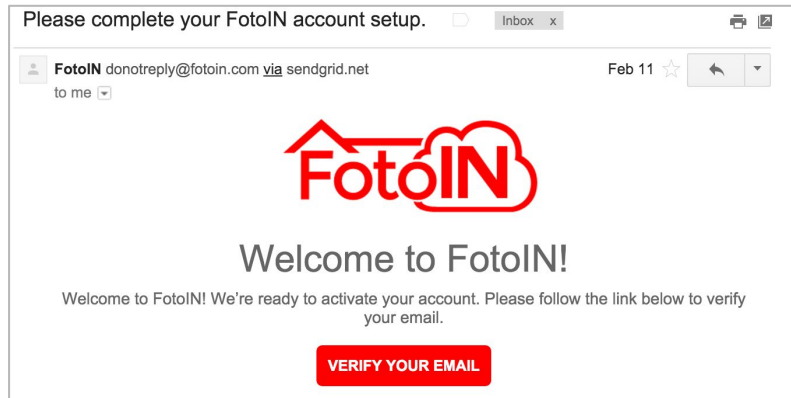# Web Portal: Create an Account

REGISTER

1. Go to www.fotoin.com, tap **Try Now** in the top right corner and fill in your contact information and tap **Register for free**.

2. Check your inbox for a welcome email and click the **Verify Account** link to complete the registration.

3. FotoIN's direct sync connectors can be set up by contacting sales@fotoin.com for further instructions.
   a. **For cloud connectors**: enter in your credentials and grant access to FotoIN.
   b. **For in-house servers**: enter in the server's URL and follow the instructions, we may contact you to complete the connection.
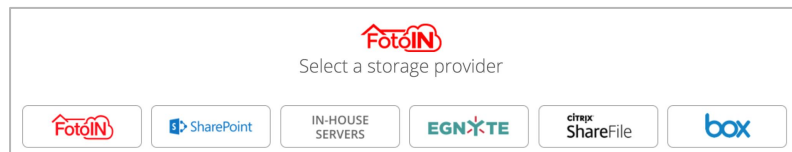

4. Once connection to your storage provider account has been established, enter in the Company Admin information. The email and password will be used to log into the web portal.

TIP: If you do not receive the registration verification email from FotoIN after 5 minutes, check the spam folder within your email account.

INVITE NEW USERS

1. Once logged into the web portal, select 'User Management' under 'Admin Controls' and click on **New User** in the top right.
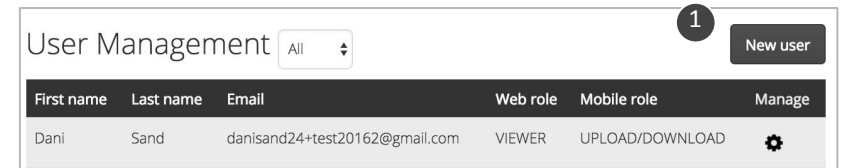
2. In the window, fill out the new user's first and last name, and email address.

3. Select their permission for 'Mobile Role':
   a. **Upload & Download:** View all company photos on mobile app
   b. **Upload Only**: View only their photos on the mobile app
   c. **None**: No access from the mobile app

4. Select their permission for 'Web Roles':
   a. **Admin**: Full access and editing capabilities on the web portal. Such as, creating new projects and editing tag categories.
   b. **Project Admin**: Access to view and manage specific projects only.
   c. **Viewer**: Access to view information only with no admin rights.
   d. **None**: No access to the web portal.
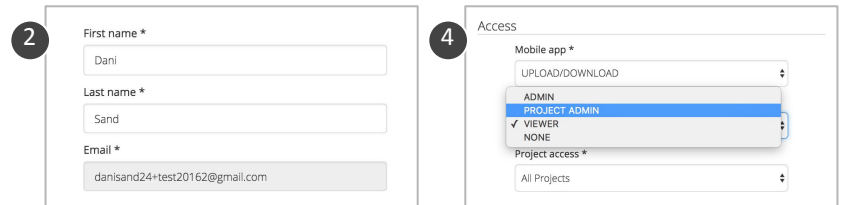
5. Once you have selected permission levels, click **Invite** at the bottom.

6. The new user will receive an invitation email that they will open on their mobile device and then they will create their own password.

TIP: Make sure the new user has downloaded the FotoIN app before opening the 'Join FotoIN' email.

Web Portal: Account Management & Dashboard

COMPANY INFORMATION

1. The first tab under 'Admin Controls' is where all of your company's information is located, such as account information.

2. To set up a recurring payment for your account, select **Company Information**. Then scroll to 'Billing' to safely and securely enter your payment information.

Tip: If needed, please contact Support to provide or update your billing information.

VERIFY STORAGE PROVIDER

1. If the photos taken on the FotoIN mobile app are not syncing to your storage account, log into the web portal.

2. Under Admin Controls, click on **Manage Storage Connector**. If connection is lost you will see a **Verify Storage** button, click on it.

3. Re-enter in your storage provider credentials to re-grant access and the connection will be restored.

Tip: You should receive a notification email from 'success@fotoin.com' every time the connection is broken. Just click the link to easily log into your account!

ACTIVITY

1. To view your company's activity across projects and team members, simply log into the web portal and it will open into your 'Dashboard'.

2. Your account's activity is organized by several usage statistics such as:
   a. Projects
   b. Users
   c. Locations
   d. Tags
   e. Date

3. Determine which statistics you want displayed by checking different criteria from the filters on the left.

4. Click **Apply** and the dashboard will show you activity statistics over time based on filters.

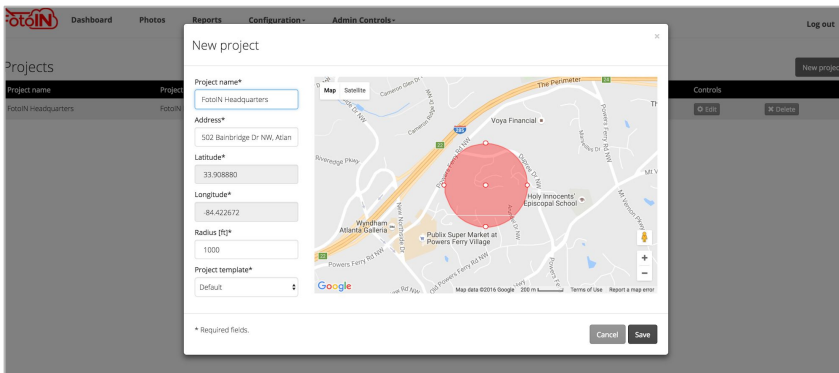5. To return to the overall company statistics, click **Reset**.

Tip: Filter through the Dashboard to keep track of specific account activity (i.e. number of reports created by a certain project).

Web Portal: Configure Projects

Creating projects under the Configurator on the web portal enables FotoIN to use GPS location for automated project identification when taking photos on the job site. The user does not have to manually input the project name for each photo and they can easily search and filter through photos by project name for faster retrieval. The project name can also be used in the filing hierarchy of your storage provider for more efficient organization.
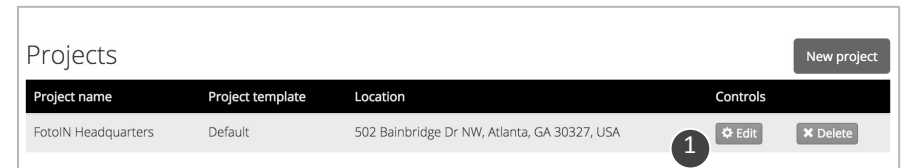
CREATE A NEW PROJECT

1. Under the Configuration, select 'Projects' and then click **New Project** above the list of existing projects.

2. Fill out the name of project in the first field and then enter in the full address: *street, city, state,* and *zip code*. Press the 'Enter' or 'Tab' key on your keyboard to refresh the latitude and longitude and find the location on the map.

3. Enter in the desired radius or drag the circles on the map to change the size. (The radius default is 1,000 feet.)

4. When you are finished entering in the project information, click **Save** to activate the new project across your company's account.

5. Finally, make sure all mobile users sync their mobile app to capture the newly created project.
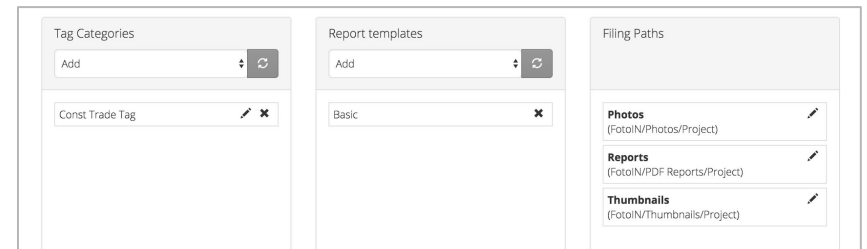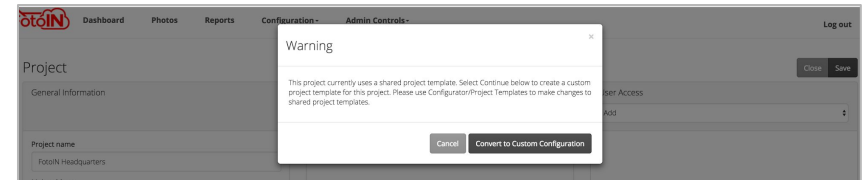
Tip: Set the project radius 200 feet larger than the project in order for photos taken on the perimeter of jobsite to have the correct project name.

MANAGE AN EXISTING PROJECT

1. Click **Edit** to the right of the project that you want to edit. Here you can edit: General Information, Locations, Users, Tags, Report Templates and Filing Paths.

2. **Tags, Report Templates & Filing Paths:** To edit per project, you will be prompted to either create a new Project Template or save the future changes to the existing Project Template. Saving Changes will be reflected in all future projects using this template.

Tip: All users should sync their apps at the beginning of the day so they have the latest account settings before they get on location.

Web Portal: Configure Tags and Filing

TAGS

1. To create a new tag category, click on **Add Category** in the left column, and type in the name of that category. Check the **Require tag selection** box to require users to select a value from this category for every photo.

2. Determine the selection option for mobile users:
   a. **Single selection**: Allows users to select one tag value only
   b. **Multiple selection**: Allows users to select many tag values

3. After saving the tag category, select it from the category's row to add new tag values. Type new tag value names above the middle row and click **Add**.

4. **Add dependent tag values:**
   a. Select the tag category and then select the tag value you wish to associate new selection options.
   b. Open drop down under Dependent Tag Values and select from existing tag categories to view the tag values below.
   c. Check the boxes for each value that you would like to be dependent. Select all of the tag values for the entire category.
   d. Click **Save Changes**.

5. All tag categories and values can be organized by dragging and dropping each one into the preferred order.

> *TIP: Each change takes effect after clicking "Save" or "Add" and does not re-organize already filed photos. New tags will appear in the mobile app after an app sync.*

FILING PATHS

Under Filing Paths, you can configure your company's folder hierarchy within your storage repository. The following steps are the same for all hierarchies.

1. **To create new folders**: Select the filing path to add a new folder to. Type the new folder's name into the text field and click **Add**. The new folder will be added to the bottom of the 'Current Folder Order' column.

2. **To add an existing folder to the current hierarchy**: drag a folder name from 'Folders Not in Use' over to 'Current Folder Order' on the left.

3. **To remove a folder from the current hierarchy:** drag the folder name from 'Current Folder Order' over to' Folders Not In Use' on the right.

4. **To organize the existing folder hierarchy**: drag and drop the folders within the 'Current Folder Order' column.

Two types of folders within your existing hierarchy are:

- **Fixed folders:** the folder's name does not change and is highlighted pink
- **Variable folders:** the name of the folder will change, based on the defining variable (i.e Project will change based on the different project names)

> *TIP: Do not create more than five folders within your folder hierarchy to save you time when searching for photos.*
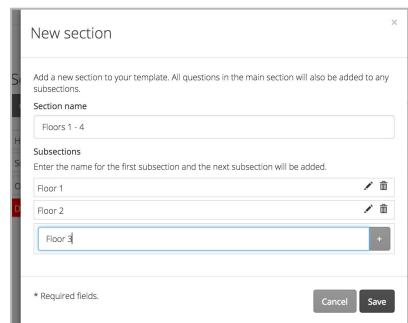
Web Portal: Configure Report Templates

Create and edit forms used to capture field reports with the FotoIN mobile app. Create and capture customized daily reports, RFI's, safety walks, and more. All reports can be shared from the app, uploaded to your storage account and accessed on the web portal.

NEW TEMPLATES & SECTIONS

Templates	Sections	Questions
Create new	Create new	Create new * Required question must be answered to complete report.
Basic report	General Information	Subcontractor
Daily Report	Daily Events	Work Completed
	Safety Compliance	Man Power

1. Click **Create new** under 'Templates' to start a new mobile form.

2. Type in the report template's name and select whether or not you would like a title page with your company's logo to be included in the report.

3. Then check all the following options of information that you would like to include in the header: *Title, Project, Address, Device* and *Date*. Click **Save**.

4. To add sections to the report, click C**reate new** under the 'Sections' column.

5. Enter in the title of the chapter and then type in the title of the first subsection and hit 'Enter'.

6. Each time you type in a title and hit enter, a new row will appear for another subsection. When finished, click **Save** in the bottom right corner.

TIP: All subsections will contain the same questions. For example: 'Floor 1' and 'Floor 2' subsections, have the same questions. So you only need to create the questions once!

NEW QUESTIONS

1. To add questions, select the desired chapter and click **Create new** under the 'Question' column.

2. Type in the question text and select an answer type:
   a. **Text**: answer with free text response
   b. **Photo:** answer with photos only
   c. **Number**: answer with numbers only
   d. **Flip Switch**: answer with one of two options
   e. **List single-choice**: answer by selecting one option from a list
   f. **List multiple-choice**: answer by selecting many options from a list
   g. **Double list multiple-choice**: answer by selecting many options from two separate lists

3. Next, simply check the box **Include Photos & Comments**.

4. To finalize a form template and make it available in the mobile app, click **Publish** and the form will be available to users after their next sync.

During the configuration of form templates, use the action buttons to:
   a. **Save** any changes made
   b. **Disable** a form on the mobile app
   c. **Reset** form template and build from the beginning
   d. **Delete** the form template

TIP: Make sure mobile users have re-started or synced their mobile app to capture the newly created forms.

Web Portal: Photo Gallery

Under the Photos tab, you will be able to view and work with all the photos, filter to segment the right photos by key variable/s, or simply search by keyword. Remember, all the field information is embedded in the photos, including tags, annotations, and comments.

FILTER AND SEARCH

1. Under the Photos tab, all of your company's photos are searchable by:
   a. Keyword(s)
   b. Projects
   c. Users
   d. Locations
   e. Tags
   f. Date

2. Select one or multiple filter options to view a specific set of photos.

3. Once you have selected the necessary filters, click **Apply** and all the photos that match your search will be displayed.

4. To return back to full view of all the photos, click Reset.
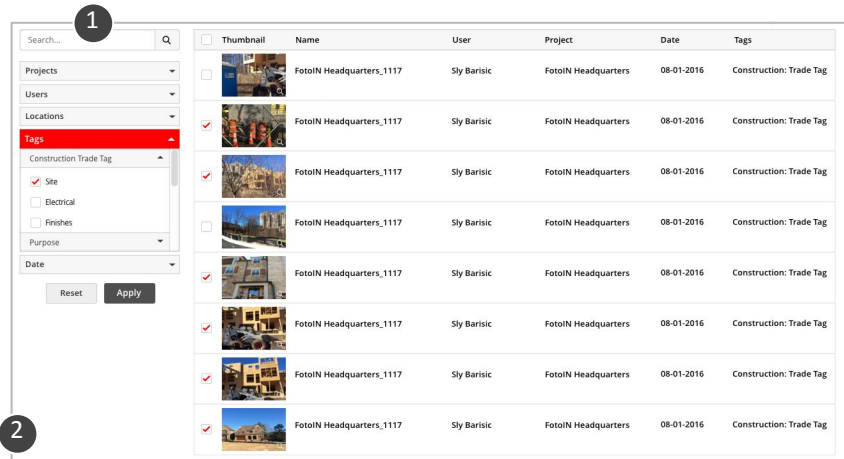
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*Tip: Click on **Map View** in the top right to switch the view of the photos from a list to pins on a map.*

ACCESS FIELD PHOTOS

1. The list of photos is designed to highlight some of the important details of all photos, such as: *Thumbnail, Name, User, Project, Date* and *Location*.

2. To view a single photo, click anywhere on the photo's row to open the preview window which contains all of the photo's key information.

3. On the right side of the preview window you will see all of the field information, annotations, tags, and comments that were captured.

4. To download a photo to your desktop, click **Download Original** above the photo in the preview window. You can also print the photo and emailing the photo will be available soon.
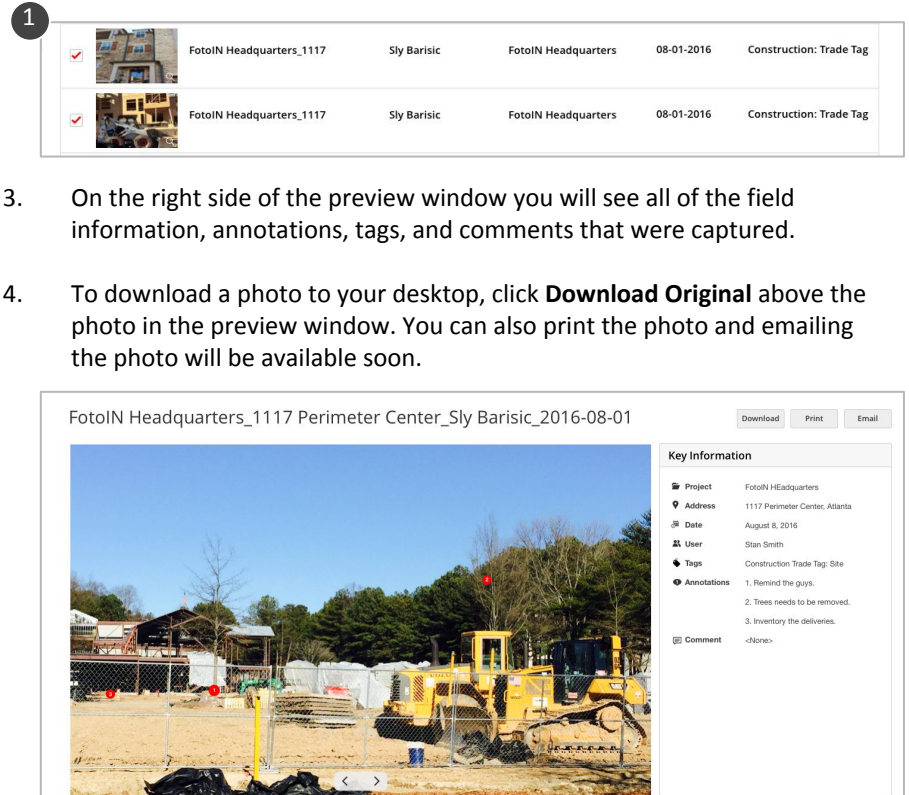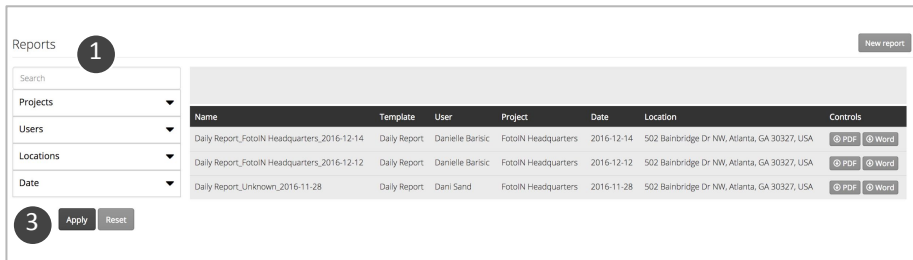

Tip: Clicking on the titles of each column in the photo table will sort photos in ascending or descending order.

Web Portal: Report Gallery

The Web Management Portal Reports tab is where you will find all reports that users created within FotoIN. All field information is embedded in the reports - as well as the photos within the reports - including tags, annotations, and comments.

FILTER AND SEARCH

1. Under the Reports tab, all of your company's reports are searchable by:
   a. Keyword(s)
   b. Projects
   c. Users
   d. Locations
   e. Date

2. Select one or multiple filter options to narrow down the list for easier access to finding specific reports.

3. Once you have selected the necessary filters, click **Apply** and all the reports that match your search will be displayed.

4. To search through your reports keywords or phrases, type into the 'Search' field above the filters and press **Enter** on your keyboard.

5. To view all of the company reports again, click **Reset**.

Tip: Search by report information when locating a specific report (questions, answers, annotations, comments etc.).

ACCESS REPORTS

1. To complete a report on the web portal, click the **Edit** button on the row of the report that you wish to finish.

2. To download a **Completed Report** from the web portal to your computer, click either the **PDF** icon or **Word** icon (plan specific), to the left of the report title.

3. Completed report can be exported into two different formats:
   a. **PDF** to use or share that report.
   b. **Word** for easy editing of the report in MS Word.

4. Double click on the preferred icon and select where you would like to save the report to your computer. Click **Save**.

5. Downloading reports will not remove them from the web portal. They will remain available for anyone with access to download as a PDF or Word Doc.
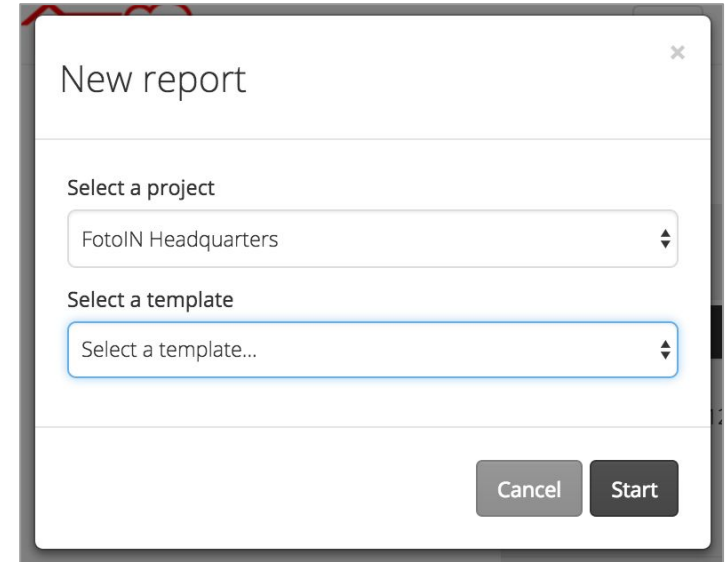
Tip: Clicking on the column names in the Reports table will sort reports in ascending or descending order.

Web Portal: Working with Reports
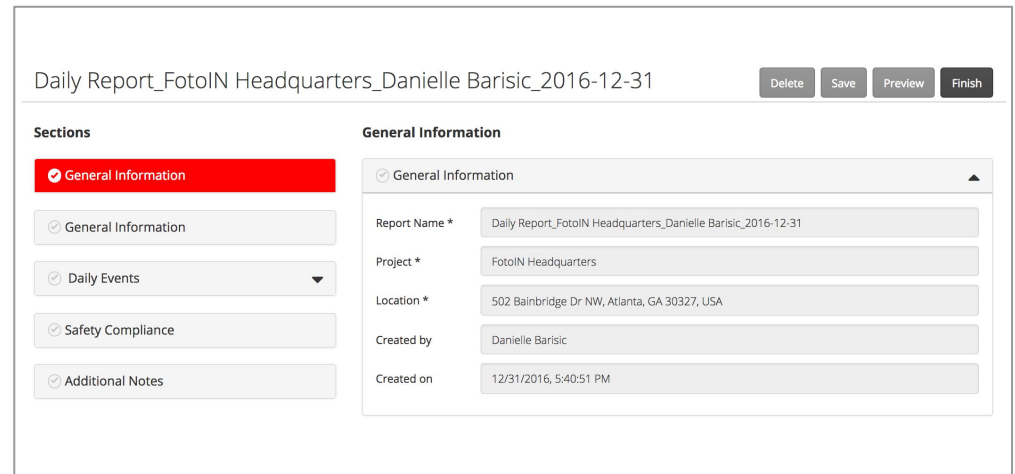
STARTING A REPORT

1. Every account has a basic report template added to every project.

2. You can create report templates for your projects on the web portal under the Admin Console depending on your FotoIN package level.

3. To start a report, tap **New Report** in upper right corner of the Reports tab, above the list of existing reports.
    a. In the pop-up window, select the project and a template from the drop down lists.

4. Then click **Start** and you will be directed to the new report's edit page.

TIP: All company reports will be accessible on the web portal when mobile users sync from their mobile devices.

New report ✕

Select a project

FotoIN Headquarters ▲▼

Select a template

Select a template... ▲▼

Cancel   Start

ANSWERING QUESTIONS

1. Every report starts with the review of the 'Key Information' section.

2. Start answering questions by entering data, selecting choices and snapping photos.

3. **To add photos to a report** tap on the 'Add Photos' button and a window will open with the photo gallery and filtering options.
    a. Select the photos you would like to add and click **Add.**

4. Tap into the **Comment** field to add comments to the question.

5. When you are finished answering that question, click the **Next** button to go straight to the next question.

Daily Report_FotoIN Headquarters_Danielle Barisic_2016-12-31   Delete Save Preview Finish

Sections   **General Information**

✓ General Information   ✓ General Information   ▲

✓ General Information   Report Name *   Daily Report_FotoIN Headquarters_Danielle Barisic_2016-12-31

✓ Daily Events   ▼   Project *   FotoIN Headquarters

✓ Safety Compliance   Location *   502 Bainbridge Dr NW, Atlanta, GA 30327, USA

✓ Additional Notes   Created by   Danielle Barisic

                              Created on   12/31/2016, 5:40:51 PM

TIP: When adding new photos to a report, remember you can take new photos as well as apply tags, add comments, and add annotations to those photos while still in the report.

Web Portal: Working with Reports

NAVIGATING CHAPTERS/SECTIONS

1. Reports can be organized into 'Chapters' or 'Sections' for easier navigation during field editing.

2. The 'Chapters/Sections' are located on the left side of the report screen.

3. Clicking on a section will open the corresponding section on the right side of the screen.

4. View sub-sections by clicking the section arrow and then clicking subsection to view it's question on the right side.

5. Close the section's subsections by clicking on the arrow again.

TIP: All sub-chapters/sub-sections pertaining to one chapter, will contain the same questions.

Daily Report_FotoIN Headquarters_Danielle Barisic_2016-12-

Sections | **Daily Events/Daily Event 1**

- ✓ General Information
- ○ General Information
- ○ Daily Events ▲
  - ✓ Daily Event 1
  - ○ Daily Event 2
  - ○ Daily Event 3
  - ○ Daily Event 4

✓ Subcontractor
○ Work Completed
Answer — Yes, all work has been complete
Comments
Photos — Add a
FotoIN Headquarters
Danielle's iPhone |
12/16/2016

SAVING DRAFTS & COMPLETING REPORTS

1. Report options are available in the upper right corner above the questions section:
   a. **Delete** the report
   b. **Save Draft** to make it available on the Web portal for further editing and completion
   c. **Preview** a PDF version of the report
   d. **Finish** the report

2. Trying to navigate away from the report will prompt a dialog to ensure that none of the work is lost.

TIP: When adding new photos to a report, remember you can take new photos as well as apply tags, add comments, and add annotations to those photos while still in the report.

Daily Report_FotoIN Headquarters_Danielle Barisic_2016-12-31   Delete | Save | Preview | Finish

Sections | **General Information**
✓ General Information | ○ General Information ▲

FotoIN   Dashboard   Photos   Reports   Admin Console   Log out   Close