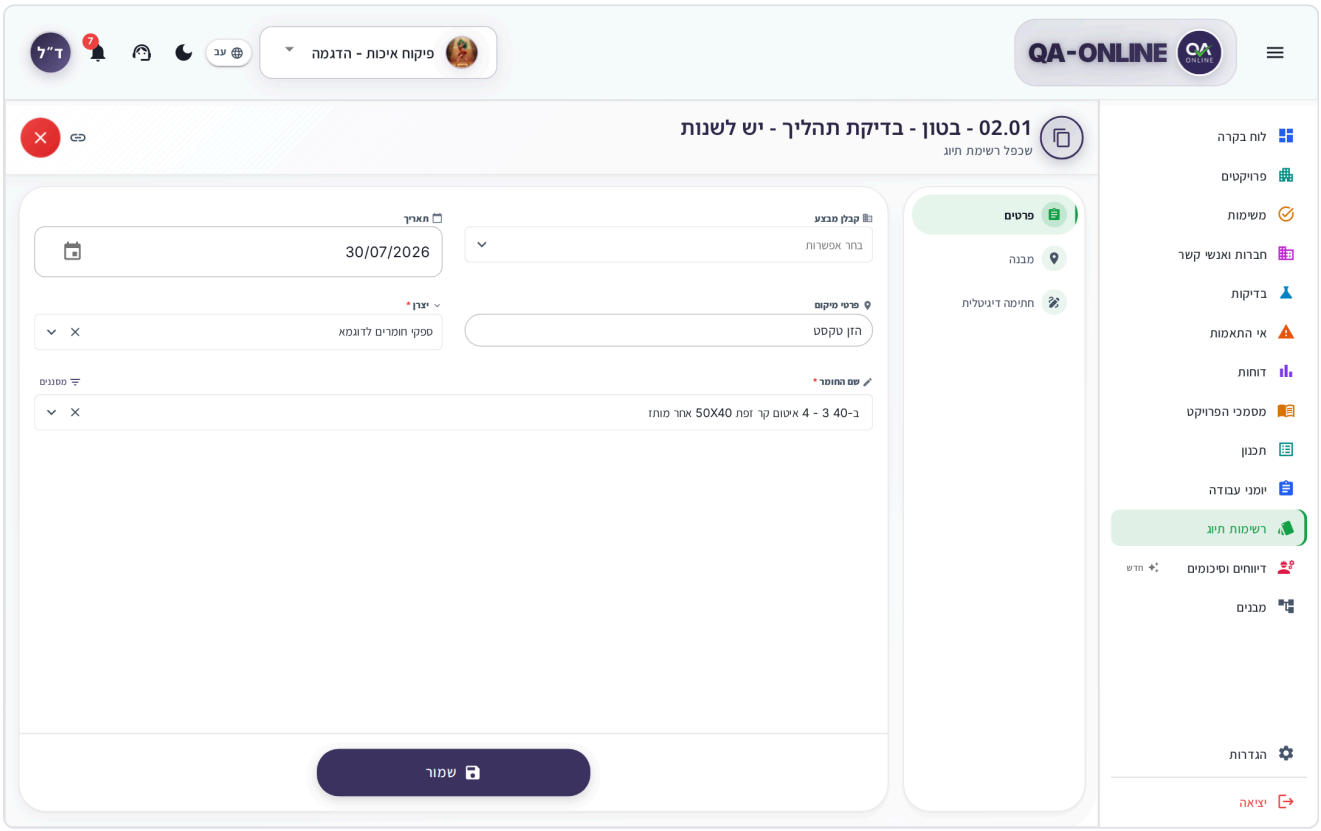
Duplicating saves typing when you need another checklist of the same type, for example, the same pour on a different floor.

1. Open the original checklist (see steps 1–2 under editing).
2. In the actions bar on the side of the window, click **Duplicate**. (You can also use the three-dot menu on the card.)



The Checklist Details window, with the Duplicate button highlighted

3. A window opens with the subtitle **Duplicate Checklist**. All the fields are already filled in from the original checklist.



The Duplicate Checklist window, with the fields copied from the original

4. Change what makes the new checklist different – usually the **Date** and the location in the **Structure** section.
5. Click **Save**. The message **Checklist duplicated successfully** appears, and the new checklist opens.

What's copied and what isn't:

- Copied: the type, the fields in the **Details** section, the location, and the **Digital Signature** settings.
- Not copied: the filled-in steps and the signatures on them. The new checklist gets a new code and starts with all the steps open, with the status **New**.

On your phone

In the open checklist window, tap the three dots at the top of the window and choose **Duplicate**. The rest is the same as on a computer.

What you see on the screen

In the Side menu, click **Checklists**. At the top of the screen, you'll see the title **Checklists**, with a scope toggle below it:

- **All** – all the checklists in the project. This is the screen that opens by default.
- **Mine** – the checklists assigned to you.

The screen remembers the last scope you chose. The search, the checklist type, and the status are kept when you switch between **All** and **Mine**.

> **Tip:** In the grouped menu, you can open the arrow next to **Checklists** and go directly to **Project Checklists**, **My Checklists**, or (for administrators) **Checklists management**.

> **Don't see the toggle?** If you have permission for only one of the scopes, the toggle isn't shown and you see only the checklists you're allowed to see.

Beside the title, there are buttons: the view mode, export (a download arrow), **Refresh**, and a button for creating a **New checklist**. Authorized administrators also see the **Checklists management** icon.

Status counters

Below the toggle, there's a row of counters. Clicking a counter shows only the checklists with that status. Clicking it again (or clicking **Total**) removes the filter.

Counter	What it shows
Total	All the checklists
New	Checklists that no one has started working on yet

Counter	What it shows
In progress	Checklists in which some of the steps have already been filled in
Pending	Checklists that are waiting for an outside party, for example, for lab results
NC	Checklists in which one of the steps was closed as a non-conformance
Closed	Checklists that have been completed
Other	Checklists with another status, for example, canceled. The counter appears only when there are such checklists

View modes

- **Table** – a row for each checklist, with columns such as code, type, status, user name, opening date, and location (on computers only).
- **Cards** – a card for each checklist. The checklists are grouped by type, and each type opens and closes when you click its header.
- **Calendar** – the checklists are arranged by date.

On a phone, the **Cards** and **Calendar** views are available.

> **Tip:** In table view, click **Columns** to choose which columns are shown, and drag a column header to change the order. The setting is saved separately for **All** and **Mine**.

When the list is empty or doesn't load

- In **Mine**, you'll see **You don't have checklists yet in this project**. Click **Go to all project checklists** to see all the checklists.
- In **All**, you'll see **No checklists yet in this project**. If you have create permission, click **Create your first checklist**.
- If no project is selected, you'll see **Please select a project to view checklists.** Choose a project in the Project selector.
- If the filters return no results, you'll see **No results match your filters**. Click **Clear filters**.
- If loading failed, you'll see **Unable to load checklists**. Click **Try again**. If the problem continues, click **Open support ticket**.

How to search and filter

1. Type in the **Search checklists** field.
2. Choose **Checklist type** to show a single type (the default is **All checklist types**).
3. To narrow the list to a range of codes, fill in **From Code** and **To Code** and press Enter.
4. In **All**, you can choose a **User name**: **All users**, **My checklists**, or **Other users' checklists**.

5. Click **Filter by structures** to choose a sub-project, structure, structure part, and element.
6. To filter by dates, click **Advanced Filters** and fill in **From Date** / **To Date**.

Each active filter appears as a tag above the list. Clicking the X on a tag removes it, and **Clear all** removes them all.

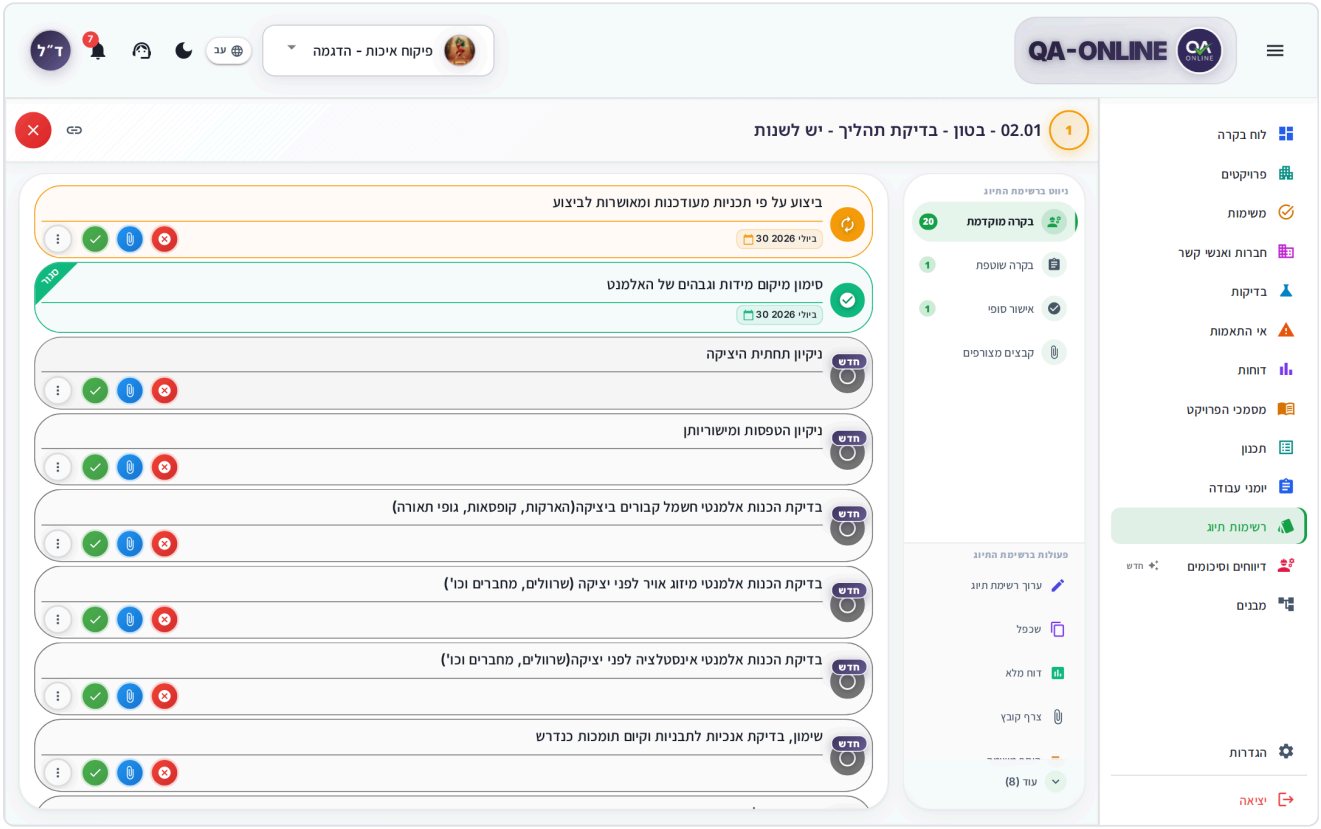
> **Tip:** In table view, you can also sort and filter by column: click the column header.

> **Note:** When you switch between **All** and **Mine**, the code, date, user, and structure filters are reset.

On phones and tablets, the filters are collapsed. Click the filters button to open them.

What's in the detail window

- **At the top of the window** – the checklist code, type, status, and location, and an actions bar.
- **In the window's side menu** – **Details**, followed by the categories (for example, **Preliminary inspection**, **Ongoing inspection**, **Final approval**). The window opens at the first category that isn't completed yet.
- **In the body of the window** – a card for each step, with its status, the person responsible, and the closing date.



The Checklist Details window with step cards

How to fill in a step

1. In the detail window, click the step's card. The step window opens.

2. Fill in the fields: status (for example, OK / Not OK / Not needed), comments, document number, and so on – depending on what's defined for the step.
3. Click **Save Step**.
4. In the **Save Step** window, click **Save**. The message **Saved successfully!** appears.

Saving doesn't lock the step – you can come back and complete it later. When you save, you don't have to fill in all the required fields.

> **Tip:** The confirmation window appears every time you save, sign, or reopen. To skip it, select **Don't show this message again** in the window. To bring the window back, see How to set up confirmation windows in checklists.

> **Note:** The step window doesn't have a separate "Save and close" button. You close a step only by signing it (**Sign Step**).

If the step is linked to other checklists, the checkbox **Sync … connected checklists** appears above the buttons. Select it to apply your change to them too.

Attaching photos and files to a step

1. In the step, or with the **Attach File** button on the step's card, open the **Attach File to Step** window.
2. Choose a file or take a photo. You can add a **Caption (optional)**.
3. To mark up a photo (arrows, circles, text), click **Edit image**.
4. Click **Upload Files**.

The files appear in the step under **Attached Files**. Clicking a file opens a preview, and from there you can **Download** or **Delete file**. For an explanation of file upload and the image editor, see Shared tools.

> **Tip:** Inside the step window, you can move to the previous or next step without going back to the list.

The step window before signing is shown in step 9 of How to create a new checklist.

How to sign a step

1. Fill in all the required fields in the step.
2. Click **Sign Step**.
3. In the **Sign Step** window, click **Sign**.

Your saved digital signature is attached to the step, and the step closes. The message **Step closed successfully** appears. The signature is uploaded by your organization's system administrator, and until it's uploaded, the signature field in the step shows **No signature available** (see Digital signature).

Who sees the Sign Step button:

- The person responsible for the step (by role).

- If the step has the non-conformance status, the person responsible sees the button only when the step is set up so that it can be closed even without approval.
- A user who isn't the person responsible – only when the step is set up so that other users can close it too.

> **Note:** If the **Sign Step** button is gray, hover over it:
>
> - **Please fill all required fields** – required fields are missing.
> - **No permission to close last step** – your role doesn't have permission to close steps. The message appears on every step, not just the last one.

> **Don't see this option?** If you aren't the person responsible for the step, **Sign Step** isn't shown. The button also isn't shown on a step that has a field for choosing a responsible contact. Contact the project manager.

When all the required steps are signed, the checklist moves to the **Closed** status.

Steps that depend on other steps

Some steps can be filled in only after other steps are closed. The card of such a step shows a lock icon with the number of missing steps. Click it (**Click to view required steps**) to see which steps need to be closed first.

Test steps (lab / survey)

A step that requires a lab test or a survey creates an order directly from the step:

- **Lab test step** – click the step, fill in the sample details, and click **Create Inspection**. In the **Send Exam Order** window, click **Send Order**. The order is created, the step is signed, and the message **Exam order sent successfully** appears. To correct a closed test step, click **Open test step**.
- **Survey step** – click the step, fill in **Survey Location**, **Contractors Company**, **Surveyor**, and **Survey Type**, and click **Create Survey**. In the **Confirm Survey Order Creation** window, click **Create Order**. You can create only one order for each survey step; if you try again, **Survey Already Created** appears.

> **Note:** **Create Inspection** is gray when the step's status is **Not OK**, or when required fields are missing. Hover over the button to see what's missing.

To link an order that already exists to a step, choose **Bind exam order** in the card's menu, or **Associate Orders** in the checklist's menu. For details about orders, see Tests.

Quick actions on a step

On a step's card, you can perform actions without opening the step.

Round buttons appear only when all of these conditions are met: the step type allows quick actions, you're in a role that approves the step, the step isn't in the **Tests** or **Final approval** category, its status is **New**, **In progress**, or **NC**, and it has no required steps that haven't been closed yet.

Button	What it does
Approve & Close	Closes the step immediately, without a confirmation window
Attach File	Attaches a photo or a file to the step
Close as Non-Conformance	Moves the step to the non-conformance status (the checklist will be shown under **NC**)

The **three-dot menu** on the card appears on every step:

Item	When it appears
Edit Step	Always
Approve Close Step, **Attach File**, **Close as Non-Conformance**	When the quick actions are shown in the menu and not as buttons
Close non-required step	On steps that don't have quick actions, except for **Final approval** in the last category. Confirm in the **Confirm Close Non-Required Step Order** window
Bind exam order	On test steps

> **Tip:** You can choose whether the quick actions appear as separate buttons or in the three-dot menu – see How to set up confirmation windows in checklists.

How to reopen a closed step

1. Open the closed step.
2. Click **Reopen Step**.
3. In the **Reopen Step** window, confirm by clicking **Reopen**.

The step becomes open for editing again, and you can correct it and sign it again.

Checklist actions

In the actions bar of the detail window, or in the three-dot menu on a card or on a row in the table:

- **Watch** / **Checklist Details** – opens the checklist.
- **Edit Checklist** – edits the checklist's details. See How to edit an existing checklist.
- **Duplicate** – a new checklist of the same type with the same details. See How to duplicate a checklist.
- **Full Report** – a PDF of the checklist with all the steps, signatures, and photos.

- **Empty Report** – a blank form to print and fill in by hand on site.
- **Attach file** – attaches a document to the whole checklist (not to a specific step).
- **Add task** – a task that's linked to the checklist. See Tasks.
- **Add to calendar** – adds the checklist to your personal calendar.
- **Associate Orders** – links lab or survey orders to test steps in the checklist.
- **Change step dates** – sets a new date for the checklist's steps (see below).
- **Pin** / **Unpin** – pins to the top of the list.
- **Groups** – adds the checklist to a group (see below).
- **Reopen Checklist** – appears on a closed or canceled checklist, and returns it to the open status.
- **Cancel Checklist** – cancels the checklist. Confirm in the **Cancel Checklist** window by clicking **Cancel Checklist**.

> **Note:** **Cancel Checklist** may affect the workflow. You can bring back a canceled checklist only through **Reopen Checklist**.

> **Don't see this option?** Editing, duplicating, attaching a file, associating orders, changing dates, canceling, and group actions are available only to people with edit permission. Contact the project manager.

Checklist statuses

Status	Meaning
New	The checklist was opened, and no step has been filled in yet
In progress	Some of the steps were filled in or signed
Pending	Waiting for an outside party, for example, lab results
NC	One of the steps was closed as a non-conformance
Closed	All the required steps were signed
Canceled	The checklist was canceled

Reports: Full Report and Empty Report

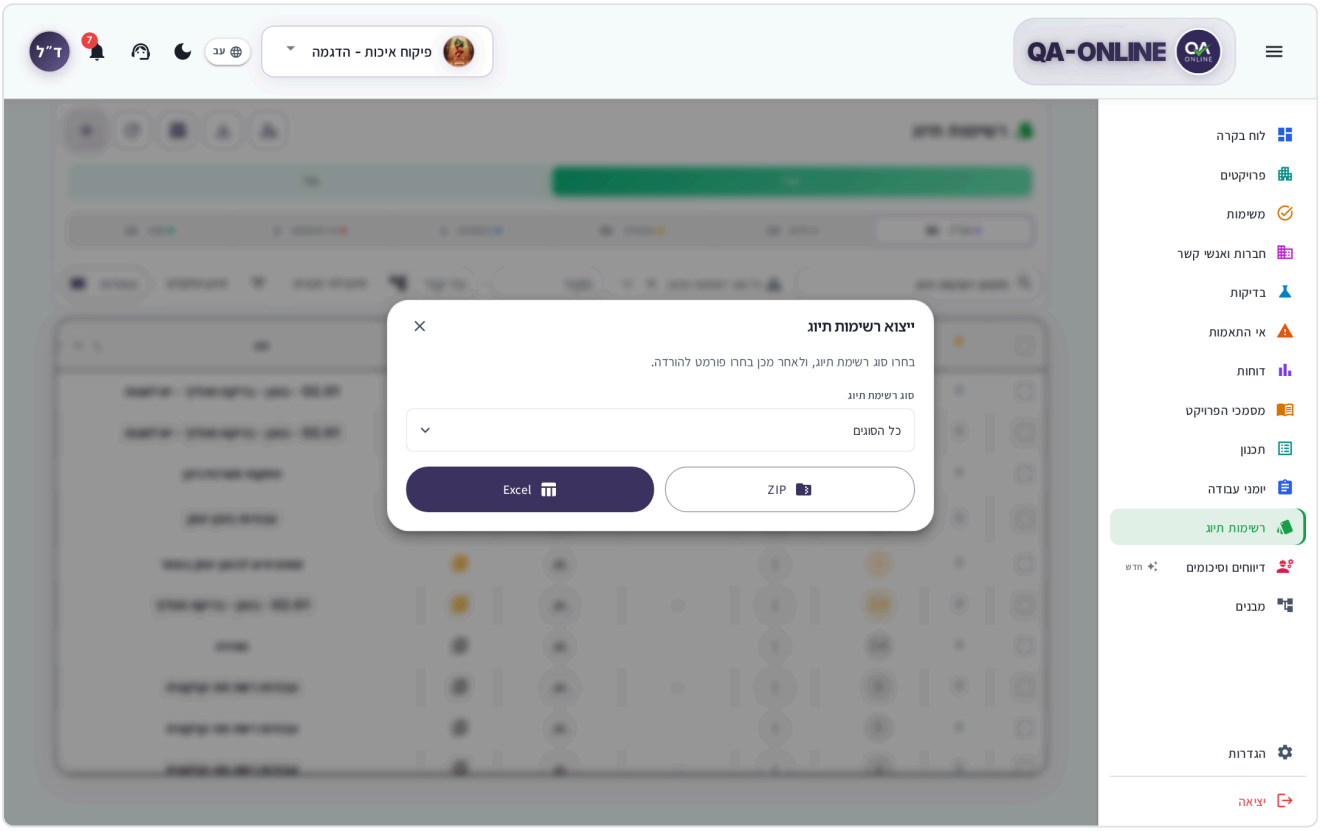
1. On a card, on a row, or in the detail window, click **Full Report** or **Empty Report**.
2. The PDF opens in a preview. From there, you can download it, print it, or copy a link.

In table view, there's a **PDF** column – clicking it opens the full report directly. For an explanation of the preview, see Shared tools.

How to export to Excel or ZIP

1. Filter the list as needed, or select rows in table view.
2. Click the export button (a download arrow) at the top of the screen. The **Export Checklists** window opens.
3. Choose a **Checklist Type**, or **All types**.
4. Choose a format:
   - **ZIP** – a compressed file with the PDF reports of the checklists.
   - **Excel** – a table of the checklists.
5. The file is prepared in the background. Progress is shown in the corner of the screen, and when it's done, a preview opens with an option to download.

If you selected rows, the export includes only those.



The Export Checklists window

> **Note:** If the button is gray and **Export is unavailable for this project** appears, the option wasn't enabled in the project.

How to act on several checklists at once

From a selection in the table

1. Switch to the **Table** view (on a computer or a wide tablet).

2. Select the checkbox on the rows you want. In the bar that opens, you'll see **… selected**.
3. Choose an action: **Pin** / **Unpin**, **Add task**, **Attach file**, **Change step dates**, or **Cancel** (canceling the selected checklists).
4. To clear the selection, click **Clear selection**.

> **Don't see this option?** **Attach file**, **Change step dates**, and **Cancel** appear only when all the checklists you selected are yours and can be edited. View-only users don't have checkboxes.

Advanced action wizards

For working on many checklists of the same type, there are three wizards. You open them from the floating **+** button (hover over it or click it), or on a tablet from the **Advanced Actions** panel below the filters. The floating button isn't shown when the list is empty or when you have view-only permission.

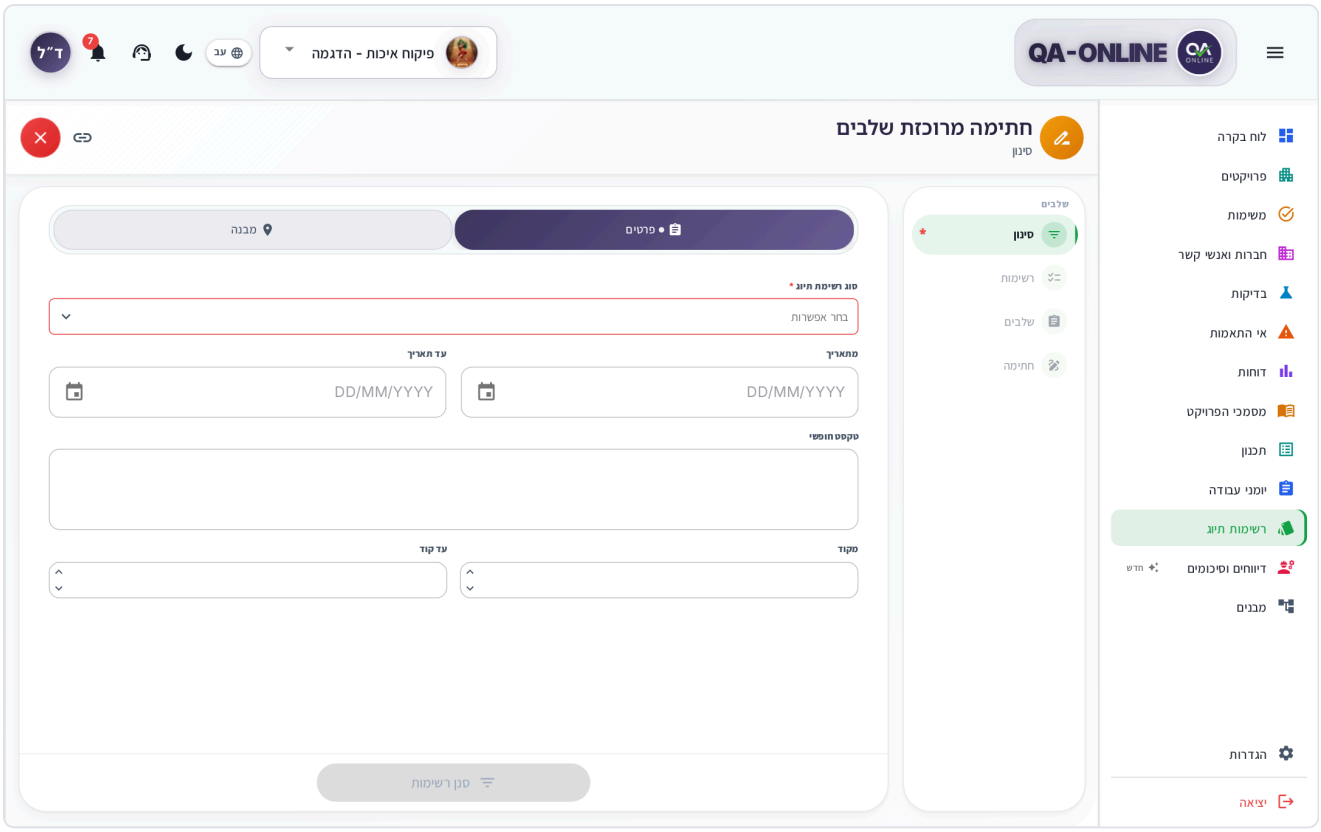
- **Bulk Steps Signing** – signing the same step in several checklists at once. The wizard steps are: **Filters** → **Checklists** → **Steps** → **Sign**.
- **Close Bulk Checklists** – closing several checklists together with a closing date. The wizard steps are: **Filters** → **Checklists** → **Close**.
- **Associate Tasks** – assigning responsibility for checklists to a contact, so they appear in that person's Tasks. The wizard steps are: **Filters** → **Checklists** → **Assign**.

How to work with a wizard:

1. In **Filters**, choose a **Checklist type** (and in Associate Tasks, a **Role** too), and narrow the list by **From Date** / **To Date**, **Free Text**, **From Code** / **To Code**, or location.
2. In **Checklists**, select the checklists (or **Select all**; to undo, **Deselect all**).
3. Continue by clicking **Next** and fill in the last step:
    - **Bulk Steps Signing** – choose the steps and fill in status, comments, document number, and **Closing Date**.
    - **Close Bulk Checklists** – choose a **Closing Date**. Your signature appears under **User Signature**.
    - **Associate Tasks** – **Select responsible**, or **Self**.
4. Confirm in the confirmation window:
    - **Confirm bulk signing** – click **Confirm**.
    - **Confirm Checklist Closing** – click **Confirm**. The message **Checklists closed successfully** appears.
    - **Responsibility Assignment Approval** – click **Approve Changes**. The person responsible gets a notification; if it couldn't be sent, **Responsibility assigned (notification was not sent)** appears.

> **Note:** In bulk signing, you can't close a step whose status is **Not OK**. Choose the status **OK**, or remove the step from your selection.

> **Tip:** You can copy a link to an open wizard and send it to a colleague.



The bulk signing wizard at the checklist selection step

Change step dates

1. In the checklist's menu (or in the selection bar in the table, for several checklists at once), choose **Change step dates**.
2. In the **Change step dates** window, choose a new **Date**.
3. Click **Confirm**. The message **Checklist date changed successfully to …** appears.

The new date applies to all the steps in the checklist (or checklists) you selected.

Checklist groups

You can bundle several checklists of the same type into a group, for example, all the pour checklists for the same floor. In the checklist's menu, under **Groups**:

- **Add to New Group** – creates a new group with the checklist.
- **Add to Existing Group** (or **Change Group**) – adds the checklist to another group.
- **Exclude from Group** – takes the checklist out of the group. Confirm in the **Remove from Group** window.
- **Explode Group** – dissolves the whole group: all the checklists stay in the system, but they no longer belong to a group. The message **Group with all checklists removed successfully** appears.

> **Note:** **Explode Group** doesn't delete checklists, but you can't undo it. To bundle the checklists again, create a new group.

Exclude from Group and **Explode Group** appear only on a checklist that already belongs to a group.

In table view, the **Group number** column shows which group each checklist belongs to.

Pinned checklists

You can pin checklists that you work on often:

1. In the checklist's menu, click **Pin**.
2. The checklist appears at the top of the screen in the **Pinned Checklists** area (in the cards view), or at the top of the table.
3. To remove it, click **Unpin**.

Pinning is personal and is saved for next time. For details, see Shared tools.

How to share a link

1. Open the checklist (or a specific step in it).
2. In the window header, click **Copy link** (on a phone: **Share**).
3. Paste the link into a message, an email, or WhatsApp.

Anyone who opens the link goes straight to the checklist or the step, as long as they have permission for the project. For details, see Shared tools.

Checklists management (for administrators)

Authorized administrators see the **Checklists management** icon at the top of the screen. On this screen, you perform one action on many checklists:

1. Choose an **Operation** and a **Checklist type**.
2. Set **Advanced filters** and click **Search**.
3. Select the relevant checklists.
4. Fill in the details of the action, if they're required (for example, **Closing date**, **Contact name**, or **Open stage**).
5. Click the apply button and confirm in the **Confirm operation** window.

The checklist types themselves (the templates – categories, steps, and people responsible) are defined in Settings by the system administrator. See also For your organization's system administrators.

> **Don't see this option?** Checklists management and defining types are available only to administrators. Contact your organization's system administrator.

What you see by role

Not every user sees every module and action. Permissions are set by your role in the project. If a module or button is missing, contact the project manager or your organization's system administrator.

In checklists, this shows up in the following ways:

- **Scope** – some users see only **Mine** or only **All**.
- **View only** – you can open checklists and produce reports, without creating, editing, or signing.
- **Signing steps** – only the person responsible for the step (by role), unless the step is set up so that other users can close it too.
- **Management** – **Checklists management** is available to administrators only.

On your phone

- Available views: **Cards** and **Calendar** (there's no table, so no multi-row selection).
- The filters are collapsed below the header. Tap to open them.
- Creating, editing, and duplicating on a phone are shown with screenshots in the **On your phone** sections of creating, editing, and duplicating.
- The detail window and the step window open full screen. In the step window, the **Save Step** and **Sign Step** buttons appear side by side at the bottom.
- To take a photo directly into a step, choose the camera when you attach a file.

Frequently asked questions

Why does only a PDF open when I open a checklist in "All"? The checklist belongs to another user, so a read-only **Full Report** is shown. Your own checklists open for work from **Mine**.

Why is the "Sign Step" button gray? Required fields are missing, or your role doesn't have permission to close steps. Hover over the button to see the reason.

I exploded a group. Were the checklists deleted? No. **Explode Group** removes only the group. The checklists stay in the list, without a group number.

What's the difference between "Save Step" and "Sign Step"? Save Step saves a draft, and you can keep editing. **Sign Step** attaches your signature and closes the step.

I signed by mistake. Can I fix it? Yes. Open the step and click **Reopen Step**, correct it, and sign again.

How do I bring back a checklist that was canceled? In the checklist's menu, choose **Reopen Checklist**. The status returns to open.

See also

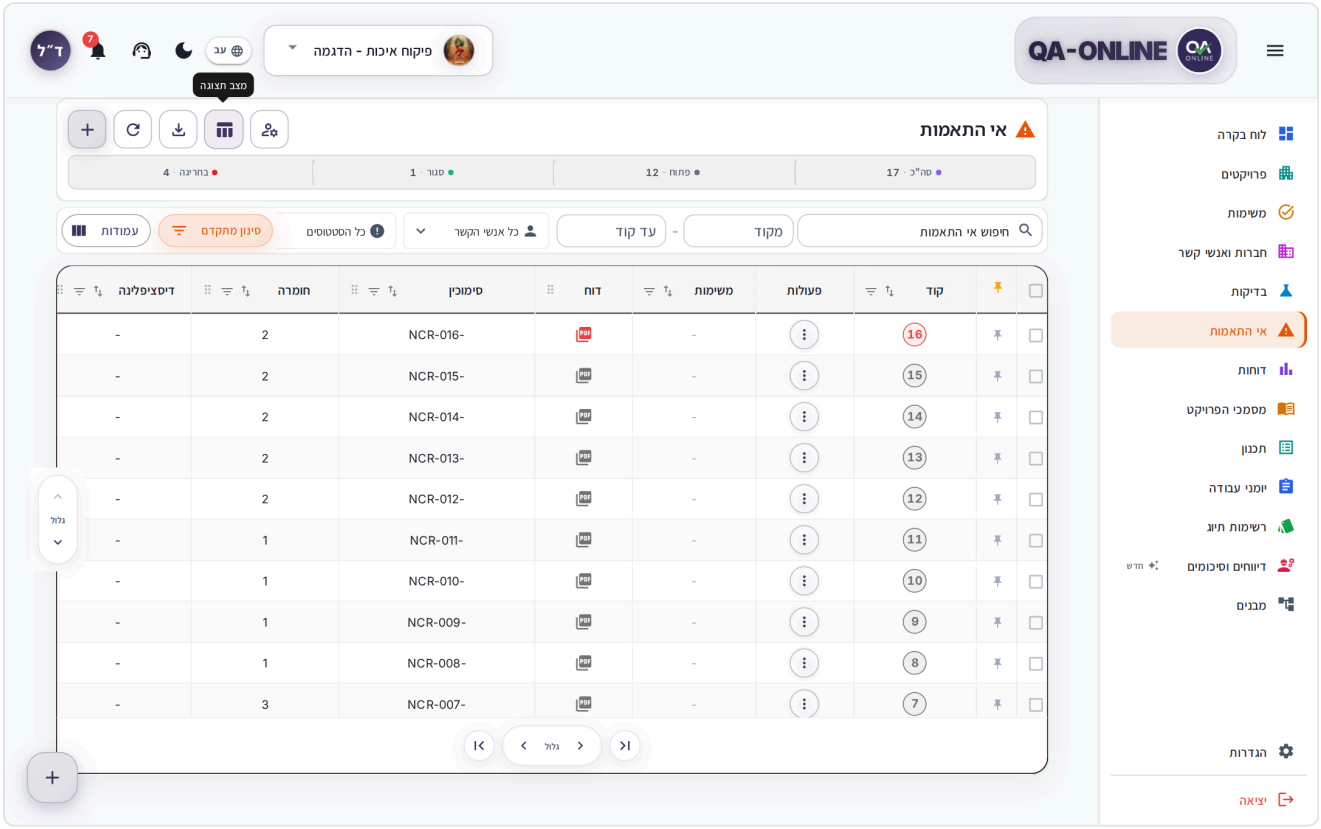
- Tests – the lab and survey orders that test steps create.
- Tasks – steps and checklists that are waiting for you.

- Shared tools – the location picker, attaching files, reports, and copying links.
- Settings – confirmation windows and the quick actions display.
- For your organization's system administrators – defining checklist types and uploading signatures.

Non-conformances

Document, handle, and track defects and deviations from the specification on site, from the moment they're opened until they're closed.

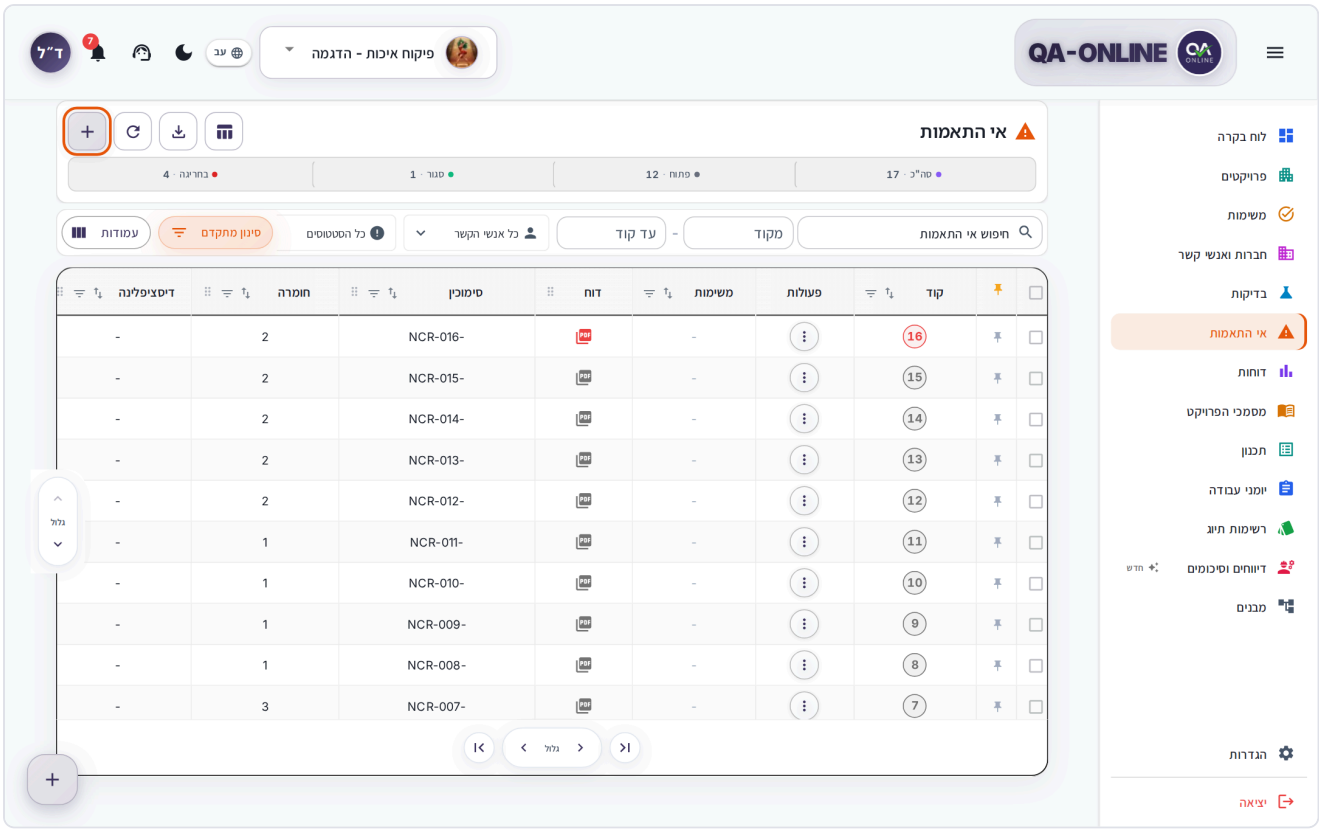
A non-conformance is a defect in work, material, or process that doesn't meet the requirements (plan, specification, standard). Inspectors and quality control staff open a non-conformance, set a responsible party and an expected close date, and the party handling it documents the work. Once the defect is fixed, you close the non-conformance and notify the relevant people.



Non-conformances screen in table view

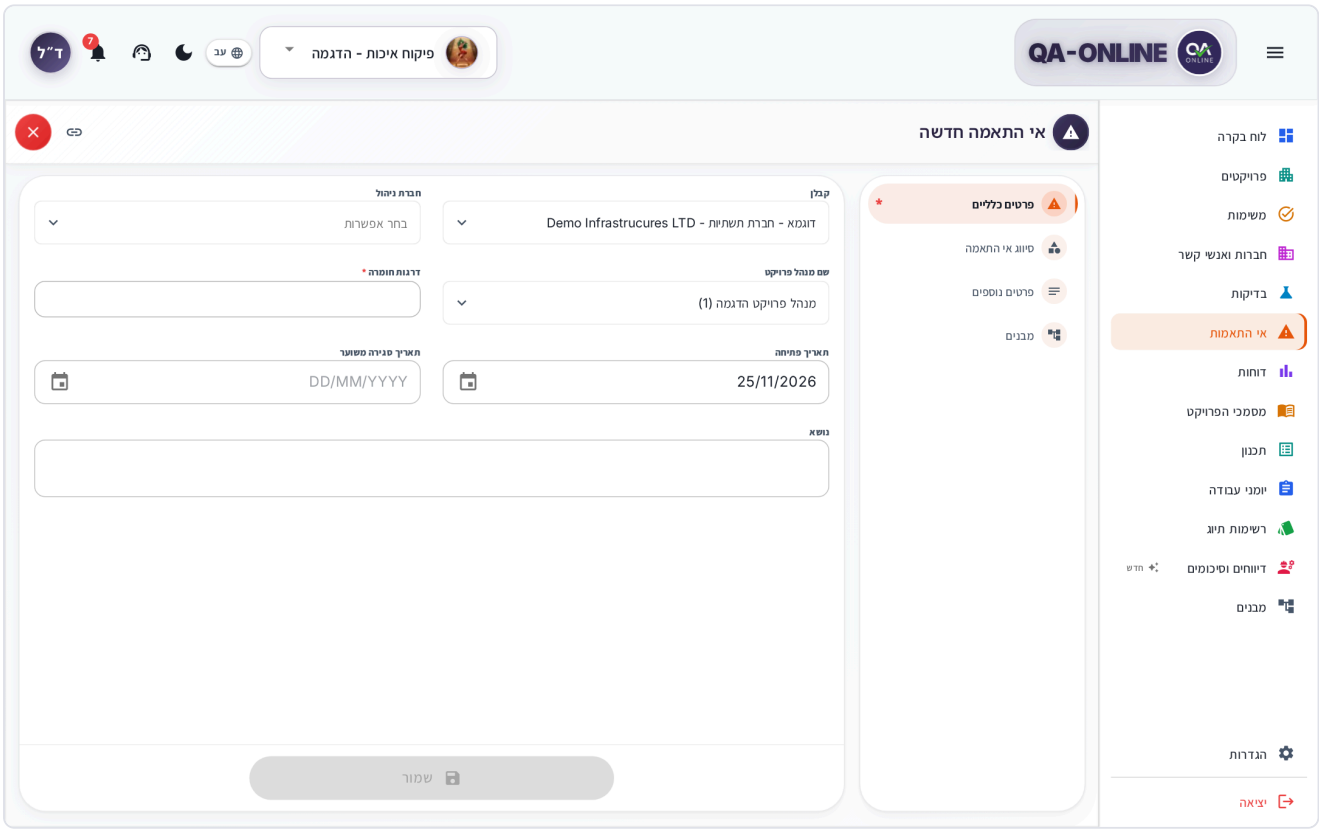
Create a new non-conformance

1. Select the project in the Project selector, then click **Non Conformances** in the side menu.
2. At the top of the screen, click **+** (**Create new non-conformance**).



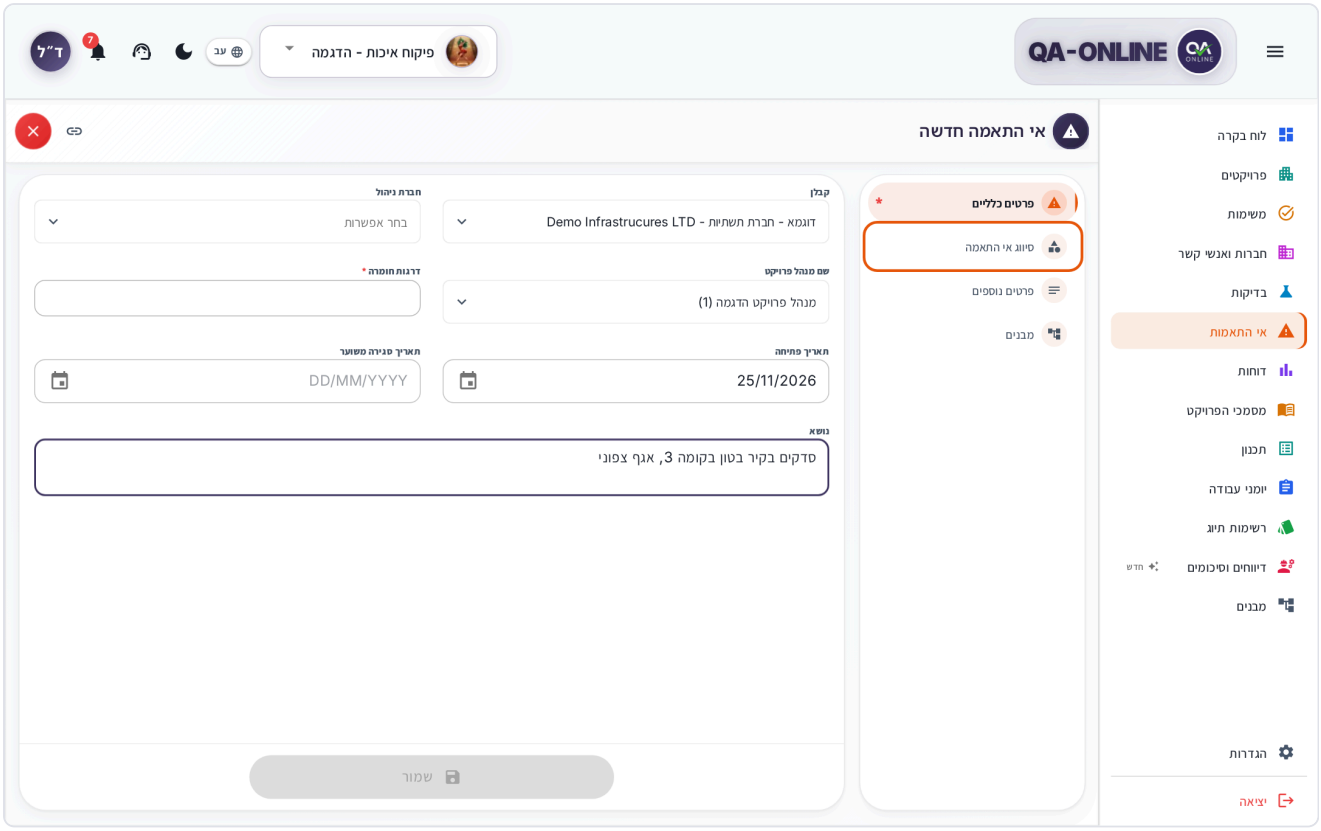
Non-conformances screen with the + button at the top highlighted

3. The **New non-conformance** window opens on the **General details** section. **Opening date** is already filled in with today's date. Select a **Contractor**, then fill in the remaining fields in this section.



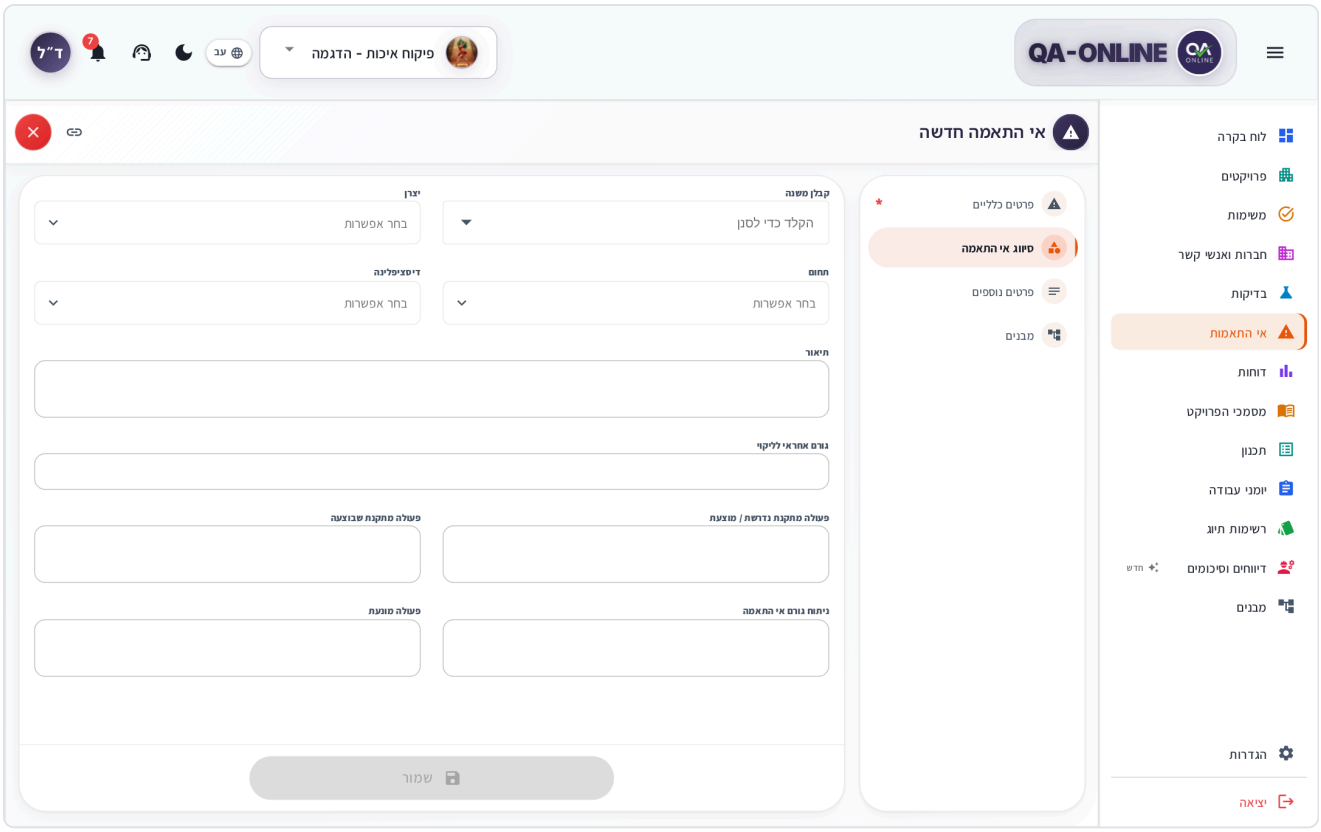
New non-conformance window on the General details section

4. In the **Subject** field, describe the defect and where it is in one sentence. Then click **Non-conformance classification** in the window menu.



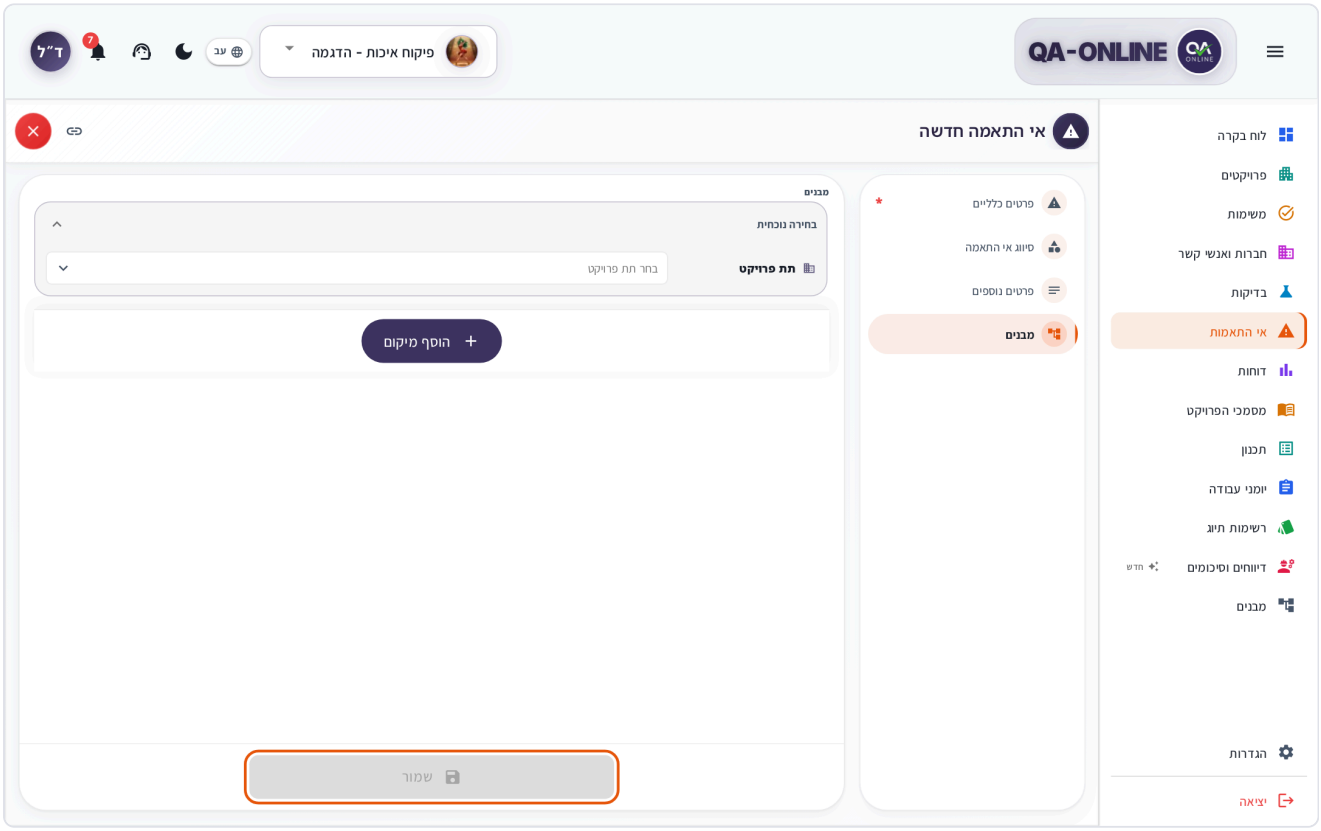
Subject field filled in, with the Non-conformance classification section highlighted in the window menu

5. In **Non-conformance classification**, fill in the description, the responsible party, the discipline, and the required corrective action. If needed, go to **More details** as well.



Non-conformance classification section with the description and responsible party fields

6. Click **Structures** and select the location on site. If the defect is in several places, click **Add location**.
7. Click **Save**.



Structures section with the Add location button, and the Save button highlighted

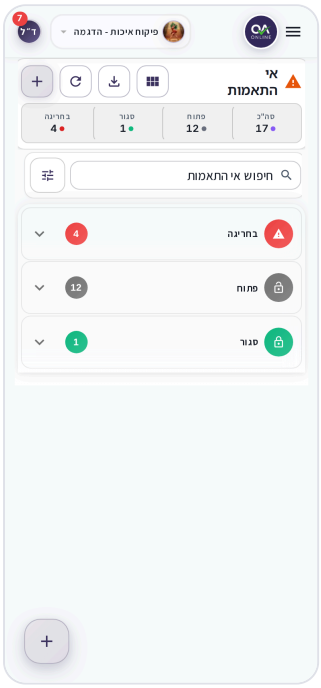
8. In the **Non-conformance created successfully!** message, click **Go to non-conformance** to attach photos and continue handling it, or click **Close**.

Every new non-conformance starts with the status **Open**. Next to each section in the window menu, you can see how many required fields you've already filled in.

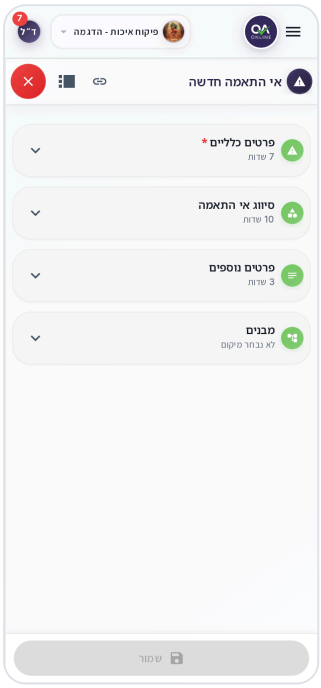
> **Note:** The list of fields, their names, and which ones are required are set in the project settings and depend on your role. A teammate with a different role may see different fields.

On your phone

1. In the list, tap **+** at the top of the screen, or the floating button in the corner.
2. The sections are stacked one below the other. Tap a section to open it, and fill them in order: **General details**, **Non-conformance classification**, **More details**, **Structures**.
3. Tap **Save** at the bottom of the screen.



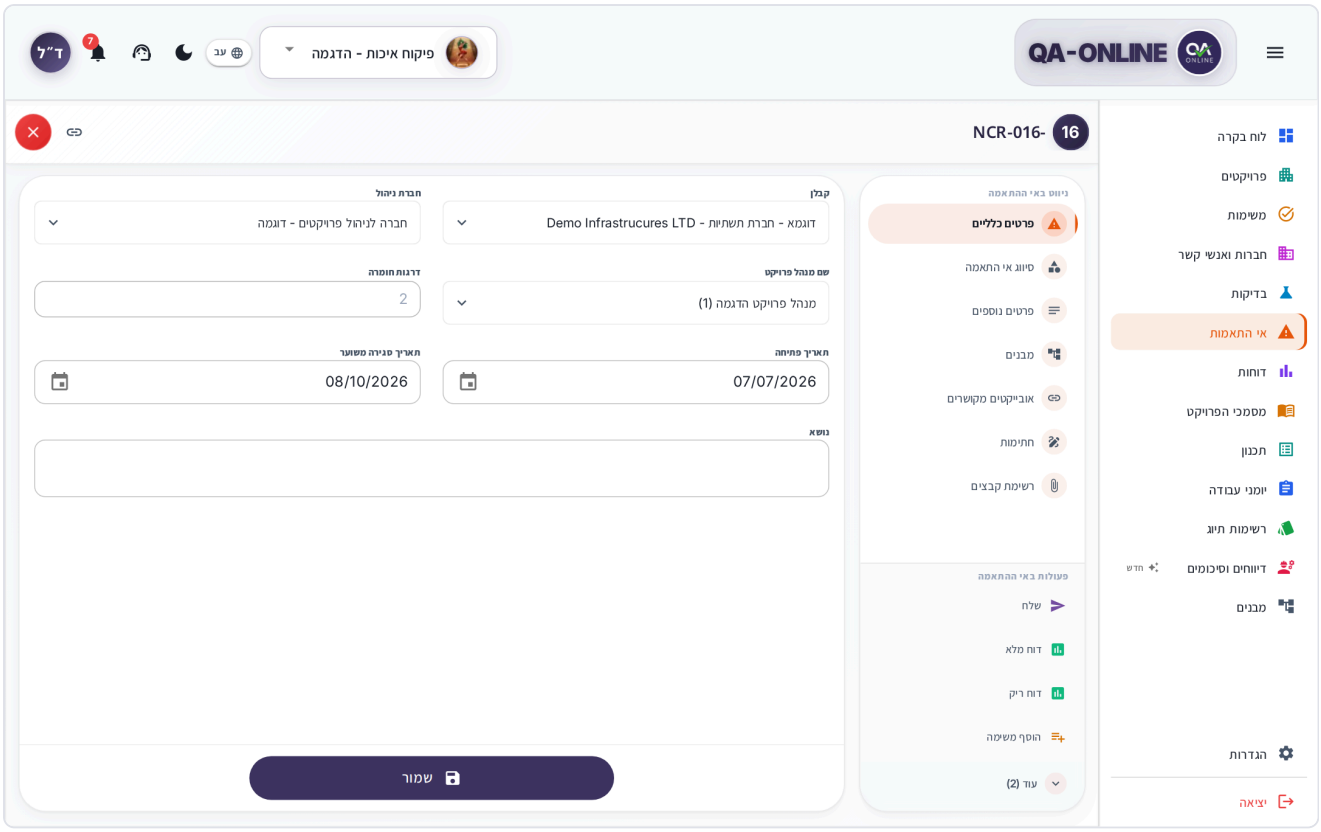
Non-conformances on a phone, grouped by status



New non-conformance window on a phone, with the sections collapsed

Edit an existing non-conformance

1. Find the non-conformance by searching, by using a counter (for example **Open**), or in the list.
2. Click the row or the card (or use the three-dot menu: **Edit Non-Conformance**). The Detail window opens, with the code in the title.



Detail window of an existing non-conformance, with the sections and actions menu

3. In the **Navigate in non-conformance** menu, select the section you want to change, for example **Non-conformance classification** or **Structures**, and edit the fields.
4. Click **Save** at the bottom of the window. The message **Details saved successfully** appears.

The side menu has two groups:

- **Navigate in non-conformance** – **General details**, **Non-conformance classification**, **More details**, **Structures**, **Linked objects**, **Handling steps**, **Signatures**, and **File list**.
- **Operations in non-conformance** – **Send**, **Full Report**, **Empty Report**, **Add task**, **Add to calendar**, **Pin Non-Conformance**, and more.

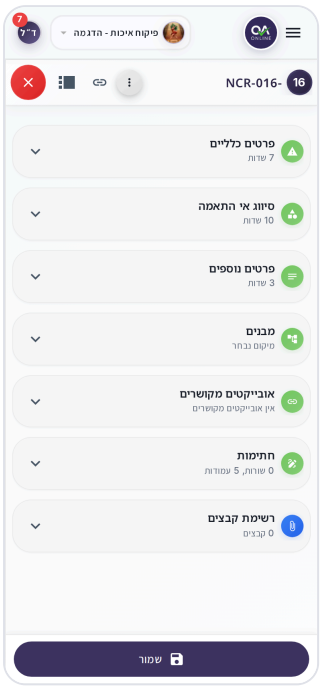
> **Tip:** **Linked objects** shows items related to the non-conformance, such as a checklist or a test. From there, you can open the report for each linked item.

> **Don't see this option?** If the menu shows **View Non-Conformance**, you have view-only permission and there's no **Save** button.

Non-conformances don't have a duplicate action. To document a similar defect, create a new non-conformance.

On your phone

Tap a status group (for example **Open**), then tap the card. The non-conformance opens in full screen, with the sections stacked one below the other. Tap a section, make your changes, and tap **Save** at the bottom.



An open non-conformance on a phone, with the sections and the number of fields in each

What you see on the screen

At the top of the screen is the title **Non Conformances**, with these buttons beside it: view mode, the export icon (**Export Non Conformances**), **Refresh**, and the **+** button (**New non-conformance**).

Below the title is a row of counters. Clicking a counter filters the list, and clicking the same counter again clears the filter:

Counter	What it shows
Total	All non-conformances in the project
Open	Non-conformances that are still being handled
Closed	Non-conformances that have been closed
Overdue	Open non-conformances whose expected close date has passed

> **Note:** Clicking a counter clears the search and all other filters.

View modes

- **Table** – Dense rows, handy for scanning and for working on several items at once. Available on desktop only.
- **Cards** – One card per non-conformance, with the code, subject, opening date, status, and number of overdue days.
- **Calendar** – Non-conformances are arranged on a monthly calendar by date.

On a phone, the **Cards** and **Calendar** views are available. Choosing and arranging table columns is explained in Common tools.

Non-conformances you've pinned appear at the top of the list under **Pinned non-conformances**.

Search and filter

1. Type in the **Search non conformances** field. Search looks through all the table columns, plus the subject and the description.
2. For a range of codes, fill in **From NC code** and **To NC code**.
3. To see only non-conformances opened by a specific person, select them in the **Contact** field (default: **All contacts**).
4. To show a single status, choose **Status**.
5. To change the order, choose **Sort by**: **By NC code** or **By opening date**.

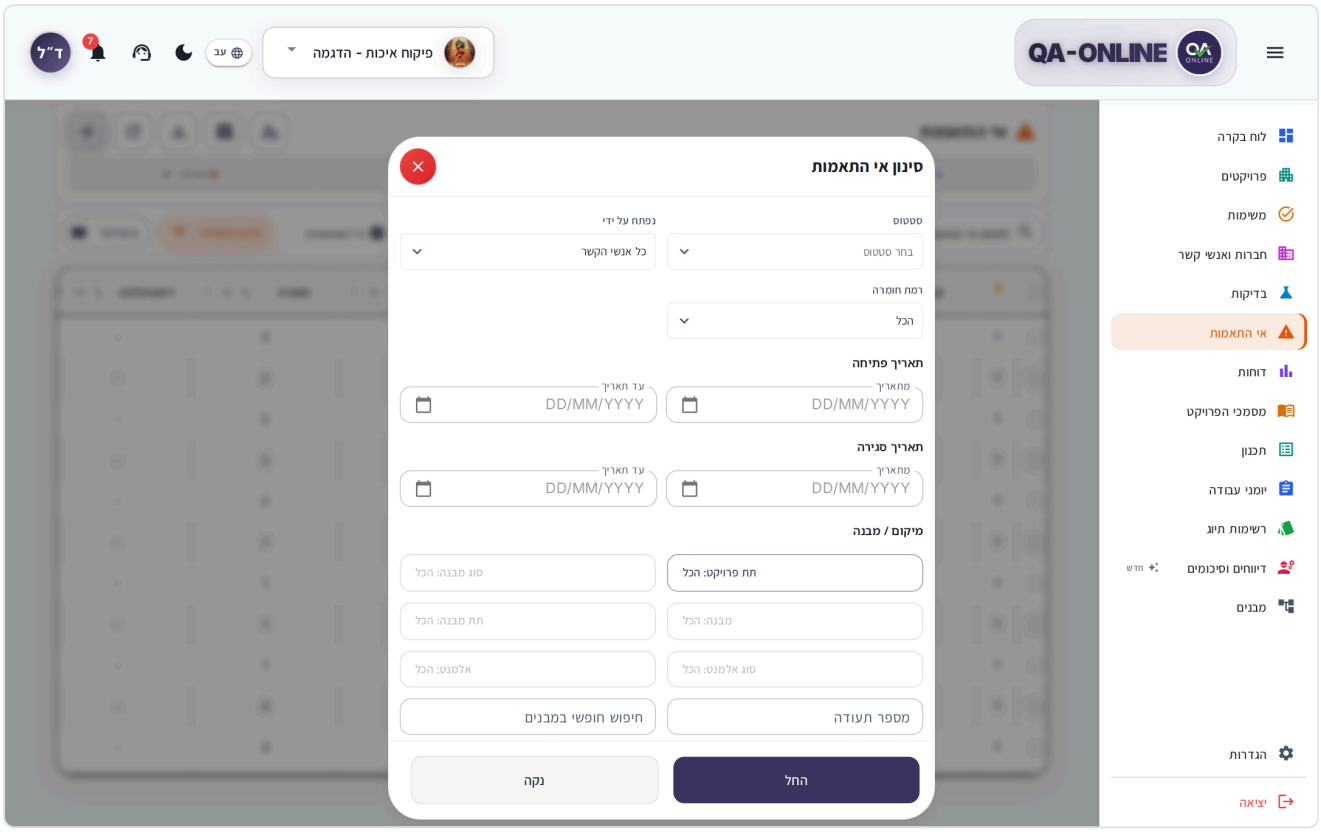
The **Status** list shows the statuses that actually exist in the project, plus two more options:

- **Overdue - Open** – Open, and past their due date.
- **Overdue - Closed** – Closed after their due date.

Advanced filters

1. Click **Advanced Filters**. The **Non-conformance filters** window opens.
2. Choose a **Status** and a **Severity level**.
3. Fill in **Opening date** or **Closing date** (**From date** / **To date**).
4. Under **Location / Structure**, choose a **Sub-project**, **Structure type**, **Structure**, **Sub Structure**, **Element type**, and **Element**, or search using **Free search in structures**.
5. If needed, fill in **Certificate number** or choose **Opened by**.
6. Click **Apply**. To reset your selections in the window, click **Clear**.

Each active filter appears as a tag above the list. Clicking the X on a tag removes that filter, and **Clear all** removes all of them.



Non-conformance filters window

Location, responsible party, and files

Choose a location

1. In the **Structures** section, choose a sub-project, structure, floor, and element.
2. To mark several elements on the same path, select all of them.
3. If the defect is in several places, click **Add location** and add another path.

The location picker is explained in full in Common tools.

Responsible party and expected closing date

- The **Responsible party** (in the **Non-conformance classification** section) is the company or person who should fix the defect.
- The **Expected closing date** (in the **General details** section) is the deadline for the fix. Once it passes, the non-conformance is counted as **Overdue** and shown in red.
- If you opened a non-conformance and set an expected closing date, the deadline appears in your Tasks and on the Dashboard as a reminder (**Expected closing date**) for as long as it's open.

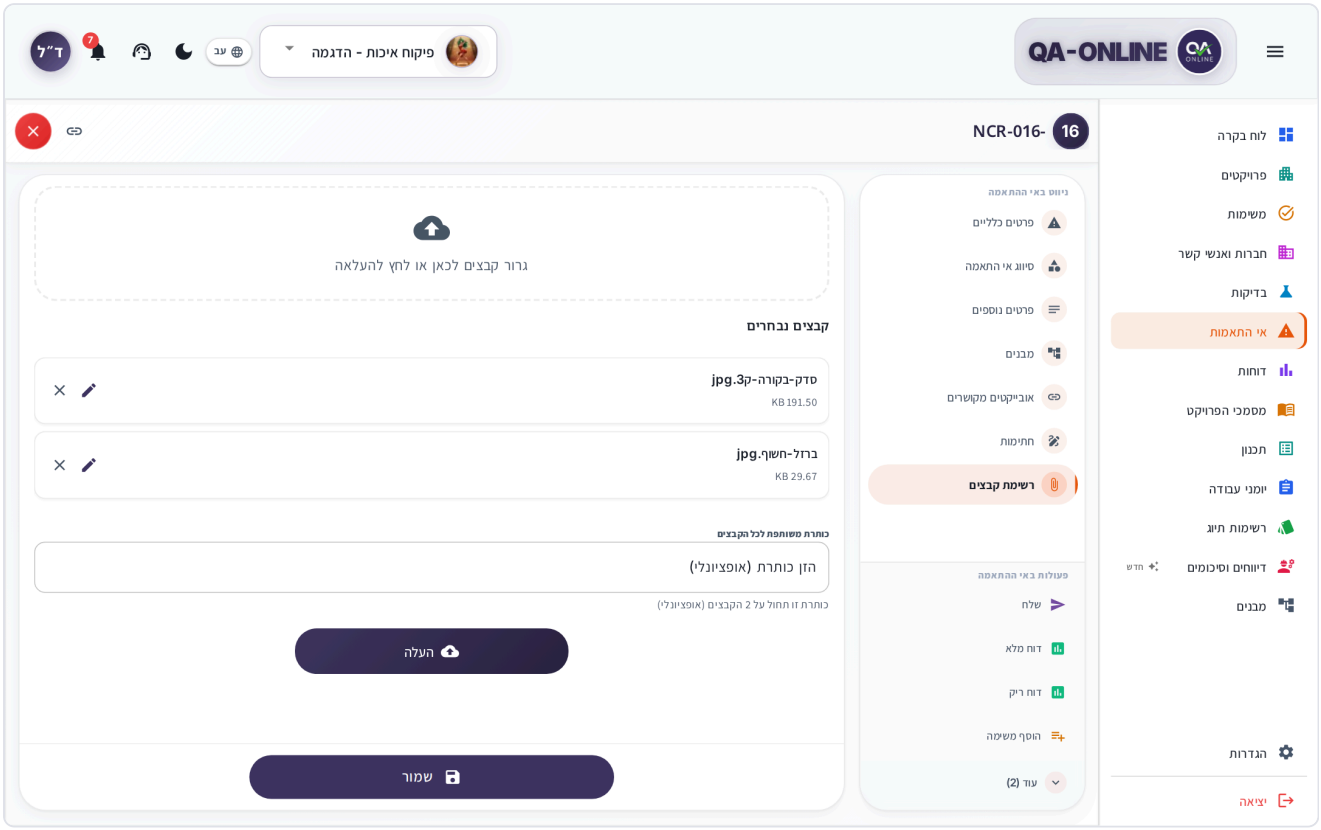
Attach photos and files

You attach photos and files after the first save:

1. Open the non-conformance (or click **Go to non-conformance** after creating it).

2. In the window menu, choose **File list**.
3. Click **Add files** and choose photos or documents. If you'd like, enter a title.
4. Click **Upload**.

For each file, you can choose **Edit image**, **Edit title**, **Download**, or **Delete**. Attaching files and the image editor are explained in Common tools.



File list in a non-conformance with photos

Non-conformance workflow

Statuses

Status	How it's set
Open	Every new non-conformance starts with this status. Reopening a closed non-conformance also returns it to this status.
Follow-up	Chosen manually in the **Status** field in the **General details** section, when handling continues and needs to be tracked.
Closed	Only through the **Close non-conformance** button (see below).

In an existing non-conformance, the **Status** field in the **General details** section is a dropdown list. The options in the list are set in your organization's settings, so you may see additional statuses (for example **Follow-up** or **Ready to close**). Click **Save** to save a status change.

Overdue isn't a status. It's a marker that appears next to the status (for example "Overdue · Open") when the expected closing date has passed.

Step 1: Log handling steps

In the **Handling steps** section, you document every action taken to fix the defect.

1. Open **Handling steps** and click **Add row**.
2. Fill in **Date**, **Action type**, **Transferred to**, and **Details**.
3. Click **Save** at the bottom of the window.
4. When the step is complete, click the lock icon in the row (**Close step**). The **Close step** window opens.
5. Choose a **Closing date** (required, and it can't be a future date) and click **Close step**.

The status of each step is shown as **Open** or **Closed**. A closed step can't be closed again.

Step 2: Signatures

In the **Signatures** section, you approve the non-conformance with a digital signature.

1. Open **Signatures** and click **Add row**.
2. The row is filled in with your name, your role in the project, and your saved signature. Choose a date.
3. Click **Save**.

To set up a saved signature, see Settings.

> **Don't see this option?** **Add row** in the **Signatures** section only appears for users who are allowed to sign this non-conformance. Other users can only delete their own signature. Contact the project manager.

Step 3: Close the non-conformance

1. Open the non-conformance.
2. Fill in all the fields required for closing. Next to each section in the menu, you can see how many are missing, and those fields are marked **(Required to close non-conformance)**.
3. Click **Close non-conformance** at the bottom of the window. The button is only active once all the fields required for closing are filled in.
4. In the **Close non-conformance** window, fill in the closing details defined in the project, for example **Actual closing date** (default: today, and it can't be a future date), **Closure approved by**, and the checkbox for approval by an authorized body.
5. Click **OK**. The message **Non-conformance closed successfully** appears.

After closing, the form is locked for editing, and **Reopen closed non-conformance** appears at the bottom of the window.

> **Note:** In the regular form, the closing fields are shown as "Set only after the non-conformance is closed". You fill them in only in the closing window.

> **Don't see this option?** The **Close non-conformance** button only appears for users who are allowed to close. In some projects, only the person who opened the non-conformance can close it. Contact the project manager.

Step 4: Send a notification

You can send a non-conformance, open or closed, to the relevant people:

1. In the Detail window, choose **Send** in the operations menu (or in the options menu in the list). The send window opens.
2. Choose a **Distribution list**, **Contacts**, or both. You can also type an email address.
3. Check the **Message** and update it if needed.
4. Click **Send**. The message **Message sent successfully** appears.

Recipients you choose from **Contacts** also get a task in Tasks and a notification. Recipients added only through a distribution list or an email address get an email only.

> **Tip:** The title of the send window is always **Close non-conformance**, even when you're sending an open non-conformance. Sending doesn't close it.

Reopen a closed non-conformance

1. Open the closed non-conformance.
2. Click **Reopen closed non-conformance** at the bottom of the window (or in the options menu: **Reopen Closed Non-Conformance**).
3. In the confirmation window, click **OK**.

The non-conformance returns to the status **Open**, and you can edit it again.

What you see by role

Not every user sees every module and action. Permissions are set by your role in the project. If a module or button is missing, contact the project manager or your organization's system admin.

In Non Conformances, this shows up as follows:

- **View only** – You can open and read non-conformances and generate reports. There's no **+** button, and no saving, closing, sending, or reopening.
- **Opening non-conformances** – Even with edit permission, the **+** button only appears for roles that are allowed to open non-conformances in the project.
- **Different fields** – Which fields are shown, and which are required, depends on the role and the project settings.
- **Severity** – Only some users can change the severity level.
- **Opened by role** – For some roles, the list of options is limited (for example QA only, or QC only).

- **Signature only** – Some users can only sign. For them, the form is locked except for the **Signatures** section, and **Save** (to save the signature) and **Send** appear at the bottom.
- **Closing and reopening** – Limited to authorized users.

More actions from the options menu

In the three-dot menu on a card, on a table row, or in the Detail window:

- **Send** – Send a message (see above).
- **Full Report** – A PDF of the non-conformance with all its details.
- **Empty Report** – A blank form to print and fill in by hand.
- **Add task** – A task linked to the non-conformance. See Tasks.
- **Add to calendar** – Add the non-conformance to your calendar.
- **Pin Non-Conformance** / **Unpin Non-Conformance** – Pin it to the top of the list. See Common tools.
- **Reopen Closed Non-Conformance** – Only on a closed non-conformance.

Act on several non-conformances at once

1. Switch to the **Table** view.
2. Select the checkbox on the rows you want, or the checkbox in the header to select all.
3. In the bar that opens, choose an action: **Pin** (or **Unpin Non-Conformance**), **Add task**, **Send**, or **Reopen** (only when all the selected rows are closed).
4. To clear your selection, click **Clear selection**.

Export

1. Filter the list as needed, or select rows in the table view.
2. Click the export icon (**Export Non Conformances**) at the top of the screen. The **Export Non Conformances** window opens.
3. Choose a format:
    - **ZIP** – A compressed file with the non-conformance documents.
    - **Excel** – A table of the non-conformances.
    - **NATI** – An Excel file in the Israel National Roads format.
4. The file is prepared in the background. Progress appears in the **Downloads** window, and when it's done, a preview opens with an option to download.

The export includes only what's shown based on the active filters, or only the rows you selected. After a ZIP export, the button waits a few minutes before you can export again, and shows **Wait ~X min**. For details on exporting and previewing, see Common tools.

Share a link

1. Open the non-conformance.
2. In the window title, click **Copy link** (on a phone: **Share**).
3. Paste the link into a message, an email, or WhatsApp.

Anyone who opens the link goes straight to the non-conformance, as long as they have access to the project. For details, see Common tools.

Frequently asked questions

Why is the "Close non-conformance" button gray? Some fields required for closing haven't been filled in yet. In the side menu, check which sections are marked as having missing fields.

Why can't I attach a photo to a new non-conformance? Attaching files is only available after the first save. Save, click **Go to non-conformance**, and then open **File list**.

Can I change the status without closing? Yes. In an existing non-conformance, choose a different status in the **Status** field in the **General details** section and click **Save**. Closing is only done through **Close non-conformance**.

I don't see the + button to create a non-conformance. You have view-only permission, or your role isn't allowed to open non-conformances in the project. Contact the project manager.

See also

- Tasks – The tasks created from sending, and reminders for the expected closing date.
- Reports – A consolidated **Non-conformance report** by filters, with export.
- Common tools – The location picker, attaching files, export, pinning, and copying a link.
- Settings – Set up your saved signature.

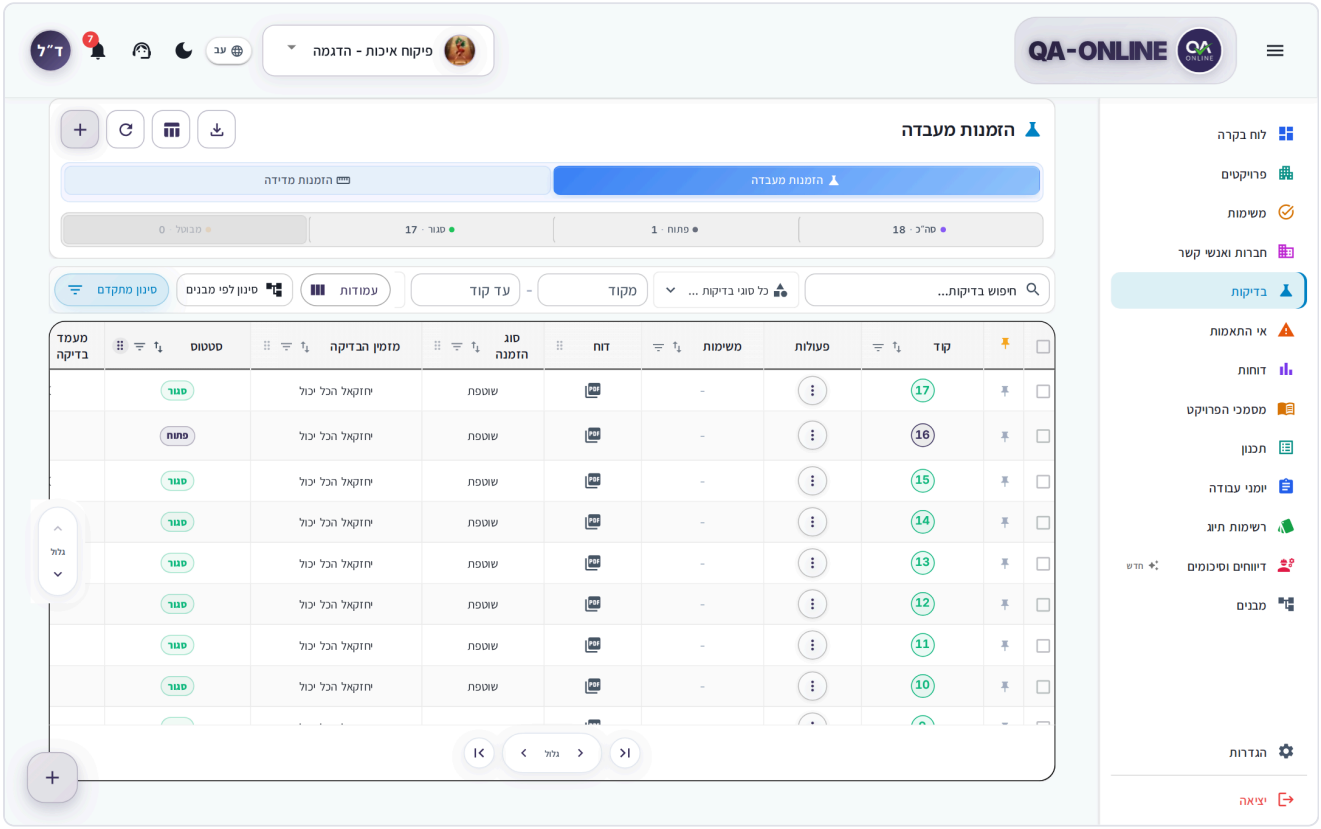
Tests

Order lab tests and surveys, track their progress, and record the results, all in one place.

This module has two types of orders:

- **Lab Orders** – Samples of materials (concrete, asphalt, aggregates, steel, and so on) that are sent to an accredited lab.
- **Survey Orders** – Measurements by a licensed surveyor (heights, levels, position deviations, and so on).

Inspectors and quality managers create orders, lab or survey staff enter results and certificates, and then the order is closed. A passing result is marked **OK**, and a failing result is marked **NC**.



Lab Orders screen in card view

Switch between lab orders and survey orders

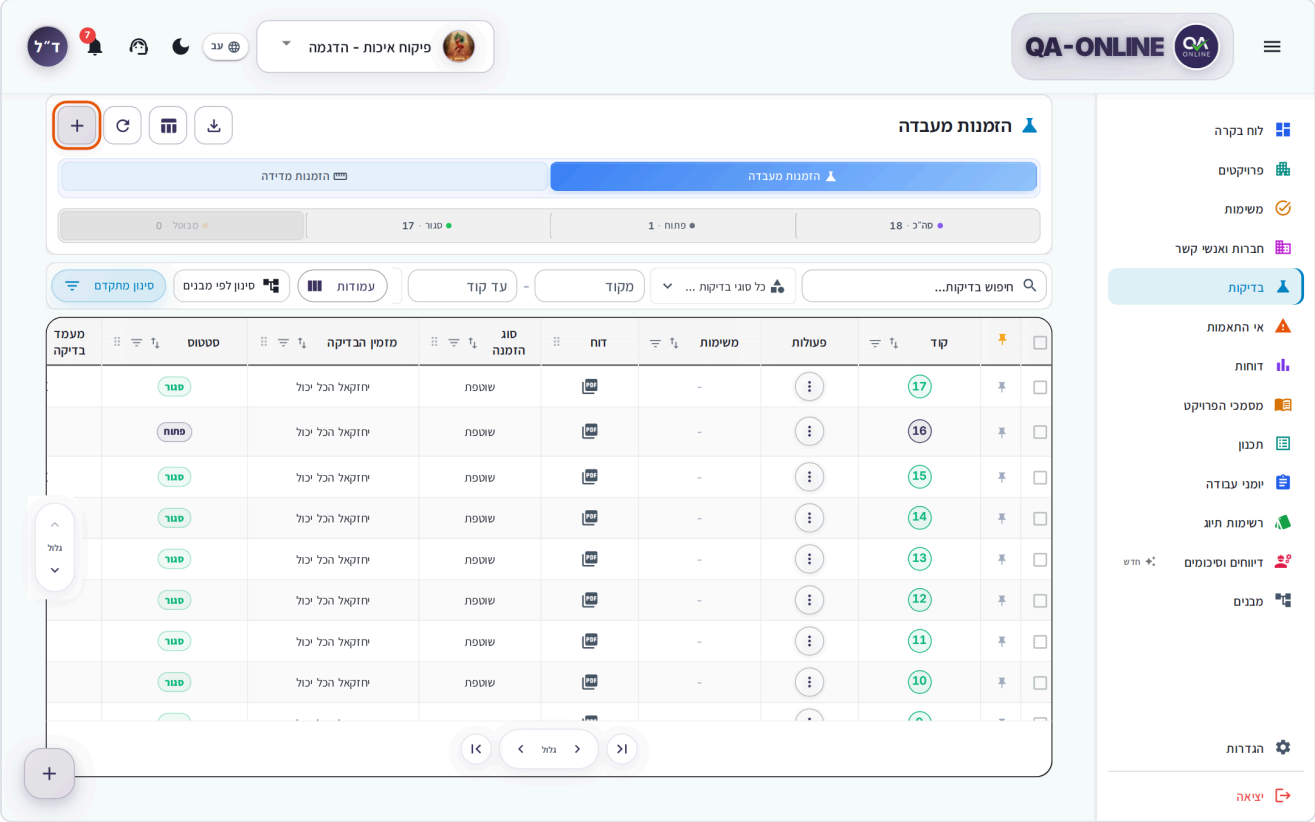
- **From the side menu:** Click **Tests**. In the grouped menu, you can also open the arrow next to **Tests** and choose **Lab Orders** or **Survey Orders**.
- **From the screen:** At the top of the screen, there's a **Lab Orders | Survey Orders** switch.

QA-Online remembers which tab you worked in last and opens it the next time you click **Tests**.

> **Don't see this option?** If you only have permission for one of the types, the switch doesn't appear and you only see your type. Permissions are set by your role in the project. If a module or button is missing, contact the project manager or your organization's system admin.

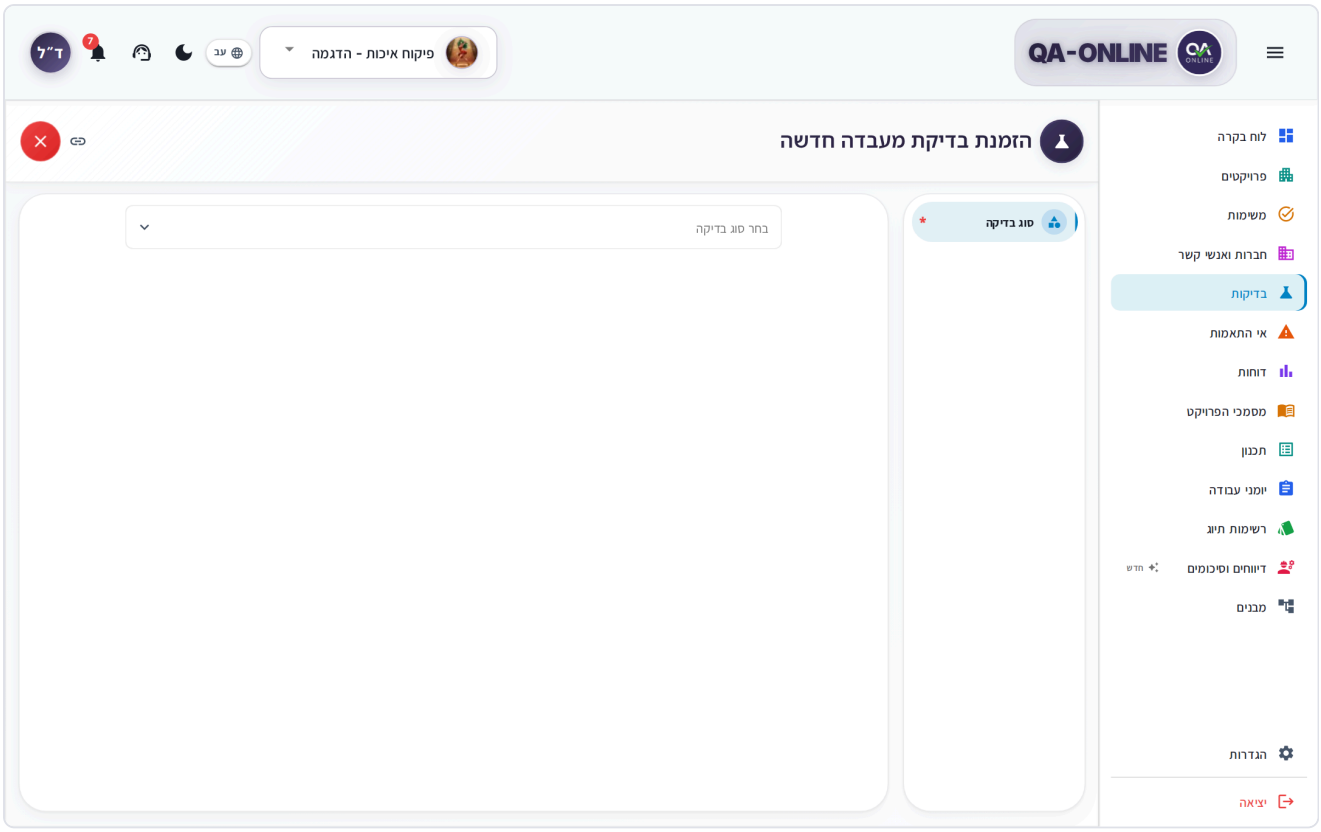
Create a lab order

1. In the side menu, click **Tests**, and make sure you're on the **Lab Orders** tab and the right project is selected.
2. At the top of the screen, click **+** (**Create lab order**).



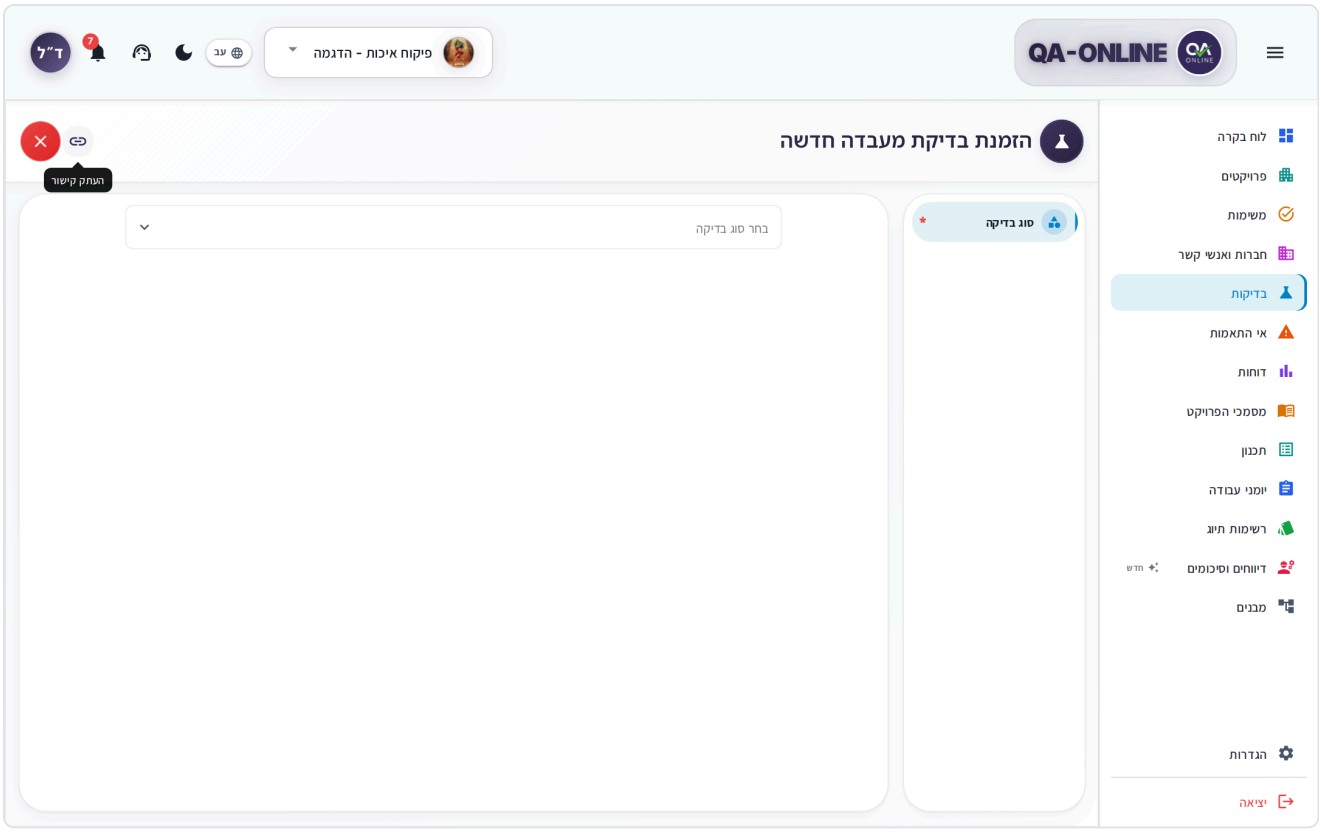
Lab Orders screen with the + button at the top highlighted

3. The **New lab test order** window opens. In the **Test type** section, choose the order type (for example **Ongoing** or **Preliminary**). The list of types depends on your role, and the other sections only appear after you choose one.



New lab test order window, with the Test type field

4. In the **Order details** section, fill in the fields in order:
    - **Sampling date**, **Sampling time**, and **Accuracy** (**Exact** or **Estimated**), followed by **Execution date**.
    - **Sampled quantity** and **Unit of measure**.
    - **Contractor** and **Performed by** (the lab).
    - **Select structure** – The location the sample was taken from. You can select several elements and click **Add location** for another path. See Common tools.
    - **Location details** – A written description, if needed.
    - **Manufacturer**, **Category**, and **Product/material**.



New lab test order window with the order details

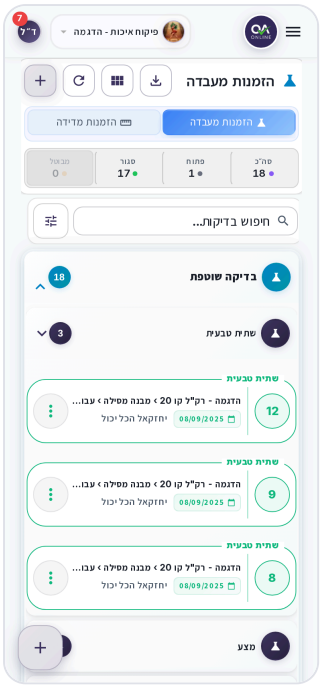
5. In **Tests to perform**, choose what the test list is built from (**Test list by**): category, product/material, or **Add test group**. For an additional test, click **Add new row**.
6. If needed, fill in **Lab certificate number**, **Temporary certificate number (lab)**, and **Notes**.
7. Click **Save**.
8. In the **Test order created successfully!** message, click **Go to order** or close the window.

> **Note:** **Sampling date**, **Sampled quantity**, and choosing an element in a structure are required fields. Without them, the order won't save.

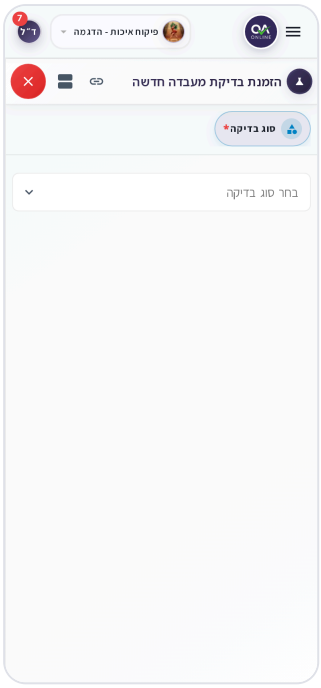
> **Important:** Saving the order records it in the system. QA-Online doesn't show a confirmation that an email was sent to the lab or the surveyor, so let them know in whatever way your project usually does.

On your phone

1. In the list, tap **+** at the top of the screen or the floating button.
2. Tap **Select test type** and choose a type. Move between sections with the **Next** button at the bottom. In the last section, it becomes **Save**.



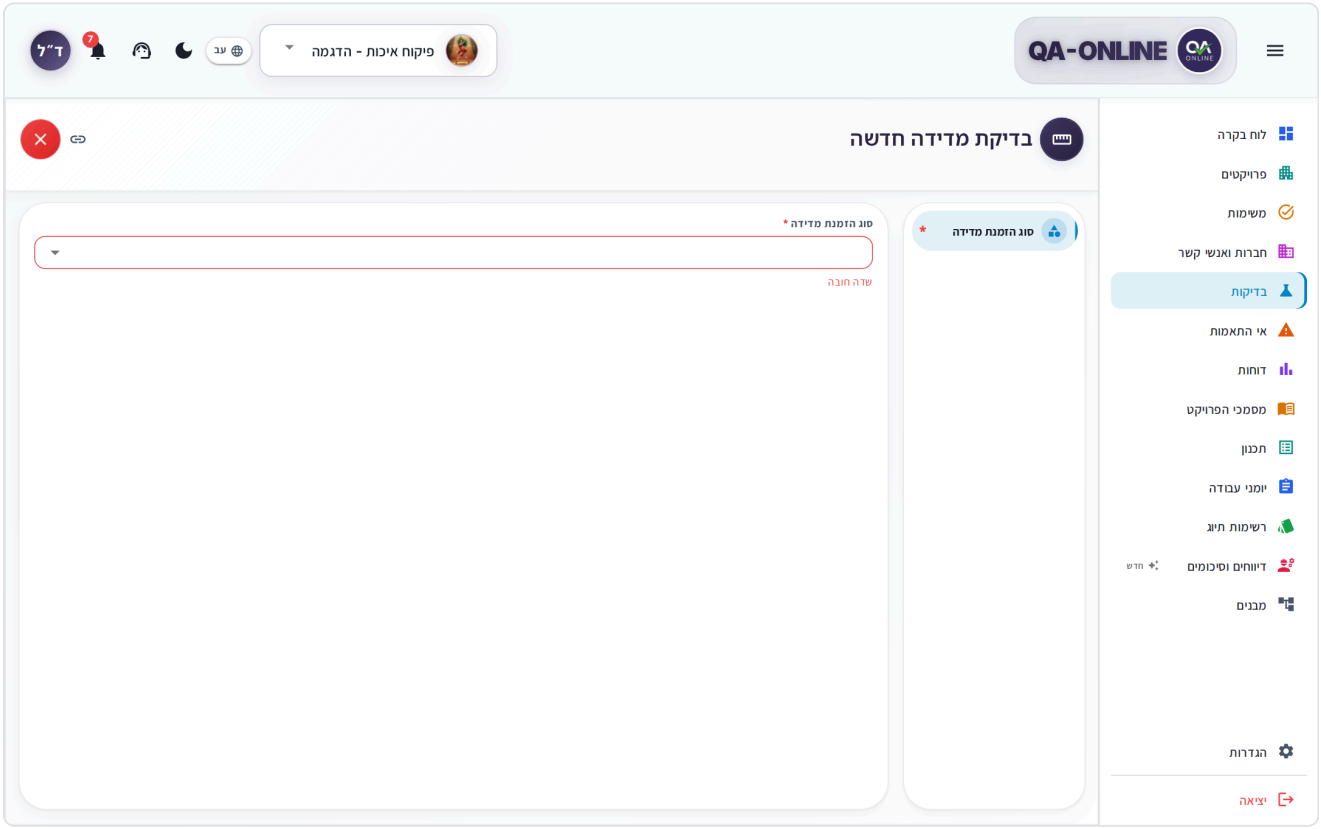
Lab orders on a phone, with an open group of order cards



New lab test order window on a phone, with the test type selection

Create a survey order

1. Switch to the **Survey Orders** tab and click **+**. The **New survey test** window opens.

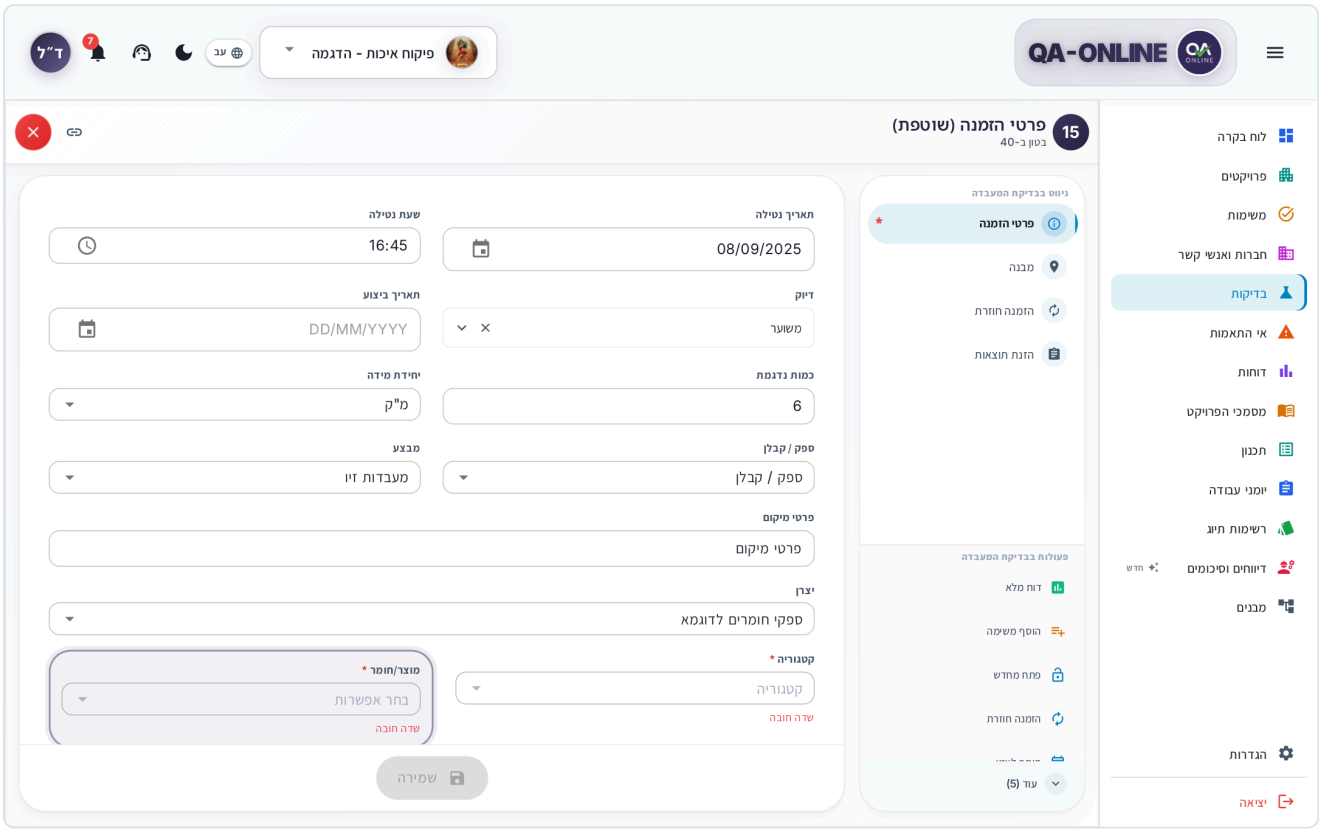


New survey test window, with the Survey order type field

2. In the **General details** section, choose a **Survey order type**, then a **Survey company**, followed by a **Surveyor** or **Contact** (the list only loads after you choose a company).
3. Fill in **Order date**, **Survey date**, **Contractor**, and **Notes**.
4. In the **Select elements** section, choose the location on site.
5. Click **Save**. The message **Order created successfully!** appears.

Edit an existing order

1. Click the card or the row (or use the three-dot menu: **Order details**). The Detail window opens, with the order type in the title.



Detail window of an existing lab order, with the sections menu on the side

2. In the side menu, choose the section:
   - **Lab order** – **Order details**, **Structure**, **Reorder inspection**, and **Enter results** (under **Navigate in lab test**). Actions on the order are under **Operations in lab test**.
   - **Survey order** – **Order details**, **Structure**, and **Enter results** (under **Navigate in survey test**).
3. Edit the fields.
4. Click **Save**. The message **Test order saved successfully** appears (or **Survey order saved successfully**).

> **Note:** After results are entered for a lab order, **Order details** and **Structure** become read-only. Only a role with permission to edit after results (for this order type) can change them. If you try to save without permission, **You don't have permission to save changes.** appears.

Tests don't have a duplicate action. To place another order for the same sample, use a reorder.

On your phone

Tap the type group (for example **Ongoing test**) to open it, then tap the order card (see the list above). The order opens in full screen, with the sections stacked one below the other; **Save** is at the bottom of the screen.

What you see on the screen

At the top of the screen: the title (**Lab Orders** or **Survey Orders**), view mode, export, **Refresh**, and a **+** button for a new order (**New lab order** or **New survey order**).

The row of counters filters the list when you click one:

Counter	Meaning
Total	All orders
Open	Orders still in progress – waiting to be carried out or waiting for results
Closed	Orders that were completed and closed
Canceled	Orders that were canceled

View modes

- **Table** (on desktop) – Columns such as **Code**, **Order type**, **Ordered by**, **Status**, **Exam status** (OK / NC), **Certificate**, **Opening date**, **Requested date**, and location. Click **Columns** to choose columns and change their order.
- **Cards** – In lab orders, cards are grouped by **Ongoing test** and **Preliminary test**, and within each group by category.
- **Calendar** – Orders by date.

When the list is empty or won't load

- If there are no orders in the project, **No tests available** appears. If you have permission to create, click **Create your first lab order** (or **Create your first survey order**).
- If no project is selected, **Please select a project to see tests** appears.
- If the filters return no results, **No results match your filters** appears. Click **Clear filters**.
- If loading failed, **Couldn't load tests** appears. Click **Retry**, and if the problem continues, click **Open a support ticket**.

Search and filter

1. Type in the **Search tests...** field.
2. For a range of codes, fill in **From number** and **To number**.
3. To see only one type, choose **Lab test type** (or **Measurement test type**).
4. To filter by location, click **Filter by structures**, choose a sub-project, structure, structure part, or element, and click **Filter**.
5. For a date range, click **Advanced Filters** and fill in **From date** and **To date**.
6. To change the order, choose **Sort by**: **By opening date**, **By test code**, or **By contractor**.

Active filters appear as tags above the list. **Clear all** removes all of them.

> **Tip:** Filtering by result is only available from the Dashboard: clicking test data there opens Lab Orders filtered by **Pass**, **Fail**, or **No status**. The filter appears as a **Result: …** tag above the list, and clicking the X removes it. There's no button for this filter on the Tests screen itself.

Send a test order from a checklist

A test step in a checklist creates an order directly from the step:

1. In the checklist, click the lab test step and fill in the sample details.
2. Click **Create test**.
3. In the **Send test order** window, click **Send order**. The order is created, the step is signed, and the message **Test order sent successfully** appears.

The order also appears in the **Lab Orders** list. Survey steps work the same way, with the **Create survey** button. For details, see Checklists.

Reorder a test

A reorder is a new order created from an existing lab order, for example after a failing result:

1. Open the lab order and choose **Reorder inspection** in the side menu (or in the options menu on the card).
2. The details load from the original order. Change whatever you need.
3. Click **Save**. A new order is created, and the window switches to it (**The new order has been loaded**).

> **Don't see this option?** **Reorder inspection** only exists in lab orders. Changing its fields requires the right permission in your role.

Enter results: lab order

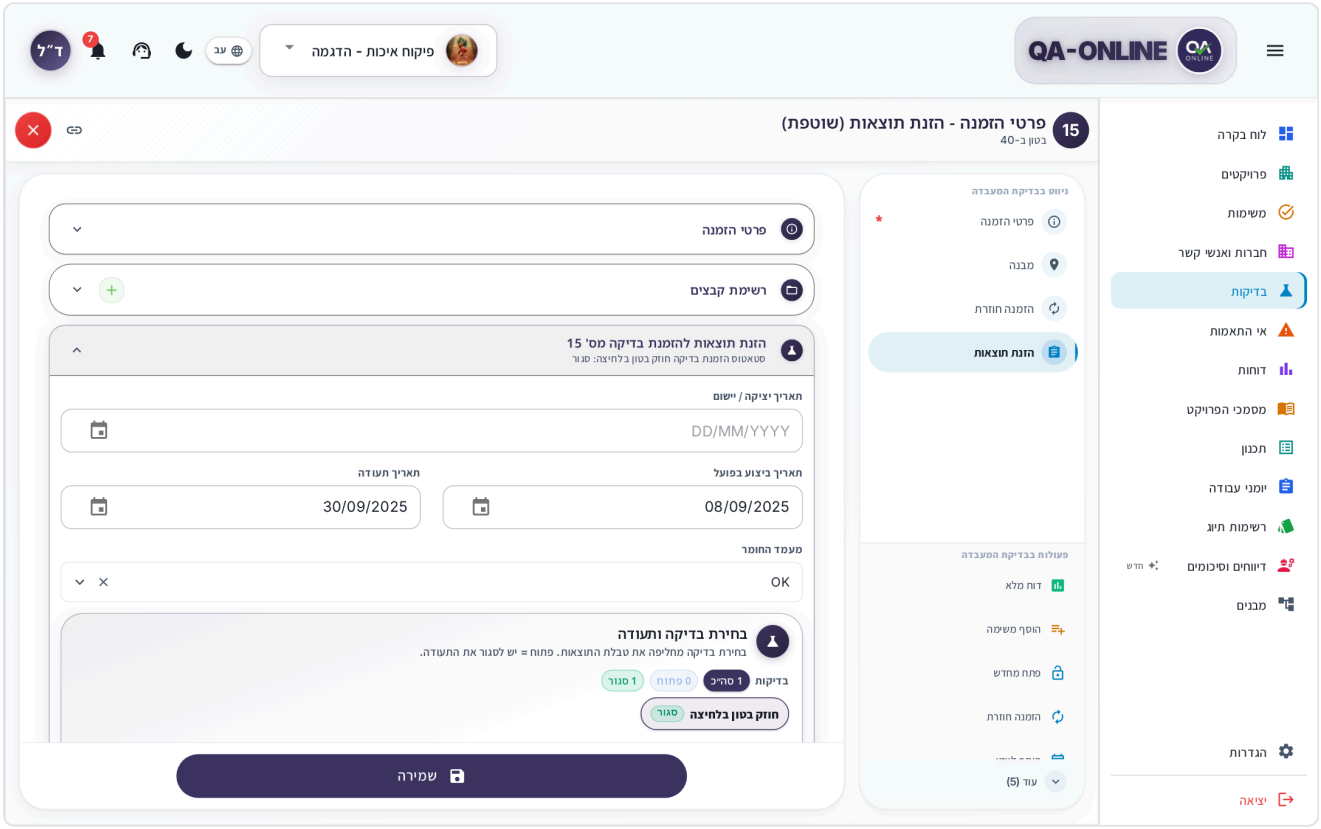
1. Open the order and choose **Enter results** (or, in the options menu on the card: **Enter results**).

2. In the **Select test and certificate** section, choose the test. If there are several certificates, move between them with **Previous certificate** / **Next certificate**.
3. Fill in the result values in the table, according to the test parameters.
4. Fill in **Certificate number**.
5. In the **Material status** field, choose **OK** (Pass) or **NC** (Fail).
6. To attach the lab certificate or other files, click **Upload files**.
7. Click **Save**. The message **Data saved successfully** appears.
8. When the results for the certificate are final, click **Close certificate**. From then on, the results are locked for editing.

If you need to correct a closed certificate, click **Open certificate**.

> **Note:** **Close certificate** is only available after you've filled in **Certificate number**.

> **Tip:** The **Open** / **Closed** counters at the top of the section show how many certificates are still open. You can filter with **Show open tests** or **Show closed tests**.



Entering results in a lab order

Enter results: survey order

1. Open the survey order and choose **Enter results**.
2. Choose the **Survey status**: **OK** or **NC**.

3. Fill in **Certificate number** and **Notes**.
4. In the **Files** section, click **Upload files** to attach the survey file.
5. Click **Save**. The message **Survey results saved successfully** appears.

Close an order

Lab order

1. Make sure all the certificates in the order are closed (see above).
2. Open the order and click **Close order** – under **Operations in lab test** or in the **Enter results** section.
3. In the **Close order** window, click **Close order**. The message **Test order closed** appears.

Close order is only inside the order window – not in the card menu and not in multi-select. As long as a certificate is open, the button is gray.

Survey order

1. Open the order and go to **Enter results**.
2. Fill in the result and click **Close order** at the bottom of the window.
3. In the **Close order** window, click **Close order**. The message **Survey order closed** appears.

Cancel an order

1. In the order's options menu, choose **Cancel order**.
2. Confirm in the **Cancel order** window (or **Cancel survey order**) by clicking **Cancel order**.

The order moves to the status **Canceled**. For a canceled lab order, only **Reopen** and **Full Report** remain in the menu.

> **Note:** Survey orders can't be reopened – not after closing and not after canceling. Make sure you chose the right order before you confirm.

Reopen a lab order

You can return a closed or canceled lab order to the Open status:

1. In the options menu, choose **Reopen**. There's no confirmation window.
2. The order returns to the list as an open order and is highlighted there.

Change the order type or orderer

Both actions exist in lab orders only, from the options menu or from multi-select:

- **Change order type** – The window shows **Test code:**, **Test name:**, and **Current order type:**. Choose a new type and click **Change order type**. When you switch to the **Repeat** type, you also need to enter the **Original order** number.
- **Switch user** – In the **Change performing user** window, **Current user:** is shown. Choose a different **Username** in the project and confirm.

More actions from the options menu

Action	What it does	Available in
Order details	Opens the order window	Lab and survey
Enter results	Goes straight to entering results	Lab and survey
View files	The files attached to the order	Lab and survey
Full Report	A PDF of the order and the results	Lab and survey
Duplicate	A new order, pre-filled from an existing order	Lab and survey
Reorder inspection	A new order based on this one (see Reorder a test)	Lab
Change order type	See Change the order type or orderer	Lab
Switch user	Transfers the order to a different orderer in the project	Lab
Reopen	Returns a closed or canceled order to the Open status	Lab
Cancel order	Cancels the order (doesn't appear on an order that's already canceled)	Lab and survey
Add task	A task linked to the order. See Tasks	Lab and survey
Add to calendar	Adds it to your personal calendar	Lab and survey
Pin / **Unpin**	Pins it to the top of the list	Lab and survey

Lab order permissions in brief

Some actions in lab orders require a special permission in your role, in addition to access to the module:

- **Change order type**
- **Switch user**
- **Cancel order**
- **Close order**
- **Reopen**
- Editing order details after results were entered, and editing results the lab locked

If you don't have permission for an action, it appears grayed out in the menu and you can't click it. Users with view-only permission can open orders and generate reports. When they try to create, enter results, or make changes, the **No permission** window appears with the message **You don't have permission to perform this action.** – click **Got it**.

> **Don't see this option?** Permissions are set by your role in the project. Contact the project manager or your organization's system admin.

Act on several orders at once

1. Switch to the **Table** view and select the orders you want. In the bar that opens, **… selected** is shown.
2. Choose an action: **Pin** / **Unpin**, **Add task**, **Cancel order**, and in lab orders also **Change order type** and **Switch user**.
3. Confirm in the window that opens (for example **Cancel 3 orders?**).
4. To clear your selection, click **Clear selection**.

Actions you don't have permission for don't appear in the bar. Closing orders is only possible from inside the order window.

Export to Excel

1. Filter the list, or select orders in the table view.
2. Click the export button at the top of the screen (**Export lab orders** or **Export survey orders**).
3. The file is prepared in the background. Progress appears in the corner of the screen, and when it's done, a preview opens with an option to download.

The file includes only the orders shown based on the filters, or only the ones you selected. See Common tools.

Share an order link

1. Open the order.
2. In the window title, click **Copy link** (on a phone: **Share**).

The link opens the order directly, for anyone who has access to the project. The preview of the **Full Report** also has an option to copy a link.

Frequently asked questions

Why is "Close order" gray in a lab order? The order has a certificate that isn't closed yet, or you don't have permission to close orders. Close all the certificates in **Enter results** and try again.

What's the difference between "Duplicate" and "Reorder inspection"? Duplicate opens a new order window, pre-filled from an existing order. **Reorder inspection** loads the original order inside the Detail window, and when you save, it creates a new order from it – for example, after a failing result.

I don't see the switch between lab and survey. The switch only appears for users who have permission for both types.

I corrected a mistake in a result, but the fields are locked. The certificate is closed. Click **Open certificate**, make your corrections, save, and close it again. If the fields are still locked, the lab locked the results and a special permission is required – contact the project manager.

Does saving an order send an email to the lab? The system doesn't show a confirmation like that. Let the lab or the surveyor know in whatever way your project usually does.

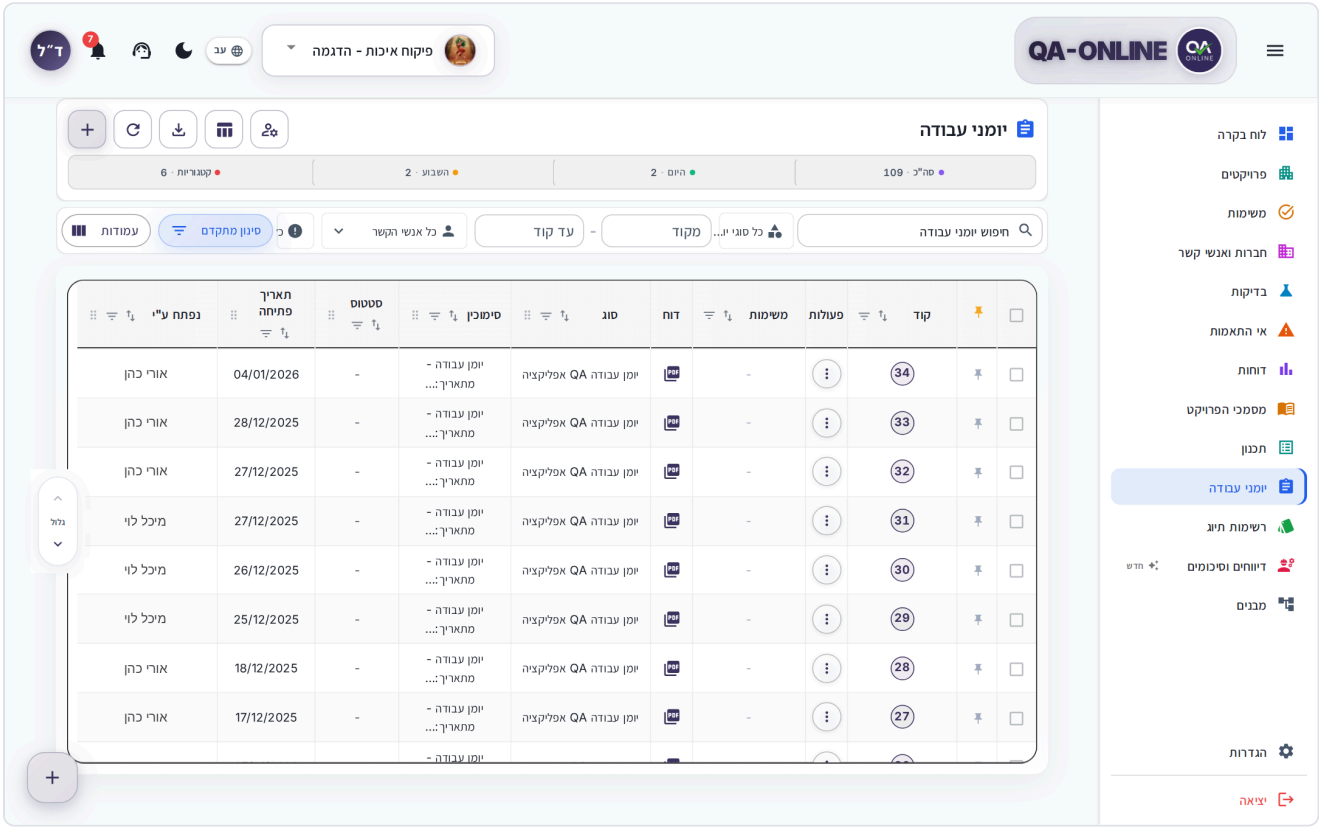
See also

- Checklists – Ordering a test from a step in a checklist.
- Dashboard and projects – Test data and filtering by result.
- Tasks – Tasks linked to orders.
- Common tools – The location picker, export, PDF reports, and copying a link.

Work logs

Record what happened on site each day – workforce, equipment, weather, work performed, and signatures – and send the log for approval.

Foremen and inspectors fill in a work log at the end of each workday or during it. Project managers and quality managers review the logs, approve them, and generate a PDF report from them. Work logs, Project documents, and Field reports are built on the same platform. This chapter fully explains the topics all three share: tables, missing signatures, and the approval process.



Work Logs screen in table view, with the metrics bar and the filters

> **Don't see this option?** Not every user sees every module and action. Permissions are set by your role in the project. If a module or button is missing, contact the project manager or your organization's system admin.

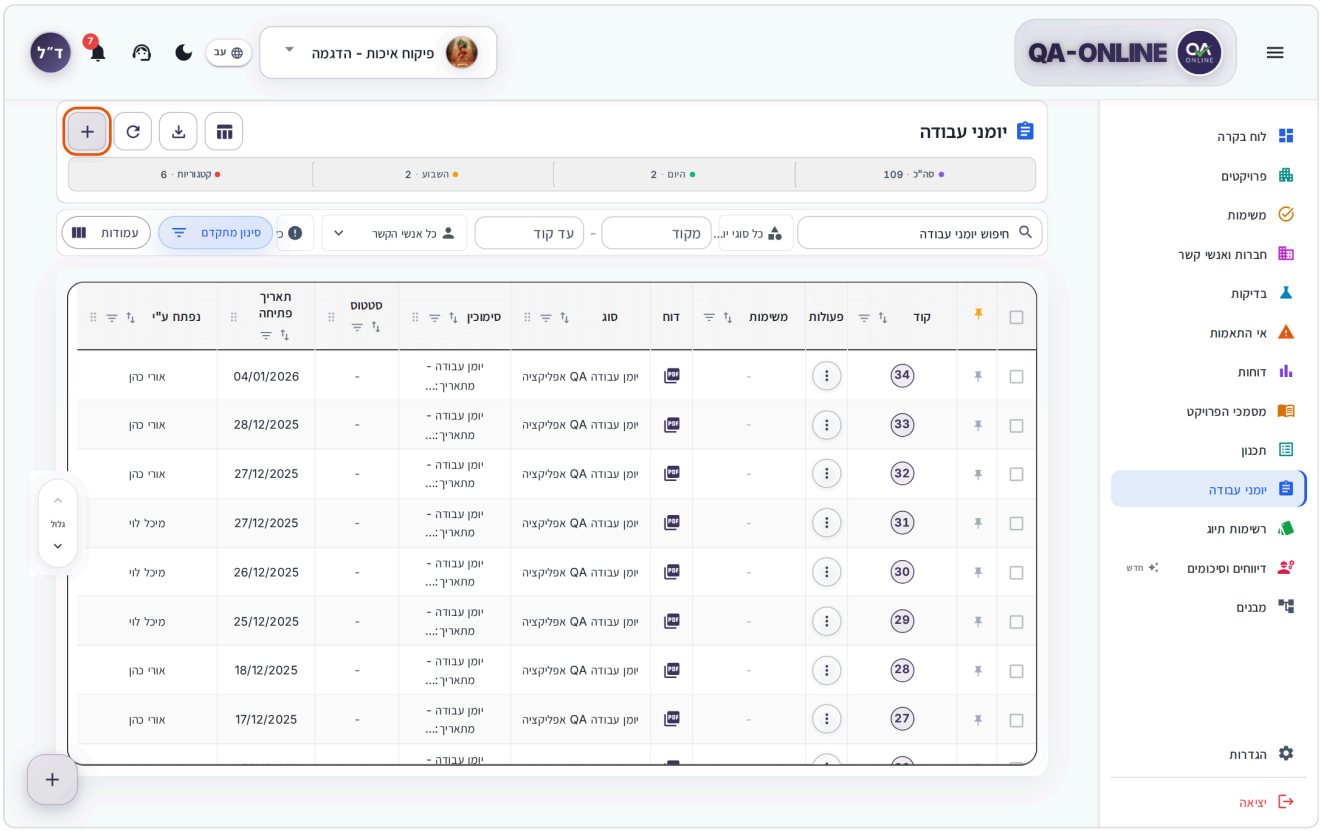
Open Work Logs

1. Choose a project in the **Project selector** in the top bar.
2. In the side menu, click **Work Logs**.

If no project is selected, the message "Please select a project to see work logs" appears.

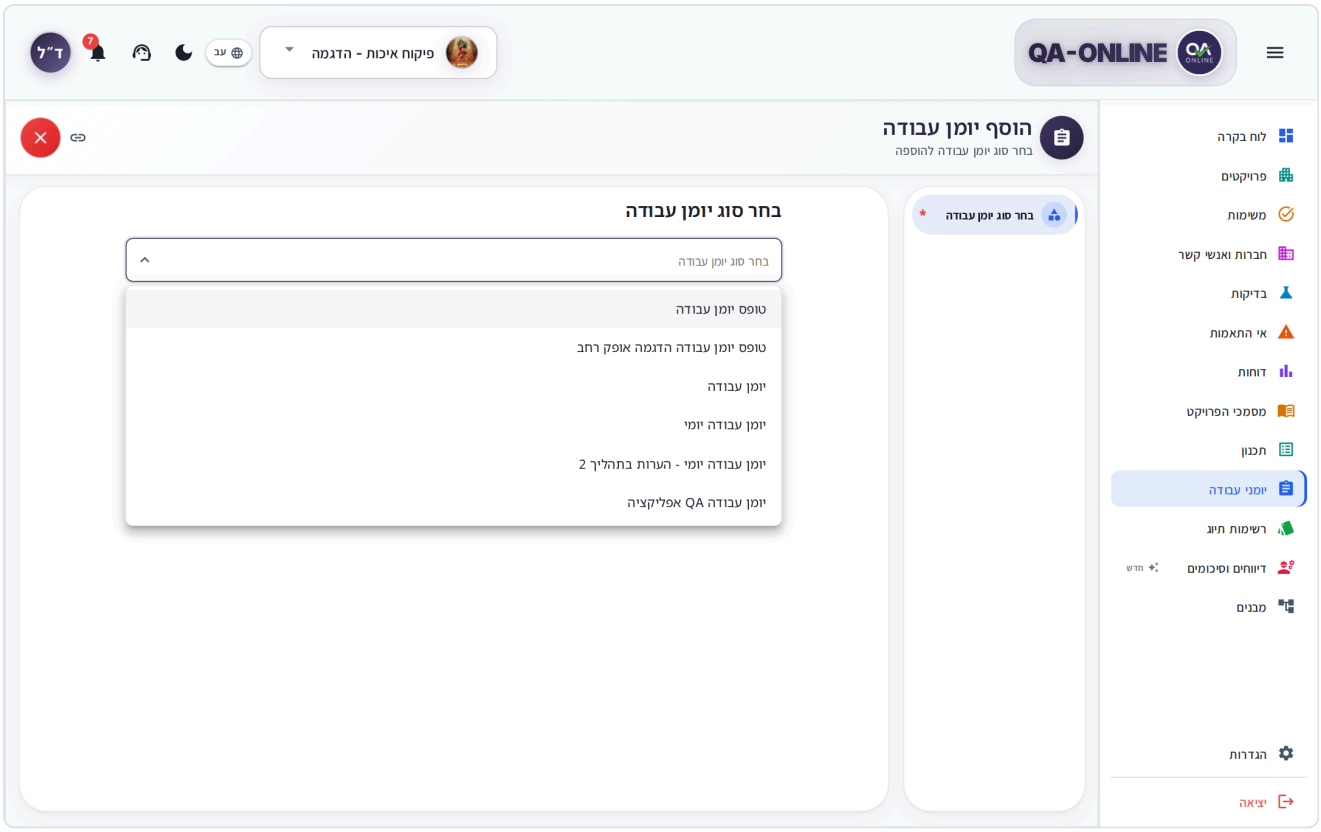
Create a work log

1. In the side menu, click **Work Logs**, and make sure the right project is selected.
2. At the top of the screen, click **+** (**Create New Work Log**). You can also use the round **+** button in the corner of the screen.



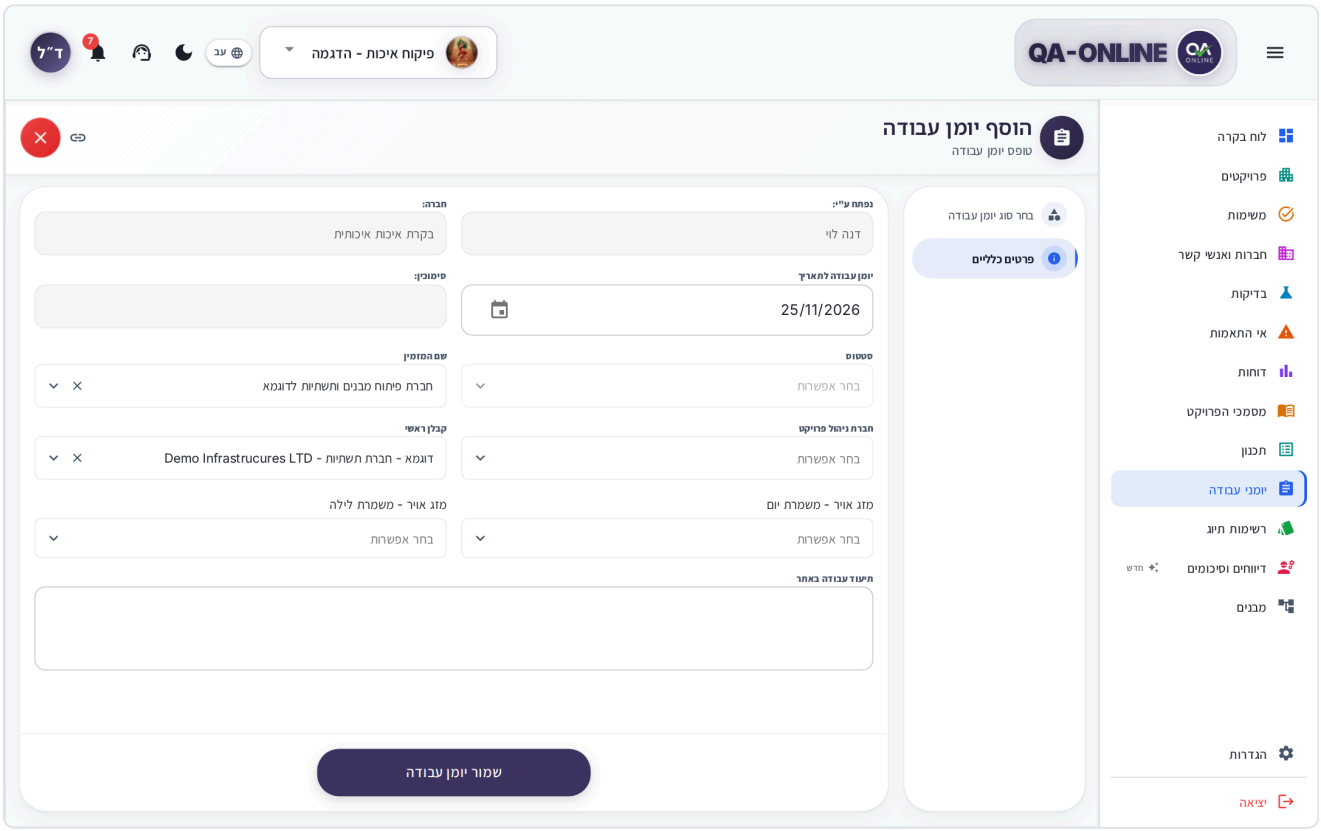
Work Logs screen with the + button at the top highlighted

3. The **Add work log** window opens. In the **Type** section, open **Select work log type** and choose a type.



Add work log window, with the type list open

4. In the **General details** section, check the log's **Date** (default: today) and fill in the remaining fields, for example contractor, shift, and weather. Required fields are marked with an asterisk.



General details section in a new log, with the date and the Save Work Log button

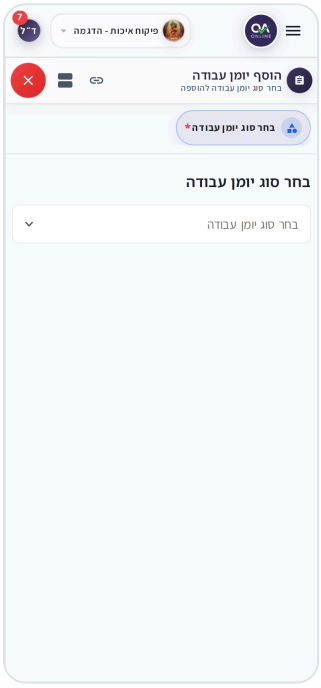
5. If the template has a **Structure** section, choose a location. For details, see Location picker.
6. Click **Save Work Log** at the bottom of the window.
7. In the **Work log created successfully!** message, click **Go to work log**, and fill in the tables (workforce, equipment, and more). See Fill in tables and rows.

> **Tip:** Weather fields are filled in automatically based on the project location and the log's date. For a future date, or when the project location isn't recognized, the field isn't filled in – choose a value yourself.

> **Note:** If the log type is set to allow one log per day, you can't save a second log of the same type for the same date. The **Existing work log** window opens with the message "A work log of this type already exists on this date in the project." Click **OK**, then change the date or open the existing log.

On your phone

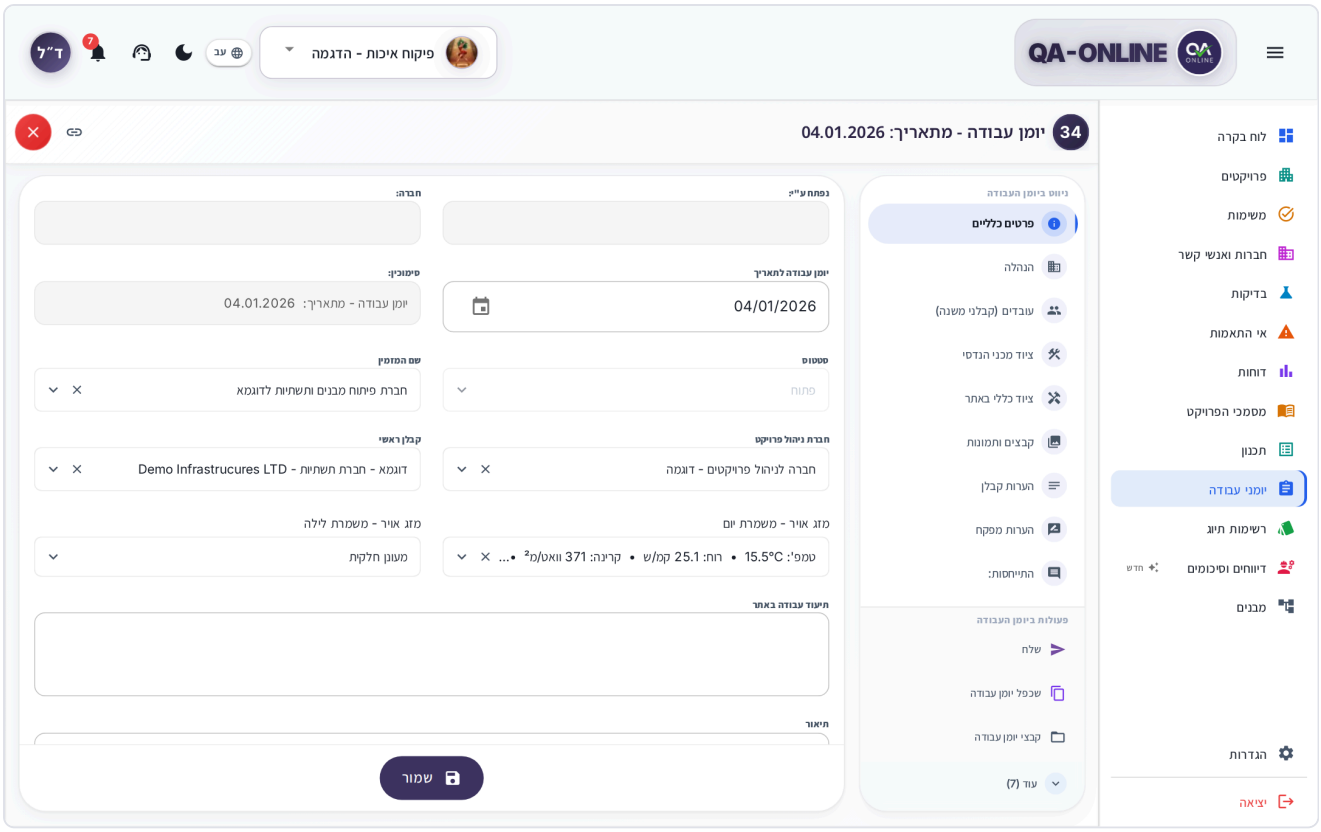
1. In the list, tap **+** at the top of the screen or the floating button.
2. Tap **Select work log type** and choose a type. If required fields are missing in another section, the save button changes to **Next** and takes you to the missing section.



Add work log window on a phone, with the type selection

Edit a work log

1. Click a row in the table or a card (or in the card's **Options** menu: **Edit Work Log**). The Detail window opens, with the log type and its date in the title.



Work log Detail window, with the sections and actions menu on the side

2. In the **Navigate in work log** menu, choose a section: **General details**, special fields (such as location), tables, or the process steps. A section with empty required fields is marked with an asterisk.
3. Edit the fields or the table rows.
4. Click **Save** at the bottom of the window.

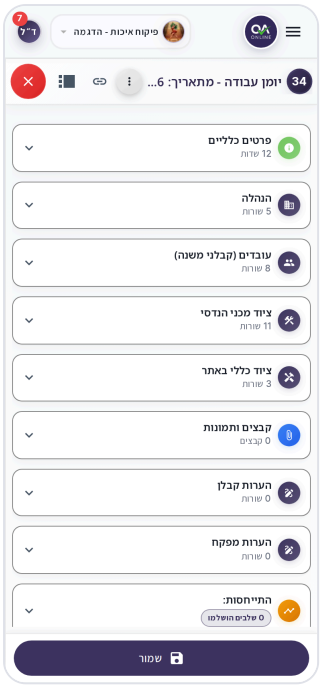
Next to the navigation menu, you'll see **Operations in work log**: send, history, files, duplicate, add task, reports, and more. Actions that don't fit in the bar are under **More**.

If the log is locked for editing, for example after its process has ended, the fields are shown as read-only and there's no **Save** button. See Correct a closed work log.

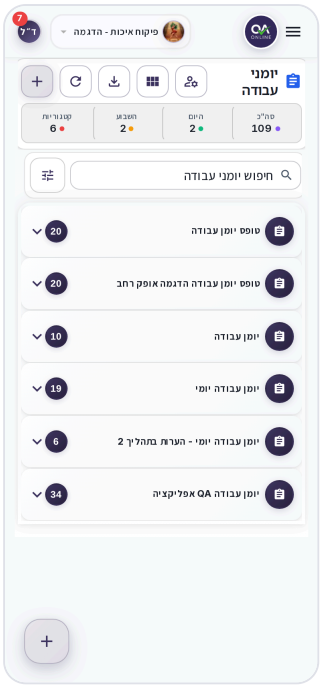
> **Don't see this option?** If the menu shows **View Work Log** instead of **Edit Work Log**, you have view-only permission. Contact the project manager.

On your phone

Tap the type group, then tap the log's card. The log opens in full screen, with the sections stacked one below the other and the number of fields in each. Tap a section, make your changes, and tap **Save** at the bottom.



An open work log on a phone, with the list of sections

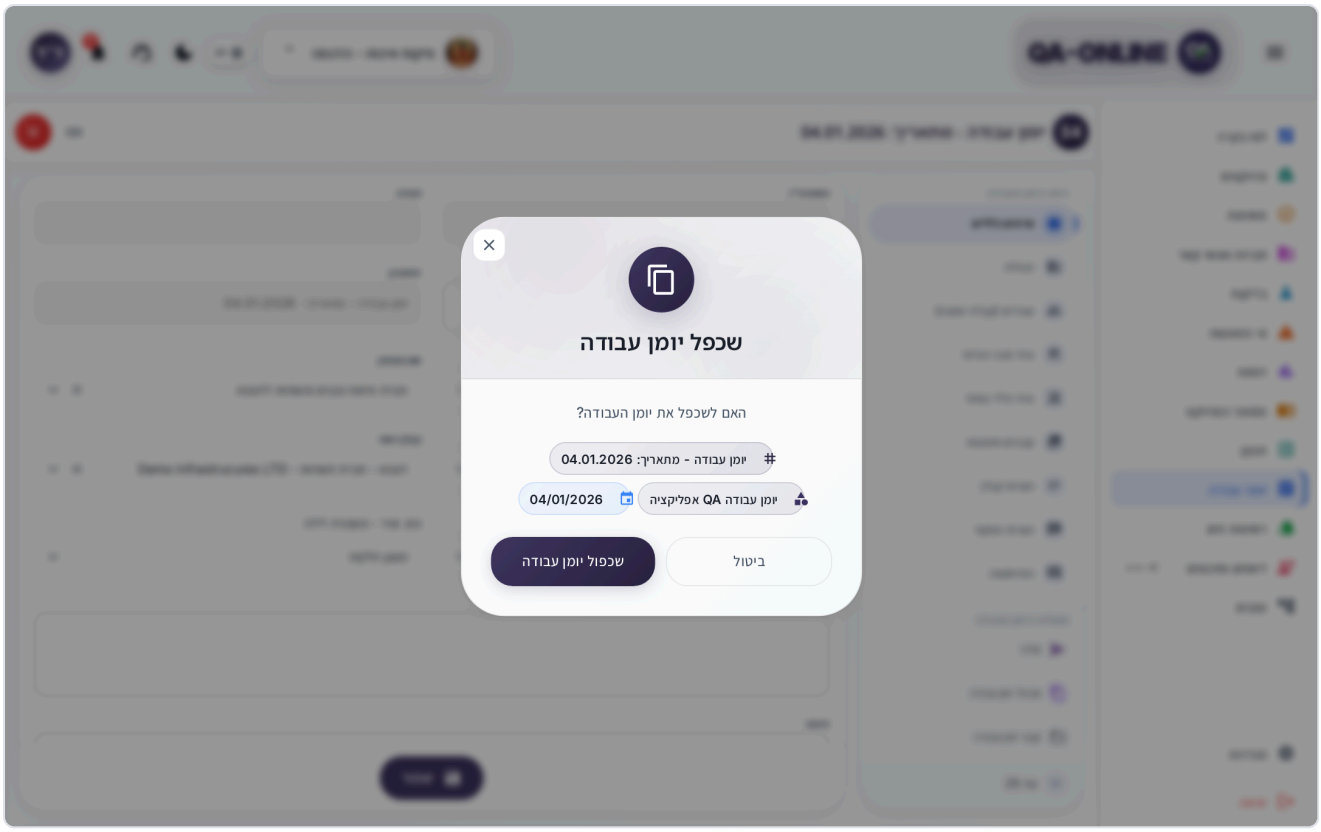


Work log on a phone in card view

Duplicate a work log

Duplicating creates a new log with the data from an existing log – useful when each day is similar to the one before.

1. Open the original log, and in the actions on the side of the window (or in the card menu), click **Duplicate Work Log**.
2. In the **Duplicate Work Log** window ("Do you want to duplicate this work log?"), check the type and date shown, and click **Duplicate Work Log**.



Duplicate Work Log confirmation window, with the log type and its date

3. In the duplicate window that opens, check the general details and **update the date** to the new day.
4. Click **Duplicate Work Log** at the bottom of the window. The new log is created and opened.

What's copied and what isn't: The new log gets the fields and the table rows of the original. Fields and tables that your organization set not to be duplicated stay empty, and version files aren't copied. The tables aren't shown in the duplicate window, but they're copied when you save – open the new log to update them.

> **Note:** The limit of one log of the same type per date applies to duplicating as well. Choose a date that doesn't already have a log of this type.

On your phone

In the open log, tap the three dots (**More options**) and choose **Duplicate Work Log**. The rest is the same as on desktop.

Find a work log

Views

Click the **View mode** button in the header and choose:

- **Table** – One row per log. Good for quick scanning and for working on several logs at once. Available on desktop only.

- **Cards** – One card per log, grouped by type.
- **Calendar** – A calendar. Click a date to see its logs. If there are no logs on a date, the message "No work logs for this date" appears.

Header metrics

At the top of the screen, you'll see the counters **Total**, **Today**, **This week**, and **Categories**. Click **Today** or **This week** to show only the logs opened in that period. Clicking again clears the filter.

Search and filter

1. Type a word or a code in the **Search work logs** field.
2. Choose a type in **Work Log Type** (default: **All work log types**). Next to each type, you'll see the number of logs it has.
3. To narrow to a range of codes, fill in **From Code** and **To Code**. The filter updates when you leave the field or press Enter.
4. Choose the person who opened the log in **Contact** (default: **All contacts**).
5. Choose a **Status** (default: **All statuses**).
6. To filter by dates or by additional columns, click **Advanced Filters**, fill in **From date** / **To date** or choose values, and click **Save**.

Below the filters, you'll see the number of logs found, for example "12 of 40 work logs". To clear all filters, click **Clear all**.

Choose table columns

1. In the **Table** view, click **Columns**.
2. Select or clear columns. Drag a column to change the order.
3. Click **Done**. To return to the default, click **Reset columns**.

The basic columns are: **Code**, **Actions**, **Tasks**, **PDF**, **Type**, **Reference**, **Status**, **Open date**, and **Opened by**. When you choose a single log type in the filter, the table also shows columns from that type's fields. Your choice is saved separately for each type.

> **Tip:** In the **PDF** column, there's a PDF icon that opens the log's full report, and an Excel icon that exports the log to an Excel file.

Fill in tables and rows

Some types have tables, for example workforce, equipment, approvers, or signed comments. Each table appears as its own section in the Detail window menu.

1. Choose the table in the side menu.
2. Click **Add row** (in an approvers table: **Add approver**).
3. Fill in the cells. In selection fields, choose a value from the list.

4. To delete a row, click the delete icon in the row (**Delete row**).
5. Click **Save** at the bottom of the window.

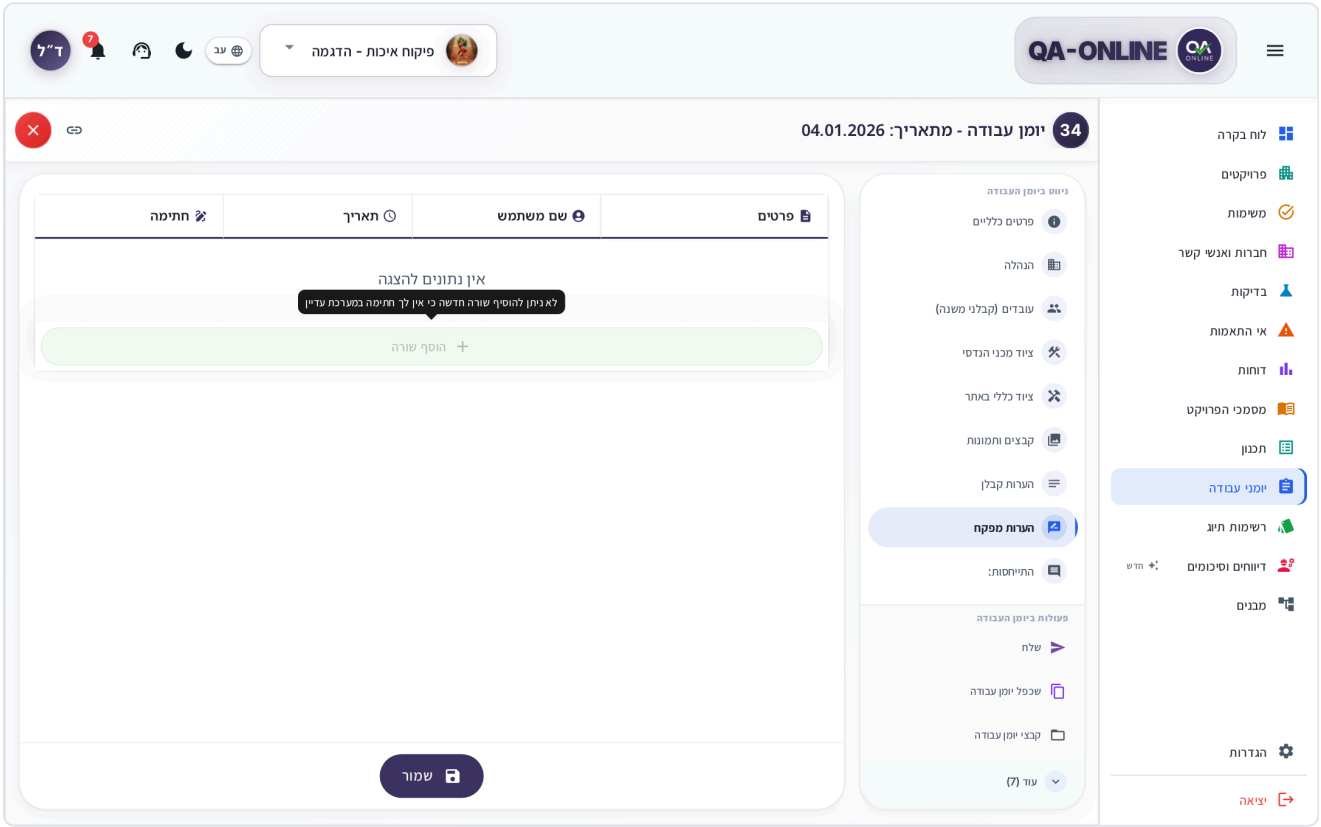
On a phone, the rows are shown as cards. Tap a card to open **Edit row**, make your edits and tap **Save**, or tap **Delete** to delete the row.

> **Tip:** In a signed comments table, you can cancel new rows that haven't been saved yet: click the X icon next to the table title (**Cancel new rows**).

Rows that require a signature

In approvers tables and signed comments tables (for example contractor comments or inspector comments), every new row is signed automatically: the system fills in your name, the date, and your saved signature, and these fields are locked for editing. That's why you can only add a row like this if you have a saved signature in the system.

If you don't have a saved signature, the **Add row** button (or **Add approver**) is gray. When you hover over it (on a phone: press and hold), the message "You cannot add a new row because you don't have a signature in the system yet" appears. In the other tables, you can keep working as usual.



A table with an inactive Add row button and the missing signature message

What to do when you have no signature

Users can't upload a signature themselves. Your organization's system admin or the QA-Online support team uploads the signature to your account.

1. Contact your organization's system admin and ask them to upload your signature. They do this from the user management screen – see For organization system admins.
2. If no one in your organization can do this, open a support ticket in the **User settings** category. Include the name of the table and the log's code, and write that you need a signature uploaded to your account. See Open a support ticket.
3. Prepare a clear image of your signature on a white background, in case they ask for it.
4. After the signature is uploaded, close the Detail window, reopen it, and try adding the row again.

Attach files and photos

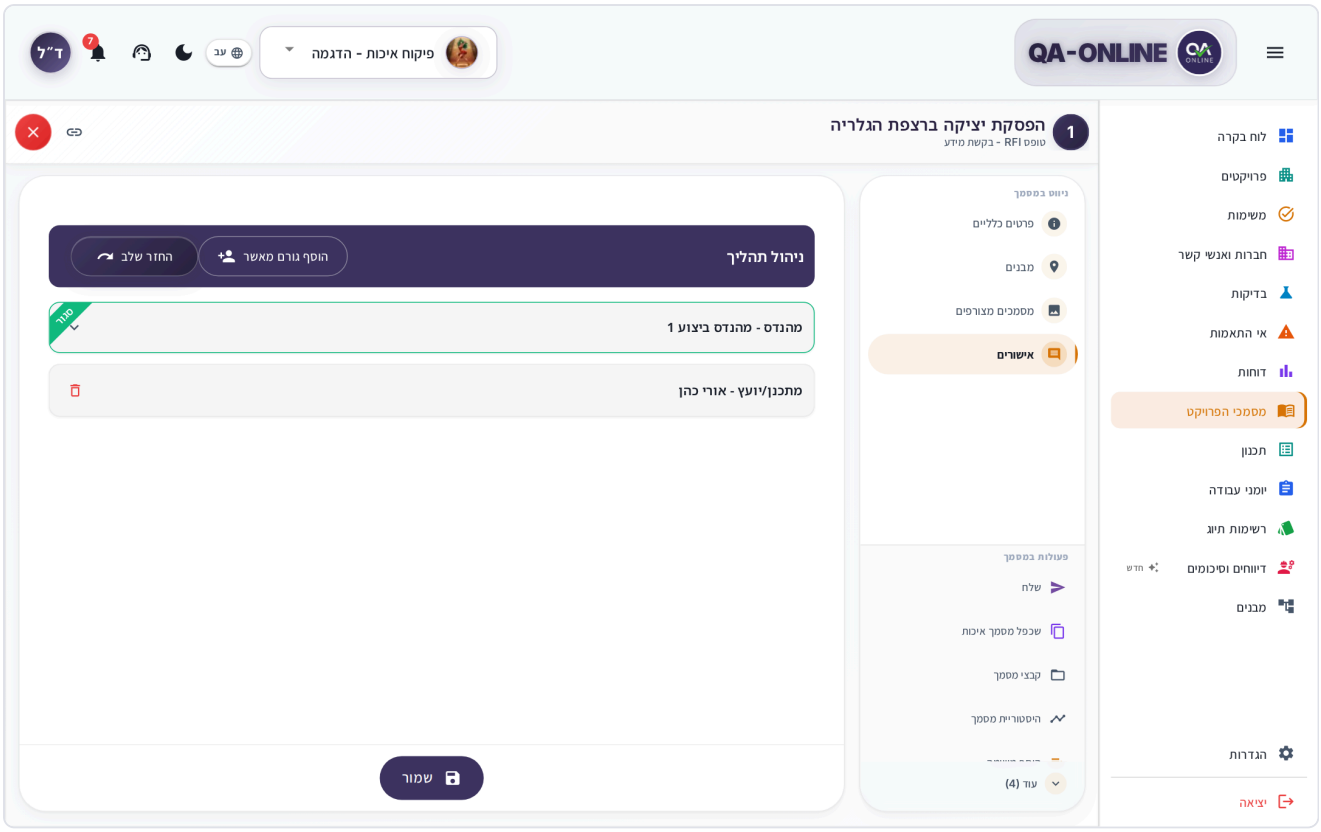
- **Inside a field or a row** – In file fields and file columns in a table, click the upload area or drag files onto it.
- **Log files** – Choose **Work log files** in the actions of the Detail window or in the card menu. The window shows all of the log's files, with a **All** / **Document files** filter. Click **Add files**, choose files, and click **Upload**.

For details on uploading, editing an image, and previewing, see Attach files and photos.

Approve, sign, and return a step

Most log types have an approval process set up in the organization: a sequence of **steps**, where each step is assigned to a specific party (for example a foreman followed by an inspector). The process is shown in the steps section of the Detail window, under the title **Process management**. The exact same process also works in Project documents and in Field reports.

When it's your turn, the log appears in your Tasks in the **Inbox**. Clicking it opens it directly at the right step.



The steps section in a document, with the process management bar and an active step with action buttons

Take action on a step

1. Open the log and go to the steps section.
2. On the active step (marked with a frame), you'll see the **Actions:** buttons. The button names are set in the process settings in the organization, for example approve or return for correction.
3. Click the relevant action. The **Comments/Notes** window opens.
4. Write your response in the **Comments/Notes:** field.
5. In **Transfer to:**, choose who the log goes to for further handling. This is a required field.
6. If needed, add recipients in **FYI:**. They only get an email, with no task.
7. Write a **Message:** and add **Attachments:** if needed.
8. Click **Send**.

> **Tip:** The options **Include the document report in the message** and **Include the comment in the message** are selected by default. Clear them if you don't want to attach the report or the comment to the email.

For a closing action, the **Close document** window opens instead, with the question "Are you sure?" Write a **Comment/Notes** and click **OK**.

The signature on a step is recorded from the saved signature in your account – you don't need to draw a signature.

What a completed step shows

A completed step is locked. Click it to see the details: **Name:**, **Role:**, **Company:**, **Status:**, **Execution date:**, **Signature:**, **Comment:**, and **Files:**. On the last completed step, you'll also see **Resend**, which sends the email to the next party again.

Manage steps

In the **Process management** bar, there are actions for users with permission:

- **Add approver** – Adds a step with another party to the process. Search by name, email, or contact code, and click **Save**.
- **Return step** – Cancels the last step that was completed and returns the log to the previous party. The question "The last step in the process will be returned. Confirm?" appears.
- **Delete process step** – The delete icon on a step that hasn't been completed yet.

> **Don't see this option?** Adding an approver, returning a step, and deleting a step require a special permission. Contact the project manager.

Statuses

A log's status reflects the state of its approval process. The common statuses:

Status	Meaning
Open	A step is waiting to be handled.
Closed	The process has ended.
Closed with non-conformance	The process ended with a non-conformance.

Status names are set for each log type in your organization's settings, so you may see additional names. The color code in the table and on the card reflects the status.

Send a work log by email

1. In the Detail window, click **Send**, or choose **Send** in the card menu.
2. Choose recipients from **Contacts:** or **Distribution list:**. For an address that isn't in the list, add it under **New email**.
3. Write a **Message:**.
4. Click **Send**.

Sending by email doesn't move the approval process forward. To move the log to the next step, use the action buttons in the steps section.

Generate a PDF report

1. In the Detail window or the card menu, open **Reports**.
2. Choose **Full Report** (the log with all its data) or **Empty Report** (a blank template of the type, to fill in by hand).
3. The report opens in a preview. You download it from there.

For the report of an earlier version, open **Work Log History**, choose a version, and click **PDF report**. More about the preview: Preview and download files.

Export the work log list

1. In the screen header, click the export icon (**Export Work Logs**).
2. In the **Export Work Logs** window, choose a **Work Log Type**.
3. Choose **ZIP** or **Excel**.
4. The file is prepared in the background, and you can keep working in the meantime. When it's ready, a preview opens and you download it from there. For a ZIP file, the preview shows the list of files inside it.

If you selected rows in the table, the export includes only those ("Export 5 selected rows. ZIP and Excel include only those items.").

> **Note:** If the export icon is gray and the message "Export is unavailable for this project" appears, export isn't enabled in the project. Contact the project manager.

For details on background preparation and ZIP files: Common tools.

Share a link to a work log

In the Detail window title, click **Copy link** (on a phone: **Share**). The link opens the log directly and switches to the right project. For details: Copy a link and share.

Pin a work log

A pinned log appears at the top of the list, in the **Pinned work logs** section. Pinning is personal to you and is saved separately for each project.

1. On a card, click the pin icon (**Add to pinned list**), or choose **Pin Work Log** in the menu.
2. To undo, click the pin again (**Remove from pinned list**) or choose **Unpin Work Log**.

More about pinning: Pinning and recent activity.

Act on several work logs at once

1. Switch to the **Table** view.

2. Select the checkbox on the rows you want, or select **Select all**.
3. In the actions bar that appears, choose **Pin**, **Unpin**, **Add task**, or **Delete**.
4. To see only the rows you selected, click **Show selected**. To clear your selection, click **Deselect all**.

> **Note:** Deleting several logs asks for confirmation ("Delete 3 work logs?") and can't be undone.

Correct a closed work log

Work logs can't be reopened. To correct a log whose process has ended:

1. In the Detail window (under **More**) or in the card menu, choose **Revise and submit**.
2. The action happens immediately, with no confirmation window. A new version of the log is created, and it returns to the approval process.
3. Open the log, make your corrections, and send it to the next step.

The previous version is saved in **Work Log History**. If the action fails, the message "Revise and submit failed" appears.

> **Don't see this option?** **Revise and submit** only appears on a closed log. If it's gray, the message "You lack the permissions to revise and submit" appears. Contact the project manager.

More actions

- **Work Log History** – Two tabs: **Work Log Versions** (for each version: **Files**, **Send**, **PDF report**) and **Action log** (who did what and when, and who it was sent to).
- **Add task** – Creates a task linked to the log. See Tasks.
- **Add to calendar** – Adds an event to your calendar (Google, Outlook, or a file).
- **Delete Work Log** – Deletes the log after confirmation. This can't be undone.

> **Don't see this option?** If **Delete Work Log** is gray, the message "You lack the permissions to delete work logs" appears. Users with view-only permission don't see edit, duplicate, send, and pin actions. Contact the project manager.

On your phone

- The list is available in the **Cards** and **Calendar** views only. The table view and actions on several logs are available on desktop.
- To open the filters, tap **Show filters**.
- A new log opens from the **+** button in the corner of the screen. If required fields are missing in another section of the form, the save button changes to **Next** and takes you to the missing section.
- In the Detail window, you can choose between **Side menu view** and **Cards view**. The actions are in the three-dot menu (**More options**).

- Table rows and process steps are shown as cards. Tap a card to edit.

More about working on a phone: Using a phone and tablet.

Frequently asked questions

Why can't I create a log for today? A log of the same type probably already exists for the same date. Click **Today** in the metrics bar, find the existing log, and keep working on it.

Why is the "Add row" button gray? In this table, every row is signed with your saved signature, and you don't have a signature in the system yet. See What to do when you have no signature.

How do I reopen a closed log? Work logs can't be reopened. Use **Revise and submit** – see Correct a closed work log.

I sent the log by email, but it's still open. Sending by email doesn't move the process forward. To move the log along, take an action on the active step.

How do I see who approved the log? Click a completed step in the steps section, or open **Work Log History → Action log**.

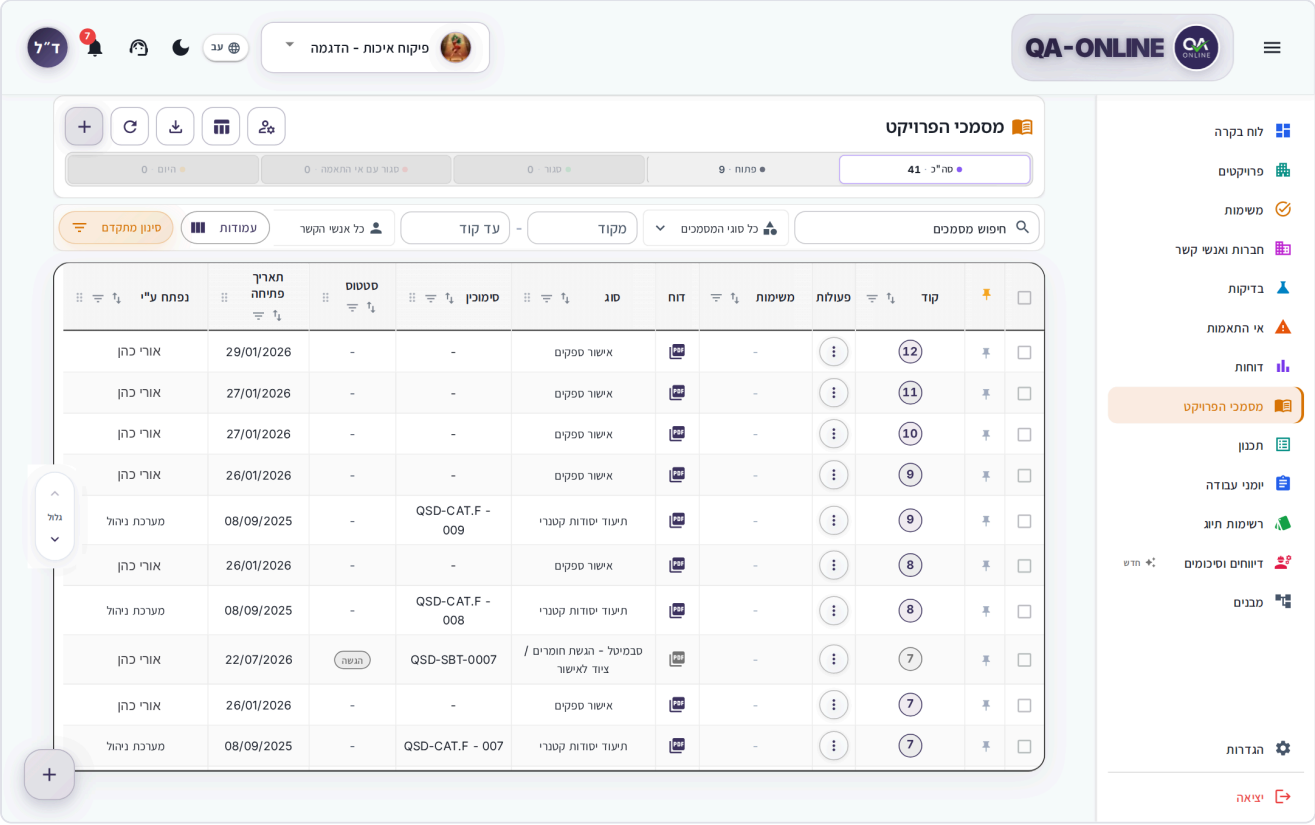
See also

- Tasks – Handle logs that are waiting for your approval.
- Project documents – Quality documents that work the same way.
- Field reports – Summaries of site tours and meetings, with follow-up tasks.
- Common tools – Location picker, files, export, links, and pinning.
- For organization system admins – Upload a signature for a user and set up permissions.

Project documents

Manage the project's quality documents – protocols, approvals, and inspection forms – with an approval process and PDF reports.

Quality managers, supervisors, and project managers open quality documents here, using the types defined in your organization. They fill them in, send them for approval, and produce reports from them. Project documents are built on the same platform as Work logs, so tables, signatures, and the approval process work exactly the same way. This chapter links to the full explanations there. Field reports are managed on a separate screen and don't appear here.



The Project documents screen in table view, with the metrics bar and filters

> **Don't see this option?** Not every user sees every module and action. Permissions depend on your role in the project. If a module or button is missing, contact your project manager or your organization's system administrator.

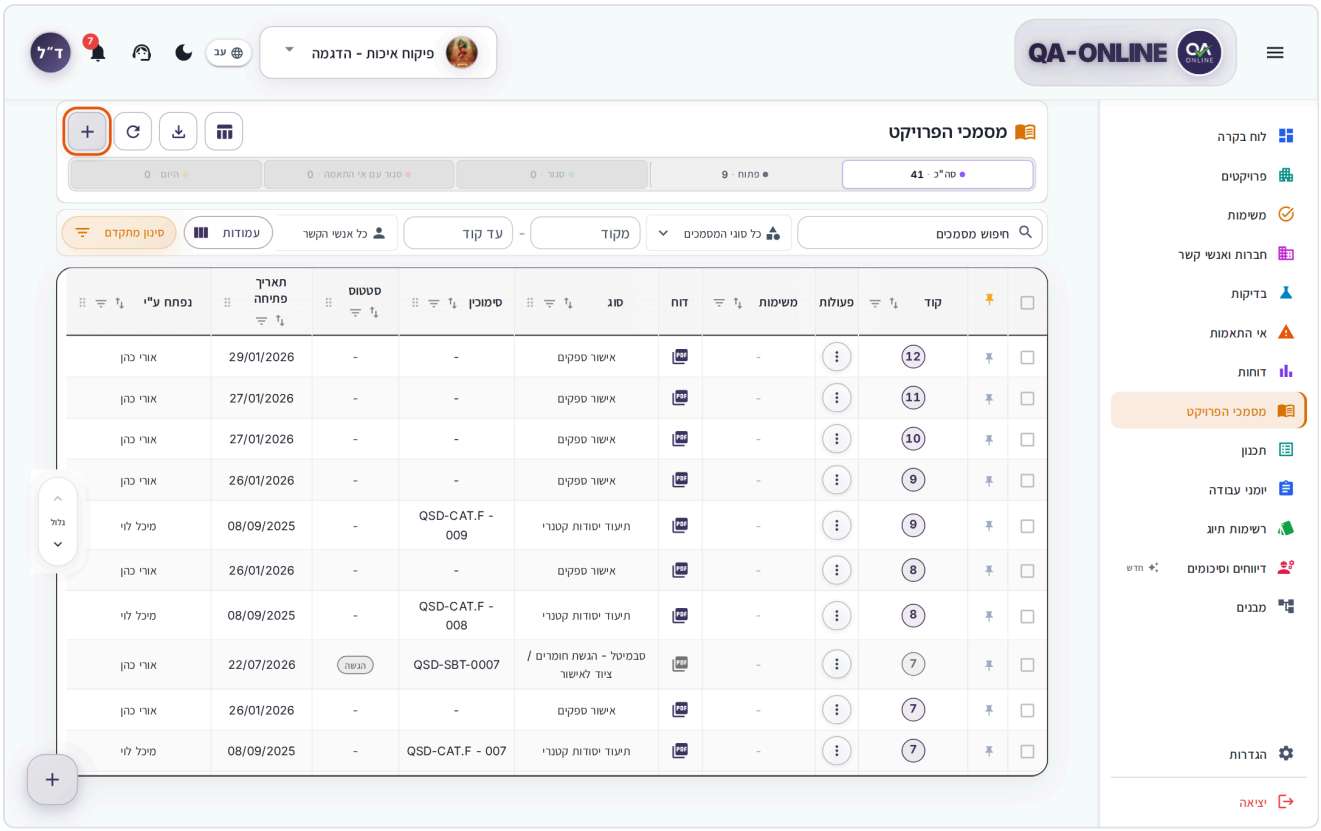
How to open Project documents

1. Choose a project in the **project selector** in the top bar.
2. In the side menu, click **Project Documents**.

If no project is selected, you'll see the message "Please select a project to view documents".

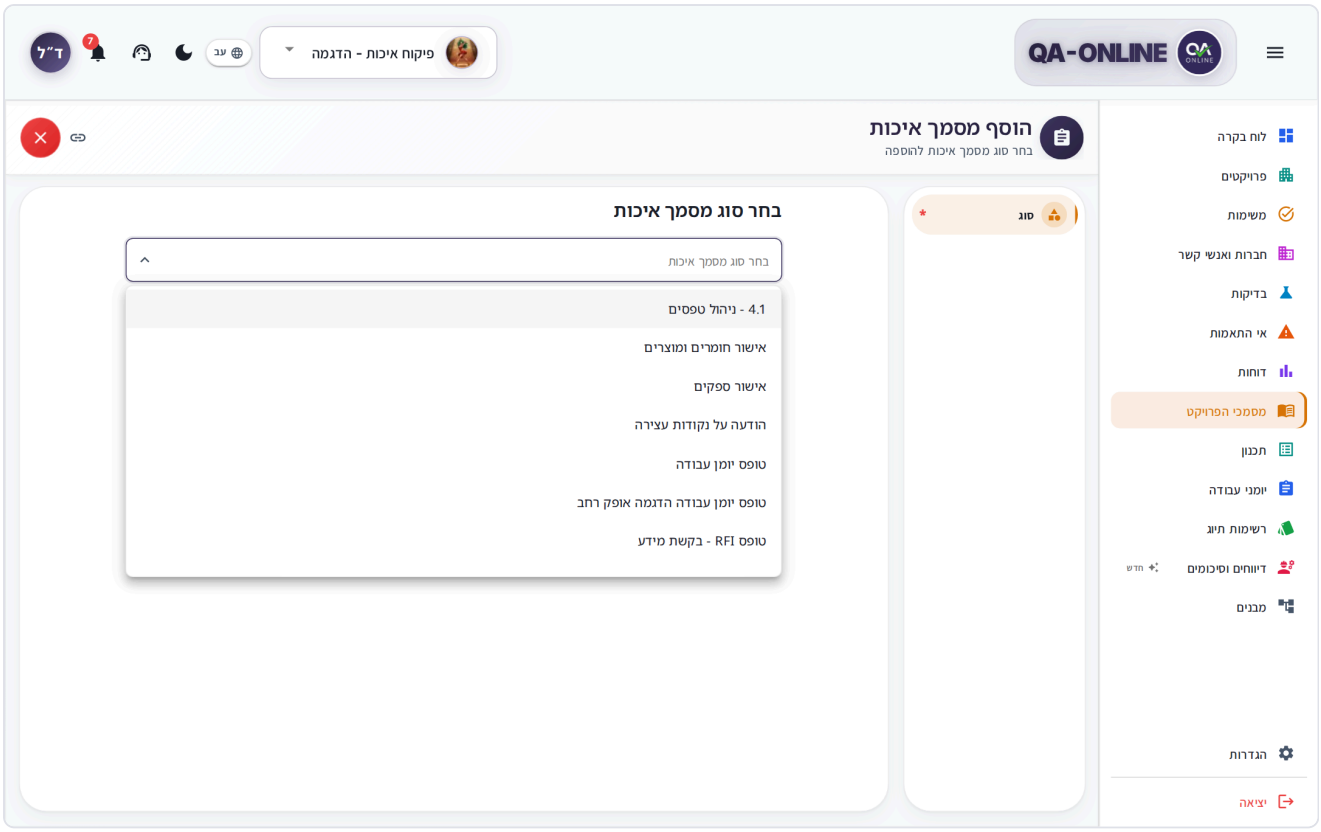
How to create a new document

1. In the side menu, click **Project Documents**, and make sure the right project is selected.
2. At the top of the screen, click **+** (**Create new quality doc**). You can also use the round **+** button in the corner of the screen.



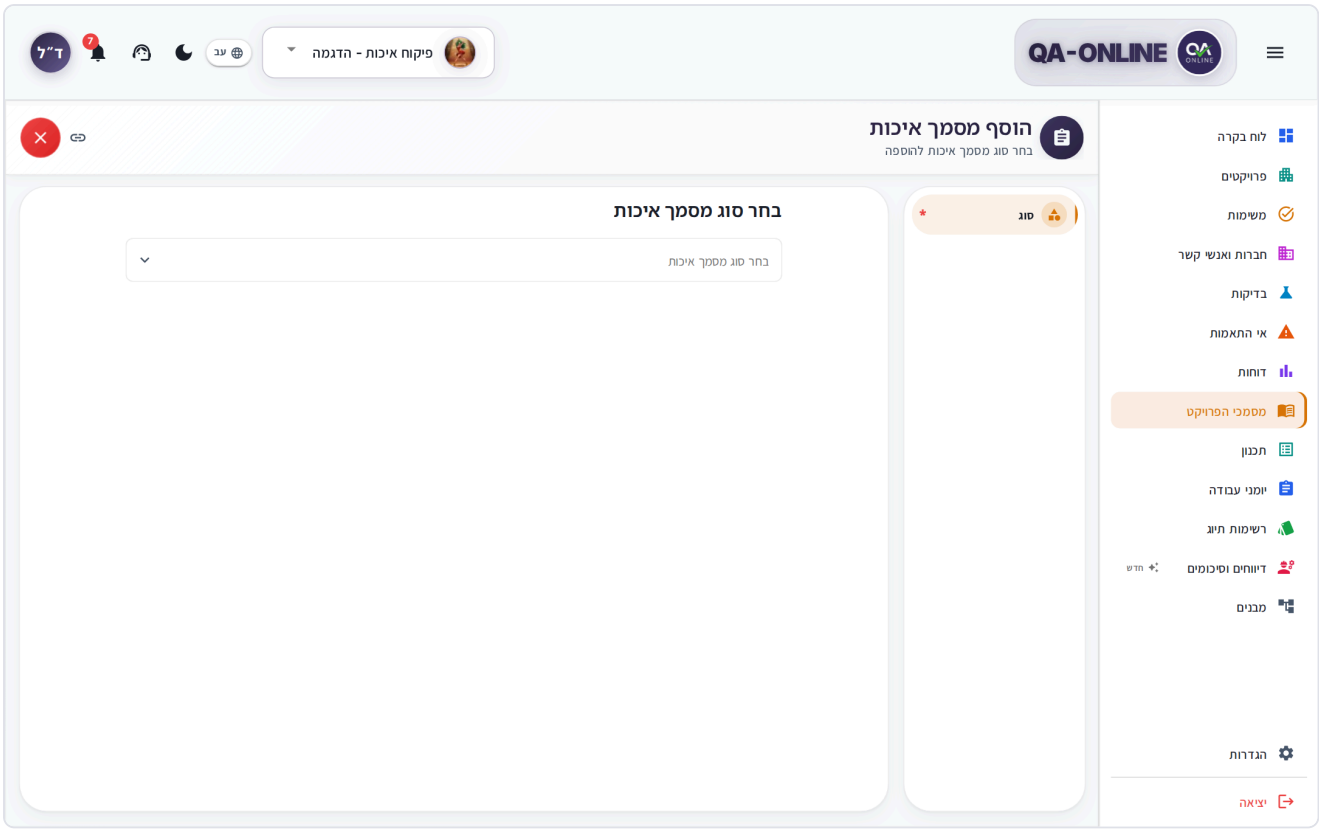
The Project documents screen, with the + button at the top of the screen highlighted

3. The **Add Quality Doc** window opens. Under **Type**, open **Select quality doc type** and choose a type, for example a request for information (RFI) or a materials approval.



The Add Quality Doc window with the type list open

4. Fill in the fields under **General details** and check the date. Required fields are marked with an asterisk.
5. If the template has a location field, choose a location. You can choose several locations: click **Add location** to add another path. For details, see Location picker.



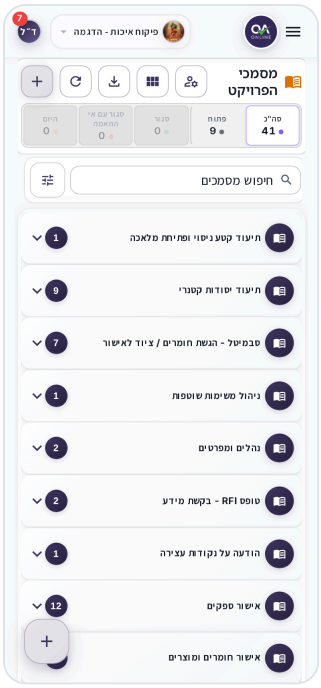
The Add Quality Doc window with general details and location selection

6. If the template has **Linked objects**, click **Add linked object**, choose a type (checklist or quality doc), and enter the codes.
7. If the template has tables, fill them in now or after you save. See How to fill in tables and rows.
8. Click **Save quality doc** at the bottom of the window.
9. In the **Quality doc created successfully!** message, click **Go to quality doc** to keep working on it.

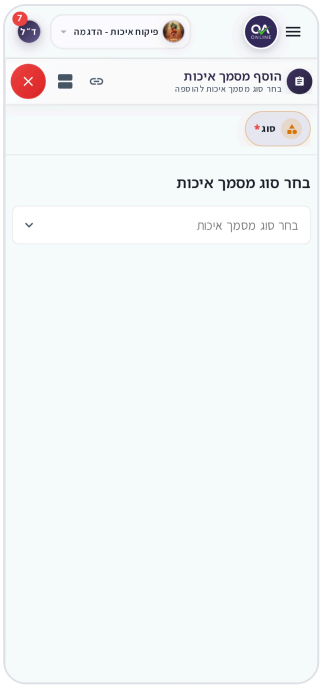
> **Note:** If the document type is limited to one document per day, the **Existing quality doc** window opens with the message "A quality doc of this type already exists on this date in the project.". Click **OK**, then change the date or open the existing document.

On your phone

1. In the list, tap **+** at the top of the screen or the floating button.
2. Tap **Select quality doc type** and choose a type. If required fields are missing in another section, the save button changes to **Next**.



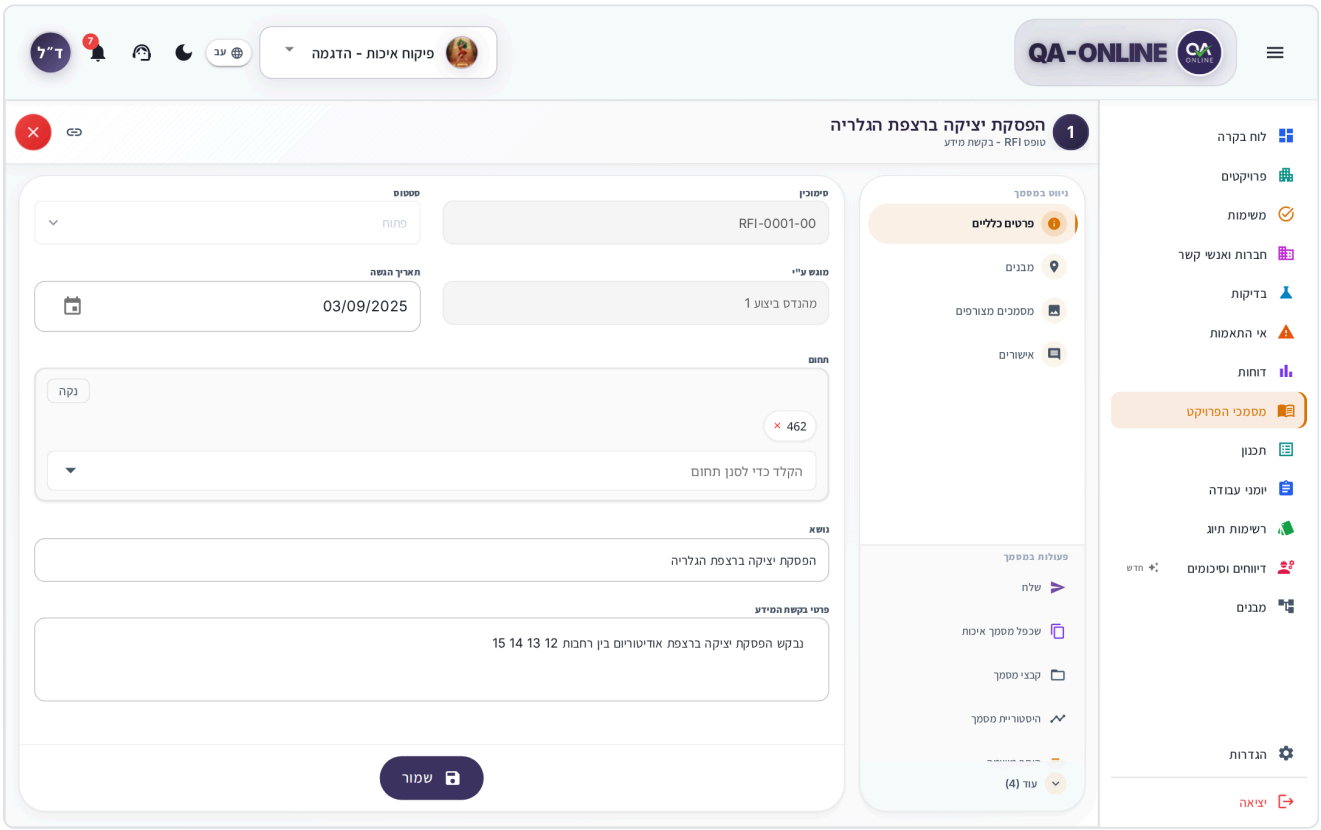
Project documents on a phone, in card view



The Add Quality Doc window on a phone, with type selection

How to edit a document

1. Click a row in the table or a card (or, in the card's **Options** menu, click **Edit Quality Doc**). The Detail window opens, with the document name and code in the title.



The quality doc Detail window, with the section menu and actions at the side

2. In the **Navigate in document** menu, choose a section: **General details**, special fields (such as location, contacts, or linked objects), tables, or the process steps.
3. Change the fields.
4. Click **Save** at the bottom of the window.

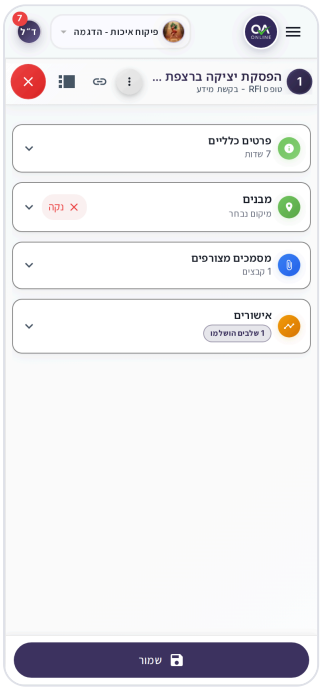
Next to the navigation menu, you'll see **Operations in document**. Actions that don't fit in the bar are under **More**. If the document is locked for editing, for example after its process has finished, the fields are read-only and there's no **Save** button.

> **Don't see this option?** If the menu shows **View Quality Doc** instead of **Edit Quality Doc**, you have view-only permission. Contact your project manager.

If you open a link to a document that was deleted or that you don't have access to, you'll see the message **Quality doc not found**.

On your phone

Tap the document card. The document opens full screen, with the sections listed one below the other. Tap a section, make your changes, and tap **Save** at the bottom. Other actions are in the three-dot menu (**More options**).

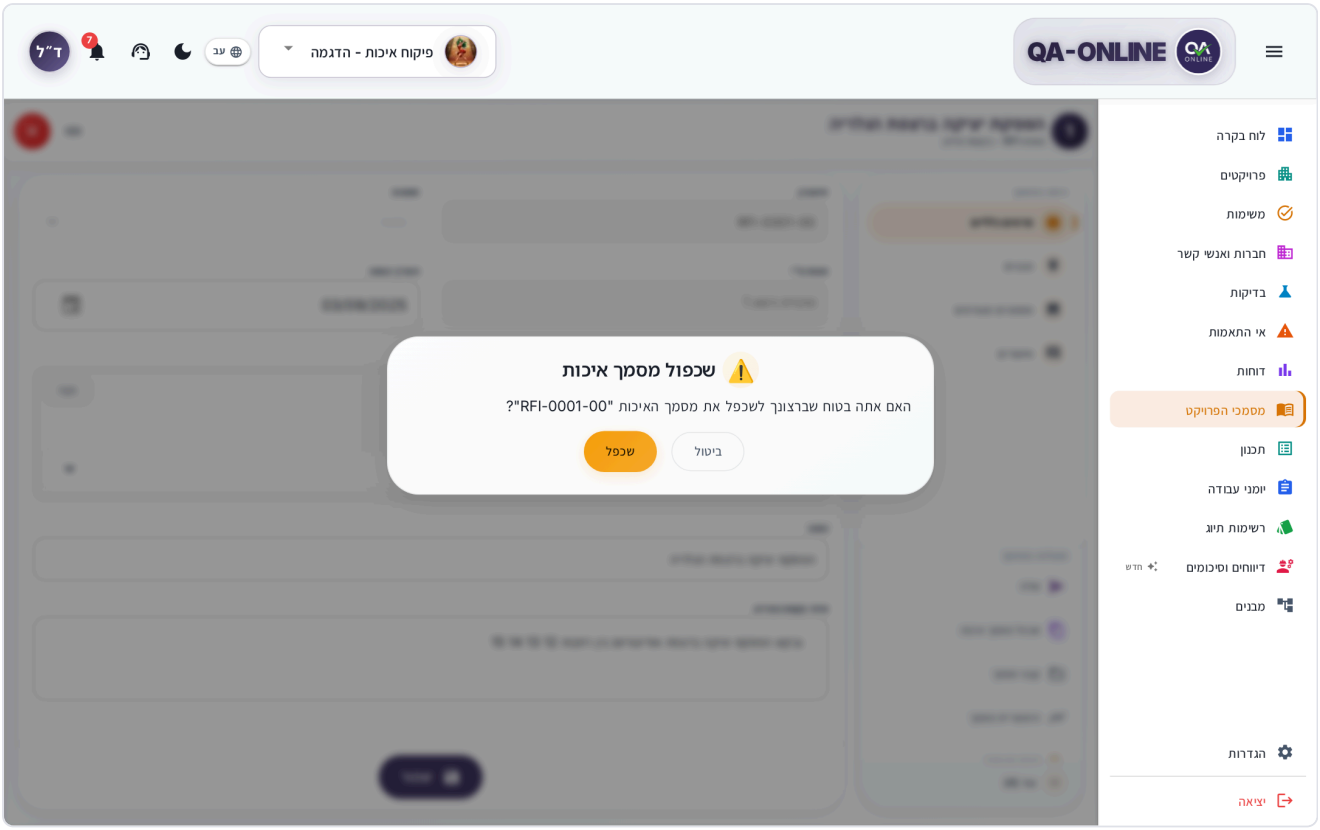


A quality doc open on a phone, with the list of sections

How to duplicate a document

1. Open the original document and, in the actions at the side of the window (or in the card menu), click **Duplicate Quality Doc**.

2. In the **Duplicate Quality Doc** window ("Are you sure you want to duplicate the document…"), click **Duplicate**.



The Duplicate Quality Doc confirmation window, with the Cancel and Duplicate buttons

3. In the **Duplicate Quality Doc** window, check the general details and **update the date**.
4. Click **Duplicate Quality Doc**. The new document is created with a new code.

> **Note:** When you duplicate a quality doc, only the general details are copied. Table rows and linked objects aren't copied – fill them in on the new document.

On your phone

In the open document, tap the three dots (**More options**) and choose **Duplicate Quality Doc**. The rest is the same as on a computer.

How to find a document

Views

Click the **View mode** button in the header and choose:

- **Table** – one row per document. Best for quick scanning and for acting on several documents at once. Available on computers only.
- **Cards** – one card per document, grouped by type.

- **Calendar** – a calendar view. Click a date to see its documents. If there are no documents on that date, you'll see the message "No documents for this date".

Metrics in the header

At the top of the screen you'll see the counters **Total**, **Open**, **Closed**, **Closed with non-conformance**, and **Today**. Click a counter to show only its documents. Click it again to remove the filter.

Search and filter

1. Type a word or code in the **Search documents** field.
2. Choose a type under **Document type** (the default is **All document types**).
3. If needed, narrow the results by **From Code** / **To Code**, **Contact**, and **Status**.
4. To filter by dates or by additional columns, click **Advanced Filters**, fill in the fields, and click **Save**.

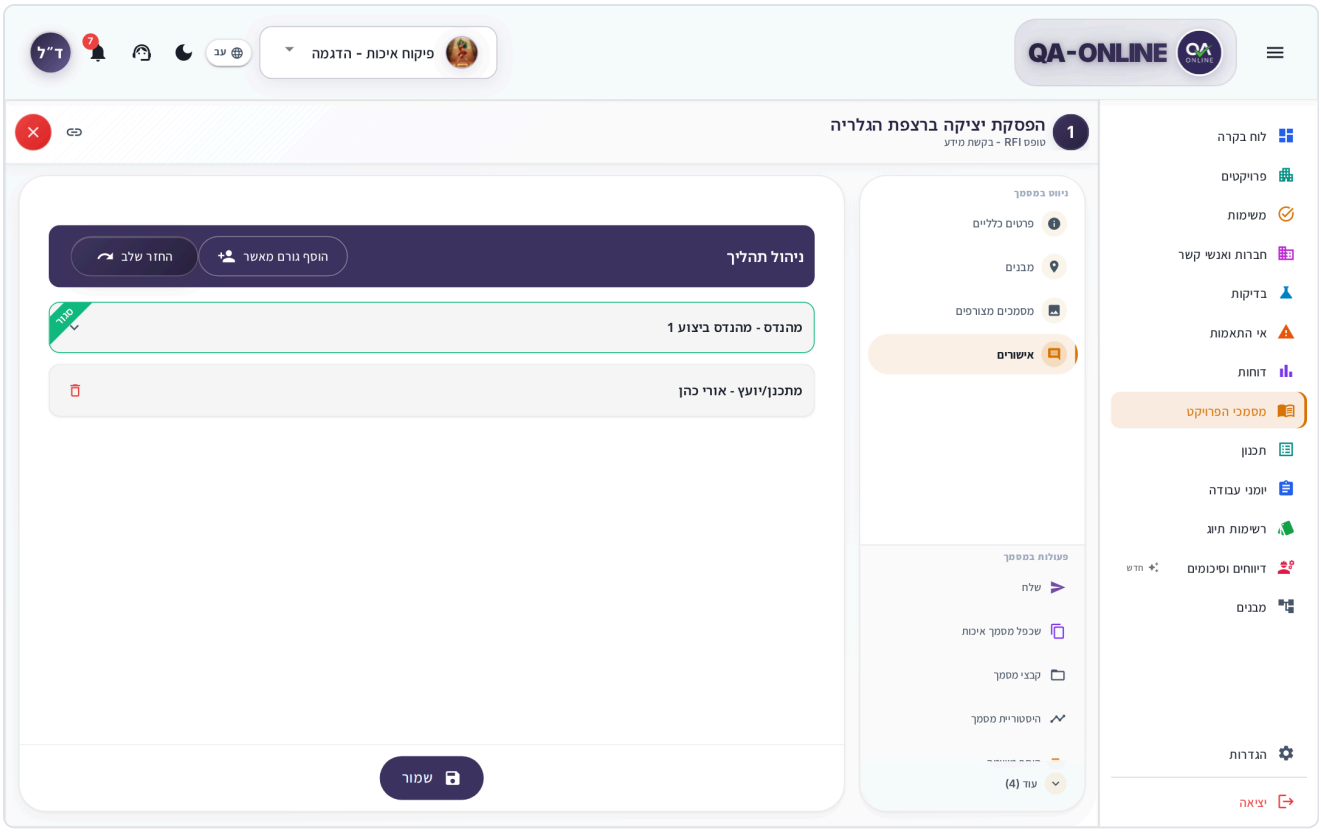
Below the filters you'll see the number of documents found, for example "12 of 40 documents". To clear all filters, click **Clear All**. Choosing table columns (**Columns**) works the same as in Work logs.

> **Tip:** If you came from the Structures screen, the list is filtered by that structure, and a "Filtered by structure: …" tag appears above it. Click the X on the tag (**Clear structure filter**) to remove the filter.

Tables, signatures, and the approval process

These parts work in Project documents exactly as they do in Work logs:

- **Tables and rows** – see How to fill in tables and rows. In an action items table, fill in all required fields in every row before you save. If a field is missing, you'll see the message "Please fill in all required fields: …".
- **A greyed-out "Add row" button** – approver tables and signed-comments tables require a saved signature. See Rows that require a signature and What to do if you don't have a signature. When you contact support, include the document code and the table name.
- **Approving, signing, and returning a step** – see How to approve, sign, and return a step. When it's your turn, the document appears in Tasks, in the **Incoming** box.
- **Statuses** – **Open**, **Closed**, and **Closed with non-conformance**, plus other names according to your organization's settings. See Statuses.



The steps section of a document, with the process management bar and an active step with action buttons

How to attach files and images

- **Within a field or row** – in file fields and in table file columns, click the upload area or drag files onto it.
- **Document files** – choose **Document files** in the Detail window actions or in the card menu, click **Add files**, choose files, and click **Upload**.

For details, see Attaching files and images.

How to send a document by email

1. In the Detail window, click **Send**, or choose **Send** in the card menu.
2. In the **Send Quality Doc** window, choose recipients from **Contacts** or **Distribution list**, or add a **New email**.
3. Write a **Message** and click **Send**.

Sending by email doesn't advance the approval process.

How to produce a PDF report

1. In the Detail window or the card menu, open **Reports**.
2. Choose **Full Report** (the document with all its data) or **Empty Report** (a blank template of the type).
3. The report opens in a preview, and you can download it from there.

For the report of an earlier version, open **Document History**, choose a version, and click **PDF report**. In the table, you can also click the PDF or Excel icon in the **Report** column.

How to export the list of documents

1. In the screen header, click the export icon (**Export quality docs**).
2. Choose a **Document type**, then **ZIP** or **Excel**.
3. The file is prepared in the background. When it's ready, a preview opens, and you can download the file from there.

If you selected rows in the table, the export includes only those rows. For details, see Previewing and downloading files.

> **Note:** If you see the message "Export is unavailable for this project", export isn't enabled for the project. Contact your project manager.

Link, pin, and acting on several documents

- **Copy link** (on a phone: **Share**) in the Detail window header copies a direct link to the document. See Copying a link and sharing.
- The pin icon on a card, or **Pin Quality Doc** in the menu, pins the document to the **Pinned quality docs** section at the top of the list. See Pinning and recent activity.
- In **Table** view, select several rows and choose **Pin**, **Unpin**, **Add task**, or **Delete** in the actions bar. Deleting several documents asks for confirmation ("Delete 3 project documents?") and can't be undone.

How to reopen or correct a closed document

A closed document has two options, in the Detail window (under **More**) or in the card menu:

- **Reopen Quality Doc** – returns the same document for handling. In the **Reopen Quality Doc** window, click **Reopen**.
- **Revise and submit** – immediately creates a new version of the document, with no confirmation window, and submits it to the process again. The previous version is kept in **Document History**.

Both actions appear only on a closed document.

> **Don't see this option?** If the action is greyed out, you'll see a message such as "You lack the permissions to reopen quality docs". Contact your project manager.

More actions

- **Document History** – two tabs: **Document Versions** (for each version: **Files**, **Send**, **PDF report**) and **Activity log** (who did what, and when).
- **Add task** – creates a task linked to the document. See Tasks.
- **Add to calendar** – adds an event to your calendar (Google, Outlook, or a file).
- **Delete Quality Doc** – deletes the document after you confirm in the **Delete Quality Doc** window. This can't be undone.

On your phone

- The list is available in **Cards** and **Calendar** views only. To open the filters, tap **Filters**.
- A new document opens from the **+** button in the corner of the screen. If required fields are missing in another section of the form, the save button changes to **Next**.
- In the Detail window, actions are in the three-dot menu (**More options**). Table rows and process steps are shown as cards.

For more on working on your phone, see Using your phone and tablet.

FAQ

Why don't I see field reports here? Field reports are managed on their own screen: Field reports.

Why is the "Add row" button greyed out? In this table, every row is signed with your saved signature, and you don't have a signature in the system yet. See What to do if you don't have a signature.

What's the difference between "Reopen" and "Revise and submit"? Reopen returns the same document for handling. **Revise and submit** creates a new version and submits it to the process again, and the previous version is kept in the history.

I duplicated a document and the tables are empty. That's expected: when you duplicate a quality doc, only the general details are copied.

See also

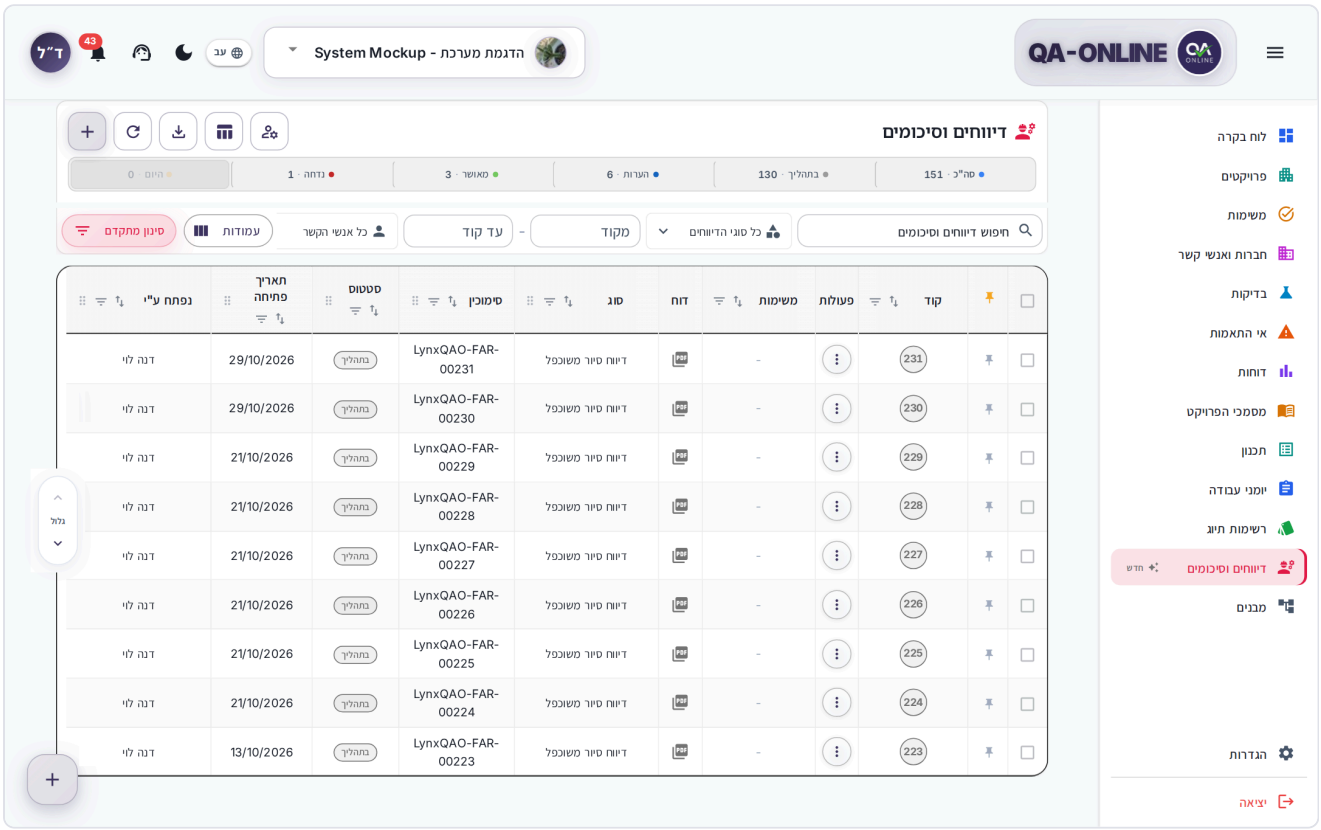
- Work logs – the full explanation of tables, signatures, and the approval process.
- Tasks – handle documents that are waiting for your approval.
- Structures – go from a structure to the documents related to it.
- Common tools – location picker, files, export, links, and pinning.

Field reports

Summarize a site visit or meeting, assign each task that came up to the person responsible, and follow up on how it's handled.

Supervisors, project managers, and quality managers open a field report after a site visit or meeting. Each field report has general details, a list of **Tasks** that are each assigned to contacts, **Treatments** (responses) that record what was done on each task, and **Summary notes**. Field reports, Work logs, and Project documents are built on the same platform, so working in them is almost identical.

In the side menu, the **New** badge appears next to **MOM**.



The Field reports screen in table view, with the metrics bar and filters

> **Don't see this option?** Not every user sees every module and action. Permissions depend on your role in the project. If a module or button is missing, contact your project manager or your organization's system administrator.

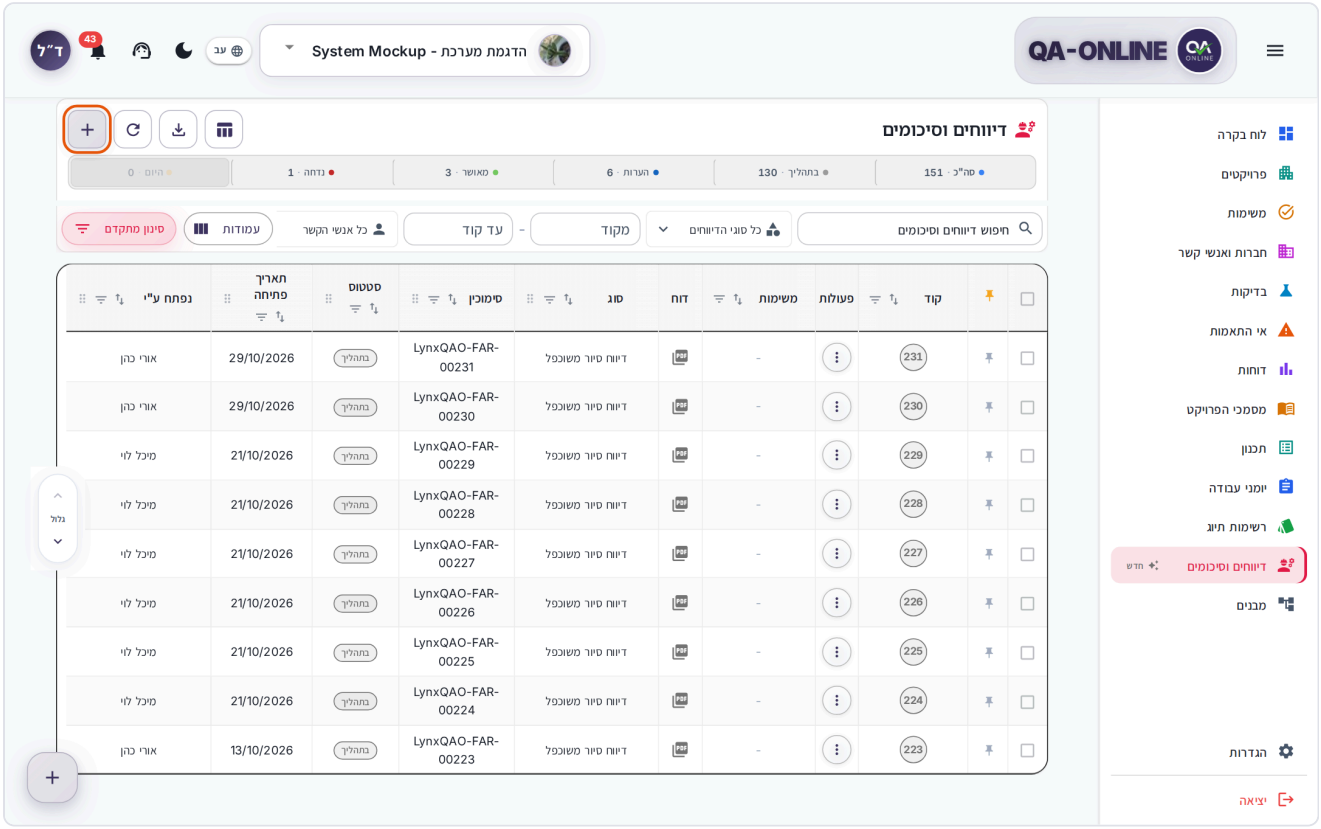
How to open Field reports

1. Choose a project in the **project selector** in the top bar.
2. In the side menu, click **MOM**.

If no project is selected, you'll see the message "Please select a project to view MOMs".

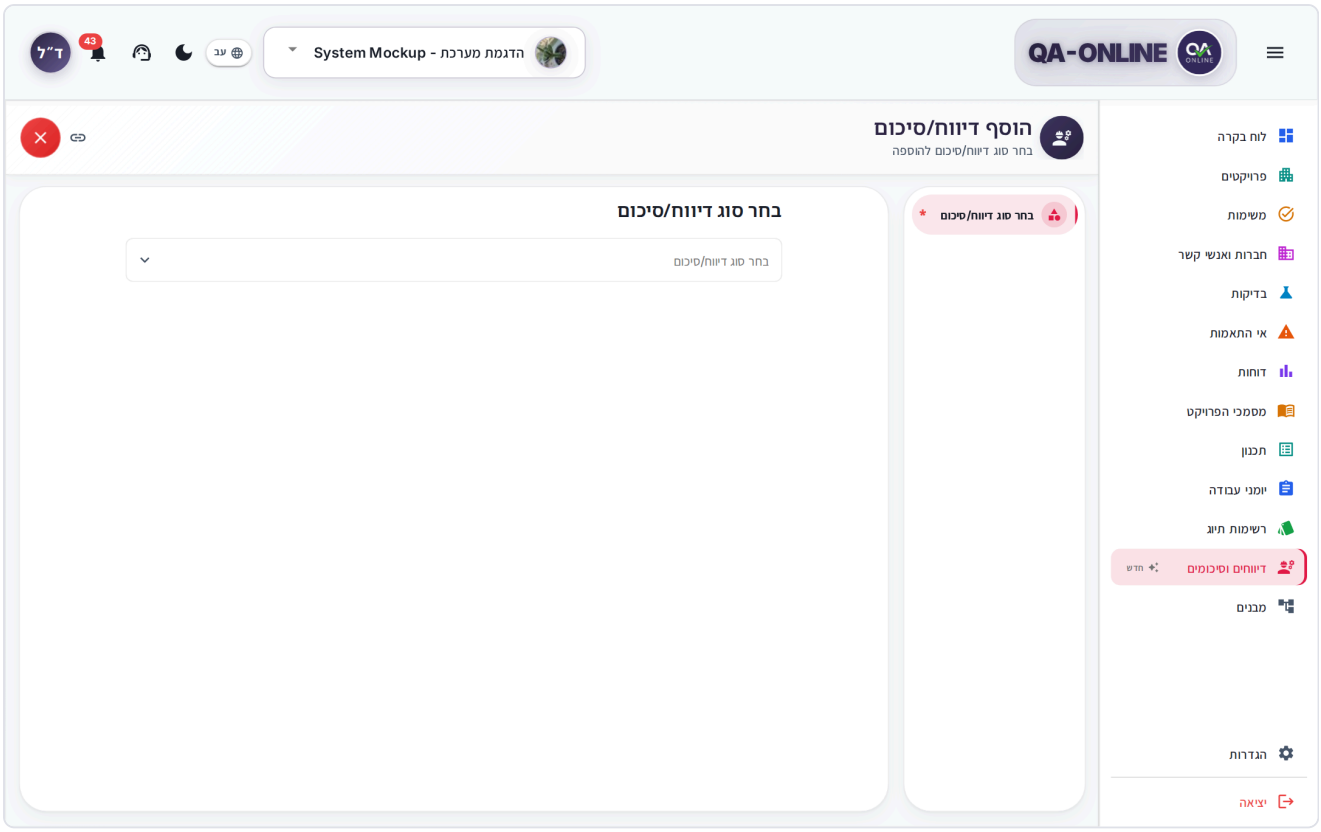
How to create a field report

1. In the side menu, click **MOM**, and make sure the right project is selected.
2. At the top of the screen, click **+** (**Create a new MOM**). You can also use the round **+** button in the corner of the screen.



The Field reports screen, with the + button at the top of the screen highlighted

3. In the **Add MOM** window, under **Type**, choose the type in **Select MOM Type** (for example, a site visit summary or meeting minutes).
4. Fill in the fields under **General details**: date, location, participants, and any other field in the template. Required fields are marked with an asterisk. For details, see Location picker.



The Add MOM window with the type menu, general details, and tasks

5. If the template has **Linked objects**, click **Add linked object**, choose a type (checklist or quality doc), and enter the codes.
6. In the **Tasks** section, add the tasks that came up during the visit or meeting. See How to add tasks.
7. Click **Save** at the bottom of the window. If the button is inactive, the text below it tells you what's missing, for example "Required: Date".
8. In the **MOM created successfully** message, click **Go to MOM**.

Note: If you close the window before saving, you'll see the question **Discard this MOM?** – "Your draft will be lost.". Click **Keep editing** to go back, or **Discard** to leave. Changing the type after you've started filling in the form also discards the draft (**Change MOM type?** → **Change type**).

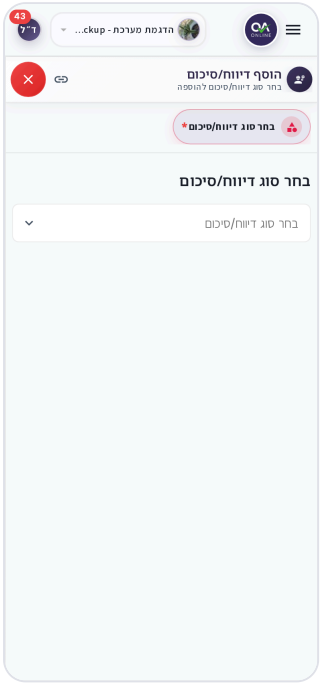
Note: If the field report is created but part of the save fails (for example, the tasks or the files), a message appears with **Retry**. Click it. If you close anyway, you'll see the question **Leave without finishing?** – and you can complete what's missing from the field report in the list.

Note: If the type is limited to one field report per day, the **Existing MOM** window opens. Click **OK**, then change the date or open the existing field report.

Tip: If the template has a weather field, it's filled in automatically based on the project's location and the date. If loading fails, click **Retry** or choose a value yourself.

On your phone

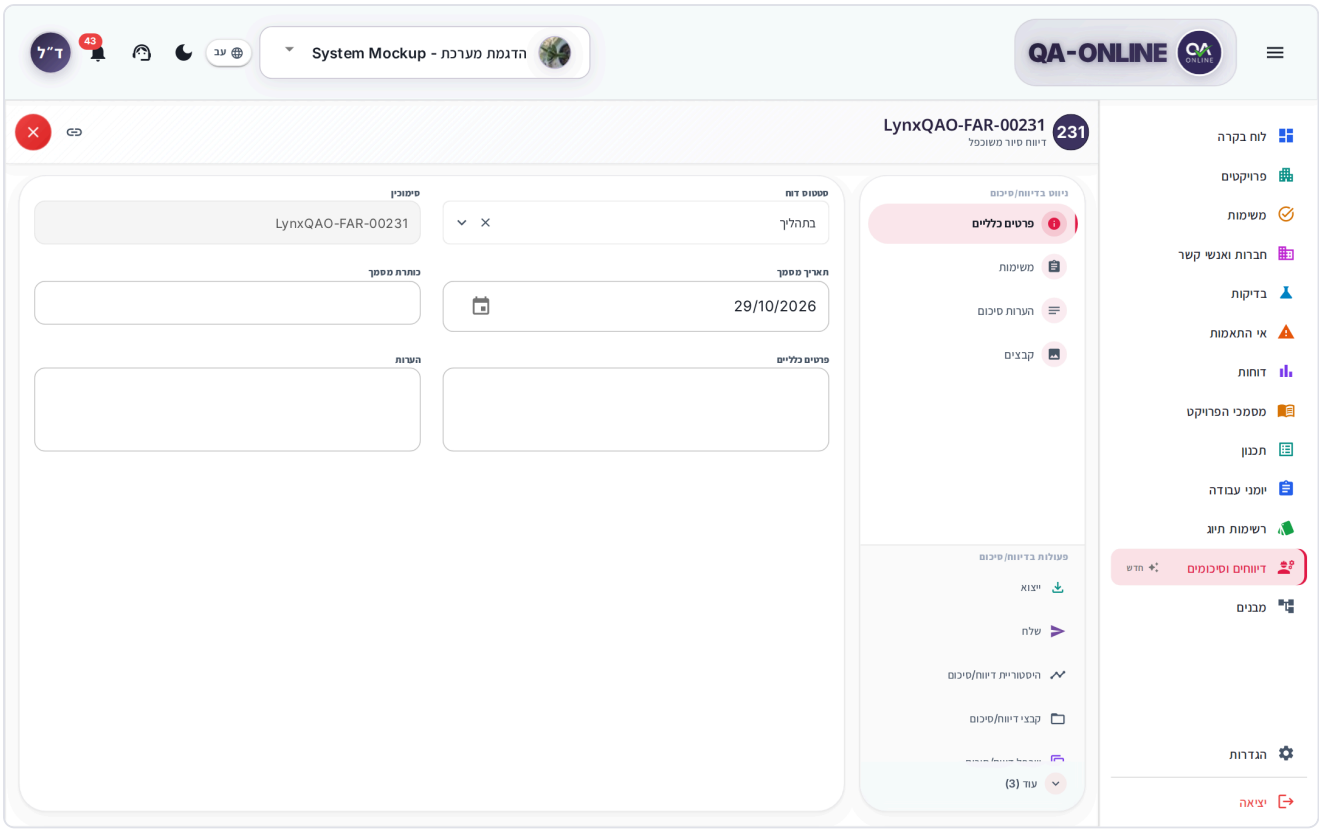
1. In the list, tap **+** at the top of the screen or the floating button.
2. Tap **Select MOM Type** and choose a type. If required fields are missing in another section, the save button changes to **Next**.



The Add MOM window on a phone, with type selection

How to edit a field report

1. Click a row in the table or a card (or, in the card's **Options** menu, click **Edit MOM**). The Detail window opens, with the code in the title.



The field report Detail window, with the section menu and actions at the side

2. In the **Navigate in MOM** menu, choose a section: **General details**, special fields (such as linked objects), **Tasks**, **Summary notes**, files, additional tables, or the steps. A section with empty required fields is marked with an asterisk.
3. Change the fields.

You don't need to click Save. Every change to the details, tasks, and treatments is saved automatically as you work, and also when you close the window. While it's saving, you'll see **Saving**.

Next to the navigation menu, you'll see **Operations in MOM**: **Export**, **Send**, history, files, duplicate, and reports. Actions that don't fit in the bar are under **More**.

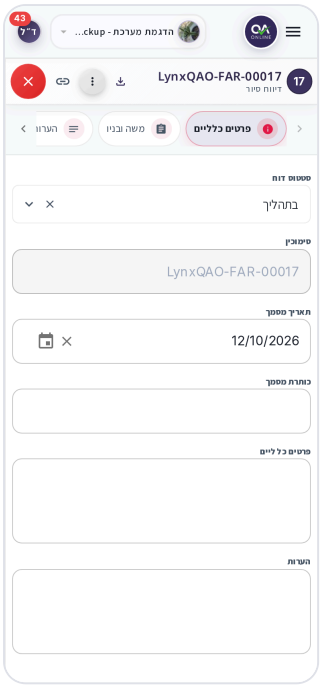
> **Note:** If saving fails, a message appears such as "Could not save. Close again to retry, or keep editing." The window stays open so you don't lose data. Check your connection and try again.

> **Don't see this option?** If the menu shows **View MOM** instead of **Edit MOM**, you have view-only permission. Contact your project manager.

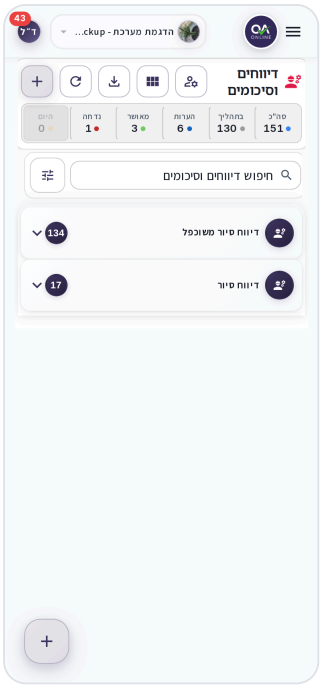
If you open a link to a field report that was deleted or that you don't have access to, you'll see the message **MOM not found**.

On your phone

Tap the type group, then tap the card. The field report opens full screen, and the sections appear as tabs at the top of the screen (**General details**, **Tasks**, and more). Changes are saved automatically.



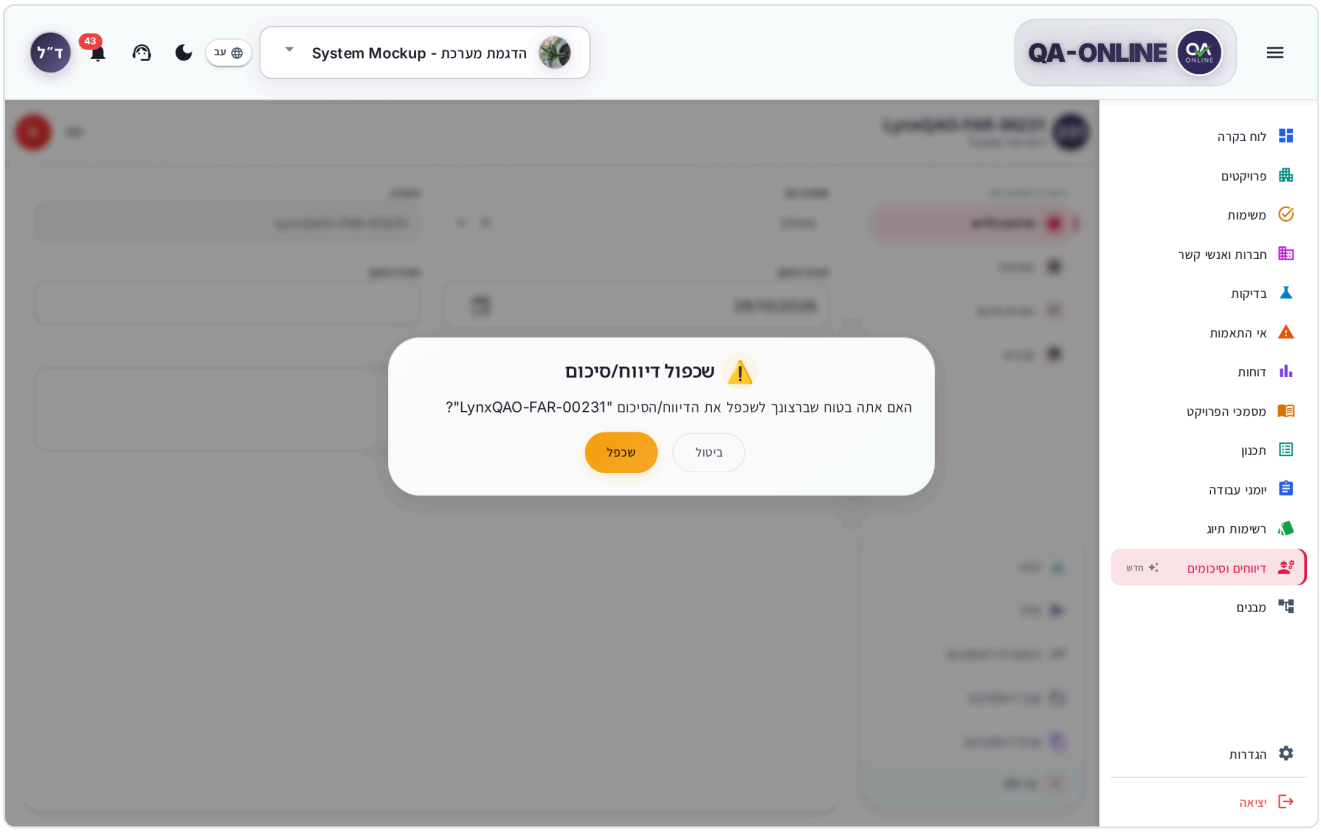
A field report open on a phone, in the General details section



A field report on a phone, with the Tasks section shown as cards

How to duplicate a field report

1. Open the original field report and, in the actions at the side of the window (or in the card menu), click **Duplicate MOM**.
2. In the **Duplicate MOM** window, click **Duplicate**.



The Duplicate MOM confirmation window, with the Cancel and Duplicate buttons

3. In the window that opens, check the general details and **update the date**.
4. Click **Duplicate**. You'll see the message "MOM duplicated successfully".

> **Note:** When you duplicate, only the general details are copied. Tasks, treatments, and linked objects aren't copied.

On your phone

In the open field report, tap the three dots (**More options**) and choose **Duplicate MOM**. The rest is the same as on a computer.

How to find a field report

Views

Click the **View mode** button in the header and choose:

- **Table** – one row per field report. Best for quick scanning and for acting on several at once. Available on computers only.
- **Cards** – one card per field report, grouped by type.
- **Calendar** – a calendar view. Click a date to see its field reports. If there are none, you'll see the message "No MOMs for this date", and you can click **Add MOM**.

Metrics in the header

At the top of the screen you'll see counters: **Total**, **Today**, and a counter for each status that exists in the project (for example **Open**, **Closed**, **Rejected**, or **Remarks**). Click a counter to show only its field reports. Click it again to remove the filter.

Search and filter

1. Type a word or code in the **Search MOMs** field.
2. Choose a type under **MOM type** (the default is **All MOM types**). Next to each type, you'll see the number of field reports it has.
3. To narrow results to a range of codes, fill in **From Code** and **To Code**. The filter updates when you leave the field or press Enter.
4. Choose who opened the field report under **Contact** (the default is **All contacts**).
5. Choose a **Status** (the default is **All statuses**).
6. To filter by dates, by location, or by additional columns, click **Advanced Filters**. Fill in **From date** / **To date** or choose values, and click **Save**.

Below the filters you'll see how many field reports were found, for example "12 of 40 MOMs". To clear all filters, click **Clear All**. If the filters leave you with no results, click **Clear filters**.

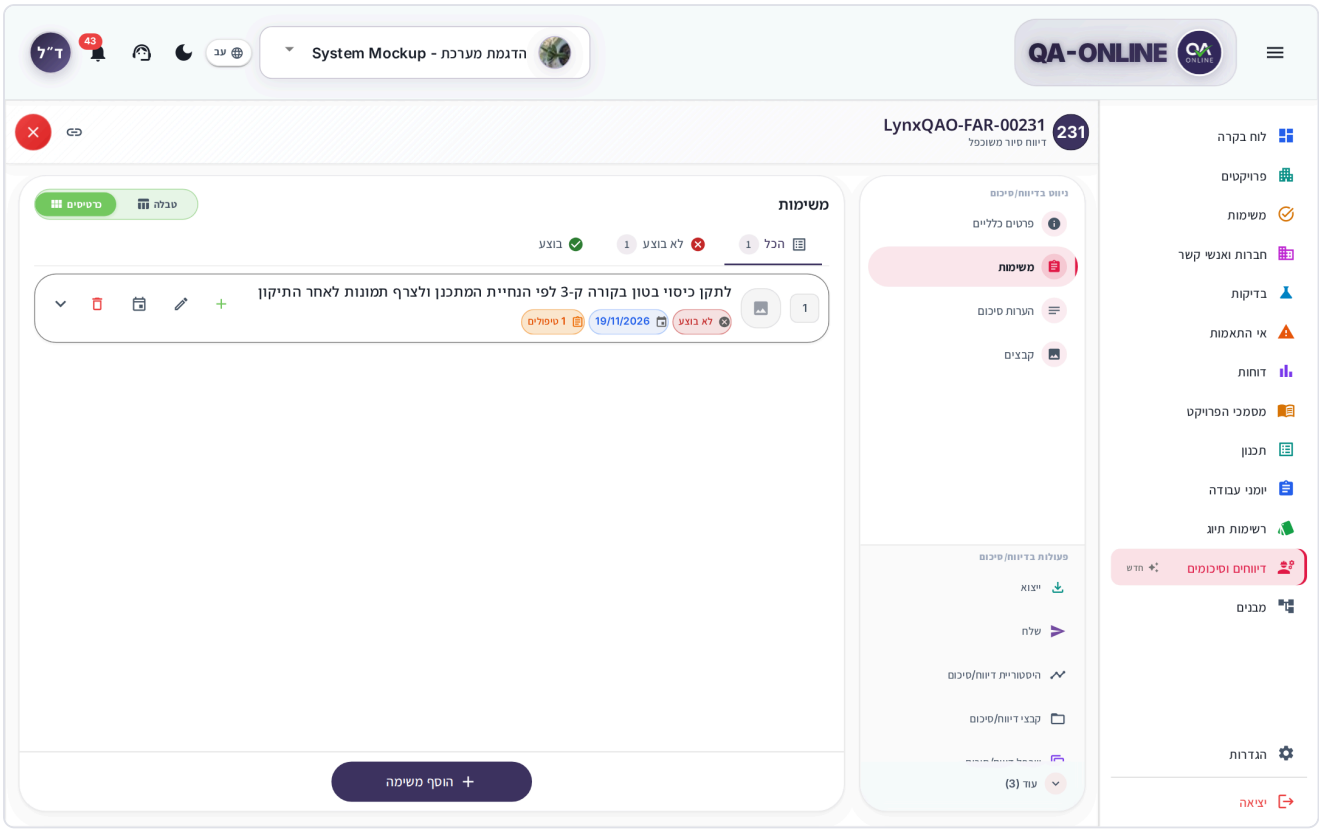
Choosing table columns (**Columns**) works the same as in Work logs.

> **Tip:** In the **Report** column, a PDF icon opens the field report's full report directly from the table.

How to add tasks

Each task records a finding or an action that needs to be done, and is assigned to the contacts who are responsible for it.

1. In the Detail window, choose **Tasks** in the side menu.
2. Click **Add task** (when there are no tasks yet: **Add first task**, or click the empty area).
3. In the **Task** window, fill in the task details, according to the fields in the template (for example name, description, location, and **Target** date).
4. Under **For treatment**, choose the responsible contacts.
5. You can attach images and files to the task.
6. Click **Save**.



The Tasks section with the All / Not done / Done tabs and task cards

Important: Every contact you add under **For treatment** gets a task in Tasks and a notification. Someone who was already assigned doesn't get notified again when you save the task again. If someone is removed from the task, their task is moved to the archive.

Tip: You can also add a task from the list without opening the field report: in the card menu, choose **Add MOM task**.

How to work with the task list

- Filter with the **All**, **Not done**, and **Done** tabs. Next to each tab, you'll see the number of tasks.
- On computers and tablets, switch between **Cards** and **Table**.
- Click a task to edit it. The edit window is divided into **Task**, **Status & schedule**, **People**, **Files**, and **More**.
- For more actions, click **Actions** (the three dots) or right-click the task: **Task** (edit), **Response**, **Show treatments** / **Hide treatments**, **Add to calendar**, and **Remove task**.
- **Add to calendar** appears only on a task that has a target date. It adds an event to your calendar (Google, Outlook, or a file).
- **Remove task** asks for confirmation (**Remove task**).

If saving a task fails, you'll see the message "Could not save the task. Tap Retry to try again." – click **Retry**.

How to record a treatment (response) on a task

A treatment (response) records what was done on a task and who it's passed to now. A task can have several treatments, in order.

1. On the task, click **Response** (or choose **Response** in the **Actions** menu).
2. Write a **Description** – for example, "I completed task A".
3. Choose an **Action date** (required).
4. If the task is passing to someone else, choose them under **Pass for treatment**. This field is optional – you can leave it empty if you're only recording what was done.
5. Attach files or images if needed.
6. Click **Save**.

To see a task's treatments, click **Show treatments** or expand the row in the table. To edit or delete a treatment, right-click it or use its menu (**Delete treatment**).

> **Important:** Whoever you choose under **Pass for treatment** gets a task in Tasks. Clicking it opens the field report directly at the task and the treatment.

> **Note:** Before you close the field report, close or save the treatment editor. Otherwise you'll see the message "Close or save the treatment editor before leaving."

How to write summary notes

1. Choose **Summary notes** in the side menu (right after **Tasks**).
2. Write the general notes from the visit or meeting.

The notes are saved automatically and appear in the report.

How to attach files and images

There are two ways to attach files:

- **Within a field, task, or treatment** – click the upload area or drag files onto it. You can add a title to each file and edit an image before saving.
- **MOM files** – choose **MOM files** in the Detail window actions or in the card menu. The window shows all the files, and you can filter between **All**, **Tasks**, **Responses**, and **Document files**.

For details, see Attaching files and images.

Tables, signatures, and the approval process

These parts work in Field reports exactly as they do in Work logs:

- **Tables and rows** (for example participants or signatures) – see How to fill in tables and rows.

- **A greyed-out "Add row" button** – approver tables and signed-comments tables require a saved signature. See Rows that require a signature and What to do if you don't have a signature. When you contact support, include the field report code and the table name.
- **Approving, signing, and returning a step** – some types have an approval process. See How to approve, sign, and return a step. For the close action, the window is called **Closing the MOM**.

Statuses

A field report's own statuses are set by its type in your organization's settings. The common ones are **Open**, **Closed**, and **Rejected** (the process ended with a non-conformance; in Project documents this is called **Closed with non-conformance**). You might also see other statuses, such as **Remarks**. See also Statuses.

Tasks inside the field report have a separate status: **Not done** or **Done**.

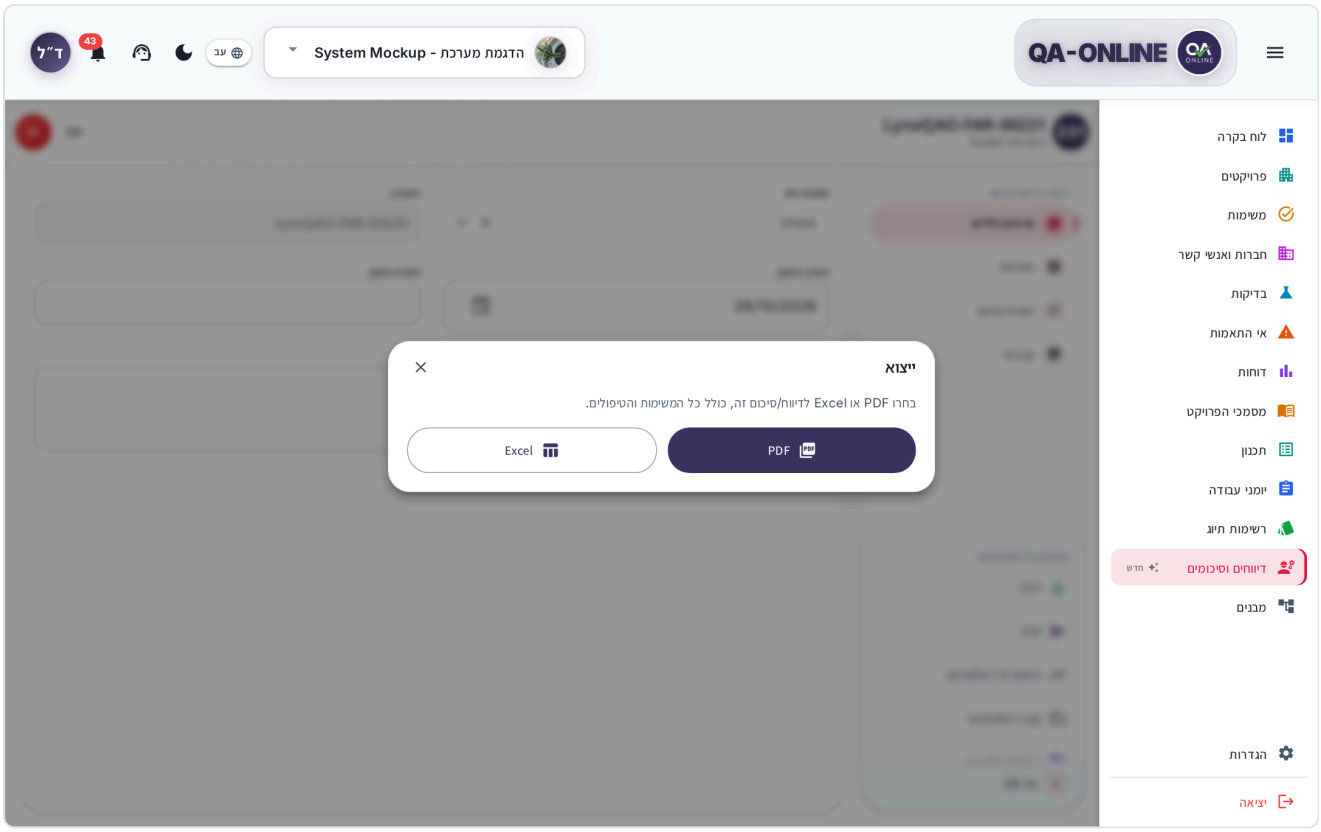
How to send a field report by email

1. In the Detail window, click **Send** (on a computer: in the actions bar, after **Export**; on a phone: in the three-dot menu). You can also choose **Send** in the card menu in the list – the field report opens and the send window appears.
2. In the **Send MOM** window, choose recipients from **Contacts** or **Distribution list**. To add an address that isn't on the list, use **New email**.
3. Write a **Message**.
4. Click **Send**.

Before sending, the system saves all your changes. Sending by email doesn't advance the approval process. To move the field report to the next step, use the actions in the steps section.

How to export a field report to PDF or Excel

1. In the Detail window, click **Export**.
2. In the **Export** window, choose:
   - **PDF** – the field report as a formatted document. While it's being prepared, you'll see "Generating PDF…".
   - **Excel** – a file with three sheets: **Details**, **Tasks**, and **Treatments**.
3. The file opens in a preview, and you can download it from there.



The Export window with the PDF and Excel buttons

Full report and empty report

In addition to export, under **Reports** (in the **More** menu or the card menu) you'll find:

- **Full Report** – the field report's official report, based on your organization's template.
- **Empty Report** – a blank template of the same type, to fill in by hand.

The difference: **Export** prepares the file directly in the browser and always includes all the tasks and treatments. **Full Report** is produced from the report template your organization defined for this type, as in the other modules. The report opens in a preview, and you can download it from there. For the report of an earlier version, open **MOM History**, choose a version, and click **PDF report**.

How to export the list of field reports

1. In the screen header, click the export icon (**Export MOMs**).
2. In the **Export MOM** window, choose a **MOM Type**.
3. Choose **ZIP** or **Excel**.
4. The file is prepared in the background, and you can keep working. When it's ready, a preview opens, and you can download the file from there.

If you selected rows in the table, the export includes only those rows ("Export 5 selected rows. ZIP and Excel include only those items.").

> **Note:** If you see the message "Export is unavailable for this project", export isn't enabled for the project. Contact your project manager.

For details, see Previewing and downloading files.

How to share a link to a field report

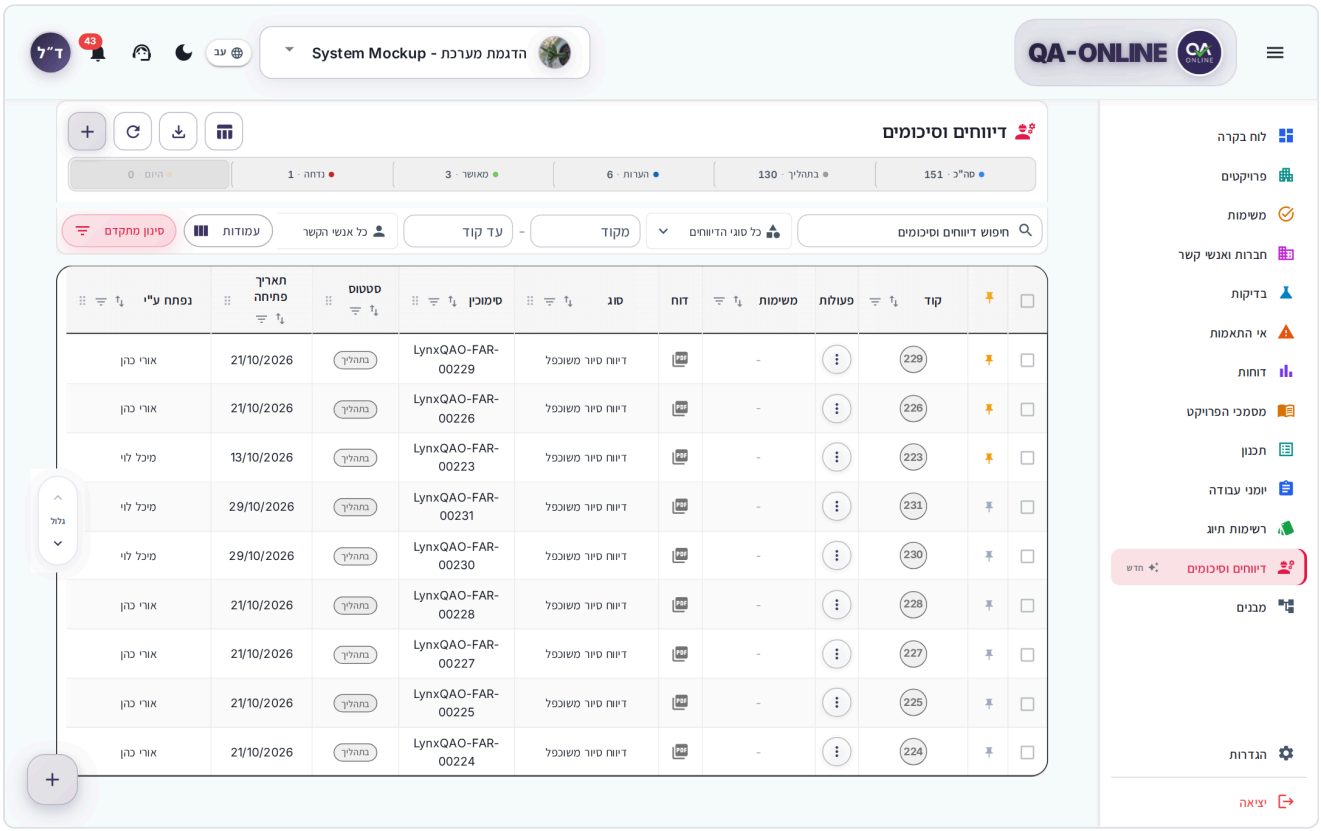
In the Detail window header, click **Copy link** (on a phone: **Share**). The link opens the field report directly and switches to the right project. For details, see Copying a link and sharing.

How to pin a field report

A pinned field report appears at the top of the list, in the **Pinned MOMs** section. Pinning is personal to you and is saved separately for each project.

1. On a card, click the pin icon (**Add to pinned**), or choose **Pin MOM** in the menu.
2. To remove it, click the pin again (**Remove from pinned**) or choose **Unpin**.

The pinned section shows how many items are pinned (for example "3 pinned"), sorted by type. Click the title to open or close it. For more on pinning, see Pinning and recent activity.



The Pinned MOMs section at the top of the list

How to act on several field reports at once

1. Switch to **Table** view.

2. Select the checkbox on the rows you want, or select **Select all**.
3. In the actions bar that appears, choose **Pin**, **Unpin**, **Add task**, or **Delete**.
4. To see only the rows you selected, click **Show selected**. To clear the selection, click **Deselect all**.

> **Note:** Deleting several field reports asks for confirmation ("Delete 3 MOMs?") and can't be undone.

How to reopen or correct a closed field report

A closed field report has two options, in the Detail window (under **More**) or in the card menu:

- **Reopen MOM** – returns the same field report for handling. In the **Reopen MOM** window, click **Reopen**.
- **Revise and submit** – immediately creates a new version, with no confirmation window, and submits it to the process again. The previous version is kept in **MOM History**.

Both actions appear only on a closed field report. If the field report is locked for editing, the fields are read-only.

> **Don't see this option?** Reopening, revising and submitting, and deleting require permission. If the action is greyed out, you'll see a message that you don't have permission. Contact your project manager.

More actions

- **MOM History** – two tabs: **MOM Versions** (for each version: **Files**, **Send**, **PDF report**) and **Activity log** (who did what and when, and who it was sent to).
- **Add task** (in the card menu) – creates a general task in Tasks that's linked to the field report. To add a task inside the field report, choose **Add MOM task**.
- **Delete MOM** – deletes after confirmation. This can't be undone. Without permission, you'll see the message "You lack the permissions to delete MOMs".

On your phone

- The list is available in **Cards** and **Calendar** views only. Table view and actions on several items are available on computers.
- To open the filters, tap **Filters**.
- A new field report opens from the **+** button in the corner of the screen. If required fields are missing in another section of the form, the save button changes to **Next** and takes you to the missing section.
- In the Detail window, you can choose between **Side menu view** and **Cards**. Actions, including **Send**, are in the three-dot menu (**More options**).
- Tasks are shown as cards only. Editing a task or a treatment opens full screen.
- Table rows and process steps are shown as cards. Tap a card to edit.

For more on working on your phone, see Using your phone and tablet.

FAQ

Where's the Save button on an existing field report? You don't need it. Every change is saved automatically, and also when you close the window. If saving fails, a message appears and the window stays open.

What's the difference between "Add task" and "Add MOM task"? Add MOM task adds a task inside the field report, and it appears in the report. **Add task** creates a general task in Tasks that's linked to the field report but isn't part of it.

I added someone responsible to a task. How do they know? They get a task in Tasks and a notification. Clicking it opens the field report directly at the task.

Why doesn't "Add to calendar" appear on a task? The option appears only on a task that has a target date. Add a **Target** date to the task and try again.

What's the difference between "Export" and "Full Report"? Export creates a PDF or Excel file of the field report, including all the tasks and treatments. **Full Report** is the report based on your organization's template.

Do I have to choose someone under "Pass for treatment"? No. The only required field in a treatment is **Action date**.

I duplicated a field report and it has no tasks. That's expected: when you duplicate, only the general details are copied.

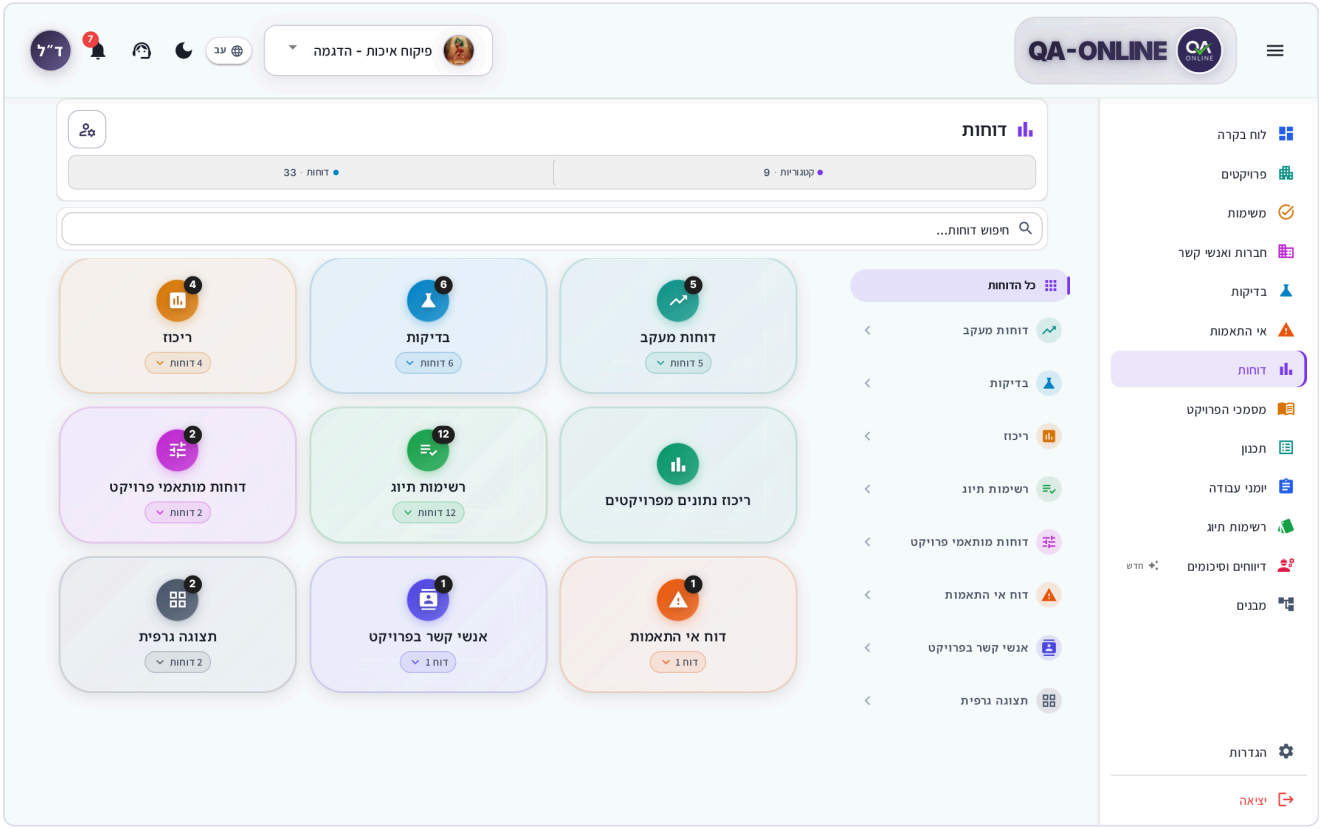
See also

- Work logs – the full explanation of tables, signatures, and the approval process.
- Tasks – where the people responsible see the tasks assigned to them.
- Project documents – quality documents that aren't field reports.
- Common tools – location picker, files, export, links, and pinning.

Reports

Produce consolidated project reports – tests, checklists, non-conformances, documents, suppliers, and more – and export them to Excel.

The **Reports** screen brings all the project's reports together in one place. Project managers, quality managers, and supervisors use it to get a snapshot of the project, prepare a periodic report for the client, track open items, or export data to Excel. Reports are divided into categories, and each report opens in its own window with filters, a results table, and export buttons.



The Reports screen with the category cards

How to open Reports

1. Make sure the right project is selected in the project selector. All reports are produced for the active project.
2. In the side menu, click **Reports**.

> **Tip:** In the side menu, you can expand **Reports** to see the categories: click the arrow icon next to the item (**Show report categories**). Clicking a category opens it directly.

What you see on the screen

- **Title and counters** – at the top of the screen, you'll see the number of **Categories** and the number of **Reports** available to you.
- **Search reports…** – search by report name. It filters both the cards and the navigation list. If nothing matches, you'll see **No reports match your search.**
- **Category cards** – a card for each category, with the number of reports in it (for example "5 reports"). Clicking a card opens the list of reports in the category.
- **Navigation list** (on a computer) – at the side of the screen, you'll see **All reports**, the categories, and the reports in them. Clicking a report name opens it right away.

When you enter a category, the title changes to the category name, for example **Reports - Tests**. To go back to all the categories, click the **All** counter or **All reports** in the navigation list.

> **Tip:** A category with only one report opens directly in the report window, with no screen in between. That's always the case for the **Non-conformance report** and **Project contacts**.

Report categories

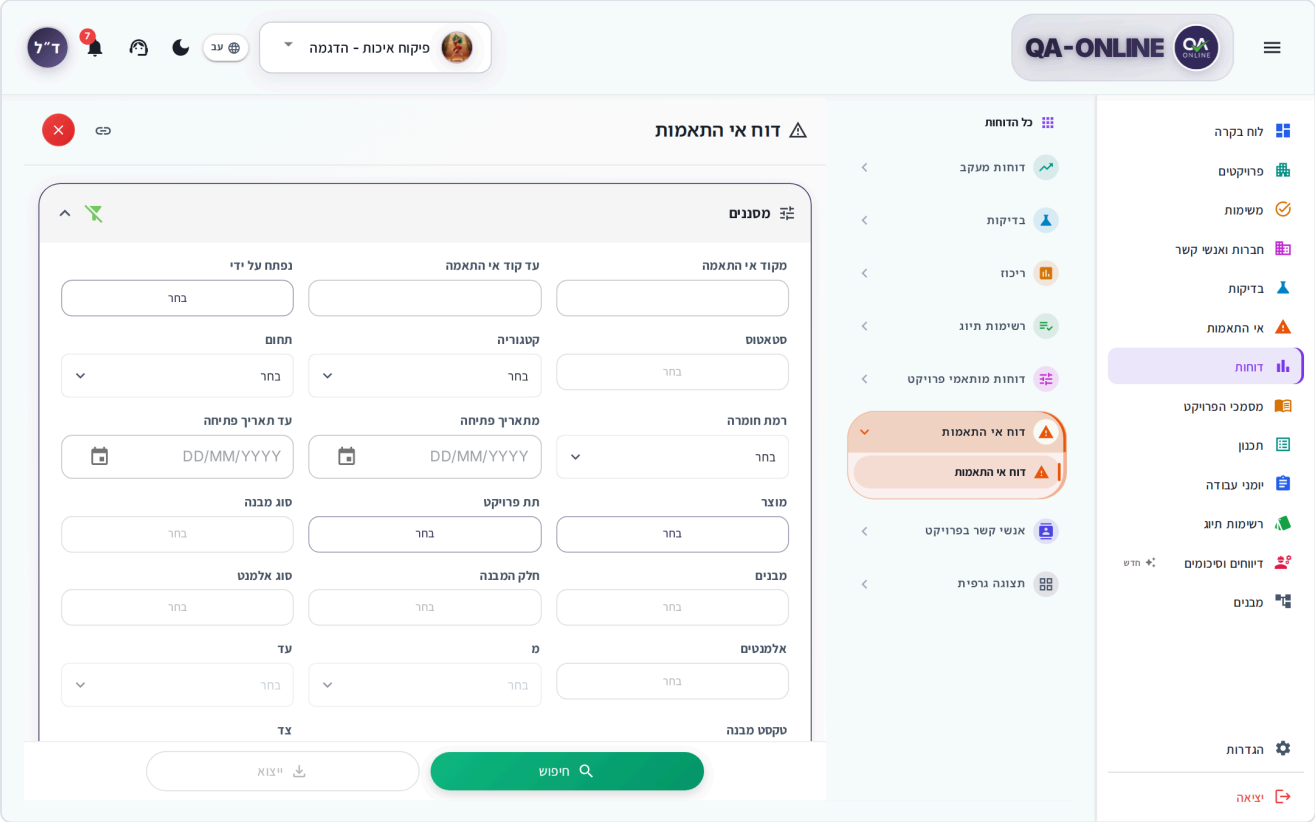
The table shows all the reports in the system. You only see the reports that are allowed for your role, and a category with no allowed reports isn't shown.

Category	Reports	What it's for
Progress Reports	**Tasks report**, **Open documents report**, **Quality annotations report**, **Punchlist Report**, **Punchlist 2 Report**	Tracking tasks, open documents, document remarks, and punchlist items
Tests	**Inspection Results Report**, **Exam Order Report**, **Inspection Details Report**, **Survey Results Report**, **Concrete Fail Report**, **Lab Response Time Report**	Lab and survey results, orders, failures, and response times
Summary	**Suppliers report**, **Products report**, **Delivery report**, **Periodical Report**	Suppliers and materials, the handover file, and a periodic summary
Project Data Summary	**General BI Checklists**, **General BI NCR**, **MultiKPI_Master**, **TMTGL_ITO**	Data summaries in an Excel file
Checklists	**Checklist Report**, **Checklist Report By Elements**, **Open checklist steps report**, **Activity Status Report**, **Elements Status Report**, **Checklist Status Report**, **Checklist Step Status Report**, **Punchlist by Checklists report**, **Concrete Results By Checklists**, **Pile Report**, **Slari report**, **Rock Anchor Report**	Checklist completion status, open steps, and execution data

Category	Reports	What it's for
Project Excel Reports	**Material approvals**, **Mockup**, **Suppliers & Sub Contractors Approvals**, **Subcontractor Approvals - NETA Format**, **Guardrail Installation Tracking - NETA Format**, **Non Conformance Concentration**	Excel reports in the format the client requires
Non-conformance report	**Non-conformance report**	A list of non-conformances by filters, with export
Project contacts	**Project contacts**	The contacts and companies in the project
Graphical View	**Layers Report**, **Progress report**	Execution status by structure, layers, and segments

How to produce a report

1. Open the category and click the report name, or find it with **Search reports…**. The report opens in a full window.
2. In the **Filters** section, choose what you want to see (see below).
3. Click **Search**. The results load into the table.
4. Review the results, and sort and filter by column as needed.
5. To download, click **Export** and choose a file type.
6. To go back to the list of reports, close the window with the X.



A report window with filters, a results table, and the search and export buttons

> **Tip:** Before you search, the message **Set filters and click Search to load results.** is shown. If, after you search, you see **No data to display**, widen the filters and try again.

How to choose filters

Each report has its own filters, but most of them repeat:

- **Number range** – for example **From order number** / **To order number**, or **From NC code** / **To NC code**. If you fill in only the "From" field, the report searches for that number only.
- **Date range** – **From date** / **To date**, and in some reports also the order date, casting date, or sampling date.
- **Status**, **Severity level**, **Ordered by**, **Raised by**, **Suppliers**, **Labs**, and more – depending on the report type.
- **Location** – **Project partition**, **Structure type**, **Structures**, **Structure part**, **Element type**, **Elements**, segments (**From** / **To**), and **Side**.

In filters with multiple selection, a list window opens. Select one or more items and click **OK**. The field shows how many items are selected, for example "3 selected".

To reset all the filters, click the **Clear filters** icon.

> **Important:** Some reports have required filters. Until they're filled in, a message tells you what's missing (for example **Select project partition and structure to search or export.**), and the buttons are inactive.

How to work with the results table

- **Sorting and filtering by column** – in each column header. The full explanation is in Common tools.
- **Opening an item** – clicking the code in a row opens the item's Detail window (checklist, test order, non-conformance, or document) without leaving the report.
- **An item's PDF report** – in the **Non-conformance report**, clicking the row itself (not the code) opens the PDF report. In the checklist and test reports, click **Open PDF** in the row.

> **Tip:** Exporting to Excel includes only the rows that remain after you filter the columns. That way you export exactly what you see.

How to download a report

1. After you search, click **Export** at the bottom of the window.
2. Choose a file type. The options depend on the report:
   - **Export to Excel** – an Excel file with the results. This is the option in most reports.
   - In the **Non-conformance report** – **Export to Excel**, **Documents** (a ZIP file with the non-conformance documents), and **Export to NATI** (Excel in the Netivei Israel format).
   - In the **Checklist Report** – the **Export Checklists** window opens. Choose a **Checklist Type**, then ZIP or Excel.
3. The file is prepared in the background. Progress is shown in the **Downloads** window, and you can keep working in the meantime.
4. An Excel file downloads directly to your device, and you'll see the message **Excel file downloaded.** PDF and ZIP files open first in a preview, and you download from there.

> **Note:** If you choose **Export to Excel** without filters, you'll see the question **Export without filters?** because the file may include all of the project's data. Click **Export anyway**, or **Cancel** to add filters.

Reports that download directly to Excel

In the **Project Excel Reports** and **Project Data Summary** categories, there's no table on the screen:

1. Open the report.
2. Choose filters (for example **From number**, **From date**, **By Structure**).
3. Click **Results**. The Excel file is prepared in the background and downloads to your device.

How to produce a Delivery report

The **Delivery report** gathers the project's documents into a handover file.

1. Open **Summary** > **Delivery report**.
2. Choose a **Project partition** (required) and, if needed, also a structure, dates, and segments.

3. In the table, select the reports you want to include in the **Requested report name** column.
4. For each report, mark whether you need **Mark to generate documents** (attaching the documents themselves) and **Include without structure** (also items with no location).
5. Click **Generate**. The message **Request sent successfully.** appears.

The file is prepared outside the Reports screen, and it doesn't download to your device right away.

> **Don't see this option?** **Generate** is active only after you choose a project partition and select at least one report.

Special reports

Periodical Report

This report gathers what was done in the project within a date range, in tabs: **Inspections**, **Checklists**, **N.C**, **Quality Docs**, and **Drawings**. Next to each tab you'll see the number of rows, and from each row you can open the item's PDF.

Graphical View

- **Layers Report** – opens in its own window. Choose a **Project partition** and **Structures** (required) and click **Search**. The result is a color-coded table of elements and layers by segment, with a color legend.
- **Progress report** – opens in the **Progress Layers Report** window. It has no table on the screen: choose a **Project partition**, a **Structure type**, and at least one structure, and click **Export** to download Excel.

How to see what's behind a cell in the Layers Report:

1. Click a cell in the table. The **Segment details** window opens.
2. Under **Related documents**, you'll see the segment's checklists, non-conformances, and lab orders.
3. Click **Open PDF** next to a document to view it.

Project contacts

A table of all the contacts and companies in the project. Type in **Filter table by text** to narrow the list, and click **Export to Excel** to download. To manage contacts, see Companies and contacts.

Report permissions

Not every user sees every module and action. Permissions depend on your role in the project. If a module or button is missing, contact your project manager or your organization's system administrator.

In Reports, each report is shown only to the roles that are allowed to use it. If you open a link to a report you don't have permission for, you'll see the message **You do not have permission to access this report.**

On your phone

- The navigation list is hidden. Tap **Browse** next to the title to open the list of categories and reports.
- Inside a category, a horizontally scrolling row of tags appears (**All** and the category names) for quick switching.
- In the report window (on a tablet too), the **Filters** section is collapsed when it opens. Tap it to choose filters. **Search** and **Clear filters** are at the bottom of the screen.
- After a successful search, the filters collapse again so the results appear right away.
- Wide tables scroll sideways. For large reports, it's better to work on a computer or export to Excel.

FAQ

The report shows "Result set is too large to display in the browser". What do I do? Narrow the filters (for example, a shorter date range) and search again, or export directly to Excel.

Why don't I see a report that my colleague sees? Reports are shown according to your role in the project. Contact your project manager to get permission.

The Search or Export button is greyed out. A required filter is missing. The message above the buttons says what you need to choose.

I see "Select a project first." Choose a project in the project selector and open the report again.

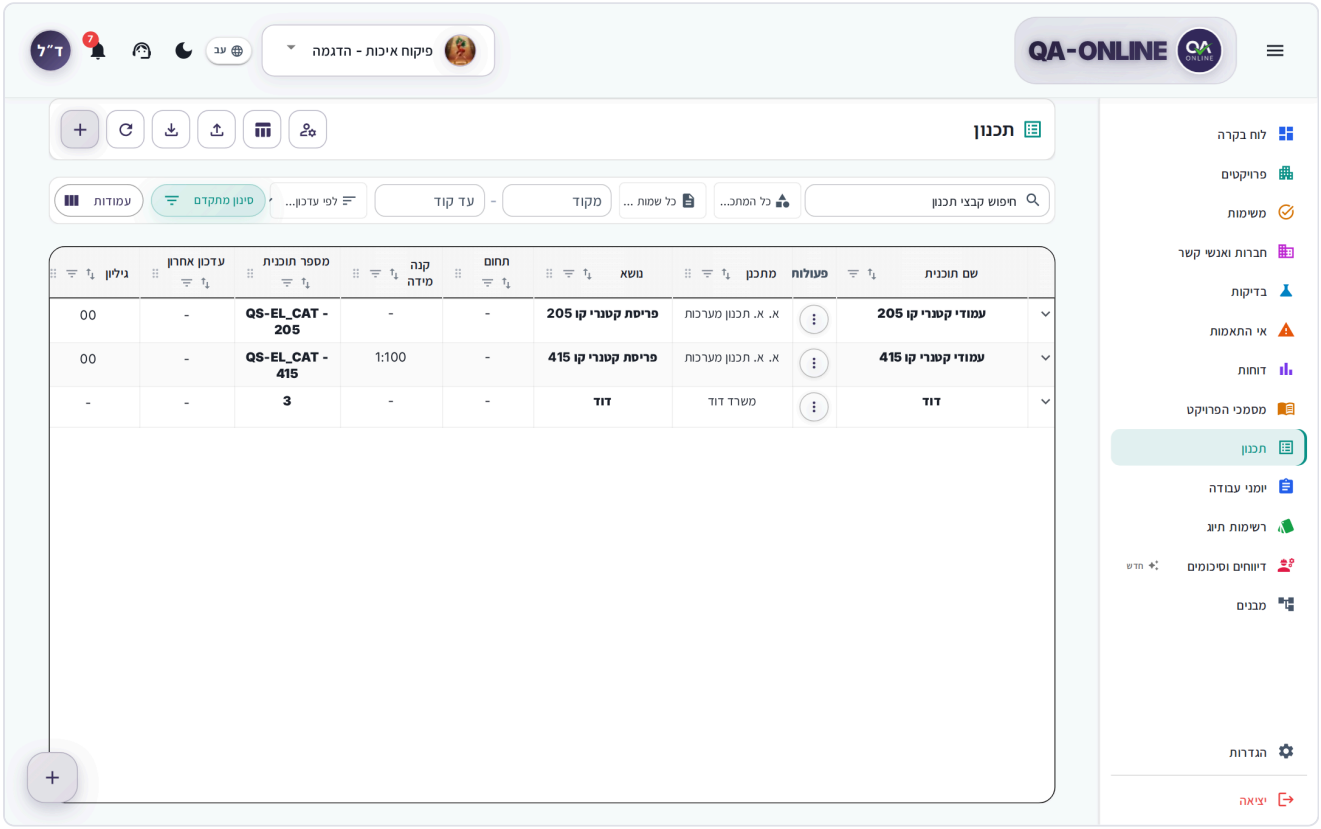
See also

- Non-conformances – working on individual non-conformances, which the report consolidates.
- Checklists – the source of the checklist reports and the graphical view.
- Tests – the lab and survey orders that appear in the test reports.
- Common tools – column filtering, preview, and downloading files.

Design

Manage the project's drawings and plans – each drawing with its versions and files, plus viewing and marking up the drawing.

The **Design** screen is the project's drawing repository. Each drawing has a number, name, planner, and scope, with a list of versions beneath it. You attach files to each version (PDF, DWG, PLT, and more), and one of the versions is marked as current. Project managers and design coordinators upload and update drawings, while supervisors and site teams open them in the field, mark up notes, and download them.



The Design screen in table view with one row expanded to show versions

What you see on the screen

At the top of the screen is the **Design** title, with these buttons next to it:

Button	What it does
View mode	Switches between **Table** and **Cards** (on a computer)
Import icon (**Import from Excel/CSV**)	Imports a list of drawings from a file (see below)
Export icon (**Export to Excel**)	Exports the list of drawings to an Excel file
+ (**Add drawing**)	Creates a new drawing

Below the title, you'll see how many drawings are shown out of the total, for example "12 of 40 drawings".

View modes

- **Table** – one row per drawing, with columns such as **Drawing number**, **Plan name**, **Subject**, **Planner**, **Scope**, **Scale**, **Version**, **Stage**, **Purpose**, and **Last Update**. Clicking a row opens or closes its list of versions.
- **Cards** – one card per drawing. At the top of the list, choose what to group by: **Plan name**, **Planner**, **Subject**, or **Scope**.

Choosing and arranging table columns is explained in Common tools.

> **Tip:** Every row has an actions menu (**Row actions**). On a computer, you can also open it by right-clicking the row, and the same goes for a version row.

How to search and filter

1. Type in the **Search design files...** field – a number, name, or subject.
2. For a range of drawings, fill in **From number** and **To number**.
3. Choose a **Planner** (the default is **All planners**) or a **Plan name** (the default is **All plan names**).
4. To change the order, choose **Sort by**: **By last update**, **By drawing number**, **By plan name**, **By subject**, or **By planner**.
5. To filter by update date, click **Advanced Filters** and fill in **From date** / **To date**.

To clear all filters, click **Clear All**. If there are no results, you'll see **No design files match your search.**

How to add a drawing

1. Make sure the right project is selected in the project selector.
2. Click **+** at the top of the screen. The **Add drawing** window opens with two tabs.
3. On the **Plan** tab, fill in **Drawing number** (required), **Plan name**, **Subject**, **Scope**, **Scale**, **Sheet**, and **Planner**.
4. Go to the **Version** tab and fill in **Version**, **Date**, **Stage**, **Purpose**, and **Remarks**. **Version**, **Stage**, and **Purpose** are required.
5. On the same tab, attach the drawing's files. They're marked **Pending upload** and upload after you save.
6. Click **Save**. Progress is shown in steps: **Saving drawing…**, **Saving version…**, **Uploading files…**.

> **Note:** If the drawing was saved but the version or the files weren't, you'll see the message **The drawing is already saved. Fix the version or files and tap Save again.** You don't need to create the drawing again.

How to manage versions

Each drawing keeps a history of versions, so you can always see which drawing is current and what changed.

How to see the versions

1. In table view, click the drawing's row. In card view, open the card.
2. The **Current plan** section shows the version that was marked as current, with its stage, purpose, and files, and the **Current** tag.
3. For earlier versions, click **History** (the number of versions is shown next to the button). The **Plan history** table opens.

If no version was marked as current, you'll see the message **No current plan marked**.

How to add a new version

1. In the drawing's actions menu, choose **Add version**.
2. Fill in **Version**, **Date**, **Stage**, **Purpose**, and **Remarks**.
3. For the version to appear as the current drawing, select **Current version**.
4. Click **Save**.

> **Tip:** When a new issue of a drawing arrives, add a version instead of replacing files in an existing version. That way the history is kept.

How to edit or delete a version

1. On the version row, open the actions menu.
2. Choose **Edit version** to update the details, or **Delete version**.
3. To delete, confirm with **Delete** in the **Delete version** window.

> **Note:** Before you delete a version, make sure you don't need the files attached to it.

How to upload files to a version

1. In the version's actions menu, choose **Add files**.
2. In the **Add files to drawing version** window, drag files in or click to choose them. You can upload several files of any type.
3. Click **Upload**.

The file types most common in design:

Type	What you can do in the system
PDF	View, mark up notes, and save

Type	What you can do in the system
DWG / DXF	View the drawing, zoom in and out, edit
PLT (plot)	View and edit
Image	View and edit in the image editor
ZIP	Browse the folders and files inside the archive
Excel and others	Preview or download

How to replace or delete a file

1. In the version's actions menu, choose **Manage files**. This option appears only when the version has files.
2. Choose the file from the list.
3. Choose **Replace** to upload a different file in its place, or **Delete file** and confirm with **Delete**.

To go back to the previous list in the menu, choose **Back**.

How to open a drawing

1. In the version's file list, click the file name.
2. The file opens in a preview inside the system, with no extra software.
3. To download it, click **Download** in the preview window.

A file that has no preview downloads directly to your device.

Viewing a DWG or PLT drawing

The drawing loads in a full window. While it loads, you'll see **Please wait while we prepare the drawing**.

- **Zoom in** / **Zoom out** – change the zoom. You can also use the mouse wheel, or pinch on a phone.
- **Zoom to fit** – shows the whole drawing on the screen.
- Drag to move the drawing.

Screenshot

A DWG drawing open in the preview with zoom buttons

`images/13-dwg-preview.png`

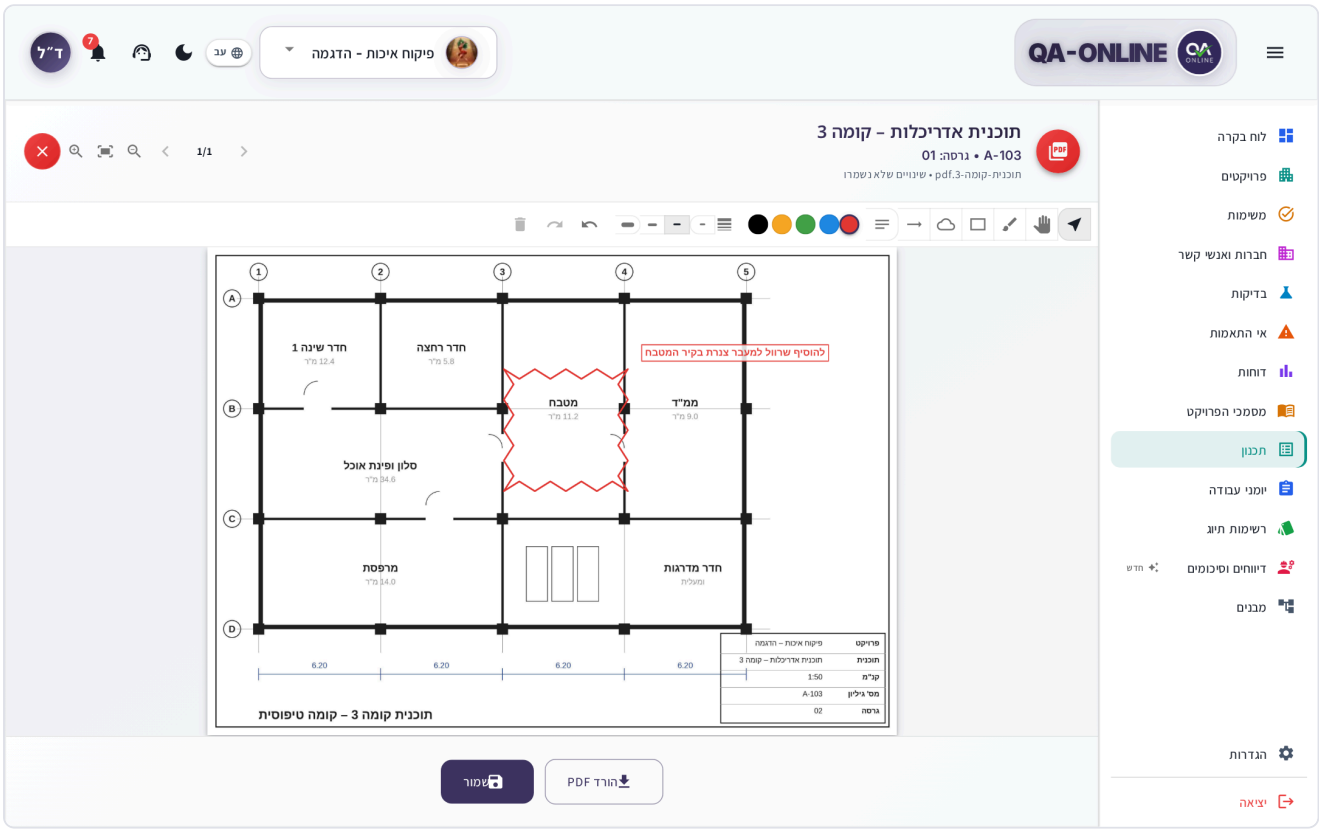
ZIP file

A ZIP file opens as a folder browser. When you upload a complete drawing package (a drawing with references, fonts, and images), the system shows the drawing with all its parts. For details, see How to work with a ZIP file.

How to mark up notes on a PDF

You can mark up a PDF drawing directly – for example, circle an area with a cloud and write a note – and save the marked-up file in the version.

1. In the version's actions menu, choose **Manage files**.
2. Choose the PDF file, then **Edit** and the file name. The **Edit PDF** window opens.
3. Choose a tool from **Markup tools** (see the table).
4. Choose a color and **Stroke width**.
5. Mark up the drawing. To move between pages, click **Previous page** / **Next page**.
6. Click **Save**.
7. In the **Replace PDF?** question, click **Replace & save**.



The Edit PDF window with the markup toolbar and a cloud and note on the drawing

Tool	What it does
Select	Select an existing mark to move or delete it
Pan	Drag the drawing without marking
Pen	Freehand drawing
Rectangle	A rectangular frame
Cloud	A revision cloud to circle an area

Tool	What it does
Arrow	An arrow that points to a detail
Note	Click the drawing, type text in **Enter note text…**, and click **Add**

- **Undo** / **Redo** – undo or redo the last action.
- **Delete selected** – deletes the selected mark.
- **Download PDF** – downloads the file with the marks, without saving it in the system.

Note: Saving replaces the PDF file in the version, and no new version is created. The marks are burned into the pages: after you save, you can't move or delete them, and a page that was marked up is saved as an image (you can't select text on it). To keep the original, first add a new version and upload the file to it.

Tip: If you close the window with unsaved changes, you'll see the question **Discard changes?**. Click **Keep editing** to go back, or **Discard** to leave without saving.

How to edit a DWG or PLT drawing

1. In the version's actions menu, choose **Manage files**.
2. Choose the file, then **Edit** and the file name. The **Edit drawing** window (DWG or DXF) or **Edit plot** window (PLT) opens.
3. Edit the drawing:
   - In a plot: **Draw**, **Revision cloud**, **Arrow**, **Note**, **Crop**, **Rotate 90°**, and the choice of **Active pen** (color and stroke width).
   - In DWG: use the drawing tools in the edit window.
4. Click **Save** and confirm with **Replace & save**.

To download a copy without saving, click **Download DXF** (in a DWG or DXF drawing) or **Download PLT**.

Note: As with PDF, saving replaces the file in the version and doesn't create a new version.

Important: You can edit only text-based PLT files. If you see **Binary PLT files cannot be edited**, you can still view the file and download it.

How to edit or delete a drawing

1. In the drawing's actions menu, choose **Edit drawing**.
2. Update the number, name, subject, scope, scale, sheet, or planner, and click **Save**.

To delete, choose **Delete drawing** and, at the question **Are you sure you want to delete this drawing?**, click **Delete**.

> **Note:** Deleting a drawing removes it from the list along with its versions. Make sure you chose the right drawing.

How to send a drawing for action

You can create a task that's linked to a drawing, for example "Update according to the supervisor's comments":

1. In the drawing's actions menu, choose **Add task**.
2. Fill in the task details and choose who it's for.

The task appears for the recipient in Tasks, and clicking it opens the drawing in the Design screen.

How to import a list of drawings from Excel

When you have a ready list of drawings (for example, from the design office), you can import it all at once:

1. Click the import icon (**Import from Excel/CSV**). The **Import drawings** window opens.
2. In the **File** step, drag in an .xlsx, .xls, or .csv file, or click to choose one.
3. In the **Sheet** step, choose the sheet in the file.
4. In the **Map** step, match each column in the file to a field: **Drawing number** (required), **Drawing name**, **Subject**, **Design office**, **Version**, **Version Date**. The system maps automatically when it can.
5. In the **Preview** step, check how many rows are ready to import and how many will be skipped (missing drawing number).
6. Click **Import**. When it finishes, a summary is shown, for example **Import finished: 35 imported**.

How to export to Excel

1. Filter the list as needed.
2. Click the export icon (**Export to Excel**).
3. The file is prepared in the background and opens in a preview, and you download it from there. See Exporting to Excel and PDF reports.

On your phone

- The screen always appears in **Cards** view.
- Opening and editing PDF, DWG, and PLT files also work on a phone. Pinch to zoom and drag to move.
- When you edit a PDF on a phone, the active tool on opening is **Pen**, and the drawing is fitted to the screen width. When you edit a plot, the tool on opening is **Pan**.
- For precise markup, it's better to work on a tablet or a computer.

FAQ

Do I need AutoCAD to open a DWG file? No. DWG, DXF, and PLT files open directly in the system, including on a phone.

I saved markup on a PDF. Is the original file kept? No. Saving replaces the file in the version, and the marks are burned into it. To keep the original, create a new version before you mark up.

How do I know which version is current? It appears in the **Current plan** section with the **Current** tag. You set it in **Edit version** > **Current version**.

I see "File not found". The file was deleted or wasn't uploaded properly. Upload it again with **Add files**, or contact whoever uploaded the drawing.

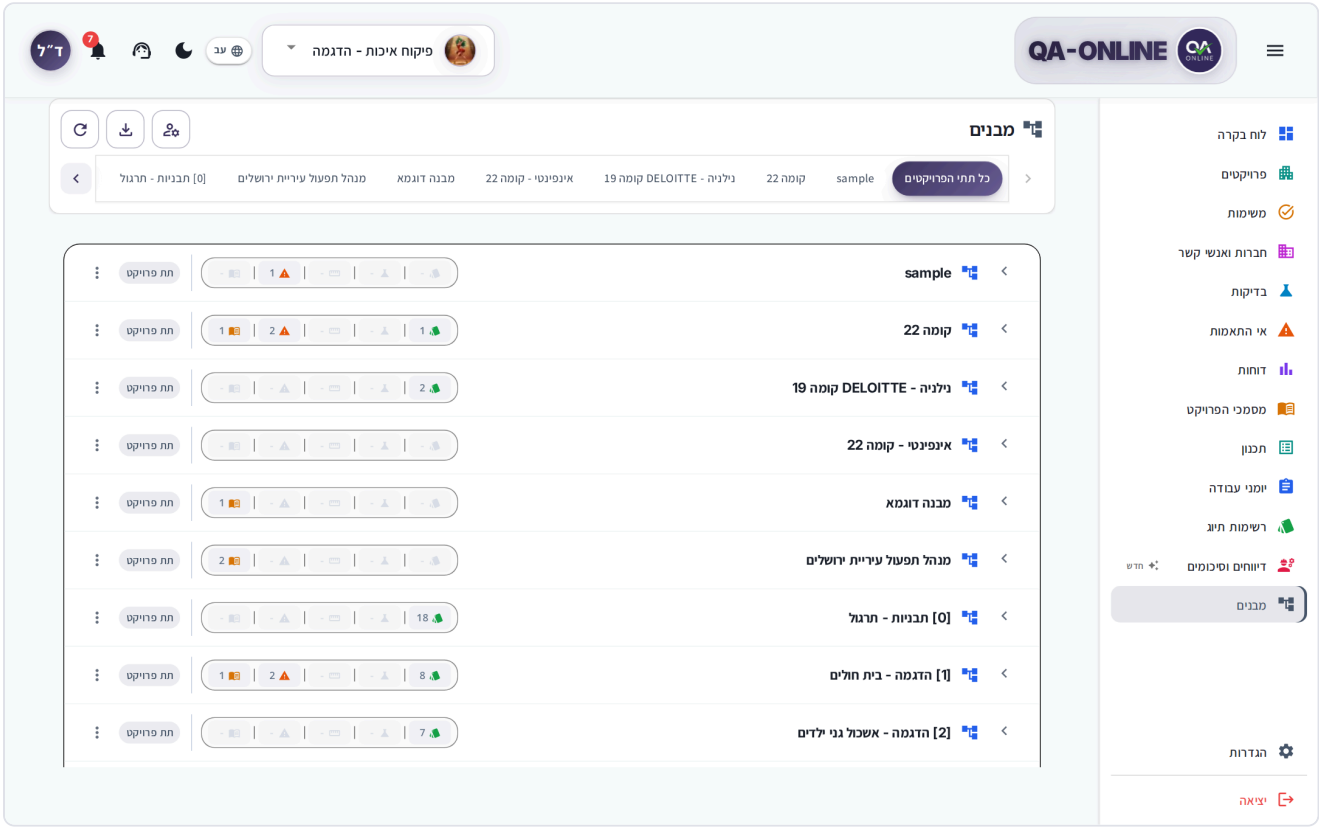
See also

- Common tools – preview, ZIP files, the image editor, and export.
- Tasks – track tasks that were created from a drawing.
- Reports – the **Periodical Report** includes a **Drawings** tab.
- Project documents – quality documents that aren't drawings.

Structures

Browse the physical structure of your project – subprojects, structures, sub-structures, and elements – and see how many documents each location has.

The **Structures** screen shows your project's location hierarchy, from the subproject down to a single element. It's the same hierarchy you pick a **Location** from in Checklists, Non-conformances, work logs, MOMs, and tests. Inspectors, quality managers, and project managers use it to check "what's happening in this building" or to open a new document straight from a location.



The Structures screen with the hierarchy tree and the subproject bar

Important: This screen is view-only for everyone. You can't add, rename, or delete structures and elements here. If a structure is missing or a name is wrong, contact your organization's system administrator or open a support request.

How the hierarchy is built

Each level opens into the level below it:

Level	Example
Partition	Phase A, Lot 3

Level	Example
Structure	Building A
Sub-structure	Floor 4
Element type	Columns, slabs
Element	Column C-12

Some elements (a road or a pipeline, for example) also have **Segments** and **Sides**. An element marked **Continuous** is measured along its length and divided into segments.

> **Tip:** The levels in the location picker on every form are exactly the levels on this screen. If a location is missing here, it's missing from the picker too. For more on the location picker, see Common tools.

How to open the screen

1. Choose a project in the **Project selector** in the top header.
2. In the side menu, click **Structures**.

If no project is selected, you'll see the message "Select a project from the header to browse partitions and the element hierarchy."

How to browse the structure tree

1. In the bar at the top of the screen, pick a subproject, or leave **All partitions** selected.
2. Click the arrow next to a row to open it (**Expand**). Click it again to close the row (**Collapse**).
3. Keep expanding until you reach the level you want.
4. For an element with many segments, click **Load more segments**.

> **Tip:** In projects where subprojects are nested inside each other, a subproject tree with a **Search partitions** field appears in place of the bar. Type part of a name to filter.

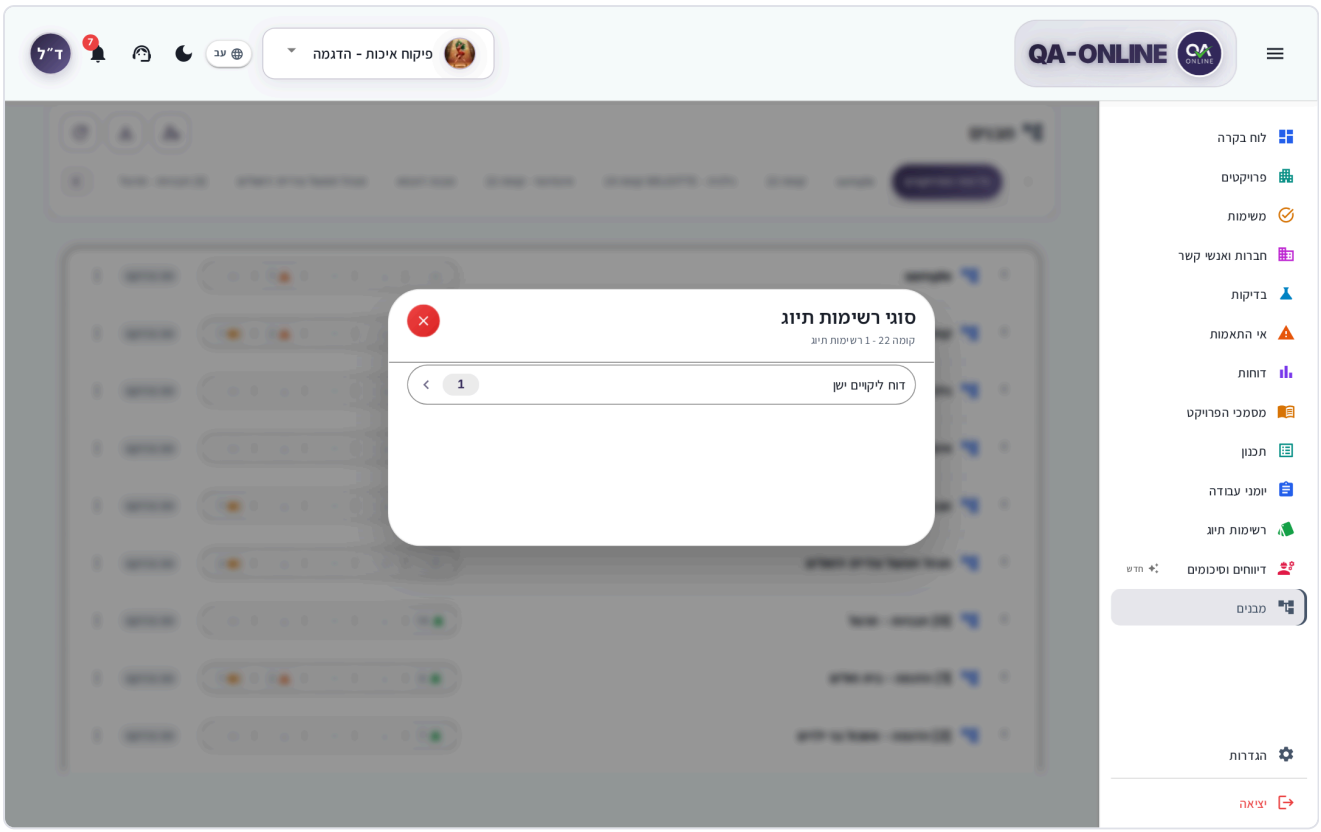
If a level is empty, you'll see a message such as "No structures in this partition." or "No elements." If loading failed, click **Retry**.

How to see how many documents are at each location

Every row in the tree, from the subproject down to the element, shows counters by module: **Checklists**, **Exam Orders**, **Survey Orders**, **Non Conformances**, and **Project Documents**.

1. Click one of the counters.
2. A window opens with a breakdown by type (by status for Non-conformances), with the count on each line.

3. Click a line in the window to go to the matching module, filtered to that location and type.



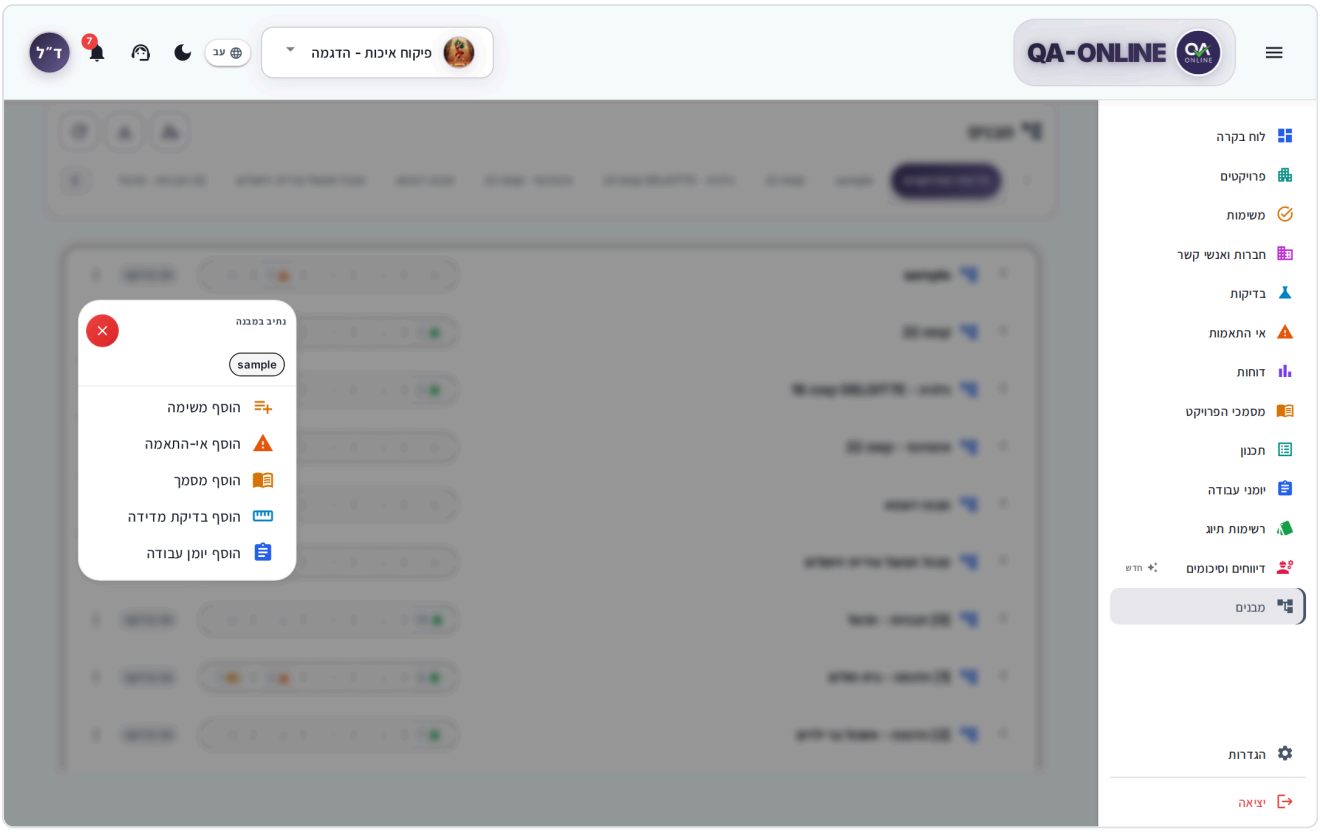
The type breakdown window opened from the Checklists counter

> **Tip:** This is a quick way to answer questions like "how many open Non-conformances are there in Building B?" without building a report.

How to create a new document from a location

The row's location is filled in on the form automatically.

1. Find the row you want in the tree (a floor or an element, for example).
2. Click the three-dot icon at the end of the row (**Row actions**), or right-click the row.
3. Check that the **Structure path** at the top of the menu is the right location.
4. Choose an action: **Add task**, **Add non-conformance**, **Add document**, **Add Lab Order**, **Add Survey Order**, or **Add work log**.
5. Complete the form that opens and save, just as you would when creating one from the module itself.



The row actions menu with the structure path and the list of actions

> **Tip:** **Add Lab Order** appears only on element rows.

> **Don't see this option?** An action that's grayed out is one you don't have permission to perform. Not everyone sees every module and action. Permissions are set by your role in the project. If a module or button is missing, contact your project manager or your organization's system administrator.

For more on the forms themselves, see Tasks, Non-conformances, Tests, Work logs, and Project Documents.

How to export the structures list

1. In the screen header, click the export icon (**Export structures PDF or Excel**).
2. In the **Export** window, choose **PDF** or **Excel**.
3. The file is prepared in the background and appears in the **Downloads** window at the bottom of the screen. You can keep working in the meantime.

The export includes the entire hierarchy of the selected subproject (or of all subprojects) down to the element level, including rows you haven't expanded. The columns are **#**, **Kind**, **Name**, **Type**, **Code**, **Serial**, and **Path**. The PDF report is called **Structures report**, and it also includes the project name, the scope, the number of items, and who prepared it.

> **Note:** If the project has no structures, the button is disabled and shows "No structures to export".

For more on the Downloads window and preview, see Common tools.

How to refresh the screen

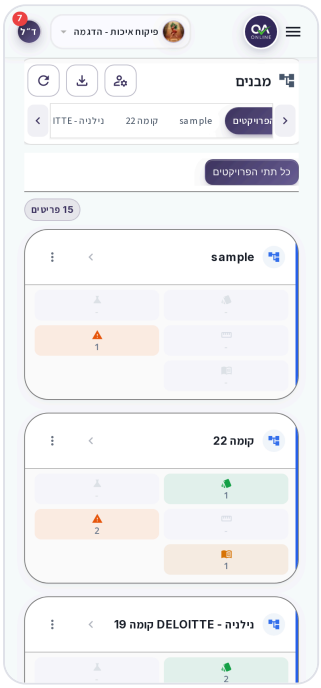
If structures were added recently and you don’t see them, click **Refresh** in the screen header. The tree reloads.

On your phone

On a phone, the tree appears as cards, one level at a time:

1. Tap a card to go into the level below it.
2. To go back, tap a level in the breadcrumb at the top of the screen, or tap **Go back**.
3. At the element level, you’ll see its segments and sides. If there are none, you’ll see the message "No segments or sides for this element."

The document counters and the **Row actions** menu are available on your phone too.



The Structures screen on a phone with the breadcrumb and level cards

Frequently asked questions

Can I add a floor or an element myself? No. This screen is view-only. Contact your organization’s system administrator or support with the details.

Why doesn’t a certain location appear in the location picker? It may not be defined in the project, or your permissions may be limited to some of the structures. Check whether it appears on the **Structures** screen, and if it doesn’t, contact your project manager.

The counter shows a number, but I see fewer items in the module's list. The module may have additional filters turned on. Clear the filters in the module and check again.

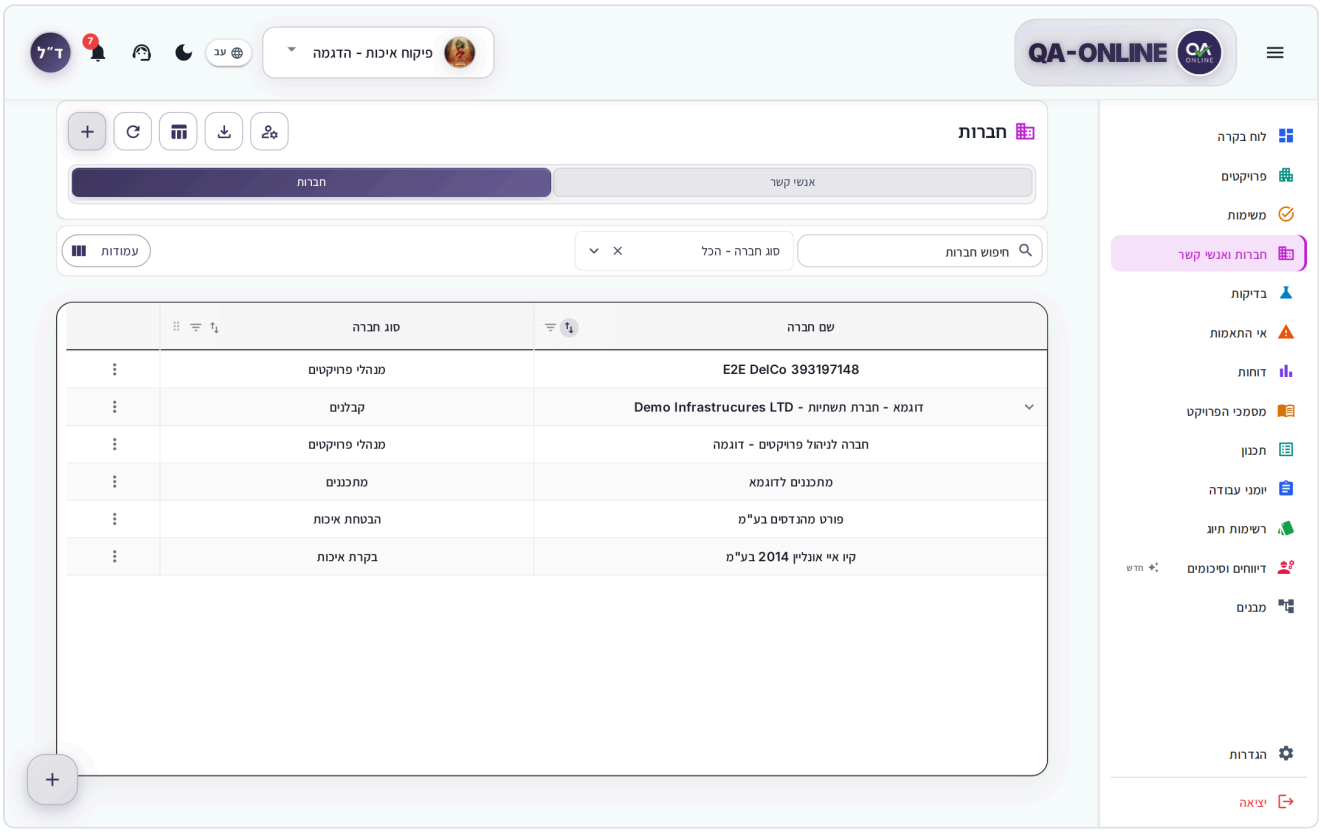
See also

- Common tools – the location picker, export, and the Downloads window.
- Checklists – open a checklist for the location you chose.
- Non-conformances – handle the Non-conformances counted in a structure.
- Reports – broader analysis by structure.

Companies and contacts

Manage the companies that work on the project – contractors, subcontractors, suppliers, and consultants – and their contacts.

Project managers, quality managers, and office staff use this screen. The companies and contacts you define here are the ones that appear throughout the rest of QA-Online – for example, when you choose the responsible contractor for a Non-conformance, a supplier for a test, or a signer in an approval step.



The Companies & Contacts screen on the Companies tab, in table view

How to open the screen

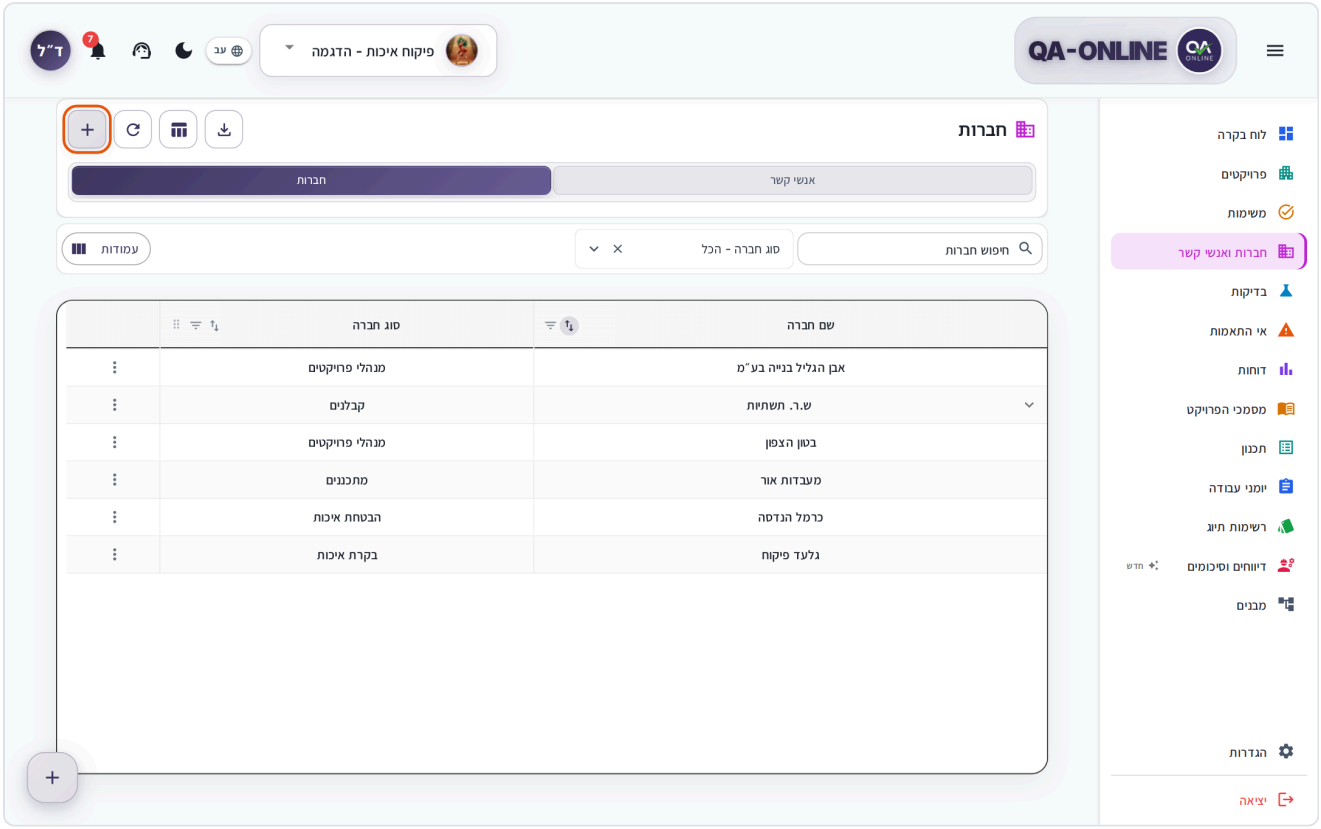
1. Choose a project in the **Project selector**.
2. In the side menu, click **Companies & Contacts**.
3. At the top of the screen, choose a tab: **Contacts** or **Companies**. QA-Online remembers the last tab you chose.

Tab	What you see
Companies	All the companies in the project, grouped by company type. This is where you add companies and contacts
Contacts	A single list of every contact from every company, for browsing and quick search

> **Tip:** You add companies and contacts only on the **Companies** tab. The **Contacts** tab has no add button.

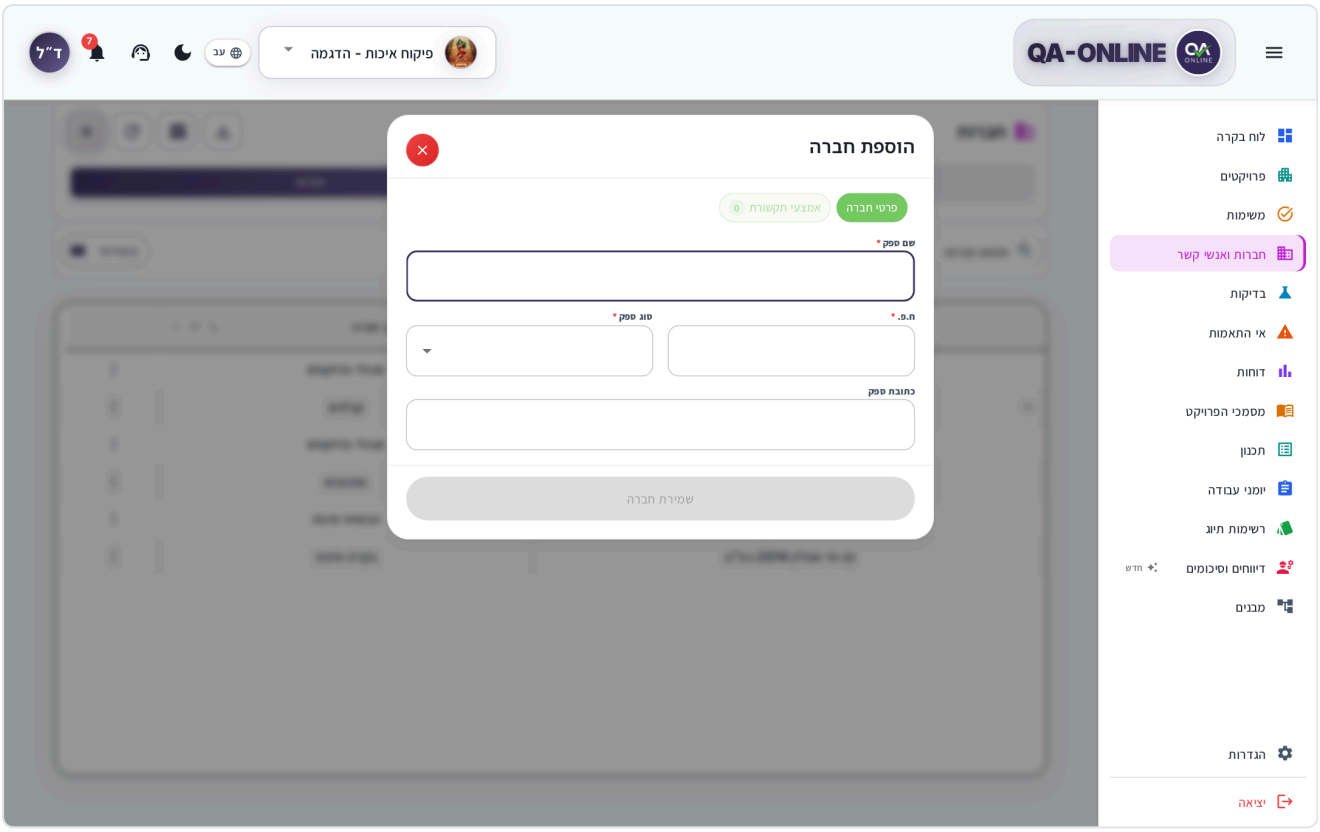
How to add a company

1. On the **Companies** tab, click **+** (**Add company**) in the header. You can also click the add button inside a specific type group – the company type is then filled in for you.



The Companies tab, with the + button in the header highlighted

2. The **Add company** window opens on the **Company details** tab. Enter a **Supplier name**.



The empty Add company window with the Supplier name, Company Number, Supplier type, and Supplier address fields

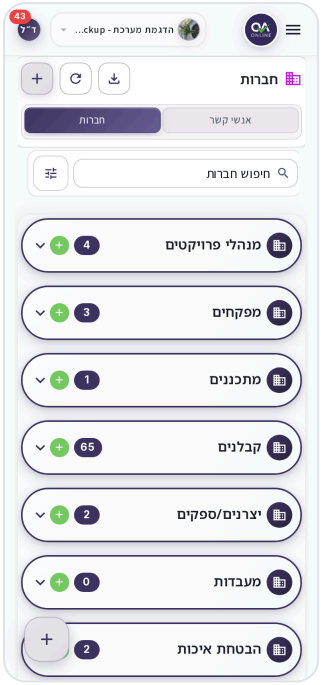
3. As you type, QA-Online searches and shows:
    - **Similar companies in the system** – companies that already exist in QA-Online. If your company is in the list, click it. Its existing contacts are shown, and they're linked to the project when you save.
    - **Official registry matches** – companies from the Companies Registry. Selecting a result fills in the company number and the address.
4. Enter the **Company Number** (9 digits). If the number is found in the registry, you'll see **Verified with Israeli Companies Registry**, and the name is filled in automatically.
5. Choose a **Supplier type** (for example, contractor, supplier, or consultant). Optional: enter a **Supplier address**.
6. On the **Communications** tab, click **Add communication** and add a phone, mobile, fax, or email. You can add each type once.
7. Click **Save company**.

> **Note:** If the company number is in the registry but the company isn't active there, you'll see **Found in registry** along with its status. You can continue, but we recommend checking the status before you save.

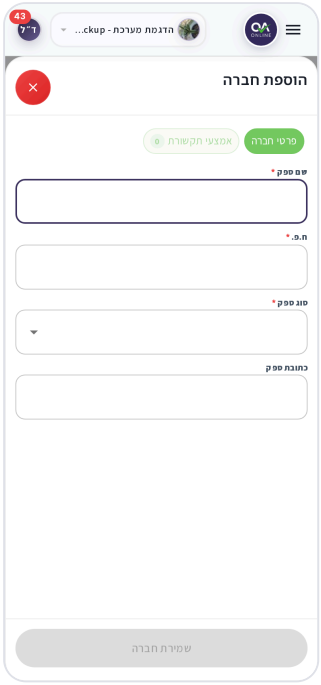
> **Tip:** If the company number isn't found in the public registry, you can continue and enter the details manually.

On your phone

1. Companies are shown as groups by type. Tap **+** at the top of the screen, or the green **+** in a group to have the company type filled in for you.
2. The **Add company** window opens full screen. Fill in the fields and tap **Save company** at the bottom.



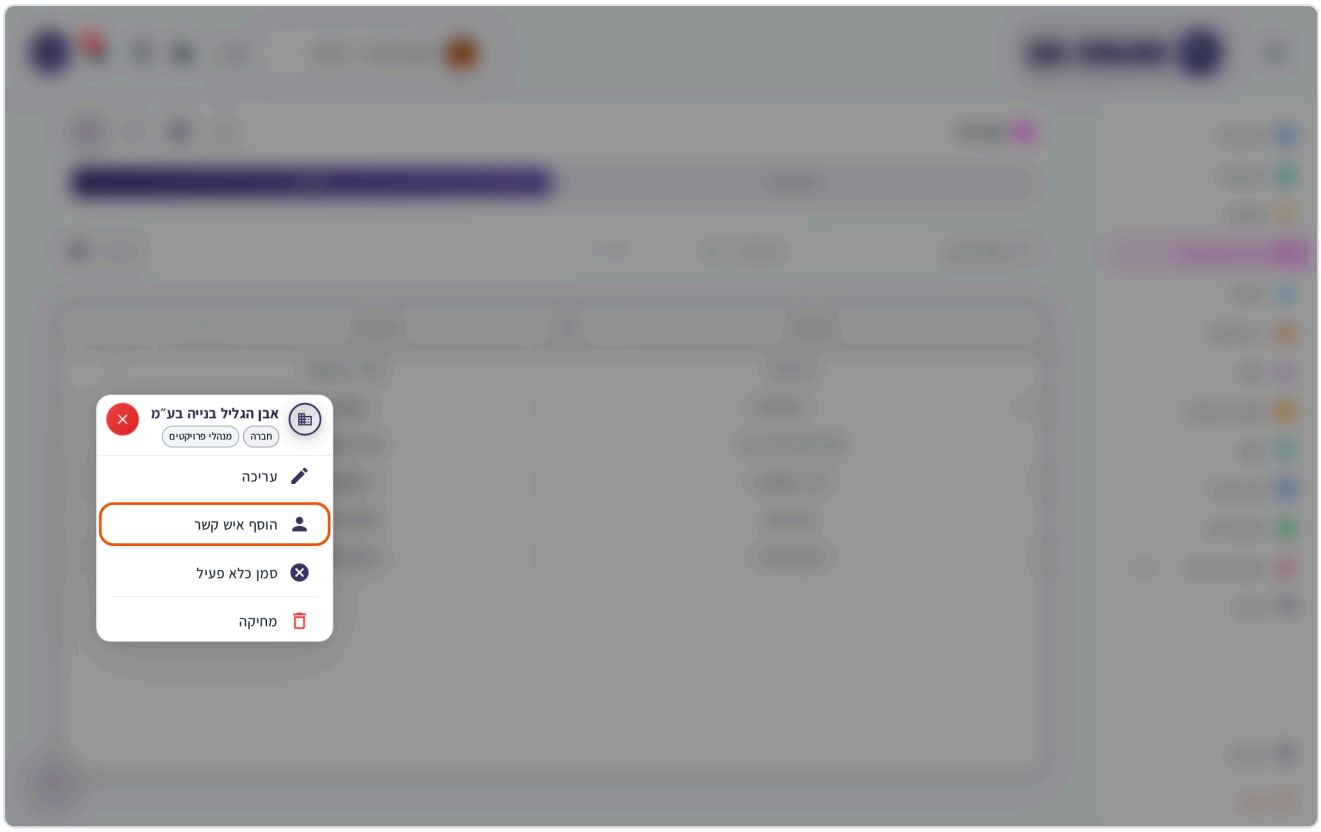
Companies on a phone, grouped by company type with the number of companies



The Add company window on a phone

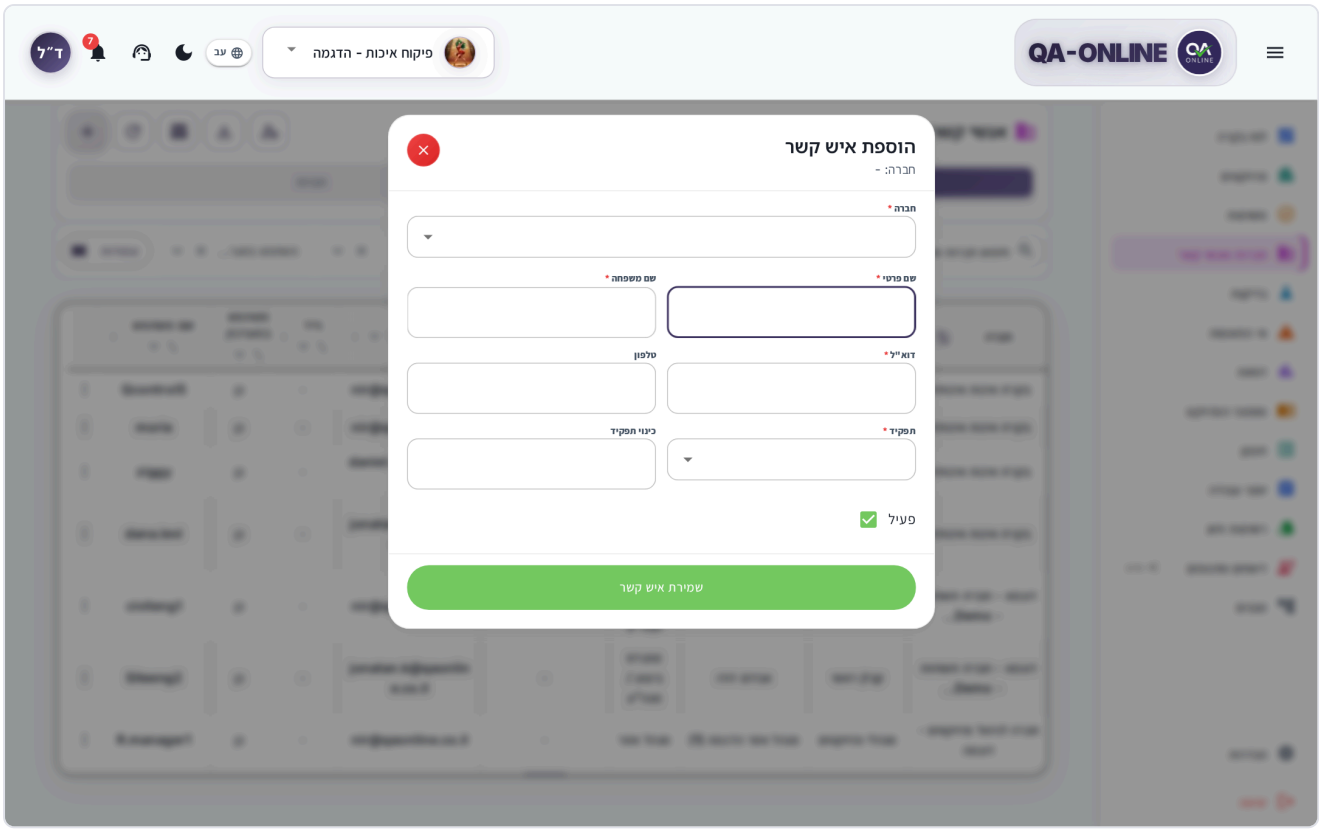
How to add a contact to a company

1. On the **Companies** tab, open the company's row menu (three dots) and choose **Add contact**.



A company's row menu, with the Add contact item highlighted

2. In the **Add contact** window, choose one of two options:
    - **Add new contact** – fill in **First name**, **Last name**, **Email**, **Phone**, and **Role**. Optional: **Role nickname**.
    - **Add contact from pool** – choose a **Contact** who's already registered with the company in QA-Online, then choose a **Role**.



The Add contact window with the New contact and Contact from pool tabs

3. Make sure the **Active** switch is on.
4. Click **Save contact**.

> **Important:** The **Role** determines how the contact is used in the project – for example, who signs or who receives Non-conformances. Your system administrator defines the list of roles. If the right role is missing, contact them. See For organization administrators.

> **Note:** A contact's email must be unique. If you see the message "Contact was not saved…", check that the email isn't used by another contact.

On your phone

Open the type group, open the options menu on the company card, and choose **Add contact**. The window opens full screen, and you continue as you would on a computer.

How to edit a company and change its logo

1. Open the company's row menu and choose **Edit** (the first item in the menu shown in the screenshot above), or click **Edit** in the **Company details** window.
2. In the **Edit company** window, update the details and the communications.
3. To upload or replace the company logo, click **Change logo** and choose an image.
4. Click **Save changes**.

> **Note:** If the details were saved but the logo upload failed, you'll see the message "Company details were saved, but the logo upload failed. Try uploading the logo again." Try uploading the logo again.

The logo appears on the company card and in the **Company details** window. You can choose any image file.

> **Tip:** To share a company with a colleague, click **Copy link** (on a phone: **Share**) at the top of the **Edit company** window. The link opens the Companies screen directly on that company. For more on copying a link, see Common tools.

On a phone: on the company card, open the options menu and choose **Edit**. The **Edit company** window opens full screen.

How to add a subcontractor

A subcontractor is always linked to a main contractor in the project.

1. On the **Companies** tab, find the contractor company.
2. Open the row menu (three dots) and choose **Add subcontractor**.
3. In the **Add subcontractor** window, check that the **Contractor company** is correct, and fill in **Company Number**, **Supplier name**, and **Supplier address**.
4. Click **Save subcontractor**.

The contractor's card shows the number of subcontractors. Expand the contractor to see them.

How to view company details

1. Click the company name.
2. The **Company details** window opens, with the logo, the company details, the contact methods, and the remarks.
3. From here you can click **Edit**, **Contacts**, or **Add contact**.

How to view a company's contacts

1. On the company's card or row, click **Contacts** (the number in parentheses is the number of contacts).
2. The company's contacts open. You can search in the **Search contacts** field, filter by **System user** / **Not a system user**, and switch between **Active** and **Inactive**.

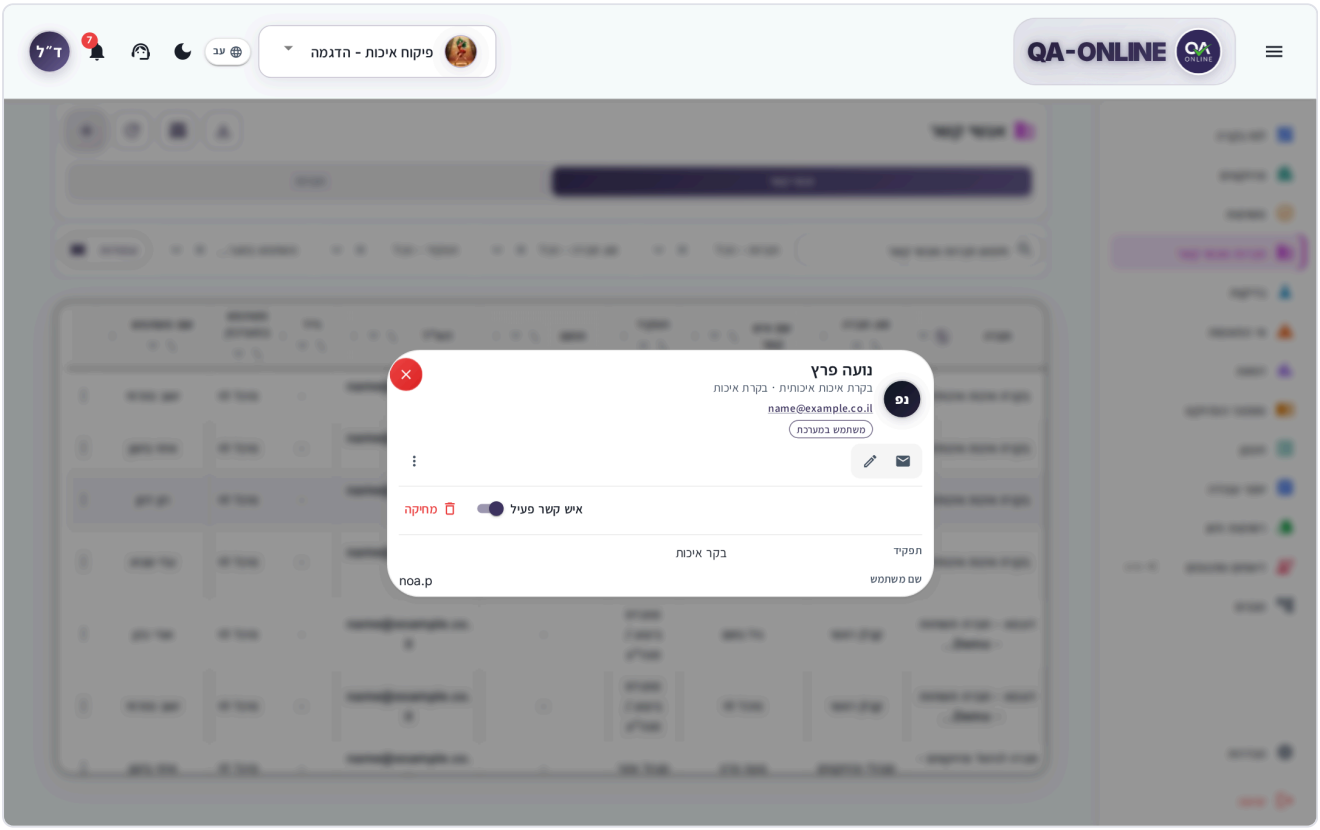
How to work with a contact

Click a contact (on the **Contacts** tab or in a company's contact list). The **Contact details** window opens.

Action	Where
Email	The envelope icon – opens a new email message
Call	The phone icon – dials the mobile number
Edit	The pencil icon – opens **Edit contact**
Associate discipline	Under **More actions** – choose the contact's professional disciplines
Communication means	Under **More actions** – update the contact's communications
Create user	Under **More actions** – appears only if the contact doesn't have a system user yet
Active contact	A switch – turning it off marks the contact as inactive
Delete	At the bottom of the window

Click **View company profile** to go to the contact's company.

The same actions are also available in the contact's row menu (three dots): **Edit**, **Associate discipline**, **Communications**, **Create user**, **Deactivate contact**, and **Delete**.



The Contact details window with the Email, Call, and Edit icons

If the phone or email doesn't open

In the phone app, if QA-Online can't open your phone or mail app, it copies the details to the clipboard and shows **Copied to clipboard**:

- For a phone number: "Phone number copied. Open your phone app and paste it to dial."
- For an email: "Email copied. Open your mail app and paste it into a new message."

If copying fails too, you'll see the message **Could not open link** – copy the address manually from the contact details.

How to create a user for a contact

For a contact to be able to sign in to QA-Online, create a user for them:

1. In the **Contact details** window, click **More actions** and choose **Create user** (or choose **Create user** in the row menu).
2. In the **User Creation** window, fill in **Username** and **Email**.
3. Choose a **Default language** (**Hebrew** or **English**).
4. Choose a **Permission group**. It determines what the user can see and do.
5. Optional: under **Signature**, drag in or choose an image of the user's signature.
6. Click **Create user**.

> **Tip:** This option appears only for contacts who don't have a user yet. It's available to anyone who can manage companies and contacts in the project. For more on managing users and permissions, see For organization administrators.

How to mark a company or contact as inactive

When a company has finished working on the project, it's better to mark it as inactive instead of deleting it. That way, the history is kept.

- **Company:** in the row menu, choose **Mark as inactive**. The company is hidden from the companies list.
- **Contact:** in the row menu, choose **Deactivate contact**, or turn off the **Active contact** switch in the details window. To bring the contact back, choose **Activate contact**.

> **Tip:** To reactivate a company, open it through a link – for example, **View company profile** on one of its contacts, or a link you copied earlier. The screen shows the company among the inactive companies, and there you choose **Mark as active** in the row menu.

How to delete

1. In the row menu, choose **Delete**.
2. In the confirmation window, click **Delete**.

Note: Deleting a company or subcontractor removes it from the project, along with all of its contacts in the project. The confirmation window shows how many contacts will be removed. This action can't be undone. The company itself stays in the QA-Online pool, and you can link it to the project again (see the frequently asked questions).

How to search and filter

- **Search:** type in the search field (**Search companies…** or **Search companies and contacts…**).
- **Companies:** filter by **Company type - All**.
- **Contacts:** filter by **Companies - All**, **Company type - All**, **Role - All**, and **System user - All**.
- In table view, you can filter by the values in each column (**Column filters**) and sort (**Sort by**).
- To return to the full list, click **Clear all filters**.

Tip: In table view on a computer, you can choose which columns to show with the **Columns** button, and drag column headers to change their order. On the **Companies** tab, the table shows only **Company name** and **Company type**; the other details appear on the cards and in the **Company details** window.

How to switch views

On a computer, you can switch between **Cards** and **Table** with the view button in the header. In card view, companies are grouped by company type.

How to export to Excel

1. Choose the tab you want to export: **Contacts** or **Companies**.
2. Click the export icon in the header (**Export to Excel**).
3. The file is prepared in the background and appears in the **Downloads** window. You can keep working in the meantime.

For more on downloading and previewing files, see Common tools.

On your phone

- The view is always cards.
- The add button appears as a floating button at the bottom of the screen.
- Tapping **Call** or **Email** opens your phone or mail app. If that doesn't work, see If the phone or email doesn't open.

> **Don't see this option?** The **Companies & Contacts** module is shown only to people who have permission to update and add suppliers, and anyone who sees it can also edit in it. Not everyone sees every module and action. Permissions are set by your role in the project. If a module or button is missing, contact your project manager or your organization's system administrator.

Frequently asked questions

The company already exists in another project. Do I need to enter it again? No. Start typing its name in the **Add company** window and choose it from **Similar companies in the system**. Its contacts are linked to the project automatically.

Why doesn't a contact appear in my list of signers or responsible people? Check that the contact is marked as active and has a suitable **Role** in the project. If the right role is missing, contact your system administrator.

What's the difference between a contact and a user? A contact is a record with a name and contact details. A user is a contact who also has a username and permission to sign in to QA-Online.

I deleted a company by mistake. Can I restore it? A deletion can't be undone, but you can link the company again: click **Add company**, type its name, and choose it from **Similar companies in the system**. Its contacts are linked to the project again, but you may need to set their roles again. Next time, use **Mark as inactive** instead.

See also

- For organization administrators – managing users, permission groups, and roles.
- Non-conformances – choosing the responsible contractor from the project's companies.
- Common tools – filtering, exporting, and copying a link.

Common tools

The tools that repeat across every module – lists, export, location, files and images, preview, links, and pinning.

The tools in this chapter look and work the same way in Checklists, Non-conformances, Tests, Work logs, Project Documents, MOMs, and the other modules. The module chapters link here instead of explaining them again. Read this chapter once, and come back to the relevant section when you need it.

Search, filter, and sort in lists

At the top of every list there's a bar with search and filter tools. The exact tools vary slightly between modules, but they behave the same way.

How to search and filter

1. Type in the **Search** box. The list filters as you type. To clear it, click the clear icon in the box (**Clear search**).
2. Choose values in the filters on the bar, such as status, type, location, or dates. Some lists also have a code range: **From Code** and **To Code**.
3. To filter by additional columns, click **Advanced Filters** (**Filter by table columns**).
4. Each active filter appears as a chip below the bar. Click the X on a chip to remove one filter, or click **Clear** / **Clear all** to remove them all.

If there are no results, you'll see a message such as **No results match your filters**. Clear some of the filters and try again.

> **Tip:** On a phone, the filters are hidden to save space. Click **Show Filters** to open them and **Hide Filters** to close them.

How to sort and filter by column

In table view, each column header has two small icons:

- **Sort** – each click cycles between ascending order, descending order, and no sorting. Date columns are sorted by the date itself.
- **Filter** – opens a list of the values in the column. Clear the checkmark next to values you don't want to see.

Long lists load gradually as you scroll. If loading fails, click **Retry** at the bottom of the list.

Views and columns

How to switch views

1. In the list header, click the **View** button.
2. Choose **Table** or **Cards**. Some modules also have a monthly calendar view.

Cards are easier to read on a phone and good for a quick overview. **Table** is better for comparing items, sorting, and selecting several items at once.

How to choose and arrange columns

1. In table view, click **Columns** (**Choose visible columns and reorder**).
2. In the **Table columns** window, select the columns you want to see and clear the rest. You can look for a column in the **Search columns** box.
3. To change the order, drag a column by its handle (**Drag to reorder**). You can also drag the column header in the table itself.
4. Click **Done**.

Columns marked **Always visible** or **Fixed position** can't be hidden or moved. To go back to the default, click **Show all columns** or **Reset columns**. QA-Online remembers your choice for each list.

Multi-select and bulk actions

In table view, you can select several items and run a single action on all of them.

1. Select the checkbox at the start of each row. To select all the displayed rows, select the checkbox in the table header.
2. An action bar appears with the number of selected items (for example, "3 selected").
3. Click the action you want.
4. To cancel the selection, click **Deselect all**.

The actions in the bar depend on the module and on your permissions:

Module	Example actions
All modules that support selection	**Pin**, **Unpin**, **Add Task**
Checklists	**Add File**, **Change step dates**, **Cancel Checklists**
Non-conformances	**Send**, **Reopen closed Non Conformances**
Work logs, Project Documents, MOMs	**Delete**
Tests	**Close order**, **Change order type**, **Switch user**, **Cancel order**

> **Tip:** When rows are selected, the export includes only those rows too (see Exporting to Excel and PDF reports).

Exporting to Excel and PDF reports

In most lists, you can export the items to a file. Inside a single item, you can generate a PDF report.

How to export a list

1. On the list screen, filter the items as needed. The export includes only the items that match the filters.
2. Click the export icon in the list header (for example, **Export checklists** or **Export lab orders**).
3. If you're asked, choose a document type (for example, **Checklist type**).
4. Choose a format. In Checklists, Non-conformances, Work logs, Project Documents, and MOMs, you choose **Excel** or **ZIP**. In Tests, the file is exported straight to Excel, with no format choice. On the Tasks and Projects screens, you choose **PDF** or **Excel**.
5. The file is prepared in the background and then opens in a preview (see Preparing large files in the background).

> **Tip:** To export only some of the items, select them in the table before you export. The export window shows how many rows are selected, and the file includes only those rows.

If there are no items to export, or export isn't set up in the project, the button is unavailable and a short explanation appears above it.

PDF report for an item

For many items, such as Checklists, Work logs, and Project Documents, you can generate a report from the details window:

- **Full Report** – a report with all the data, signatures, and files that were filled in.
- **Empty Report** – a blank form to print and fill in by hand in the field.

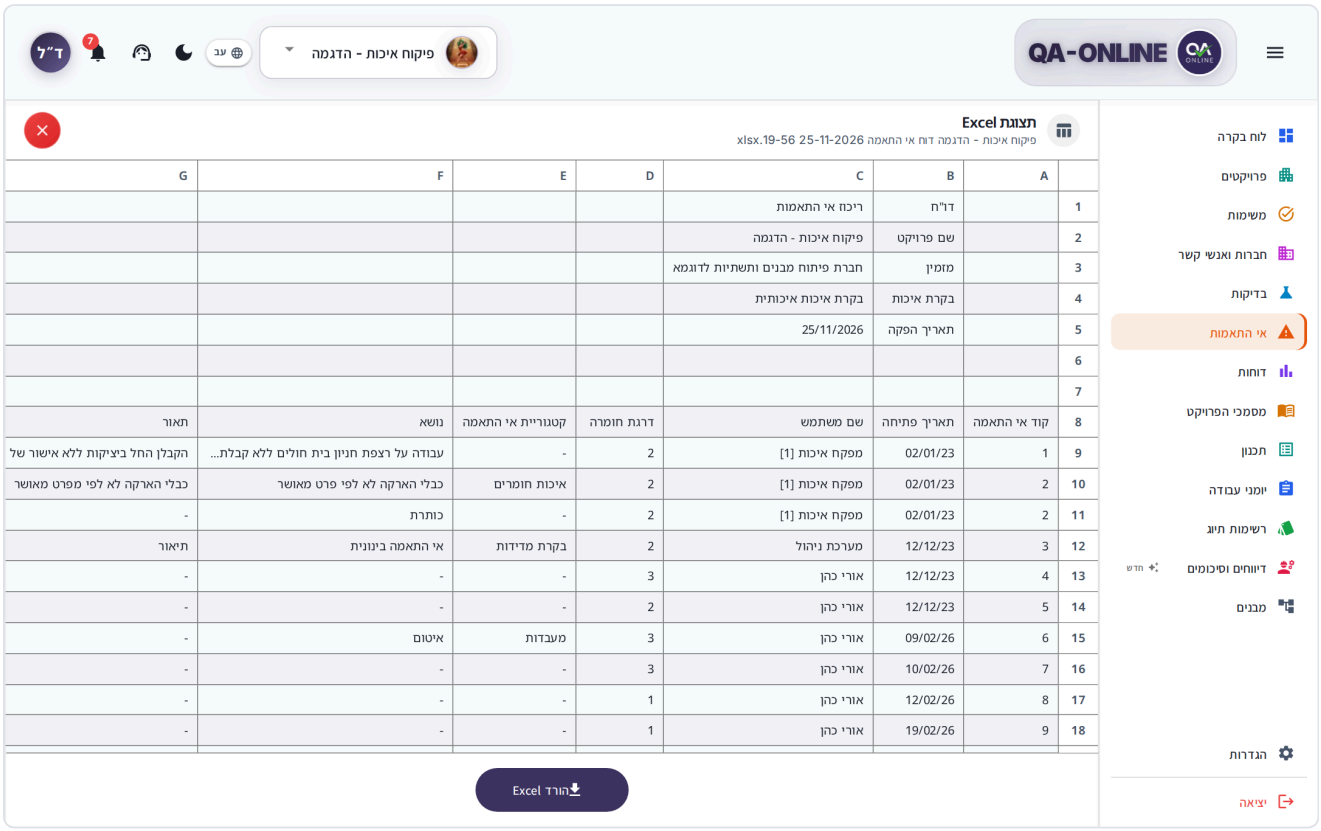
The report opens in a preview, and you can download it from there.

> **Tip:** Excel files from the Reports screen download directly, with no preview.

> **Don't see this option?** Not everyone sees every module and action. Permissions are set by your role in the project. If a module or button is missing, contact your project manager or your organization's system administrator.

Previewing and downloading files

When you download a file from QA-Online, such as an Excel export, a ZIP file, a PDF report, or an attachment, it opens in a preview first. That way, you can see what's inside before you download it.



Preview of an Excel file with a sheet selector

Which files can be previewed

File type	What you see
Excel	**Excel preview** – the sheet as a table. In a file with several sheets, choose one from the **Sheet** list
ZIP	**ZIP preview** – the folders and files in the archive
PDF	**PDF preview** – all the pages of the document
Image	**Image preview**
DWG / PLT	**DWG preview** / **PLT preview** – view the drawing
CSV and text files	**CSV preview** / **Text preview**

How to download from the preview

1. Check the file in the preview.

2. Click the download button at the top of the window, for example **Download Excel**, **Download PDF**, **Download ZIP**, or **Download image**.
3. The file is saved to your device.

To close without downloading, click the close icon or press Esc.

How to work with a ZIP file

1. In the ZIP preview, click a folder to open it. To go back to the top level, click **Main folder**.
2. To find a file, type its name in the **Search files…** field.
3. Click a file. Excel, CSV, PDF, images, drawings, and text files open right inside the window.
4. To download just this file, click **Download file**. To download the whole archive, click **Download ZIP**.

> **Tip:** A drawing (DWG) package that comes with its own fonts is marked **CAD package**. The fonts in the package are applied to the drawing so the text displays correctly.

When a file is large or won't open

- For large files, only the first part of the file, or the first rows and columns, is shown, with a matching message. Download the file to see all of it.
- If you see **File is too large to preview** or loading fails, click **Download without previewing**. The file downloads straight to your device.

Preparing large files in the background

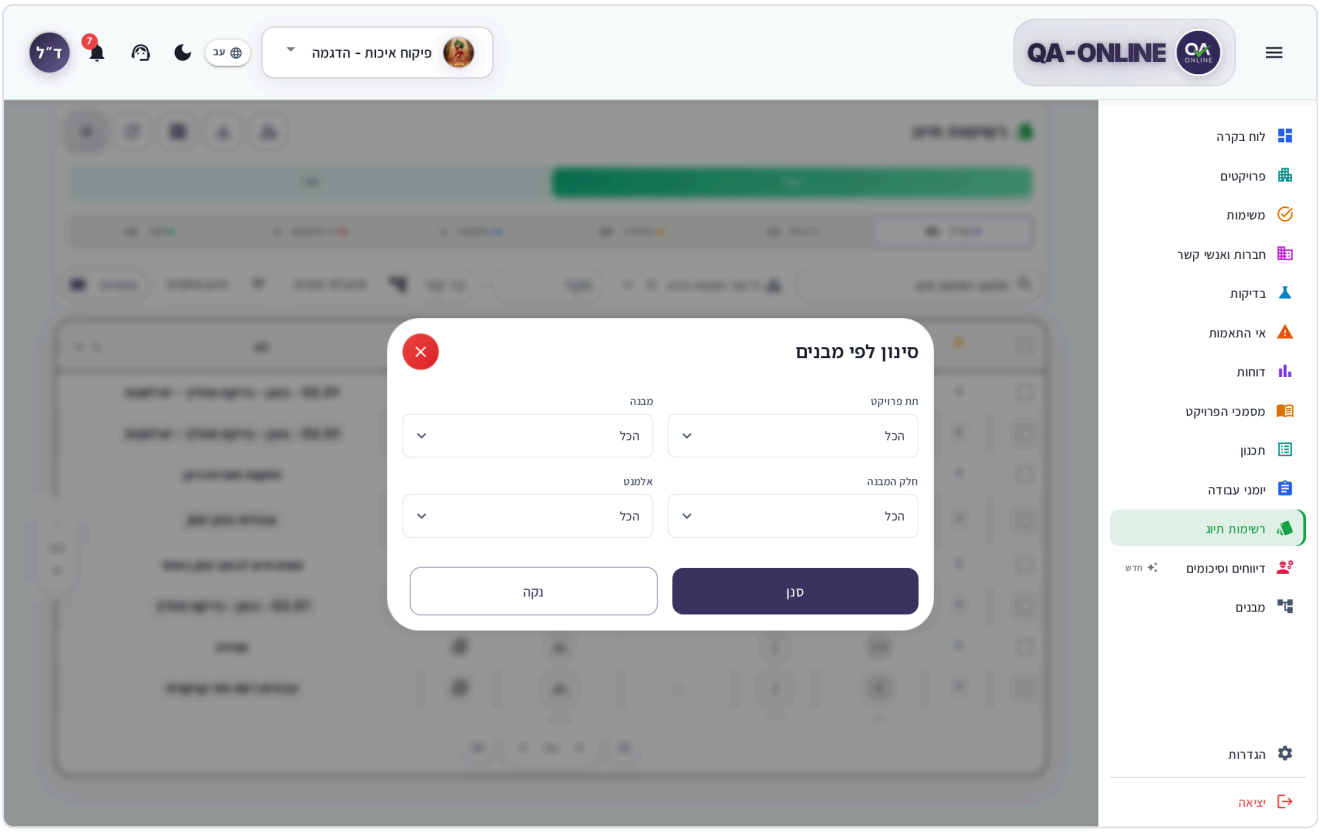
Exporting many items can take a while. While the file is being prepared:

1. You'll see the message **Preparing your file**, along with **You can close this and keep working. Progress stays in the dock.**
2. A small **Downloads** window appears at the bottom of the screen – in a corner on a computer, and as a bar across the screen on a phone. It shows the status of the file: **Preparing your file…**, **Starting download…**, **Saving to device…**, and finally **Saved**.
3. You can keep working in QA-Online in the meantime. To free up space, click **Minimize**.
4. When the file is ready, click **Preview** or **Download** in the **Downloads** window. To hide the window, click **Close**.

> **Note:** If you see **Couldn't download**, try again. If the problem keeps happening, open a support request.

Location picker

The location picker is how you choose the place in the project that an item belongs to: a building, a floor, an apartment, an element, and so on. It appears in create and edit forms and in list filters. The location structure comes from the Structures module, so the levels you see depend on how your project is set up.



The Select Location window with the structure levels and the current selection

How to choose a location in a checklist

1. In the form, click the location field. The **Select Location** window opens.
2. Choose a value at the first level, **Project partition**.
3. Continue to the next levels: **Structure Type**, **Structure**, **Sub Structure**, **Element Type**, and **Element**. Each level opens only after you choose the level above it.
4. Check the path you chose in the **Current selection** area.
5. Click **Save**. The location appears in the form field.

How to choose a location in other modules

In Non-conformances, Tests, Work logs, Project Documents, and MOMs, you choose the location in fields stacked one below the other:

1. In **Project partition**, click **Select Project Partition** and choose a value.
2. Continue in order: **Structure type**, **Structures**, **Sub-structure**, **Element type**, and **Elements**.
3. If needed, choose an exact section along the element (see Continuous elements).

> **Tip:** If a level has only one option, it's selected automatically and you can continue to the next level.

> **Note:** Changing a higher level clears the selections below it. For example, if you change the structure, you'll need to choose the elements again.

How to change or clear a location

- **Change** – click the location field again, or click **Edit** in the **Current selection** area, and change the level you want.
- **Clear** – click **Clear**. The whole selection is removed and you can start over.
- **Discard unsaved changes** – click **Cancel**.

Selecting multiple elements

In some forms, you can select more than one element at the same level. The number of selected elements is shown in the **Current selection** area (for example, "3 elements"). In lab orders, you can also add several separate locations with **Add location**.

Continuous elements (segments and sections)

For long elements, such as a road, a pipeline, or a wall, you can specify an exact stretch along the element:

- **In Checklists** – in the **Segments** area, choose **From segment** and **To segment**. If needed, also fill in **From vertical (RM)**, **To vertical (RM)**, and **Direction**. To specify another stretch, click **Add section**. To remove a stretch, click **Remove section**.
- **In other modules** – choose **From Segment**, **To Segment**, and **Side**.

> **Tip:** After you choose **From segment**, the **To segment** list shows only the segments that come after it.

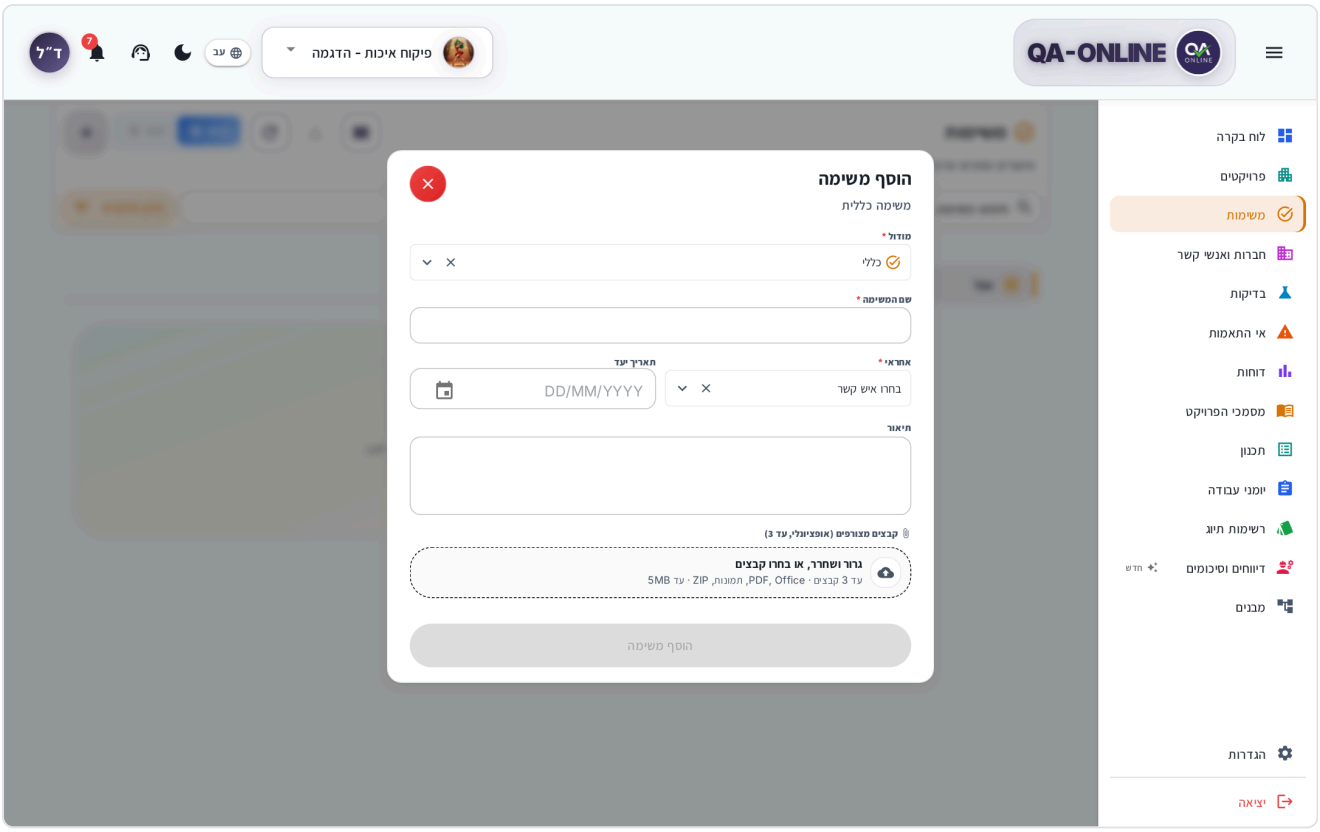
If you see the message **No segments are defined for this element.**, segments haven't been defined yet in the project's structure. Contact your project manager.

Filtering lists by location

In item lists, you can filter by location. Choose one level after another, or leave **All** to skip filtering at a given level.

Attaching files and images

You can attach files to most items in QA-Online: steps in Checklists, Non-conformances, rows in Work logs and Project Documents, tasks, support requests, and more.



The file upload area with a list of selected files

How to attach a file

1. On the item you want, click **Attach file** (or click the upload area in the files section).
2. Drag files to the area that says **Drag files here or click to select**, or click it and choose files from your device.
3. The files appear under **Selected Files**. Each file shows its name and size, and images also show a thumbnail.
4. You can add a **Caption (Optional)**. When you choose several files together, the caption applies to all of them.
5. Click **Upload Files**.

> **Tip:** Before you upload, you can mark up and highlight details in an image. Click the pencil icon (**Edit image**) next to the image. See Image editor.

To remove a file you selected before uploading, click the trash icon next to it.

Taking a photo from your phone

On a phone, tapping the upload area opens your device's picker. On most phones, you can also choose the camera there and take a new photo. The photo you take is added to the file list like any other file.

> **Tip:** Large images are resized automatically before upload, so uploading stays fast even on a mobile network.

File types and size

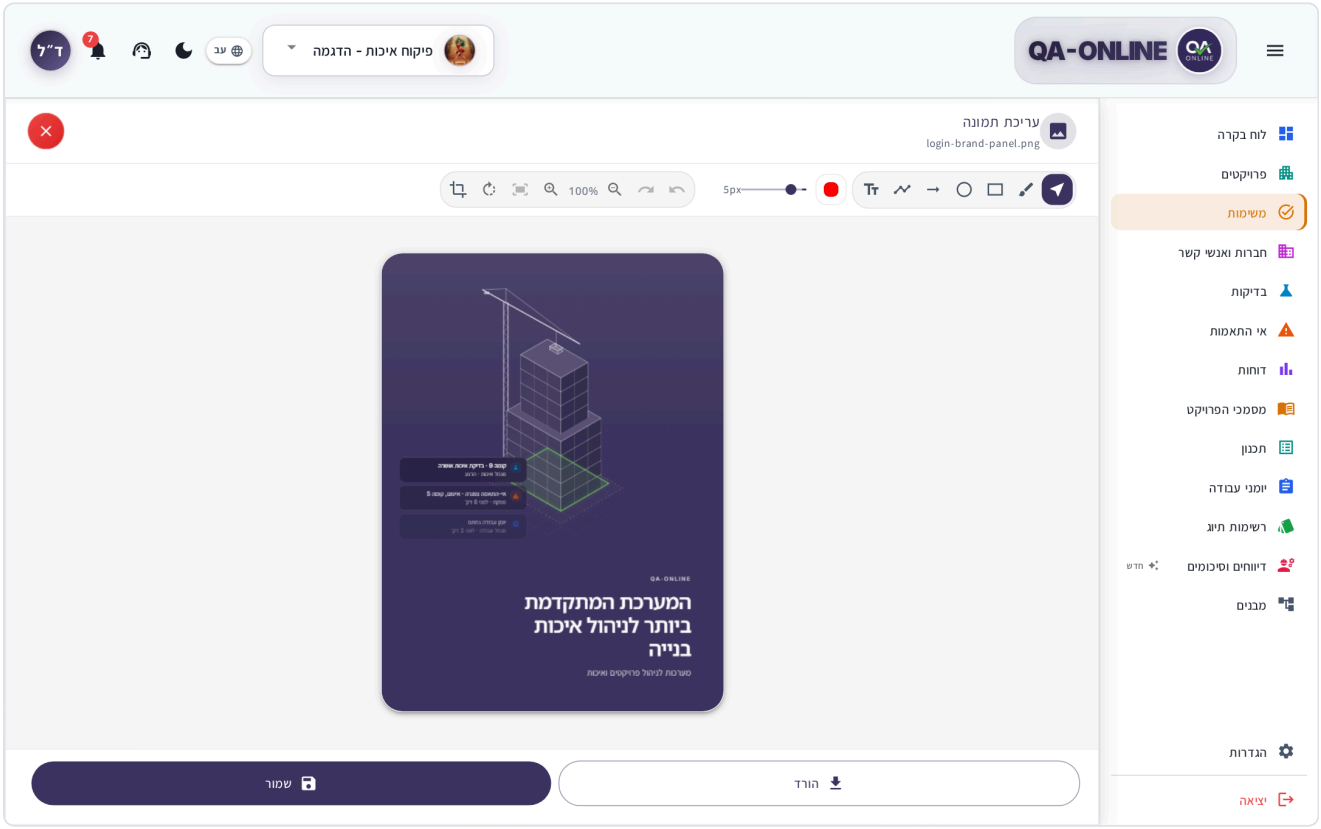
- **In the general upload area** – PDF, Word, Excel, PowerPoint, images (JPG, PNG, GIF), and videos (MP4, MOV, AVI).
- **In Checklists, Work logs, Project Documents, and MOMs** – up to 50MB per file.
- **In tasks and support requests** – up to 3 files, up to 5MB each. If a file is too large, you'll see the message **File is too large (max 5MB)**.
- If the file type isn't supported, you'll see the message **Unsupported file type**. Save the file in another format and try again.

> **Note:** Uploading large files can take a while. Don't close the window until the upload finishes.

> **Don't see this option?** If you see the message **File uploads are unavailable in this field.**, the field isn't set up to accept files. If the **Attach file** button is missing, you don't have permission to edit the item – contact your project manager.

Image editor

The image editor lets you mark up an image – with arrows, circles, text, and freehand drawing – and crop or rotate it. That way, you can show exactly where the defect is.



The Edit Image window with the toolbar

How to open the editor

Click the pencil icon **Edit image** next to an image. The icon appears before upload, and also on images already attached to an item (if you have permission to edit). The **Edit Image** window opens.

Editor tools

Tool	What you use it for	Keyboard shortcut
Select	Select and move an existing mark	V
Brush	Freehand drawing	B
Rectangle	Mark an area with a rectangle	R
Circle	Circle a detail	C
Arrow	Point to a spot	A
Line	A straight line	L
Text	Add a written note	T

More actions on the toolbar:

- **Choose color** and **Brush size** – the color and thickness of the next mark.
- **Undo** and **Redo** – undo the last action or bring it back (Ctrl+Z / Ctrl+Y).
- **Zoom in**, **Zoom out**, **Reset zoom**, and **Fit** – control the view. On a phone, you can also pinch to zoom in.
- **Rotate image** – rotate the whole image.
- **Crop** – select the area you want and click **Apply crop** (Enter), or **Cancel crop (Esc)**.

When a mark is selected, the actions **Delete**, **Duplicate**, **Bring to front**, and **Rotate selection** also appear. You can also delete a mark with the Delete key and move it with the arrow keys.

How to add text

1. Choose the **Text** tool.
2. Click the spot on the image where you want the note.
3. Type in the **Enter text...** box.
4. Click **Add**.

How to save

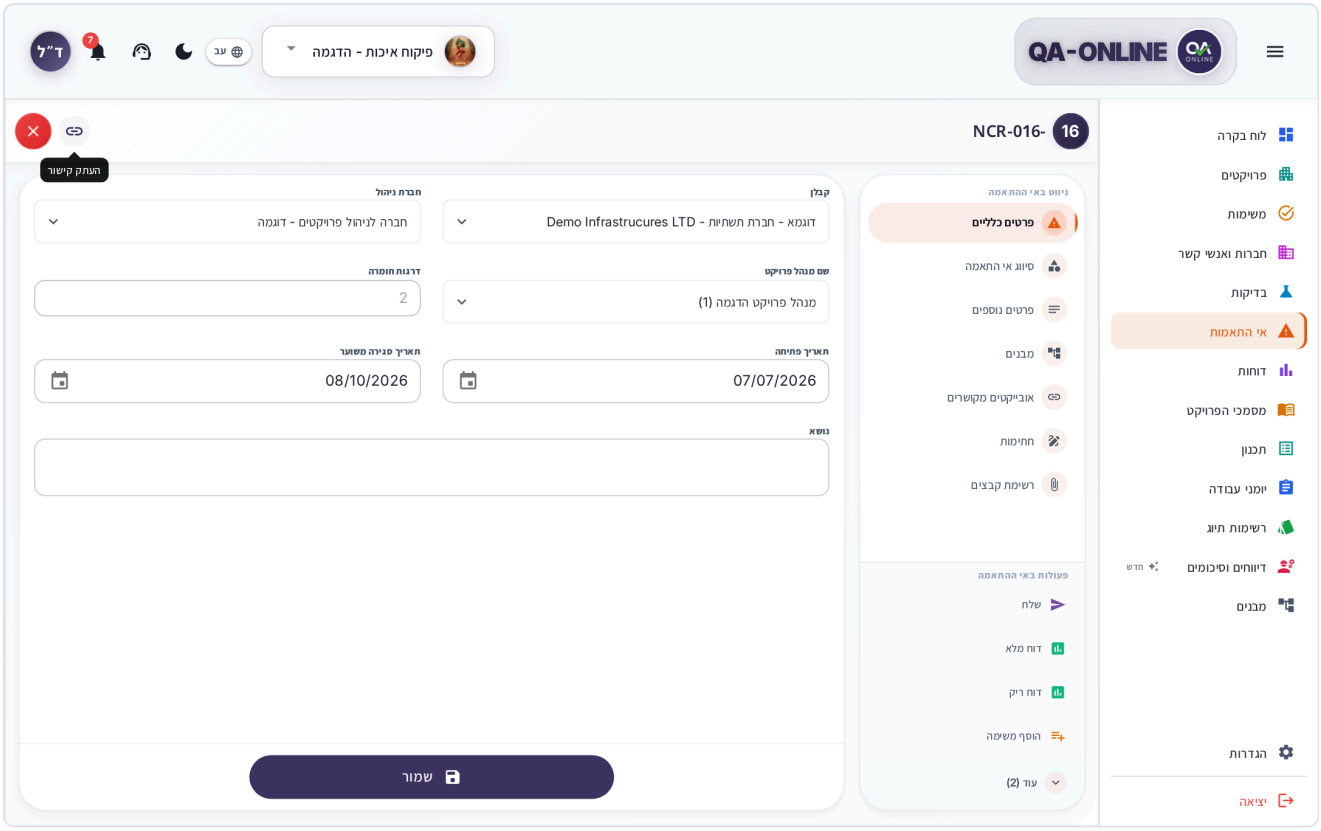
1. Click **Save**. You'll see the message **Image saved successfully**.
2. To save a copy to your device, click **Download**.

> **Note:** When you edit an image that's already attached to an item, **Save** replaces the original image with the edited version. If you also want to keep the original, download it before you edit.

If you close the window before saving, you'll be asked **Discard edits?**. Click **Keep editing** to go back to editing, or **Discard** to leave without saving.

Copying a link and sharing

You can send a colleague a direct link to an item: a checklist, a step, a Non-conformance, a work log, a document, a MOM, a test, a plan, a support request, and more.



The Copy link button in the header of the details window

How to copy a link

1. Open the item.
2. In the header of the details window, click the chain icon (**Copy link**).
3. You'll see the message **Link copied**.
4. Paste the link into a message, an email, or WhatsApp.

On a phone and a tablet, the button is called **Share**. Tapping it opens your device's share sheet, where you choose an app and a contact.

What happens when someone opens the link

- The link opens the item directly, even if the person who receives it currently has a different project open. QA-Online switches to the right project automatically.
- Anyone who isn't signed in is asked to sign in first, and the item opens after they do.
- Anyone without access to the project sees the message **You don't have access to this project**.

- In WhatsApp and similar apps, the link appears as a preview card with the module name and the item type. The item's own details, such as the project name or the item's subject, aren't shown in the card.

> **Tip:** If you see the message **Could not copy link**, copy the address from your browser's address bar.

Pinning and recent activity

How to pin an item

Pinning keeps important items at the top of the list so you can find them quickly. You can pin items in Checklists, Non-conformances, Tests, Work logs, Project Documents, and MOMs.

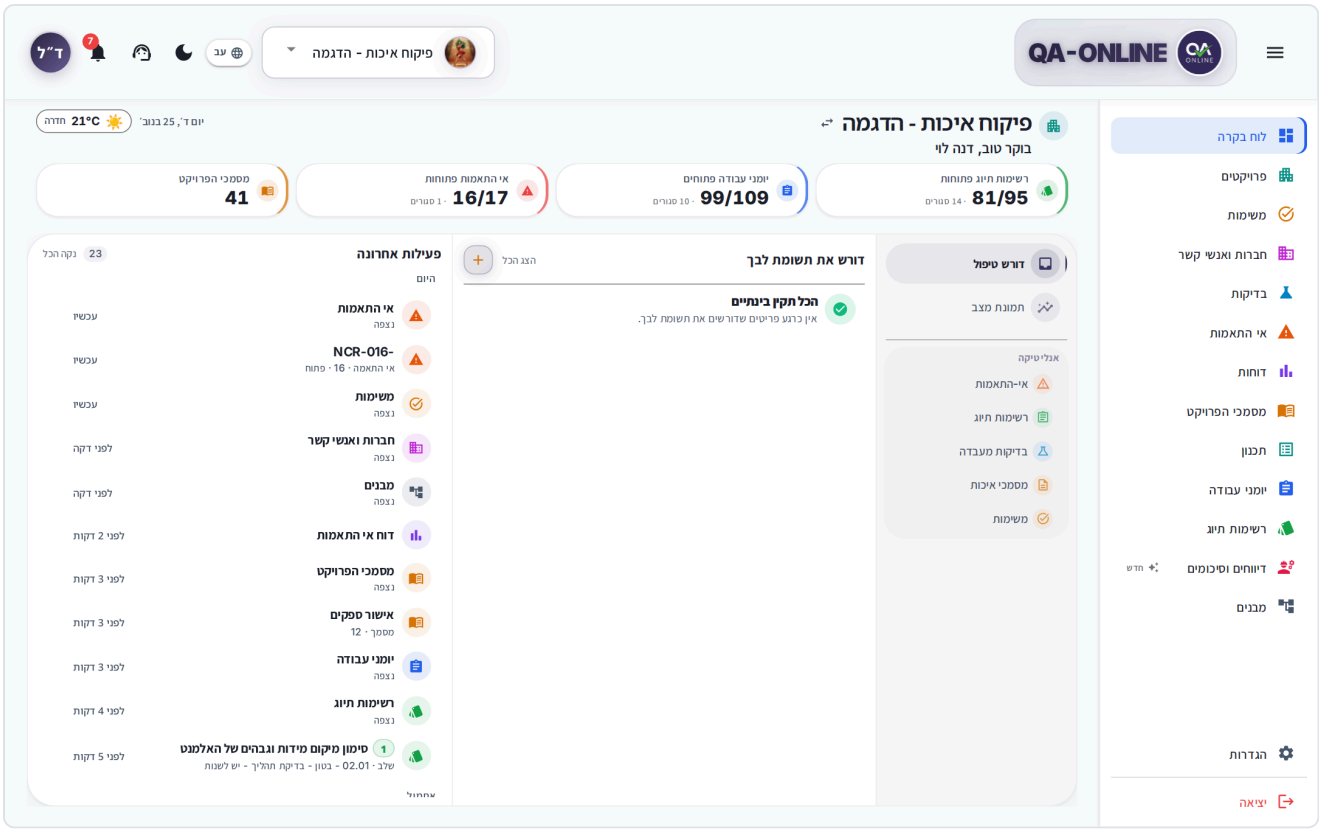
1. In the list, open the item's actions menu and click **Pin** (for example, **Pin Non-Conformance**). In table view, you can also click the icon in the **Pin** column.
2. The item appears in the pinned area at the top of the list.
3. To undo it, click **Unpin**.

> **Tip:** To pin several items at once, select them in the table and click **Pin** in the action bar (see Multi-select and bulk actions).

Pins are personal: only you see them, and they're saved separately for each project. To mark a project as a favorite, see Dashboard and projects.

Recent activity

On the Dashboard, the **Recent Activity** area (**Pick up where you left off**) shows the items and modules you opened most recently in the active project. They're grouped by **Today**, **Yesterday**, **This week**, and **Earlier**. Items you've pinned appear at the top, under **Pinned**.



The Recent Activity area on the Dashboard

- **Open** – click a card to go back to exactly that item or step.
- **Pin** – on a computer, click the pin icon on the card. On a phone, tap the three-dot icon on the card and choose **Pin**. To undo it, click the pin again or choose **Unpin**.
- **Remove** – on a computer, click the X on the card. On a phone, choose **Remove** in the card menu. You'll see the message **Removed from recent activity**. Click **Undo** if you removed it by mistake.
- **Clear** – click **Clear all** in the area header (on a phone: **Clear**). In the **Clear recent activity?** window, click **Clear all**.
- **More items** – on a computer, the full list scrolls inside the area. On a phone, only the first items are shown. Click **Show all** to see the rest, and **Less** to collapse them.

> **Note:** Clearing deletes only the recent activity list. Your Checklists, Work logs, and other data aren't affected.

If an item was deleted or you no longer have access to it, you'll see the message **This item is no longer available.** Click **Remove from list**.

Voice typing

QA-Online doesn't have a microphone button inside text fields. To dictate text, use your device's dictation:

1. Click a text field, such as **Description** or **Remarks**.
2. On your phone's keyboard, tap the microphone icon.

3. Speak. The text is typed into the field.
4. Check the text and correct it before you save.

> **Tip:** On a computer, you can use your operating system's dictation (Windows or macOS) in the same way.

Frequently asked questions

I edited an image that was already attached. Is the original kept? No. **Save** replaces the original image. To keep the original too, download it before you edit.

The export is taking a long time. Can I keep working? Yes. Close the **Preparing your file** message and keep working. The file's status appears in the **Downloads** window at the bottom of the screen.

I hid some columns and now I'm missing information. How do I bring them back? Click **Columns**, then **Show all columns** or **Reset columns**.

I sent a link to a colleague and they see "You don't have access to this project". What should I do? Your colleague isn't assigned to the project. Ask the project manager to add them.

I don't see the "Structure type" level in the location picker. The levels depend on the project's structure. If a level isn't defined in the project, it isn't shown.

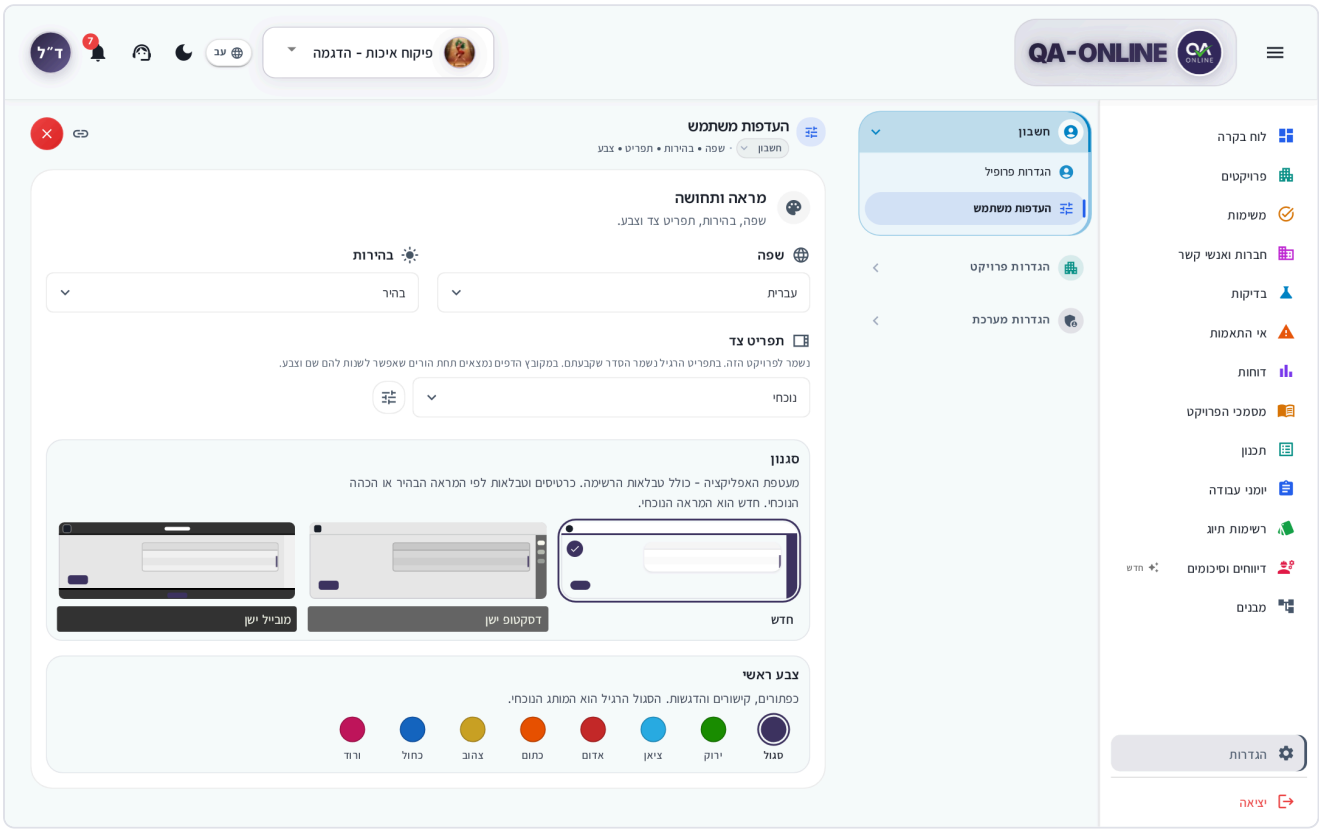
See also

- Structures – where the location levels come from.
- Tasks and approvals – tasks you create from the multi-select bar.
- Using your phone and tablet – photos, sharing, and dictation in the field.
- Support and help – when a download or upload keeps failing.

Settings

Tailor QA-Online to you – your personal details, language, appearance, side menu, and project preferences.

Every user can update their profile and personal preferences here. Administrators with the right permission also see the project settings and the organization's system settings here – these are explained in the chapter For organization administrators.



The Settings screen on a computer, with the navigation menu and Preferences open

How to open Settings

There are two ways:

- Click your profile picture (or your initials) in the corner of the top header and choose **Settings**.
- At the bottom of the side menu, click **Settings**.

To close Settings, click the red X in the corner of the screen. You'll return to the screen where you were working.

What you see on a computer

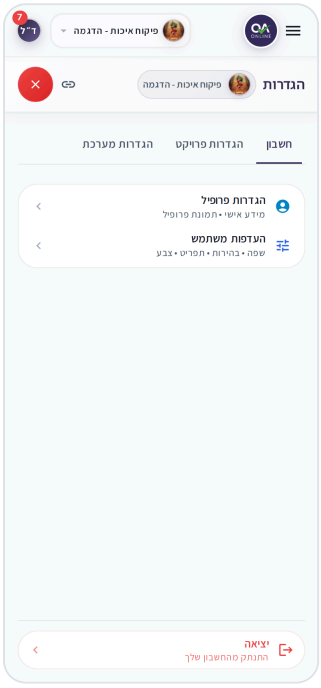
- **On the side** – a navigation menu divided into groups: **Account** and **Project Settings**, and for authorized administrators also **System Settings**. Clicking a group opens it and closes the others.

- **At the top of the open section** – its title and a short breadcrumb (for example, **Account**). Clicking one of the names in the breadcrumb lets you jump to another section in the same group.
- **Next to the X** – a refresh icon that reloads the data in the open section.

What you see on a phone

Settings opens on a main screen with a list of sections. Tap a section to open it, and tap the arrow to go back. All the personal sections are grouped under **Account**. Authorized administrators see the tabs **Account** | **Project Settings** | **System Settings** at the top of the screen. At the bottom of the main screen, there's also a **Logout** button.

> **Tip:** This view also appears on a computer when the browser window is narrow.



The main Settings screen on a phone

What's available to every user

Section	What's in it	Who sees it
Profile Settings	Name, profile picture, account deletion request	All users
Preferences	Language, brightness, side menu, style, and color	All users
Preferences (on a computer, under **Project Settings**; on a phone, **Account** → **Project Settings**)	Default project and location	All users

Section	What's in it	Who sees it
Checklists Preferences	Confirmation dialogs and quick action display in Checklists	All users, on a phone and tablet only (under **Account**)
The rest of the **Project Settings** and **System Settings**	Project details, module settings, users, and permissions	Authorized administrators – see For organization administrators

> **Don't see this option?** Not everyone sees every module and action. Permissions are set by your role in the project. If a module or button is missing, contact your project manager or your organization's system administrator.

How to update your profile

1. Open **Settings** → **Account** → **Profile Settings**.
2. In the **Personal Information** area, update your **First Name** and **Last Name**.
3. There's no save button – your change is saved automatically. Next to the fields, you'll see **Saving…** and then **Saved**.

If you see **Couldn't save**, check your connection and click the message to try again.

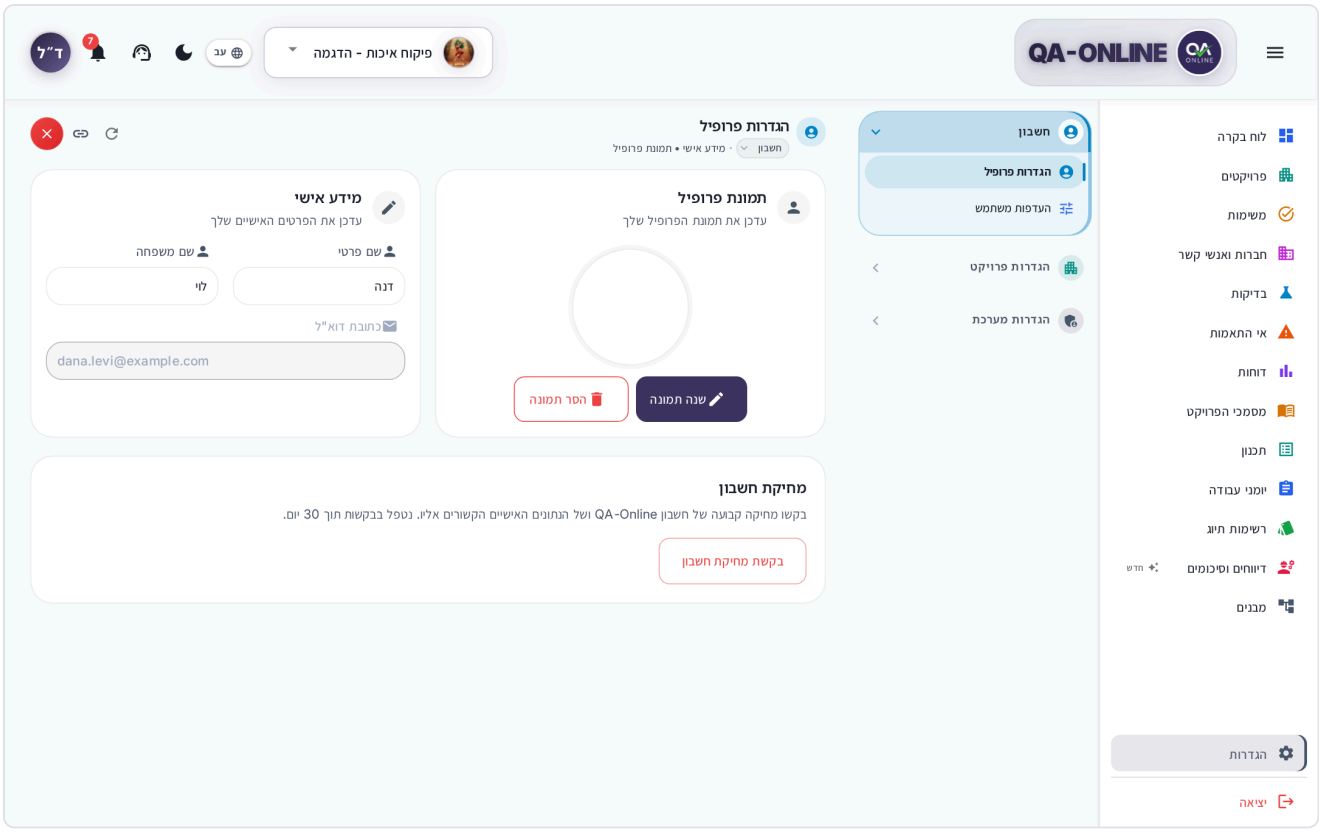
> **Note:** You can't change your **Email Address** here. Your organization's system administrator can update it on the user management screen. If no one in your organization can do that, open a support request.

How to change your profile photo

1. In the **Profile Avatar** area, click **Upload photo** (if you already have a photo, **Change photo**).
2. Choose a PNG or JPEG file from your computer or phone.
3. The photo updates right away and appears in the top header and in the user menu.

To delete the photo, click **Remove photo**. Your initials are shown in its place.

> **Tip:** On a phone, the profile is split into two tabs: **Personal Information** and **Profile Avatar**.



Profile Settings – profile avatar and personal information

How to change your password

You can't change your password from Settings while you're signed in. There are two ways to get a new password:

- **On your own** – sign out, and on the sign-in screen choose the password reset option. The full explanation is in Signing in and your account.
- **Through your organization's system administrator** – they can send you a password reset from the user management screen (For organization administrators).

> **Tip:** Administrators who see **System Settings** can change their own password under **Users & Permissions → Users Settings**, using their current password.

Digital signature

Your saved signature is used to sign steps in Checklists, Work logs, and other documents. **Settings doesn't let you upload a signature yourself.** A signature gets into QA-Online in one of two ways:

- **Your organization's system administrator** uploads it under **System Settings → Users**: in the user's row, they click the three-dot icon (**Actions**) and choose **Upload signature**. Next to each user, you'll see **Has signature** or **No signature**.
- **When creating a new user** from a contact, you can attach a signature image in the **Signature** field. See Companies and contacts.

A signature is an image file (for example, PNG or JPG). We recommend a clear signature in dark ink on a white background.

If you don't have a saved signature, the **Add row** button in tables that require a signature is disabled, and when you hover over it, it explains that you don't have a signature in the system. For what to do in that case, see Work logs – what to do when you have no signature.

How to change the language

1. Open **Settings** → **Account** → **Preferences**.
2. In the **Language** area, choose one of: Hebrew, English, Arabic, Spanish, or Russian.

The change applies right away and is saved to your account, including when you sign in from another device. You can also switch languages from the language selector in the top header.

What changes when you switch languages:

- **Screen direction.** In Hebrew and Arabic, the screen runs right to left (the side menu is on the right). In English, Spanish, and Russian, the screen runs left to right (the menu is on the left).
- **Numerals.** In Arabic, numbers and dates are shown in Arabic-Indic numerals.
- **Project data.** Interface labels are fully translated. Values that were defined in your organization – for example, checklist type names or custom fields – may appear in Hebrew or English.

How to switch to dark mode

1. In **Preferences**, in the **Brightness** area, choose **Light** or **Dark**.
2. The change applies right away.

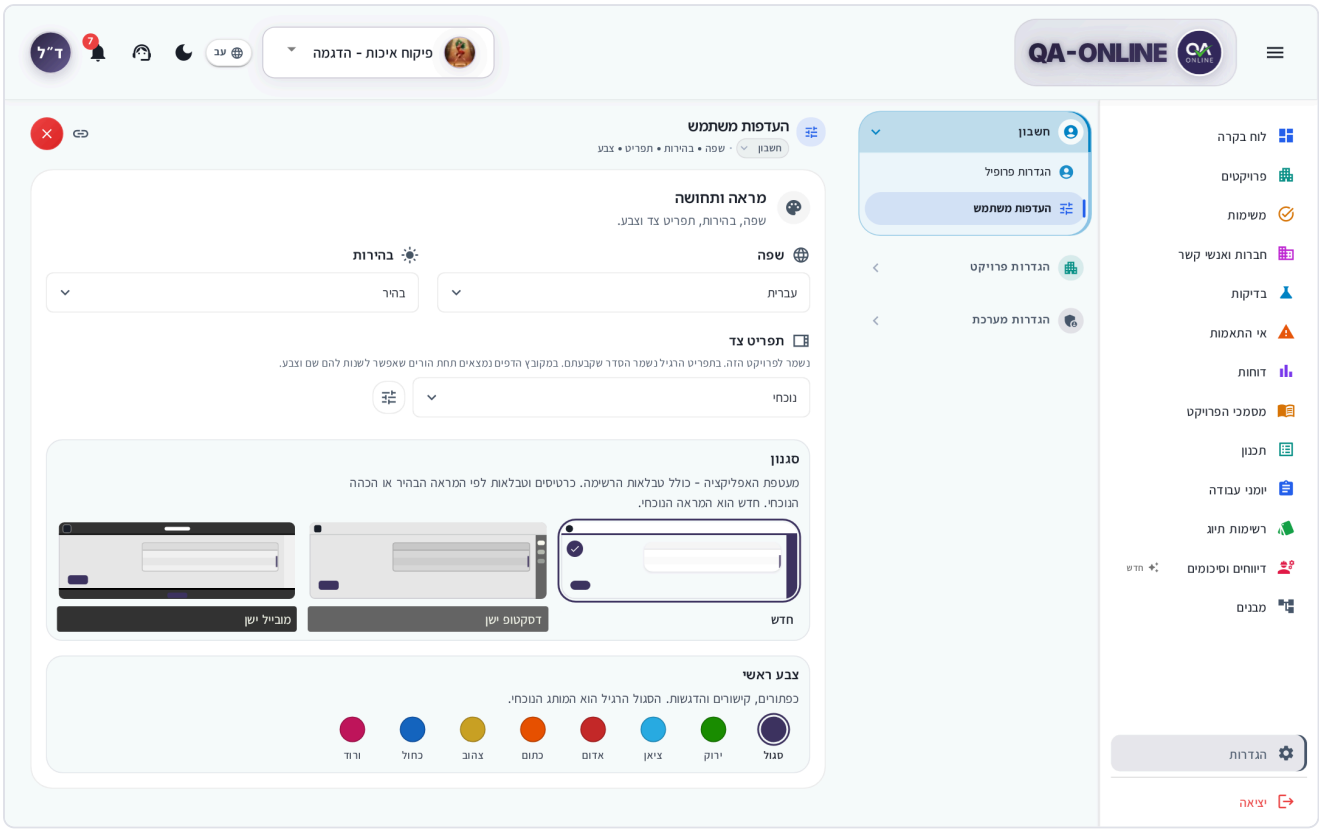
You can also switch by clicking the sun / moon icon in the top header. On a phone, the icon is inside the user menu.

How to change style and color

In **Preferences**, below the menu area:

- **Style** – **New** (the current look), **Old desktop**, or **Old mobile**. The older styles suit anyone who's used to the look of previous versions.
- **Primary color** – the color of buttons, links, and highlights: **Purple** (the default), **Green**, **Cyan**, **Red**, **Orange**, **Yellow**, **Blue**, or **Pink**.

Changes apply right away and are saved to your account.



Preferences – language, brightness, side menu, style, and primary color

How to choose the side menu layout

1. In **Preferences**, in the **Side menu** area, choose:
   - **Current** – a single list of all the modules. This is the default.
   - **Grouped** – the modules are arranged in groups (for example, **Project**, **Planning**, **Operations**, and **Control**).
2. The menu updates right away.

> **Important:** The menu layout and your customizations are saved **separately for each project**. If you switch to another project and the menu looks different, that's expected.

The differences between the two menu types are explained in Getting to know the screen and navigation.

How to customize the menu

1. In **Preferences**, in the **Side menu** area, click the customize icon (**Customize menu**) next to the selection.
2. The **Customize menu** window opens.
3. Make the changes you want (details below).
4. Close the window. **There's no save button** – every change is saved right away.

In the Current menu

- **Reorder** – drag an item to another place (on a phone, **Move up** / **Move down**).
- **Hide an item** – click **Hide from menu**. To bring it back, click **Show in menu**.

In the Grouped menu

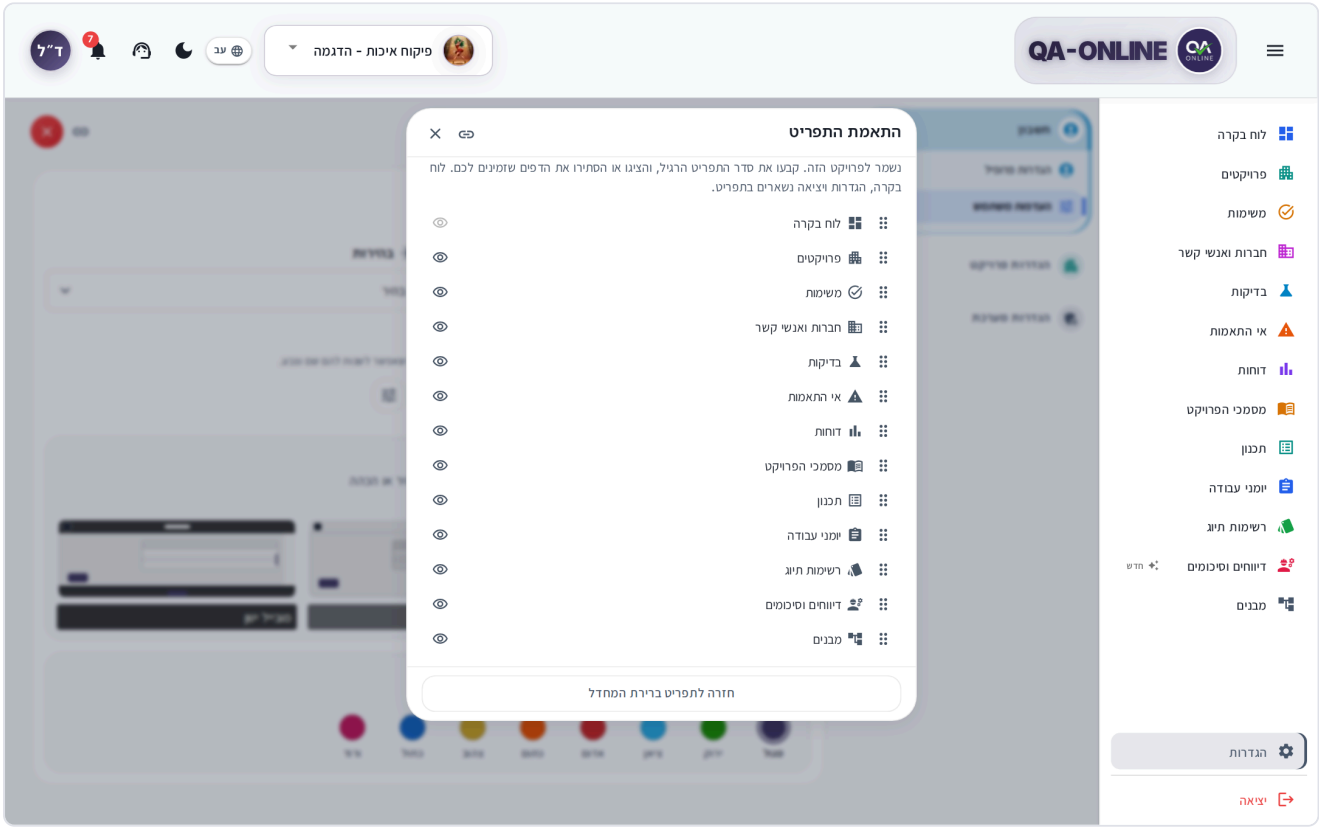
- **Groups** – change the **Group name**, **Choose icon**, and **Choose color**. For a new group, click **Add group**; to delete one, click **Remove group**. At least one group must remain.
- **Modules** – move a module to another group (**Move to group**), change the order, or hide it. You can't change the module names themselves.

Restoring the default

Click **Use the default menu** at the bottom of the window.

> **Note:** **Dashboard**, **Settings**, and **Logout** always stay in the menu. Next to items like these, you'll see **This page stays in the menu**.

> **Tip:** Hiding only tidies the menu. It doesn't change permissions – you can still reach the module from a link.



The Customize menu window in the Grouped menu

How to choose a default project and location

1. Open **Settings** → **Project Settings** → **Preferences** (on a phone: **Account** → **Project Settings**).
2. In **Default Project**, choose the project that opens automatically when you sign in.
3. In **Location**, choose the project's city. It's used for the weather forecast on the Dashboard and in documents.

Changes are saved right away. The location is saved for the project that's currently selected.

How to set confirmation dialogs in Checklists

When you save, sign, or reopen a step in a checklist, QA-Online asks whether you're sure. You can choose when the question appears:

1. On a phone or tablet, open **Settings** → **Account** → **Checklists Preferences**.
2. In the **Checklists Actions Approval** area, select or clear:
   - **Show confirmation popup on Save Step**
   - **Show confirmation popup on Sign/Close Step**
   - **Show confirmation popup when reopening a closed step**
3. In the **Quick Actions Display** area, choose separately for **Mobile Display** and **Desktop Display** whether the actions appear as **Individual Buttons** or in a **Three-dots Menu**.

> **Tip:** If you previously selected **Don't show this message again** in a confirmation dialog, you can turn it back on here.

> **Note:** On a computer with a wide screen, this section doesn't appear in the Settings menu. The preferences are saved to your account, so you can change them on your phone and they'll apply on your computer too.

For details on working with Checklists, see the chapter Checklists.

Notifications

Settings has no screen for configuring notifications, and you can't turn notifications off or choose notification types. Notifications appear in the bell in the top header and in your tasks – see Getting to know the screen and navigation and Tasks.

Project settings (for administrators)

Authorized administrators also see, in the **Project Settings** group, **General details**, **Project settings**, **Project report**, **Logo & Banner**, and settings for each module (Checklists, Non-conformances, Project Documents, test orders, and more). These are explained in the chapter For organization administrators.

> **Important:** Project settings apply to the project that's currently selected in the Project selector. Make sure you've selected the right project before you change anything.

Terms of use

The first time you sign in, and every time the terms are updated, you'll be asked to accept them. Settings has no place to review them again. The explanation is in Signing in and your account.

How to request account deletion

1. Open **Settings** → **Account** → **Profile Settings**.
2. At the bottom of the screen, in the **Delete account** area, click **Request account deletion**.
3. In the **Delete your account?** window, click **Send deletion request**.

Your request is handled within 30 days, and you'll receive an email when the deletion is complete.

> **Note:** After the request is verified, your account and the personal data related to it are deleted, and this can't be undone.

Frequently asked questions

I changed the language and the whole screen flipped. Is that normal? Yes. In Hebrew and Arabic, the screen runs right to left, and in the other languages it runs left to right.

I changed the menu, and in another project it went back to the way it was. That's expected. The menu layout and customizations are saved separately for each project.

How do I upload a signature? You can't upload a signature yourself. Ask your organization's system administrator to upload it from the user management screen (see Digital signature).

I hid a module from the menu and now I can't find it. Open **Preferences** → **Customize menu** and click **Show in menu** next to the module, or **Use the default menu**.

In Project Settings, I see only "Preferences". That's expected. The rest of the project settings and the system settings are available only to authorized administrators. Contact your organization's system administrator if you need access.

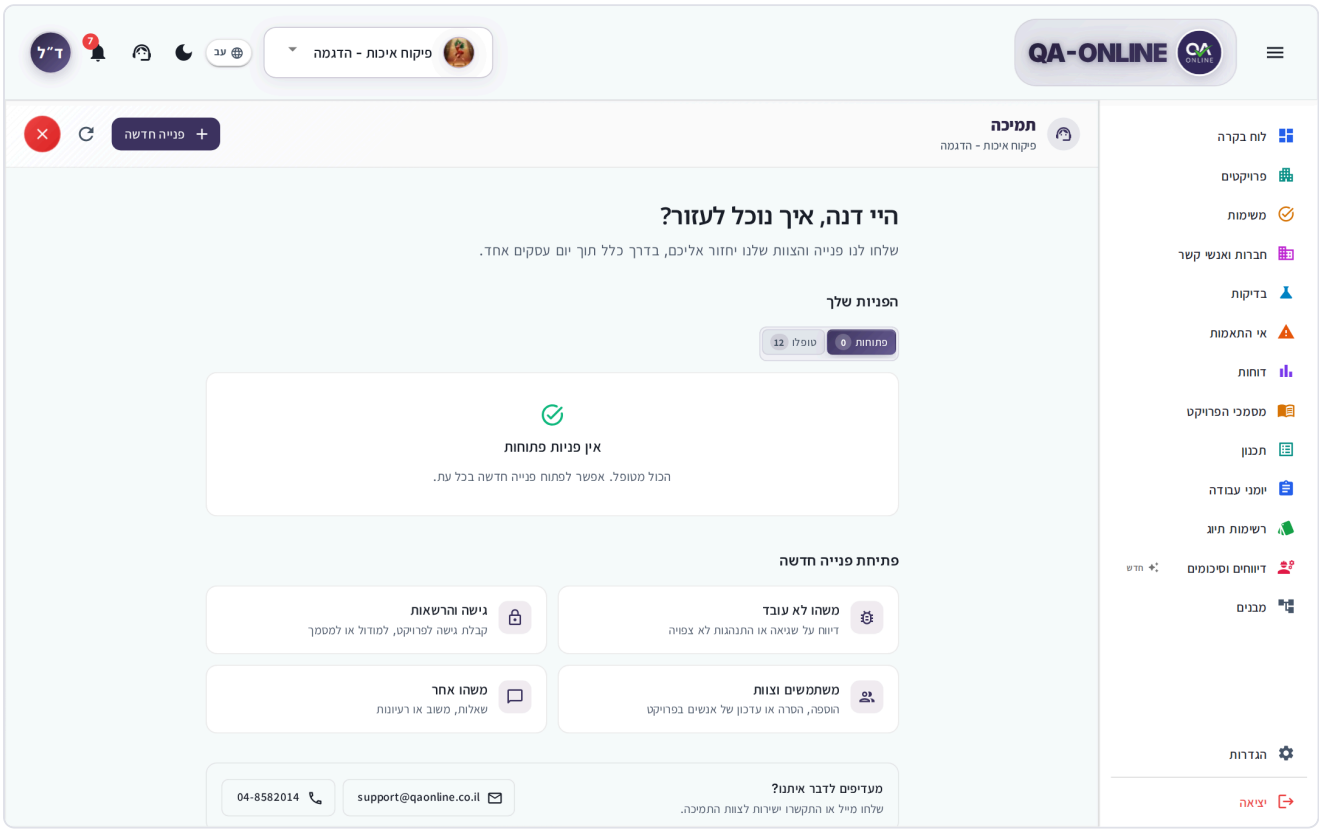
See also

- For organization administrators – project settings, user management, and uploading signatures.
- Getting to know the screen and navigation – the side menu, the top header, and notifications.
- Signing in and your account – password reset and terms of use.
- Support Center – when something in Settings isn't working.

Support and help

Contact the QA-Online support team and follow up on their replies – all in one place, inside the system.

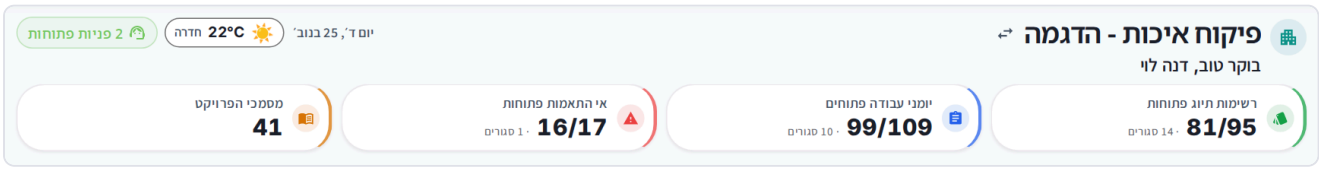
Ran into a problem, missing a permission, need to add a user, or have a question? Open a support request. The team usually replies within one business day, and the reply appears in the **Support Center** inside the system.



The Support Center – greeting, your requests, and topics for a new request

How to open the Support Center

- **On a computer** – click the agent icon (**Support Center**) in the top bar.
- **On a phone** – tap your profile picture and choose **Support Center** from the menu.
- **From the Dashboard** – if you have open requests, a badge such as **2 open tickets** appears in the Dashboard header (on a phone, an icon and a number). Click it to open the Support Center.



The open tickets badge in the Dashboard header

There are also shortcuts from screens where something didn't work – see Opening a request from an error or access restriction.

What you see in the Support Center

Area	What's in it
How can we help?	A short greeting and a note about response times.
Your requests	The requests you've opened, in two tabs: **Active** and **Resolved**. A request with a new reply is marked **New reply** and appears first.
Start a new request	Topic cards that open a form with the category already filled in.
Prefer to talk to us?	The support team's email address and phone number. Click one to open your email app or phone dialer.

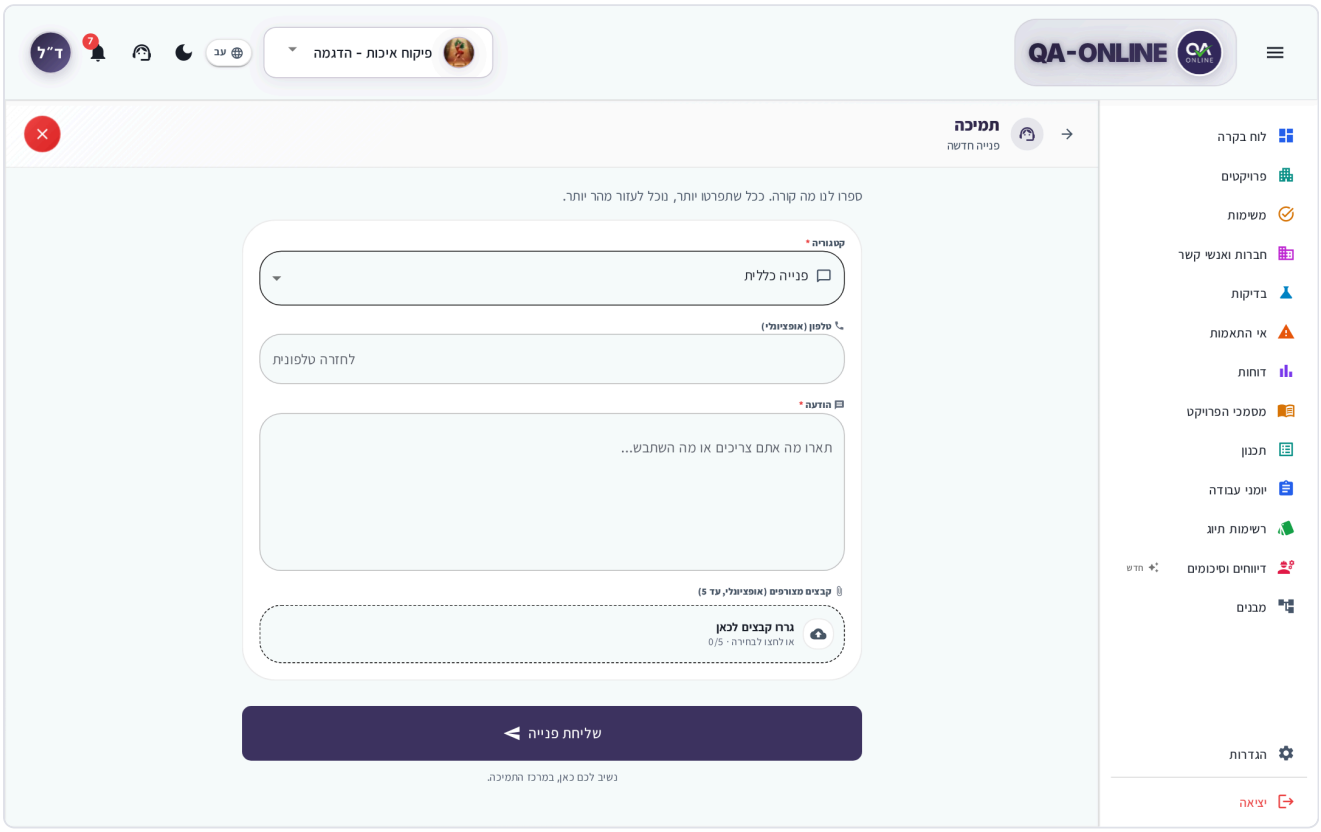
> **Note:** Only the requests you opened are shown, and only for the project currently selected in the Project selector. If you can't find a request, switch to the project where you opened it. Your colleagues' requests aren't shown to you.

How to open a support request

1. Make sure the right project is selected. The request is linked to it automatically.
2. Open the Support Center.
3. Click **New request** (on a computer – at the top of the window; on a phone – the wide button at the bottom of the screen). You can also click one of the topic cards:
   - **Something isn't working** – report an error or unexpected behavior.
   - **Access & permissions** – get access to a project, module, or document.
   - **Users & team** – add, remove, or update people in your project.
   - **Something else** – questions, feedback, or ideas.
4. Fill in the form:
   - **Category** – required. If you chose a topic card, it's already filled in.
   - **Phone (optional)** – for a follow-up call. It's usually pre-filled from your profile.
   - **Message** – required, at least 10 characters. Describe what you were trying to do, what happened, and on which screen.
   - **Attachments** – optional (details below).
5. Click **Send request**.

6. The **Request sent** screen appears with a **Reference number**. Click **View my requests** to return to the list.

> **Tip:** The more detail you share, the faster we can help. Include the item code (for example, a Non-conformance or Checklist code), attach a screenshot, and if you can, copy a link to the item and paste it into your message.



The new request form with category, phone, message, and attachments

Categories

In the **Category** list you can choose: **General**, **Bugs**, **Access / Permissions**, **Users Definitions**, **Structures Definitions**, **Checklists Definitions**, and **Documents Definitions**. Pick the closest one – the team will route your request to the right person.

How to attach files

1. In the request form, click the **Add photos or files** area, or drag files onto it (on a computer).
2. Choose up to **5 files**, each **up to 5 MB**.
3. To remove a file, click **Remove file** next to it.

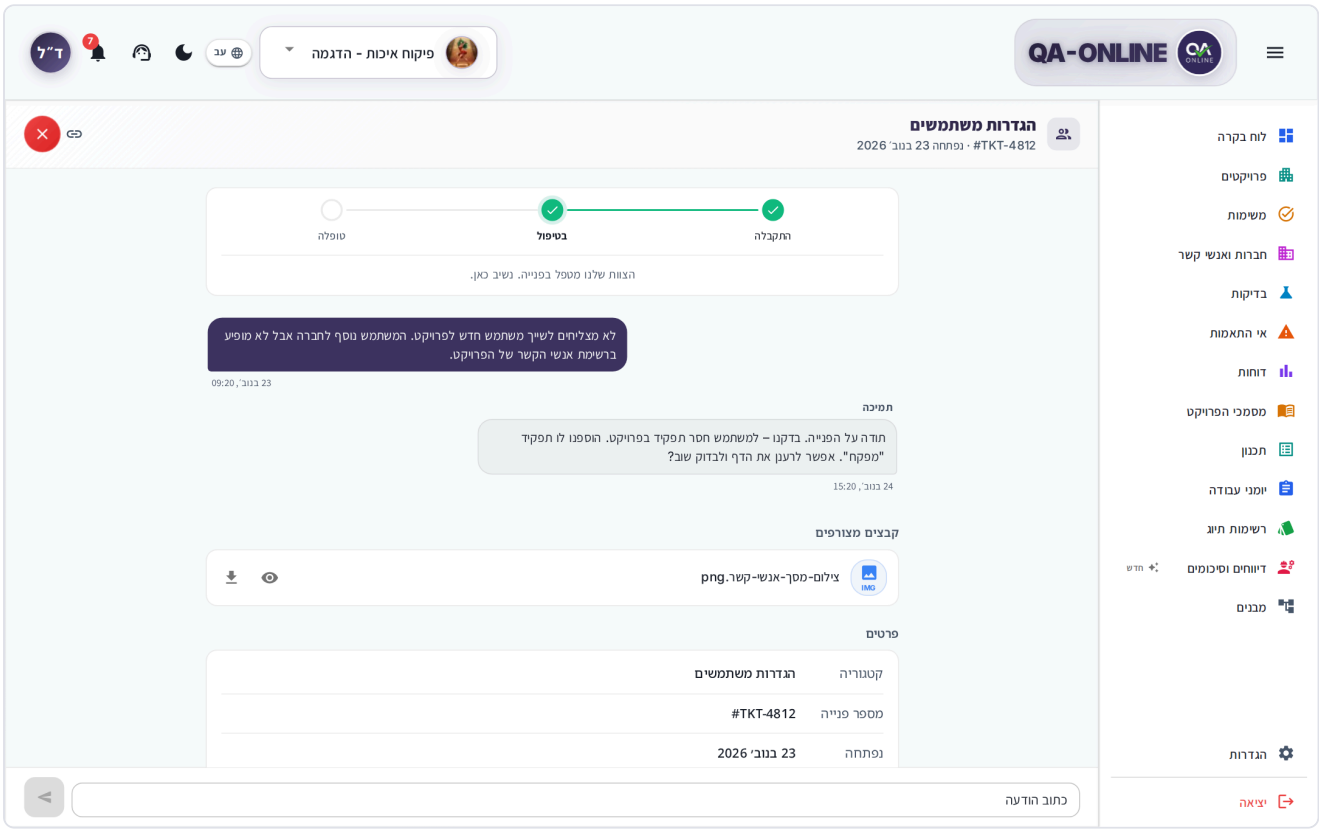
Supported file types: images (PNG, JPG, GIF, BMP, WebP), PDF, Word, Excel and CSV, TXT, ZIP, and drawing files (DWG, PLT, MPP).

If a file is too large, you'll see **File is too large. Maximum 5 MB per file.** – reduce its size (for example, take a screenshot instead of attaching the full file) or compress it into a ZIP.

> **Tip:** On a phone, you can take a photo directly with the camera or choose one from your gallery.

How to track a request

1. Open the Support Center.
2. In the **Active** tab, click the request.
3. In the request window you'll see:
   - In the header – the category, reference number, and the date it was opened.
   - **Request progress** – **Received** → **In progress** → **Resolved**, with a short line about what's happening now.
   - **Conversation** – your original message and the support team's replies.
   - **Attachments** – with **Preview** and **Download** buttons.
   - **Details** – category, reference number, dates, phone, and project.



A request window with request progress, conversation, and a reply field

Statuses

Status	Meaning
Received	We've received your request and will pick it up shortly.
In progress	The support team is working on your request. The reply will appear here.

Status	Meaning
Resolved	Your request has been resolved. Reply if you still need help.
Closed	The request is closed.
Cancelled	The request was cancelled.

Requests that are resolved or closed move to the **Resolved** tab.

How to reply to the support team

1. Open the request.
2. At the bottom of the window, type in the **Write a message** field.
3. Click **Send**.

- You can keep writing even after the request is **Resolved** (up to 24 hours after it was resolved) or **Closed**. Your message reopens the request – you'll see **Sending a message reopens this ticket.**
- A request that was cancelled, or resolved more than 24 hours ago, no longer accepts messages. You'll see **This ticket is closed for new messages.** – open a new request.
- Replies can contain text only. If you need to attach another file, open a new request and mention the previous reference number.

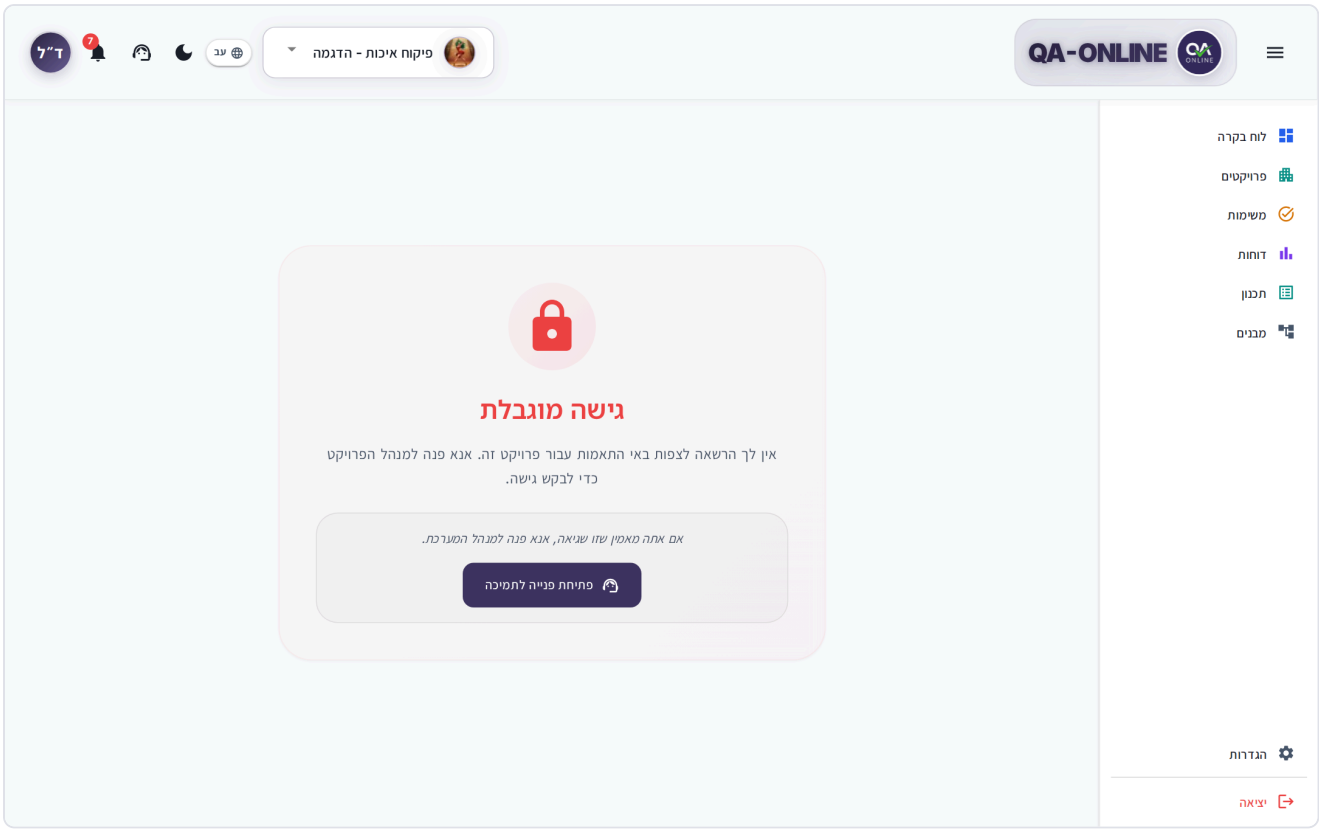
> **Important:** When the support team replies, you don't get an email or a notification. To see replies, open the Support Center – a request with a new reply is marked **New reply** and moves to the top of the list.

How to share a link to a request

Every request has a direct link. In the request window, click **Copy link** (on a phone – **Share**) and send it to a colleague or manager. Whoever opens the link needs to be signed in to the system, and the request opens directly. For a general explanation of links, see Common tools.

Opening a request from an error or access restriction

In most places where something doesn't work, the system offers to open a request for you – and in some cases the form opens with the category and message already filled in. Check the text, add details if needed, and send.



The Access Restricted screen with the Open support ticket button

Where	What you see	What's pre-filled
The **Access Restricted** screen (no permission for the module)	An **Open support ticket** button	The **Access / Permissions** category and a description of the module you can't access
A list that didn't load	An **Open support ticket** button	–
An empty list (for example, no projects or companies)	**If you believe this is a mistake, open a support ticket.**	–
The **Something went wrong** screen (unexpected error)	**Open a support ticket**, next to **Try again** and **Back to home**	The **Bugs** category and a description of the error
A failed export	The **Something went wrong** screen with **Open a support ticket**	The **Bugs** category and the export details

Important: Before you open a request about permissions, check with your organization's project manager. In many cases they can give you access right away, without waiting for support.

Tip: Missing a signature and can't add a row to a table? See Work logs – what to do when you have no signature.

On your phone

- The **Support Center** is in the user menu (tap your profile picture).
- The **New request** button stays fixed at the bottom of the screen.
- In the form, the **Send request** button stays fixed at the bottom. Your phone's **Back** button takes you from the form back to the list of requests.
- On the Dashboard, the open requests badge shows only an icon and a number.

FAQ

How long does it take to get a reply? Usually within one business day. The reply appears in the request window in the Support Center.

My request disappeared from the list. Check the **Resolved** tab, and make sure the selected project is the one where you opened the request.

The problem came back after the request was resolved. Should I open a new one? If less than 24 hours have passed, reply on the same request and it will reopen. Otherwise, open a new request and mention the previous reference number.

Can I contact you by phone or email? Yes. The details are in the Support Center, in the **Prefer to talk to us?** area.

Will I get an email when you reply? No. Replies appear only in the Support Center. Check it from time to time, or look for the badge with the number of open requests on the Dashboard.

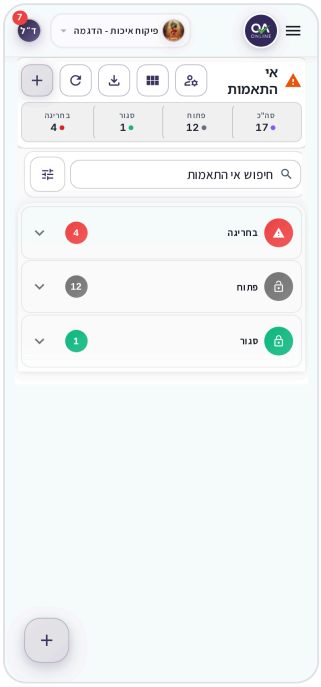
See also

- Common tools – copy a link to an item so you can attach it to a request.
- For organization system administrators – what your organization's system administrator can solve without contacting support.
- FAQ and troubleshooting – quick answers to common problems.

Using a phone or tablet

Everything you need to know to work in QA-Online from the field – on a phone or a tablet.

QA-Online adapts to your screen size. All modules are available on a phone too, with the same data and the same permissions as on a computer. What changes is the layout: menus open from the side or from the bottom, lists appear as cards, and actions move to a floating button or the three-dot menu.



The Non-conformances list on a phone in card view, with a floating + button

How to sign in from your phone

There are two ways. Both show the same system, with the same username and password:

Option	How to get started	What you get
The QA-Online app	Download the app from Google Play (Android) or the App Store (iPhone) and sign in.	Push notifications for new tasks, links to items that open directly in the app, file downloads, and adding tasks to your phone's calendar.
Browser	Open the system's address in your phone's browser and sign in.	The same system, with no installation.

Tip: Working in a browser? Add the system to your home screen. In the browser menu, choose **Add to Home Screen** (Android) or **Share** → **Add to Home Screen** (iPhone). The system opens full screen, with its own icon.

The SMS verification code is suggested automatically above the keyboard, so you don't need to copy it. For details, see Sign-in and account.

> **Note:** The sign-in address for the browser comes from your organization. There's no link to download the app from inside the system itself – search for **QA-Online** in your app store.

What's different on a phone – in brief

Topic	On a computer	On a phone
Side menu	Open at the side of the screen; you can collapse it	Opens when you tap the menu button (three lines) and closes after you choose an item
Project selector	A drop-down menu	A sheet that slides up from the bottom; close it with **Close** or by dragging down
Notifications, support, language, and color mode	Icons in the top bar	Inside the user menu (your profile picture)
Creating a new item	The **+** button in the screen header	A floating **+** button in the corner of the screen
List view	Table, cards, or calendar	Cards or calendar (no table)
Filters	Visible above the list	Collapsed; open them with the filters button
Actions on several items at once	Select rows in the table	Available on a computer only (in Checklists – through the wizards on the floating button)
Detail window	A window in the center of the screen	Full screen; actions are in the three-dot menu (**More options**)
Copying a link	**Copy link**	**Share** – opens your phone's share sheet

How to create an item from the field

1. Open the module from the side menu, for example **Non-conformances**.
2. Tap the floating **+** button in the corner of the screen.
3. Fill in the first part of the form.
4. Tap **Next** to move to the next part.
5. In the last part, the button changes to **Save**. Tap it.

> **Tip:** If a required field is missing in another part, **Next** takes you to it.

> **Important:** Before you create an item, check that the right project is shown in the header. Items are always saved in the active project.

Phone screenshots for each module

Every module has an **On a phone** section with screenshots of the list, the create window, and an open item:

- Checklists – creating, editing, and duplicating
- Non-conformances – creating and editing
- Tests – creating and editing
- Work logs – creating, editing, and duplicating
- Project documents – creating, editing, and duplicating
- Field reports – creating, editing, and duplicating
- Tasks – creating and handling
- Companies and contacts – adding a company and a contact

Taking photos and attaching files

1. In the item, tap the area for adding files (for example, **Add files** or **Attach file**).
2. In your phone's dialog, choose Camera to take a photo now, or Gallery / Files to pick an existing file.
3. If you want to mark up the image, tap **Edit image**.
4. Tap **Upload**.

Large images are reduced automatically before uploading, so uploads stay fast even on a cellular network. In the image editor, you can pinch to zoom. For details, see Common tools.

Dictating instead of typing

To write a long description without typing, tap the text field and then the microphone icon on your phone's keyboard. Speak, and the text is entered in the field. Review and correct it before you save. For details, see Common tools.

Tasks and notifications on your phone

- The **Tasks** screen shows **Incoming** / **Outgoing** at full width, and the **Active** / **Done** tabs above the cards.
- Tapping the task title opens the document. Tapping the details row opens its progress.
- The bell is in the user menu, and the number of unread notifications is shown on your profile picture.
- **Add to calendar** opens your phone's calendar app.

For details, see Tasks and approvals.

Push notifications

- **In the app** – when a new task is sent to you, you get a notification on your phone. Tap **Go to Task** to open it, or **All Tasks** to go to the Tasks screen. If the task is in another project, the app switches to the right project.
- **In a browser** – after you sign in, the browser asks whether to allow notifications. If you allow them, you'll get a notification about a new task even when the tab is in the background. Some phone browsers don't support this.

> **Not getting notifications?** Check in your phone's settings (or your browser's) that notifications for QA-Online are allowed. Even without notifications, all your tasks appear on the **Tasks** screen.

Modules with special behavior on a phone

- **Dashboard** – the sections appear as tabs at the top of the screen: **Analytics** | **Attention** | **Overview**.
- **Checklists** – the detail and step windows open full screen. **Save Step** and **Sign Step** sit side by side at the bottom. The floating **+** button also opens the wizards for bulk actions.
- **Work Logs**, **Project Documents**, and **Field reports** – table rows appear as cards. Tap a card to open **Edit row**.
- **Reports** – category navigation opens with the **Browse** button. Filters are collapsed, and wide tables scroll sideways.
- **Design** – PDF, DWG, and PLT drawings open directly on your phone, with pinch to zoom.
- **Structures** – the tree appears as cards, one level at a time, with a breadcrumb trail at the top of the screen.
- **Companies & Contacts** – **Call** and **Email** open your phone dialer or email app.
- **Support Center** – **New request** is a wide button at the bottom of the screen, and you can attach a photo straight from the camera.

Working with a weak signal

QA-Online works against the server, so you need an internet connection to save and load data.

- If the connection drops while the system is opening, the **Connection problem** screen appears. Check your signal and click **Try again**.
- If a save fails, don't close the window. Wait for a better signal and click **Save** again.
- Before you go down to a basement or an area with no signal, save what you've already filled in.

> **Note:** Uploading videos and many photos on a slow cellular network can take time. Don't close the window until the upload finishes.

For details about the connection screens, see Sign-in and account.

Tablet

On a tablet, the system looks like it does on a computer, with a collapsible side menu and notifications in the top bar. When you hold a narrow tablet upright, some screens switch to the phone layout. In Checklists, the tablet also shows the **Advanced Actions** panel.

FAQ

Do I need to install an app? Not necessarily. The browser shows the same system. The app adds push notifications and direct opening of links.

I don’t see a table on my phone. How do I select several items at once? Actions on several items at once are available on a computer. In Checklists, you can use the wizards on the floating **+** button.

Where’s the bell on a phone? In the user menu. Tap your profile picture in the corner of the header.

How do I send a colleague a link to an item from my phone? Open the item and tap **Share**. Choose WhatsApp, email, or any other app.

My browser won’t let me take a photo. Allow the browser (or the app) to use the camera in your phone’s settings, and try again.

See also

- Sign-in and account – signing in, the SMS code, and connection problems.
- Getting to know the screen and navigation – the side menu, lists, and the detail window.
- Common tools – attaching photos, the image editor, and voice typing.
- Tasks and approvals – handling the tasks that come to you.

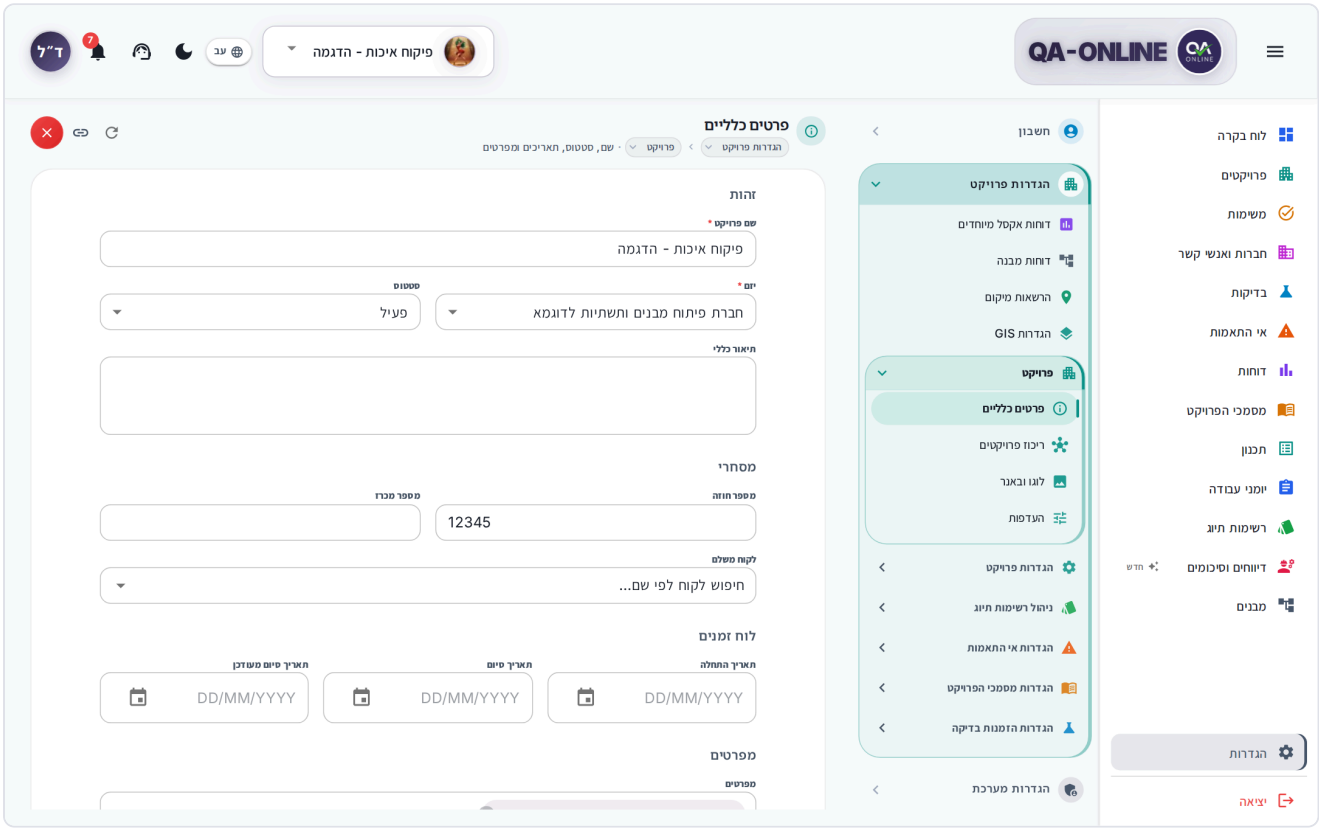
More

For organization system administrators

Manage the users, permissions, and project settings in your organization – without contacting support for every change.

This chapter is for project managers and system administrators at the customer organization: the people who add users to a project, decide what each role can see, and configure how modules behave in a project. Regular users won't see most of the options described here.

> **Don't see this option?** **System Settings** and most of the **Project Settings** are shown only to people whose role includes access to the **Project report**. Other users see only **Preferences** in the project settings. If you're supposed to manage the project and you don't see the options, contact your organization's system administrator or open a support request.



An administrator's Settings screen, with the Account, Project Settings, and System Settings groups

How permissions work

Permissions in QA-Online are built from three simple layers:

1. **User** – a personal sign-in account (username, email, language, signature).
2. **Project assignment** – a user sees only the projects they're assigned to. Each assignment sets the **Contact** (the person, and the company they represent in the project) and the **Permission** (the role).

3. **Role (permission group)** – determines which modules the user can access, whether access is **Read only**, and which actions are allowed (for example, creating, signing, or closing).

What this means in practice:

- The same person can be a manager in one project and a viewer only in another.
- A module the user has no permission for doesn't appear in the side menu. Someone who reaches it from a link sees **Access Restricted** and an **Open support ticket** button.
- In some projects, you can also restrict a contact to specific locations (structures or areas) – see Location permissions.
- Hiding a module in **Customize menu** is a personal preference only and doesn't change permissions (Settings).

> **Tip:** Before you change a role that many users share, consider creating a new role instead. A change to a role applies immediately to everyone assigned to it.

How to add a new user

The recommended way is through **Companies & Contacts**, because the user is linked right away to their contact and company:

1. Make sure the company and the contact exist in Companies and contacts. If they don't, add them.
2. Open the **Contact details**, click **More actions**, and choose **Create user**.
3. Fill in **Username**, **Email**, **Default language**, and **Permission group**. You can also attach a **Signature** image.
4. Click **Create user**.

For the full explanation, see Companies and contacts.

From System Settings

Administrators with the right permission can also manage users in **Settings** → **System Settings** → **Users & Permissions** → **Users**:

1. Click **Add user**.
2. Fill in **First name**, **Last name**, **Username**, **Email**, **Role**, and **Default language** (all required). You can also add a **Mobile number** and select **Force 2FA**.
3. Click **Save**. The message **User created successfully** appears.

In the user list you can search by name, email, role, or mobile number, and see for each user whether they're **Active** and whether they **Have a signature**.

Screenshot

User management in System Settings

`images/23-users.png`

How to assign a user to a project

1. In **Users**, click the arrow in the user's row (**Show projects**), or choose **Project Contact Management** from the row menu. The user's list of projects opens.
2. Click **Add project**.
3. Choose the **Project**, **Contact**, **Permission**, and **Default language**.
4. Click **Save**.

To change a user's role in a project, click **Edit** in the assignment row. To remove a user from a project, click **Delete** and confirm in the **Remove project assignment?** dialog. The user themselves isn't deleted – they just won't see the project anymore.

> **Important:** A user who isn't assigned to a project sees **You don't have access to this project** if they open a link to an item in that project.

How to manage an existing user

In **Users**, click the three-dot icon (**Actions**) in the user's row:

Action	What it does
Edit	Update details (including email), role, language, and **Active** / **Inactive** status.
Project Contact Management	Assign the user to projects – see How to assign a user to a project.
Reset password	Send a password reset to the user. Confirm in the **Reset password?** dialog.
Upload signature	Upload the user's digital signature image.
Delete	Permanently remove the user from the system.

> **Note:** Deleting a user is permanent. If the person has only left the project, it's better to remove their project assignment or mark them **Inactive**.

Signatures

Users can't upload a signature themselves – only you can. Next to each user in the list, you'll see **Has signature** or **No signature**. When a user can't add a row to a table because they have no signature:

1. Get a clear image of their signature from them, in dark ink on a white background.

2. In **Users**, open their row menu and choose **Upload signature**.
3. Choose the image file. The message **Signature uploaded successfully** appears.
4. Ask the user to close and reopen the document.

For what the user sees and what they can do on their own, see Work logs – what to do when you have no signature.

Changing a user's password and profile details

1. Open **Users & Permissions** → **Users Settings**.
2. In **Select user**, search for the user and select them.
3. Update **First name** and **Last name** as needed.
4. To change the password, open **Change password** and enter the **Old password**, **New password**, and **Confirm password**.
5. Click **Save changes**.

> **Note:** Changing a password here requires the user's current password, so it's mainly suited to changing your own password. For another user who needs a new password, use **Reset password** in **Users**.

How to define roles and permissions

1. Open **System Settings** → **Users & Permissions** → **Roles**.
2. Choose a role from the list, or click **Add role**, enter the **Role name**, and click **Create**.
3. In the top tabs, choose an area of the menu. For each **Menu item**, set:
   - **Enabled** – the role sees the module.
   - **Read only** – they can view, but not change.
   - **Permissions** – detailed actions (for example, creating, signing, or closing).
4. Click **Save**. Until you save, **You have unsaved changes** is shown.

> **Tip:** If a user doesn't see the change right away, ask them to refresh the screen or sign out and back in.

Screenshot

The role permissions editor with the Enabled, Read only, and Permissions columns

`images/23-roles.png`

Distribution lists and project manager

- **Distribution Lists Management** – groups of contacts who receive messages and tasks together (for example, at Checklist steps).
- **Project Manager Contact** – the contact who receives notifications as the project manager.

Location permissions

You can limit which structures in the project each contact can access. This is useful, for example, for a contractor who works in only one building.

1. Make sure the right project is selected in the Project selector.
2. Open **Project Settings** → **Location Permissions**.
3. Click **Add contact** and choose a contact (**Select contact**). To update an existing contact, click **Edit contact**.
4. In the structure tree, select the structures they can access. You can filter with **Search structures**.
5. Click **Save**.

To remove a contact's restriction, click **Delete** and confirm in the **Remove location permissions?** dialog.

Project settings

All settings in the **Project Settings** group apply to the project currently selected in the Project selector.

> **Important:** Before you make any change, check the top bar to confirm you're in the right project.

Section	What you set
General details	Project name, initiator, status, contract and tender numbers, start and end dates, description, paying client, and specifications. Click **Save** when you're done.
Project settings	**Display Options**, rules for **Non-conformities**, **Workflow & permissions**, **Structural Levels**, **Project identifiers**, and **External link**.
Project report	A summary report of Checklist and work progress.
Logo & Banner	**Project logo** (shown in the header and in project lists) and **Project banner** (for reports). PNG, JPEG, or WebP, up to 5 MB.
Preferences	Default project and location – personal to each user (Settings).

Module settings in a project

The same group has settings for each module:

- **Checklist Settings** – **Project checklist types** (which types are available) and **Checklist steps** (which steps are shown, and which distribution list is assigned to each step).
- **Non-Conformances Settings** – fields, severity levels, correction effectiveness, signing roles, and numbering.
- **Project Documents Settings** – which document types are available in the project.
- **Exam Orders Settings** – days to receive results, and the project's labs.

- **Special Excel Reports**, **Structural Reports**, **Location Permissions**, and **GIS Settings** (coordinate points).

Most of these screens have a changes bar at the bottom. Changes are saved only after you click **Save**.

> **Tip:** Many settings screens have two panes – **In project** and **Available**. Drag an item between the panes, or use the arrow buttons, to add it to or remove it from the project.

System settings

The **System Settings** group applies to the whole organization, not just the current project. It has five sections:

Section	What's in it
Users & Permissions	**Roles**, **Users**, **Users Settings**, **Distribution Lists Management**, and **Project Manager Contact** – explained in this chapter.
System Settings Management	Translations, general tables, structure and activity types, test management, and categories.
Suppliers & Initiators Management	Your organization's database of suppliers and initiators, their categories, and related permissions.
Tests Report	The unit types and units of measurement used in tests.
Forms Management	Building templates for Checklists, quality documents, and report definitions.

> **Note:** Changes to System Settings affect every project in the organization. If you're not sure what a change will do, open a support request before you save.

Managing Checklists

There are three places, depending on what you need to do:

What you want	Where
Choose which Checklist types are available in the project and set up steps	**Project Settings** → **Checklist Settings**
Build or edit a Checklist type template (sections, steps, fields)	**System Settings** → **Forms Management** → **Checklist Settings** (and for a new template – **New Checklist**)
Perform an action on many existing Checklists at once	The **Checklists Management** screen in the Checklists module

Bulk action on Checklists

1. In Checklists, click the **Manage checklists** icon in the screen header. The icon is shown only to people with permission to manage Checklists.
2. Choose an **Operation** and a **Checklist type**.
3. If needed, open **Advanced filters** to narrow the results (for example, by step or contact). Click **Search**.
4. Select the Checklists you want, or **Select all**.
5. Click the button that applies the operation, and confirm in the **Confirm operation** dialog.

> **Note:** The operation applies to every Checklist you selected. Review your selection before you confirm.

How to arrange the side menu for your team

There's no central setting for the whole team's side menu. Each user chooses a **Current** or **Grouped** menu for themselves and customizes it, separately for each project. What's up to you as an administrator is **which modules** appear – that's set in the role (How to define roles and permissions).

To help a colleague arrange their menu, send them a direct link to the customization window: in **Preferences** → **Customize menu**, click the copy-link button in the window. For the full explanation, see Settings.

FAQ

A new employee can't see the project. What should I check? That they have an active user, and that they're assigned to the project with a suitable role. After the assignment, they need to refresh or sign in again.

A user sees a module but can't save. Their role probably has the module marked **Read only**, or they're missing a detailed permission. Check **Roles**.

How do I remove an employee who has left? Mark them **Inactive** or remove their project assignments. It's better not to delete them – deletion is permanent.

I changed a setting and nothing happened. Check that you were in the right project, and that you clicked **Save**. If needed, click the refresh icon next to the X.

See also

- Companies and contacts – adding contacts and creating users from them.
- Settings – each user's personal settings.
- Checklists – day-to-day work with the Checklists you've set up.
- Support Center – when you need help from the QA-Online team.

FAQ and troubleshooting

Quick answers to the most common questions, and fixes for frequent problems – all in one place.

Questions are grouped by topic. Each answer is short and points to the full chapter. Questions that apply only to a specific module appear at the end of that module's chapter.

Signing in and account

I forgot my password. On the sign-in screen, click **Forgot Password?**, enter your username and email address, and click **Reset Password**. You'll receive a temporary password by email. Sign in with it and choose a new password. See Sign-in and account.

The message said a link was sent, but the email contains a password. That's expected. The email contains a temporary password. Sign in with it, and the system will ask you to choose a new password.

How do I change my password while I'm already signed in? There's no screen for changing the password of a signed-in user. Sign out and use **Forgot Password?**, or ask your organization's system administrator to reset it. See Settings.

The SMS code isn't arriving. Wait for the countdown to finish and click **Resend code**. If the code never arrives, the phone number in the system is probably wrong – contact your organization's system administrator. See Sign-in and account.

I got "Temporarily locked". Three incorrect codes were entered. Wait 5 minutes, until the countdown ends, and try again.

I was sent back to the sign-in screen in the middle of my work. Your session expired. Sign in again. You'll land on the Dashboard, not on the screen you were on – reopen the item and check what was saved. See Sign-in and account.

I see "Your session has expired". Click **Sign in again** and sign in.

I don't have an account. On the sign-in screen, click **Sign Up** and fill in your details. The QA-Online team will get back to you. See Sign-in and account.

Phone and app

Is there a phone app? Yes. Search for **QA-Online** on Google Play or the App Store. You can also work in your phone's browser, with no installation. See Using a phone or tablet.

I'm not getting notifications about new tasks. In the app, allow notifications for QA-Online in your phone's settings. In a browser, allow notifications when the browser asks after you sign in. Either way, all your tasks appear on the **Tasks** screen. See Using a phone or tablet.

Projects, permissions, and menu

I don’t see a project I’m supposed to work in. A project appears only after you’re assigned to it. Contact your project manager or your organization’s system administrator.

A module is missing from my side menu. First, check that you selected the right project. Then check in **Settings** → **Account** → **Preferences** → **Customize menu** that you haven’t hidden it. If it’s still missing, you don’t have permission for it in this project – contact your project manager. See Getting to know the screen and navigation.

I can see a module, but there’s no create or save button. Your permission in the module is probably view only. Contact your project manager.

I switched projects and ended up on the Dashboard. Is that normal? Yes. This is how the system makes sure you don’t keep working by mistake on a screen from the previous project.

I changed the menu, and in another project it went back to the way it was. That’s expected. The menu layout and customizations are saved separately for each project. See Settings.

Are there keyboard shortcuts? There are no general shortcuts for navigation or search. Esc closes windows and menus, and in the image editor Ctrl+Z / Ctrl+Y undo and redo. See Getting to know the screen and navigation.

I clicked "Back" in my browser and the detail window closed. That’s expected. **Back** closes the detail window and returns you to the list, and **Forward** opens it again. See Getting to know the screen and navigation.

Signatures, approvals, and tasks

How do I upload a signature? You can’t upload a signature yourself. Your organization’s system administrator uploads it, and if no administrator is available, open a support request in the **Users Definitions** category. See What to do when you have no signature.

The "Add row" button is gray. In this table, every row is signed with your saved signature, and you don’t have a signature in the system yet. See the previous question.

The "Sign Step" button is gray. The step has required fields missing, or you don’t have permission to sign it. Hover over the button to see the reason. See Checklists.

I approved, but the task still appears under "Active". In Non-conformances, Tests, Design, and Structures, you need to click **Done** yourself. In Checklists, the task closes only after you sign the step. See Tasks and approvals.

I closed a task by mistake. Click **Undo** in the message that appears right away. If the message is already gone, go to the **Done** tab and click **Restore**.

How do I know whether the person I sent a task to has seen it? On the **Tasks** screen, choose **Outgoing**. **Read** – the recipient has seen the task. **In progress** – they opened the document. See Tasks and approvals.

Files, images, and export

Which files can I attach, and what size? PDF, Office documents, images, and videos. In Checklists, Work Logs, Project Documents, and Field reports – up to 50 MB per file. In tasks and support requests – up to 3 files, up to 5 MB each. See Common tools.

I edited an image that was already attached. Is the original saved? No. **Save** in the editor replaces the original image. Download the original before editing if you might need it. The same rule applies to markups on PDF drawings in Design.

The export is taking a long time. You can keep working. The file's status is shown in the **Downloads** window in the corner of the screen, and the preview opens when the file is ready. See Common tools.

I see "File is too large to preview". Click **Download without previewing**. The file downloads directly to your device.

What's the difference between a Full report and a Blank report? A **Full report** includes all the data, signatures, and files. A **Blank report** is an empty form for printing and filling in by hand.

Do I need AutoCAD to open a DWG file? No. DWG and PLT files open directly in the system, including on a phone. See Design.

Empty lists and display issues

The list is empty, even though I know it has items. A filter or search is probably still active. Click **Clear all** below the filter bar. Also check that you're in the right project, and that the **Mine** scope isn't selected instead of **All**.

I sent a colleague a link, and they see "You don't have access to this project". Your colleague isn't assigned to the project. Ask your project manager to add them.

I opened an address and ended up on the Dashboard. The address doesn't exist in the system, or you're not assigned to its project. Ask the sender for a new link.

The screen doesn't update after a change. Click the **Refresh** icon in the list header, or go to another screen and come back.

The page reloaded on its own. When a new version of the system is released, it loads automatically when you move between screens or return to the tab. There's no advance notice. Save your work often.

The screen switched to left-to-right. You selected a language that's written left to right (English, Español, or Русский). Change the language in the top bar or in Settings.

Some labels on the connection screen stay in English. The connection screens currently show a few labels in English, whichever language you've chosen: **Retrying automatically in …s**, **Stop auto-retry**, and **Continue (limited)**. See Sign-in and account.

Quick troubleshooting

What you see	What to do
Invalid username or password	Check your keyboard language and Caps Lock. If that doesn't help – **Forgot Password?**
Connection problem or **Can't connect right now**	Check your internet connection and click **Try again**
Waiting for your connection to come back…	You're offline. The system will continue on its own when the connection returns
Your session has expired	Click **Sign in again**
Unable to load data (inside a list)	Click **Try again**. If the problem continues – **Open support ticket**
A full-screen **Something went wrong**	Click **Try again** or **Back to home**. If it keeps happening – click **Open a support ticket** and describe what you did before the problem
Access Restricted	You don't have permission for this screen in the project. Contact your project manager, or click **Open support ticket**
You don't have access to this project	You're not assigned to the project in the link. Contact your project manager
No results match your filters	Click **Clear filters**
File is too large	Reduce the file size, or compress it into a ZIP
Unsupported file type	Save the file in another format, for example PDF or JPG
The screen is stuck loading	Refresh the page in your browser. If it keeps happening – sign out and back in

Still need help?

- Open a support request. Attach a screenshot and describe what you were trying to do and what happened. The team usually replies within one business day.

See also

- Sign-in and account – signing in, passwords, and connection problems.
- Getting to know the screen and navigation – the menu, lists, filters, and permissions.
- Common tools – files, export, and links.
- Support and help – opening a request and following up.
- Glossary – explanations of terms used in the system.

Glossary

A short explanation of every term that appears in the system and in the guide. The terms are in alphabetical order.

A–D

Active / Done – Two tabs on the Tasks screen: what's still open, and what's already been handled.

Active project – The project currently shown in the Project selector. Everything you create is saved in it.

All / Mine – A scope toggle in lists: all the items in the project, or only the items assigned to you.

Approval – An action by whoever is responsible for a step in a process: you approve and pass it on, or send it back for correction. See Tasks and approvals.

Bulk signing – Signing the same step on several Checklists at once. See Checklists.

Checklist – A quality-control form divided into steps, which accompanies work carried out on site. See Checklists.

Company – An organization that works on the project: a contractor, subcontractor, supplier, or consultant.

Contact – A person associated with a company in a project. A contact isn't necessarily a user who can sign in to the system. See Companies and contacts.

Customize menu – Changing the order of items in the side menu, hiding them, and grouping them. See Settings.

Dashboard – The project's home screen: metrics, tasks, and recent activity. See Dashboard and projects.

Detail window – The window that opens when you click an item in a list. There you view the item, edit it, and perform actions on it. See Getting to know the screen and navigation.

E–H

Element – The most detailed level in the project structure, for example a slab, a column, or a wall. See Structures.

Expected closing date – The target date for fixing a non-conformance. After it passes, the item counts as **Overdue**. See Non-conformances.

Favorites – Projects you've starred. They appear first in the Project selector.

Field report – A summary of a site walk or a meeting, with tasks assigned to responsible people and tracking of how they're handled. See Field reports.

For information – A recipient who gets an update about a document without a task being created for them. They don't need to approve.

Full report / Blank report – A PDF of an item with all its data, signatures, and files (**Full report**), or an empty form for printing and filling in by hand (**Blank report**).

I–M

Inactive – A marker for a company, contact, or user who no longer works on the project. The information is kept, but they no longer appear for selection.

Incoming / Outgoing – Two mailboxes on the Tasks screen. **Incoming** – what's waiting for you. **Outgoing** – what you've sent to others.

Lab order – A request to a laboratory to run a test (for example, on concrete), with a result of **Pass** or **Fail**. See Tests.

Limited mode – Working with data stored on your device when there's no stable connection as the system opens. Some of the data may not be up to date. See Sign-in and account.

Location – The place in the project that an item belongs to: subproject, structure, floor, element. You choose it in the location picker. See Common tools.

N–S

Non-conformance – A defect or deviation from the requirements found on site. It's documented with a description, location, and photos, assigned to a responsible party, and closed after it's fixed. See Non-conformances.

Notifications – The bell in the top bar: overdue test orders, tasks sent to you, and suppliers whose approval has expired. See Getting to know the screen and navigation.

Overdue – An item whose due date has passed and that's still open. Shown in red.

Periodic report – A report that gathers Tests, Checklists, Non-conformances, and documents over a date range. See Reports.

Permission group (role) – Determines which modules and actions are available to a user in a project. See For organization system administrators.

Pin – Keeping an important item at the top of the list so you can find it quickly. Pins are personal and are saved separately for each project. See Common tools.

Plan – A drawing or work plan in the **Design** module, as a PDF, DWG, or PLT file. See Design.

Plan version – A revision of a plan in the **Design** module, with a date, stage, and files. One of the versions is marked **Current**. See Design.

Project selector – The control in the top bar where you choose the active project. See Getting to know the screen and navigation.

QA-Online app – A phone app from Google Play or the App Store that shows the same system and adds push notifications. See Using a phone or tablet.

Quality document – A document in the **Project Documents** module, such as a protocol, approval, or control form, according to the types your organization has defined. See Project documents.

Recent activity – A personal list of the items you opened most recently, on the Dashboard.

Responsible party – The company or person who is supposed to handle a non-conformance.

Section / Segment – A precise stretch along a long element, such as a road, a pipeline, or a wall.

Side menu – The list of modules at the side of the screen. It shows only the modules you have permission for. See Getting to know the screen and navigation.

Signature – A user's saved digital signature. It's required to sign steps and rows in documents. Your organization's system administrator or Support uploads it. See Settings.

Step – A part of a document or Checklist process that a specific person or role is responsible for. You fill it in, save, and sign.

Structure – A building or part of the project. Structures determine the levels that appear in the location picker. See Structures.

Subproject – A main division of a large project, and the first level in the location picker.

Support request – A request to the QA-Online support team, with a reference number and tracking. See Support and help.

Survey order – A request to a surveyor to carry out a measurement on site, with the results entered in the system. See Tests.

T–Z

Task – An item waiting for you to handle: an approval, a signature, or a request from a colleague. All tasks are collected on the **Tasks** screen. See Tasks and approvals.

Temporary password – A password you receive when your account is created, or by email after **Forgot Password?**. When you sign in with one, you replace it right away with a permanent password. See Sign-in and account.

Two-step verification – An extra step when signing in: after your password, you enter a verification code sent by SMS. See Sign-in and account.

Verification code – A 6-digit code sent by SMS to verify your sign-in.

View only – Permission to open and read items without changing them.

Work log – A daily record of what happened on site: workforce, equipment, weather, and work performed. See Work logs.