



Documentation for the SiteCapture Aurora Integration

Introduction

This document provides instructions and guidelines for working with and configuring the Beta of the SiteCapture Aurora integration. This integration allows for the initiation of a SiteCapture Site Survey from the Aurora app, the pulling of relevant data and photos from Aurora into that Site Survey, and the automatic pushing of data and photos back to Aurora when the SiteSurvey is completed.

Using an Aurora Compatible Template

One key aspect of the integration is using a SiteCapture template that is Aurora compatible. That means it has certain sections, field groups, fields, and field options that must meet the requirements of the integration. There are three ways to accomplish this:

- 1. Use the default Aurora Site Survey template**

This will be provided to you by the SiteCapture team. You can use it out of the box and it's the simplest way to get started.

Note: This template was last updated on 8/6/2024. Please reach out to your SiteCapture Customer Success Representative to request this template.

- 2. Use the default Aurora Site Survey template with your own customizations**

In this approach, you use the default Aurora Site Survey template as a starting point and add your own custom sections and fields. If you don't make any changes to the existing section keys, field groups, or fields, only minimal configuration will be required.

Note: This template was last updated on 8/6/2024. Please reach out to your SiteCapture Customer Success Representative to request this template.

3. Modify an existing template and make it Aurora compatible

This approach makes sense if you have a well established template and you prefer to continue using it. This approach is much more involved and the details are outlined below. We recommend that you work with the SiteCapture Customer Success team who can assist with this process. We recommend that you create a copy of your existing template and make changes to that. Be sure to test it thoroughly before using it for actual Site Surveys. The default Aurora Site Survey template provides an example of how to make your sections, field groups, and fields compatible.

Note: This template was last updated on 8/6/2024. Please reach out to your SiteCapture Customer Success Representative to request this template.

Modifying a template to make it Aurora compatible

Initial Integration to Get Started

If you have an existing Site Survey template, it's simplest to first start with a "PDF Only" integration. With the PDF Only integration, you only need to add the two fields in the "Required Fields" section to your template. Once the Aurora integration is configured, and the Site Survey has the Aurora Project Id set, the PDF of the SiteCapture Site Survey including all photos and data will be attached automatically in Aurora on the project for your design/engineering team to use

Full Integration

Once you have the Initial Integration working, you can incrementally make changes to your template to support the rest of the Aurora integration. The Aurora Full Integration requires certain fields and field types to be present in the SiteCapture template for the integration to work correctly. The following tables document these fields, sections, and groups. The tables are broken up into 4 categories.

- Aurora Project, Site Survey and Design Section - Data flowing from Aurora to SiteCapture.

- Electrical Section - Data flowing from SiteCapture Electrical Section to Aurora
- Subpanel Section - Data flowing from SiteCapture Subpanel Group to Aurora
- Roof Section - Data flowing from SiteCapture to Aurora. These are the default values used in mounting planes.
- Mounting Plane Section - Data flowing from SiteCapture Mounting Plane Group to Aurora

Unless specified otherwise, required means the field must exist in the template and be marked as required. Please note that SiteCapture comments are not pushed to Aurora.

Aurora Project, Site Survey and Design Section

This section includes the data that is coming from Aurora into the SiteCapture project when it is created.

Required Fields

The following table documents the required fields for data that is coming from Aurora. Note when the integration originates from SiteCapture some of these fields will be blank.

Aurora name	Required	SiteCapture Default Key	SiteCapture Type	Selection Options	Description
Project Id	X	sc_aurora_project_id	Text		This field is used to store the id of the project entity that is created in the Aurora system. When the integration originates from SiteCapture this field will need to be entered manually. Note this field mapping cannot be changed

Site Survey Id	X ¹	sc_aurora_site_survey_id	Text		This field is used to store the id of the site survey entity that is created in the Aurora system. Note this field mapping cannot be changed.
----------------	----------------	--------------------------	------	--	---

¹ Site Survey Id is only required to exist in the template. It does not need to be marked as required in the template itself. When the integration originates from SiteCapture this field will initially be blank but the integration will populate it after the first sync to Aurora.

Optional Fields

The following table documents optional fields that are coming from Aurora into SiteCapture when the integration originates from Aurora. When the integration originates from SiteCapture these fields can be ignored.

Aurora name	Required	SiteCapture Default Key	SiteCapture Type	Selection Options	Description
Design Image		sc_aurora_design_image	Image		This field is used to store the design image that is created in the Aurora system. Note this field mapping cannot be changed. If this field is not defined the Aurora design image will not be stored with the SiteCapture project.
Design Id		sc_aurora_design_id	Text		This field is used to store the id of the design entity that is created in the Aurora system. Note this field mapping cannot be changed.
Project Name		sc_aurora_project_name	Text		The name of the project in the Aurora system.
Customer Salutation		sc_aurora_customer_salutation	Text		The salutation of the homeowner in the Aurora system.
Customer First Name		sc_aurora_customer_first_name	Text		The first name of the homeowner in the Aurora system.
Customer Last Name		sc_aurora_customer_last_name	Text		The last name of the homeowner in the Aurora system.

Customer Phone		sc_aurora_customer_phone	Text		The phone number of the homeowner in the Aurora system.
Project Address		sc_aurora_project_address	Text		The full address of the project in the Aurora system.
Project Type		sc_aurora_project_type	Text		The type of the project in the Aurora system. Residential/Commercial.

Electrical Section

This section is the mapping of the electrical site survey data from SiteCapture to Aurora. Any photos added to any field in this section will be uploaded to Aurora.

Aurora Name	Required	SiteCapture Default Key	SiteCapture Type	Selection Options	Description
Electrical Section Key		sc_electrical	Section		The template section key for the electrical data.
Main Panel Location		sc_main_panel_location	Selection	north_interior, north_exterior,	The location of the main panel. If this field is not defined a

				south_interior, south_exterior, east_interior, east_exterior, west_interior, west_exterior, ne_interior, ne_exterior, nw_interior, nw_exterior, se_interior, se_exterior, sw_interior, sw_exterior, basement, garage, barn, pole_mounted, main_floor, roof_top	default value of "main floor" will be provided by the integration.
Main Bus Rating		sc_main_bus_rating	Decimal		The rating of the main bus (in amperes). If this field is not defined a default value of 0 will be provided by the integration.
Main Breaker Rating		sc_main_breaker_rating	Decimal		The rating of the main breaker (in amperes). If this field is not defined a default value of 0 will be provided by the integration.

Service Type		sc_service_type	Selection	single_phase_3_wire, single_phase_2_wire, 3_phase_4_wire, 3_phase_4_wire	The service type.
Feeder Type		sc_feeder_type	Selection	overhead, underground, pole_mounted, ct_cabinet, other	The feeder type.
Utility Meter Location		sc_utility_meter_location	Selection	north_interior, north_exterior, south_interior, south_exterior, east_interior, east_exterior, west_interior, west_exterior, ne_interior, ne_exterior, nw_interior, nw_exterior, se_interior, se_exterior, sw_interior, sw_exterior,	The location of the utility meter.

				basement, garage, barn, pole_mounted, main_floor, roof_top	
Existing Grounding		sc_existing_grounding	Selection	ground_rod, cold_water_pi pe, ufer, other	The method of the existing grounding.
Existing Grounding Location		sc_existing_grounding_locati on	Text		The location of the existing grounding.
Main Panel Manufacturer		sc_main_panel_manufacture r	Text		The manufacturer of the main panel.
Notes		sc_electrical_notes	Text, Long Text		Additional notes about the electrical data.

Subpanel Section (Field Group)

This maps subpanel data from SiteCapture to Aurora. Note this must be a group in SiteCapture. Any photos added to any field in the group will be uploaded to Aurora.

Aurora Name	Required	SiteCapture Default Key	SiteCapture Type	Selection Options	Description
-------------	----------	-------------------------	------------------	-------------------	-------------

Subpanel Group Key		sc_subpanels	Field Group		The template field group key for subpanels.
Location		sc_location	Text		The location of the main panel.
Disconnect Location		sc_disconnect_location	Text		The rating of the main bus (in amperes).
Bus Rating		sc_bus_rating	integer		The rating of the main breaker (in amperes).
Disconnect Size		sc_disconnect_size	integer		Size of the disconnect in amperes.
Notes		sc_subpanel_notes	Text, Long Text		Additional notes about the subpanel.

Roof Section

This maps roof data from SiteCapture to Aurora. These fields will be used as the defaults for data being passed into the Mounting Plane field group.

Aurora Name	Required	SiteCapture Default Key	SiteCapture Type	Selection Options	Description
Roof Type		sc_roof_type	Selection	composition_shingles, tile_flat_concrete, tile_s_concrete	The default roof type for mounting planes. This can be overridden at the mounting plane level.

Mounting Plane Section (Field Group)

This maps mounting place data from SiteCapture to Aurora. Note this must be a group in SiteCapture. Any photos added to any field in the group will be uploaded to Aurora.

Aurora Name	Required	SiteCapture Default Key	SiteCapture Type	Selection Options	Description
Mounting Plane Group Key		sc_mounting_planes	Field Group		The template field group key for mounting planes.
Pitch		sc_pitch	Decimal		The pitch of the mounting plane. If this field is not defined a default value will be provided by the integration.
Azimuth		sc_azimuth	Decimal		The azimuth of the mounting plane. If this field is not defined a default value will be provided by the integration.
Roof Type		sc_roof_type_override	Selection	composition_shingles, tile_flat_concrete, tile_s_concrete, tile_w_concrete, tile_slate, tile_clay, rolled_asphalt, metal_standing_seam, metal_corrugated, other	The roof type of the mounting plane. If data exists for this field it will override the default Roof Type in the Roof Section. If no Roof Type fields are defined in the template a default value will be provided by the integration.

Framing Type		sc_framing_type_override	Selection	trussed, rafters, other	The framing type of the mounting plane. If data exists for this field it will override the default Framing Type in the Roof Section. If no Framing Type fields are defined in the template a default value will be provided by the integration.
Rafter Size		sc_rafter_size_override	Selection	2x4, 2x6, 2x8, 2x10, 2x12, other	The rafter size for the mounting plane. If data exists for this field it will override the default Rafter Size in the Roof Section. If no Rafter Size fields are defined in the template a default value will be provided by the integration.
Rafter Spacing		sc_rafter_spacing_override	Decimal		The rafter spacing for the mounting plane. If data exists for this field it will override the default Rafter Spacing in the Roof Section. If no Rafter Spacing fields are defined in the template a default value will be provided by the integration.
Notes		sc_mounting_plane_notes	Text, Long Text		Any additional notes for the mounting plane.

PDF Report

All data and photos will be available in the PDF report that gets attached to the Aurora project. This includes all fields and photos that do not map directly to a field or photo area in the Aurora UI.