

MANUAL – CREATE AND LINK BUILDING DOSSIER ITEMS

Versie 1.2



There are 2 options to create and link a building dossier item to an activity

OPTION 1 – FROM BUILDING DOSSIER SCREEN

STEP 1 – BUILDING DOSSIER SCREEN

The screenshot displays the 'Building dossiers' screen in the noclaims application. The left sidebar shows a navigation menu with 'Contractors BV' and various regions, with 'Building 01' selected. The top navigation bar includes 'Home', 'Client', and 'Supplier'. The main content area features a breadcrumb trail: 'Home > Asset details > Activities > Tickets > Building dossiers > Components > Invoices'. A table lists building dossier items, with one entry: 'Elevator Notes' (File name), 'Contractors BV » Netherlands » Region North » Building 01' (Path), 'Mr. Henk Vlug' (Username), and '03/04/2016' (Date). The table has columns for Title, File name, Path, Username, and Date. Above the table are buttons for '+ Create building dossier', 'Export to Excel', and 'Export to PDF', along with a 'Change building dossier filter' dropdown. Green callout boxes provide instructions: '1A. Go to "building dossier"' points to the 'Building dossiers' tab; 'File name of document has been added' points to the 'Elevator Notes' entry; '1B. Create building dossier (item)' points to the '+ Create building dossier' button; and 'Issue date of document. Note that this field was the previous "upload date" of the document. Issue date of each document needs to be registered. See next page.' points to the 'Date' column.


Title	File name	Path	Username	Date
Elevator Notes		Contractors BV » Netherlands » Region North » Building 01	Mr. Henk Vlug	03/04/2016

STEP 2 – CREATE BUILDING DOSSIER ITEM

Create building dossier

Asset Contractors BV » Netherlands » Region North » Building 01

Title

Issue date 

Tags

Text

Type Note
 Text
 Document
 Picture
 Link

2B. Type name of building dossier item
Year_monthday_(issue date) title of document

2A. Select type of building dossier item

2C. Register the issue date of the report

2D. Add text, if needed

2E. Link and create activities

For now Tags will be managed by Head Office (please do not add tags),

STEP 3 – LINK ACTIVITY TO BUILDING DOSSIER ITEM


Activities that will be linked are indicated in color blue + symbol

3A. Select the activities that need to be linked to this building dossier item.

Please note that there is a filter option...

Select the activities you want to add or remove

Change activity filter

Asset	Deadline		Description	Supplier	
Building 01	08/01/2017	●	Elevator- and lifting platform installations		✖ ↻ 🔍
Building 01	07/01/2017	●	Cleaning Elevators		↻ 🔍
 Building 01	01/01/2018	●	Brandblussers, Onderhoud		✖ ↻ 🔍

+ Add activity

↶ Cancel



✓ Save

3B. Save


STEP 4 – CONFIRM

Are you sure?

The link to the following item(s) will be added:

Asset	Deadline 	Description	Supplier
Building 01	01/01/2018 	Brandblussers, Onderhoud	

4A. Verify if the correct building dossier item will be added. If yes, click 'continue'. If no click 'cancel'.

 Cancel

 Continue

STEP 5 – SAVE BUILDING DOSSIER ITEM INCL. LINKED ACTIVITIES

Create building dossier

Asset Contractors BV » Netherlands » Region North » Building 01

Title

Inspectierapport

Type

- ✓ Note
- Text
- Document
- Picture
- Link

Issue date

8/23/2017



Tags

+ Add

Text

Empty text area for content.

🔗 Link and create activities (0)

🔗 Link and create components (0)

↻ Cancel

✓ Save

5A. Save

OPTION 2 – FROM ACTIVITY SCREEN

STEP 1 – ACTIVITY SCREEN

The screenshot displays the noclaims web application interface. The top navigation bar includes the noclaims logo and menu items for Home, Client, and Supplier. The left sidebar shows a hierarchical navigation menu with options for Contractors BV, Belgium, Germany, Netherlands, Demo, Region North, Building 01 (selected), Building 02, Building 03, and Region South. The main content area is titled 'Home' and features a breadcrumb trail: Contractors BV » Netherlands » Region North » Building 01. A language dropdown is set to 'English (United States)'. Below the breadcrumb, there are tabs for Asset details, Activities (selected), Tickets, Building dossiers, Components, and Invoices. A toolbar contains buttons for '+ Create activity', 'Create activity batch', 'Export to Excel', 'Export to PDF', and 'Mailing lists', along with a 'Change activity filter' dropdown. A pie chart shows the activity status distribution: 0 past deadline, immediate action required (red); 1 approaching deadline, action required soon (yellow); 1 scheduled, no action required (green); and 1 past deadline, no action required by law (blue). A legend explains these categories. Below the chart is a table of activities with columns for Asset, Deadline, Description, Category, and Supplier. The table lists three activities for Building 01: 'Cleaning Elevators' (deadline 07/01/2017), 'Elevator- and lifting platform installations' (deadline 08/01/2017), and 'Brandblussers, Onderhoud' (deadline 01/01/2018). Two green callout boxes with arrows point to the 'Activities' tab and the 'Brandblussers, Onderhoud' row, with instructions '1A. Go to 'Activities'' and '1B. Select (click on) an existing activity.' respectively.

Home

English (United States)

Asset details **Activities** Tickets Building dossiers Components Invoices

Contractors BV » Netherlands » Region North » Building 01

+ Create activity Create activity batch Export to Excel Export to PDF Mailing lists Change activity filter

0 past deadline, immediate action required
1 approaching deadline, action required soon
1 scheduled, no action required
1 past deadline, no action required by law

Asset	Deadline		Description	Category	Supplier
Building 01	07/01/2017	●	Cleaning Elevators	Services » Lift and Conveyor Installations	
Building 01	08/01/2017	●	Elevator- and lifting platform installations	Services » Lift and Conveyor Installations	
Building 01	01/01/2018	●	Brandblussers, Onderhoud	Services » Fire and Lightning Protection	Leverancier X

1A. Go to 'Activities'

1B. Select (click on) an existing activity.









STEP 2 – BUILDING DOSSIER ITEMS

■ Activity details of Brandblussers, Onderhoud

2A. Click on 'link building dossier items'.

i This activity is active, but direct action is not required.

Activity details 	
Location:	Contractors BV » Netherlands » Region North » Building 01
Date created:	31 July 2017
Current status:	Active
Deadline:	1 January 2018
Description:	Brandblussers, Onderhoud
Recurring:	yes
Category:	05 Services » 05.11 Fire and Lightning Protection
Tags:	Health and Safety
Supplier:	Leverancier X
Code:	05.11
Required by law:	yes
Laws and regulations:	Bouwbesluit 2012, NEN 2559
Related components (0)	
Related building dossier items (0)	

Actions
 Edit details
<input checked="" type="checkbox"/> Change status
 Move activity
 Copy activity
<hr/>
 Components
 Building dossier items
 Add attachment
 View history
<hr/>
 Delete activity

Close 



STEP 3 – SELECT BUILDING DOSSIER ITEM

Symbol indicates that building dossier item has been linked (color blue and symbol).

3A. Select 'building dossier items' from the list. Multiple building dossier items can be selected at once.

Select the building dossier items you want to add or remove

Change building dossier filter

Title	File name	Path	Date
 Elevator Notes		Contractors BV » Netherlands » Region North » Building 01	03/04/2016 

+ Add building dossier item

Cancel

Save


If the building dossier item is not in the list, click '+ Add building dossier item'.

3B. After selecting the building dossier item(s), click 'save button'

STEP 4 – VERIFY AND CONFIRM

Confirm

The link to the following item(s) will be added

▲ Title	Path
 Elevator Notes	Contractors BV » Netherlands » Region North » Building 01

4A. Verify if the correct building dossier item(s) will be added. If yes, click 'continue'. If no click 'cancel'



↶ Cancel

✓ Continue




STEP 5 – BUILDING DOSSIER ITEMS HAVE BEEN LINKED





■ Activity details of Brandblussers, Onderhoud


i This activity is active, but direct action is not required.

Activity details 	
Location:	Contractors BV » Netherlands » Region North » Building 01
Date created:	31 July 2017
Current status:	Active
Deadline:	1 January 2018
Description:	Brandblussers, Onderhoud
Recurring:	yes
Category:	05 Services » 05.11 Fire and Lightning Protection
Tags:	Health and Safety
Supplier:	Leverancier X
Code:	05.11
Required by law:	yes
Laws and regulations:	Bouwbesluit 2012, NEN 2559
Related components (0)	
Related building dossier items (1) 	

Actions

-  Edit details
- Change status
-  Move activity
-  Copy activity

-  Components
-  Building dossier items
-  Add attachment
-  View history

-  Delete activity

5A. Click on triangle symbol to see the linked building dossiers items

Number indicates how many building dossier items have been linked

Close 

STEP 6 – SEE LIST AND CLOSE

■ Activity details of Brandblussers, Onderhoud

i This activity is active, but direct action is not required.

Activity details

Location: Contractors BV » Netherlands » Region North » Building 01

Date created: 31 July 2017

Current status: Active

Deadline: 1 January 2018

Description: Brandblussers, Onderhoud

Recurring: yes

Category: 05 Services » 05.11 Fire and Lightning Protection

Tags: **Health and Safety**

Supplier: Leverancier X


Code: 05.11

Required by law: yes




Laws and regulations: Bouwbesluit 2012, NEN 2559





Related components (0)


Related building dossier items (1) ▲

Type	Title	Asset	Date
	Elevator Notes	Building 01	3/4/2016

Actions

-  Edit details
- Change status
-  Move activity
-  Copy activity

-  Components
-  Building dossier items
-  Add attachment
-  View history

-  Delete activity

6A. Click 'close'.

Close 