Archipad

User Guide

VERSION 2.1.0

Archipad

Document information

This page identifies the scope, language, and maintenance information for this edition of the Archipad User Guide.

Document title	Archipad User Guide
Product version	Not specified in the project source files
Document version	2.1.0
Last updated	31 July 2026
Platforms covered	Web, iPad, and iPhone, where documented by the project sources
Language	English
Scope	Core project setup, Work Packages, plans and regions, Planning, meetings, observations, remarks, reports, and the Dashboard

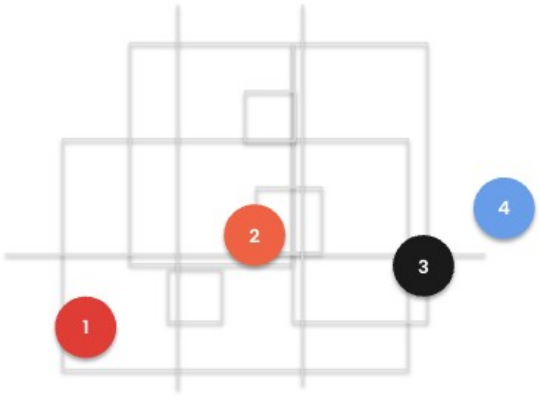
The guide is based only on the functional content, terminology, graphics, and production references available in the project. Unverified product behavior has not been added.

Table of contents

CHAPTER

01

Welcome to Archipad



1. Welcome to Archipad

Welcome to the Archipad User Guide.

Archipad helps construction professionals manage projects from planning and site inspections through handover and after-sales follow-up. It centralizes project information, plans, work packages, observations, remarks, reports, and project monitoring in a single workspace.

This guide explains how Archipad is organized and how its different modules work together. Rather than describing every command, it focuses on the workflows you use throughout a project's lifecycle.

Whether you are an architect, project manager, site supervisor, clerk of works, or construction professional, this guide will help you understand how to organize your projects and work efficiently with Archipad.

1.1 Who This Guide Is For

This guide is intended for anyone responsible for planning, coordinating, supervising, or documenting construction projects using Archipad.

Typical users include:

- Architects
- Project managers
- Site supervisors
- Construction managers
- Developers
- Owners' representatives
- Technical bureaus
- Engineers
- Contractors responsible for one or more work packages

The guide assumes that you are familiar with construction projects and their terminology. It focuses on using Archipad rather than explaining construction processes.

1.2 How Archipad Is Organized

Archipad organizes information around **projects**.

Everything you create—including plans, work packages, observations, remarks, meetings, reports, and dashboard information—belongs to a project.

Within each project:

- **Project Contacts** identify the people and organizations involved in the project, such as the owner, architect, engineers, inspectors, and technical bureaus.
- **Work Packages** define the different scopes of construction work and the contractors responsible for carrying them out.
- **Plans** provide the drawings on which observations are recorded.
- **Observations** track work that is linked to a location on a plan.
- **Remarks** record discussions, decisions, and actions that are not associated with a plan.

Understanding these concepts will make the rest of the guide easier to follow.

> **Remember**
> Everything in Archipad belongs to a project. Before you can create plans, observations, reports, or meetings, you first open or create a project.

1.3 Typical Project Workflow

Although every project is different, most projects follow a similar workflow in Archipad.

1. Create or open a project.
2. Add Project Contacts.
3. Define the project's Work Packages.
4. Organize the project's plans and regions.
5. Define the project planning by creating tasks, milestones, and dependencies.
6. Share your project with Project Contacts and Work Packages.

7. Create observations and remarks as work progresses.
8. Generate reports and distribute them to the appropriate recipients.
9. Monitor project progress using the Dashboard.

As projects evolve, observations are updated, remarks are expanded, meetings are documented, and reports are generated whenever required.

One of Archipad's strengths is that these activities can take place continuously throughout the project. You are not required to organize your work around meetings.

1.4 User Roles

People contribute to a project in different ways.

Project Contacts participate in the project by reviewing designs, making decisions, coordinating activities, or validating completed work.

Work Packages represent the construction work performed on site. Each work package is assigned to a contractor or subcontractor responsible for completing that scope of work.

Throughout this guide, responsibilities for observations are assigned to Work Packages rather than directly to contractors. If responsibility for a work package changes, all associated observations automatically inherit the new responsibility.

Depending on your permissions, you may be able to create, modify, review, or approve different types of project information.

1.5 Before You Begin

Before working with Archipad, make sure you have:

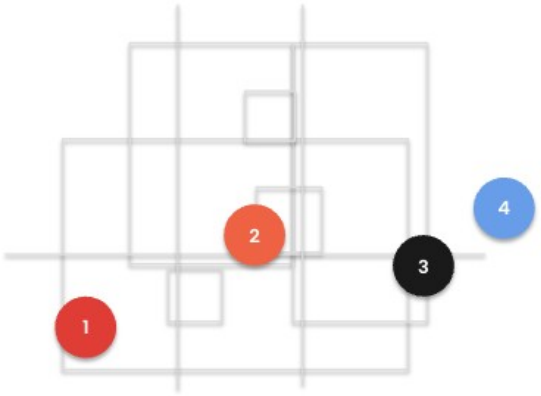
- Access to the appropriate project.
- The permissions required for your role.
- The plans and project information needed for your work.

The following chapters explain each module in the order in which most projects are organized. While you can read them independently, reading them in sequence provides a complete understanding of how information flows through a project.

CHAPTER

02

Project Information



2. Project Information

Every project begins with its Project Information.

The Project Information identifies the project, maintains its shared information, and manages the Project Contacts and documents that apply to the project as a whole.

Project Information provides the common foundation for everyone working on the project.

2.1 Project Details

Project Details identify the project and provide the information shared by everyone involved.

Depending on the project type, Project Information may include:

- Project name
- Address
- Construction type
- Company information
- Project number
- Reception date
- Project photo

Real estate projects may include additional information specific to the handover process.

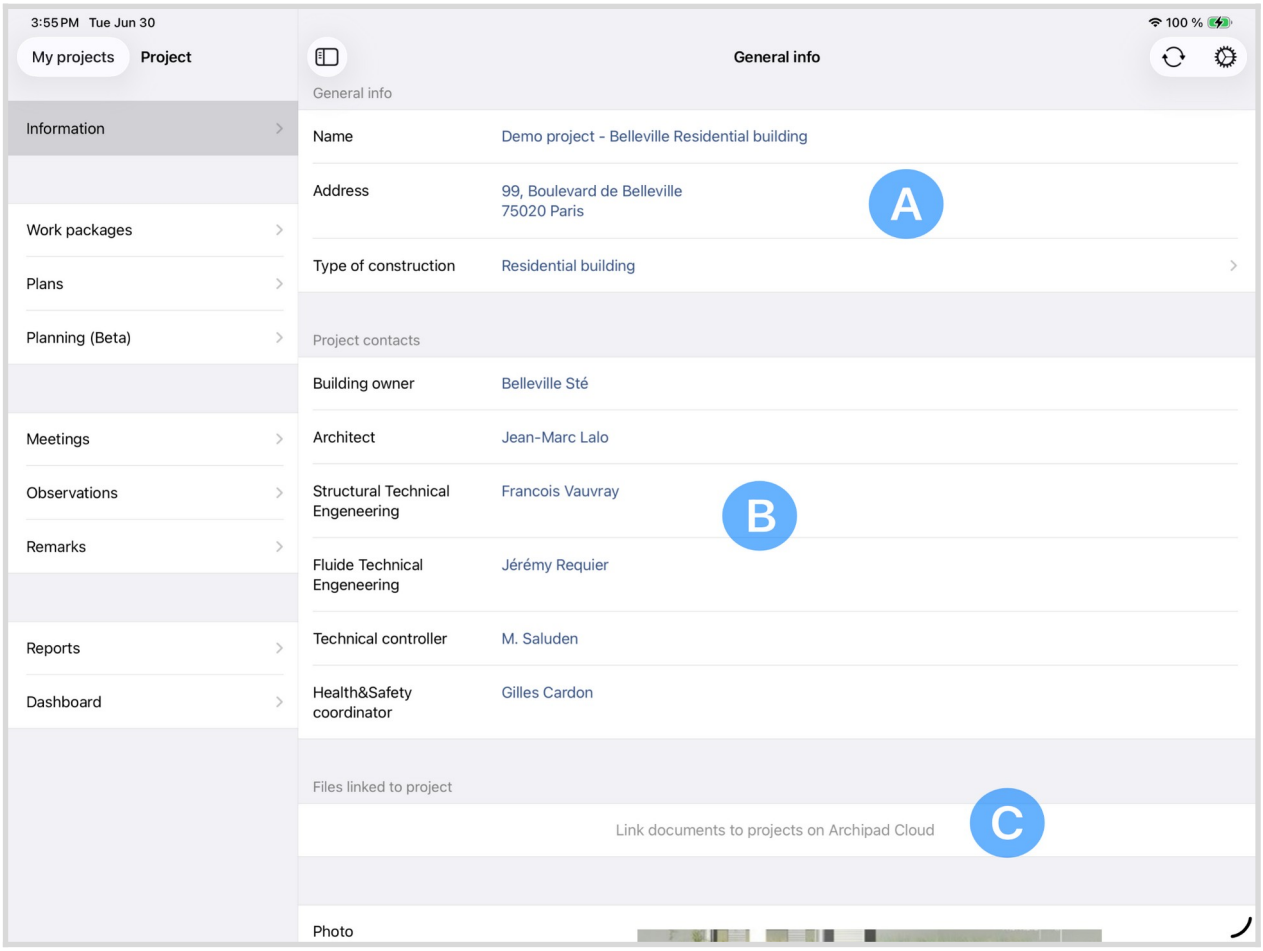


Figure 2-1. Project Information

A	**Project identity**	Identifies the project and displays its main information.
B	**Project Contacts**	Lists the people and organizations involved in the project.
C	**Shared project files**	Stores documents available to everyone working on the project.

2.2 Project Contacts

Project Contacts represent the people and organizations involved in the project.

Typical Project Contacts include:

- Owners
- Architects
- Engineers
- Technical bureaus
- Surveyors
- Inspectors
- Developers
- Owners' representatives

Project Contacts are shared across the entire project and can be selected throughout Archipad whenever people need to be associated with meetings, remarks, reports, or other project information.

> **Important**
> Contractors and subcontractors are managed separately through **Work Packages**.

2.3 Project Files

Project Information also stores documents that apply to the project as a whole.

Typical examples include:

- Contracts
- Specifications
- Administrative documents
- Reference documents
- Client documentation

These files remain available throughout the project and provide a central location for information shared by everyone working on the project.

2.4 Project Photo

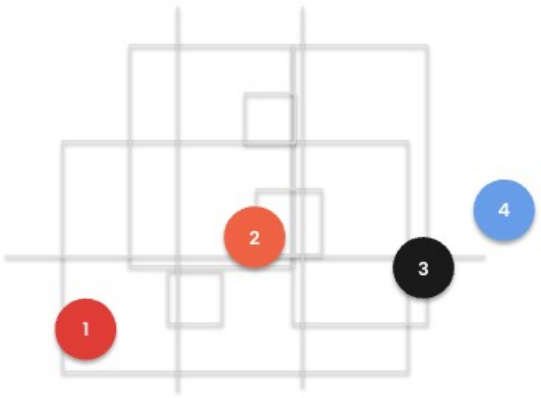
A project photo provides a quick visual reference and makes projects easier to identify throughout Archipad.

Although optional, adding a representative photo is recommended, particularly when managing multiple projects.

CHAPTER

03

Work Packages



3. Work Packages

Work Packages organize the construction work carried out on a project.

Each Work Package represents a specific scope of work, such as masonry, electrical, plumbing, or HVAC. It identifies the contractor or subcontractor responsible for completing that work, together with the person designated by that company as the responsible contact for the project.

Throughout Archipad, Work Packages provide the foundation for assigning responsibility, organizing observations, generating reports, and monitoring project progress.

3.1 Understanding Work Packages

Create one Work Package for each scope of work involved in the project.

Typical examples include:

- Masonry
- Structural work
- Roofing
- HVAC
- Electrical
- Plumbing
- Painting

Each Work Package remains part of the project throughout its lifecycle, regardless of the company or person responsible for carrying out the work.

> **Remember**
> A Work Package represents the work itself. You can change the responsible contractor or the responsible contact at any time without reorganizing the project.

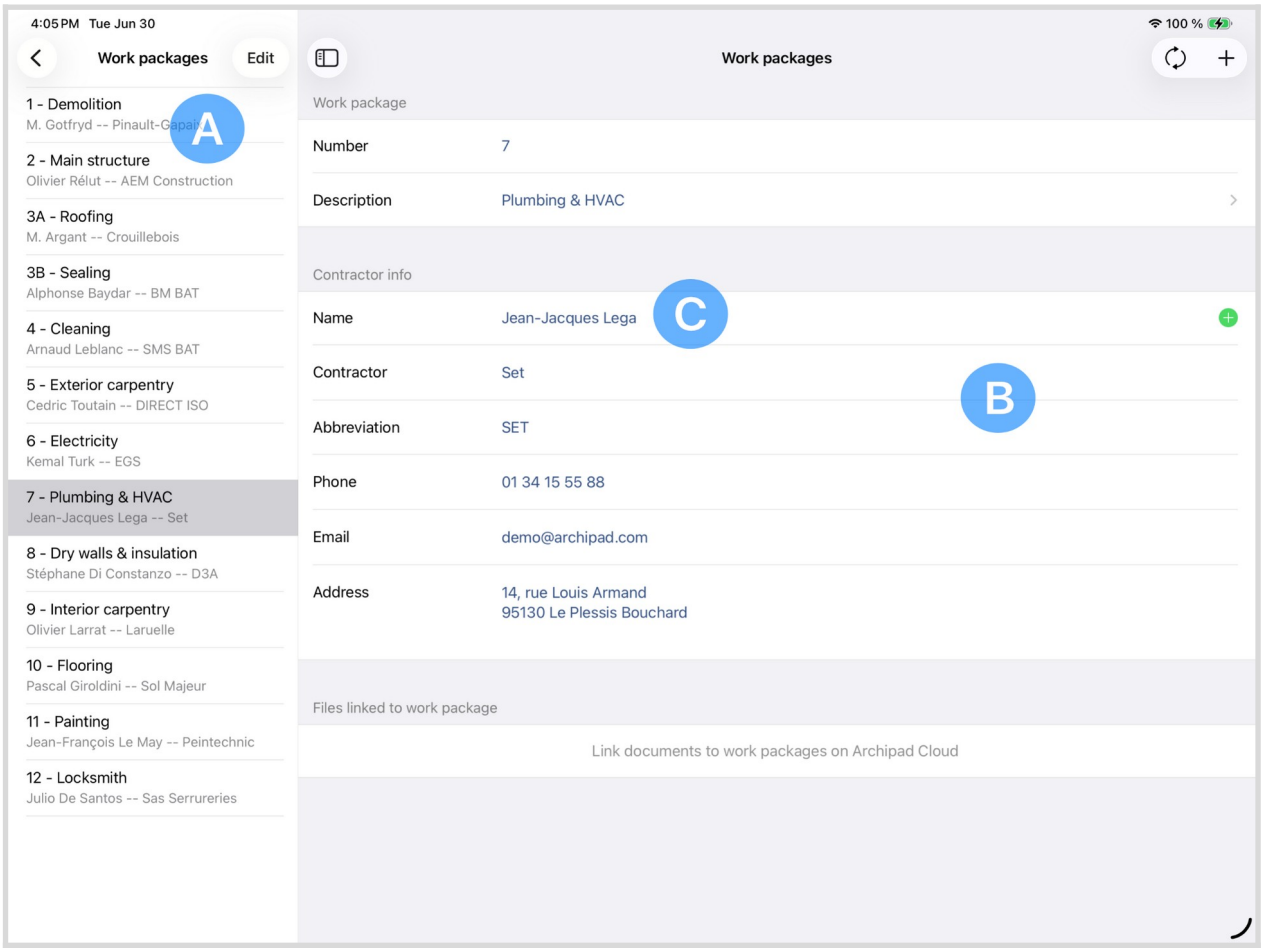


Figure 3-1. Work Packages

A	**Work Package list**
B	**Responsible contractor**
C	**Work Package contact**

3.2 Creating Work Packages

Create one Work Package for each scope of work involved in the project.

For each Work Package, select:

- A name that identifies the scope of work.
- The contractor or subcontractor responsible for carrying out that work.
- The responsible contact designated by that company for the project.

The responsible contact is the person you will communicate with throughout the project regarding that Work Package.

Take the time to define your Work Packages before creating observations. A well-organized list of Work Packages makes assigning responsibility and generating reports much easier throughout the project.

3.3 Defining Responsibility

For each Work Package, select:

- The contractor or subcontractor responsible for completing the work.
- The responsible contact designated by that company for the project.

The responsible contact acts as the primary point of contact for that Work Package throughout the project.

If the company appoints a different project manager or site supervisor during the project, simply select the new responsible contact. Likewise, if responsibility for the Work Package is transferred to another company, you can update the contractor or subcontractor without affecting the organization of the project.

3.4 Using Work Packages

Work Packages are used throughout Archipad.

They allow you to:

- Assign responsibility for tasks and observations.
- Filter information throughout the project.
- Organize reports.
- Monitor project progress.
- Generate reports for individual Work Packages.

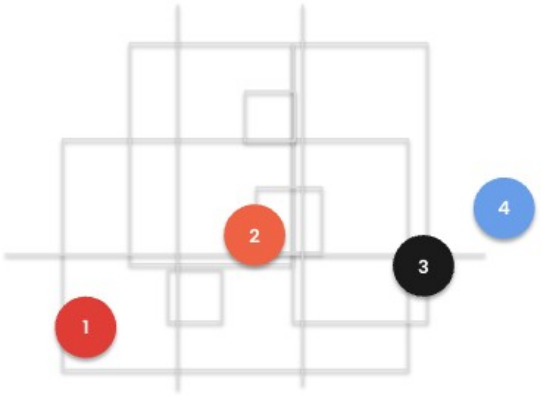
Using Work Packages consistently keeps responsibilities clear and makes it easier to follow up on outstanding work.

Because tasks and observations are assigned to Work Packages rather than directly to contractors, project information remains organized even when responsibilities change during the course of a project.

CHAPTER

04

Plans and Regions



4. Plans and Regions

Plans are at the heart of every construction project.

Use Plans to organize project drawings, navigate through the building, and provide the location on which observations are created and followed throughout the project.

As projects grow, Regions help organize plans into a structure that reflects the way you work.

4.1 Organizing Plans

Organize your project by grouping plans into Regions.

A Region can represent any logical part of the project, such as:

- Buildings
- Floors
- Zones
- Construction phases
- Disciplines

Regions are completely flexible. Organize them in the way that best matches your project and your team's workflow.

Within each Region, add the plans that belong to that part of the project.

Keeping plans well organized makes navigation easier, particularly on large or complex projects.

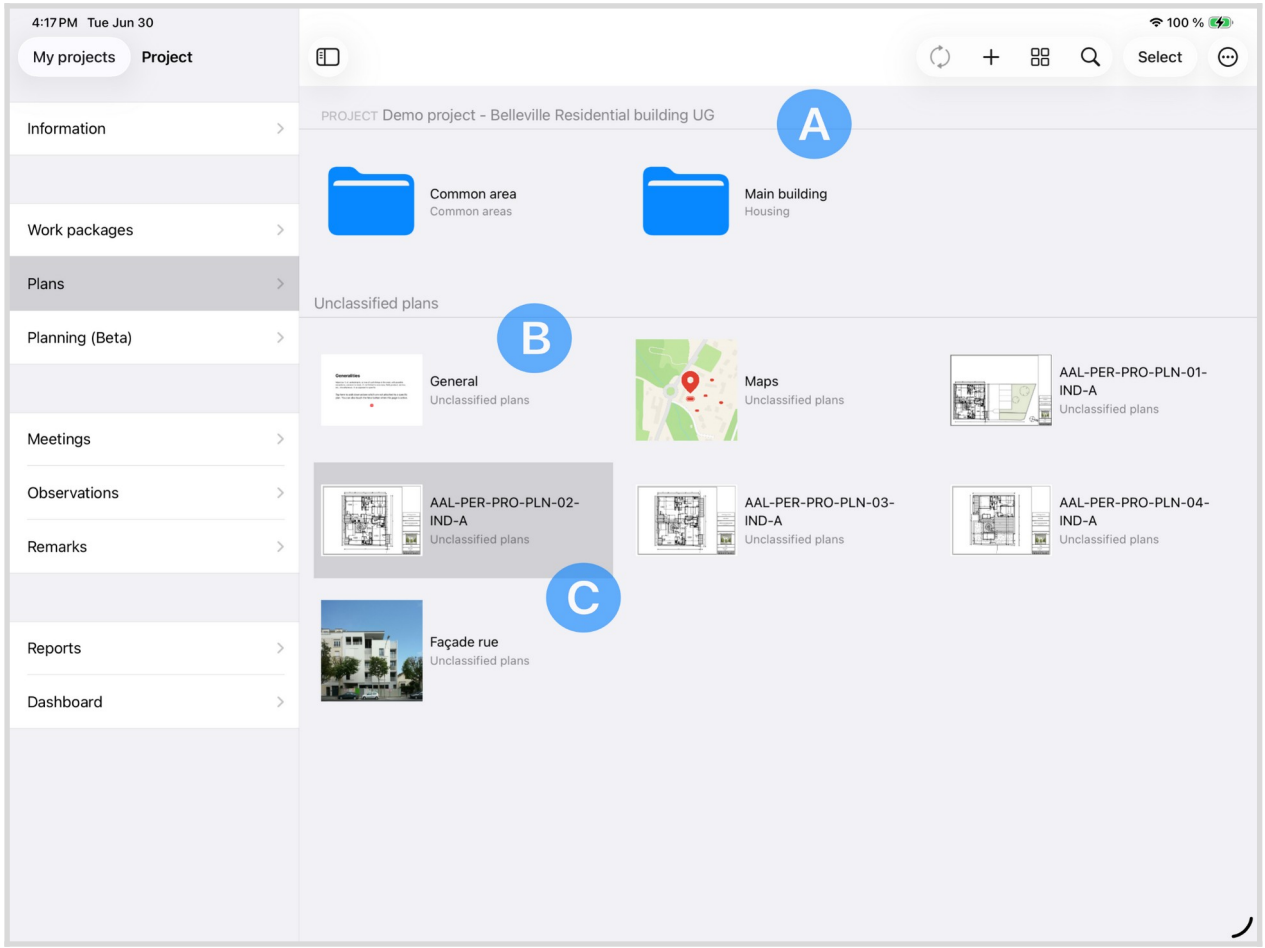


Figure 4-1. Plans and regions

A	**Regions**
B	**Plans**
C	**Selected plan**

4.2 Managing Plans

Add each project drawing to the appropriate Region.

As the project evolves, you can update plans by replacing them with newer revisions while preserving the observations and organization of the project.

Keeping plans up to date ensures that everyone works from the latest available information.

4.3 Viewing Plans

Select a plan to display it in the plan workspace.

When viewing a plan, you can:

- Zoom in and out.
- Pan across the drawing.
- Move quickly around large plans.

The plan always provides the visual context for the work being carried out on site.

Large projects often contain many plans. Organizing them into Regions makes it easy to move between different parts of the project.

4.4 Working on Plans

Plans are more than project drawings—they are the workspace where site follow-up takes place.

As work progresses, plans become the reference for recording, reviewing, and following observations throughout the project.

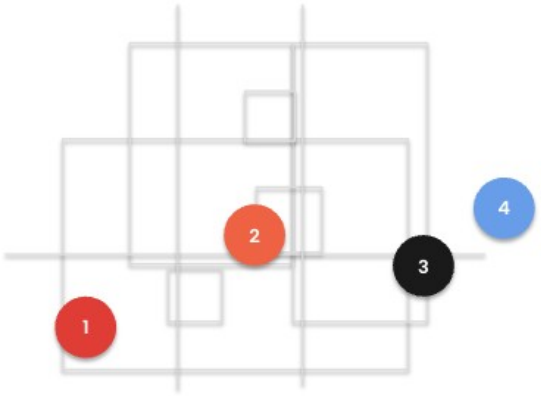
Selecting a plan displays the information associated with that drawing and provides direct access to the work being carried out in that area of the project.

The following chapters explain how Archipad uses plans during planning, meetings, observations, and project follow-up.

CHAPTER

05

Planning



5. Planning

Planning helps you organize and coordinate the work required to complete a project.

Use Planning to define tasks, milestones, and dependencies, visualize the project timeline, and coordinate work between different Work Packages.

The planning evolves throughout the project as tasks are completed, delayed, or rescheduled.

5.1 Creating the Project Planning

Begin by creating the tasks required to complete the project.

Each task represents a task or milestone within the construction process.

As the planning grows, organize tasks to reflect the different phases of the project and the sequence in which work will be carried out.

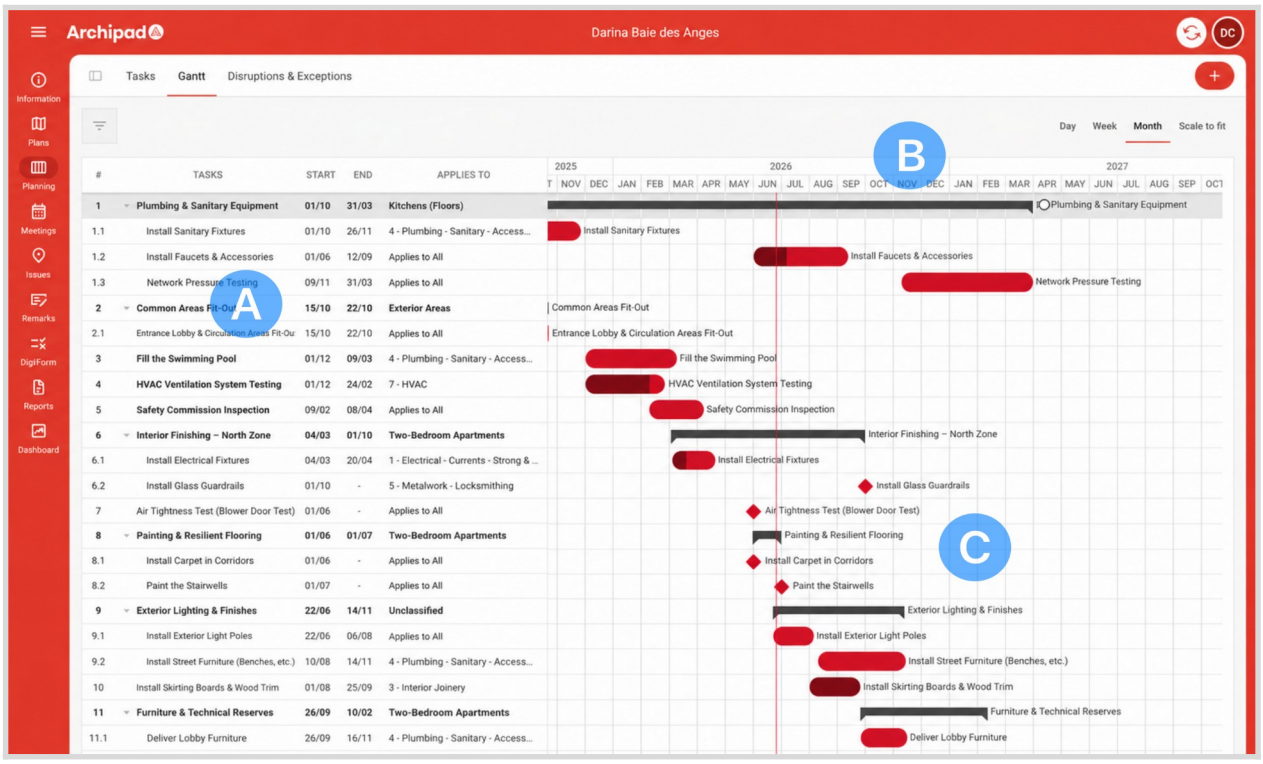


Figure 5-1. Project Planning

A	**Tasks**
B	**Timeline**
C	**Dependencies**

5.2 Organizing Tasks

For each task, define the information needed to plan the work.

Tasks can include:

- Start and end dates
- Duration
- Completion
- Milestones
- Assigned Work Packages

As construction progresses, tasks can be updated to reflect changes to the project schedule.

Keeping the planning up to date helps everyone work from the same timeline.

5.3 Managing Dependencies

Tasks can be linked together using dependencies.

Dependencies ensure that related tasks remain coordinated when the planning changes.

Moving the start date of a task automatically updates all dependent tasks, making it easier to maintain consistent planning throughout the project.

Planning does not calculate a critical path or automatically track project progress. It focuses on providing a flexible and easy-to-maintain planning that reflects how work is organized on site.

5.4 Reviewing the Planning

The planning is displayed as an interactive Gantt chart.

Use the Gantt chart to:

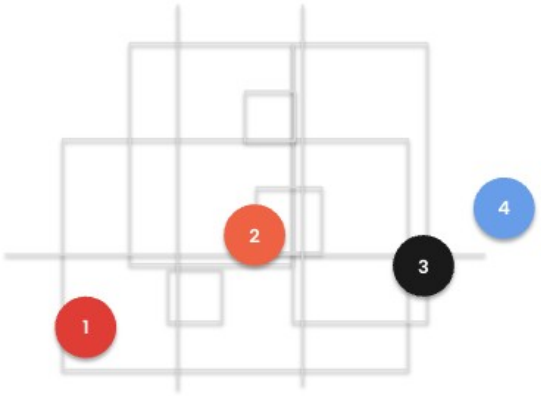
- Review the project timeline.
- Visualize milestones.
- Understand task dependencies.
- Identify the impact of scheduling changes.

Because the planning is interactive, you can adjust tasks directly within the Gantt chart while preserving the relationships between dependent tasks.

CHAPTER

06

Meetings



6. Meetings

Meetings document site visits, inspections, project reviews, and handovers.

Use a meeting to record who attended, document discussions, review observations and remarks, and keep a record of project decisions.

> **Note**
> Meetings are optional. You can create observations and remarks at any time without creating a meeting.

6.1 Understanding Meetings

Each meeting represents a snapshot of the project at a particular moment.

A meeting brings together the information recorded during a site visit, including:

- Meeting participants
- Attendance
- Signatures
- Notes
- Observations created or updated during the meeting
- Remarks discussed during the meeting

Meetings provide a structured record of project progress while leaving you free to work outside formal meetings whenever appropriate.

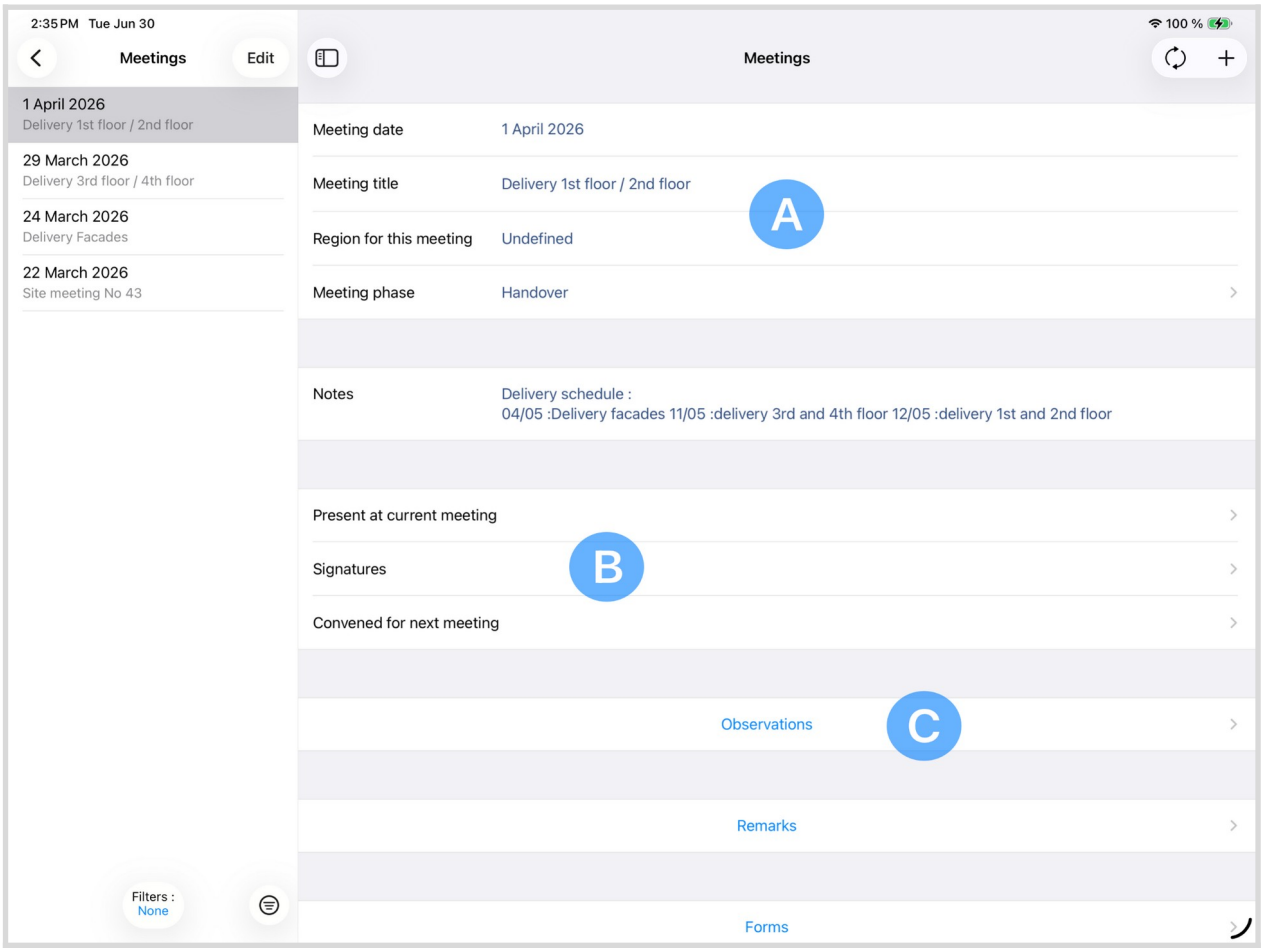


Figure 6-1. Meeting

A	**Meeting information**
B	**Participants and signatures**
C	**Observations associated with the meeting**

6.2 Creating a Meeting

Create a meeting whenever you want to document a site inspection, coordination meeting, or project review.

For each meeting, define:

- Date and time
- Title
- Region (optional)
- Phase
- Participants

Once created, the meeting becomes the reference for the information recorded during that visit.

When creating a meeting, you can optionally associate it with a Region.

Doing so limits plan selection to that Region and any of its sub-regions for the duration of the meeting. This helps keep the meeting focused on the relevant part of the project and reduces the risk of selecting plans from unrelated areas.

This is particularly useful for large projects and real estate developments. For example, when carrying out the handover of an apartment, restricting the meeting to that apartment's Region ensures that only the plans belonging to that property are available during the inspection.

6.3 Conducting a Site Inspection

During a site inspection, use the project plans to review existing observations and create new ones where necessary.

Observations and remarks created or updated during the meeting are automatically associated with it.

This provides a complete record of the work reviewed during the visit while allowing project follow-up to continue independently between meetings.

6.4 Recording Attendance

Meetings allow you to record each participant's attendance.

Participants can be marked as:

- Present
- Absent
- Late
- Excused

When required, participants can sign the attendance sheet directly during the meeting.

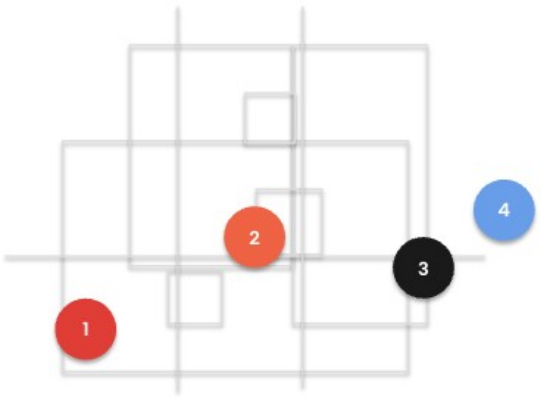
You can also invite participants to the next meeting, allowing Archipad to keep track of who was convened for each project review.

Attendance, signatures, and meeting notes can be included automatically when generating reports based on a meeting.

CHAPTER

07

Observations



7. Observations

Observations are the foundation of project follow-up in Archipad.

An observation records work that requires attention at a specific location on a plan. From the moment it is created until it is closed, it provides a complete history of the work performed, the decisions taken, and the exchanges between everyone involved in the project.

7.1 Understanding Observations

Every observation is attached to a location on a plan.

During construction, these records are referred to as observations. During handover, they are commonly referred to as snags. They are managed in exactly the same way. Only the terminology used in reports changes.

An observation can contain:

- A location on a plan
- A Work Package
- A description
- Photos and sketches
- A due date
- A status
- Comments and history

Because every observation remains attached to its location, the plans become a permanent record of the project's evolution.

7.2 Two Ways to Manage Observations

Archipad provides two complementary workspaces for managing observations.

Plan Workspace

The Plan workspace is where observations are created and where most day-to-day follow-up takes place.

It combines:

- the plan,
- the observation list,
- the observation details,
- and the observation markers displayed on the drawing.

Selecting an observation from either the plan or the observation list immediately displays its details.

This workspace is ideal for reviewing work in its physical location and understanding the context of each observation.

Observation Table

The Observation Table provides a project-wide view of every observation, regardless of the plan on which it was created.

It is designed for reviewing, filtering and editing observations across the entire project.

From the table you can:

- Filter observations using multiple criteria.
- Search for specific observations.
- Edit one or several observations.
- Customize the visible columns.
- Sort information to suit your workflow.
- Jump directly to the corresponding plan.

Selecting the plan icon opens the drawing, highlights the observation, and displays its details, making it easy to move between the project overview and the plan itself.

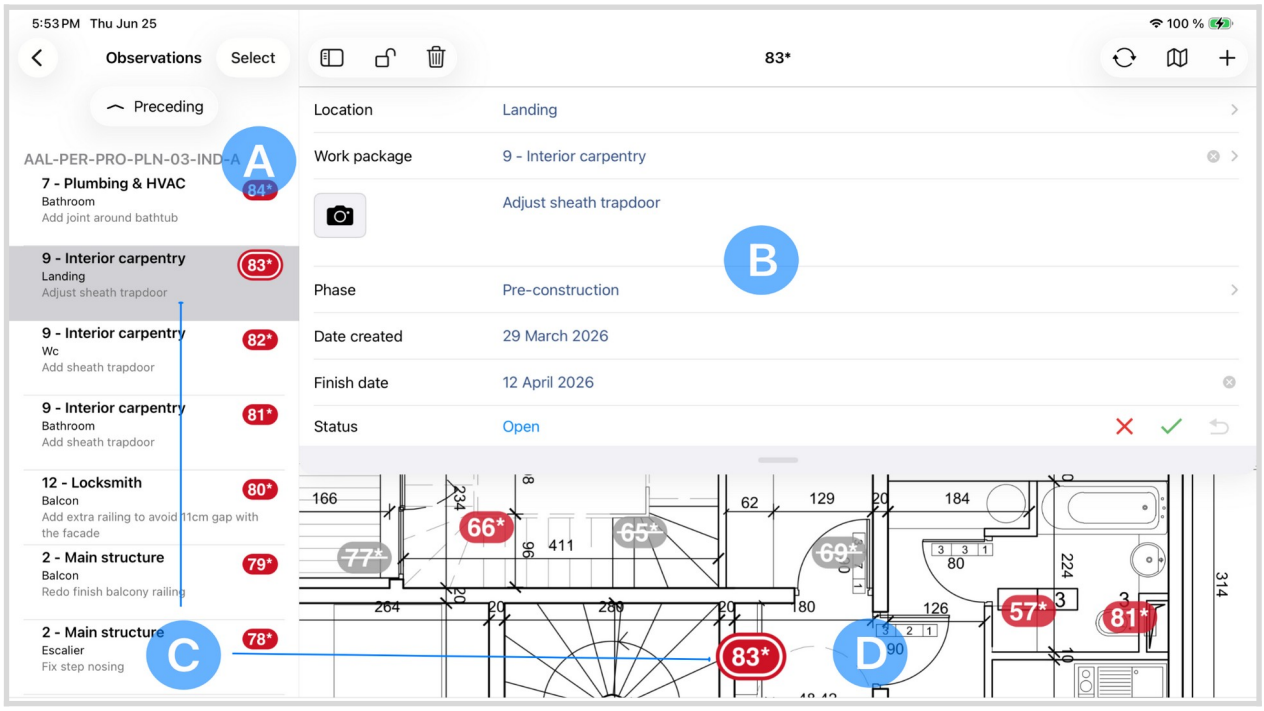


Figure 7-1. Managing observations from the Plan workspace

A	**Observation list**	Displays all observations associated with the current plan. Use the list to review observations, identify their status, and quickly select the observation you want to inspect.
B	**Observation editor**	Displays the complete information for the selected observation. Depending on your permissions, you can review or modify information such as work package, dates, status, photos, and comments.
C	**Selected observation**	The selected observation is highlighted both in the list and on the plan. This visual link makes it easy to identify the exact location of the issue within the project.
D	**Plan**	The plan provides the spatial context for observations. Observation markers identify the location of issues directly on the drawing and remain associated with that location throughout the observation lifecycle.

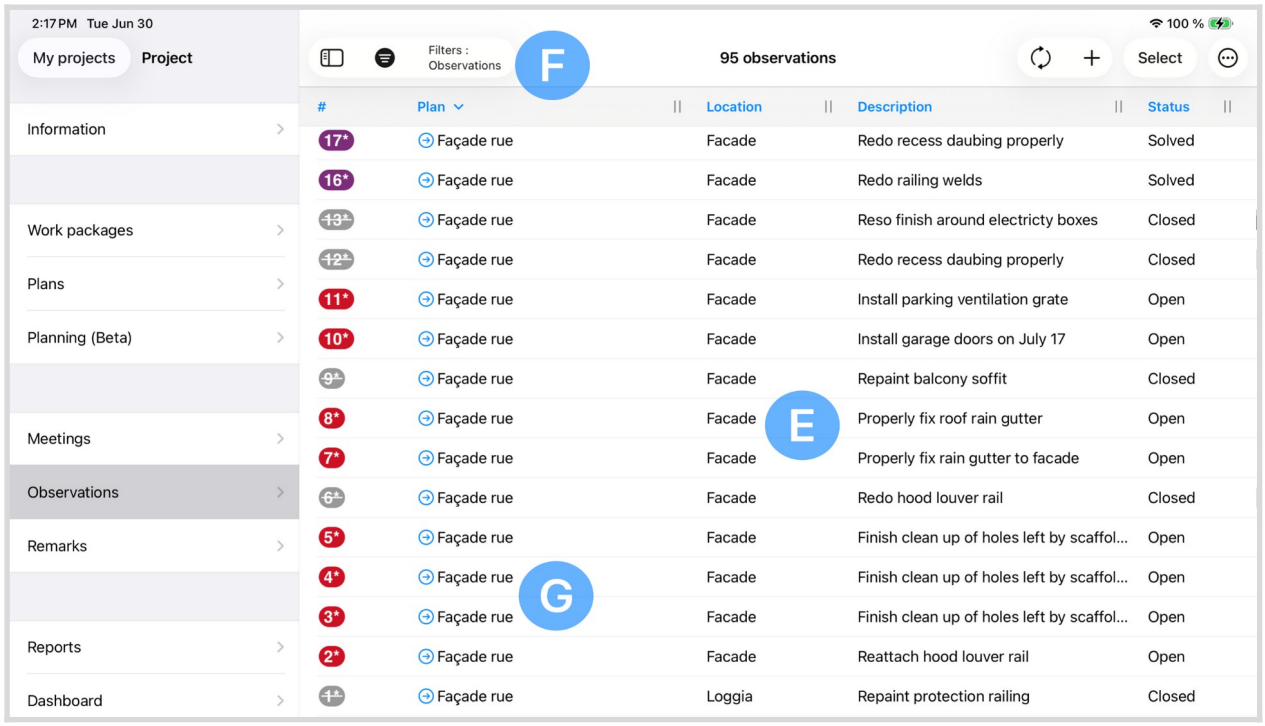


Figure 7-2. Managing observations from the Observations table

E	**Observation table**	Displays all observations associated with the current project.
F	**Filters**	Limit the observations shown by filtering by work package, status, location, ...
G	**Link to the plan**	Tap the link to view the observation directly on the corresponding plan.

7.3 Creating Observations

Create observations directly from a plan by selecting the location where work requires attention.

Enter the information available at the time of creation. No field is mandatory, but at least one value must be entered before leaving the plan. Empty observations are discarded automatically.

Assign each observation to the appropriate Work Package so that responsibility is immediately established.

New observations receive a temporary number. Once synchronized, Archipad automatically assigns their final number.

Multiple observations can be created at the same location whenever different Work Packages or different types of work need to be tracked independently.

7.4 Updating Observations

Observations evolve throughout the project.

Their details are displayed in the observation editor, where you can review and update:

- Work Package
- Description
- Due date
- Phase
- Status
- Photos
- Comments
- History

As work progresses, observations can be moved to another location on the same plan whenever necessary.

During follow-up meetings, previously created observations are automatically locked. This prevents accidental changes to their location, description, and Work Package while still allowing their status to be updated, comments to be added, and additional photos to be attached.

Unlock an observation whenever these protected fields need to be modified.

When several observations are selected, the observation editor displays a value only if every selected observation shares it. Editing a field updates every selected observation, making it easy to assign the same Work Package, due date, or status to many observations at once.

Remember

The plan always remains the reference for locating and reviewing observations, even when they are edited from the Observation Table.

7.5 Observation Lifecycle

Every observation follows the same lifecycle.

New observations are created with the status **Open**.

Once the responsible contractor has completed the work, the observation is marked **Solved**.

After verification, the work is either:

- accepted and marked **Closed**, or
- rejected and marked **Rejected**.

A rejected observation remains in that state until the work has been corrected and marked **Solved** again.

Depending on their permissions:

- Contractors can mark observations as **Solved**.
- Authorized users can mark observations as **Rejected** or **Closed**.

Observation status is reflected throughout Archipad using colors, making overdue or completed work immediately visible on plans, in the Observation Table, and on the Dashboard.

Observation colors can provide an immediate indication of status:

Status color legend

	**Blue**	Open and on time
	**Orange**	Open and approaching due date
	**Red**	Open and overdue
	**Purple**	Solved
	**Black**	Rejected
	**Gray**	Closed

Closed observations are displayed with strikethrough text. You can also choose to always display observations in red or based on the color you assigned to each work package.

7.6 Photos, Sketches and Comments

Observations provide a complete history of project follow-up.

Photos can be added when an observation is created or at any later time. Sketches can be drawn directly on photos or on plans to highlight specific details.

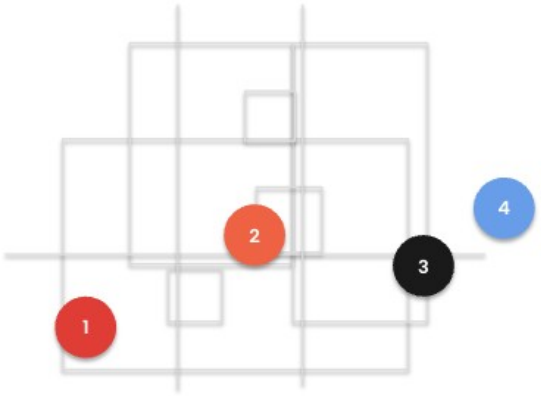
Comments document discussions, progress, and decisions. Each status change can also include comments and supporting photos.

Every addition is recorded in the observation history, allowing everyone involved in the project to review how the work evolved over time.

CHAPTER

08

Remarks



8. Remarks

Remarks record information that is not associated with a specific location on a plan.

They are typically used to document meeting discussions, decisions, administrative follow-up, and actions that concern the project as a whole rather than a particular drawing.

Together with observations, remarks provide a complete record of project follow-up throughout the construction process.

8.1 Understanding Remarks

A remark records information that needs to be remembered, discussed, or followed up.

Typical examples include:

- Administrative requests
- Contractual follow-up
- Material approvals
- Technical decisions
- Coordination notes
- Actions assigned to Project Contacts or Work Packages

Unlike observations, remarks are not attached to a plan. They are organized into **Chapters** and **Subchapters**, allowing you to structure meeting notes in the way that best matches your projects.

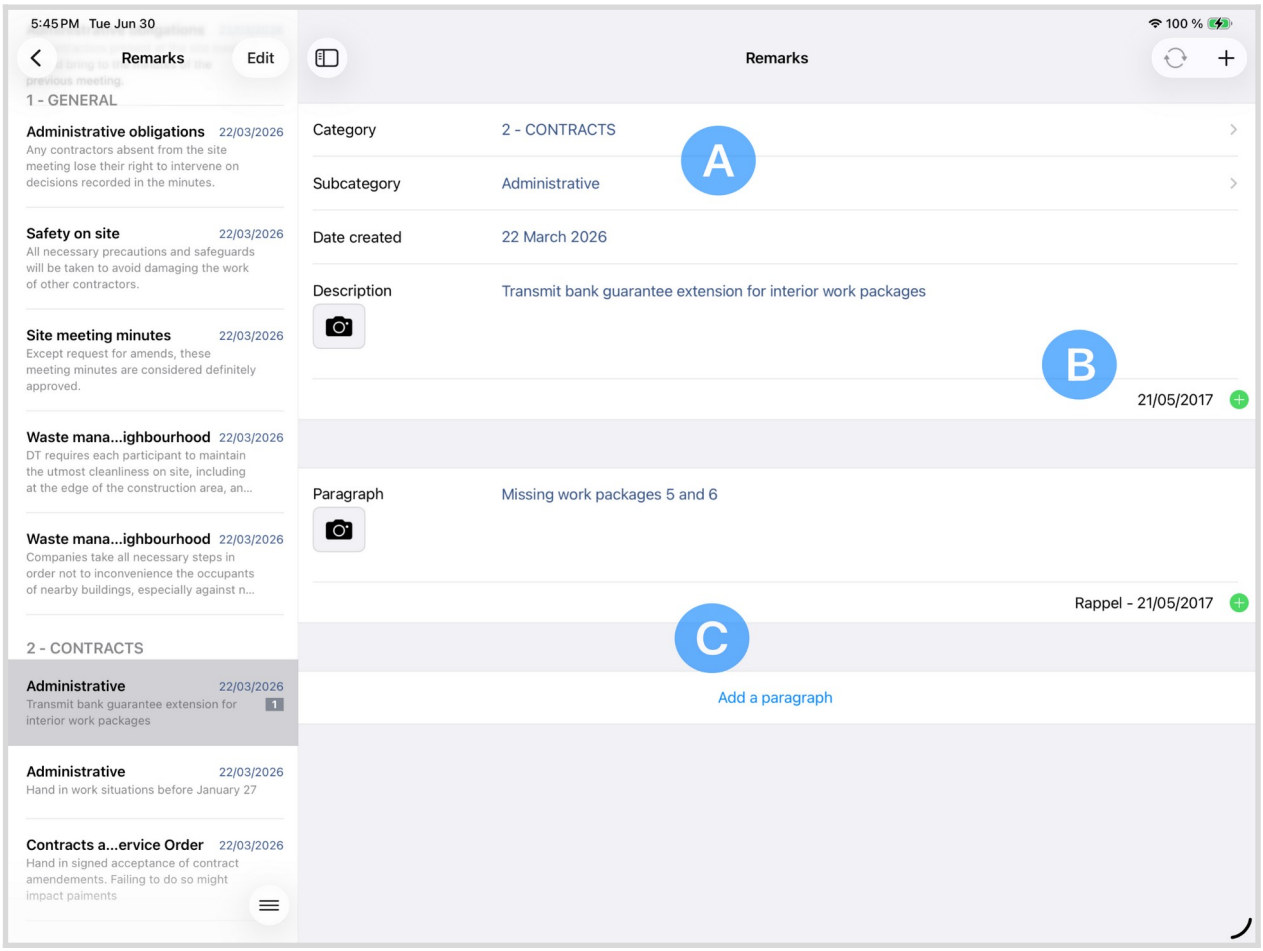


Figure 8-1. Remarks

A	**Chapter and subchapter**
B	**Remark details**
C	**Paragraphs**

8.2 Organizing Remarks

Remarks are grouped into Chapters and Subchapters.

You are free to define the structure that best suits your projects.

Typical Chapters include:

- General
- Administrative
- Contracts
- Studies
- Work

Chapters and Subchapters can be renamed, reordered, and reorganized at any time.

Because every project is different, Archipad does not impose a fixed structure.

8.3 Creating Remarks

Create a remark whenever information needs to be recorded without referring to a plan.

A remark can contain:

- Chapter and Subchapter
- Description

- Photos and sketches
- Project Contacts and Work Packages concerned
- Due date
- Status
- Display style for reports

Remarks are available to everyone with permission to manage project follow-up.

Work Packages do not interact directly with remarks. They receive them only through project reports.

8.4 Following Up Remarks

Remarks evolve throughout the project.

Each remark can contain one or more **paragraphs**.

Paragraphs have exactly the same properties as the parent remark and are used to record follow-up discussions, decisions, and progress over time.

Use paragraphs to record how a discussion evolves over time while keeping related information together. Each paragraph has the same properties as the parent remark, allowing you to add decisions, actions, photos, sketches, and follow-up information as the project progresses.

Closing a remark automatically closes all of its paragraphs. Closing every paragraph individually does not close the parent remark.

Unlike observations, remarks are never locked. They remain fully editable throughout the project.

8.5 Remarks in Reports

Remarks are presented in reports exactly as they are organized in Archipad.

Reports group remarks by Chapter and display them in the order you define.

Paragraphs appear indented beneath their parent remark, making the relationship between the original discussion and its follow-up immediately clear.

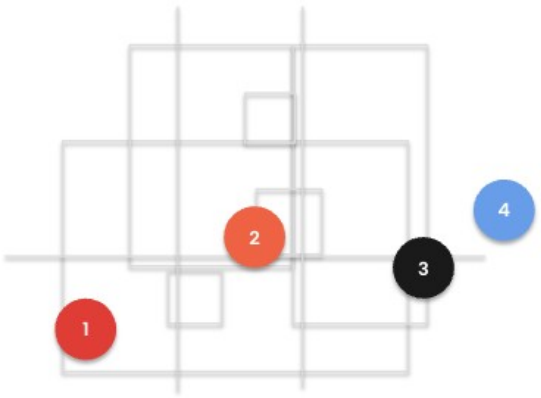
Closed remarks remain visible in reports using strikethrough formatting, preserving the complete history of project decisions.

Photos and sketches attached to remarks can also be included in the report's annexes, providing additional context whenever required.

CHAPTER

09

Reports



9. Reports

Reports bring together the information recorded throughout the project and present it in a format that can be shared with others.

Generate reports whenever you need to communicate the current state of the project. In practice, reports are most often produced after a site visit, meeting, or handover inspection, when the information recorded during the review is ready to be shared.

9.1 Understanding Reports

Reports are assembled from the information already stored in Archipad.

Depending on your needs, a report can present:

- The current state of the project.
- The information associated with a particular meeting.
- Information for selected Work Packages.
- Information for selected plans.
- Information matching specific observation or remark filters.

Every report is built from configurable sections, allowing you to generate documents that match the purpose of each project review.

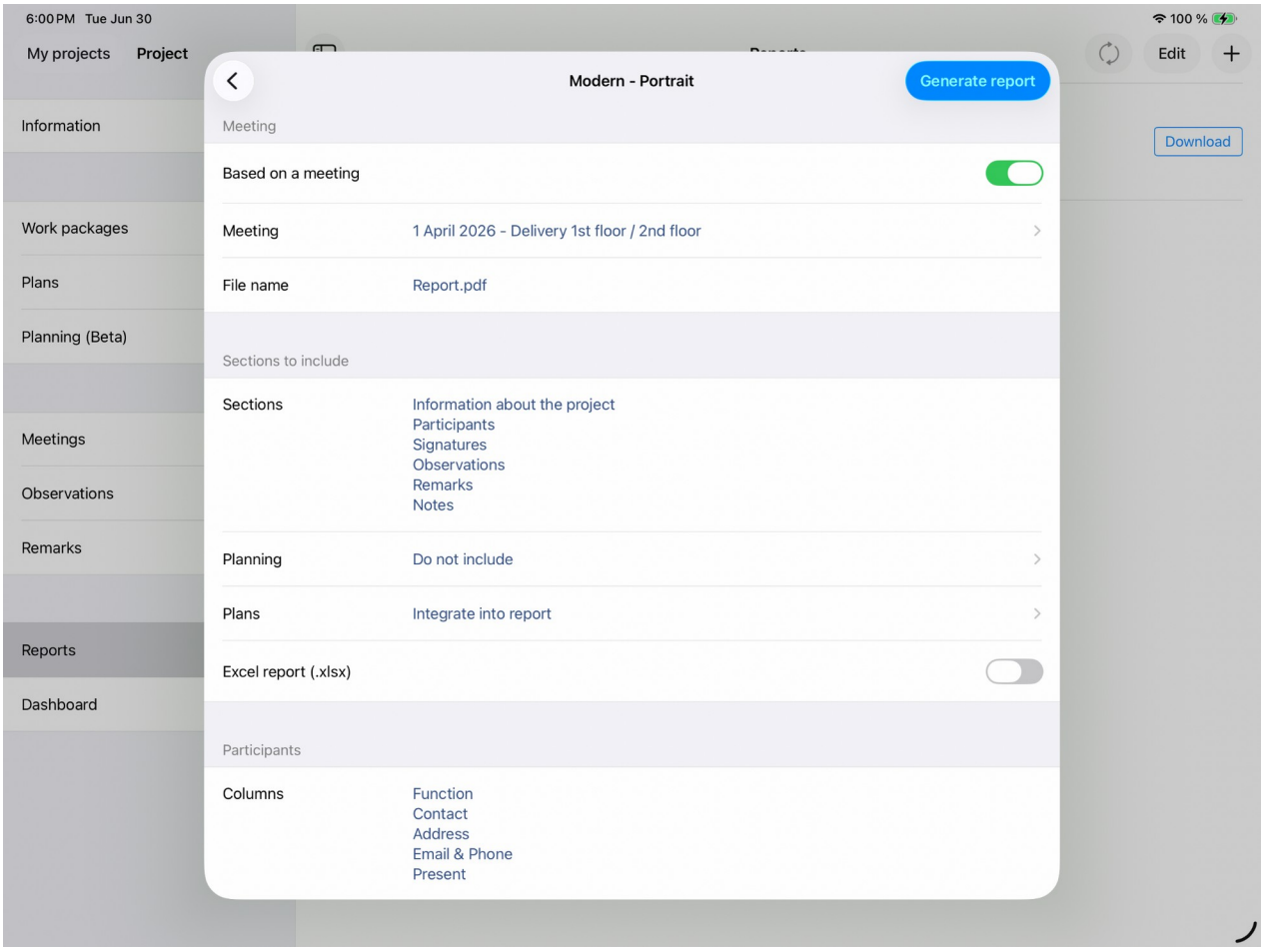


Figure 9-1. Report Configuration

9.2 Generating Reports

Generate a report at any time.

Reports can be produced as:

- A PDF document for communication and distribution.
- An Excel workbook for analysis, filtering, or integration with external systems.

Report settings are remembered between generations, making it easy to produce consistent reports throughout the project.

> **Remember**
> Reports always reflect the current state of the project. Regenerating a report at a later date includes the latest project information, not the information that existed when the report was originally generated.

9.3 Configuring Reports

Each report is assembled from independent sections.

Typical sections include:

- Project Information
- Meeting participants
- Signatures
- Observations
- Remarks
- Meeting notes
- Annexes

Each section can be included or omitted independently and provides its own configuration options.

For example, observation sections can be filtered by Work Package, plan, phase, or status, while remark sections can display all remarks or only those that remain active.

Observation lists can also be customized by choosing which columns are displayed, how observations are grouped, and how they are sorted.

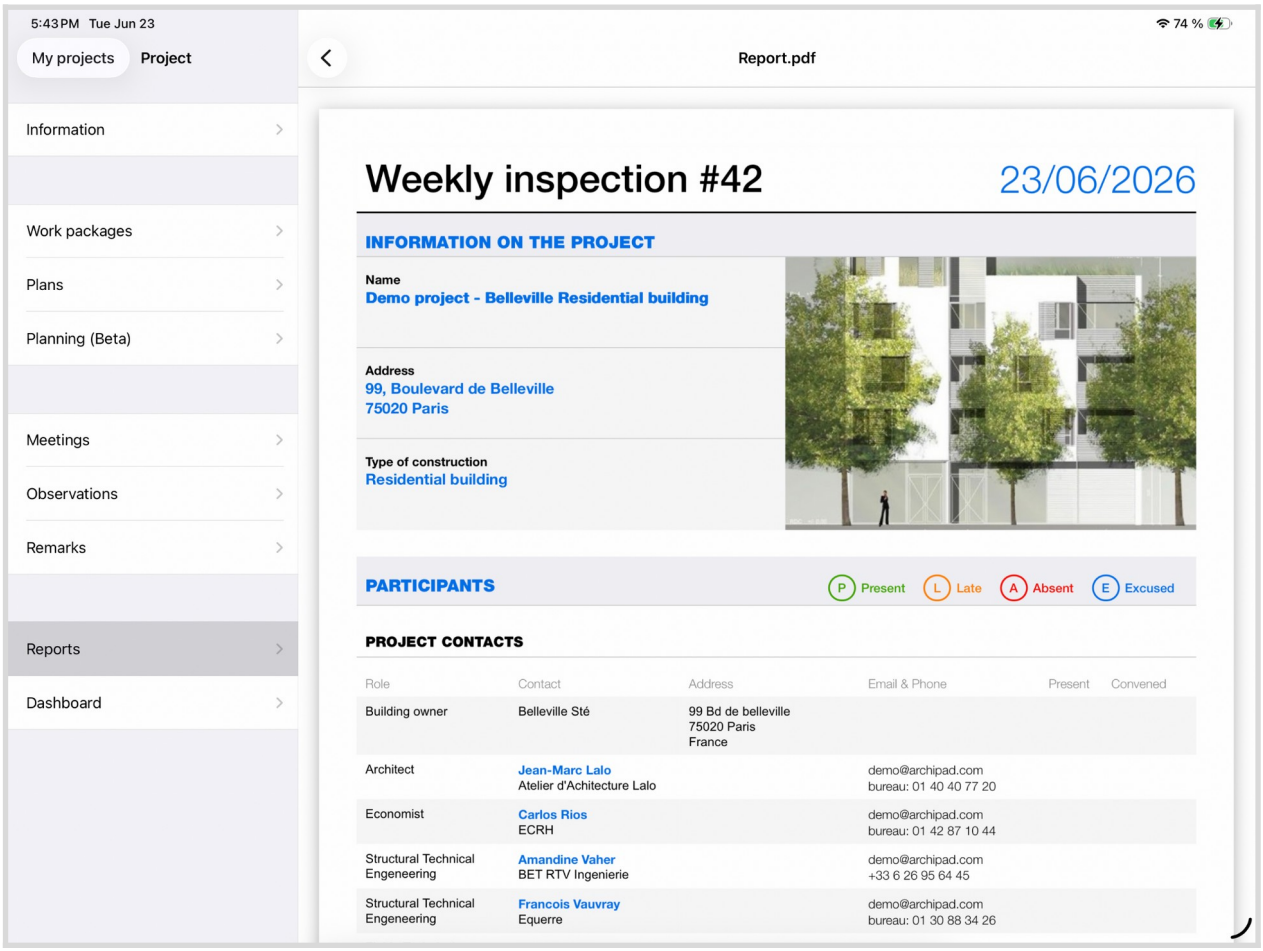
This flexibility allows the same project information to be presented in different ways depending on the purpose of the report.

9.4 Report Design and Distribution

Choose one of the available report designs and adapt it to your company's visual identity.

Reports can include a company letterhead or stationery, while preserving configurable header and footer areas reserved for your own branding.

Once generated, reports can be previewed before being distributed.



From iPhone and iPad, reports can be sent directly to selected recipients by email. If a report is too large to send as an attachment, Archipad uploads it to the cloud and sends a secure download link instead.

From the web application, generated reports remain available for preview and download.

When generating one report per Work Package, Archipad automatically distributes each report to the responsible contact for the corresponding Work Package.

9.5 Excel Export

Excel exports provide access to the project's data in a spreadsheet format.

The workbook contains separate worksheets for:

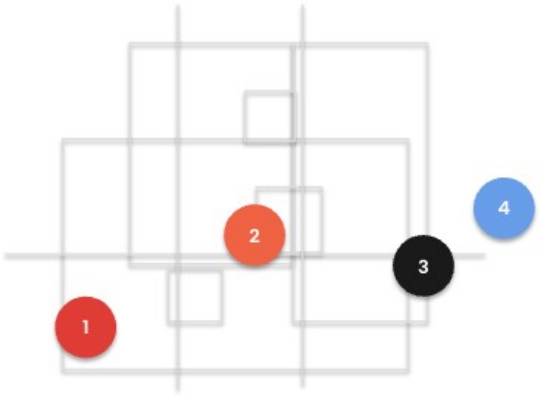
- Project Information and Project Contacts
- Work Packages
- Observations
- Remarks

Excel exports are particularly useful for creating custom reports, performing additional analysis, or transferring project information into other business systems when APIs are not used.

CHAPTER

10

Dashboard



10. Dashboard

The Dashboard highlights where your attention is needed.

It provides an immediate overview of project follow-up by summarizing observations from different perspectives, making it easy to identify priorities, monitor responsibilities, and understand the current state of the project.

10.1 Understanding the Dashboard

The Dashboard presents a snapshot of the current project.

Rather than listing individual observations, it summarizes them using charts that reveal where work remains to be completed and how observations are distributed across the project.

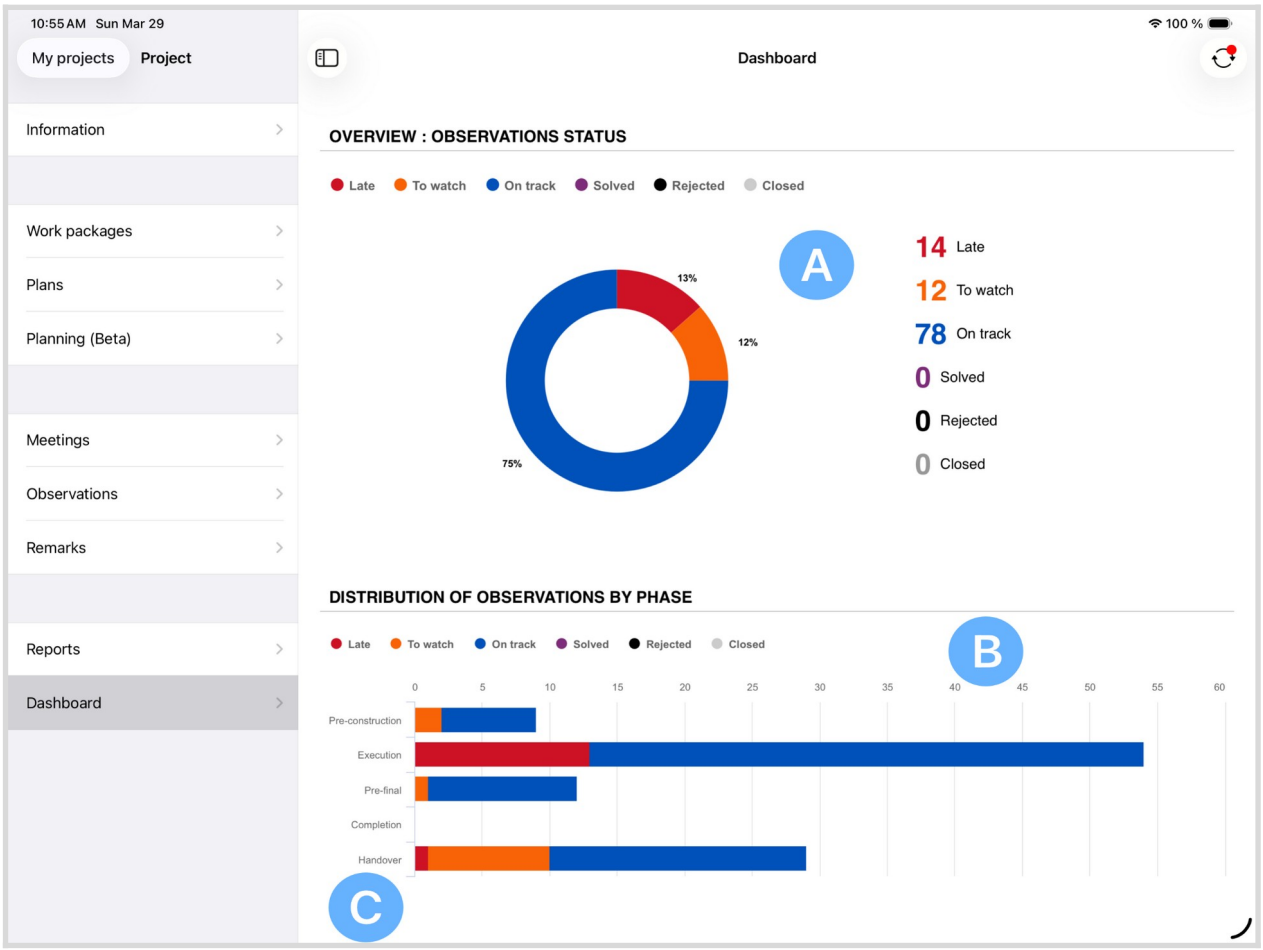


Figure 10-1. Dashboard

A	**Observation status overview**
B	**Distribution charts**
C	**Drill-down navigation**

10.2 Reviewing Project Follow-Up

Begin with the observation status overview.

The circular chart summarizes the number of observations that are:

- On track
- To monitor

- Overdue
- Solved
- Rejected
- Closed

This provides an immediate understanding of the project's current state and helps identify where attention is required.

Additional charts organize the same information from different perspectives, including:

- Work Packages
- Regions
- Plans
- Meetings
- Project phases

Together, these views make it easy to understand how observations are distributed throughout the project.

10.3 Exploring the Project

Select any section of a chart to focus on a particular part of the project.

Every chart updates automatically to display information for the selected subset, allowing you to progressively narrow your analysis without leaving the Dashboard.

For example, selecting the **HVAC** Work Package immediately updates the other charts to show only observations related to that Work Package.

This makes it easy to move from a global overview to a specific area requiring attention.

10.4 Monitoring Progress

The meeting chart provides a historical view of project activity.

Each bar represents one calendar week and summarizes the observations that changed during that period, whether the changes were made during a meeting or independently.

The different colors show how observations evolved throughout the week, including:

- On track
- To monitor
- Overdue
- Solved
- Rejected
- Closed

This view provides a simple way to understand how project activity evolves over time while keeping the overall chart easy to read.

10.5 Using the Dashboard

Review the Dashboard regularly to identify priorities before visiting the site or preparing a project review.

In practice, most users begin by checking the overall status of the project, then drill down into the Work Packages, Regions, or plans that require attention.

The Dashboard does not replace the Plan workspace or the Observation Table. Instead, it helps you decide where to focus your efforts before continuing your project follow-up.