



Condition Survey

Mobile Web Application - User Guide

Concerto Support Services Ltd

Stuart Cripps

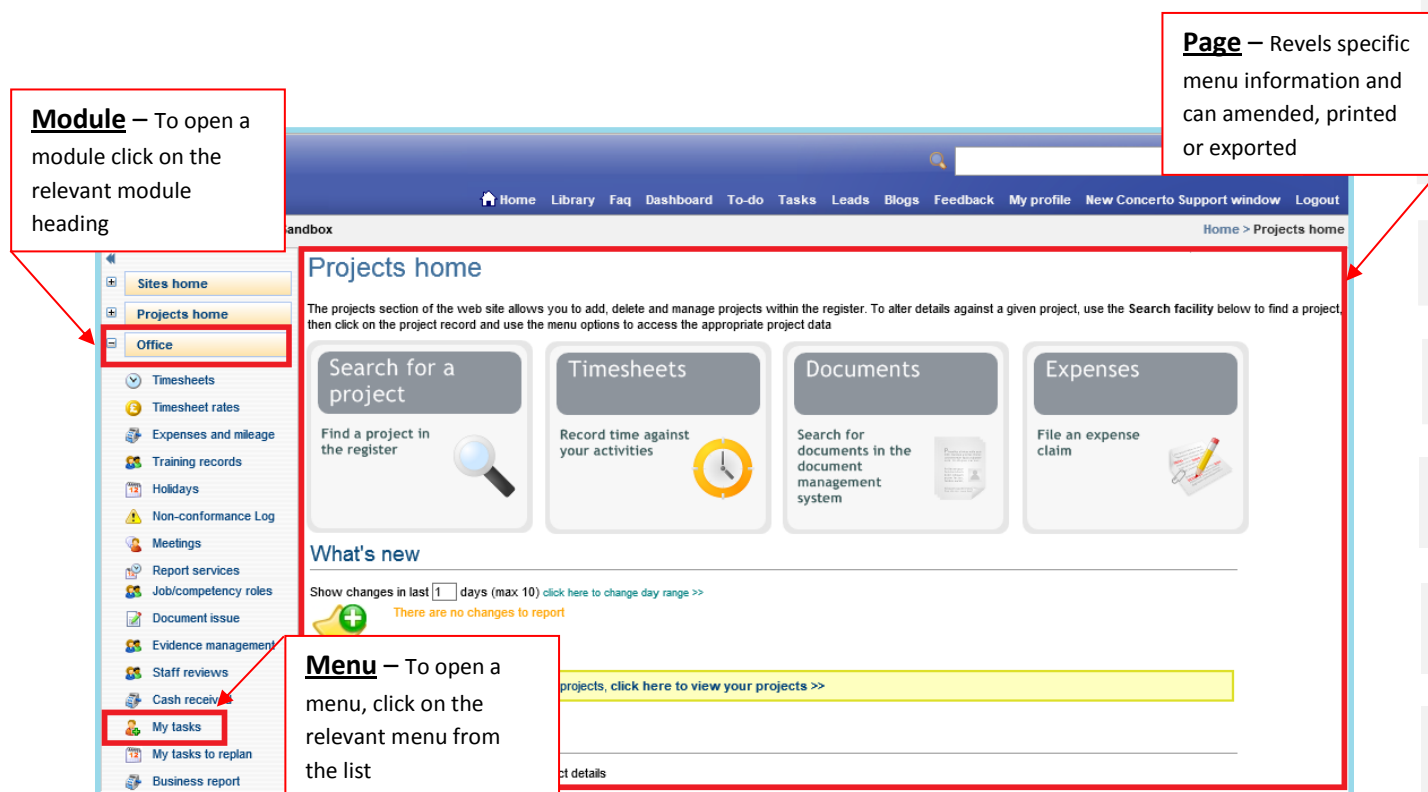
1/6/2014

Contents

Getting Started.....	2
Logging In	3
Assigning to your favourites	4
Condition Survey Web Application	5
Accessing the Condition Survey Web Application	6
Condition Survey Web Application – Process guide	7
Condition Survey Web Application – Download Survey data.....	8
Condition Survey Web Application – Completing Condition Surveys.....	10
Section 1 – Element	12
Section 2 - Condition.....	14
Section 3 - Works	15
Section 4 - Cost	16
Section 5 - Estimated Cost	17
Section 6 - Attachment – Optional.	19
Condition Survey Web Application – Upload Condition Survey Data.....	20
Condition Survey Web Application – Buttons.....	21
Receive Button.....	21
Send Button.	21
Back Button.....	21
Copy Button.	21
Paste Button.....	22
Menu Button.....	22
All Ok Button.....	22
Scroll Forwards and Backwards Buttons.....	22

Getting Started

The Concerto software navigation is made from three layers – Modules, Menus then Pages with the potential of multiple tabs linking pages together (see [figure 1](#)).



Module – To open a module click on the relevant module heading


Menu – To open a menu, click on the relevant menu from the list

Page – Reveals specific menu information and can amended, printed or exported

The screenshot shows the 'Projects home' page. The left sidebar contains a list of modules, with 'Office' and 'My tasks' highlighted. The main content area includes sections for 'Search for a project', 'Timesheets', 'Documents', 'Expenses', and 'What's new'. A yellow callout box points to a link in the 'What's new' section.

Figure 1 - Modules, Menus & Pages

NOTE:-



Page options may differ depending on your software configuration, administration rights and licencing agreements.

Logging In

1. Open your Internet Browser (Internet Explorer, Google Chrome, Safari, Firefox, etc.), then type into the address bar, your Concerto login address. (i.e. ABCCouncil@Concertosupport.co.uk)
2. Enter your **Concerto Login name** and **password** (this may differ from your normal PC Network login details).
3. Either press the **Enter/Return** key on your keyboard or select the **“Click here to login”** option.
4. If you are struggling to login due to forgotten passwords, please see the **News and Announcements** section under your login details for I contact details (see [figure 2](#)).

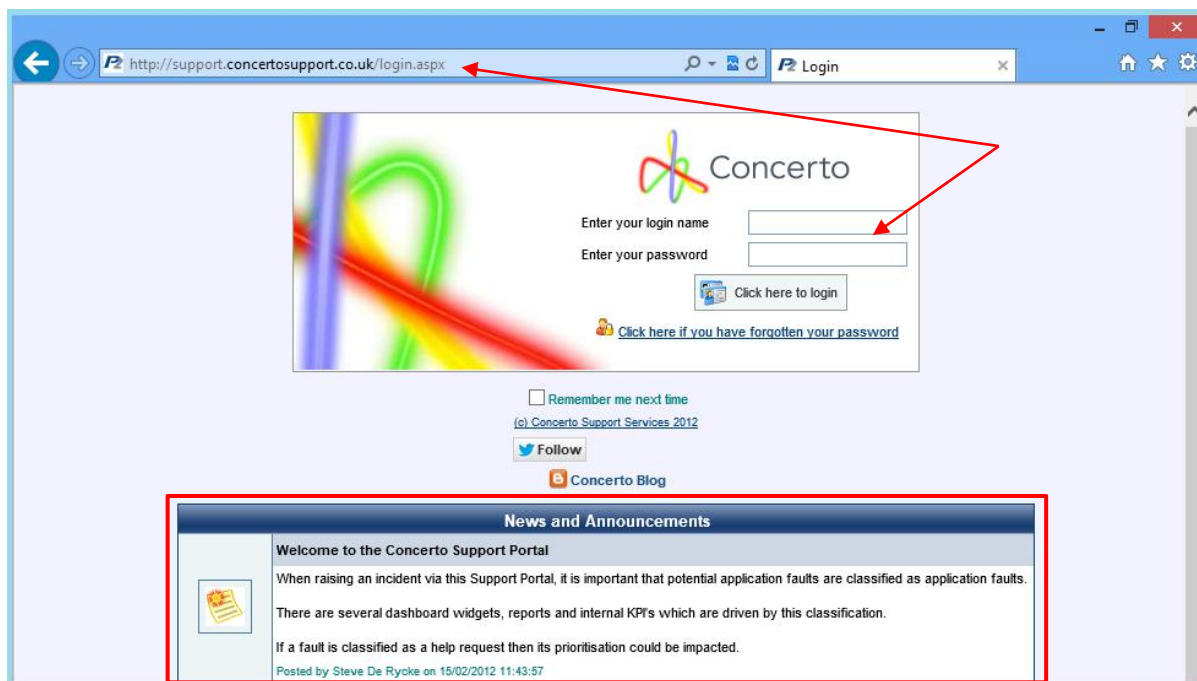


Figure 2 – Login

If you forget your login password select the **“Click here if you have forgotten your password”** link, enter your email address (see [figure 3](#)), an automatically generated password will be emailed to you. Select the **“Click here to try logging in again”** link, enter your login name followed by your new password. Once logged in you can change your password from the **“My Profile”** page

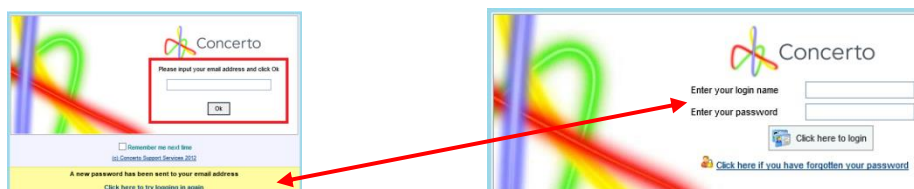


Figure 3 - Enter email address

NOTE:-



As a web based system, Concerto can be accessed from any PC that has an internet connection, by typing your specific Concerto URL into the web browser.

Assigning to your favourites

1. Select the **Favourites icon** from your web browser the select the **Add to favourites** option (see *figure 3*)

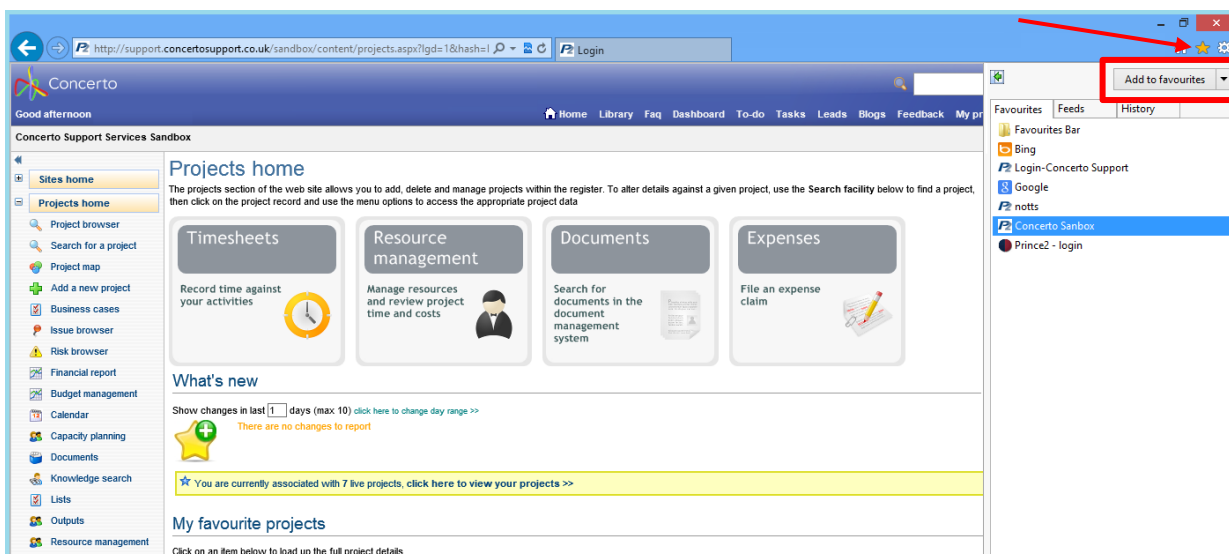


Figure 4 - Add to Favourites

1. Type in the name of you Concerto site address and click **Add** to retain the login URL (see *figure 4*).

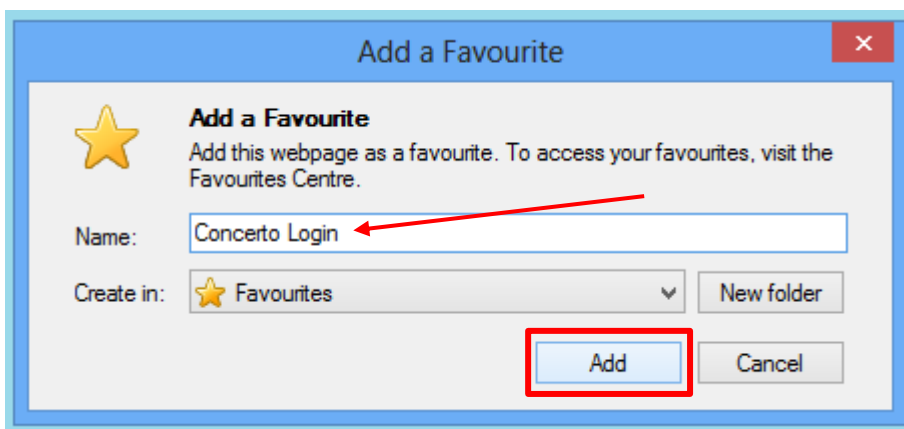
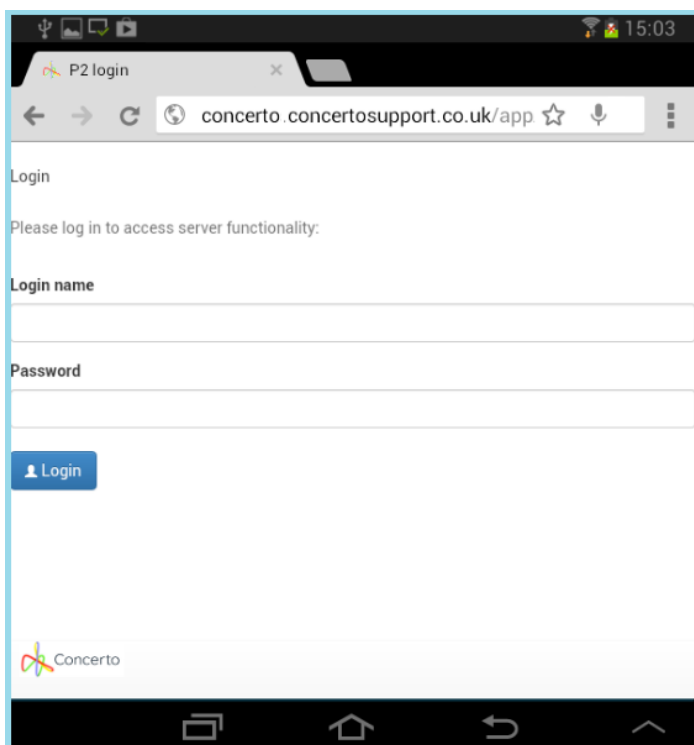


Figure 5 - Saving to favourites

Once you have saved your Concerto login URL to your favourites, you can simply select this link from the list each time you wish to login.

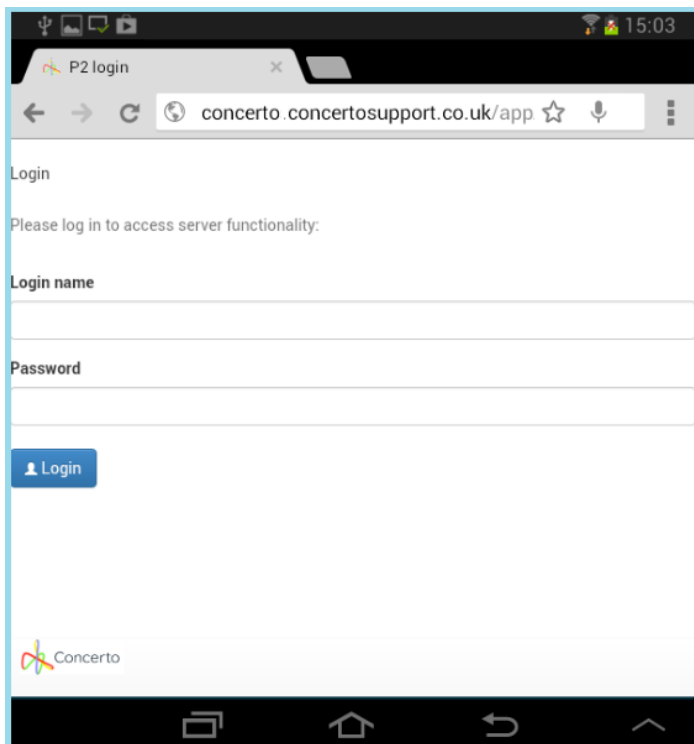
Condition Survey Web Application

The “**Condition Survey Application**” enables the ability to create and complete Condition surveys utilising a mobile device with the Android operating system, such as mobile phones (I.e. - Samsung Galaxy S3/S4) or on hand held tablets (I.e. – Samsung Galaxy Tab 10.1). The mobile device must also have an internet connection whether that be via wireless, 3G or 4G, in order for it to be able to connect to your specific Concerto URL. You will not be able to login to the Concerto URL via the mobile device unless that specific device is connected to the internet. In the following documentation I will be using a Samsung Galaxy Tablet 10.1.

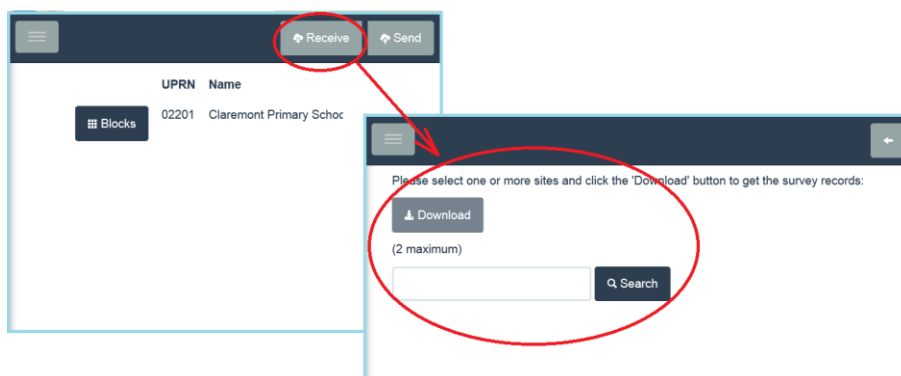


Accessing the Condition Survey Web Application

Before you can create/complete a Condition Survey, you will need to connect to the Condition Survey Web Application via the hand held mobile device. This can be achieved by selecting the internet browser on the mobile device to then enter your Concerto URL followed by the forward slash “App”. I.e. “**Support.concertosupport.co.uk/app**”



Once you have accessed the “**Condition Survey Web Application**”, you can then login with your normal Concerto URL login credentials. This will direct you to the main Condition survey page where you can then select the “**Receive**” button in the top right hand corner of your screen to enable a search for sites, download the specific existing Condition survey data, or create a new Condition survey, to then complete and upload into your Concerto system.



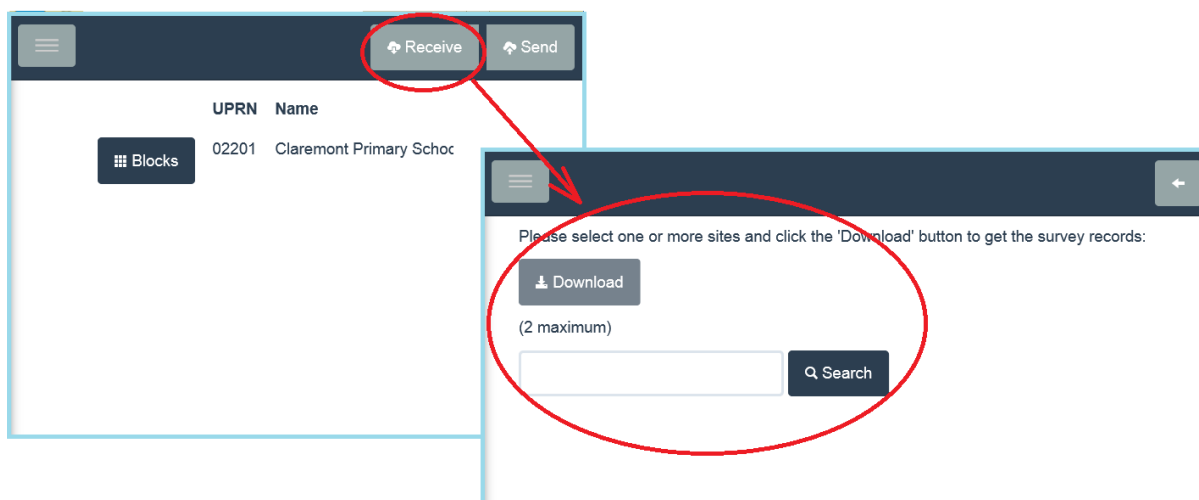
Condition Survey Web Application – Process guide

To utilise the Condition Survey web application you will need to follow the step by step guide below, which will take you from the Condition Survey web app home page to uploading data.

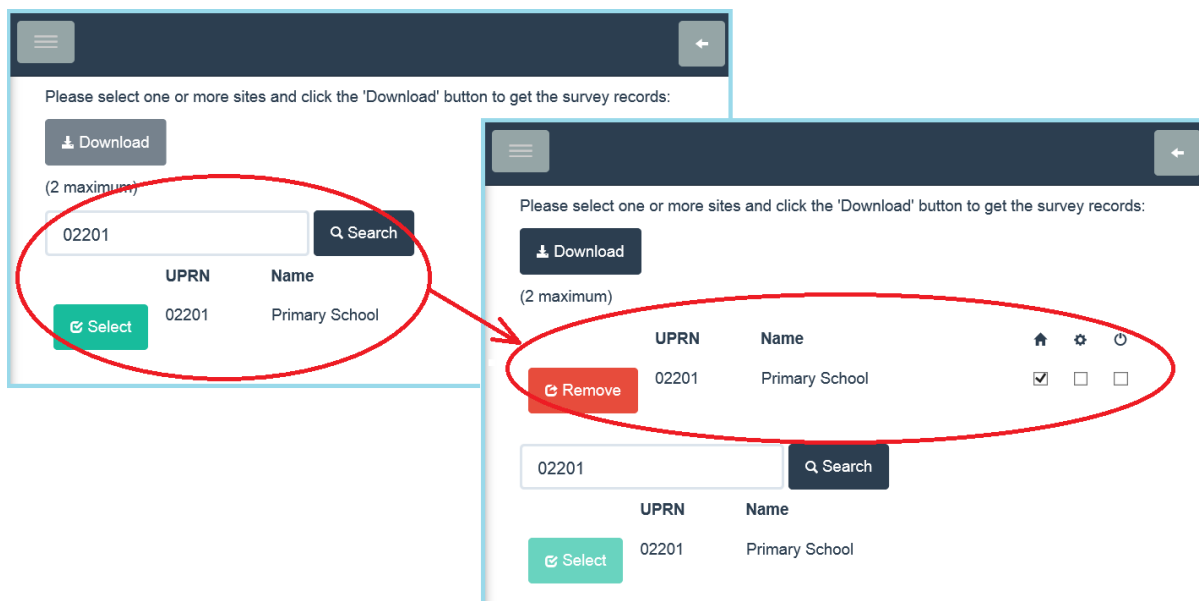
<u>STEPS</u>	<u>WEB APPLICATION BUTTON</u>	<u>TO DO</u>
Step 1	Receive button	Search for your required site
Step 2		Press the “ Select ” button to select the specific sites of interest.
Step 3		Select the relevant Condition surveys to download. I.E – Electrical, Mechanical or Building.
Step 4		Select the “ Download ” button to download the Condition survey records for that/those specific sites.
Step 5		Select the “ Blocks ” button against the specific site you are interested in.
Step 6		Select the “ Locations ” button next to the required block.
Step 7		Select the “ Elements ” button next to the require location for a list of condition surveys filtered under the headings of either Building, Mechanical or Electrical.
Step 8		Select “ Edit ” to then complete that specific Condition Survey.
Step 9		Your Condition survey will be highlighted in orange. Once you have completed all the relevant surveys, “ Save ” and “ Send ” to upload back to your Concerto URL.

Condition Survey Web Application – Download Survey data

To download your Condition survey data you will be required to select the “Receive” button in the top right hand corner of your mobile devices’ screen to search for the relevant sites that you may be required to carry out the Condition survey on. Once you have searched and found the specific site you require, you are then able to “**Download**” the relevant site information to then complete the specific Condition survey for the relevant element within the block associated to the downloaded site.

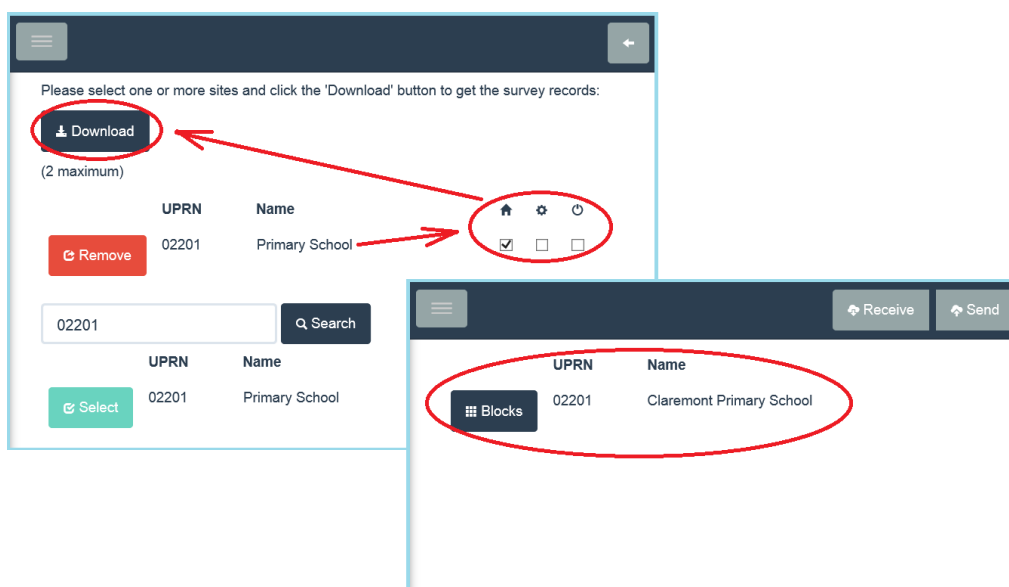


To search for the relevant site for which you need to complete the Condition survey, type in the name of your required site, select the “**Search**” button.



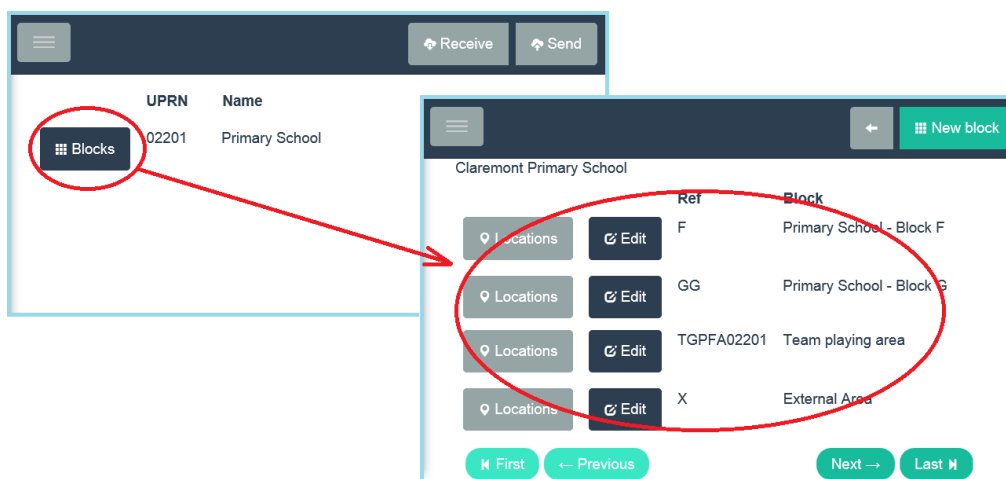
This will relay a list of applicable sites for you to select. Once you have clicked on the **“Select”** button next to the relevant site, your site will move above the search field and will now have a **“Remove”** button highlighted in red to its left. This will remove the chosen site giving you the option to select different sites as you may only select a maximum of 2 sites at any one time utilising the Condition survey web application.

You will also notice, to the right of your selected site, you will see the relevant condition survey headers that you can complete such as Building surveys (the small house icon), Electrical surveys (the small power symbol icon) and Mechanical surveys (the small cog icon). You will need to place a tick in the relevant checkbox to obtain that specific Condition survey for your selected site, therefore click on the relevant checkbox for each site to then select the **“Download”** button which will then retrieve the specific Condition survey data, ready to complete and upload back into your Concerto URL.



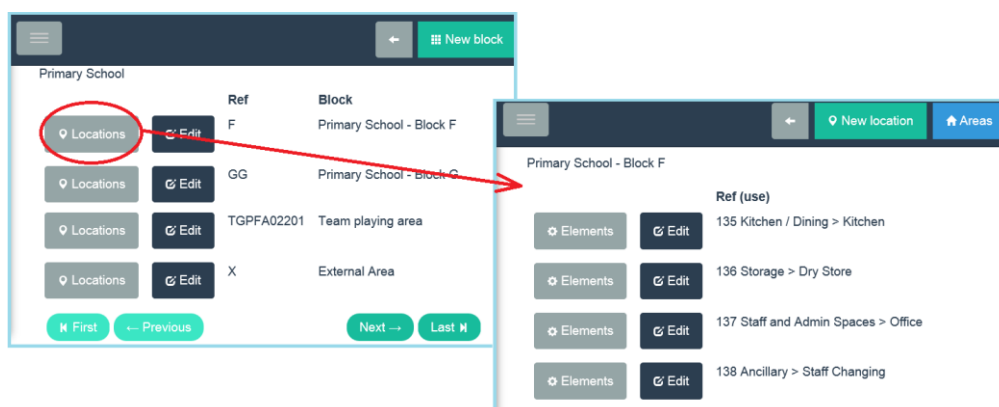
Condition Survey Web Application – Completing Condition Surveys

Once the Condition survey information has been downloaded you will see the button option for “**Blocks**” in relation to the specific site. Select this “**Blocks**” button which will load a new page containing a list of blocks and associated references for your selected site, to the left of each block will be a “**Locations**” button and an “**Edit**” button.

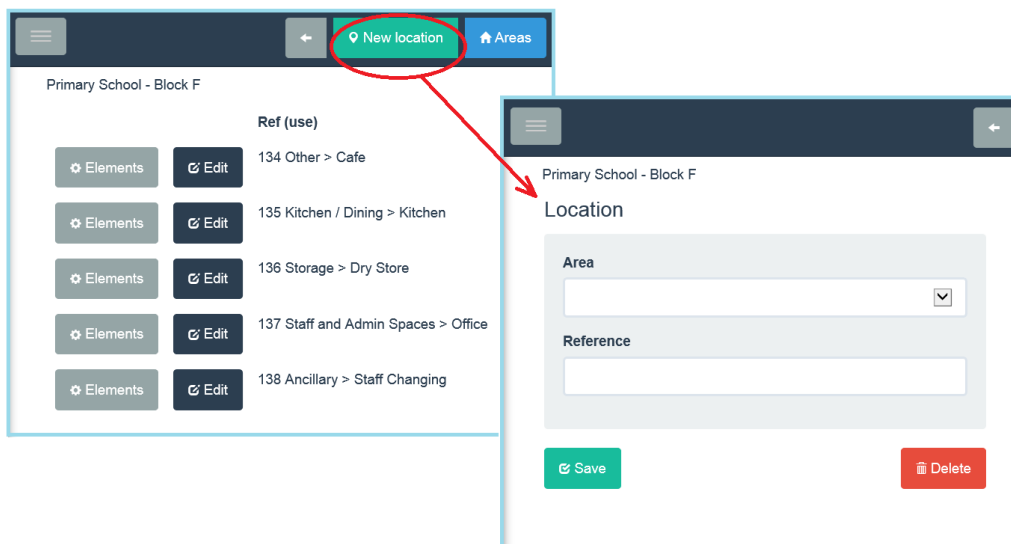


The “**Edit**” button will simply allow you to make amendments to the block details if required. You will notice in the top right hand corner of your mobile device, a “**New Block**” button highlighted in green, this will simply allow you to add a new block to a site within the Condition survey web application, you will be required to complete building details; year, name & building & block references. Construction details such as; year of build, No of stair ways/floors and GFA/GEA.

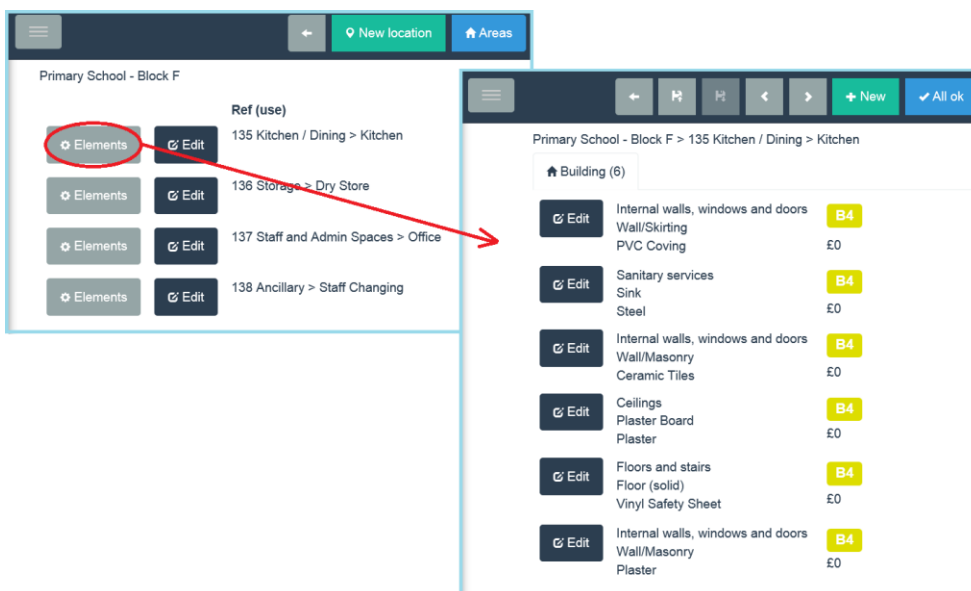
The “**Locations**” button will take you into a list of rooms within the block. From here you can then select the specific “**Elements**” within the room, that you may be required to complete the Condition Survey for.



If you cannot see your specific locations (room) you require it's possible to select the **"New Location"** button highlighted in green in the top right hand corner of your mobile device and create the relevant location, populating the Area information and a room reference. If you require to amend the specific locations area details then you will need to select the **"Areas"** button highlighted in blue on the top right hand corner.



To complete the condition survey data you will need to select the **"Element"** button against a location, this will then display a list of condition surveys to be completed by selecting the relevant **"Edit"** button.



The **"New"** button in the top right hand corner highlighted in green will allow you to create a new condition survey for an **"Element"** within the selected **"location"**.

The **"Edit"** button will enable you to complete your condition survey and will be split into 6 sections;

Section 1 – Element

Element group

Select the relevant “**Element group**” you require. The options that appear within this drop down menu will be pre-configured under the “**Administration**” module – “**Element schedule**” menu, where you can manage the “**Element groups**”, there associated “**Elements**” and “**sub elements**”.

Within the Concerto system, this will relate to the “**Main Element**” field within the Condition Survey.

Element

Dependent upon the chosen “**Element group**”, this will dictate which “**Elements**” you can select from this drop down menu. The options that appear within this drop down menu will be pre-configured under the “**Administration**” module – “**Element schedule**” menu, where you can manage the “**Element groups**”, there associated “**Elements**” and “**sub elements**”.

Within the Concerto system, this will relate to the “**Element**” field within the Condition Survey.

Sub element

Dependent upon the chosen “**Element**”, this will dictate which “**Sub Elements**” you can select from this drop down menu. The options that appear within this drop down menu will be pre-configured under the “**Administration**” module – “**Element schedule**” menu, where you can manage the “**Element groups**”, there associated “**Elements**” and “**sub elements**”.

Within the Concerto system, this will relate to the “**Element type**” field within the Condition Survey.

Age of element (in years)

Manually enter the number of years (as a numerical value) for the age of your element.

Within the Concerto system, this will relate to the “**Please give the age of this item at time of survey**” field within the Condition Survey.

Life remaining of element (in years)

Manually enter the number of years (as a numerical value) for the life remaining of your element.

Description of element

You can manually type in the element description if required or you can click on the small blue square with a pencil icon to then select from a pre-determined phrase. The condition survey phrases are predefined under the “**Administration**” module – “**Elements schedule**” menu – under the “**Options**” button associated to the left of each element group.

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**Please describe the component**”.

Total quantity measure of element

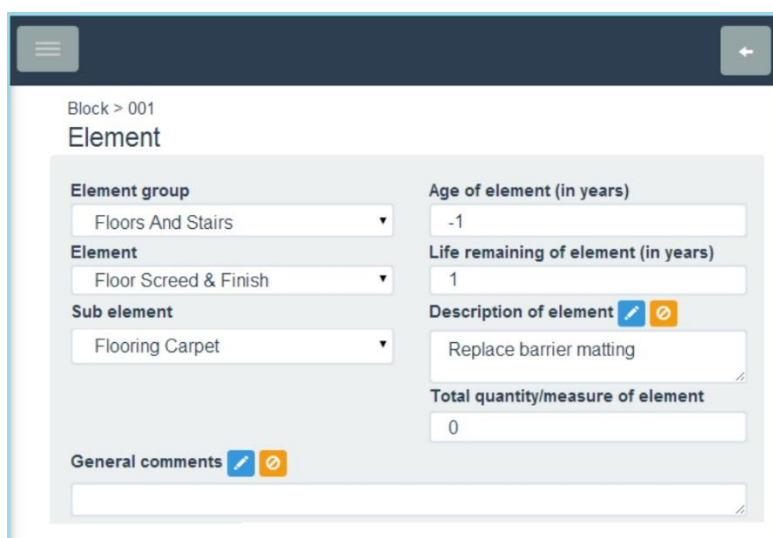
Enter the total quantity measure for the element.

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**Quantity of measure**”.

General comments

You can manually type in the element description if required or you can click on the small blue square with a pencil icon to then select from a pre-determined phrase. The condition survey phrases are predefined under the “**Administration**” module – “**Elements schedule**” menu – under the “**Options**” button associated to the left of each element group.

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**Enter any general comments you have**”.



Block > 001

Element

Element group	Floors And Stairs	Age of element (in years)	-1
Element	Floor Screed & Finish	Life remaining of element (in years)	1
Sub element	Flooring Carpet	Description of element	Replace barrier matting
		Total quantity/measure of element	0

General comments

Section 2 - Condition

Condition

From the drop down list select the relevant condition. These options are hard coded within the Concerto system.

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**Condition of element**”.

Further information

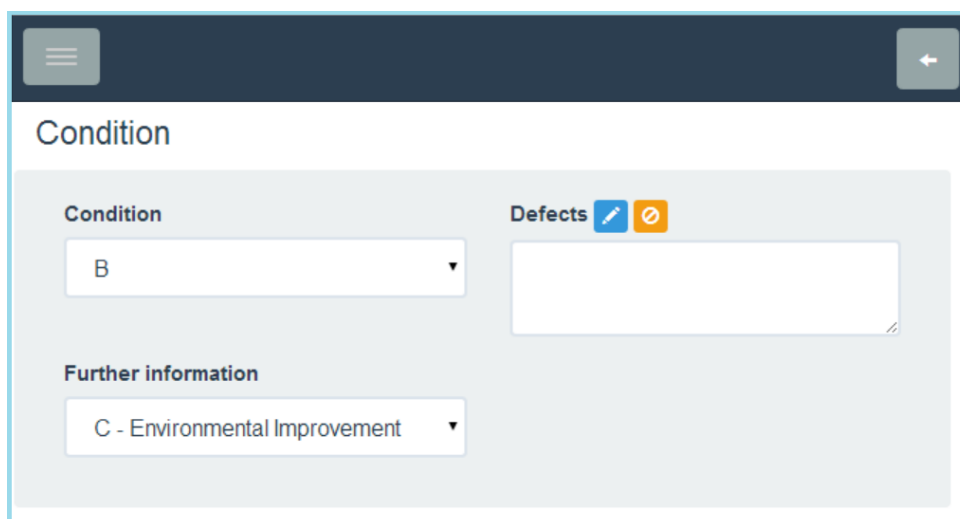
From the drop down menu select the relevant option. The options available to you are configured within the Concerto system under the “**Administration**” module – “**Lookup table**” menu – “**Site specific**” – “**Survey element tag**”

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**Further information**”.

Defects

You can manually type in the element description if required or you can click on the small blue square with a pencil icon to then select from a pre-determined phrase. The condition survey phrases are predefined under the “**Administration**” module – “**Lookup tables**” menu – “**Site specific**” – “**Survey phrases**”.

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**If there is a specific defect you would like to describe, please enter details here**”.



The screenshot shows a mobile application interface for a 'Condition' survey. At the top, there is a dark navigation bar with a menu icon on the left and a back arrow on the right. Below this, the title 'Condition' is centered. The main content area is light gray and contains three sections: 1. 'Condition' with a dropdown menu currently showing 'B'. 2. 'Defects' with a blue pencil icon and an orange eraser icon, followed by a text input field. 3. 'Further information' with a dropdown menu currently showing 'C - Environmental Improvement'.

Section 3 - Works

Recommended works

You can manually type in the element description if required or you can click on the small blue square with a pencil icon to then select from a pre-determined phrase. The condition survey phrases are predefined under the “**Administration**” module – “**Lookup tables**” menu – “**Site specific**” – “**Survey phrases**”.

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**Recommended works**”.

Priority

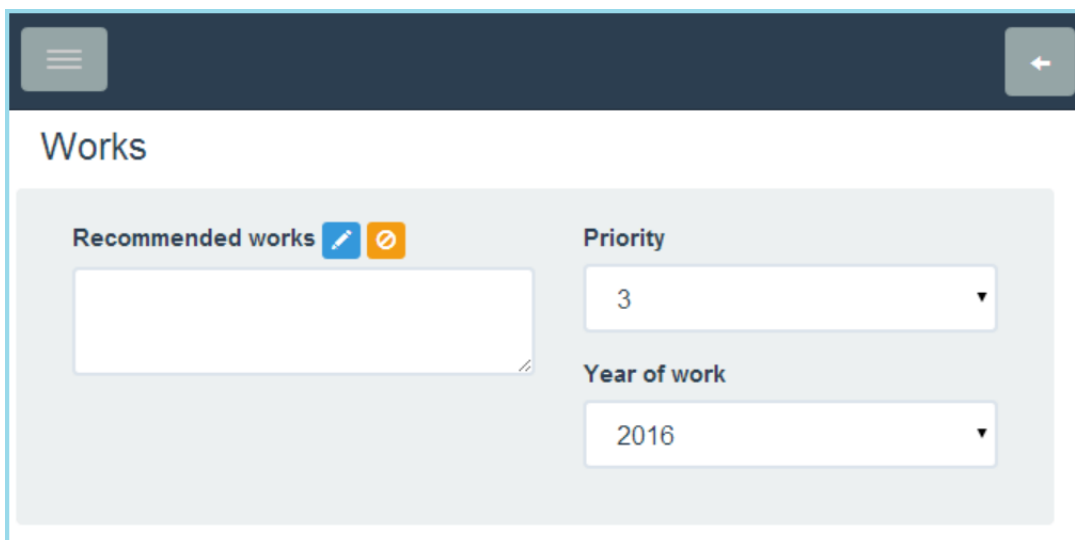
From the drop down menu select the relevant option. From the drop down list select the relevant condition. These options are hard coded within the Concerto system.

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**Select the priority of the work to be carried out**”.

Year of work

This field will be directly affected by the “**Priority**” choice field.

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**What year should the work be carried out**”.



The screenshot shows a mobile application interface for 'Works'. At the top, there is a dark blue navigation bar with a menu icon on the left and a back arrow on the right. Below this, the title 'Works' is centered. The main content area is light grey and contains three input fields arranged in two columns. The left column has a text input field labeled 'Recommended works' with a blue pencil icon and an orange clear icon to its right. The right column has a dropdown menu labeled 'Priority' with the value '3' selected. Below the 'Priority' dropdown is another dropdown menu labeled 'Year of work' with the value '2016' selected.

Section 4 - Cost

Quantity

Type in the quantity which will be the measurement of work required.

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**Measure work required**”.

Rate

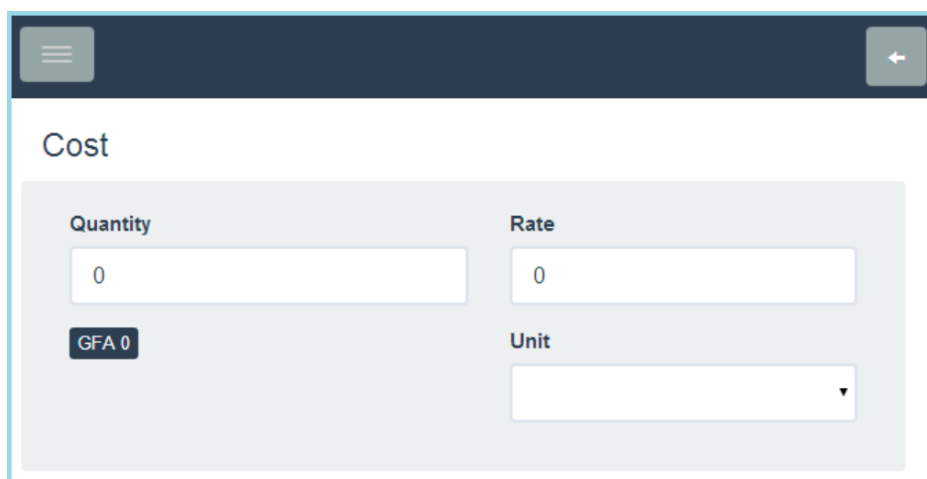
Type in the rate at which the “**Quantity**” will be multiplied by.

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**Rate**”.

Unit

From the drop down menu, select the correct unit of measurement.

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**Unit of measure**”.



Section 5 - Estimated Cost

The “**Estimated cost**” will derive from the information entered into “**Section 4 – Costs**”. Any additional costs enter under this section will be included to give you the “**Total cost**”.

Schedule button (highlighted in blue)

The “**Schedules**” button will pull through any “Schedule of Rates” that have been configured within the Concerto system, this could be utilised in conjunction with condition survey element items as you could create a specific schedule for condition surveys to give you an estimated cost for the remedial work on that specific survey. To utilise the “**Schedules**” button for condition surveys you will need to have had your “**Schedule**” configured with the Concerto system under the “**Administration**” module – “**Schedule**” menu - “**Condition Survey**” tab.

To use this button you will select the blue “**Schedules**” button to then enter the quantity for the specific schedule item, dependent upon how the schedule item has been configured will depend how the total value will be calculated. If you enter the wrong quantity value simply select the orange “**nullify**” button to cancel that value. You will notice there is no enter button therefore you will select the blue “**Back**” button to confirm your values.

Additional cost

Enter any relevant additional costs.

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**Additional costs**”.

Abnormal cost

Enter any relevant abnormal costs.

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**Abnormal costs**”.

Contingency

From the drop down menu select the correct contingency level that is relevant towards your condition survey element, these are predefined under the “**Administration**” module – “**Lookup tables**” menu – “**Site specific**” – “**Survey contingencies**”.

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**Now select the cost contingency**”.

Fees

From the drop down menu select the correct fee level that is relevant towards your condition survey element, these are predefined under the “**Administration**” module – “**Lookup tables**” menu – “**Site specific**” – “**Survey fees**”.

The information that may already populate this field will derive from the Condition survey within the Concerto system – field, “**Now select the Fee level**”.

☰

←

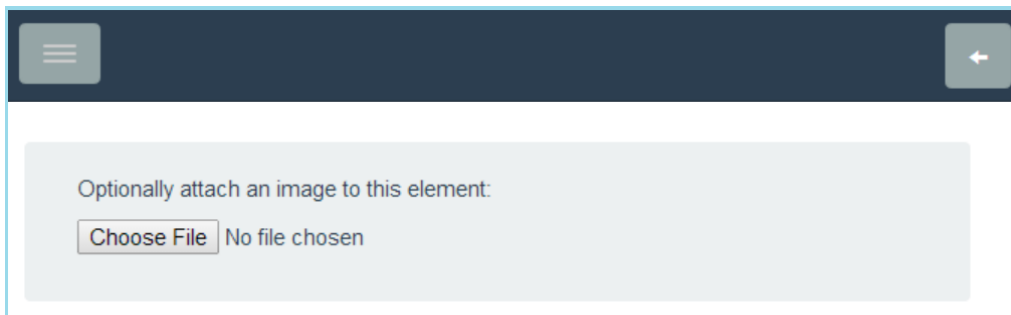
Estimated cost: £0 [Schedule](#)

Additional cost	Contingency
<input type="text" value="307.5"/>	<input type="text" value="0"/>
Abnormal cost	Fees
<input type="text" value="0"/>	<input type="text" value="0"/>

Total cost: £308

Section 6 - Attachment - Optional.

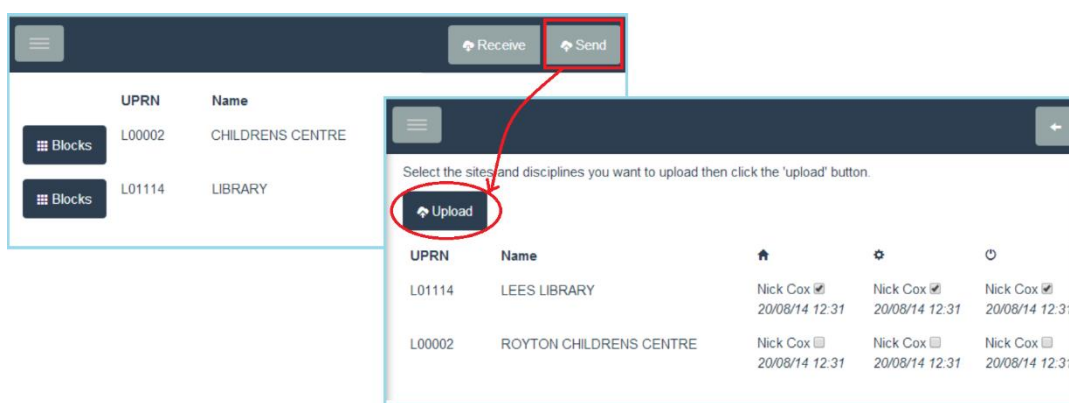
This section will allow you to attach an image to your condition survey element, by selecting the “**Choose file**” button to then search your PC for the relevant image, once found select the image and click on the “**Open**” button to finish attaching the file.



Once you have completed the condition survey with the relevant information you can select the green “**Save**” button to save all data and highlight that elements condition survey with an orange banner.

Condition Survey Web Application – Upload Condition Survey Data

Once a condition survey has been completed with all relevant data, you can then upload this information back into the Concerto system by selecting the “**Back Arrow**” button multiple times until you see the “**Receive**” and “**Send**” buttons. You can now select the relevant surveys you wish to push back into the Concerto system by placing a tick in the checkbox associated to each site and its specific survey, for example in the image below you may wish to select the Buildings, Mechanical and Electrical surveys for the site – Library but for the site – Children’s centre you may not select any condition surveys as these may not be complete (the app will not allow you to upload any data unless at least one survey has been chosen). Once all surveys have been selected, click on the “**Upload**” button.



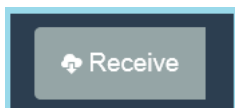
The “**Upload**” button will allow the mobile device to push all specified data back into the Condition survey for its relevant site, within the Concerto system (provided your mobile device has an internet connection).

Condition Survey Web Application – Buttons

Under this section of the Condition survey web application help guide we will go through those buttons that have not been covered throughout different sections.

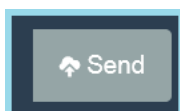
Receive Button.

This button will direct you to the screen which allows you to select multiple sites to download the condition survey information.



Send Button.

This button will direct you to the screen which allows you to select multiple condition survey information for multiple sites to then upload this information back into the Concerto system - condition surveys.



Back Button.

The “Back” button will allow you to go back one page at a time.



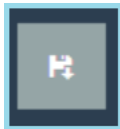
Copy Button.

The “Copy” button give you the capability to be able to copy existing “Elements” and all there data to the paste this information into a different/new “Location”



Paste Button

The “**Paste**” button will allow you to paste any copied “**Elements**” into another “**Location**”



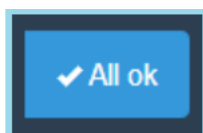
Menu Button.

The “**Menu**” button will direct you to the menu options from which you will have a number of options such as; logging out of the “**Condition Survey**” application top then login to another Concerto application such as “**Helpdesk**”.



All Ok Button

The “**All Ok**” button will give you the functionality to mark all elements within a room as “**Ok**”, highlighting those “**Elements**” in Green. This may be useful if the specific room containing the elements and its elements have not changed condition it, therefore maybe feasible to mark all as ok leaving the survey data the same as the last condition survey.



Scroll Forwards and Backwards Buttons

The “**Scroll**” buttons will allow you to scroll forwards or backwards, through the multiple pages of “**Elements**” associated to the different rooms within your block.



Copyright Statement

The material in this Training Literature has been prepared by Concerto Support Services Ltd. The copyright in the material belongs to Concerto Support Services Ltd and no part of the material may be reproduced in any form without the prior written permission of a duly authorised representative of Concerto Support Services Ltd. There are serious legal implications for anyone seeking to reproduce the material or any part of it without Concerto Support Services Ltd permission.

Main: 0844 858 9171 (Support and Enquiries)

www.concerto.co.uk

Check out the company blog at:

www.blog.concerto.co.uk



Company Address: Floors 1 & 2, 105 Main Street, Frodsham, Cheshire, WA6 7AB. Company registration: 5124418. VAT registration: 827 1950 18