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# **CONTENTS**

CHAPTER 1 — INTRODUCTION TO THE DEFECTS MODULE	5
1.1 Defects Module	5
1.2 Terminology	5
CHAPTER 2 — PROJECT INSPECTION LIST SET-UP AND CONFIGURATION	7
2.1 Creating an Inspection List	7
2.2 Removing an Inspection List item	11
2.3 Editing an Inspection List item	12
2.4 Duplicating an Inspection List item	. 14
2.5 Adding Drawings to Inspection List Items	17
2.6 Exporting a Project Inspection List	
2.7 Import Template	20
CHAPTER 3 — MANAGING THE DEFECTS PROCESS	. 21
3.1 Generating New Defects	. 21
3.1.1 Logging of Defects on the Web Application	. 21
3.1.2 Defect Module on Mobile Devices	
3.2 Issuing a Defect Notice to Sub-Contractors	. 25
3.3 Updating Defects and Re-Inspection	27
CHAPTER 4 — DEFECTS REPORTING	29
4.1 Details report	29
4.2 Details – QR Code report	30
4.3 Details – By Contractor report	31
4.4 Summary – By Contractor, By Area report	32
4.5 Defects Without Assigned Responsible Sub Contractors report	. 33
4.6 Defect Inspections – Overdue Defects report	. 33

CHAPTER 5 — SECURITY SETTINGS	35
CHAPTER 6 — ADDITIONAL OPTIONS	37
6.1 Project settings	37
6.1.1 Default Day to Rectify Defects	37
6.1.2 Mark New Defect Entries	37
6.1.3 Rank Captions	37
6.1.4 Automatic Numbering	38
6.2 Exporting Defects	38
6.3 Defect Notifications	39
6.4 Replace Inspector / Replace Sub Contractor	40
6.5 Key Contacts	40

Defect Module User Guide 1.1 Defects Module

# CHAPTER 1 – INTRODUCTION TO THE DEFECTS MODULE

1.1 Defects Module	5
1.2 Terminology	5

#### 1.1 DEFECTS MODULE

InEight Document's Defects module facilitates the easy tracking and managing of defects that may arise through a project. This module manages the process of building inspection lists, as well as recording and closing out defects prior to practical completion.

Features of this module include:

- Defining a Project Inspection List
- Recording defects against the Project Inspection List
- Assign each defect to a contractor for rectification
- Tracking of defects
- Exporting the Project Inspection Lists and the defects
- Inspecting amendments of each defect including claims the defect has been fixed
- Running reports on defects; and
- Resolving defects.

#### 1.2 TERMINOLOGY

The following terms are associated with the Defects module in InEight Document.

**Defects Register**: This denotes the different templates available on a project.

**Project Inspection List**: An Inspection List is a work breakdown structure of elements for Inspection and Defects management.

**Parent**: Parent refers to an Inspection List item (i.e. Building, Area, Location, etc.) that contains subsidiary items (see Child).

1.2 Terminology Defect Module User Guide

Child: Child refers to an Inspection List item (i.e. Room, Item, etc.) that is a subsidiary of a Parent item.

**Key Contact**: A user that has access to the Defects Module that is the point of contact for Defects on the project for a particular Company.

# CHAPTER 2 – PROJECT INSPECTION LIST SET-UP AND CONFIGURATION

All steps below start from the InEight Document Dashboard and assume you are familiar with the general use of the InEight Document System.

2.1 Creating an Inspection List	7
2.2 Removing an Inspection List item	11
2.3 Editing an Inspection List item	12
2.4 Duplicating an Inspection List item	14
2.5 Adding Drawings to Inspection List Items	17
2.6 Exporting a Project Inspection List	19
2.7 Import Template	20

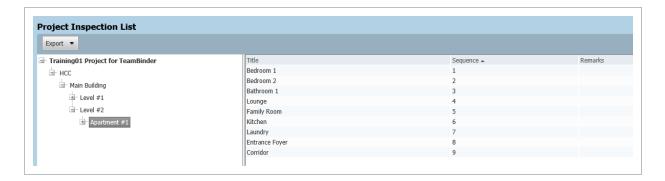
### 2.1 CREATING AN INSPECTION LIST

Before assigning defects, a Project Inspection List needs to be created. This list will contain (by default) a breakdown of Buildings, Areas, Locations, Rooms and Items, however, the Project Inspection List allows for the rebadging of these levels. It is also possible to configure the number of levels the List will use between 3 and 8 levels.

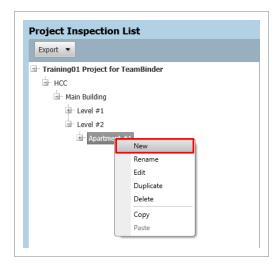
1. From the menu on the left-hand side, select the **Defects** module, then **Project Inspection List.** 



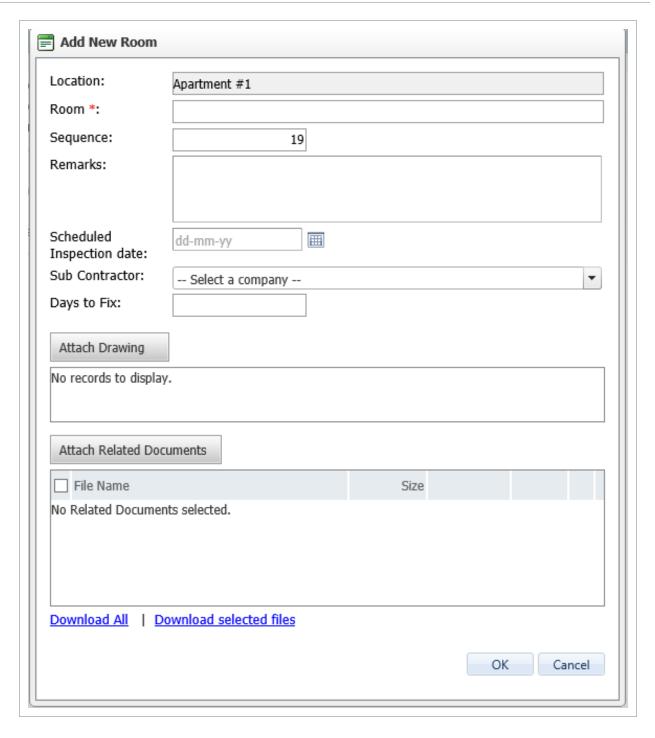
2. The Project Inspection List is displayed in a tree structure, which can be expanded and collapsed on the left side of the vertical divide. Clicking on an item within the Inspection List displays a breakdown of the locations directly under the selected item.



3. To add a new location to the Project Inspection List, right-click on the item the new location falls under (i.e. to add a Bedroom, right click on Apartment) and select **New**.



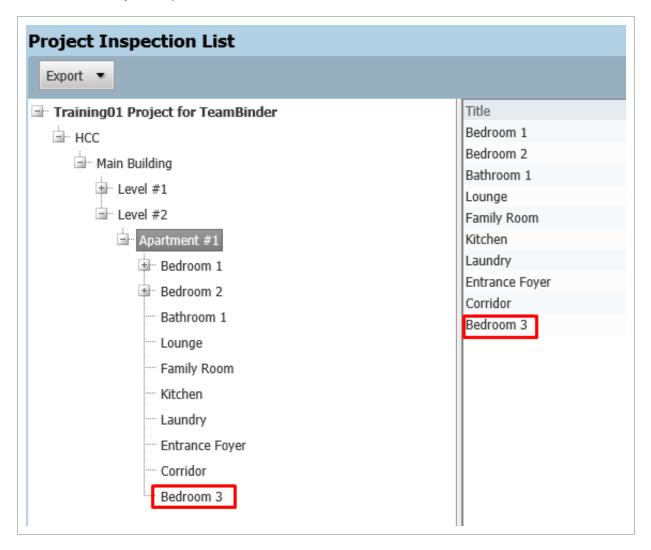
4. This opens the New Creation Screen where the details for the new location can be entered.



The New Creation Screen can capture information about the new item. For example its sequence in the Inspection List, the scheduled date for inspection, the Sub Contractor assigned for the inspection and how long they have to fix the defect, and any media related to the item including attachments of Floorplans (PDF/Images) and related supplementary documentation.

Additionally, a default Sub Contractor can be assigned to an Inspection List item, provided that it is one of the last 2 in the structure (e.g. if there are 7 levels in the Inspection List only levels 6 and 7 can have a default Sub Contractor assigned). Once a default Sub Contractor is assigned to an Inspection List item, all defects raised against that item are assigned to that Sub Contractor by default.

5. Once the information for the new location has been entered, click **OK**. The new location is then added to the Project Inspection List.

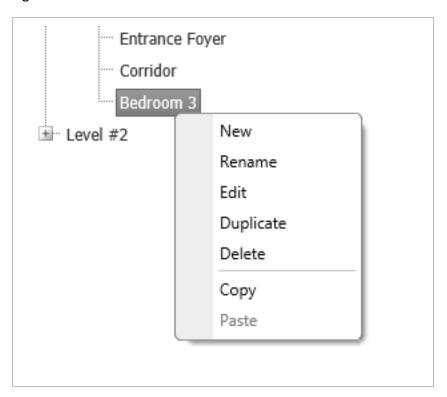


6. The Project Inspection List sequence can also be updated by dragging and dropping items to their desired locations.

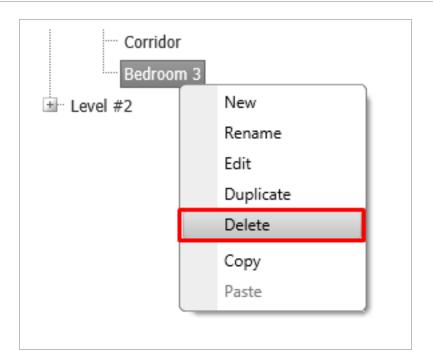
#### 2.2 REMOVING AN INSPECTION LIST ITEM

If an inspection item is added incorrectly, follow the steps below to remove that item. Note that items cannot be removed from the list if a defect has been registered against the item.

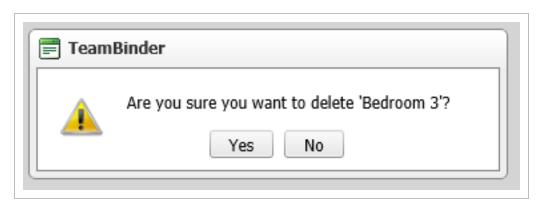
1. From within the Project Inspection List, select the Inspection List item that is to be removed and right-click it.



2. This will display a number of options. From the selection, click **Delete**.



3. InEight Document will prompt you if you want to continue. To proceed, select Yes.

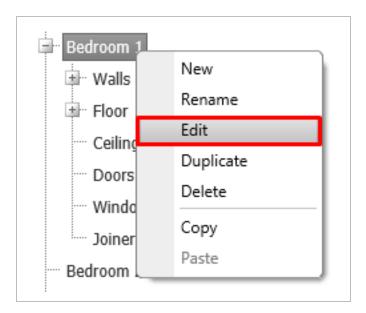


4. This will remove the selected item from the Inspection List.

#### 2.3 EDITING AN INSPECTION LIST ITEM

Should any changes need to be made to any item within the Inspection List, this can be achieved following the steps below.

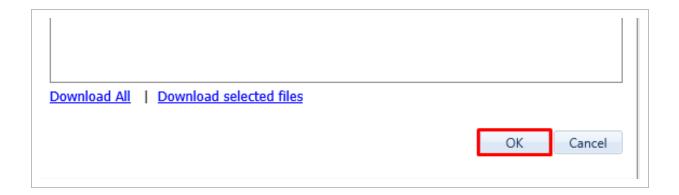
- 1. Within the Project Inspection List, select the item that is to be edited and right-click on it. This will display a number of options.
- 2. From the selection, click **Edit**.



3. This will open the Edit screen where the current details will be displayed and editable. The only field that cannot be edited is the parent item (Location in the example below).



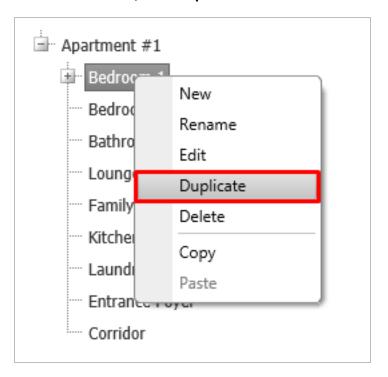
4. Once the changes are made, click **OK**. The changes will then be applied to the Inspection List item.



#### 2.4 DUPLICATING AN INSPECTION LIST ITEM

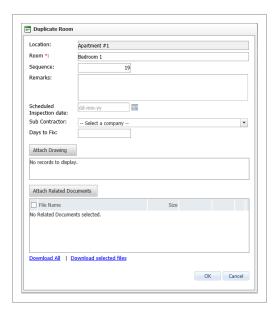
When creating an Inspection List, there may be many Areas, Locations, Rooms or Items that are similar or have the same child/sub-items. To save time, the Defects module provides the ability to duplicate these items and any child/sub-items associated with them.

- 1. From within the Inspection List, select the Inspection item to be duplicated, and right-click. This will display a number of options.
- 2. From the selection, click Duplicate.

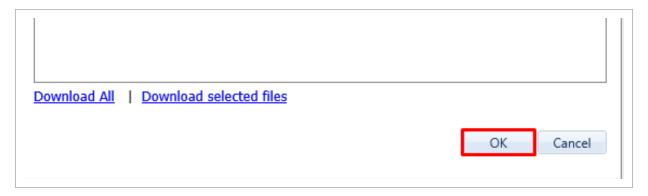


3. This will open the duplicate item screen where relevant information regarding the item can be

#### entered.



4. Once the changes have been made, click **OK** to save.



5. The Inspection List displays the new item and any duplicate sub-items from the original.

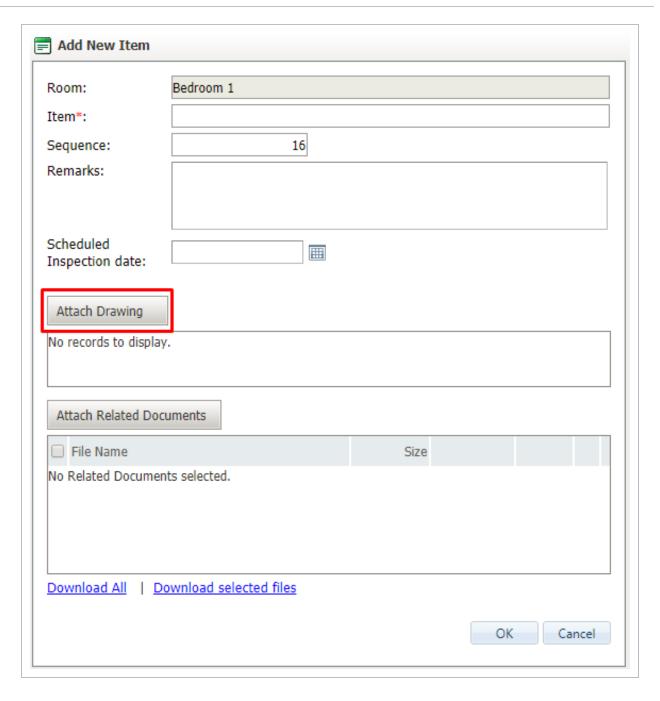


#### 2.5 ADDING DRAWINGS TO INSPECTION LIST ITEMS

Adding a drawing to an Inspection List item allows the defect inspector to further clarify the exact location of the defect. For example, a floor plan may be added as an Inspection List drawing. When capturing the defect location, pins can be placed on the drawing to pinpoint where the defect is located, in relation to the floorplan.

- 1. Right click on an Inspection List item and select **New** or **Edit**.
- 2. Select the **Attach Drawing** button, you will then be prompted to select a file to upload to the Inspection List item.

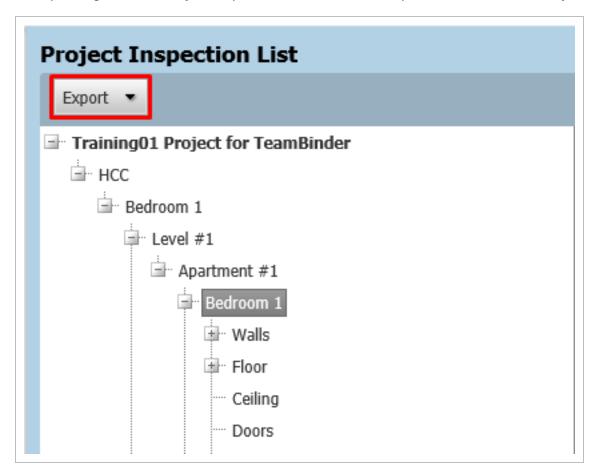
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3. Select **OK** to save your changes.

#### 2.6 EXPORTING A PROJECT INSPECTION LIST

1. To export a generated Project Inspection List, within the Inspection List select the **Export** button.



2. This will allow you to select what format the Project Inspection List is to be exported to. Hovering the mouse over the **Excel** selection, will display what is to be exported into Excel.



3. Selecting All Items exports all the information currently contained within the Project Inspection

2.7 Import Template Defect Module User Guide

List, into an Excel spreadsheet. This sheet is flat (i.e. has no grouping associated with it) and is in the order of the hierarchy in the template.

#### 2.7 IMPORT TEMPLATE

- 1. Selecting **Import Template** downloads an Excel spreadsheet to the user's local computer. This spreadsheet contains several fields and examples to assist in uploading another Inspection Lists' output into the Defects module.
- The Import Template can also be used to upload Defects to the Defect Register in bulk. This can be done by filling the template with existing items from the Project Inspection List and populating the inspection details, inspection date, and defect to be captured.
- 3. The Import Template also allows you to assign a responsible company and due date when capturing defects.

Page 20 of 40 InEight Inc. | Release 19.7

# CHAPTER 3 – MANAGING THE DEFECTS PROCESS

3.1 Generating New Defects	21
3.2 Issuing a Defect Notice to Sub-Contractors	25
3.3 Updating Defects and Re-Inspection	27

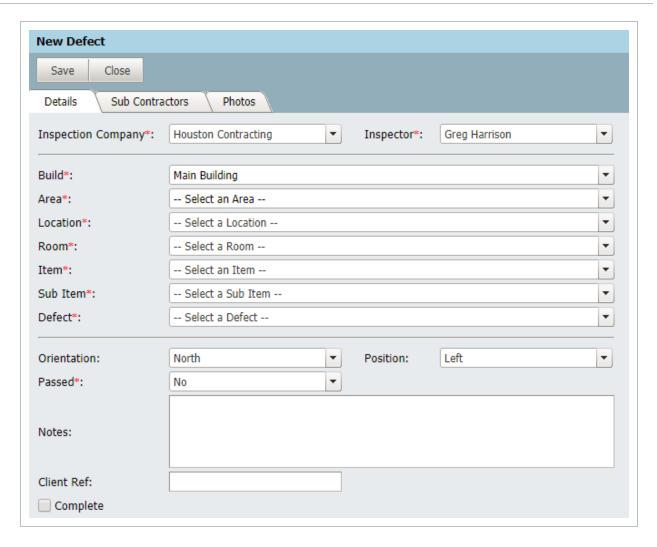
#### 3.1 GENERATING NEW DEFECTS

#### 3.1.1 Logging of Defects on the Web Application

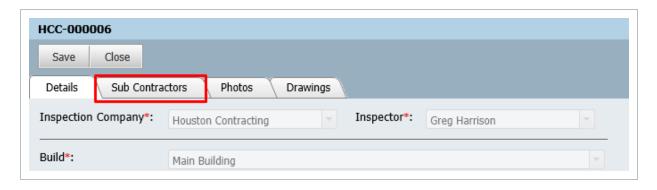
1. To create a new defect, select the **New** button at the top left of the register. This opens the Defect Information Screen.



- 2. In the Details tab you can enter in the following information:
  - Inspection Company and Inspector
  - Defect Location within the Project Inspection List and the type of defect
  - Defect Orientation and Position if further clarification is required
  - Whether the defect has passed inspection
  - · Additional notes or a Client Reference; and
  - · Mark whether the defect is complete or not.



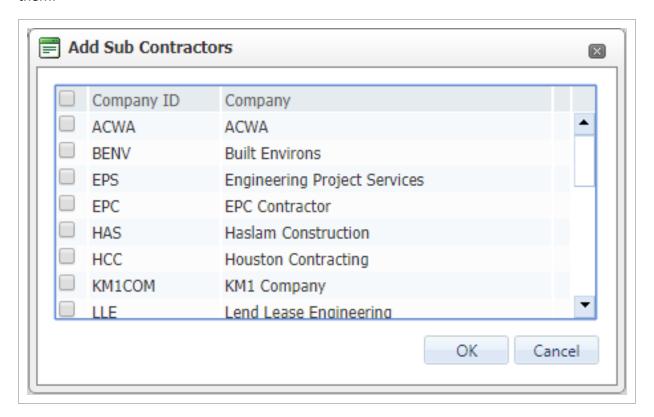
3. Next, click the **Sub Contractors** tab to open a list of all Sub Contractors assigned the current defect.



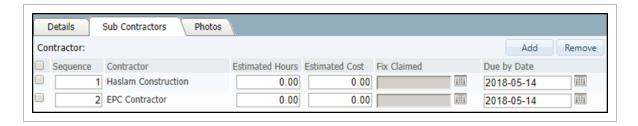
4. To issue the defect to a Sub Contractor, click on the Add button.



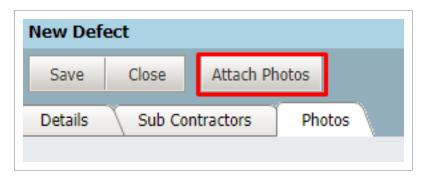
5. This opens a list of all Sub Contractors on the project. Select each Sub Contractor by checking the box next to the Sub Contractor. Once all relevant Sub Contractors are selected, click **OK** to add them.



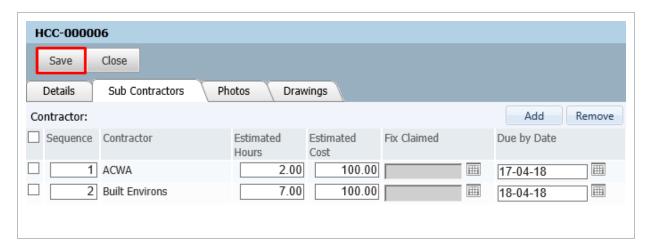
6. Next, assign a sequence to each of the Sub Contractors. The sequence determines the order in which Sub Contractors will be assigned to rectify the Defect. The first Sub Contractor is to be assigned '1'.



- 7. After selecting the Sequence, Estimated Hours for fixing the defect and Estimated Cost can be entered.
- 8. Next, the Due Date needs to be populated. This will be the date by which the Sub Contractor is required to finish fixing the defect.
- 9. Finally, there is the option of attaching related photos to the defect by selecting the **Photos** tab and then selecting **Attach Photos**.

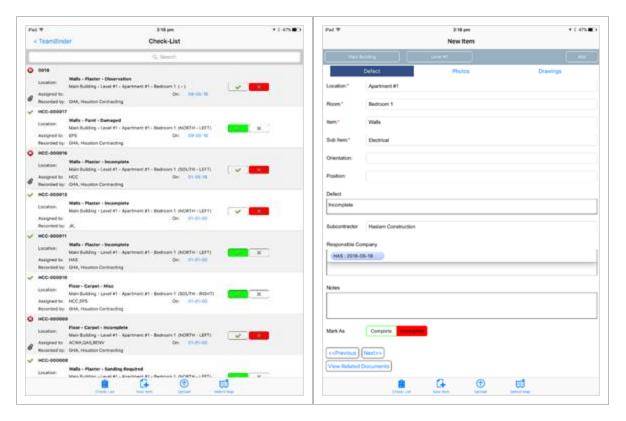


10. To save the changes made, click **Save**. This will update the defect in the register.



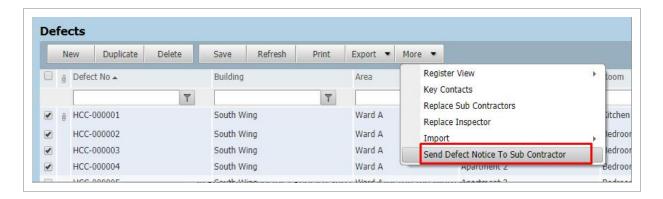
#### 3.1.2 Defect Module on Mobile Devices

Users will be able to use the current InEight Document application to access the Defects Module on mobile. The mobile version of the module allows users to view the existing Defect Register and log new defects. One additional feature unique to the mobile version is the ability to capture photos of the defect directly from the camera of the mobile device. This makes the mobile version of the module ideal for defect inspections.

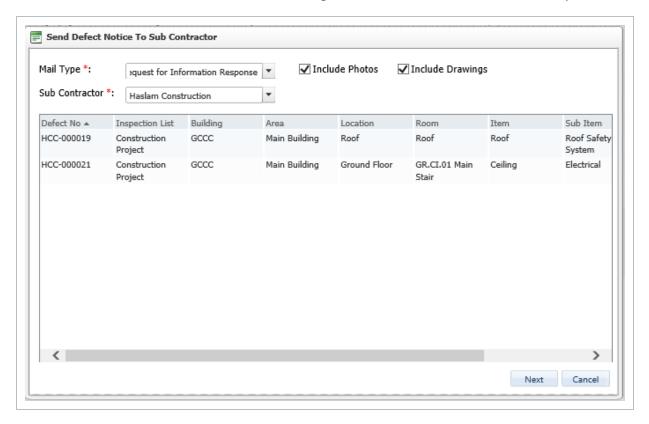


#### 3.2 ISSUING A DEFECT NOTICE TO SUB-CONTRACTORS

- 1. Select the defect(s) to be issued out to the Sub-Contractors, using the checkbox against each defect in the Defect Register.
- 2. Click on the More button and select Send Defect Notice To Sub Contractor.



- 3. This will open a new window. From here select the Mail Type for issuing the Defect Notice. A Sub Contractor that is part of the Defect will also need to be selected to be sent the Defect Notice.
  - Once the Sub Contractor has been selected, the bottom half of the window will display the list of defects from the selected list in the Defects Register, that the Sub Contractors are a part of.



- 4. Clicking **Next** will open the mail creation screen of the selected Mail Type. The 'To:' field will be populated with the Key Contacts for the selected Sub Contractor.
  - The mail will also have a 'Defect Notice' attached as a PDF. The defect notice includes a summary of the specified defects.
- 5. After the relevant information has been entered into the mail, it can be issued to the Sub

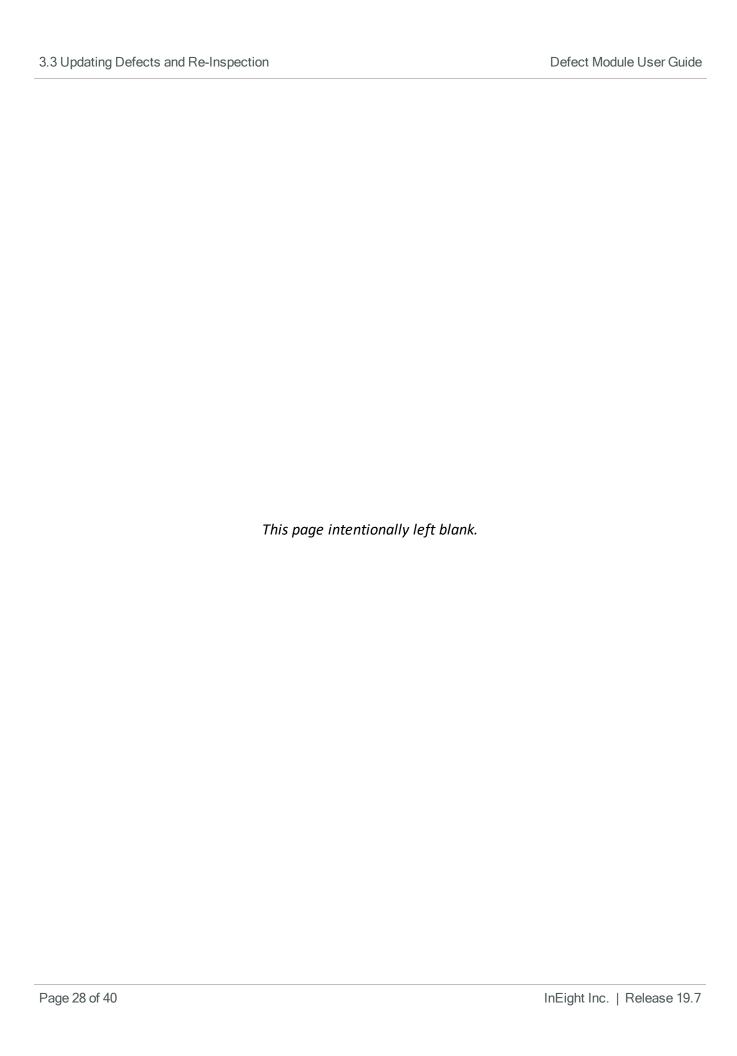
Contractors by clicking **Send**.

#### 3.3 UPDATING DEFECTS AND RE-INSPECTION

Once a company has been assigned to a defect, it appears in their Defects Register. Once they have addressed the issue they can mark the date that the defect was completed in the 'Fix Claimed' column.

The inspecting company will then be able to re-inspect the defect and confirm if the defect can be marked as complete.

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Defect Module User Guide 4.1 Details report

## **CHAPTER 4 – DEFECTS REPORTING**

There are several reports that are available for the Defects Module. Each can be accessed via the 'Defects Module' reports header, located by clicking the **Reports** button.

4.1 Details report	29
4.2 Details – QR Code report	30
4.3 Details – By Contractor report	31
4.4 Summary – By Contractor, By Area report	32
4.5 Defects Without Assigned Responsible Sub Contractors report	33
4.6 Defect Inspections – Overdue Defects report	33

NOTE

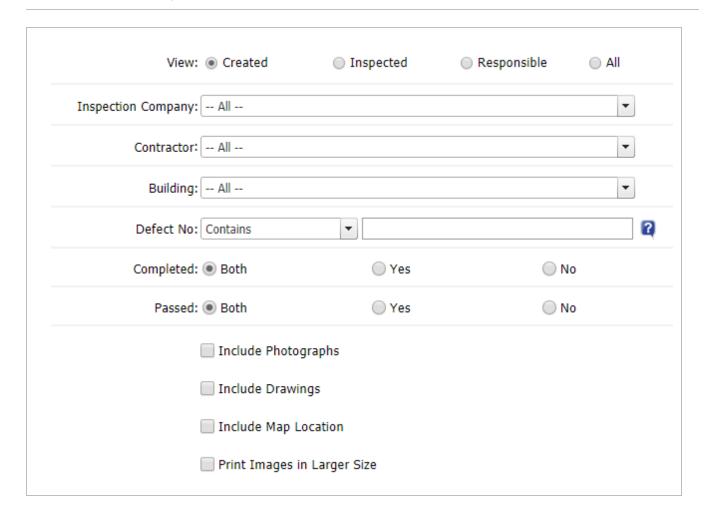
See section Exporting Defects for details on exporting the Defects Register to Excel.

#### 4.1 DETAILS REPORT

The 'Details' report provides an overview of all registered defects for the project.

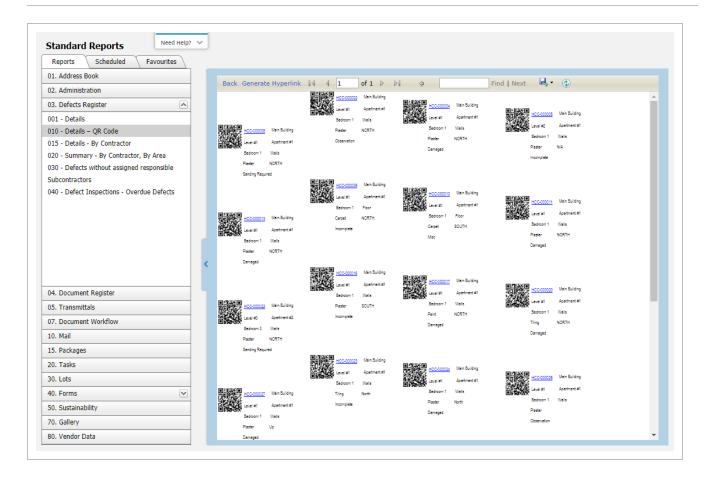
Defect Mo	Register I odule Testi	ng	eated Defect	5			Us Ru	eport No: ser: un Date: age:	03.001 Joe Fre 04-02-1	edricks			
Defect No	Inspector	SubContractor	InspectionList	Building	Area	Location	Room	ltem	Subitem	Orientation	Position	Defect	Notes
HCC-000001	Houston Contracting	EPS,QAS	Construction Project	GCCC	External Works	First Floor	F1.PA.01 Staff CarPark	Floor	Concrete	NA	NA	Needs cleaning	
HCC-000002	Engineering Project Services	HAS	Construction Project	GCCC	Main Building	First Floor	F1.Cl.01 Ramp	Ceiling	Paint	NA	NA	Colour incorrect	
HCC-000003	Houston Contracting	HCC	Construction Project	GCCC	Main Building	First Floor	F1.0A.01 Staff Room	Floor	Concrete	NA	NA	Cracking	
HCC-000004	Houston Contracting	HCC	Construction Project	GCCC	Main Building	First Floor	F1.CR.01 Lift Shaft	Doors	Lift Doors	NA	NA	Dented	
HCC-000007	Houston Contracting		Construction Project	GCCC	External Works	First Floor	F1.PA.01 Staff CarPark	Floor	Kerb & Guttering			Incomplete	
HCC-000008	Houston Contracting		Construction Project	GCCC	External Works	First Floor	F1.PA.01 Staff CarPark	Floor	Kerb & Guttering			Cracked	

Images, map location and drawings can be included in the Details report. If the map location is included, it will show the defect's GPS coordinates captured when defects are created on a mobile device. Coordinates can be displayed in Google Maps or alternative mapping systems. Drawings will be printed at the end of the report.



#### 4.2 DETAILS - QR CODE REPORT

The 'Details – QR Code' report displays information on all the registered defects for the project. The QR Code report can be printed to sticker paper allowing them to be attached to the physical defect. When scanned, these will automatically open the defect on the mobile device.



### 4.3 DETAILS - BY CONTRACTOR REPORT

The 'Details – By Contractor' report displays all the registered defects and groups them together based on the Sub Contractors that they have been assigned.

Defects Re	egister Details	- By Contractor		Report No:	03.015	
Defect Mod	ulo Toctina			User:	Joe Fredricks	
Defect Mod	ule resulty			Run Date:	04-02-19	
Filter: (Restricted	to 10000 records)			Page:	1	
SubContractor: E Services	ngineering Project					
InspectionList: Co	onstruction Project	Building: GCCC		Area: Main Building		Location: First Floor
DefectNo	Room	Item, SubItem & Orientation, Postion	Passed	Comments(Defect)	Completed	Inspection Company
HCC-000016	F1.OP.02 Outdoor Play	Floor, Hydraulic & ,	No	Drainage Missing	No	Houston Contracting
HCC-000017	F1.Cl.01 Ramp	Walls, Mechanical & NA, NA	No	Thermostat Missing	No	Houston Contracting
HCC-000018	F1.CI.01 Ramp	Floor, Rubber & NA, NA	No	Defective Finish	No	Houston Contracting
InspectionList: Co	onstruction Project	Building: GCCC		Area: External Works		Location: Ground Floor
DefectNo	Room	Item, SubItem & Orientation, Postion	Passed	Comments(Defect)	Completed	Inspection Company
HCC-000014	Eastern elevation wall	Concrete, No protection & ,	No	Flashing not protected during rendering	No	Houston Contracting
InspectionList: Co	onstruction Project	Building: GCCC		Area: External Works		Location: First Floor
DefectNo	Room	Item, SubItem & Orientation, Postion	Passed	Comments(Defect)	Completed	Inspection Company
HCC-000001	F1.PA.01 Staff CarPark	Floor, Concrete & NA, NA	No	Needs cleaning	No	Houston Contracting
HCC-000015	F1.PA.01 Staff CarPark	Floor, Kerb & Guttering & NA, NA	No	Incomplete	No	Houston Contracting

### 4.4 SUMMARY - BY CONTRACTOR, BY AREA REPORT

The 'Details – By Contractor, By Area' report provides a summary of the registered defects, grouping them by the assigned Sub Contractor and the number of Total/Claimed/Completed/ Outstanding Defects by Area (as defined in the Project Inspection List).

Defect Module Tes Filter: (Restricted to 10000	•			User Run Pagr	Date:	Joe Fred 04-02-19 1			
Contractor	InspectionList	Building	Area	Original Defect Items	Defec Fixed Comp	-	Defects Completed	Outstanding Defects	
Engineering Project Services	Construction Project	GCCC	External Works		3		2	0	3
Engineering Project Services	Construction Project	GCCC	Main Building		3		)	0	3
Sub Total		GCCC			6		2	0	(
	Construction Project				6		2	0	-
Sub Total									_

# 4.5 DEFECTS WITHOUT ASSIGNED RESPONSIBLE SUB CONTRACTORS REPORT

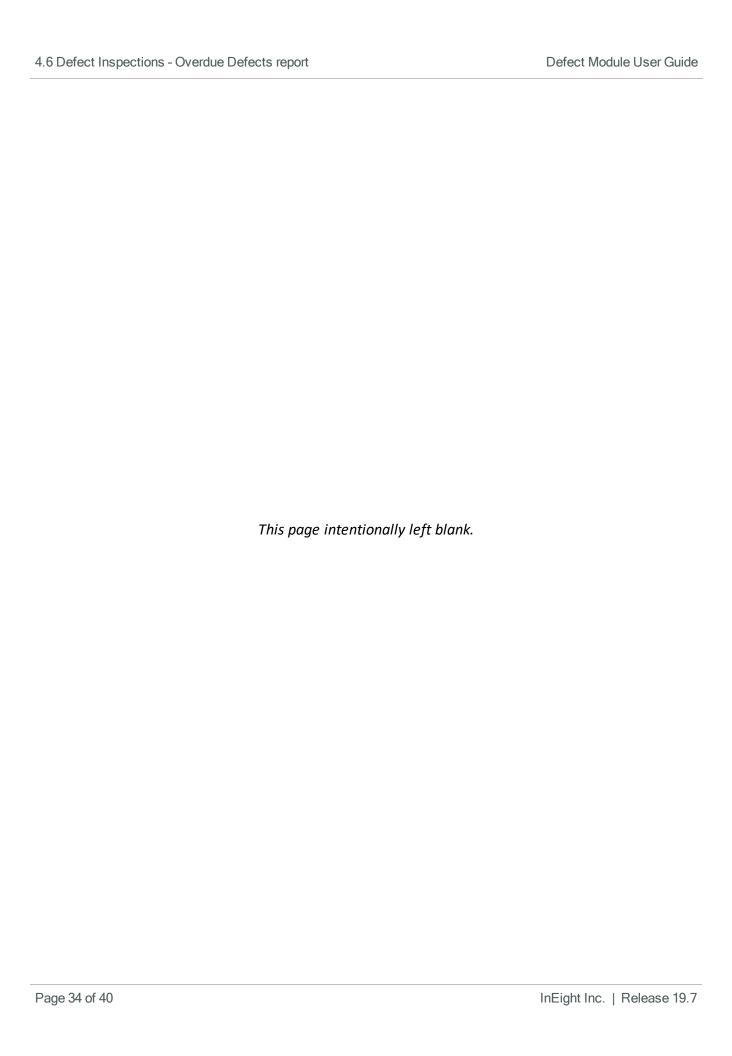
The 'Defects without assigned responsible Sub Contractors' report provides a summary of the registered defects that have not been assigned to a Sub Contractor, grouped by the Area.

Defect Module Filter: (Restricted to 10			User: Run Da Page:	e Fredricks -02-19	
InspectionList: Constru	uction Project	Building: GCCC	Area: Main Building	L	Location: Ground Floor
InspectionList: Constru DefectNo	uction Project Room	Building: GCCC Item, SubItem & Orientation, Postion	Area: Main Building Comments(Defect)	_	Location: Ground Floor
	•			Ir	

# 4.6 DEFECT INSPECTIONS - OVERDUE DEFECTS REPORT

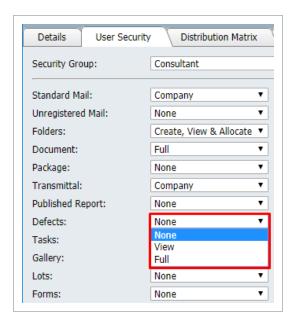
The 'Defect Inspections – Overdue Defects' report provides the details of each defect that's exceeded the Forecast completion date, grouped by assigned Sub Contractor and by Area.

Defects Re	egister Defect	Inspections - Overdue Defects	Report No:	03.040	
			User:	Joe Fredricks	
Defect Mod	ule Testing		Run Date:	04-02-19	
Filter: (Restricted	d to 10000 records)		Page:	1	
SubContractor: E Services	ingineering Project				
InspectionList: C	onstruction Project	Building: GCCC	Area: Main Building	Location: First	Floor
DefectNo	Room	Item, SubItem & Orientation, Postion	Comments(Defect)	Forecast	Inspection Company
HCC-000016	F1.OP.02 Outdoor Play	Floor, Hydraulic & ,	Drainage Missing	02-11-18	Houston Contracting
HCC-000017	F1.Cl.01 Ramp	Walls, Mechanical & NA, NA	Thermostat Missing	03-12-18	Houston Contracting
HCC-000018	F1.Cl.01 Ramp	Floor, Rubber & NA, NA	Defective Finish	03-12-18	Houston Contracting
InspectionList: C	onstruction Project	Building: GCCC	Area: External Works	Location: Grou	and Floor
DefectNo	Room	Item, SubItem & Orientation, Postion	Comments(Defect)	Forecast	Inspection Company
HCC-000014	Eastern elevation wall	Concrete, No protection & ,	Flashing not protected during rendering	01-11-18	Houston Contracting
InspectionList: Construction Project		Building: GCCC	Area: External Works	Location: First	Floor
DefectNo	Room	Item, SubItem & Orientation, Postion	Comments(Defect)	Forecast	Inspection Company
HCC-000001	F1.PA.01 Staff CarPark	Floor, Concrete & NA, NA	Needs cleaning	25-10-18	Houston Contracting
HCC-000015	F1.PA.01 Staff CarPark	Floor, Kerb & Guttering & NA, NA	Incomplete	04-12-18	Houston Contracting



## **CHAPTER 5 – SECURITY SETTINGS**

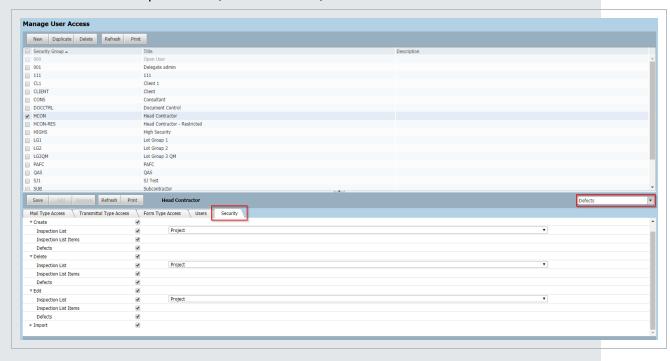
Access to the Defects Module is managed through User Security Settings.



- 1. None This means that the user will not have access to the Defects Module.
- 2. View User can access the Defects Register and Project Inspection List but will see defects assigned to or raised by their company. User with View access will not be able to create or edit any items in the Defects Register of Project Inspection List.
- 3. Full –Same access as a user with View access, however, they will also be able to raise their own Defects on the project.

NOTE

Additional security options are now available that allow Administrators to control which users can edit the inspection list, create defects, or mark defects as Claim Fixed.



Defect Module User Guide 6.1 Project settings

## **CHAPTER 6 – ADDITIONAL OPTIONS**

6.1 Project settings	37
6.2 Exporting Defects	38
6.3 Defect Notifications	39
6.4 Replace Inspector / Replace Sub Contractor	40
6.5 Key Contacts	40

#### **6.1 PROJECT SETTINGS**

#### 6.1.1 Default Day to Rectify Defects

Sets the default number of days an assigned Sub Contractor has to resolve the defect. When a new defect is created and assigned a Sub Contractor the 'Due by Date' will automatically be populated with a date in the future that is the current date, plus the specified number of days.

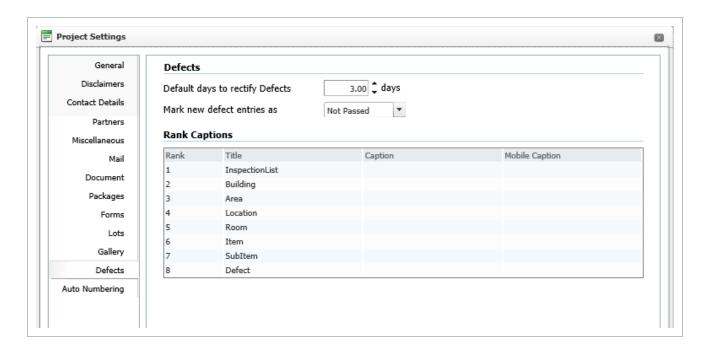
#### 6.1.2 Mark New Defect Entries

Assigns a default 'Passed' value when creating new defects.

#### 6.1.3 Rank Captions

Rank Captions allows the Primary Administrator to specify an alternate name for each of the Project Inspection List levels. This alternate name replaces the default name in all instances. This can revert back to the default name by deleting the assigned 'Caption'.

6.2 Exporting Defects Defect Module User Guide



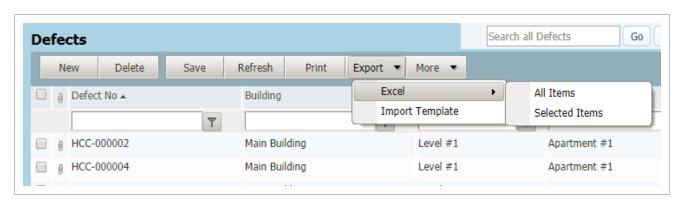
#### **6.1.4 Automatic Numbering**

Automatic Numbering can be configured for Defects in **Project Settings** under the **Auto Numbering** tab. This allows the user to control the format of defect reference numbers.

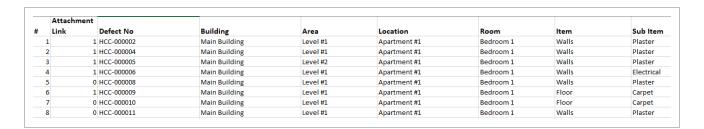
For assistance with this please contact InEight Support.

#### **6.2 EXPORTING DEFECTS**

The export tool allows you to export all items or only selected items from the Defects Register to an excel spreadsheet, which displays the metadata against each defect.

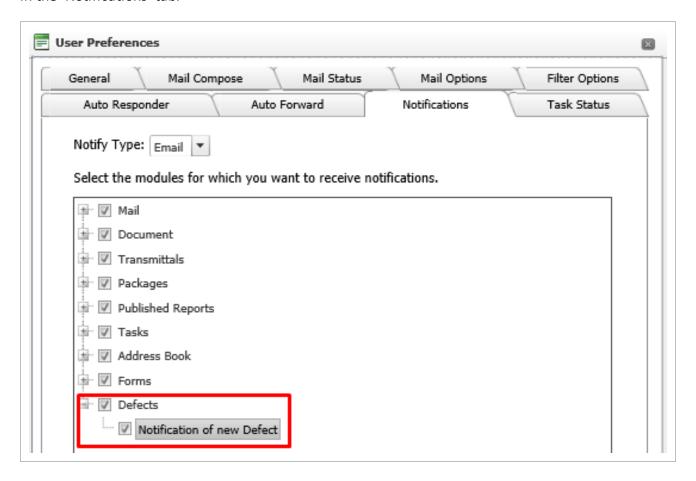


Defect Module User Guide 6.3 Defect Notifications



#### **6.3 DEFECT NOTIFICATIONS**

Notifications for the Defects Module can be disabled as required, through the User Preferences setting in the 'Notifications' tab.



# 6.4 REPLACE INSPECTOR / REPLACE SUB CONTRACTOR

There may be a time where a Sub Contractor or Inspector is unable to complete the defect, in this case administrators can 're-assign' the defect to another Sub Contractor or Inspector.

The Sub Contractor/Inspector that is assigned to a defect can be replaced by another Sub Contractor/Inspector as follows:

- 1. Select More then Replace Sub Contractor or Replace Inspector from the Defects Register.
- 2. Confirm the change is required when prompted.
- 3. The Sub Contractor or Inspector will be removed and the new Sub Contractor or Inspector will be added.

#### **6.5 KEY CONTACTS**

To specify key contacts:

- 1. Click More then Key Contacts from the Defects Register.
- 2. Click **Add**. This opens a new window. The user can then specify the Company that the Key Contact is from, along with the Key Contact (User).

