SITE CAPTURE

Web App Training for Vendor Company Admins

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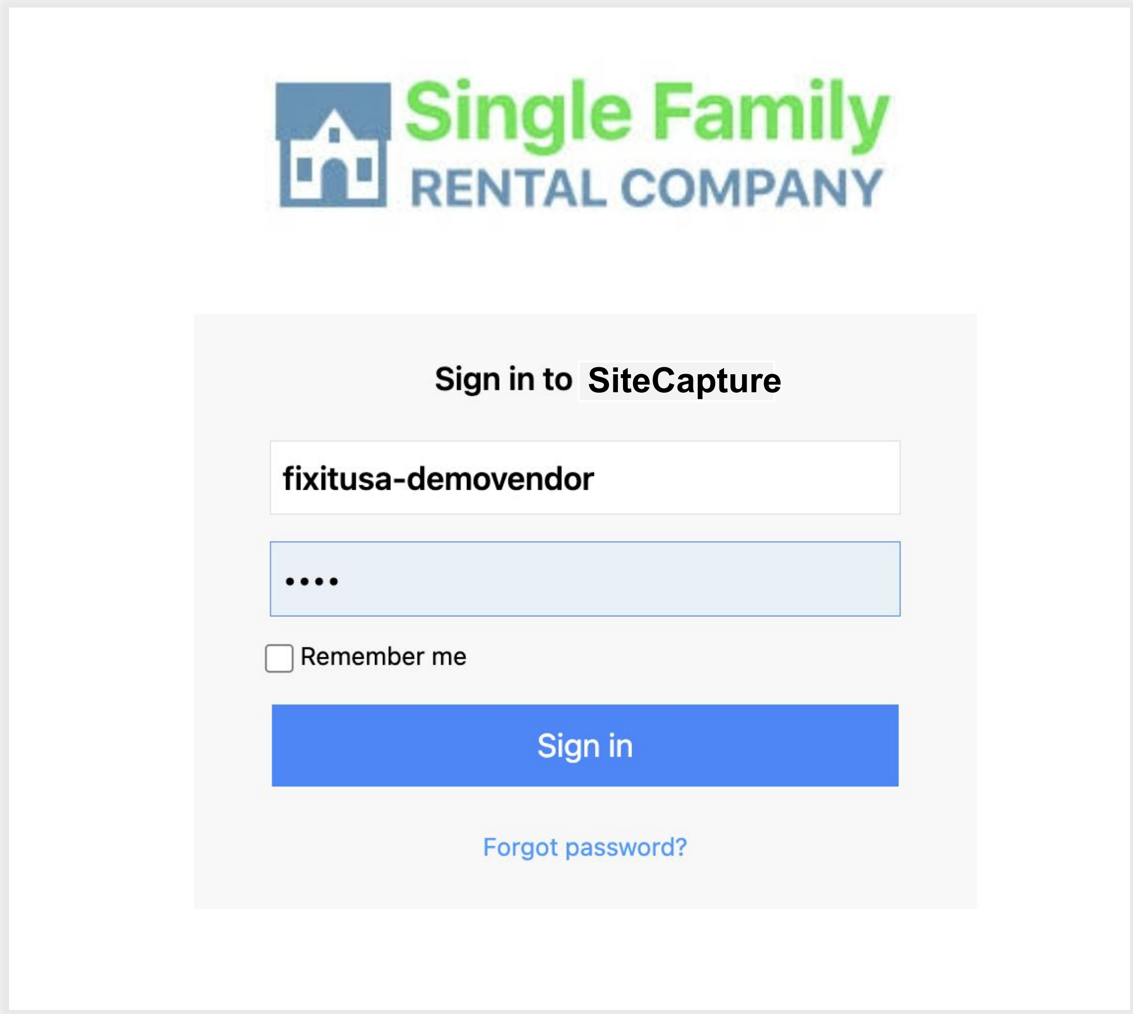
Logging In

Go to the link provided to you (or app.sitecapture.com) and log in using the username and password provided to you.

- If you do not remember your password, click the blue “Forgot Password” link to reset your password.

- If you do not know your username, please reach out to the company that has assigned work to you in FotoNotes.



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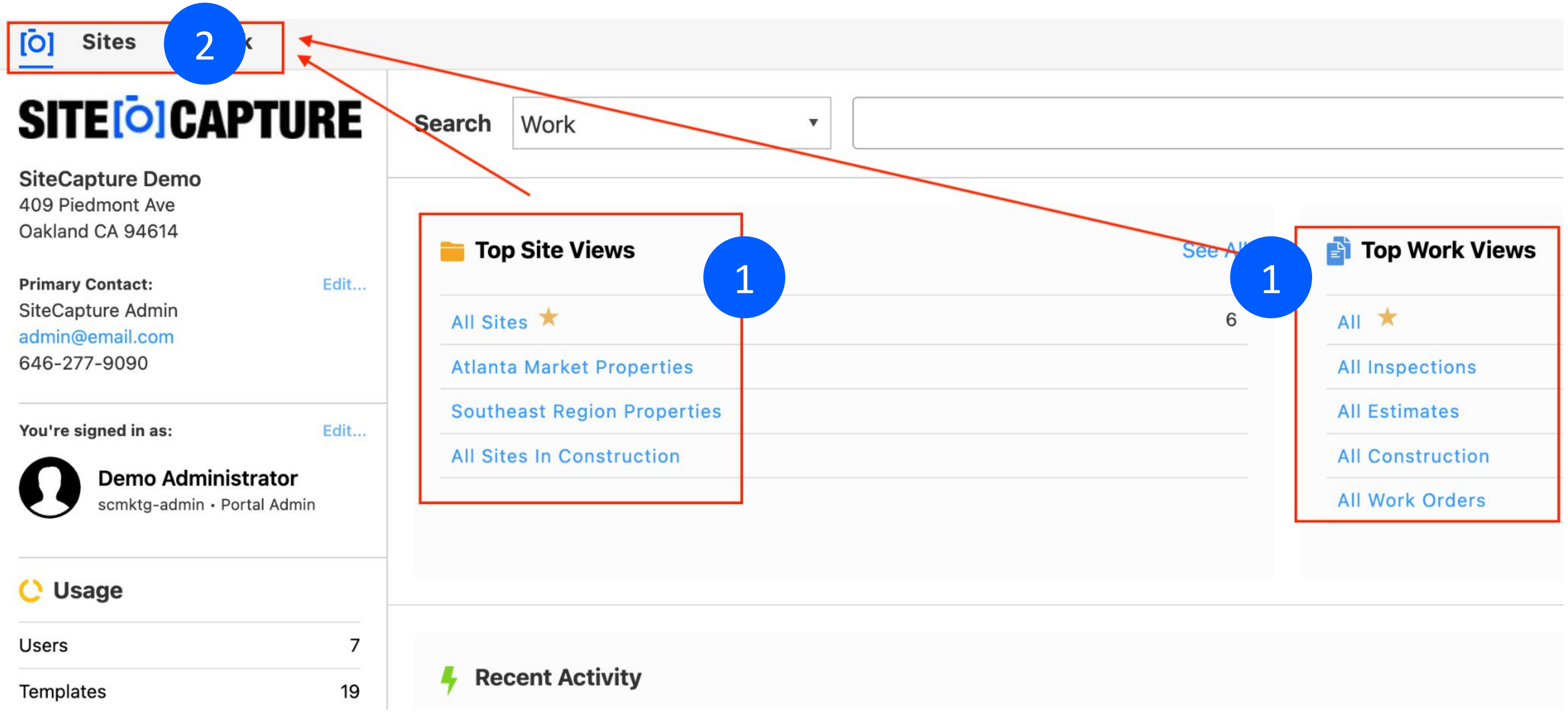
Dashboard, Searches and Views

The first page you see in the web app will be the dashboard.

- Click on the Saved View (1) that has been created for you or click the link in the top toolbar (2).



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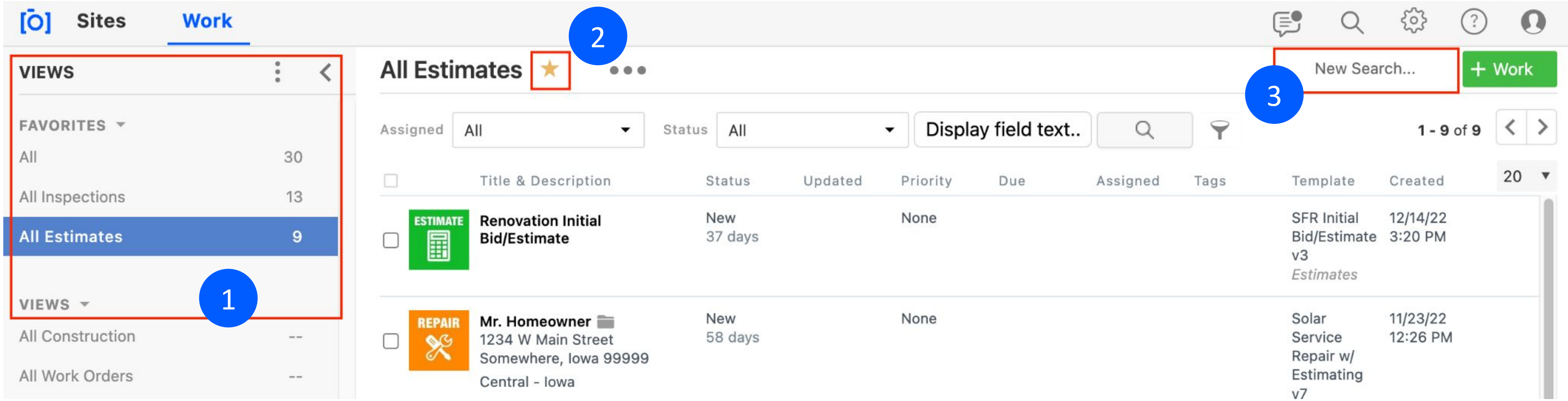
Searches and Views

After clicking on the Saved View or Work link, you will see a list of work assigned to you and Saved Views on the left.

- Saved Views are groups of work created in a search using unique criteria (1).
- To add a view to **Favorites**, click the star icon next to the view name (2).
- Click New Search on the right to create a new view (3).

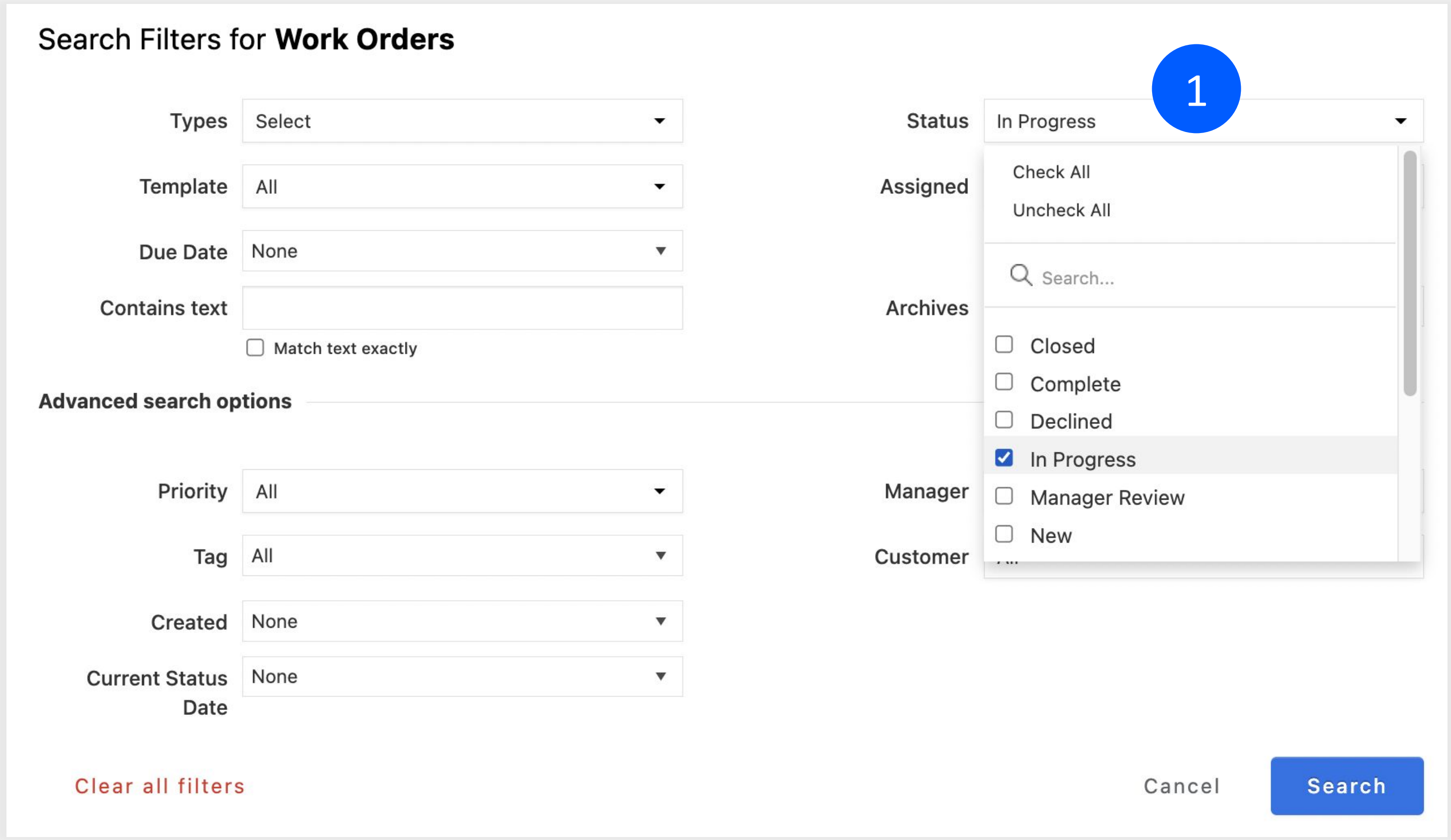


Searches and Views

On the next screen, select the criteria for your search.

For example, you can select all work with a status of In Progress by selecting ”In Progress” in the Status dropdown and clicking search (1).

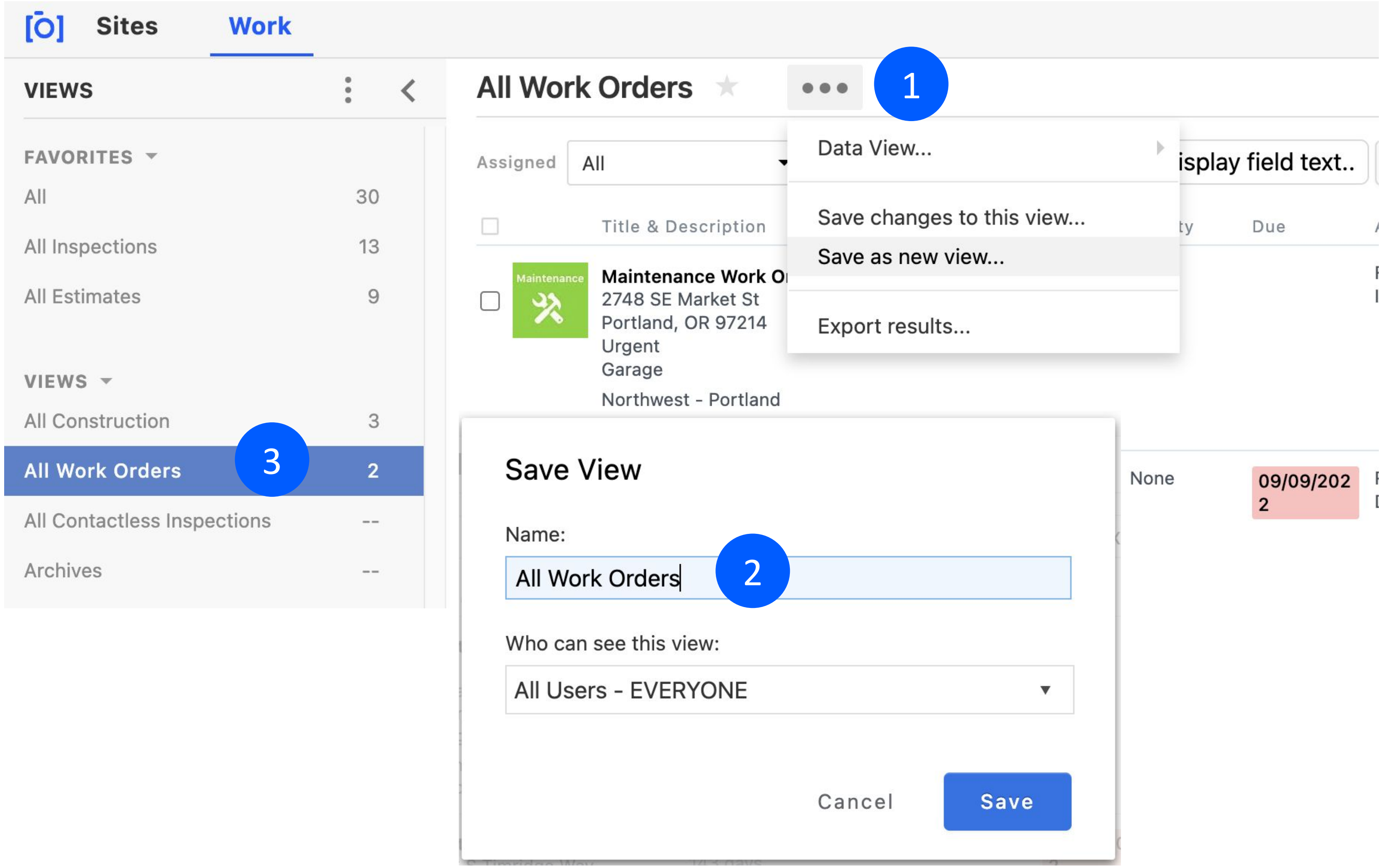
You may also want to select specific types of work, due dates or work created during a specific timeframe.



Searches and Views

After clicking Search, a list of work meeting that criteria will appear.

- Save the search as a saved view by clicking the three dots at the top and selecting Save as new view… (1)
- Give your Saved View a name (2).
- The new Saved View will appear in the list on the left (3).

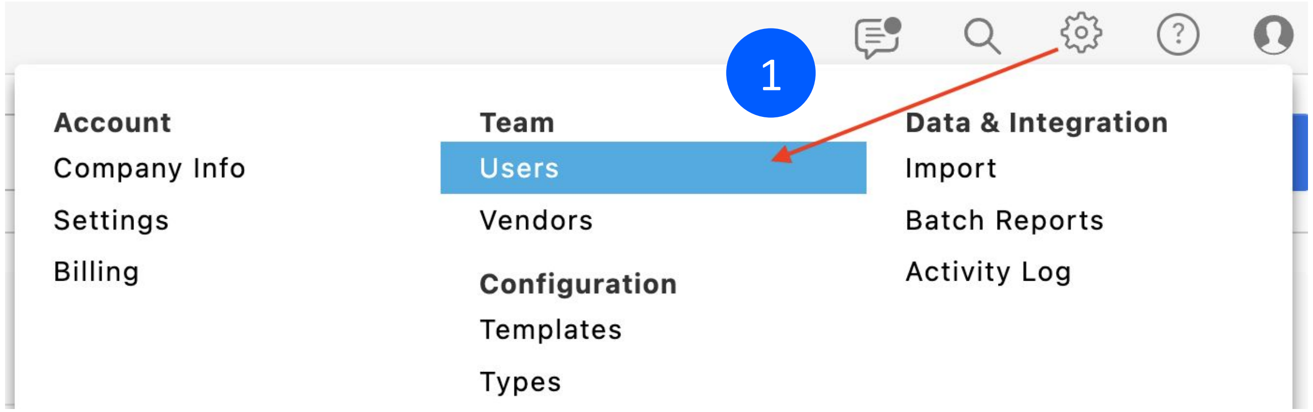


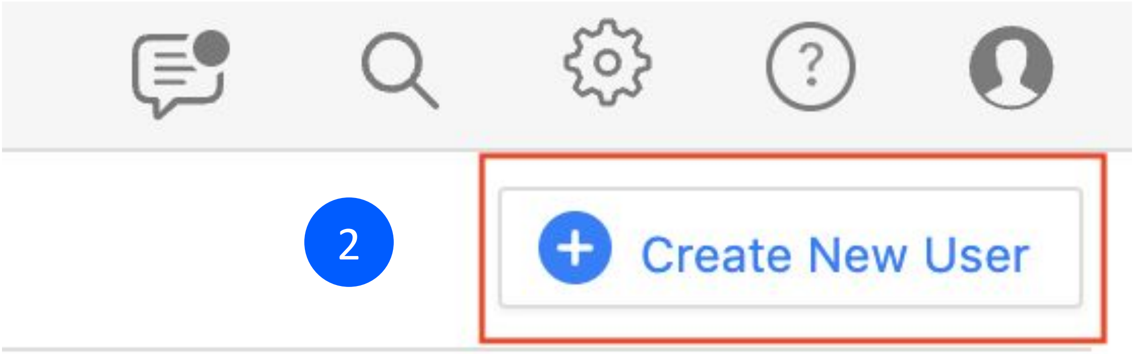
Creating a Field User

The company assigning work to you in SiteCapture will provide you with **Vendor Basic Admin** credentials. When you log in, you will have access to all work assigned to you by that company.

As a Vendor Basic Admin, you can set up additional field users to sub-assign work.

- To create a user, click on the **admin gear** and select **Users** (1).
- On the User page, click **Create New User** and fill in the information (2).





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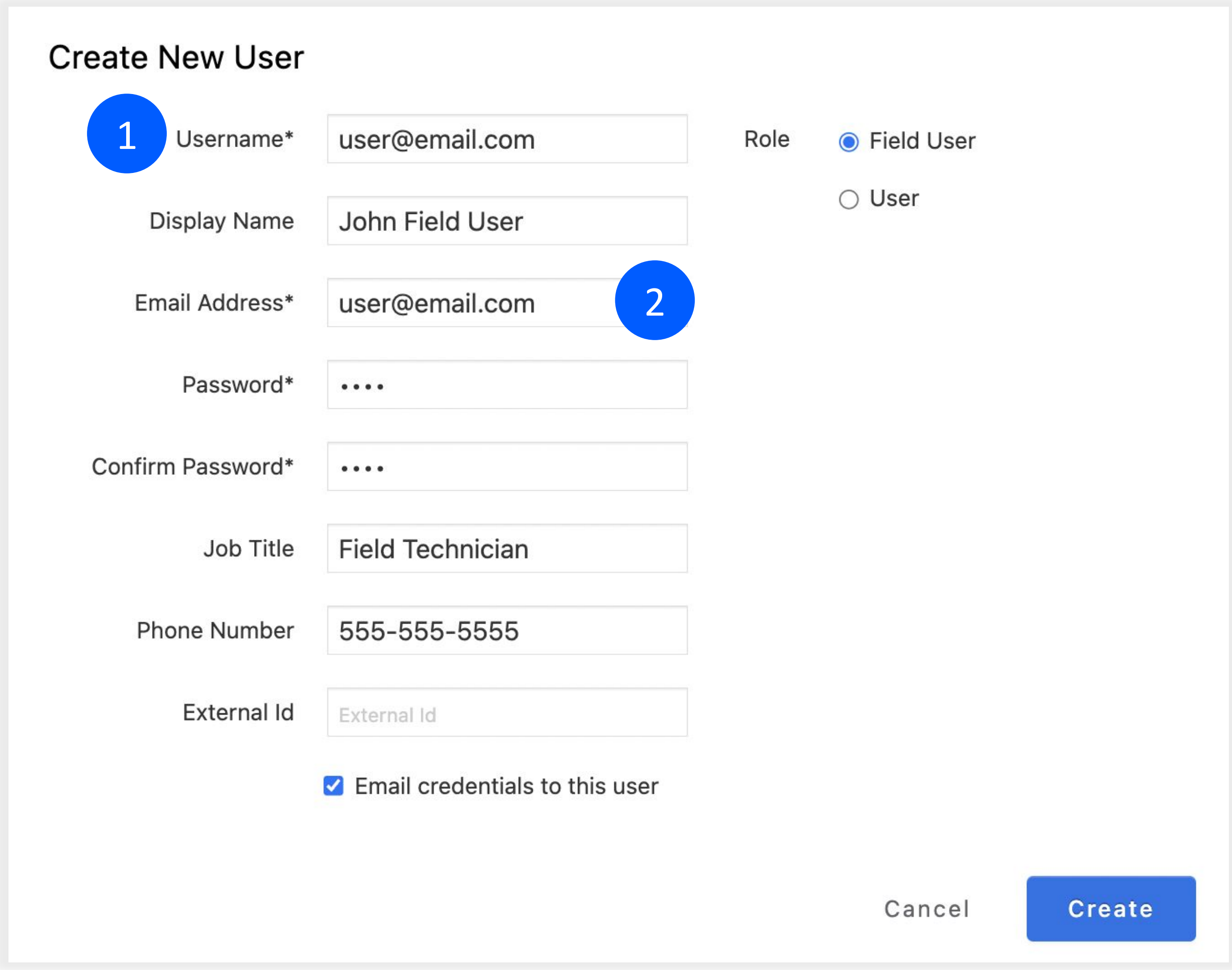
Creating a Field User

- The user role will be Field User.

- **Usernames within SiteCapture must be unique**. We recommend using the user's email address. Enter a unique password. (The user can change it later with the forgot password link) (1).

- Enter the user's email and any other information you have (like job title, phone number) and **Click Create** (2).

You can now manage this user from the list on the User page.



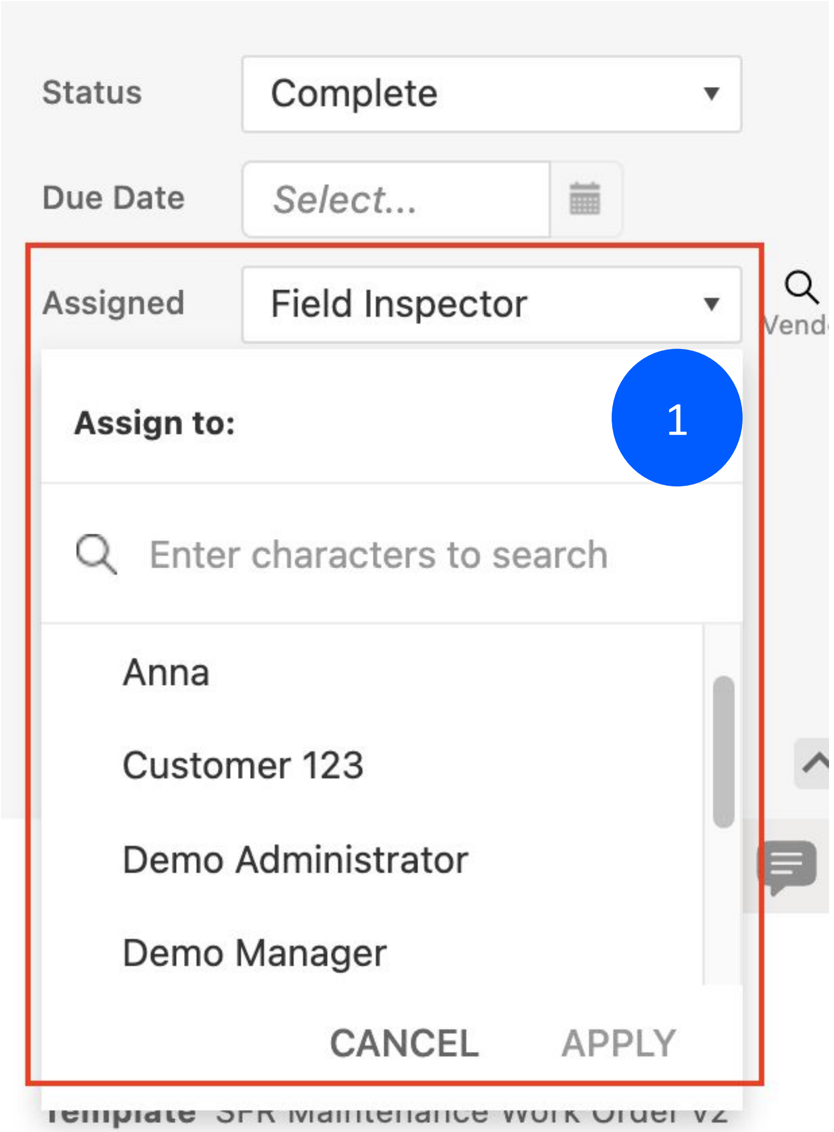
Sub-Assigning Work to a Field User

To sub-assign work with a user, go to a project you would like to assign.

- In the Assigned dropdown, select the user you want to assign the work to and click Apply (1).

When a user you have created and sub-assigned work to signs in, ***they will only see work that has been assigned to them.***

NOTE: You can assign work to a single user, but work can be shared with as many users as needed.



Sharing Work

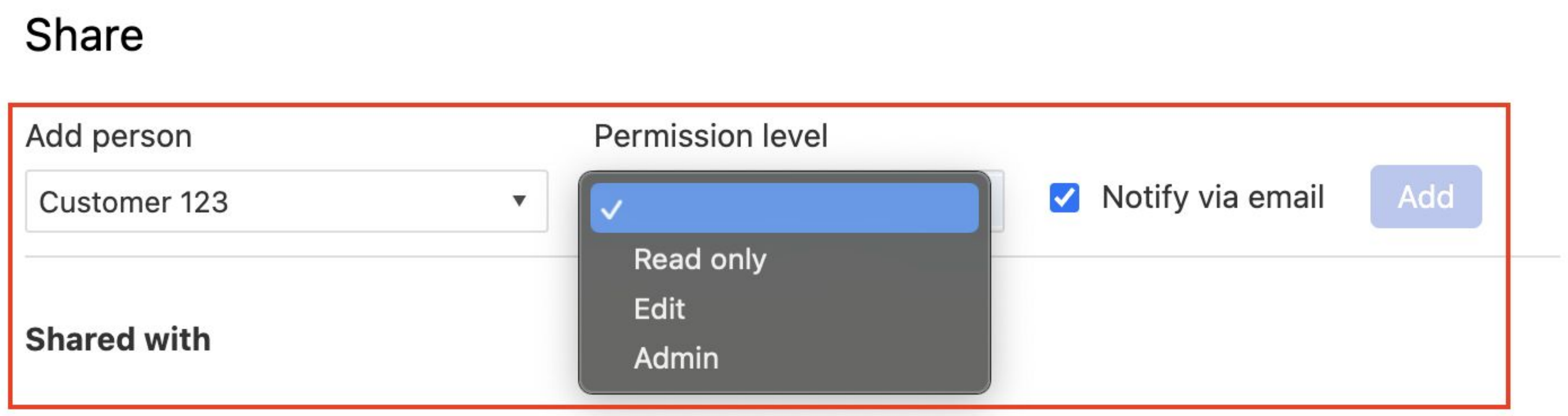
Share work with additional users, so more than one user can work on the project.

- Click the (•••) menu and select **Share.** A modal will open showing a list of users sharing this project.
- Click the **Add person** dropdown to select a user.
- Click the **Permission level** dropdown to select a permission. Choose:

  Read Only if you only want them to have access to see and review the work.

  Edit to give them access to answer questions, edit data or add photos.

- Check **Notify via Email** to send an email that they have been granted access.
- Click **Add** to share access with the user.



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Additional Support

Visit our support site for additional support articles and videos:
https://sitecapture.zendesk.com

For technical support, email support@sitecapture.com