buildtoo

User Manual
V 1.3_january 2020

Summary

this is buildtoo

To imagine a project (work) without slips in the budget, finished within the deadline, and in which the work done corresponds to the expectations of both the Owner of Work and the Project Manager seems a dream that at **buildtoo** we are committed to turn reality!

Our motivation is to seek a balance between the complexity of a whole constructive process and a good experience for all involved.

We believe that the interaction between the various participants in the construction process generates operational gains which become effective savings, reflected in their adequacy to the needs identified by the market and in the final construction cost, therefore strengthening the activity of the companies.

With this in mind we have created **buildtoo**, a project management platform for the construction industry, which allows us to organize and accompany the entire project, where we promote communication and collaboration, cost and deadlines control, and follow-up of tasks and decisions.

We enable quick and assertive access to follow-up diaries, project planning, budgets, all documentation, image gallery and more.

We standardize the coordination and follow-up of projects and works, enhance the efficiency and effectiveness of project management teams and promote the quality of shared information.

Our success depends on the trust placed in us and how we manage and coordinate all processes.

We are thankful for your interest at **buildtoo**, and we give access to the best mechanism which allows taking full advantage of its application: our User Manual.

The main objective of this User Manual is to provide a simple and useful tool for a fast and effective adaptation to the procedures of the **buildtoo** guaranteeing more efficiency, effectiveness and productivity in the management and monitoring of the projects.

Here you can perceive the whole process of using the platform: from the access, the all information insertion / consultation, right to the end of the project / work.

We are available to provide further clarification on how to use the platform or any other question, just contact us at cs@buildtoo.com or by phone +351 934 567 850.

Good work!

Frequently Asked Questions

Buildtoo is a software as a service (SaaS), with a cloud information system that allows real time access to the planning of the work, budgets, schedules and documents, through a computer or mobile device.

1. How can we access the platform?

The access to the platform is done through a browser (Safari, Chrome, Firefox, etc.), where you enter the server address assigned to the company (company.buildtoo.com). When the page is loaded, you will be required to enter the access data which were previously sent by e-mail, namely the "User Name" and "Password".

After filling in these fields, simply click on "Enter" and you will have access to the main page of the platform where all the projects to which the user may be associated will appear, listed or in carousel mode.

2. I forgot my password, what can I do?

If you need to recover your password, simply click on "I forgot my password", enter the registration email on the platform and click "Send". Then, an email with a new password will be sent. Afterwards, simply repeat the steps described in the previous point to access the list of projects.

3. Where can I find the Terms and Conditions and the Privacy Policy?

On the homepage, simply click on "Terms and Conditions and Privacy Policy" and a window will appear with our Terms and Conditions and respective Privacy Policy.
By using the platform, you agree to these terms.

4. Why does the list of projects have an associated color?

A color scheme is associated to the projects: "Red, yellow and green" which allows you to easily understand which of the projects may be cause for concern:

Red: amounts invoiced to this date exceed the total of the budgeted amounts and/or, to this date, the deadline initially foreseen has expired;

Yellow: amounts invoiced to this date exceed 75% of total budgeted amounts;

Green: amounts invoiced to this date are lower than the total budgeted amounts.

5. How do I "enter" a project?

To enter the project dashboard, where it is possible to insert and/or consult all the information in more detail, just click on the associated image.

6. What information is presented in the project dashboard?

When you enter the project homepage, the **dashboard**, what you can see is a summary of the most important information of the project through: info graphics with information regarding time control and cost control; the last image inserted in the project; the table of pending notifications; the timeline with the journal entries; detailed graphics with all financial information; and the time schedule where it is possible to know the progress/the delay of each phase of the project.

7. How to associate or edit project information?

In the side menu, on the left of the dashboard, you can select the functionality that you want to access: Start, Diary, Approvals, Changes, Payment Plan, Phase Management, Calendar, Documentation, which is divided into: Documents, Projects in Force, Reports, Minutes, Administration, Legal, Financial, Marketing and Archive, and then the Gallery tab.

8. Can I change the display language of the platform?

Buildtoo is translated into 4 languages: Portuguese, English, French and Spanish. By clicking on the icon you can select the language in which you want to see the platform.

9. Is it possible to change the display mode of the project list?

We have two types of views. The gallery view where you have a carousel that allows you to view all the projects or the list view where the projects are organized in alphabetical order on a paged list. In the list view you can also search for the project name by clicking the search box.

10. How can I highlight the favourites?

Just search in the projects list the star icon ★ and select it. From that moment on all the selected projects will appear in the beginning of the page in their own section.

11. How can I edit my account information?

To edit your account data, simply click the profile icon in the upper right corner. In this view, you can edit data such as "Name", "E-mail", and "Phone" and the projects to which you are associated.

12. How can I change my password?

To change the password simply go to the profile and put the old password , then the new one and repeat the new password to ensure there are no errors. To save the new information, just click Save.

13. How do I log out of the platform?

If you want to log out, just go to the upper right corner of the profile and select "Exit".

Project Phases

The development of any management tool implies necessarily the creation of a methodology through the definition of processes, which allow structuring the operation and creating a basis of work.

We believe that this is the only way to add value to projects: through strategic cooperation and excellent procedural management. The strategy used at **buildtoo** was to map processes across companies in the construction sector, and thus identify all the steps that may be associated with a construction process.

We structured this process into five categories: acquisition, project, negotiation, work and after-sale. Each category is defined by a set of phases that characterize the process as a whole, and can individually be associated with the projects.

What defines each of these categories?

Acquisition – corresponds to the entire process regarding the search for a property / investment and possible financial support, namely application for incentives or available bank credits. In this category the contract for the purchase and sale is drawn up.

Project – encompasses the whole accomplishment of the architectural project, from the topographic survey to the execution project, incorporating structural and technical constructive solutions. In this category, the written and drawn documents for the presentation of the project to the competent entities for Licensing are also prepared.

Negotiation – covers all types of negotiations. In this category, is also made a review of all elements developed in the previous category.

Work – this category begins with the execution of the work by the various teams involved in the construction process. Supervision is also carried out, starting with contractual financial control and approval of materials, planning control, management of requests for clarification and the meeting between all parties.

After-sale – where the temporary reception of the contractor to the client and the contact with the licensing entities for the inspection of the work occur. After-sale also gives support to the client during the warranty period and prepares a maintenance manual.

Each category is defined by a set of phases that characterize the process as a whole, and that can individually be associated with the projects.

What phases are included in each category?

Acquisition:

Scouting, which is the first phase of contact with the Owner of Work, consists in the search for a property / investment or, if the client already owns the property, in the collection and analysis of the documents associated with the property;

The Procurement is the phase dedicated to the market search for suppliers of services that are not associated with the general works, such as marketing, lawyers, designers, etc.

Project:

The Survey consists of a topographical survey of the land and / or architectural survey of existing buildings;

The Concept comes down to a debate of ideas between the owner of the work and the team of architects, resulting in a first draft with a budget estimate according to the value that the owner of the work has in mind;

The Previous Study is the development in greater detail of the previous phase, which already includes 3D images or a model;

The Base Project/Architecture Licensing phase presupposes the development of a previous study with the definition of all the important factors of the architecture and of the other specialties. The project will have a higher degree of development than in the previous study, incorporating already structural and technical constructive solutions. This phase prepares all written and drawn documents for the presentation of the project to the City Hall for Licensing (written and drawn documents in number requested by the respective entity).After the approval of the Owner of Works, and the need for licensing is verified, the responsible team organizes the necessary documentation for the respective town hall;

The Base Project/Licensing of Specialties presupposes the adjudication of the project of specialties and its delivery to the respective licensing entities;

The Execution Project includes the details of the architecture project according to the project of specialties; this is done in great detail;

The Project management - where the manager compiles all the information related to the project.

Negotiation:

Project review, where the project manager collects and reviews all the elements developed in the previous category;

Negotiation of works includes the launching of the works tender, the analysis of proposals and the adjudication of contracts;

Negotiation of suppliers includes the preparation of specifications and map of quantities, launch of tender and adjudication.

Works:

General Building Contract consists of the execution of the work by the contractor and its monitoring by another team. This phase can be divided into 3 different steps;

Inspection contains the elements related to the contractual relationship of the provision of services with the Work Owner, namely, reports, opinions, etc. .

After-sale:

Licensing Support where the temporary reception of the contractor to the client and the contact with the licensing entities for the inspection of the work occur;

After-Sale is the client support during the warranty period of the works;

The Definitive Reception takes place at the end of the warranty period, when the contractor ceases to have any responsibility for the construction, and where a final inspection is carried out;

Maintenance Management presupposes the preparation of a maintenance manual and a schedule with the dates of future interventions.

Dashboard

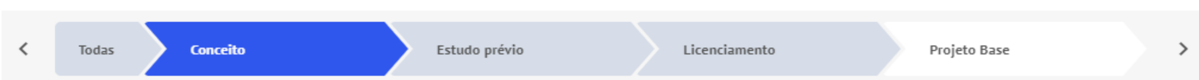
The dashboard allows analyzing the main indicators in the construction process as contract deadlines, contract budgets and the work carried out during the project / work.

What is a Dashboard?

It is the first view that appears when you enter the project. Here it is possible to see the project summary as well as control all the deadlines and costs of the project.

Filter Bar of Phases

In every section that is justified, the filter bar is present to help us gather information about the phase of the project we are looking for. In this bar, if the phase is contracted, it appears in grey, if it is not ongoing or light blue if it is in progress. We can select one or more phases which will turn dark blue, and only the information regarding these phases will appear. Since it is possible to select just a few phases to each project, the bar of phases can be personalized to show only the contracted phases.



Pie chart - "Deadline Control"

When we enter the project, just below the filter bar of the phase we have the pie chart for controlling deadlines. In the center of the chart we can see how many days are left to the end of the updated contract deadline: if the project is on time, the days appear in green. If the project exceeds 75% of the deadline, it will appear in yellow. If you have exceeded the contract term, the days appear in red.

We can also find 4 indicators:
- outer limit dark blue: indicates the contract deadline from the beginning of the project until the end of the last phase.
- dark blue background: shows the percentage of the use of the deadline, that is, the progress of the project.
- light blue limit: shows the total changes to the contract deadline, if they happen.
- light blue background: indicates the percentage used of contract changes.

Pie chart - "Financial Control"

The second chart is related to financial control and gives an overview of budgets, including how much has already been used. The chart shows the percentage of the budget that has already been executed: if it is green it means that the costs are being met, if it is yellow the costs are close to the limit and in red the budget has been exceeded.

Similarly to the time chart, this chart has 4 elements:
- dark blue outer limit: indicates the overall contract budgets for the project.
- dark blue background: shows the percentage of the contractual budget that has already been invoiced (does not include the budget

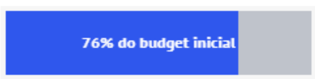
for the additional works).
- light blue limit: appears when work budgets are inserted in addition to what was foreseen.
- light blue background: appears when additional jobs are invoiced.

Bar chart - "Initial estimate"

In the bar chart of deadlines we can check the percentage of time that has already passed in relation to the initial estimate. The dark blue part indicates this percentage and the grey part the initially estimated total time.

Bar Chart - "Initial Budget"

The bar graph of cost tells us the initial budget percentage that has already been spent. The dark blue part indicates the percentage that has already been spent and the grey part the total budget.
If we want to see the percentage of budget corresponding to each phase, we just click on the phase or phases that we are interested in.



Photography

The image that is viewed refers to the first image of the last album inserted in the project.

Notifications

In the table of the notifications, we can check if there is any pending approval, in case there is, the table will appear in red and with the number of notifications, if there is not, it will appear in green.

"Diary"

We find the timeline for entries in the Diary and the amount of labor present each day.
This timeline is organized temporarily, and you can check the dates by clicking one of the arrows or the menu in the upper right corner of the diary.

To access the Diary menu simply click the icon on the left corner and you will be redirected to the diary menu.

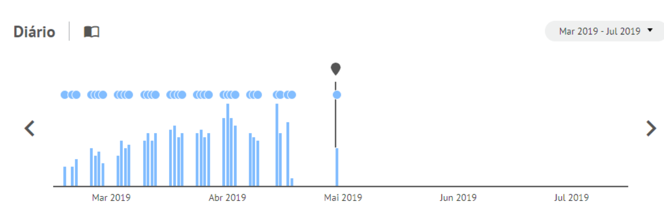
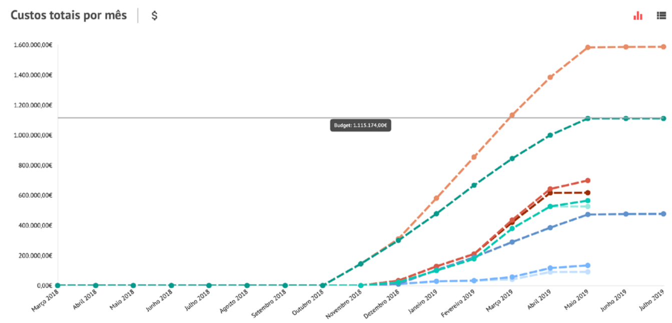


Chart - "Total costs per month"

This chart shows the total costs of the project depending on the month. The horizontal axis shows the months in which the project is taking place and the vertical axis shows the budget. The chart analyzes the variables: budget, invoice, contract payment, payment for additional work, total budget, total invoice, and total payment.

The budget represents the amount awarded for the execution of a certain phase, the invoiced is the amount issued in invoice corresponding to the work already performed, related to the phase in question and, finally, the payment means, as the name indicates, the value that was effectively paid so far. These variables are present either in the contract phase of additional or total works so that it is possible to have greater control over all, either specific phases, or the whole project.
There is also a horizontal line that represents the budget, to signal what was initially foreseen.



To more accurately examine your project costs, you can either go through the icon $ that redirects you to the payment plan tab or access it directly through the dashboard menu.

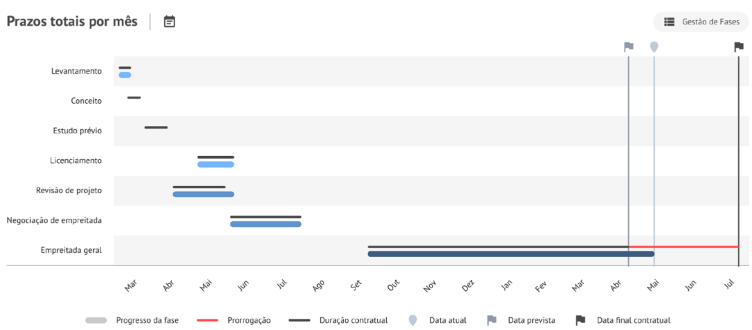
Cost Table

With the same functionality as the "cost per month" graph, it allows analyzing the payments inherent to the construction process.

However, it allows you to analyze the payments per month, relating them to the project phases and to the variables described here. To access just click on the table icon in the cost chart per month.

Chart - "Total Deadlines of the Month"

The chart "Total Deadlines of the Month" shows in detail all the information regarding the deadlines of each phase, namely: the initial estimate, the delays, the progress of each phase, the expected date as well as the final contract date.



In this chart the vertical axis indicates all the phases to which the project is associated and the horizontal axis the months of duration of the project.
In each phase that the project is associated with in our platform, we can see the following information:

the black line: shows the contract deadline of the phase;
the colored bar: indicates the progress of the respective phase. This line changes color depending on the category group of each phase;
the red line: appears when there are delays and the phase exceeds the final contract date.
The chart also has the following signs:

grey flag: indicates the final date of the initial estimate, i.e. the date that the project owner points out at time zero;
black flag: it is the indicative sign of the final contract date.

In the chart "Total Deadlines of the Month" you can also access the "Phase Management" menu by clicking on the icon that refers to it and also in the "Schedule" menu next to the chart title.

For more information see the tutorial video, here.

Side Menu

We can select the section we want to view on menu on the left side, where we find the following tabs: "Home", "Diary", "Approvals", "Changes", "Payment Plan", "Phase Management", "Calendar" "Documentation", which is divided into several folders, and finally the "Gallery".

Next, we will explain in detail each of these functionalities.

Home

When selecting "Home" we will always see the dashboard of our project.

Diary

This functionality allows you to consult information about the work performed on a given day. To know how many people have been allocated to the project and what kind of activities they have been developing, simply go over the elements of the graph, where you can see some details when passing over the bars or the "View details" icon.

How to access the functionality Diary?

The diary allows you to consult information about what is happening in the project. To understand the activities that have been developed, it is necessary to access the functionality diary on the left side menu and select the option "diary".

How to enter information in the diary?

To add content to this functionality you need to enter information such as the number of workers and the activities you have done, you can add a comment, the date of the activity and attach a file.

Is it possible to edit the content of the diary?

Yes, you can edit a diary through the left side menu and click on the functionality "Daily" or on the dashboard more specifically on "Daily" image select the option "see details" . To edit the content of this functionality simply click on the icon and make the changes you want.

How to delete a diary?

To delete the content inserted in the diary, you need to click on the respective daily icon and select "Confirm".

How to search for a diary?

To search for diaries, just write what you are looking for in the search box and press enter. At this point, all diaries containing the search terms are listed.

Approvals

Section where we can insert / consult all decisions submitted for approval.

This functionality allows project managers and owners to approve or refuse decisions. Any intervener can enter an approval on the platform and it is possible to define who can approve it.

What is the functionality Approvals?

The platform allows you to enter requests for approval regarding material changes, new documents or any other decision.

How to enter approvals?

To enter a new approval request, simply click on the icon and fill in the fields with the requested information.
When adding the approval it is necessary to indicate the name, select the phase to which it corresponds and the respective specialty, you can also insert comments and attachments.

Click on the "Add Files" and select the file you want, finally, to make the application for approval just click on "request approval" and choose the deadline for approval, the user or users must approve and click "ok".
For more queries, just view this video.

How to drive approvals?

When the menu to insert an approval is open and this option is selected a list appears from which it is possible to choose from the users of the project that we want to approve this request. After selecting one of several users it is possible to ask for a direct approval, which means any of the selected users can validate this request.

It is also possible to check the "It's required the approval of all selected users" box which means the approval will only be available and validated once every one of the selected users approve it. If one of the requested users do not validate the approval, it will be declined.

How to validate or reject an approval?

When any approval is upon request it generates a notification and there is the option to accept it or reject it. To accept just click on (x) and to reject on(x). In any of the actions it is possible to write a comment.

In case there is an approval there is already accepted by one user, but it is still on hold because of the approval of other users, this one is still visible in the approval menu. In those cases, the approvals that are still upon validation are shown in bold.

How to edit approvals?

In the approval requests we can view the inserted content by clicking on the "see details" button , you can still edit the approval request by clicking on the "edit" icon where you can change any inserted data and modify, for example, the approval deadline. When the approval has already been resolved (approved / refused) it is no longer possible to edit it.

How to delete?

In order to delete a change you need to click the "delete" icon and confirm that you want to permanently delete the approval request. This functionality is only available to the author of the approval.

How to search for approvals?

To search for approvals already done, simply search for the name, project phase, specialty or date range to which the change corresponds, just select the "search" icon .

Changes

In case there are changes to the initial plan, this menu is where we can register them.

This tool allows you to identify the tasks of each phase, which have undergone modifications at a budget level or contractual deadlines. It is in this tab that any changes are made regarding extra works, errors and omissions and the extension of deadlines, which will be shown on the dashboard in the pie charts and the graphs of "total costs per month" and "total deadlines per month".

What is the functionality Changes?

The platform allows you to make changes over the duration of the project. These changes can be made at any time and at any phase the project is associated with on the platform.

How to enter changes?

To insert a new change just click on the icon and fill in the fields with the requested information.
When you add a new change it is necessary to indicate the name, select the phase to which it corresponds and the specialty, you can also enter comments.

If the change affects the initially estimated deadlines and costs, it is also possible to insert this information.
In relation to the deadlines, the number of days that the project will be delayed is added. A cost change requires you to place the estimated budget by changing the amount invoiced and the payment deadline. If this change has already been paid, or if it is phased in, it is also possible to insert this information.

We can also insert files and to do so simply click on the "Add Files" and select the file you want. To request approval of the change, we must click on "request approval".

How to edit changes?

You can edit the change request by clicking on the "edit" icon where you can change any data entered and modify, for example, the previously entered deadlines or costs.

How to delete?

To delete a change simply click on the "delete" icon and confirm or cancel if you definitely want to delete the change. Deleted changes cannot be recovered.

How to search?

To search for any change you have to click on the "search" icon and enter the name, any keyword, the specialty or even phase of the project to which the change is associated.

For more information, see the tutorial video, here.

Payment Plan

All budgets and payment plans must be inserted in this menu.

This functionality consists of scheduling and defining the payment methods of the works done. It allows you to identify the works that need to be paid, the ones that have already been paid, and the amount invoiced, as already explained in the tab " Total costs per month" in the chapter "Dashboard".

What is the functionality Payment Plan?

In this functionality we can have access to all the information regarding the costs and payments associated with the project. We can also see what is to be paid and what has already been paid in the two existing tables within this functionality.

How to add a new payment?

To add a new payment simply click on the "Insert" icon and fill in the fields requested for the new payment: name, stage, specialty and budget. It is also necessary to fill in the fields related to invoiced amount and payment deadline.

If you choose the option of "payment by installments" you will have to indicate the number of installments, the value of each one and the date of payment. To insert this new payment simply click the "insert" button or, if you wish, activate the "request for approval" option, if it depends on the validation of other interveners in the project, select who should do it and finally click on "Request Approval".

How to import a payment through Excel?

To import a new payment just click on the importation icon that opens a window where it is possible to do the download of our Excel template clicking on . This Excel file contains the same fields as in the manual payment entry menu and must be filled in according to the required data, it also contains the possibility of staged payment.

Once completed, simply return to the import window opened before, click on "Add File" choose the correct file and confirm, at this moment it will be presented a loading bar that will be filled after clicking on "Import" and the file is uploaded to platform and automatically added as a new payment plan.

What can I check in the table "To be paid"?

The table "To be paid" shows all the payments entered that have not yet been paid. Here we can consult all the information regarding the budget, the invoiced amount and the payment deadline, as well as the amount paid so far.

You can also consult the "View details", "Edit" and "Delete" icons on each payment.

Paid

All the payments already made are in this table so that it is possible to check quickly and in detail.
As in the table "To be paid", each paid item is followed by 3 icons: "View details" , "Edit" and "Delete" .

When is my budget seen as paid?

The budget is considered paid when there is no entry in the table "To be paid", this means that the entire budget has already been paid.

How can I see the details of my budget?

To see the details of your budget, simply select the "Payment plan" $ functionality on the left side of the menu or the "Total costs per month" graph by selecting the icon .

For more information, see the video, here.

Phase Management

In this section we manage all phases of our project and its schedules.

This functionality identifies in detail the information about the phases developed throughout the project / work, the respective contractual deadlines, the changes and deviations of the goals initially defined.

What is the "Phase Management" menu?

In this menu, it is possible to see all the phases that are associated with my project, and to know the "Initial Contract Date" of each, the "Contract Duration", "Final Contract Date", "Foreseen Date", the "Total changes" and the "Deviations".

What is the Initial Contract Date?

It is the day previously defined for the beginning of the phase.

What is Contract Duration?

Indication in days of how long the phase will take.

What is the Final Contract Date?

It is the date initially defined for the end of phase.

What is the Foreseen Date?

It is the calculation of the actual start date of the phase with the sum of the contract duration and the duration of the changes made at the date.

What do total changes mean?

It is reflected in the total number of days in which the phase was changed as a result of the delay of the preceding phases.

What are deviations?

It is counting the days remaining for the conclusion of the phase at this point in time.

How to add a new phase?

To enter a new phase you need to access the left side menu, select the "Phase management" tool and press the icon + to add the phase.

When you enter a new phase, you need to add information about it, such as the project phase, Initial contract date, contract duration, observations, and then press the "Save".

How to see details about each phase of the project?

To view the information inserted when inserting a phase, just click the last icon ⋮ of phase line and select the option See Details.

How to start a phase?

To start a phase we must edit the phase we want, enter the start date of the works, click on "Start phase" and "Confirm".

When should I start a phase?

A contract starting date is defined for each phase that does not always correspond to the actual schedule. In this sense, this action serves to start counting when the task begins thus recording the progress over time.

How to edit each phase of the project?

In the phase management table select the last icon and click edit. In the process of editing a phase you can change the initial contract date, the final contract date and the observations.

How to eliminate a phase of the project?

To delete a phase you need to select the icon, press the "delete" button and finally confirm the operation by clicking on "confirm".

How can we adjust progress?

In order to change the progress select the "edit" icon , then in the window choose "Adjust initial date", "Adjust final date".

How to reopen a phase?

The possibility of reopening a phase exists when the phase has been completed and to reopen it is necessary to select the "edit" icon and then choose the "Reopen phase".

This functionality may be necessary in case we need to readjust the actual time of the phase duration, if it does not correspond to the expected one. Even after the closure of the phase, changes can be detected that have not been registered and that justify the reopening and, later, the closure of the phase. There may still be the case of the need to re-perform some task related to this phase and in this situation it has to be reopened until its conclusion.

How to close a phase?

To close a phase, choose the "Edit" button and select "End Phase". From that moment, progress is no longer recorded.

For more information see the tutorial video, here.

Calendar

Here we can see what is happening in our project as well as the future tasks.

This functionality allows you to see through a calendar when the project phases start or end and what tasks to perform. Dates are marked with different colors depending on the project phase to which it corresponds; each phase has a distinct color, or a task to be performed.

What is the functionality Calendar for?

The main goal of **buildtoo** is to control the deviation of deadlines, in order to promote the efficiency of all teams involved in a project and that the customer is satisfied.

In an initial phase, when inserting data related to the project, we also insert the expected dates for the duration of each contracted phase. However, deadlines are not always fulfilled and therefore have to undergo adjustments in the course of the work and it is important to have a functionality that allows you to view all significant dates of the project.

How to access this feature?

To view the schedule, just click on the tab with the same name, in order to see the plans for each of the phases.

What information can you view?

By clicking on the Calendar tab we can see the expected deadlines for each of the phases; this is displayed by week and month, by clicking the arrows you can navigate between the months. If you click on "Today" it is redirected to the current day, that day is red.

If you click on "Total" you will have an overview of the progress of the phases over time, to analyze the graph "Total deadlines per month" just go to the page where the explanation is available.

Is it possible to undo the progress of a phase?

Yes, just select the phase, click on "Initial State" and then on "Confirm".

How to edit the initial phase of the progress?

To edit the initial date of the already entered stage, select the phase in , then "Adjust Initial Date", change to the desired date and "Confirm" . If the phase is already closed the process is the same, and can always be reopened.

How to edit the actual final date?

If you want to edit the actual final date of a stage, you can re-select the phase, click "Reopen Phase", then "End Phase" and then re-enter a new final date and confirm .

How to close a phase?

When the phase is finished, the phase is edited, click on "Close Phase" and the desired date "Confirm".

Tasks

This tool allows you to enter tasks to be performed as a payment, an approval or the scheduling of a work that needs to be done.

What is the functionality Tasks to be performed?

The Schedule menu also allows you to add tasks to the schedule that are included in the course of the project.

How to insert a task?

To add a new task simply slide down the schedule, where you can see the tasks already added, click on , fill in the form with the name of the task, the stage to which it belongs, the specialty, the initial date and corresponding final date, and click "Insert".You can view the details of the task in the icon or schedule, you can also edit, delete or search.

Documentation

Menu subdivided into 9 sections: the documents that are updated, project, reports, minutes, folders from several areas and the archive where old versions of the documents can be found.

In this menu it is possible to see all the documents related to the project. It is divided into the following tabs that will be detailed separately.
The platform allows files of any extension and up until 500mbs.

Documents in force

How to insert a new document?

To insert a new document just click the icon . Then simply fill in the information about the document, namely the name of the document, the phase of the project, the specialty, add a comment and click "Insert". The platform allows you to upload files of any length.

What can we do in the documents in force?

- We can download the documents by clicking on the icon .
- Insert revisions, that is, when the document is updated, it is possible to replace the already inserted file with a new one by clicking the icon and updating its document. The platform will change the revision number and indicate how many times the file has already been updated. Whenever a new revision is made the outdated document goes to the file tab.

The "Documents" tab allows to:
- View the document data, on the icon ;
- Edit information inserted in the document, click on the icon ;
- Move the file from folder, click on the icon ;
- Delete a document, on the icon ;
- Search document, just click on and search for the word, phase, specialty or date range that identifies the document.

Projects

How to insert a new document?

To insert a new document just click the icon . Then simply fill in the information about the document, namely the name of the document, the phase of the project, the specialty, add a comment and click "Insert". The platform allows you to upload files of any length.

What can we do in the projects?

- We can download the documents by clicking on the icon .
- Insert revisions, that is, when the document is updated, it is possible to replace the already inserted file with a new one by clicking the icon and updating its document. The platform will change the revision number and indicate how many times the file has already been updated. Whenever a new revision is made the outdated document goes to the file tab.

The "Documents" tab allows to:
- View the document data, on the icon ;
- Edit information inserted in the document, click on the icon ;
- Move the file from folder, click on the icon ;
- Delete a document, on the icon ;
- Search document, just click on and search for the word, phase, specialty or date range that identifies the document.

Reports

In the "Reports" tab you can access all the reports made throughout the project, regardless of the phase.
To insert a new report the procedure is identical to the one to insert a new document, just click on the icon .
Then, fill in the information related to the report in the fields that are requested, such as: name, phase and specialty and activities in progress and planned. To add the report file simply click "Add Files" and select.

The "Reports" tab allows to:
- View information about the report by simply clicking on the icon ;
- We can edit information through the icon ;
- To delete the document, click on the icon ;
- Search for a report by simply clicking on the icon and searching for a word, phase, specialty, or date range that identifies the document.

Minutes

In the "Minutes" tab you can access all minutes.
To insert a new document, the procedure is the same as insertinga new document or report, just click on the icon . Then, fill in the information regarding the minutes in the fields that are requested, such as: name, phase and specialty and activities in progress and planned. To add the report file simply click "Add Files" and select.

The "Minutes" tab allows to:
- View information about the report by simply clicking on the icon ;
- We can edit information through the icon ;
- To delete the document, click on the icon ;
- Search for a report by simply clicking on and searching for a word, phase, specialty, or date range that identifies the document.

Administration

How to insert a new document?

To insert a new document just click the icon . Then simply fill in the information about the document, namely the name of the document, the phase of the project, the specialty, add a comment and click "Insert".

What can we do in Administration?

- We can download the documents by clicking on the icon .
- Insert revisions, that is, when the document is updated, it is possible to replace the already inserted file with a new one by clicking the icon and updating its document. The platform will change the revision number and indicate how many times the file has already been updated. Whenever a new revision is made the outdated document goes to the file tab.

The "Administration" tab allows to:
- View the document data, on the icon ;
- Edit information inserted in the document, click on the icon ;
- Move the file from folder, click on the icon ;
- Delete a document, on the icon ;
- Search document, just click on and search for the word, phase, specialty or date range that identifies the document.

Legal

How to insert a new document?

To insert a new document just click the icon . Then simply fill in the information about the document, namely the name of the document, the phase of the project, the specialty, add a comment and click "Insert".

What can we do in Legal?

- We can download the documents by clicking on the icon .
- Insert revisions, that is, when the document is updated, it is possible to replace the already inserted file with a new one by clicking the icon and updating its document. The platform will change the revision number and indicate how many times the file has already been updated. Whenever a new revision is made the outdated document goes to the file tab.

The "Legal" tab allows to:
- View the document data, on the icon ;
- Edit information inserted in the document, click on the icon ;
- Move the file from folder, click on the icon ;
- Delete a document, on the icon ;
- Search document, just click on and search for the word, phase, specialty or date range that identifies the document.

Financial

How to insert a new document?

To insert a new document just click the icon . Then simply fill in the information about the document, namely the name of the document, the phase of the project, the specialty, add a comment and click "Insert".

What can we do in Financial?

- We can download the documents by clicking on the icon .
- Insert revisions, that is, when the document is updated, it is possible to replace the already inserted file with a new one by clicking the icon and updating its document. The platform will change the revision number and indicate how many times the file has already been updated. Whenever a new revision is made the outdated document goes to the file tab.

The "Financial" tab allows to:
- View the document data, on the icon ;
- Edit information inserted in the document, click on the icon ;
- Move the file from folder, click on the icon ;
- Delete a document, on the icon ;
- Search document, just click on and search for the word, phase, specialty or date range that identifies the document.

Marketing

How to insert a new document?

To insert a new document just click the icon . Then simply fill in the information about the document, namely the name of the document, the phase of the project, the specialty, add a comment and click "Insert".

What can we do in Marketing?

- We can download the documents by clicking on the icon .
- Insert revisions, that is, when the document is updated, it is possible to replace the already inserted file with a new one by clicking the icon and updating its document. The platform will change the revision number and indicate how many times the file has already been updated. Whenever a new revision is made the outdated document goes to the file tab.

The "Marketing" tab allows to:
- View the document data, on the icon ;
- Edit information inserted in the document, click on the icon ;
- Move the file from folder, click on the icon ;
- Delete a document, on the icon ;
- Search document, just click on and search for the word, phase, specialty or date range that identifies the document.

For more information see the tutorial video, here.

Gallery

In the gallery we have the photographic record of the whole project.

It represents the evolution of the work carried out throughout the construction process from the architectural project, the evolution of works to the final result, through 3D images and photographs.

What is the gallery?

The gallery represents the timeline of a project through 3D images and photographs, which allow following the monitoring of the project in real time.

How to add albums to the gallery?

To add an album to the project is through the icon , to create it, we need to fill in some data such as album name, project phase, specialty, comments and add the file .

This functionality allows you to view developments in the project, in an order from the most recent to the oldest album. Another of the functionality is that the last image added is the same viewed in the initial menu.

How to add photos?

There are two ways to add files to an album: by clicking "Add Files" or dragging the files you want to insert. When you click on the icon, you automatically open a search tab and then select the files to insert.

How to search for albums in the gallery?

To find the album you want to view, you must access the filter bar. Because each album is associated with a project phase, which implies researching it through the phase to which it is associated.

If the purpose is to visualize all the albums associated with the project, it is necessary to select the "all" step in the filter bar, if the intention is to search 1 or several albums it is necessary to choose the corresponding phase(s).

How to download the added photos?

To download the photos added to the gallery, simply select the edit icon and in the list of all photos, click on the title of the desired one and download each one individually.

Other Functionalities

Chat

This tool enables the communication between owners of the work and project managers, with the purpose of providing information to all parties in a clear, objective and transparent manner.

What is Chat?

This functionality was developed in order to avoid loss of information and so that for all stakeholders to have access to the information always updated. It allows to communicate with all parties involved in the building process, send attachments and share external conversations.

How to access Chat?

Chat allows conversation between owners of the work and project managers and even between the team. To do this, simply select the icon in the upper right corner, and a page will open that shows the existing messages and where you can write a message or register one exchange from another channel.

How to save messages?

To save more relevant messages, simply select the messages you want to keep in a group and click the icon ★ and choose a name for the group of messages.

How to insert external communication?

If you receive an external email with project information you can always add this information by clicking on the icon ✉.

To insert an external conversation, you must add some data such as the sender, who sent the message, and the content of the message.

Then to view the information inserted simply access the left side menu in "external communications".

How to attach a file?

To add an attachment you need to click the icon , then just select the file you want to insert.

Advanced Search

What is Advanced Search?

This functionality allows for a more complete search by simply clicking on the icon . Here you can search for "Keyword", "Specialty" or date range. The "Keywords" option searches all the words entered in the file and not only in its title, thus obtaining a much greater range of results.

Where can I use the Advanced Search tool?

This tool can be used throughout the platform. To access, just click on each of the sections (icon) and all the Advanced Search options available for that menu will appear.

Data Aggregator

This tool is represented by the icon which is found in the upper part of the platform's homepage, where the projects are listed.

What is the Data Aggregator?

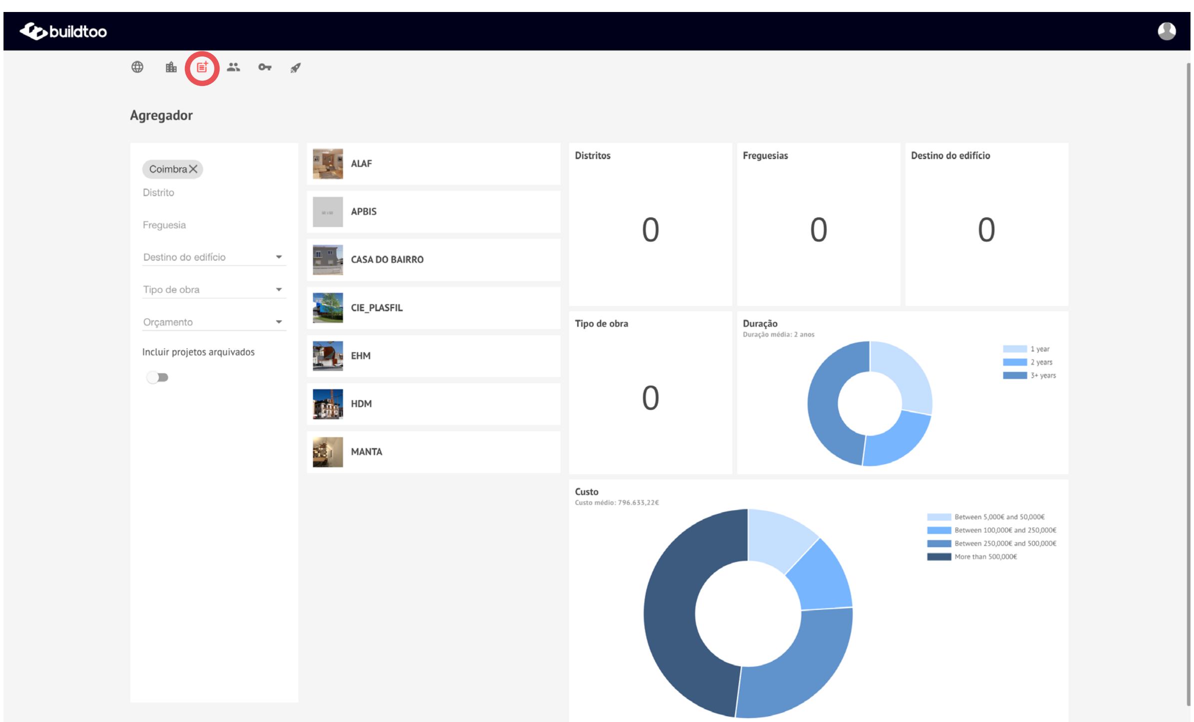
The aggregator is the functionality that allows to gather data from the different projects (active/archived), giving a global sight that facilitates the analyses of those who manage it.

What type of information can I get?

The Aggregator lists the set of projects corresponding to the selected filters. It will then represent the number of cases for each situation, showing all the information in the form of chats, where it is possible to see the number of projects per scale of cost and time.

What filters can I use?

The Data Aggregator has as base options the following filters: District, Parish, Building Destination, Work Type and Budget Range. Thus, allowing to gather information about the several projects on the platform by each of these filters.
So that the aggregator produces a reliable result, the projects should have these fields filled out.



Monitoring Report

This tool allows the elaboration of a resumed monitoring report, in a predefined format, relative to a time period that is selected by the user.

How do I elaborate a report?

To elaborate a report simply access the "Monitoring Report" icon on the tool bar, and then fill in the fields by choosing the option "Smart" and indicating the beginning and ending dates of the period to which, that report refers to.
After that, select the icon to generate the report in pdf, that report is displayed in preview in the browser, where it can be saved or printed.

What is a "smart" report?

The "smart" report is a predefined report format that contains organized information related to the sections: General Data, Diaries, Approvals (approved ones only), Changes, Reports and Gallery. The only operation required for this type of report is the selection of the time period and the possibility to add an initial comment to the report.

Project Resume

The Project Resume is the tool that gathers all the information about the project and is divided into four main areas: General Data, Project & Licensing, Negotiation and Construction Works. Each of these areas is composed by a set of sections that can be added by clicking on .

General Data

In "General Data" is presented the section "Identification" where is displayed the designation, code, address and location of the project. In addition, the following sections can be included:

Owners

This section displays the contact details of the Owner, being possible to add several individuals.

Owner Represented

This section displays the contact details of the Owner Represented, being possible to insert several elements.

Billing Data

This section displays the billing data that must be considered. There is the possibility to assume as billing data the details associated with the owner or his representative.

Project Metrics

This section displays the details that characterize the project such as areas (gross building, implantation, outdoor arrangements, waterproofing, usable floor and usable living), volumetry, category, type, destination and floors number.

Existing Metrics

This section displays the characterizing details of the existing such as areas (gross building, implantation, outdoor arrangements, waterproofing, usable floor and usable living), destination and floors number.

Tax Benefits

This section displays the details related to tax benefits, namely the dates for inspection requests and beginning of works communication, energy certificates (initial and final) and tax exemptions.

Financing

This section displays the data related to the project financing, namely the type of financing and the estimated budget, as well as the information about the financing need and its ensure relation.

Licensing

This section displays the type of licensing to which the project is subject.

Project & Licensing

In Project and Licensing, we have access to all the information related to the designers/planners involved in the project.

Planners

This section displays the designer's details such as specialty, name, company, contacts (professional and company), position and qualification. Here is possible to associate the data from several designers involved in the process by clicking the icon + .

Negotiation

The sections in the area Negotiation can be reproduced for each of the negotiation phases contracted in the project.

Tender

This section displays the data related to the tender, namely, phase, invitation date, number of guests, base price and doubts, visits and proposals dates.

Competitors

This section displays the identification and contact details of the competitors of a previously defined tender, as well as information about the visit, doubts, proposal and negotiation meetings about this competitor. The insertion of this section depends on the previous one, that must be inserted first.

Adjudications

This section displays the data related to the adjudication to a competitor of a tender previously defined, including the used criterion, company and the adjudication date, value and deadline. The insertion of this section depends on the previous one, that must be inserted first.

Construction Works

In Construction Works is presented the section Planning where are displayed the initial and final dates and the days of delay of the general contract phase, defined for the project. Additionally, the following section can be added:

Team

This section displays the details of those responsible for the monitoring of the construction works such as specialty, identification, contacts (name, phone and e-mail), company, position and qualification.

Building Contractors

This section displays the data of each contractor, namely, specialty, identification, contacts, license limit date and class, certificate, liability and work accident insurance, DPSS approval and consignment.

Financial Data

This section displays information about price revisions and contractual fines.

Building Permits

This section displays the data related to the building permits, namely, permit requested, approval an expiration date, permit extension, occupation license, branch lines, prior communication and PPRRGD. The information related to each of the Branch lines is inserted pressing the (x) icon and selecting the specialty, entity and the request and grant dates.

Safety Coordination

This section displays the data related to work accidents, indicating the number and then adding the date of the communication and the number of sheets.

Environmental Monitoring

This section displays the data related to the environmental monitoring through indication of date and description of the related affairs.

Provisional Reception

This section displays the data related to the provisional reception such as date, final account date, warranty period and final reception date.

Conclusion

This manual was developed with the purpose of helping users, whether project managers or owners of the work. Throughout the document we want to clarify doubts about the use of the platform.

In an early stage we have characterized the basic functionalities and concepts to take into account when using **buildtoo**.

The main purpose is to explain how to manage your projects this way, in an initial phase, the focus was to address the steps necessary to access the platform.

Later, we clarified how to create a project, insert content, edit, delete and clone. After the creation of the project the focus of the manual was to teach the user to use the work tools that the platform provides such as diary, changes, approvals, payment plan, phase management, schedule, documents and gallery.

We hope that, with this user manual, we have clarified any doubts about the use of the platform, as well as helped with the management of the inserted projects. For more information see our website https://buildtoo.com/ and our blog https://blog.buildtoo.com/.

If you have any doubts about the functionalities of the platform, please contact us by e-mail at cs@buildtoo.com or by telephone at +351 934 567 850.

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