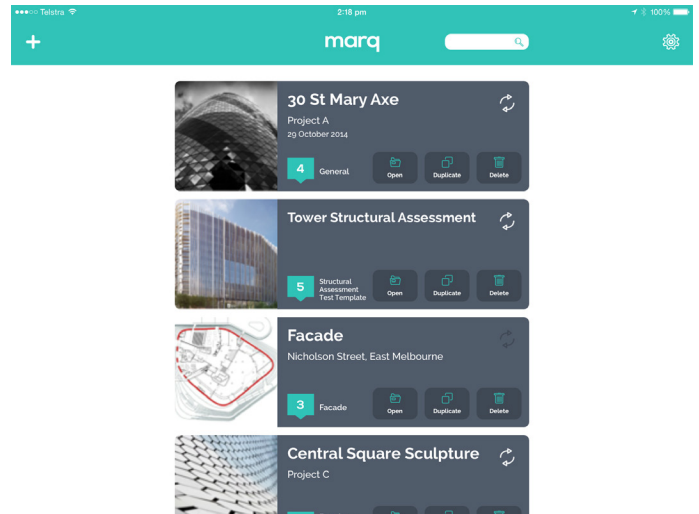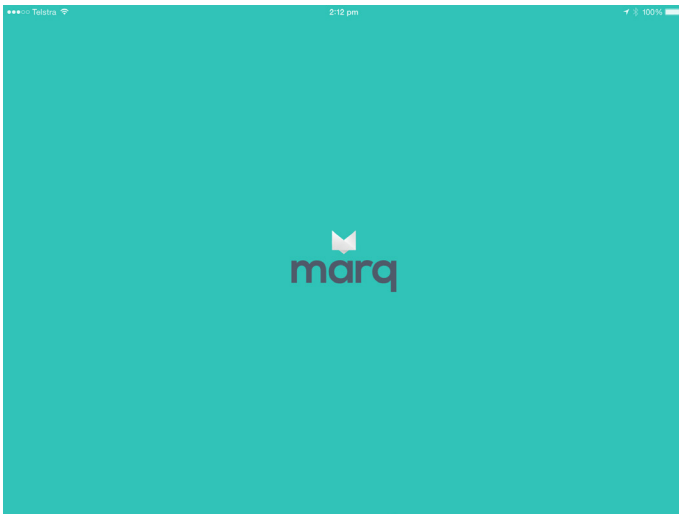# marq

## Quick Start

## User Guide
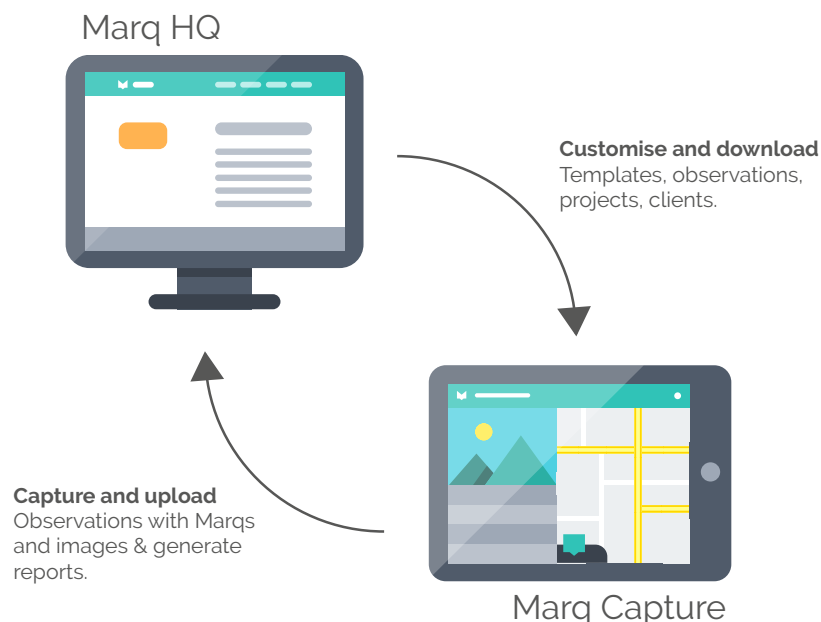
# 1. What is Marq





Marq is a sophisticated platform that allows you to quickly and accurately capture data in the field, manage it easily online and communicate it clearly.

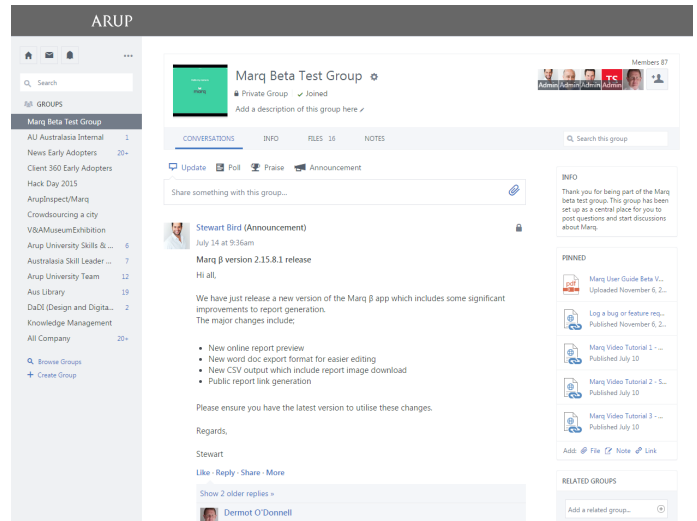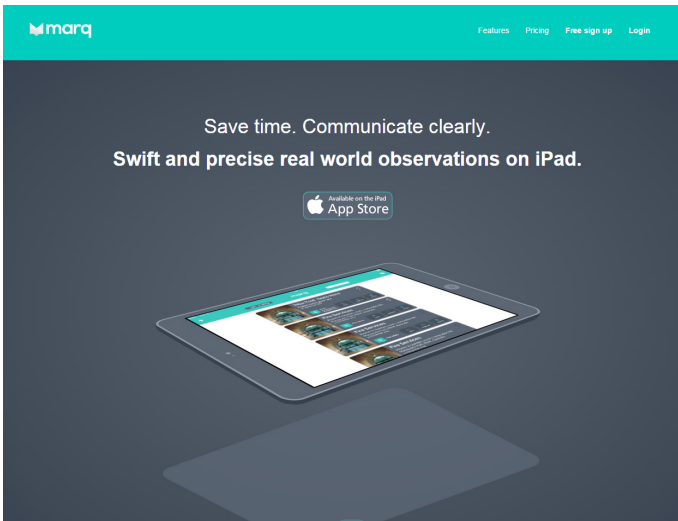Marq is made up of 3 major parts - Marq HQ, Marq Capture & Marq API.

The Marq HQ web interface gives you the ability to manage all your on-site activities in one place. Its sophisticated  template builder allows you customise how you collect data on site. Marq HQ also gives you the ability to effectively manage your project's workflow by coordinating the activities of your project team.

The Marq Capture iPad application provides a beautiful and easy to use interface to record that data in the field using the templates you create on Marq HQ. Once data has been captured, Marq Capture allows you to push that data back up to Marq HQ where you can save it, edit it and communicate it easily.

Marq is the complete management system for all your on-site activities.

Marq HQ



**Customise and download**
Templates, observations, projects, clients.

**Capture and upload**
Observations with Marqs and images & generate reports.

Marq Capture

# 2. Support



There are a number of support channels available to Marq users.

For general questions and help using Marq please first head to the Marq Group on Yammer. The group has been set up as a central place were questions and discussions are visible to all. You can access the group here - Yammer Marq Beta Test Group.

For direct assistance please contact the Marq team at Observeapp.support@arup.com.

# 3. An overview of Marq Capture

The Marq Capture iPad app is the tool you will use to collect data whilst out in the field. It is where your custom built templates are used to help streamline the way you collect information.

This section is a quick introduction to the app and will help you become familiar with the interface and its functionality.

## The Login Screen
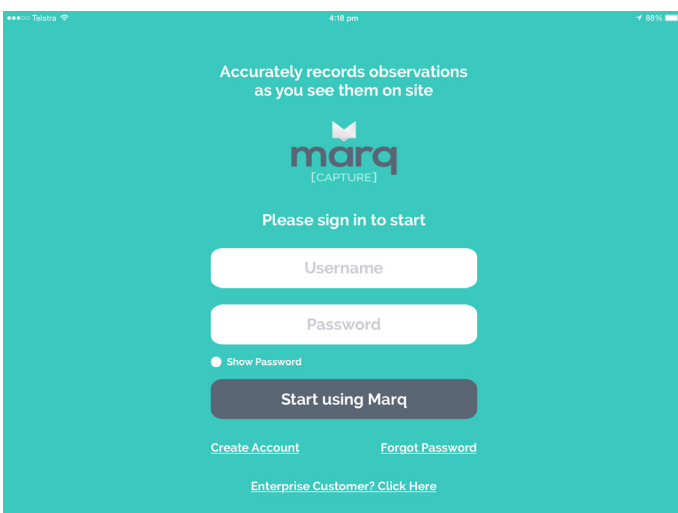


The first screen you will see when you open the app is the login screen. This is where you use your Marq credentials to start using the app.

In order to verify your account when logging in for the first time, the iPad needs to be connected to the internet. Please ensure that you are logged into the app before heading out to a site where no wifi, 3G or 4G internet is available.
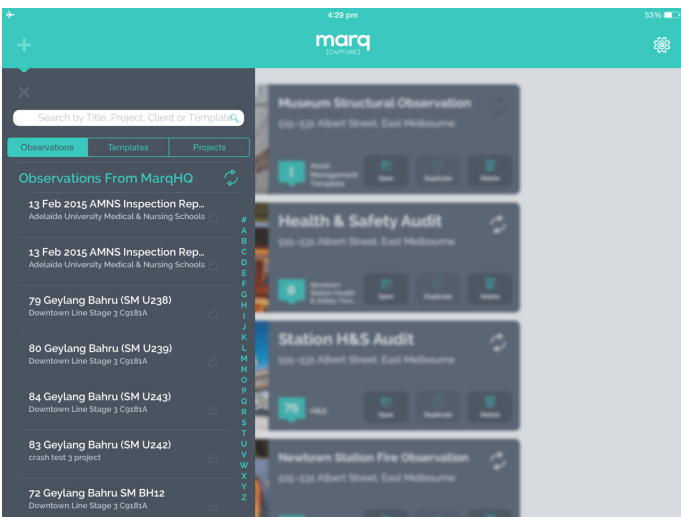
You can log in using your normal Arup details by first selecting the Enterprise link, entering "Arup" as the Domain, then entering your details.

# The App Dashboard
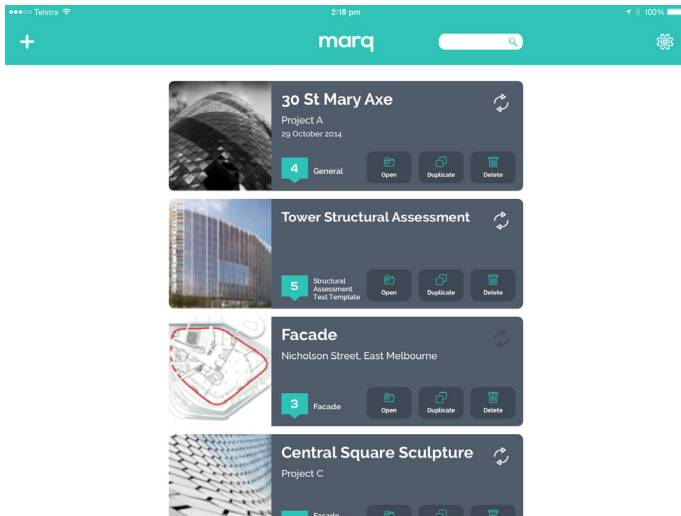


Once logged into the app you will be taken to your dashboard. This is where your active observations will be available for you to access quickly and easily.

# The Marq HQ Menu



At the top left of the screen you will see a plus icon, this gives you access to the Marq HQ menu.

The menu is divided into 3 sections made up of Observations, Templates and Projects. This is your window to your Marq HQ where you can sync observations and templates from the HQ and download them on to your iPad. A search bar is also available above the tabs making it easy to find templates, observations and projects by simply entering keywords.

# The Settings Menu
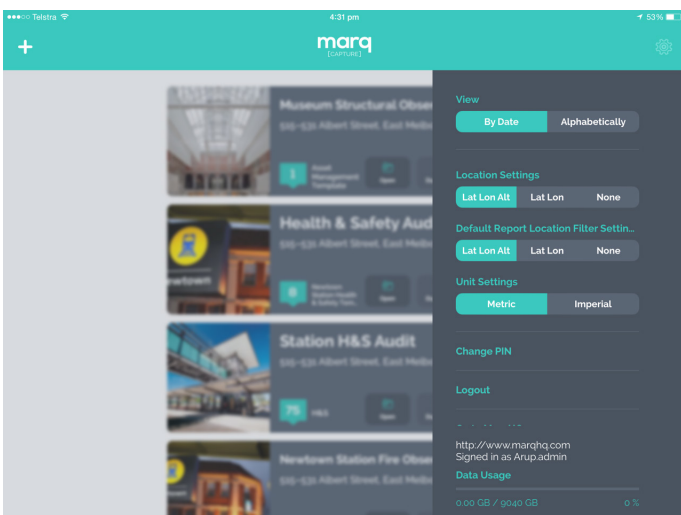


At the top right of the screen you will see a cog icon, this gives you access to the Marq Capture settings menu. This menu allows you to adjust your;

- View – How observations on your dashboard are ordered
- Location settings – What GPS co-ordinates are recorded for newly taken photos
- Unit settings – Whether you would like to work in metric or imperial units

The menu gives you links to log out of your account on the app, head to the Marq HQ and find out more information about Marq.

# 4. An overview of Marq HQ
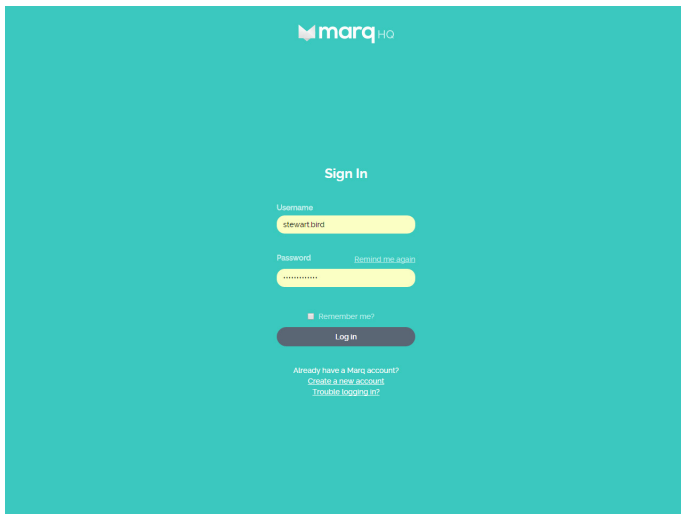


Marq HQ is your Marq control panel. This is the web management system that allows you to create and control everything that you will use the Marq app for.

Marq HQ allows you to management your account, create and manage project teams, create and edit templates and save and manage your observations.
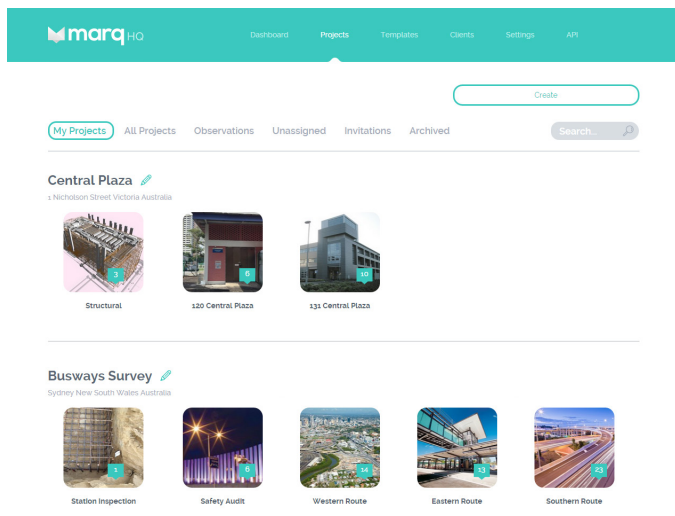
You can access the Marq HQ by heading to MarqHQ.com in your web browser on a desktop or laptop computer

## The Dashboard

The first page you will see when you log into the Marq HQ is the dashboard. This screen provides you with quick links to different areas of Marq HQ as well as meters to monitor your account's data and Marq usage.
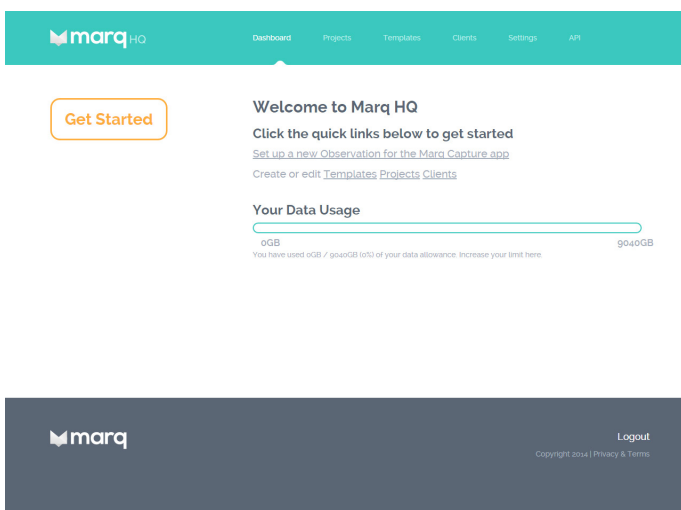
# Projects



Projects help manage your observation activities. Under the projects section you can manage your project team and the observations they undertake.

The My Projects section displays all the projects you are currently working on and the observations associated with each. The All Projects section are all the projects being undertaken by your organisation. From the dashboard you can create new projects, edit existing projects, view archived projects and view your projects invitations that others have sent you.

# Templates
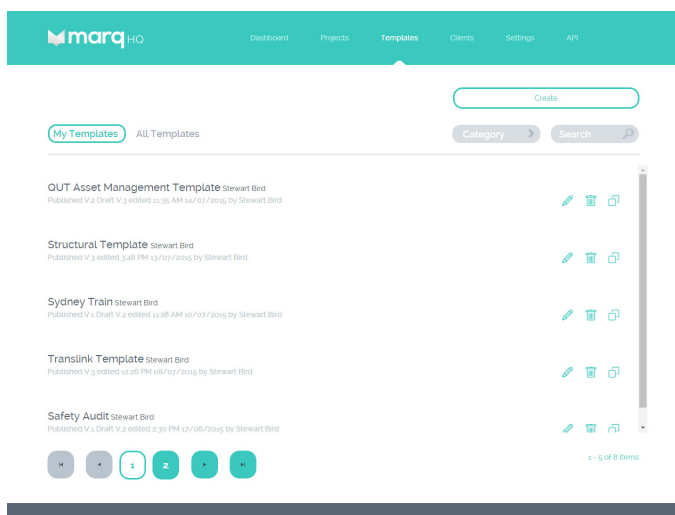


The templates section allows you to create new templates or search, edit, copy and delete existing templates. The template list is divided into two sections. The My Templates section displays template you have created or are currently working on, and the All Templates section displays templates created by everyone in your organisation.
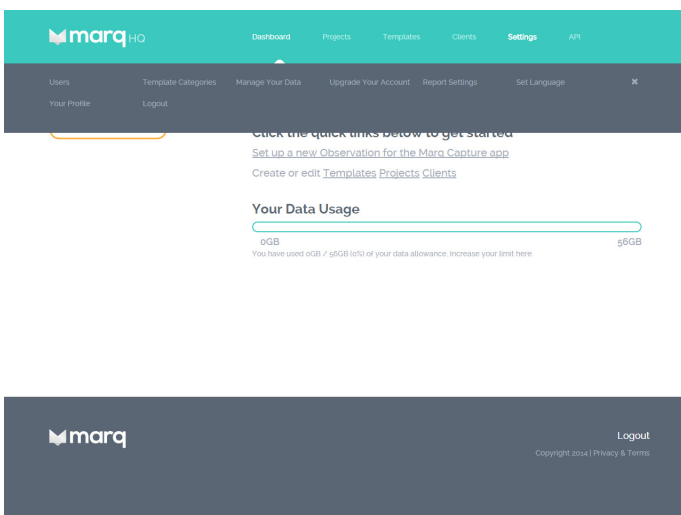
# Clients
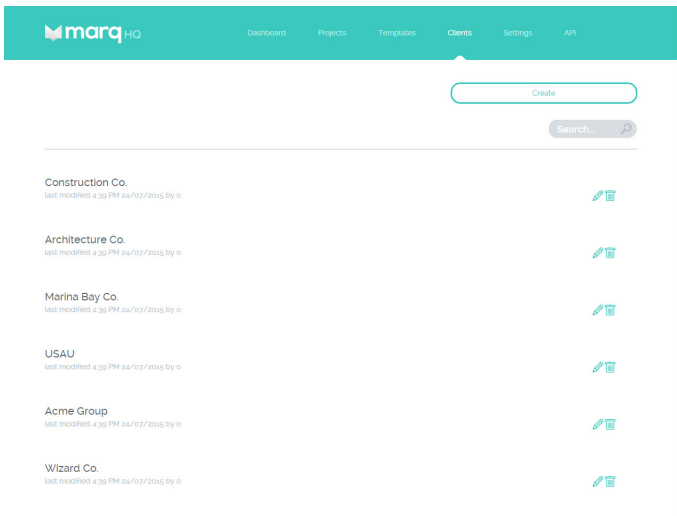


All projects and observations are linked to clients. Clients can have multiple projects and observations attributed to them.

The Clients section allows you to create, search, edit and delete Client details.

# Settings



The settings menu in Marq HQ allows you to manage an number of settings including; Template Categories, Data Usage, Account Settings, Language, Profile Details etc.

# API

Marq - API Help Page

Introduction

This document outlines how to interact with the Marq API

Report

API Controller to Receive Report Generation Requests

| API | Description |
|---|---|
| POST api/report/Generate | Generate a Report Task for the provided inspection |

EnterpriseUrl

API Controller to retrieve enterprise URLs

| API | Description |
|---|---|
| GET api/EnterpriseUrl?enterpriseCode={enterpriseCode} | Gets the enterprise URL |

Inspections

The Inspections Api Controller

| API | Description |
|---|---|
| GET api/Inspections | Returns all inspections |
| GET api/Inspection?projectId={projectId} | Returns all inspections for a given project |
| GET api/Inspections/{id} | Returns a inspection object |
| GET api/Inspections/{id}?projectId={projectId} | Returns a inspection object for a given project |

Clients

API Controller to manage Clients

| API | Description |
|---|---|
| GET api/Clients | Returns all clients |

Marq also utilises a powerful API (application programming interface) for seamless integration with other software programmes. Under certain licenses, Marq's API can be accessed through the Marq HQ.

If your current license does not allow access to the Marq API please upgrade your account or contact us.

# 5. Getting Started
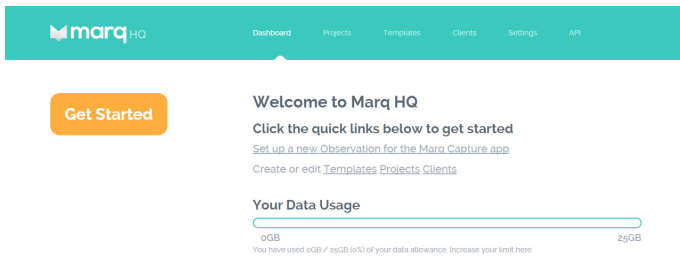


On the Marq HQ dashboard you will see the Get Started button. This button launches a set of steps to help you create an observation for use in the Marq Capture app.

The Get Started steps will prompt you to select a template, client and project. During each step you will be able to select an element from an existing list or create a new element.
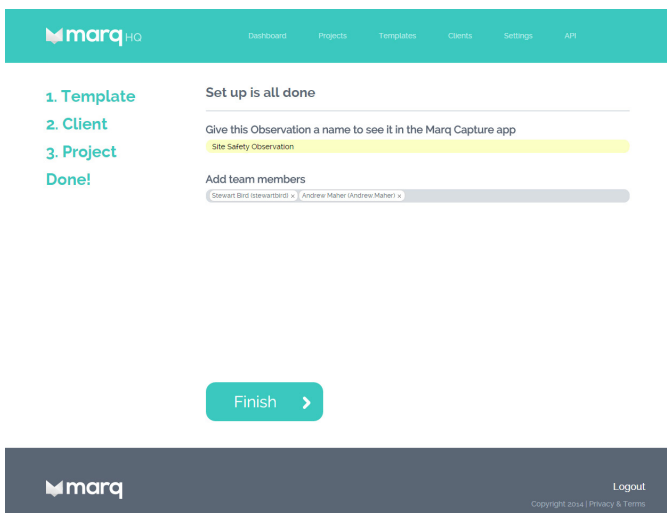


Once you have selected a template, client and project you just need to give your observation a name and select the team members who you would like to have access to the observation.

Once you select finished you are ready to go. Your observation will be available for download on the Marq Capture iPad app.
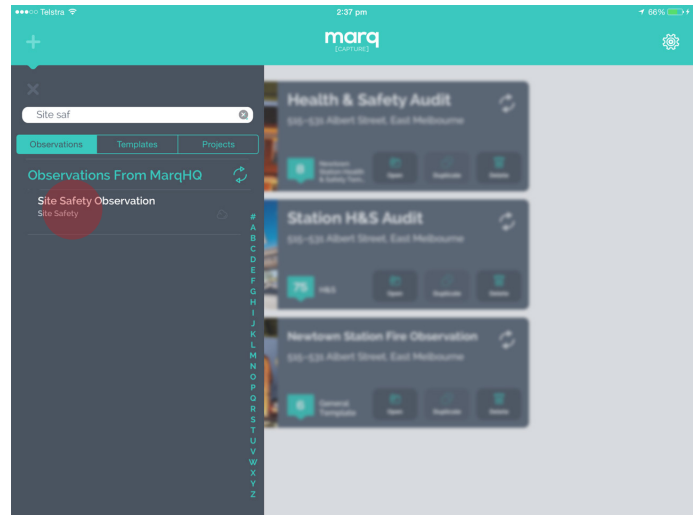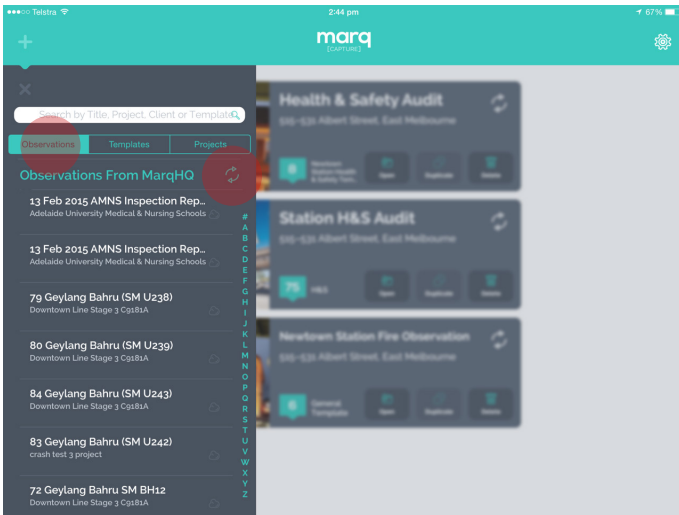
To download the Observation you have just created, open the Marq Capture app on your iPad and when in the home screen select the Marq HQ menu at the top left of the screen.

First hit the sync icon to ensure the list is up to date and ensure that you are in the Observations tab, once you have done this use the search box to search the title of your Observation. To download, simply tab the Observation title.
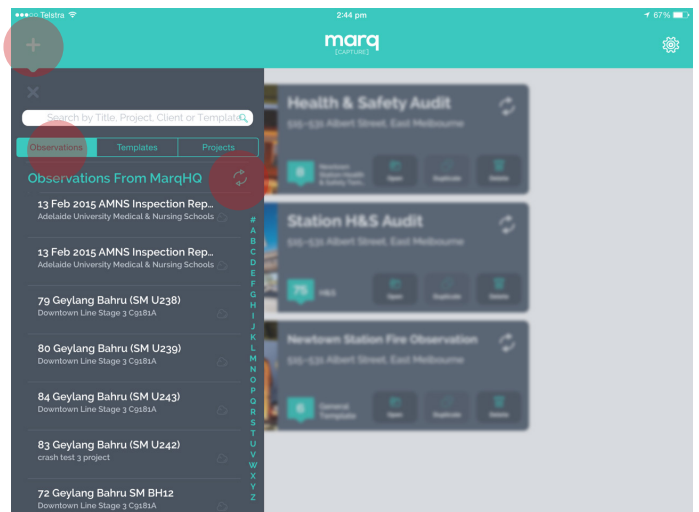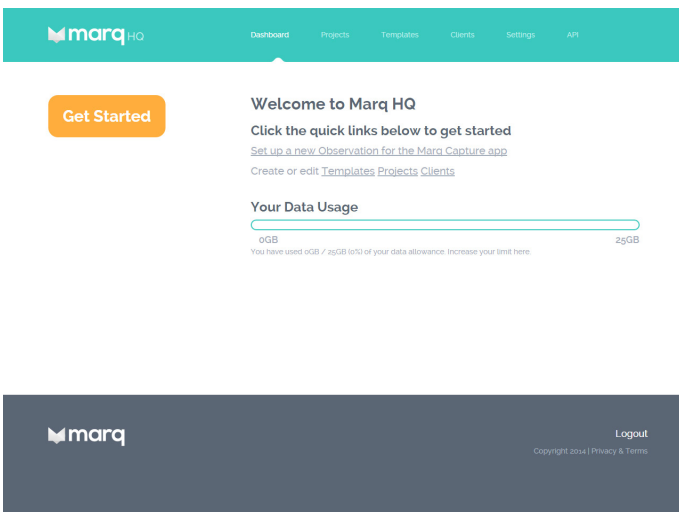
Now you're ready to start your Observation.

# 6. Capturing Data

To start capture data in the field using the Marq Capture app, you need to first set up an Observation.
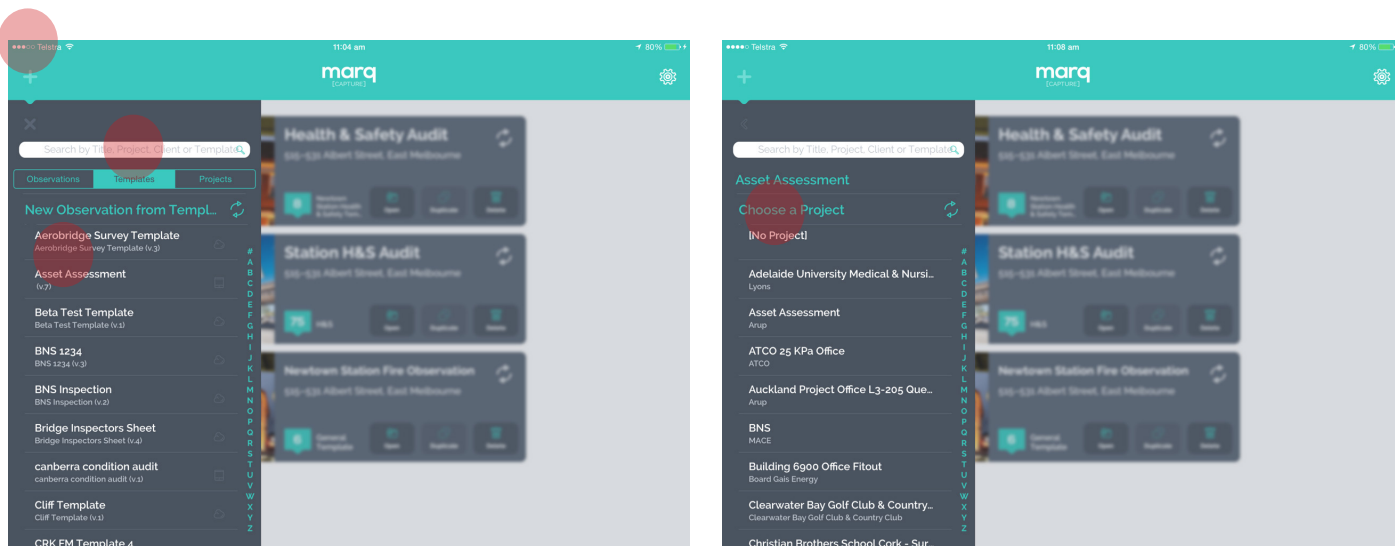
There are a number of ways you can set up an Observation;

1. Get Started Button

As we discussed in section 6, you can create an Observation on Marq HQ using the Get Started button and download it onto the app via the Marq HQ menu.

## 2. Start with a Template



You can also start an Observation directly on the Marq Capture app by selecting a template. To do this, select the Marq HQ menu and then select the templates tab. Once you have found a template you would like to use, tap the title. You will then be prompted to select a project this observation will belong to, if you have not already set up a project in Marq HQ select [No Project]. You will be able to assign the Observation to a project in Marq HQ at a later stage.

## 3. Start with a Project
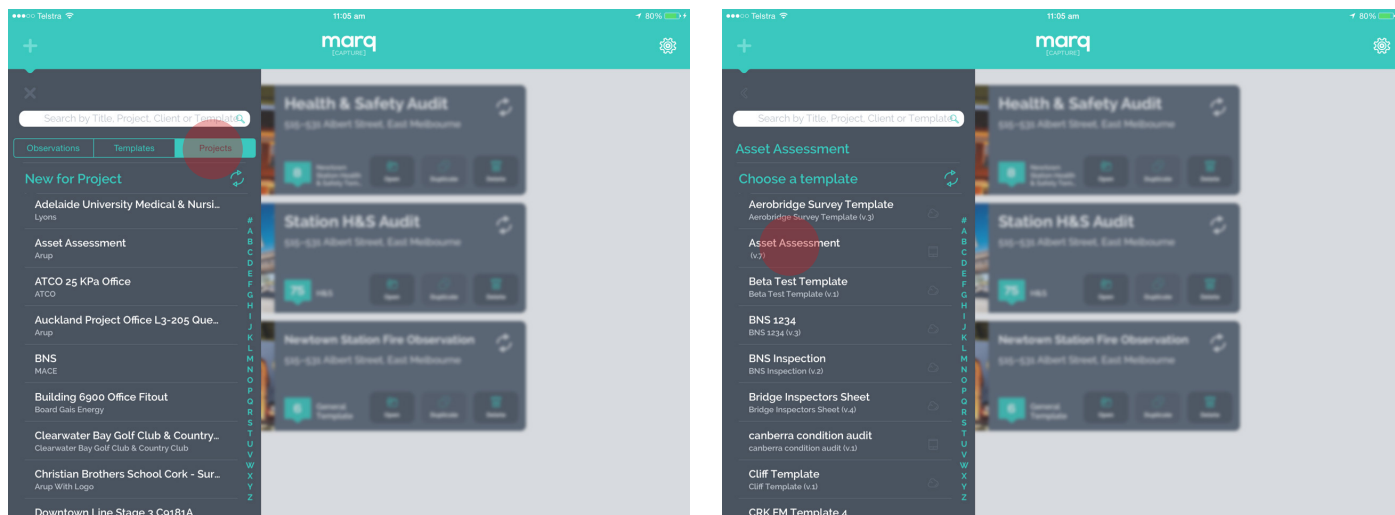


This approach is the same as starting with a template, only in the reverse order. Rather than selecting a template then a project, in this appraoch you will first select a project then be prompted to select a template.

# Details tab
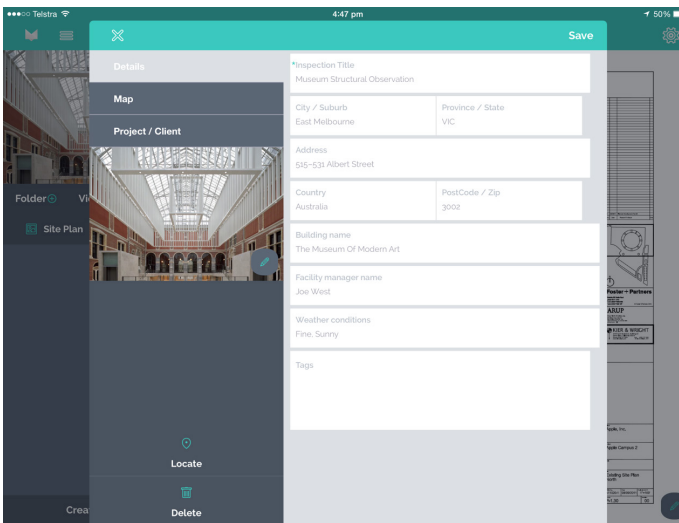


Once you have started your Observation, the first screen you will see is the Observation Details screen. In this screen you will be prompted to enter the primary observation details as defined by your template.

# Project/Client tab
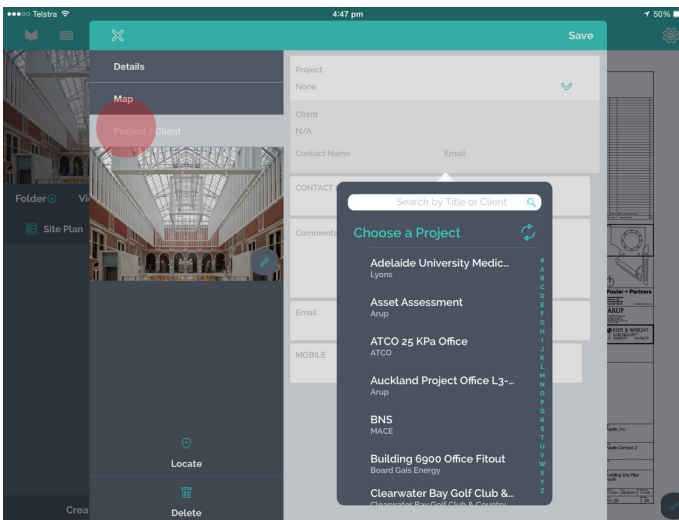


The Project / Client tab holds the information about the project and client the observation belongs to. By selecting a project when starting from a template the client information will be automatically filled in.

The project the observation is associated with can be changed at any time by using the drop-down menu and selecting another project.

# Map tab
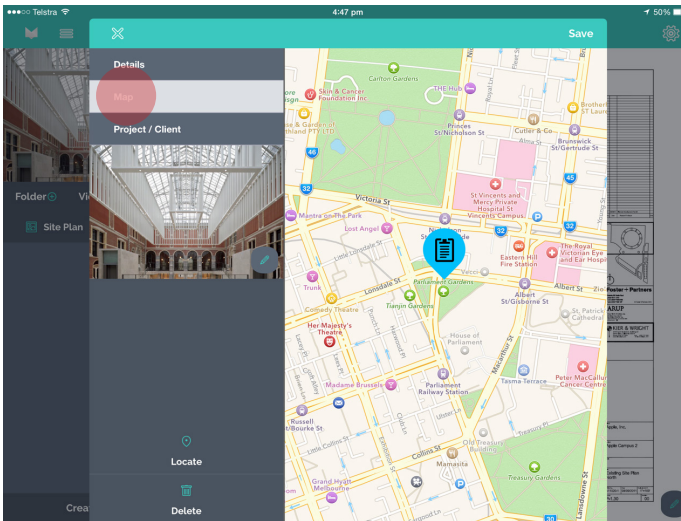


If you chose to add address fields to your template in the template manager then selecting the Locate icon at the bottom of the side panel will update the address fields and also locate your current position in the Map tab.

# Cover image
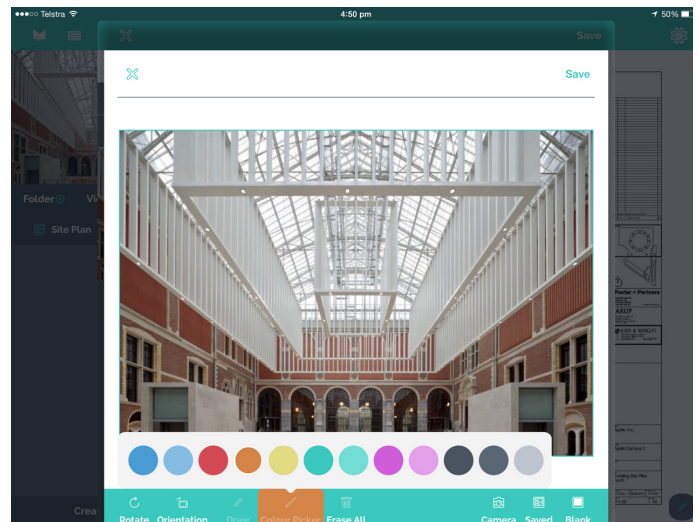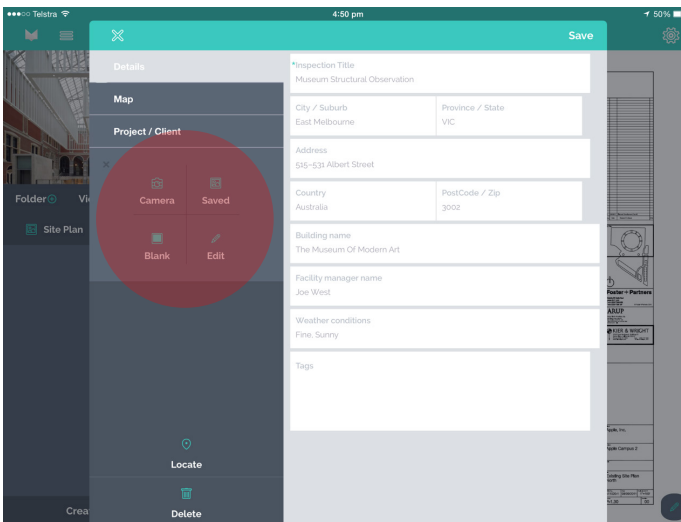


You also have the option of adding a cover image for the observation. This image will become the cover image visible on your iPad dashboard, your Marq HQ projects page and in the reports generated for the observation.

To add a cover image select the edit icon. You will be given the option of taking a picture with the iPad camera, selecting an image from your photo galleries or selecting a blank white background.

Once an image is selected the edit screen will allow you to mark-up the image using the draw tool and a selection of 12 different colours.

# Saving the primary observation information
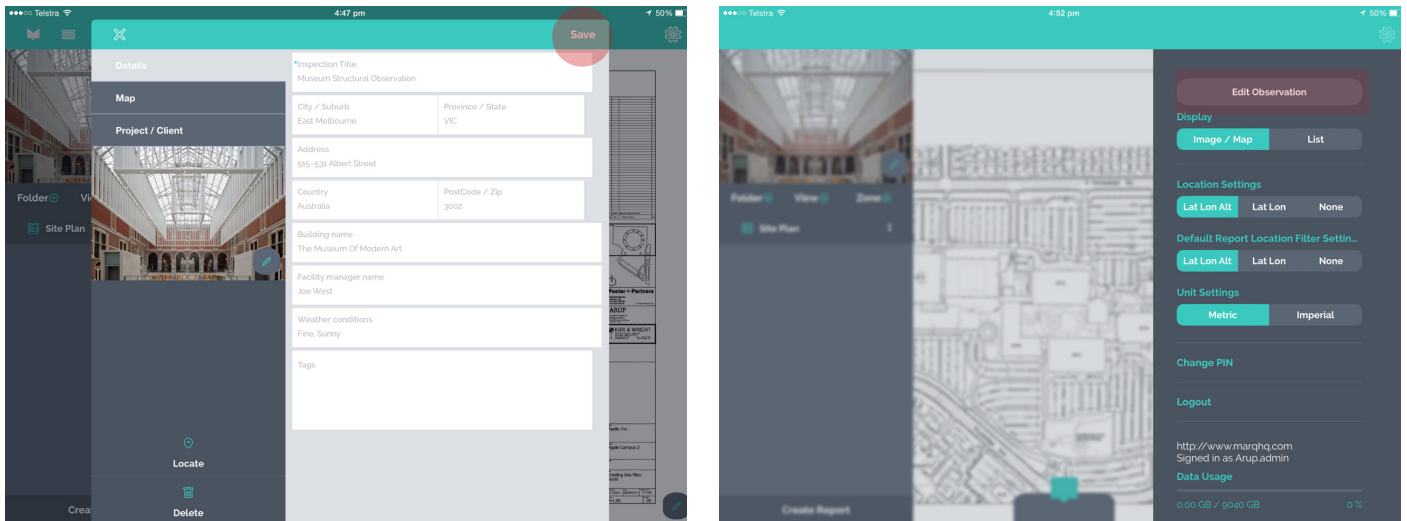


Once you are satisfied that you have completed all necessary information click save. The information can be edited at any time throughout your observation by selecting the iPad settings menu and clicking the Edit Observation button.

# Start with a View
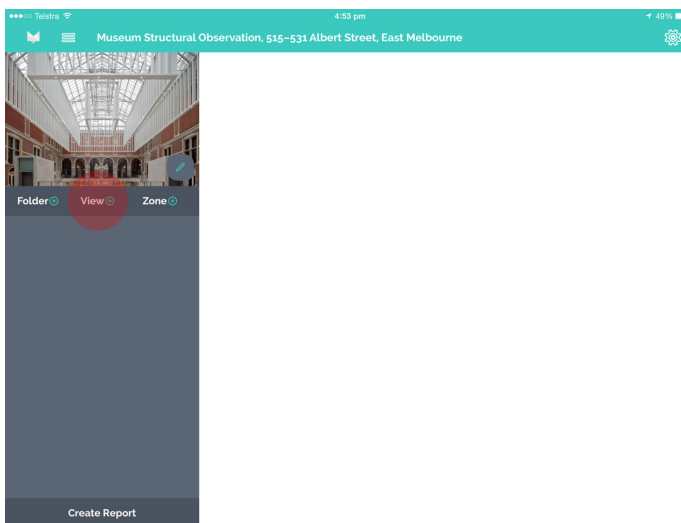


To start capturing data the best place to start is adding a View. A View is a background image, PDF or map on which you drop Marqs that indicate the location of an issue.

To add a View simply select the Add View icon on the left hand menu. You will then be prompted to give the View a title and then choose where you will select your View from. You create a new view by taking a new photo with the iPad camera or by selecting from an image gallery, map or a blank white background. Besides the selection of a Map View, all other options can be edited using the drawing and cropping tools before saving.

Multiple Views can be added to an observation and each subsequent View will appear as a new tab in the left hand menu. The order of views can be rearranged by simply swiping left to right on the View title, selecting the drag icon, then holding and dragging the tab into a new position.

# PDF & existing image views
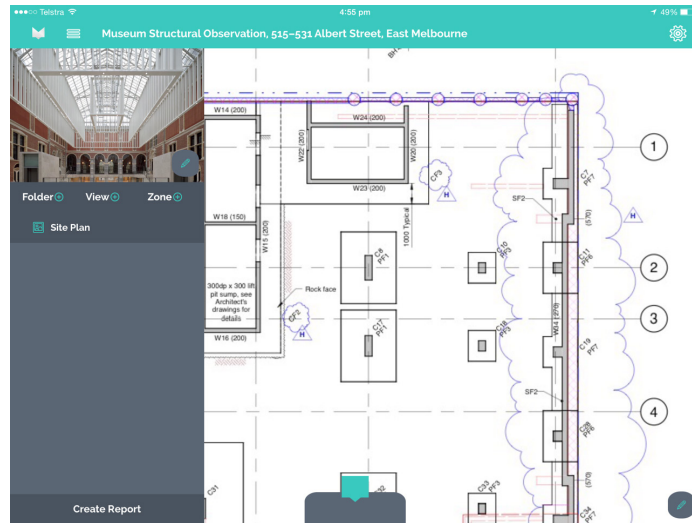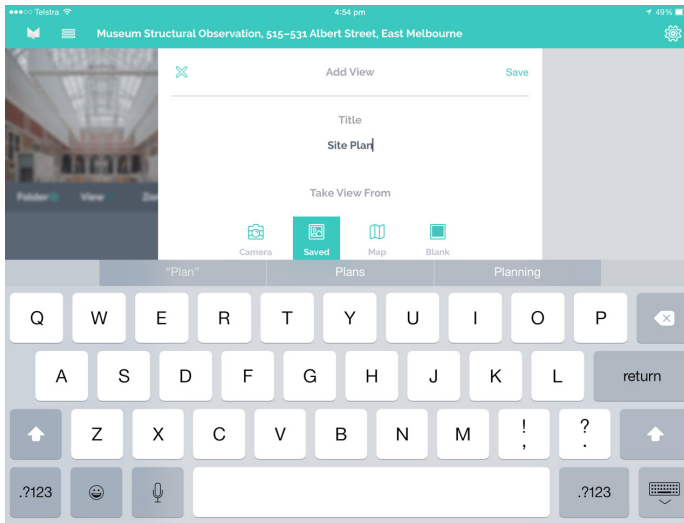


PDF and Existing Image Views operate in the same way. Both types of views need to be loaded onto the iPad and saved in one of the image galleries. You can upload files into the image galleries using numerous applications such as email, Dropbox, ProjectWise, Google Drive, Evernote etc.

Once the PDF or Image is loaded on to the third party app, simply select the export icon, open in and then select the Marq icon. This will import the file into the iPad Camera Roll.

When adding a View in the Marq app select the Saved option and your uploaded PDF or Image will be available in your Camera Roll for use.
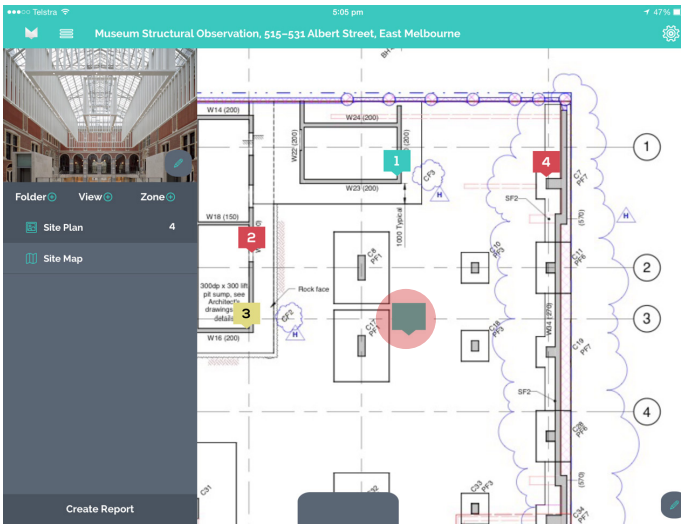
# Map views
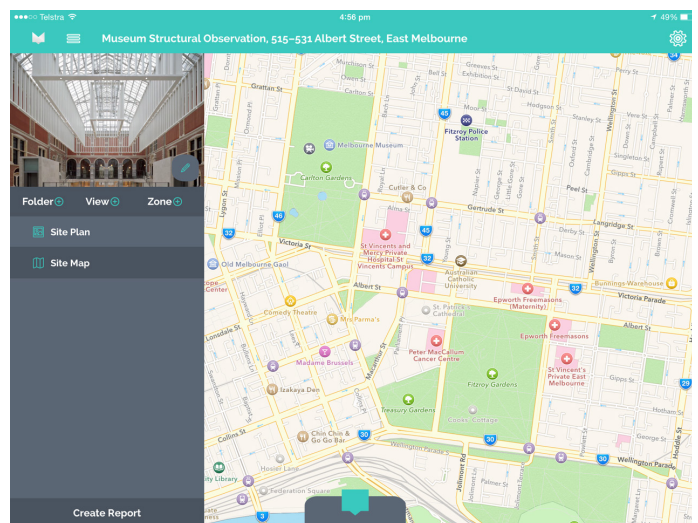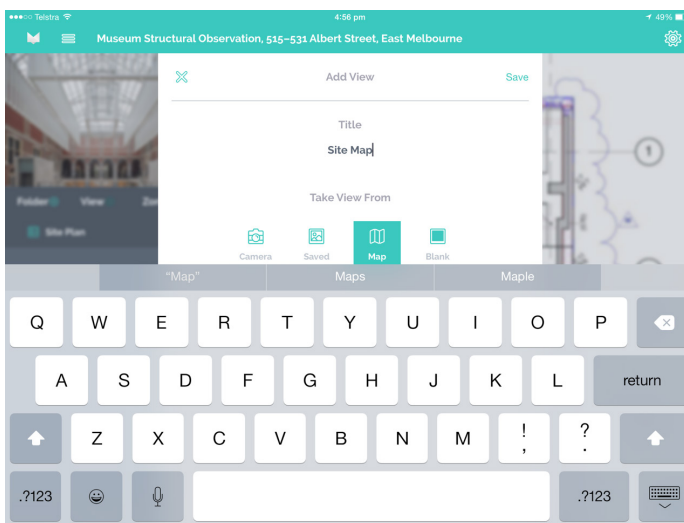


When adding a View, the Map option allows you to use an interactive Apple Map on which to locate issues and place Marqs.

You can also choose to display the Maps in Street, Satellite or Hybrid views by using the options in the Settings Menu.

# Adding Marqs



Marqs provide a way of capturing data and images relating to a particular issue. Marq icons are placed on Views that represent the location of that particular issue requiring attention, helping project stakeholders to understand issues in spatial context.

To start using Marqs, select the View on which you would like to locate an issue then simply hold, drag and drop the Marq icon onto the location of that issue.
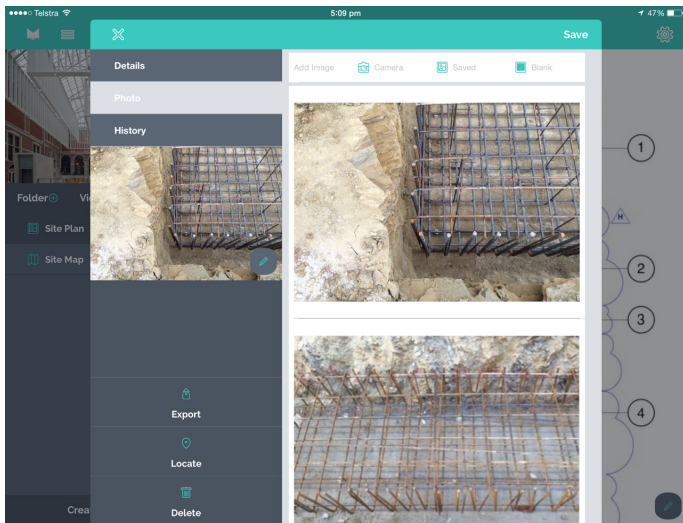
Once you have placed a Marq on the View you will be prompted to enter data and images based on the issue you are observing.

# Marq details tab
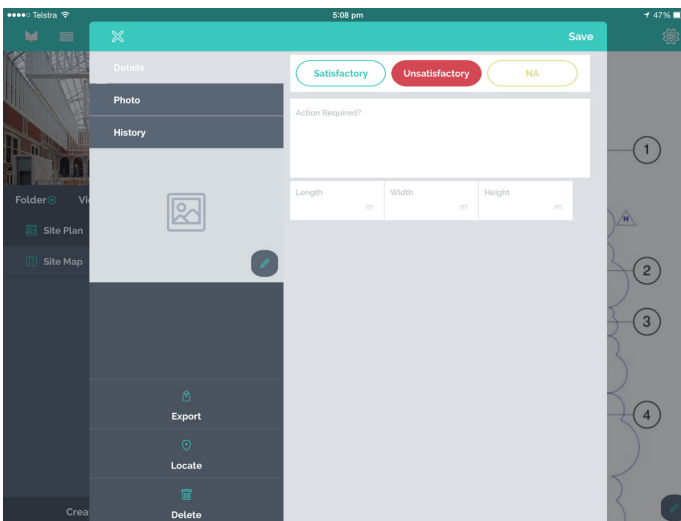


The Details Tab will contain all the questions that you designed in the template manager. This is where most of your data will be captured.

# Marq photos tab



The Photos Tab is where you can capture images of the issue. You can add new photos using the iPad camera, by selecting pre-existing images from your iPad's photo galleries or selecting to use a blank white background.

You can add as many images to each Marq as you like however it is worth noting that the number of images and their quality will directly affect the file size of your observation and reports. If you are using a Free, Basic or Advanced version of the app this can have an effect on your data storage allowance.

# Using zones
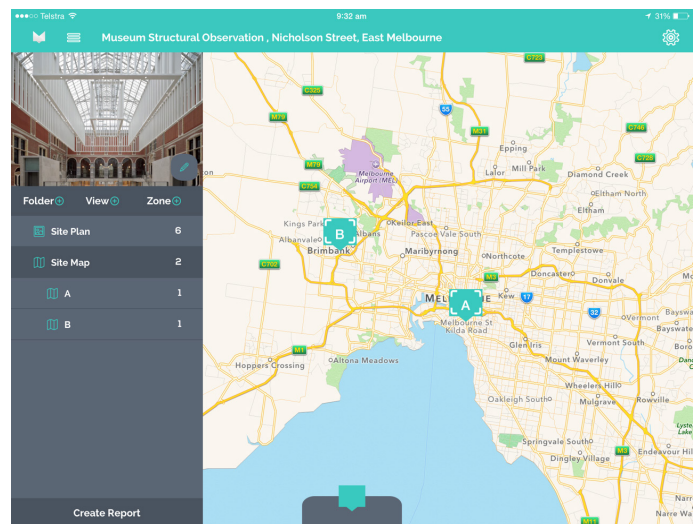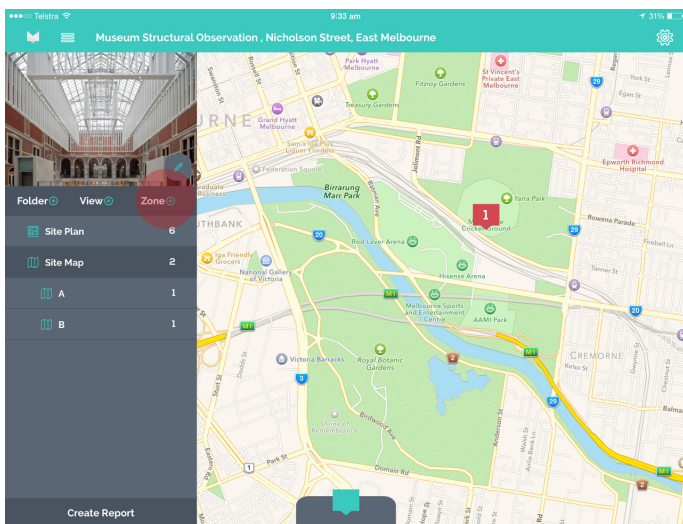


When using large floor plans or large areas on Maps as your View it can be difficult to see the level of detail you need. The Zoning feature offers a way to group together Marqs that are in a close proximity to one another.

For example, if conducting an Observation across an entire city the Zoning feature would allow you to divide your Observation up for easier management with each Zone representing a single district and each zone containing individual Marqs.

To create a Zone simply zoom into an area of your Map or Image View and select the Add Zone icon in the left hand menu. This will turn the area into a Zone in which Marqs can be placed.

Remember!

It is important to consider how Zones might best be used on your Observation before you start. This is because Zones need to be created before Marqs are placed. Existing Marqs cannot be grouped into Zones after they have already been placed on the View.
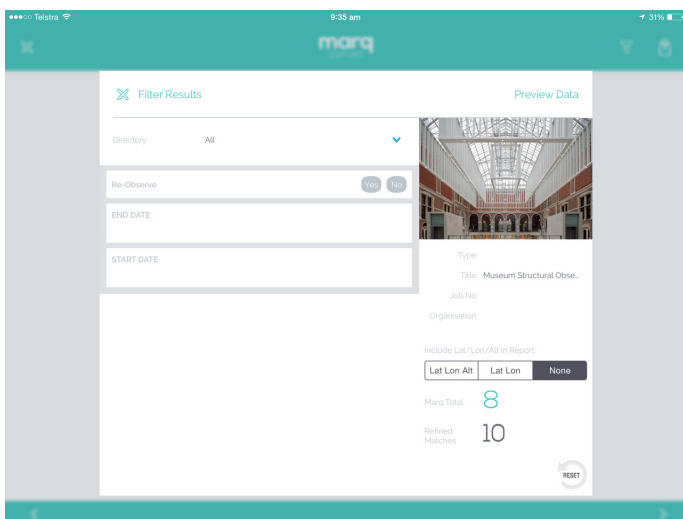
# 7. Creating reports

## Generating reports from Marq Capture
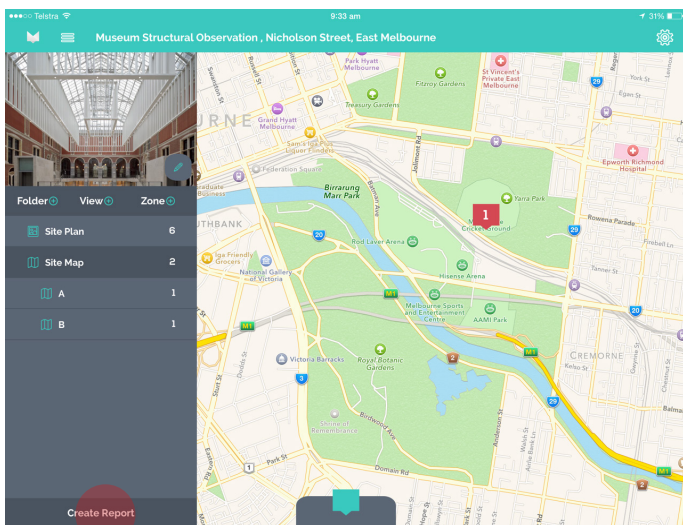


You are able to create a report at any stage throughout your Observation on the Marq Capture app. To do this simply select Create Report at the bottom of the draw.

## The report filter

After selecting Create Report you will be taken to the Report Filter. This is where you can refine the data that will appear in your report based on the filters you created in Marq HQ's Template Manager (See section 8.3).

You can also select what location data you would like to display in the final report. You can choose to display;

- Latitude, Lonitude & Altitude
- Latitude & Longitude
- None

Selecting the Reset icon will clear all your selected filters and allow you to start again.

## Preview report data
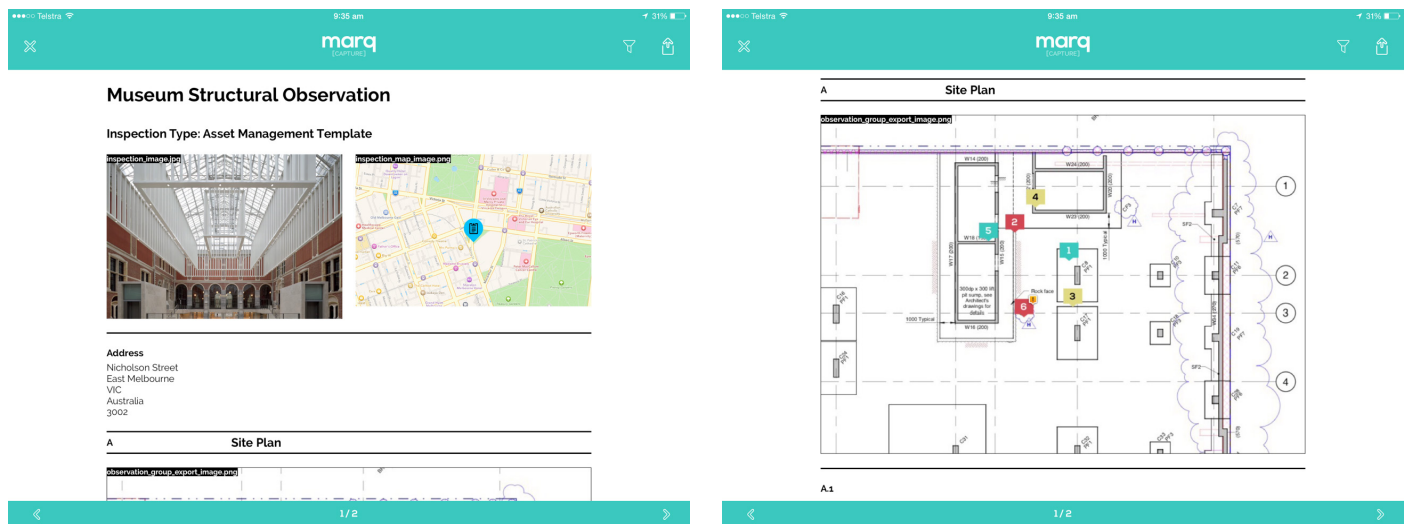


Once you have selected your filters select Preview Data. This is an unformatted preview of the data that will be displayed in your final report. The preview is intended to give you a rough idea of what your report will look like before you export a final copy.

You can continue refining the report data by returning to the report filter.

# Exporting & syncing reports
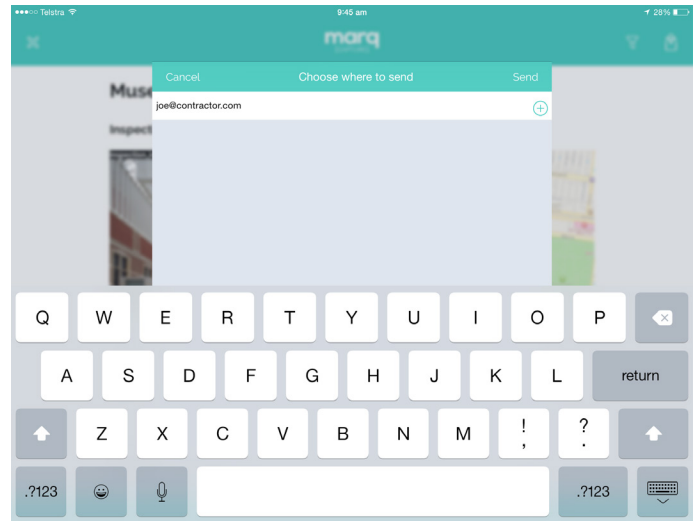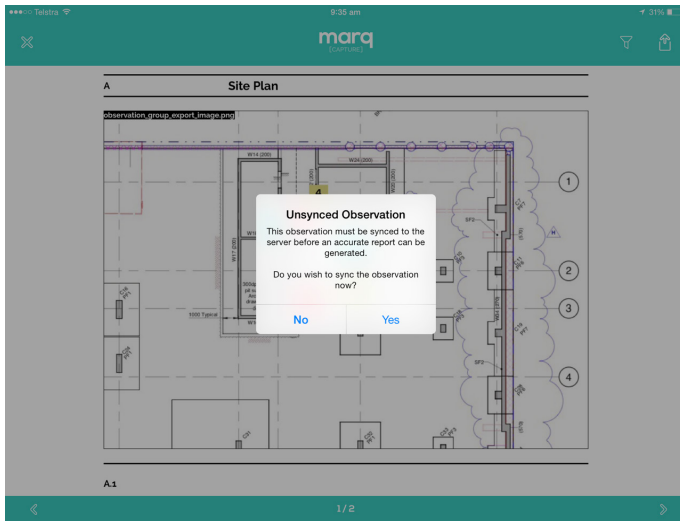


When you are happy with the data in the report, select the Export icon in the Data Preview screen.

You will be prompted to sync your observation with Marq HQ in order to generate the report. It is recommended that you do this whilst on a wifi connection if the Observation is of a large size. Syncing whilst on a 3G or 4G connection could consume a large amount of your plan's data allowance.

Once the Observation has been successfully synced you have the option of emailing the report to project stakeholders. The recipients are not required to have a Marq account in order to view the report.

A link to the report viewer will be emailed to the stakeholder. Clicking the link will open up their browser where they will be required to enter in their email address. The email address entered must match the email address the report link was sent to. This is a security measure to ensure that report is only viewed by the intended person.

If the email entered matches the delivery email the stakeholder will be given access to the report viewer. From the report viewer the stakeholder can view or save the report in a number of different formats.

# Generating reports in Marq HQ
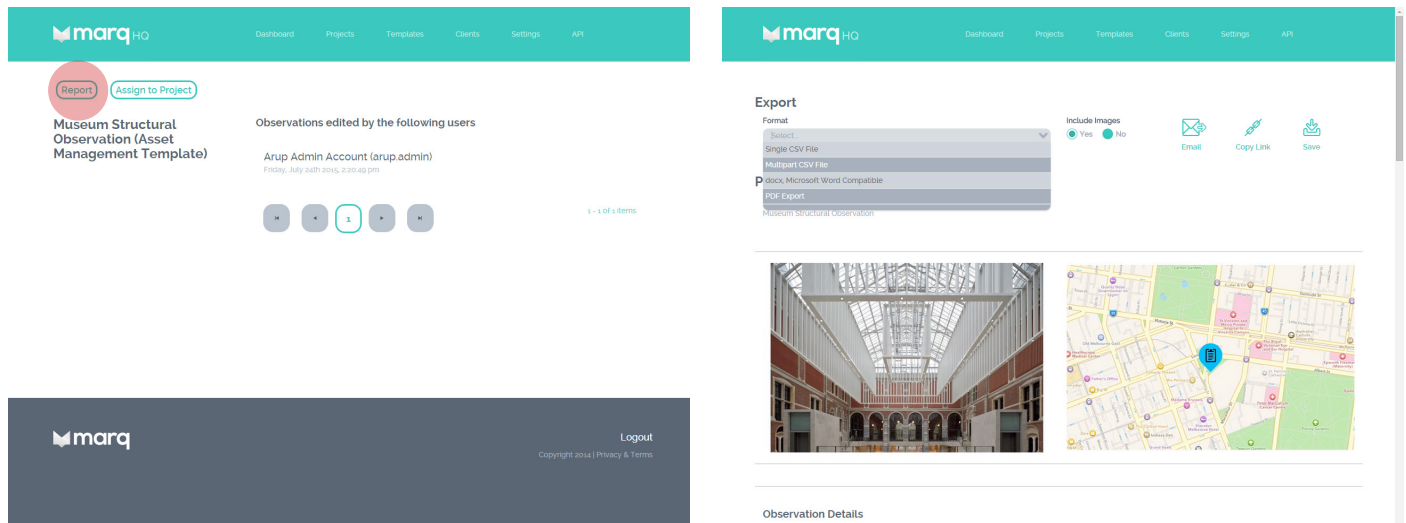


Once an observation has been synced to Marq HQ the observation report will be available for viewing online.

To access the report head to the project section, search for your observation and select the thumbnail or title. This will take you to the observation details page.

To view the report simply click the Report button at the top of the page. This will take you to the Report Filter and then to the Report Viewer where you can save, email and generate a public link to your report. You have the ability to save the report in a range of different formats, which include csv, pdf and docx (Word Document).

marq