

MANUAL 5 – CREATE AND/OR LINK BUILDING DOSSIER ITEMS TO ACTIVITIES

Version 2.0

OPTION 1 – VIA BUILDING DOSSIER SCREEN

STEP 1 – BUILDING DOSSIER SCREEN

noclaims Home Client Supplier

English (United States)

Contractors BV

- Belgium
- Germany
- Netherlands
- Demo
- Region North
- Building 01**
- Building 02
- Building 03
- Region South

Home

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

+ Create building dossier Export to Excel Export to PDF

Change building dossier filter

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

1A. Go to 'building dossier'

1B. Create building dossier (item)

Issue date of document.

STEP 2 – CREATE A BUILDING DOSSIER ITEM

Create building dossier

Asset Contractors BV » Netherlands » Region North » Building 01

Title

Issue date 

Type

- ✓ Note
- Text
- Document**
- Picture
- Link

Tags

Text

2B. Register 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 (or create) activities

 Link and create activities (0)

 Link and create components (0)

 Cancel

 Save

STEP 3 – LINK ACTIVITY(IES) TO A BUILDING DOSSIER ITEM

Select the activities you want to add or remove

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

Please note that there is a filter option...

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

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

If the activity is not in the list 'add (create) activity'.

3B. Save


STEP 4 – VERIFY AND CONTINUE

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 – VERIFY AND CLOSE

Inspectierapport



Building dossier item details

Asset Multi Corporation » MULTI Example Country » Building 01
9/28/2017

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







Tags

Related components (0)
Related activities (1)

Description	Asset	Deadline	^	Supplier
Brandblussers, onderhoud	Building 01	01/01/2018	●	 

Number indicates how many building dossiers items have been linked

Actions

-  Edit details
-  Move building dossier item
-  Copy building dossier item
-  Components
-  Activities
-  Delete building dossier item

6A. Click 'close'. 

OPTION 2 – VIA ACTIVITY SCREEN

STEP 1 – ACTIVITY SCREEN

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

1A. Go to 'Activities'

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

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

Or create a new activity

STEP 2 – GO TO ‘LINK BUILDING DOSSIER ITEMS’









■ 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 (0)	

Actions

-  Edit details
- Change status
-  Move activity
-  Copy activity
-  Components
-  **Building dossier items**
-  Add attachment
-  View history
-  Delete activity

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

Close 




STEP 3 – LINK BUILDING DOSSIER ITEM(S) TO AN ACTIVITY

Symbol indicates that building dossier item is/will be linked (color blue and symbol).

Select the building dossier items you want to add or remove

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

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

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

Cancel

Save

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

STEP 4 – VERIFY AND CONTINUE

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 linked. If yes, click 'continue'. If no click 'cancel'

 Cancel  Continue

STEP 5 – VERIFY 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
Health and Safety

Leverancier X 05.11

Required by law: yes

Laws and regulations: Bouwbesluit

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

Number indicates how many building dossiers items have been linked

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

6A. Click 'close'.

Close