



marq

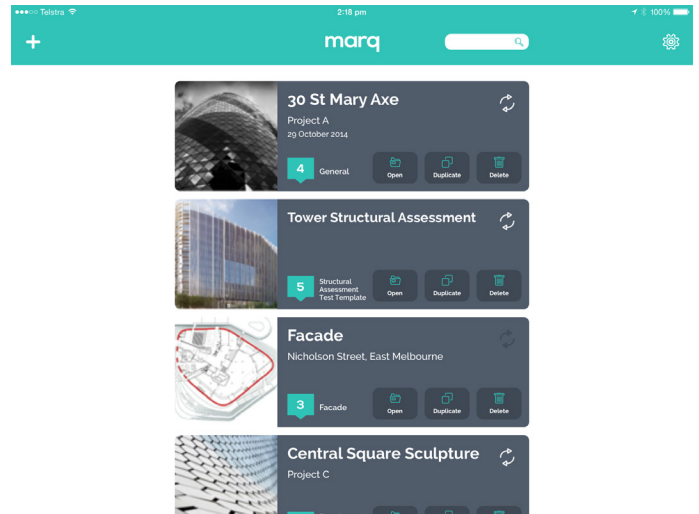
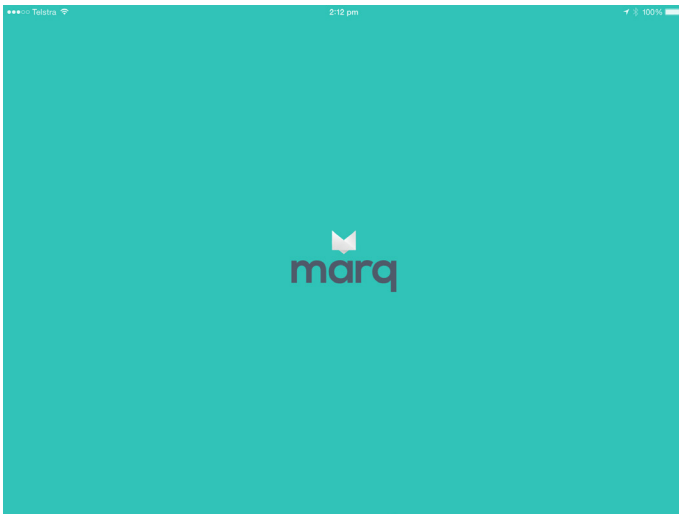
User Guide

Table of contents

Contents	Page
1. What is Marq	3
2. Support	4
3. Marq key terminology	4
4. An overview of Marq Capture	6
Login Screen	6
The App Dashboard	6
The Marq HQ Menu	7
The Settings Menu	7
5. An Overview of Marq HQ	8
The Dashboard	8
Projects	9
Templates	9
Clients	10
Settings	10
API	11
6. Getting Started	12
7. Capturing Data	14
Details tab	15
Project/Client tab	16
Map tab	16
Cover image	17
Saving primary information	17
Start with a View	18
PDF & existing image views	18
Map Views	19
Editing Views	19
Deleting Views	20
Copying Views	20
Adding folders	21
Adding Marqs	21
Marq details tab	22
Marq photos tab	22
Marq history tab	23
Other Marq options	23
Re-observing Marqs	24
Editing Marqs on a View	25

Using Zones	26
Reporting Order	25
Saving your template	26
8. Creating Reports	27
Generating reports from Marq Capture	27
The report filter	27
Preview report data	28
Exporting & syncing reports	28
Sent report history	29
Generating reports in Marq HQ	30
9. Marq HQ	31
9.1 Managing clients	31
Creating a client	31
Client details page	32
9.2 Managing projects	32
The Project Dashboard	33
Creating a project	33
Managing a project	34
Managing your project team	34
Archiving a project	35
9.3 The Template Manager	35
Managing your templates	35
9.4 Creating a new template	36
Template editor	36
The Canvas	38
Elements	38
Compiling your template	40
Group information	41
Element information	42
Saving your template	43
9.5 Advanced Template Features	44
List Display	44
Marq List	45
Report Filters	47
Calculations	47
Report Ordering	48

1. What is Marq



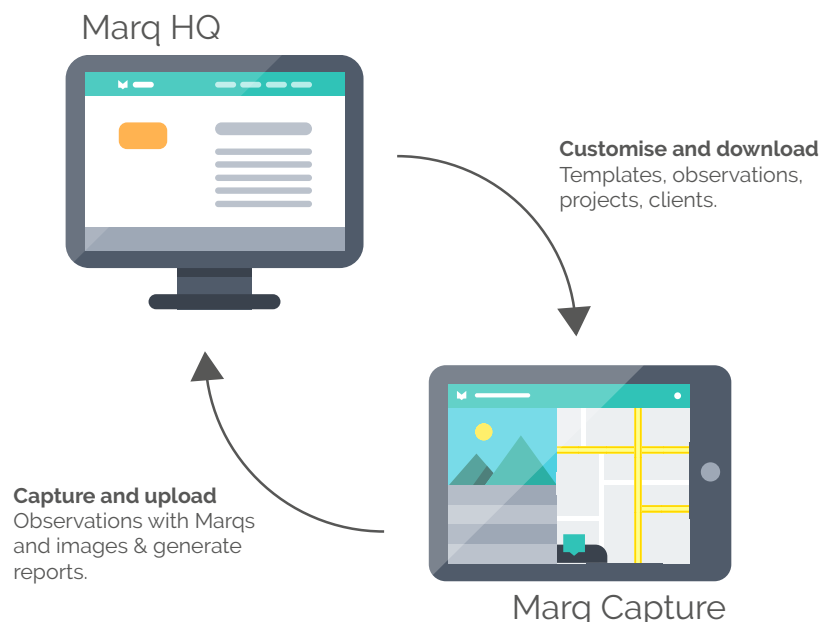
Marq is a sophisticated platform that allows you to quickly and accurately capture data in the field, manage it easily online and communicate it clearly.

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

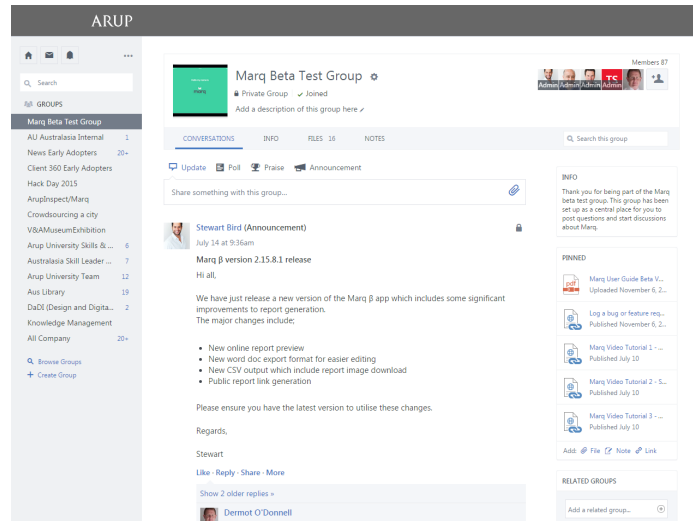
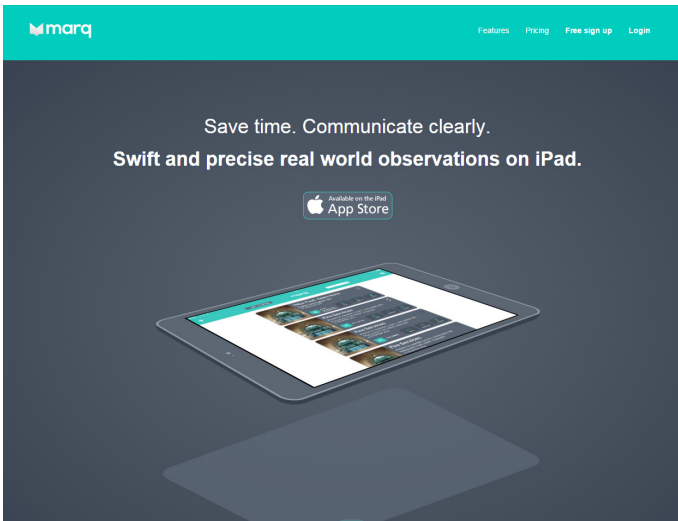
The Marq HQ web interface gives you the ability to manage all your on-site activities in one place. Its sophisticated template builder allows you to customise how you collect data on site. Marq HQ also gives you the ability to effectively manage your project's workflow by coordinating the activities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



2. Support



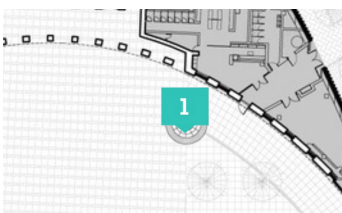
There are a number of support channels available to Marq users.

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 where questions and discussions are visible to all. You can access the group here - [Yammer Marq Beta Test Group](#).

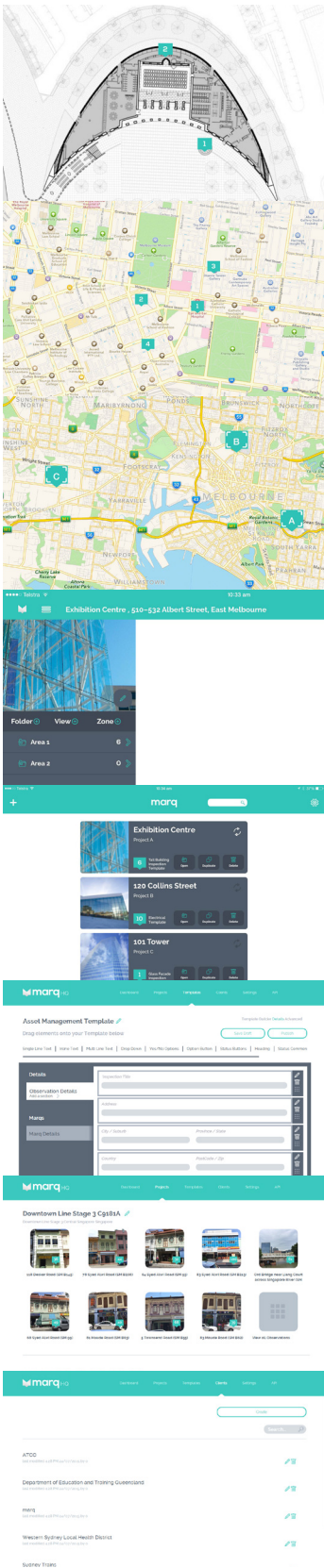
For direct assistance please contact the Marq team at Observeapp.support@arup.com.

3. Marq key terminology

The terminology used by Marq differs from the Arup Inspect terminology that you might be used to. This section will give you a brief overview of what the major components of Marq are called and what they do.



Marq - a Marq is placed on a View or a Map to indicate the location of an issue. Marqs can also be viewed in Lists.



View - a View is a background image or pdf that relates to the area where an Observation is taking place.

Map - a Map uses an interactive Apple map that indicates the area where an Observation is taking place.

Zone - a Zone is an area on a View or Map that can be created to contain Marqs

Folder - a Folder can be used to group multiple Views and Maps

Observation - an Observation is an activity that involves the collection of data on site for a particular purpose.

Template - a Template is a customisable framework that outlines how data is captured during an Observation.

Project - a Project is a body of work that involves one or more Observations and has an associated project team.

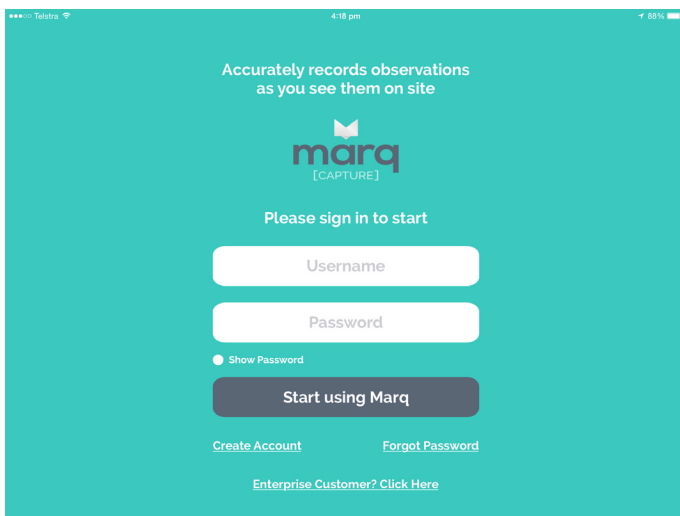
Client - a Client is a person or organisation that has commissioned one or more Projects.

4. 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

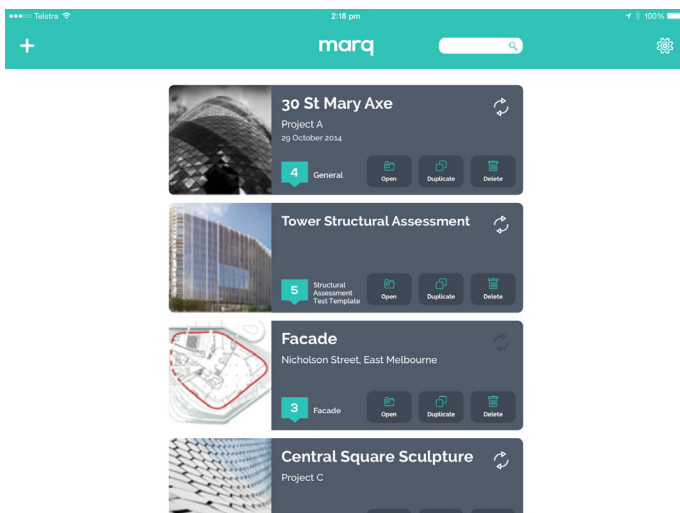


The first screen you will see when you open the app is the login screen. This is where you use your Marq credentials to start using the app.

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.

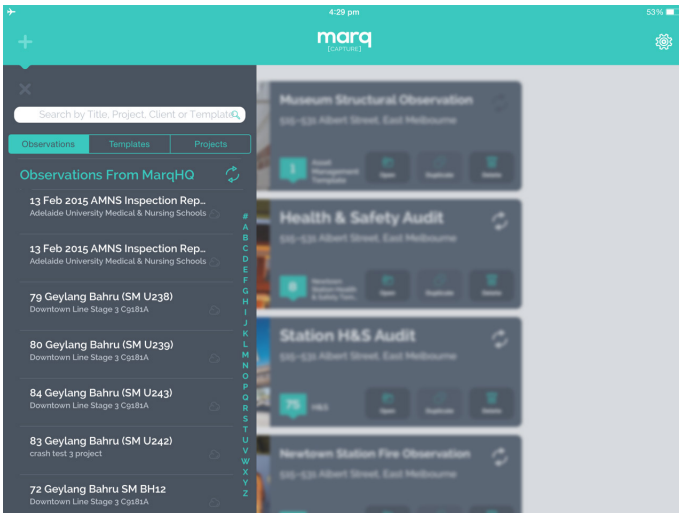
You can log in using your normal Arup details by first selecting the Enterprise link, entering "Arup" as the Domain, then entering your details.

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.

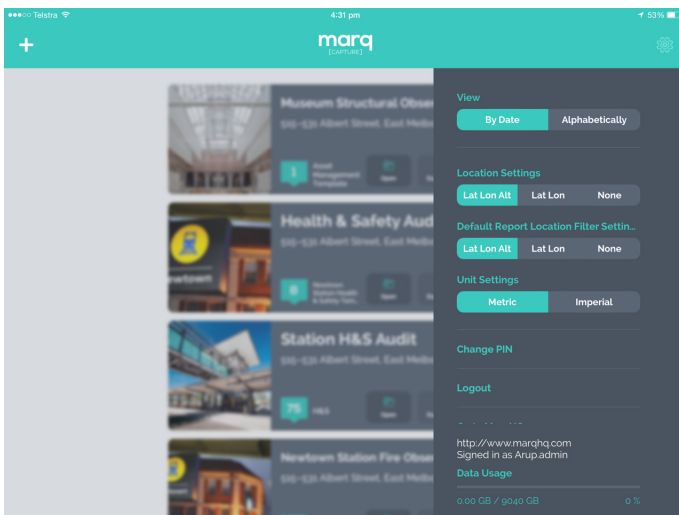
The Marq HQ Menu



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



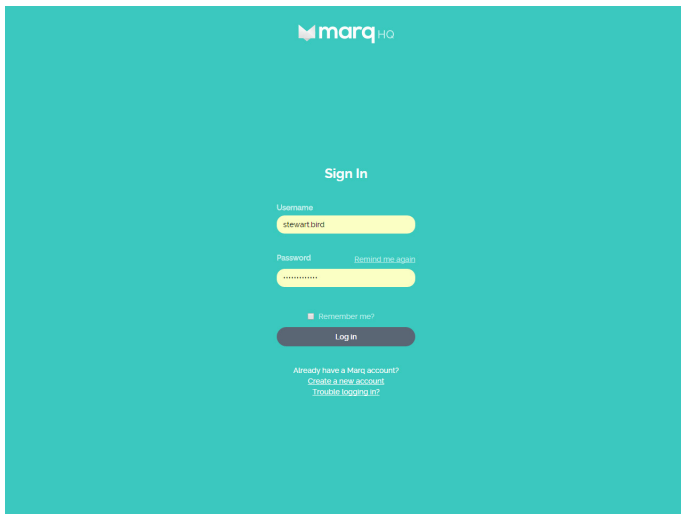
At the top right of the screen you will see a cog icon, this gives you access to the Marq Capture settings menu. This menu allows you to adjust your;

- 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 in a separate browser and find out more information about Marq.

It also provides a Data Usage metre that allows you to monitor your Marq account data usage.

5. An overview of Marq HQ



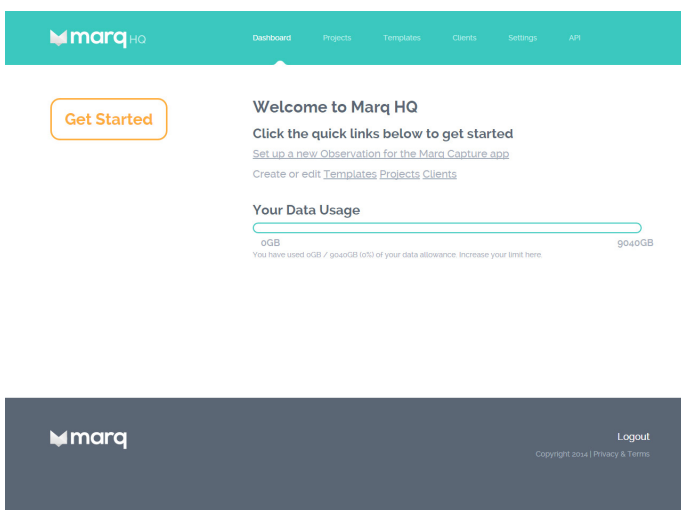
Marq HQ is your Marq control panel. This is the web management system that allows you to create and control everything that you will use the Marq app for.

Marq HQ allows you to management your account, create and manage project teams, create and edit templates and save and manage your observations.

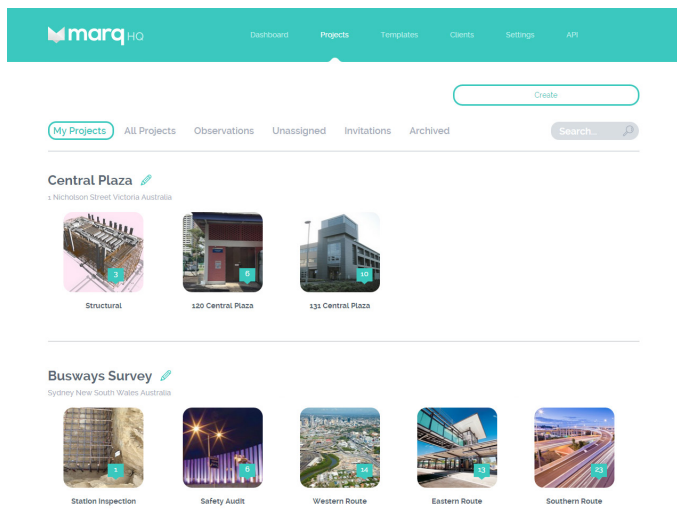
You can access the Marq HQ by heading to MarqHQ.com in your web browser on a desktop or laptop computer

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.



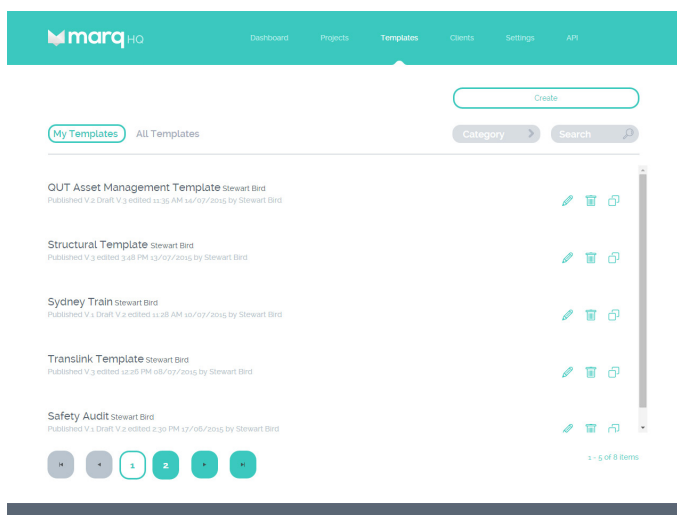
Projects



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

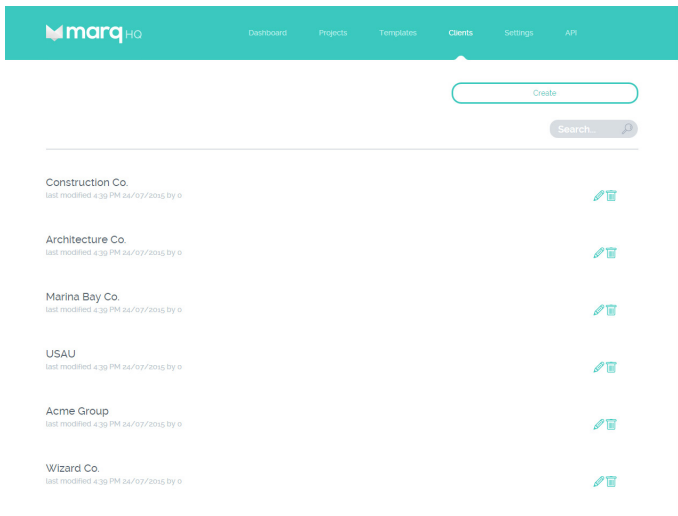
The My Projects section displays all the projects you are currently working on and the observations associated with each. The All Projects section are all the projects being undertaken by your organisation. From the dashboard you can create new projects, edit existing projects, view archived projects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

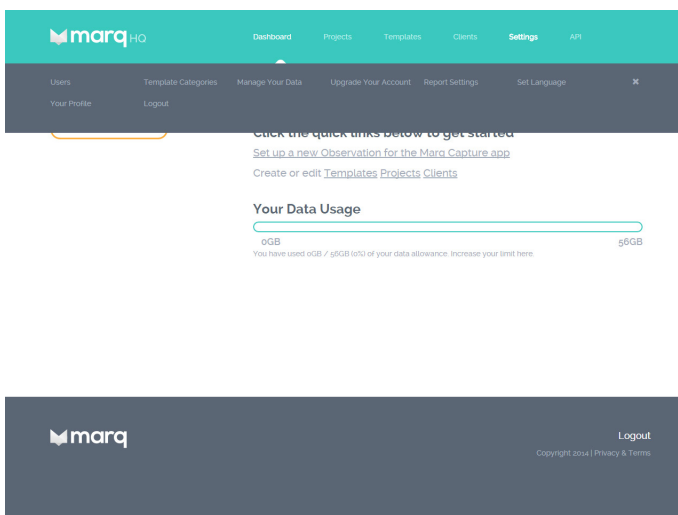
Clients



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/reports/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/Inspections?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

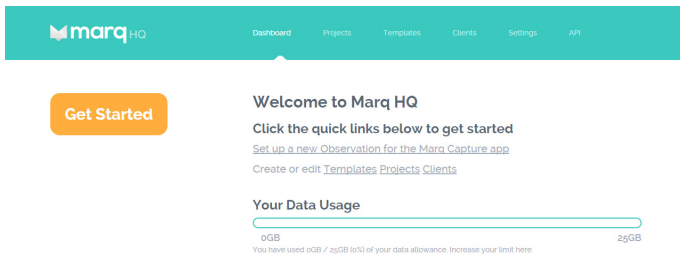
API Controller to manage Clients

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.

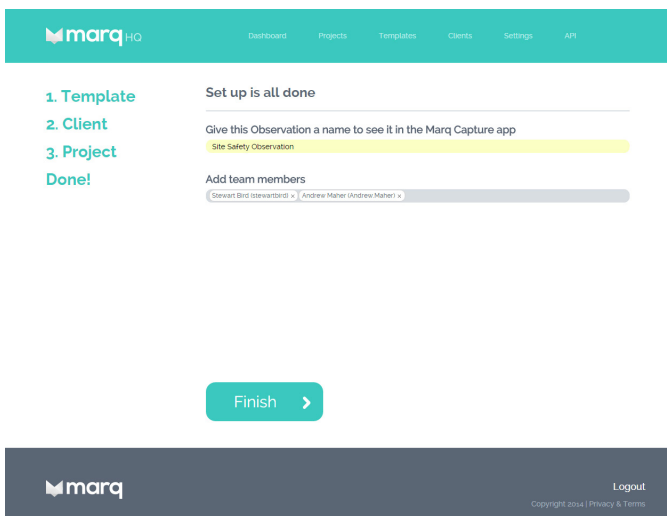
If your current license does not allow access to the Marq API please upgrade your account or contact us.

6. Getting Started



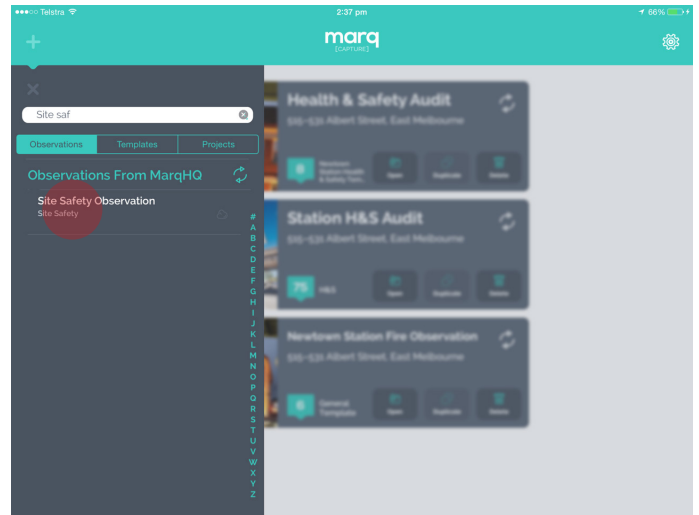
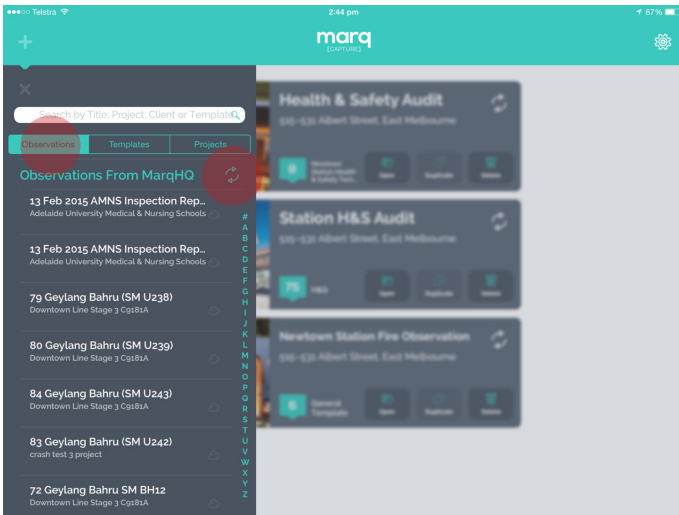
On the Marq HQ dashboard you will see the Get Started button. This button launches a set of steps to help you create an observation for use in the Marq Capture app.

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.

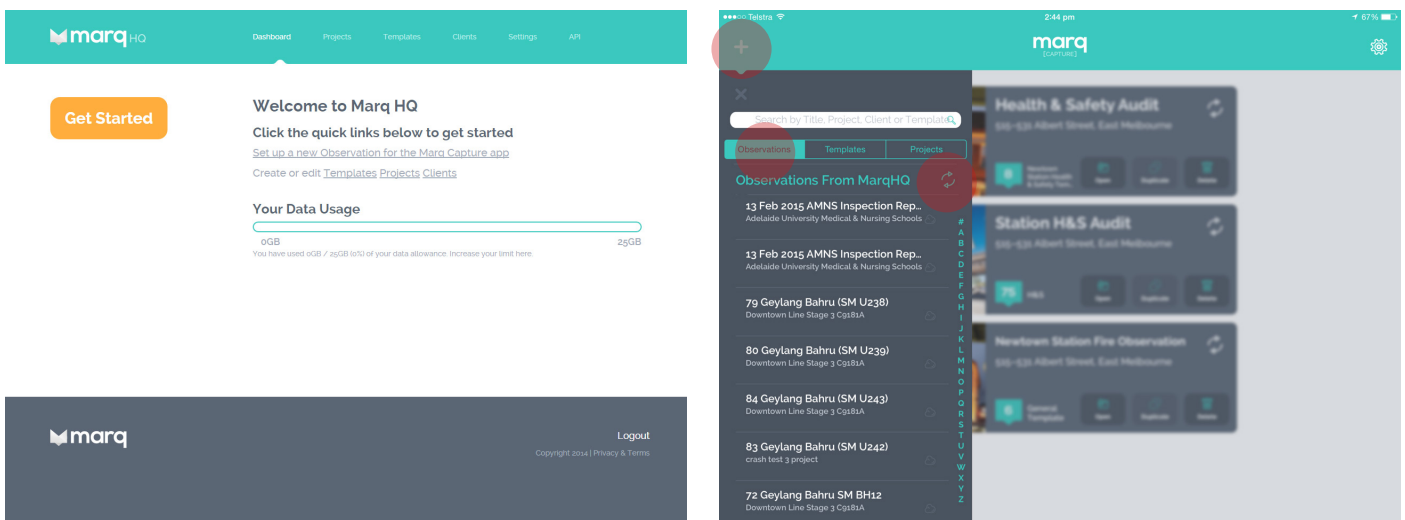
Now you're ready to start your Observation.

7. Capturing Data

To start capture data in the field using the Marq Capture app, you need to first set up an Observation.

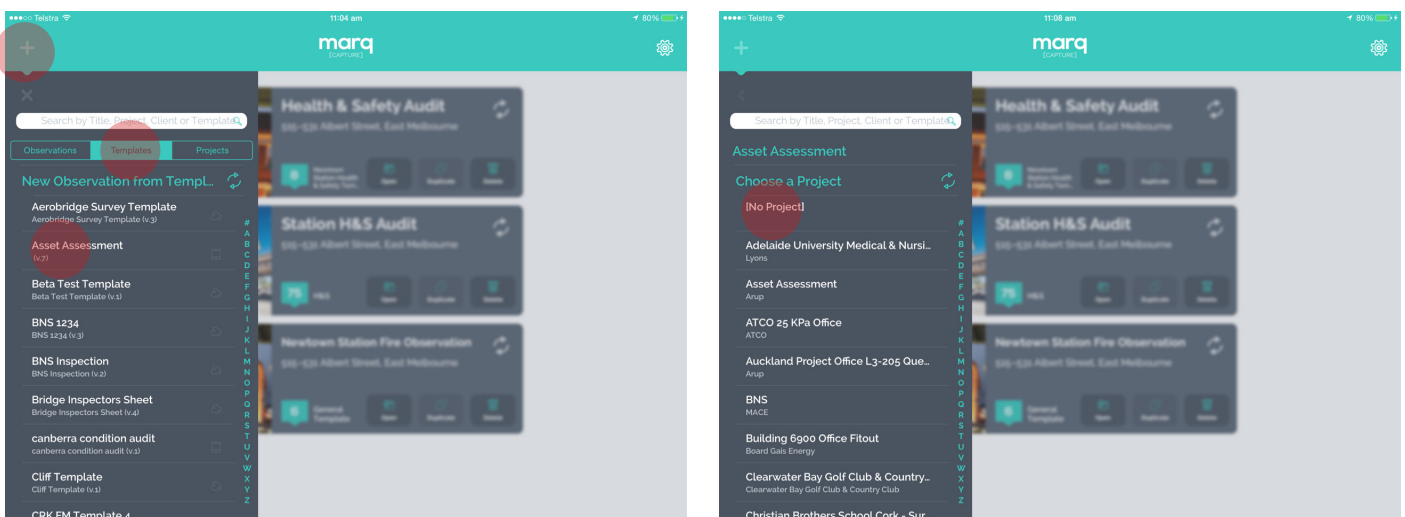
There are a number of ways you can set up an Observation;

1. Get Started Button



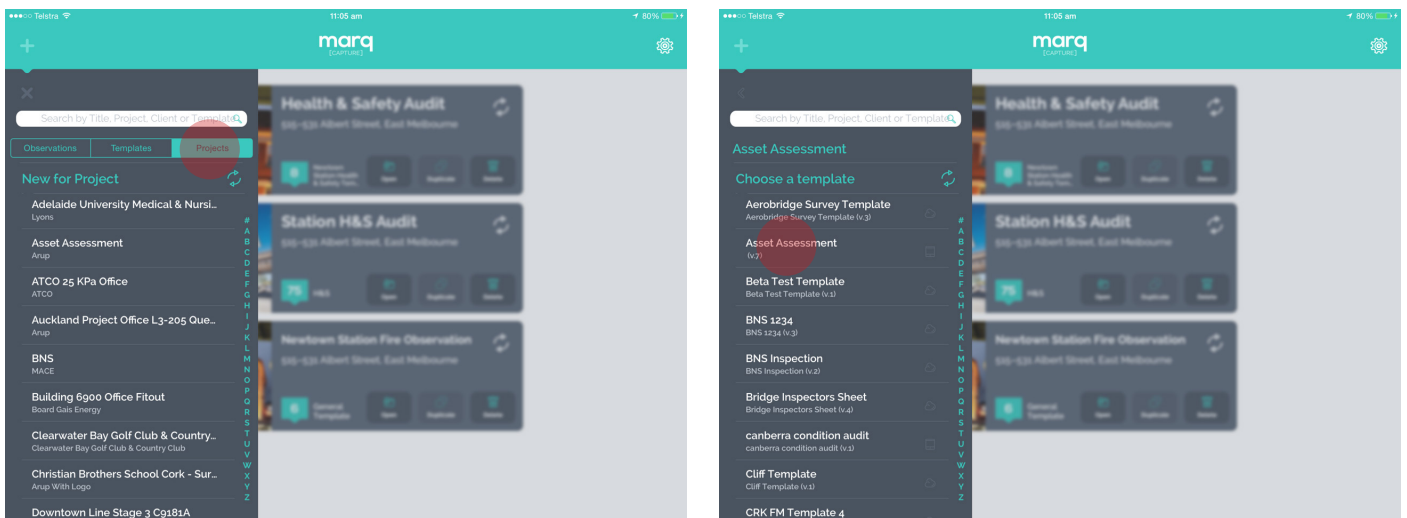
As we discussed in section 6, you can create an Observation on Marq HQ using the Get Started button and download it onto the app via the Marq HQ menu.

2. Start with a Template



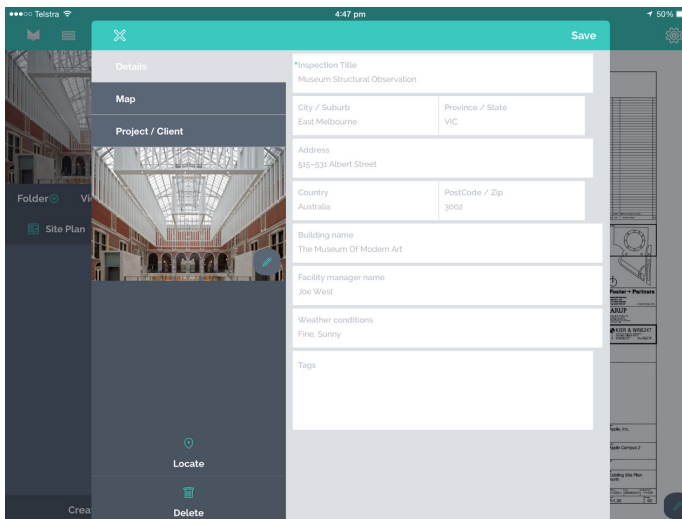
You can also start an Observation directly on the Marq Capture app by selecting a template. To do this, select the Marq HQ menu and then select the templates tab. Once you have found a template you would like to use, tap the title. You will then be prompted to select a project this observation will belong 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



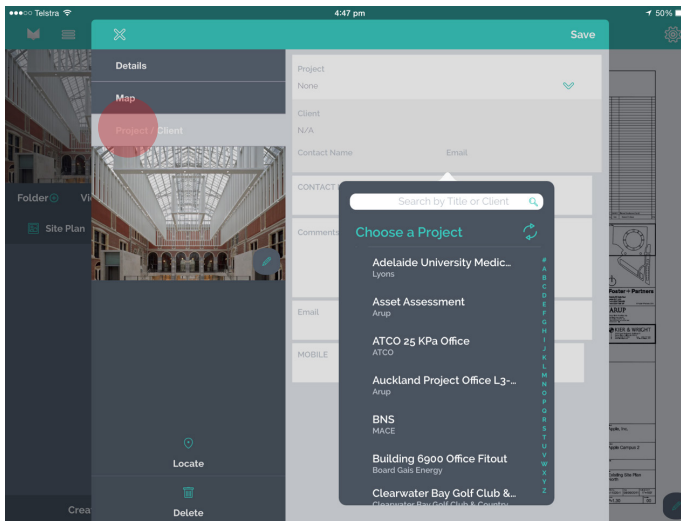
This approach is the same as starting with a template, only in the reverse order. Rather than selecting a template then a project, in this approach you will first select a project then be prompted to select a template.

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.

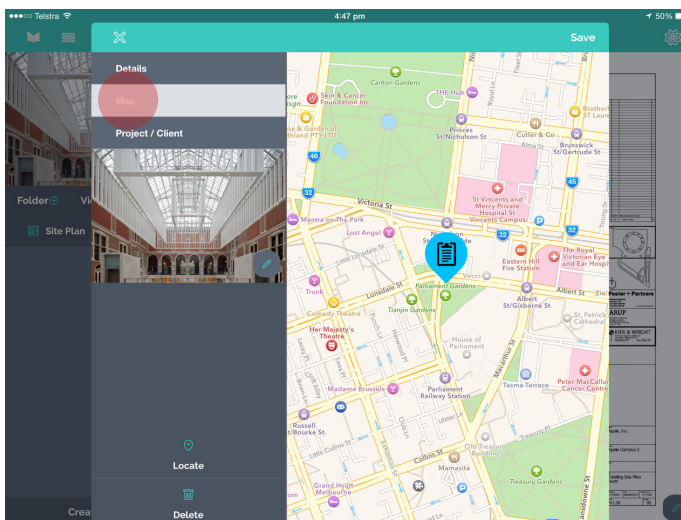
Project/Client tab



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.

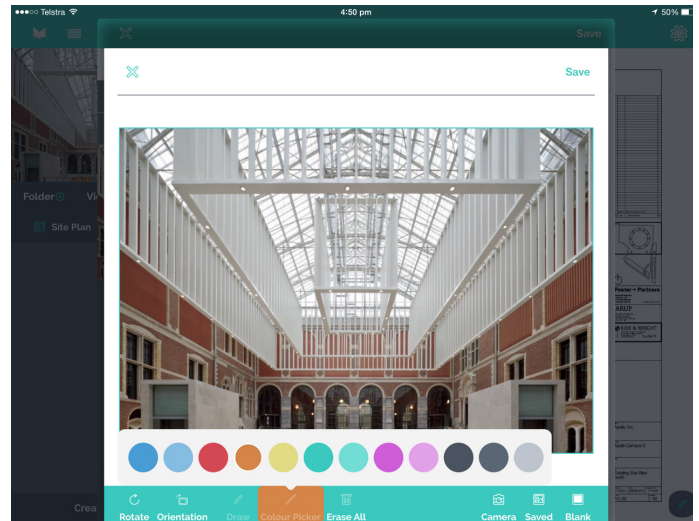
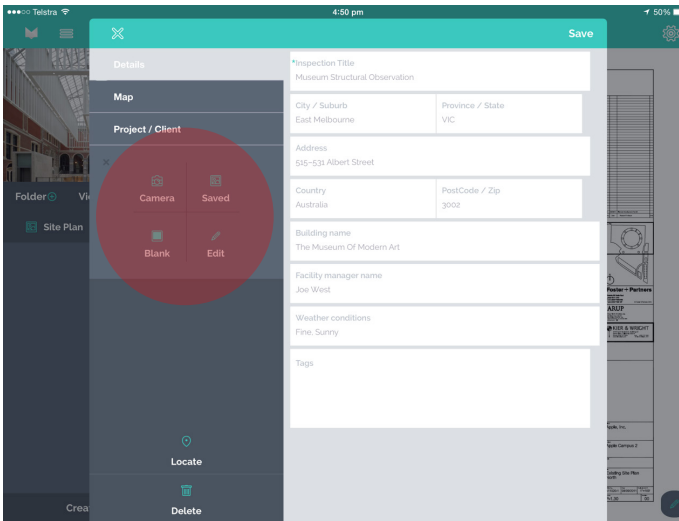
The project the observation is associated with can be changed at any time by using the drop-down menu and selecting another project.

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

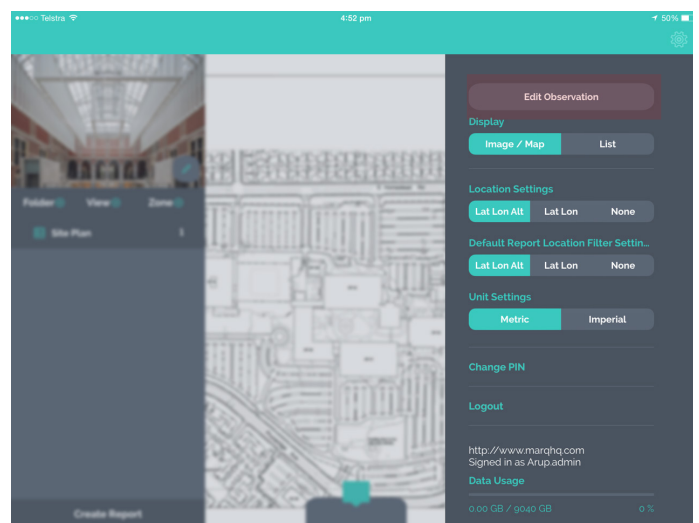
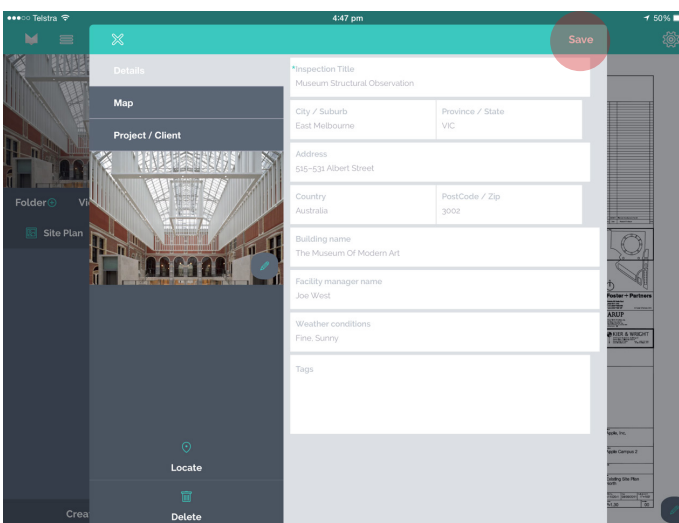


You also have the option of adding a cover image for the observation. This image will become the cover image visible on your iPad dashboard, your Marq HQ projects page and in the reports generated for the observation.

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.

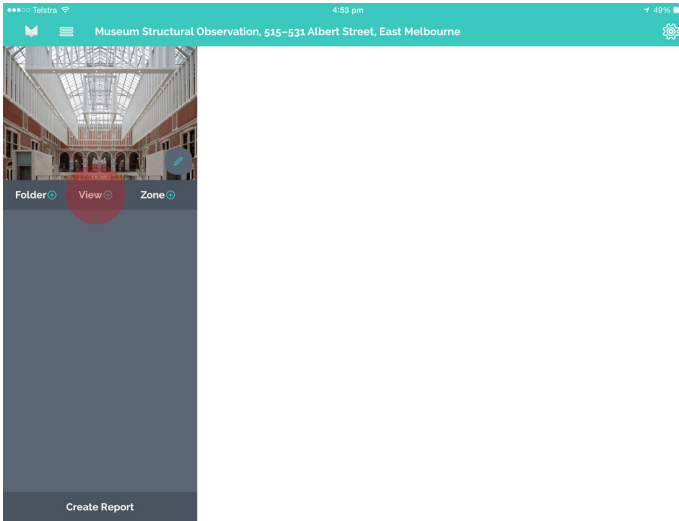
Once an image is selected the edit screen will allow you to mark-up the image using the draw tool and a selection of 12 different colours.

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

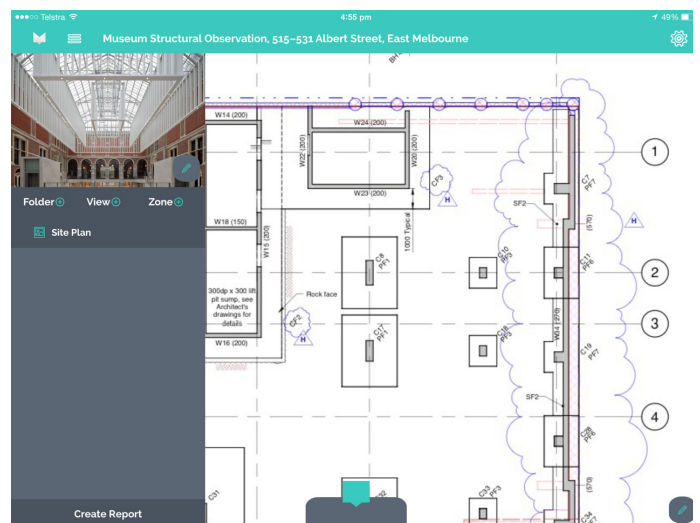
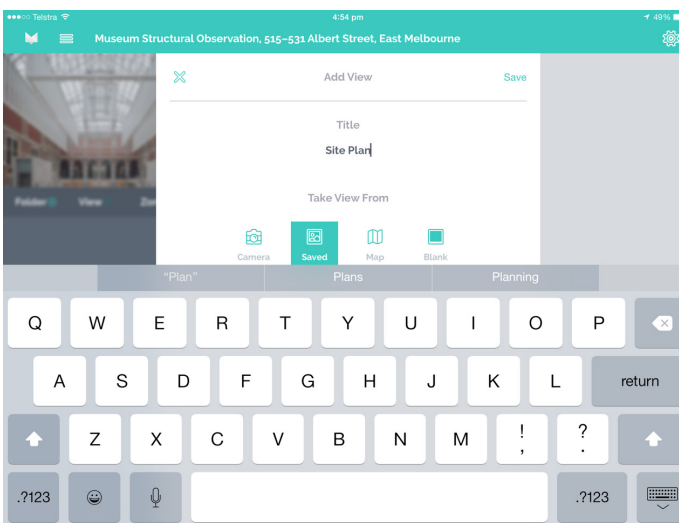


To start capturing data the best place to start is adding a View. A View is a background image, PDF or map on which you drop Marqs that indicate the location of an issue.

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

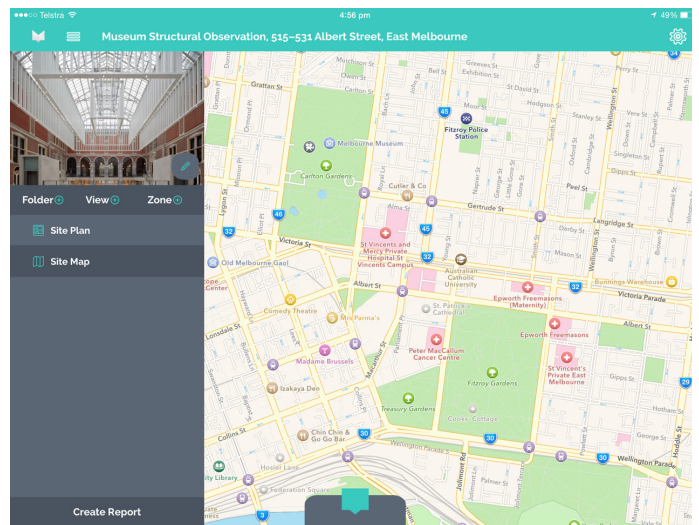
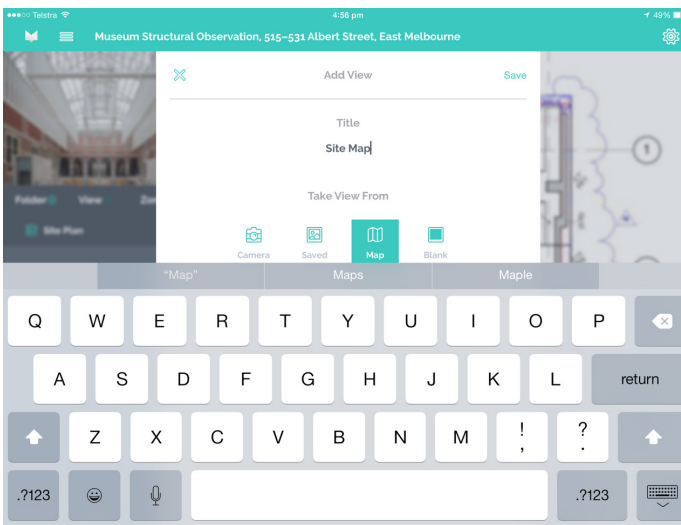


PDF and Existing Image Views operate in the same way. Both types of views need to be loaded onto the iPad and saved in one of the image galleries. You can upload files into the image galleries using numerous applications such as email, Dropbox, ProjectWise, Google Drive, Evernote etc.

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.

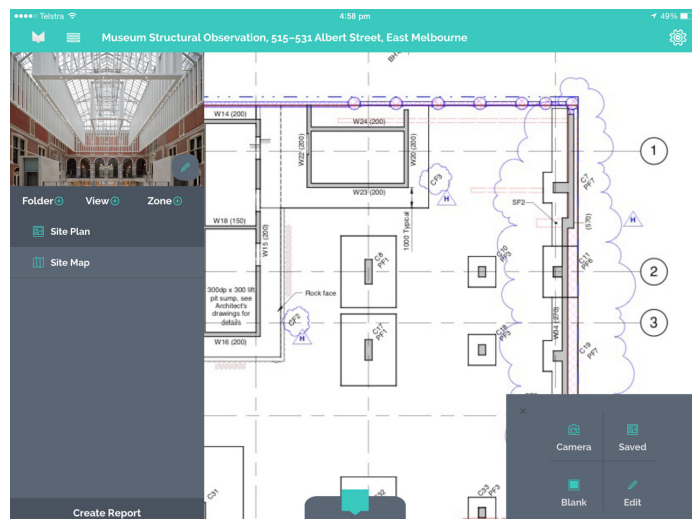
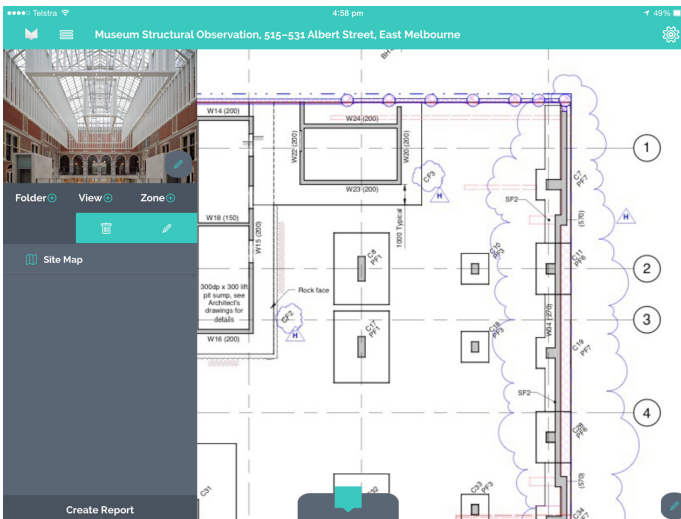
Map views



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.

Editing views

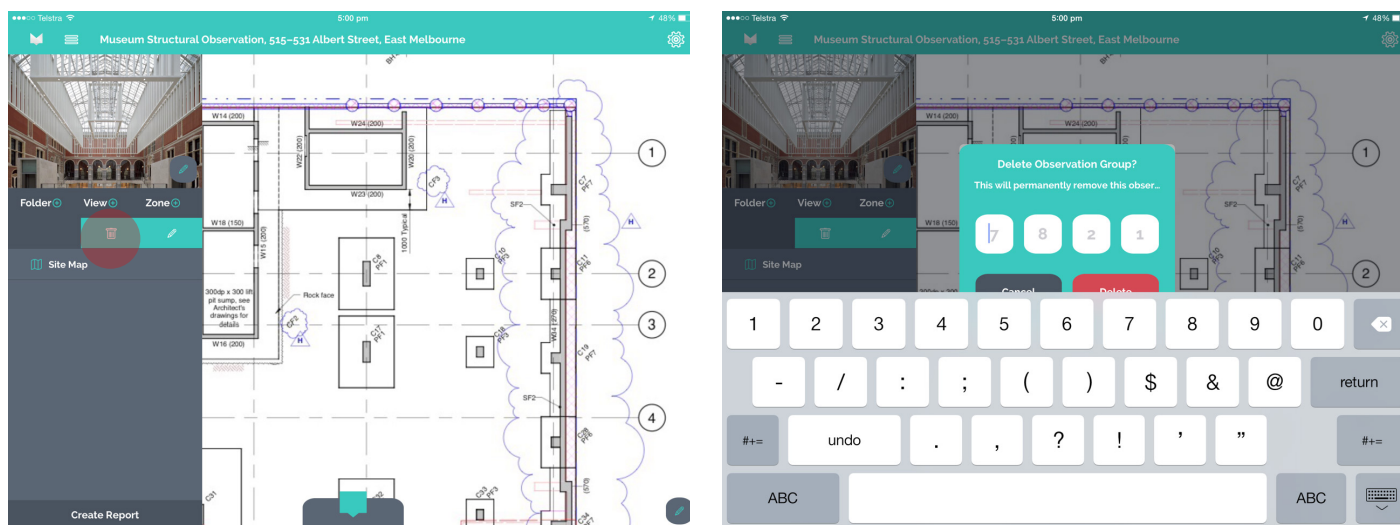


Views can be deleted, copied, copied with Marqs or their titles edited by using your finger to swipe right to left on the View tab. The swipe motion will reveal the icons for the various options.

The View itself can also be edited by select the edit icon visible at the bottom right of the View. The View image can be changed using the iPad camera, by selecting an existing image from the iPad image galleries or by selecting a blank white background.

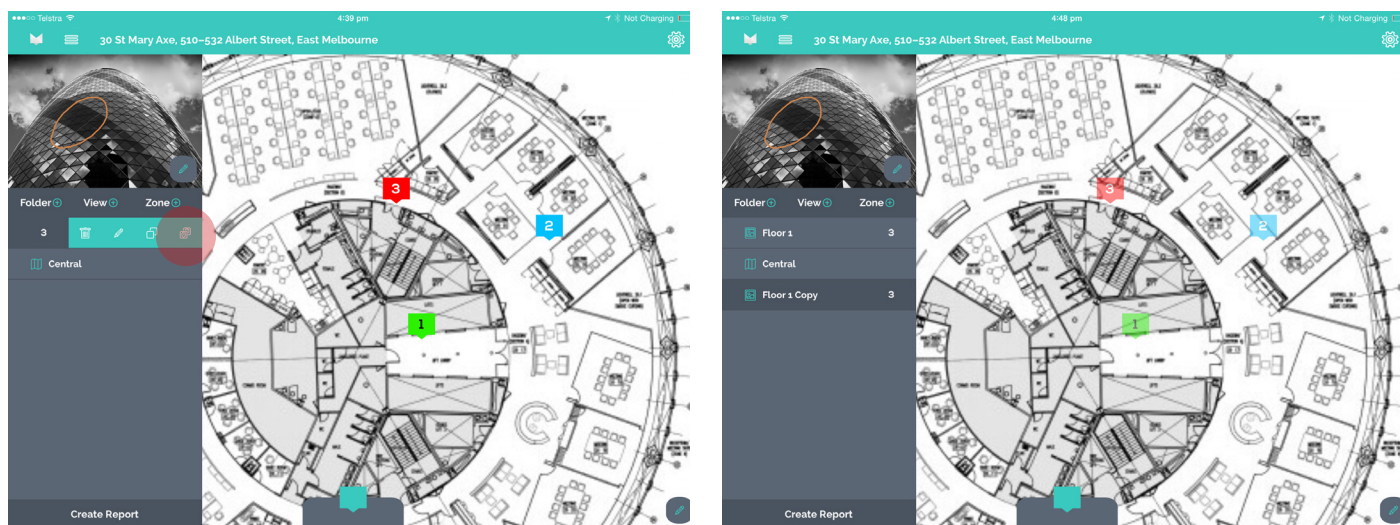
The current View image can also be edited using the edit option. This will allow you to mark-up the image using the draw tool and allow you to crop and rotate the image.

Deleting views



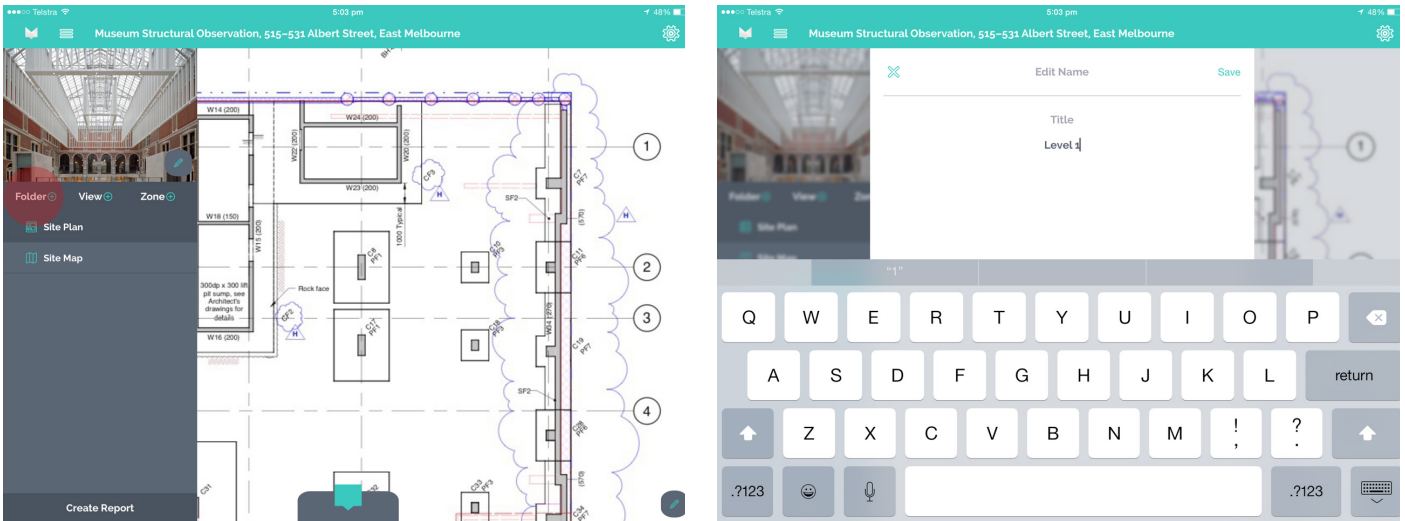
When deleting a View a pop up containing fields with four numbers will appear. To delete simply type in the numbers that you see in each field then select delete. This is a precautionary measure to ensure that you do not accidentally delete critical information by mistake.

Copying views



When copying a View with Marqs the copied Marqs will not appear in the final report without confirming each of them. The copied Marqs will appear opaque on the copied View, to confirm them you will need to enter each individually and select save. Confirmed Marqs will appear in full colour and will no longer be opaque.

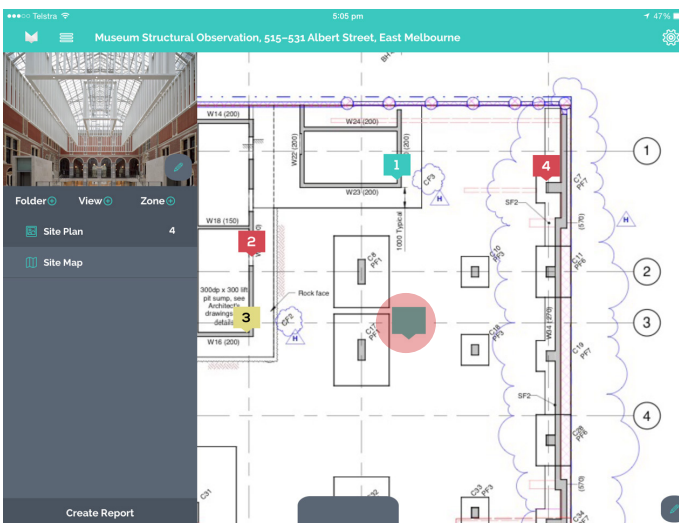
Adding folders



Folders can be used to help organise your Views. To add a folder simply select the Add Folder icon on the left hand menu and provide a title. Views can be added whilst in the folder or can be added by dragging and dropping them into a folder.

Folders can also help you filter the data that appears in your final report. For example, if you choose to have each folder represent an individual floor of a building you can simply filter your report to show data about an individual floor in the directory section in the report filter.

Adding Marqs

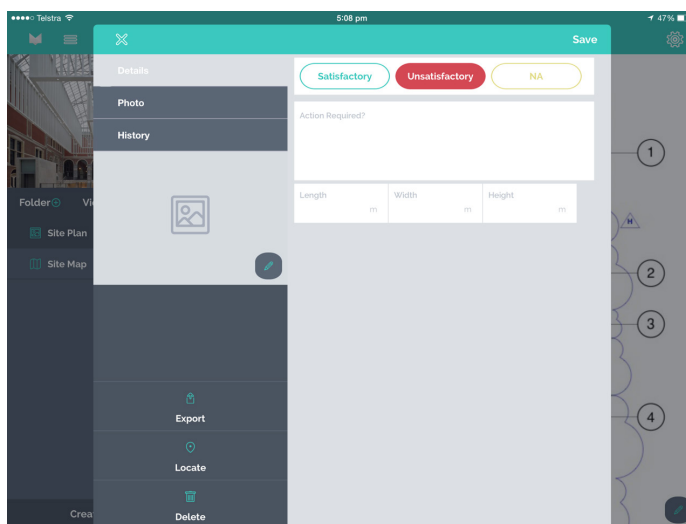


Marqs provide a way of capturing data and images relating to a particular issue. Marq icons are placed on Views that represent the location of that particular issue requiring attention, helping project stakeholders to understand issues in spatial context.

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.

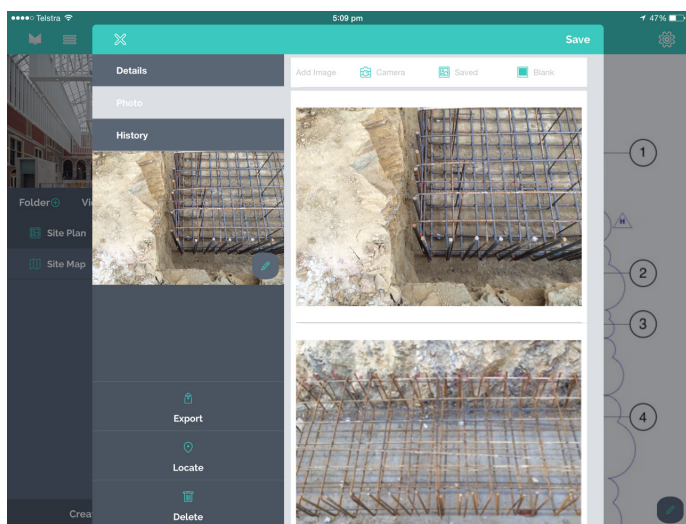
Once you have placed a Marq on the View you will be prompted to enter data and images based on the issue you are observing.

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.

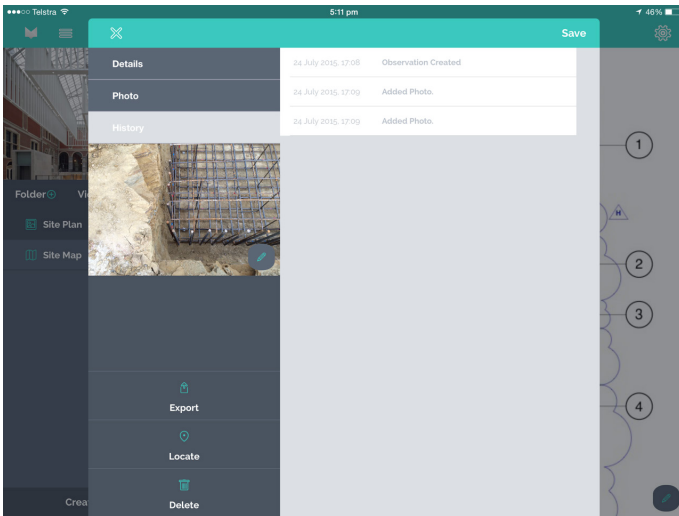
Marq photos tab



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.

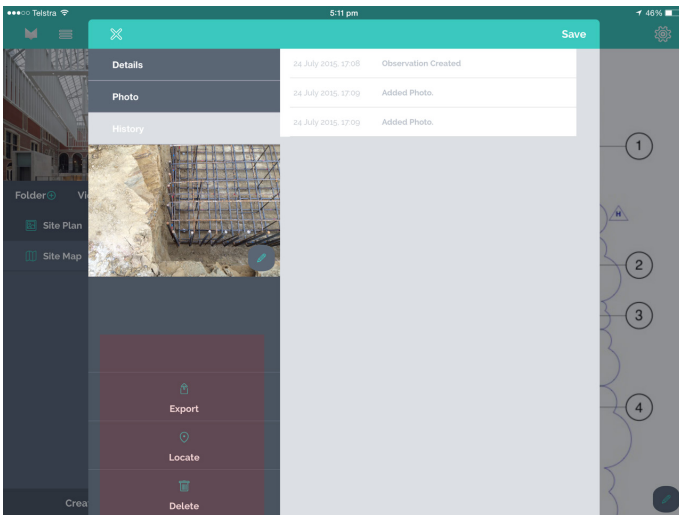
You can add as many images to each Marq as you like however it is worth noting that the number of images and their quality will directly affect the file size of your observation and reports. If you are using a Free, Basic or Advanced version of the app this can have an effect on your data storage allowance.

Marq history tab



The history tab provides a history log of all activity associated with a Marq. The log records the time and date each event occurred.

Other Marq options



Below the featured image you will see a number of icons; Export, Locate & Delete.

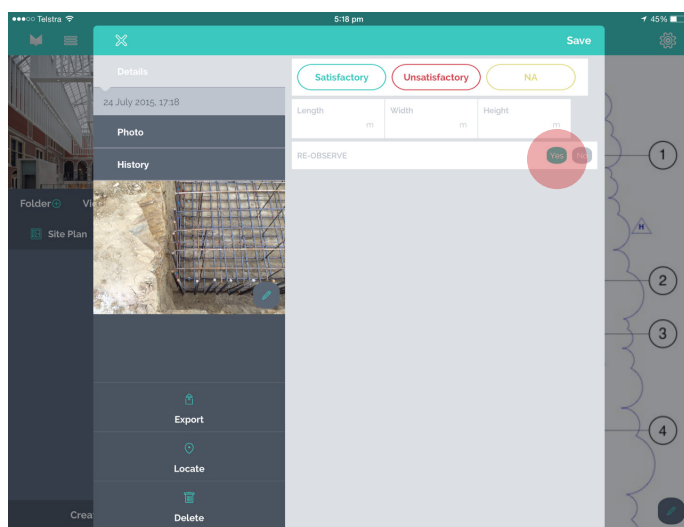
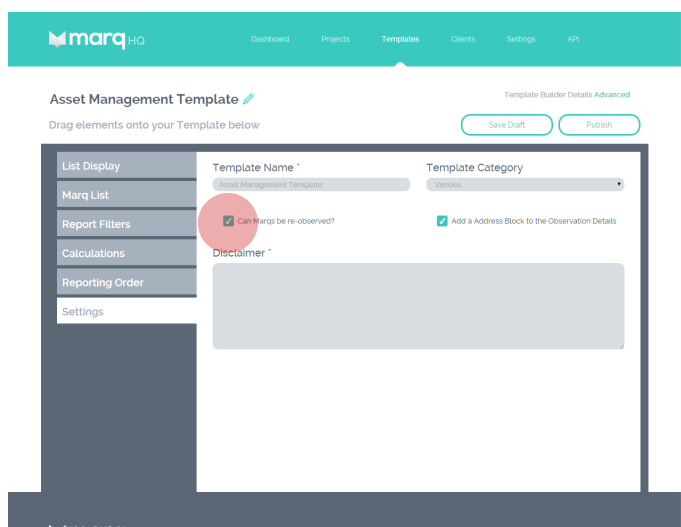
The Export icon gives you the choice of whether you would like to export the Marq and its data in the final report. Marqs will be set to export as default, however you do not want to include the Marq in the final report simply click the icon, you will notice that the colour will turn from green to grey.

The reason for the export feature is to allow users to place Marqs and record data simply for their own reference, by unselecting Export it will ensure that the Marq data is visible only to the user and not those viewing the final observation report.

The Locate icon allows you to initiate the GPS to update the coordinates of your location. The GPS data will be displayed in the final report under each photograph. The GPS data displayed will also be dependent upon the Location Settings selected in the Settings Menu.

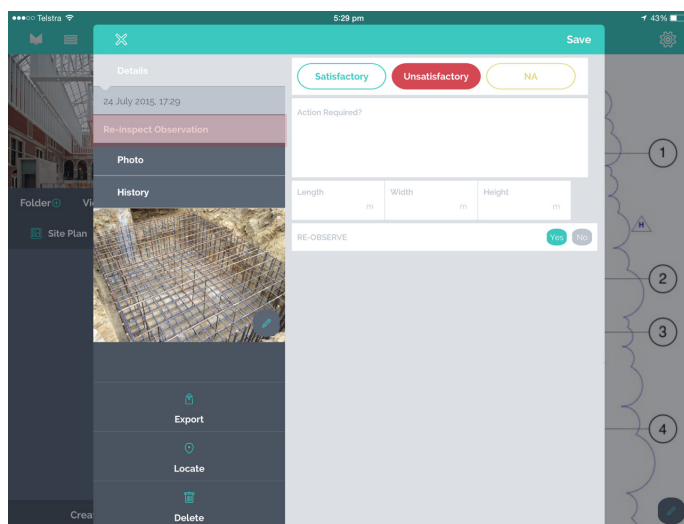
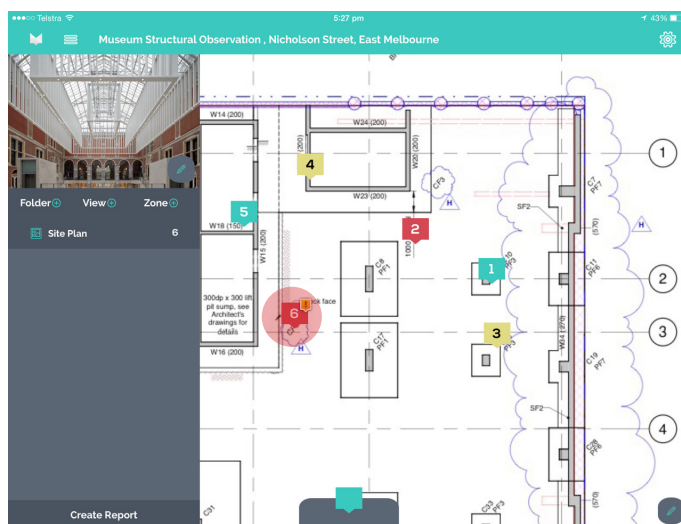
The Delete icon allows you to delete the Marq and all its associated data. If selected, the delete confirmation code will appear as a precaution. To confirm the deletion simply type the numbers displayed in the 4 fields and select delete.

Re-Observing Marqs



If you selected the option that allows Marqs to be re-observed during the creation of your template then you will have the option of using the re-observe feature within your Marq.

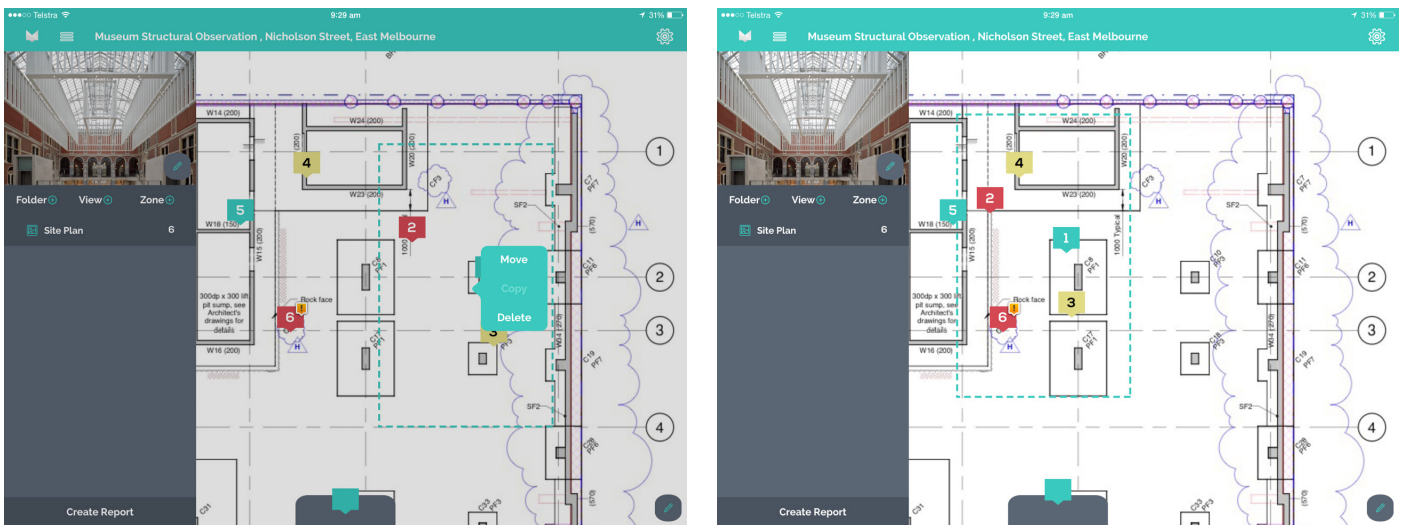
Templates that have the re-observe feature enabled will have a re-observe question present in each of the Marqs. By selecting Yes, the re-observe feature flags the Marq as needing additional attention and requiring the issue to be checked again at a later time. Marqs that have been flagged for re-observation will appear with an exclamation mark.



To re-observe a Marq that has been flagged simply enter the Marq and select the Re-observe Marq tab on the left hand menu. The time and date of your re-observation will be automatically recorded and a blank list of questions will be available for you to enter new data relating to the issue.

Marqs can be re-observed as many times as you like. The re-observations will be automatically recorded in the Marq history and the number of times each Marq has been observed will be visible on the Marq icon.

Editing Marqs on a view



Marqs can be copied, moved or deleted by pressing and holding a point on the screen then dragging the selection box over the Marqs you wish to edit. After letting go the edit options will appear.

Moving Marqs

To move Marqs to a different location on a View select the Move option then simply drag the selection box to the new location.

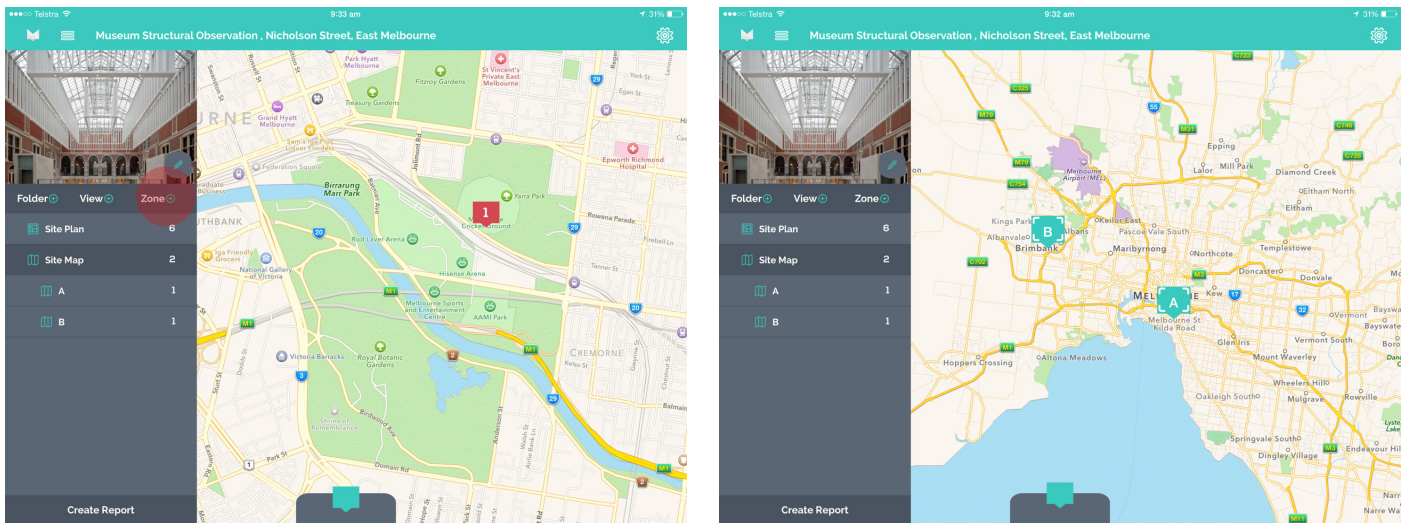
Copying Marqs

To copy Marqs on the View select the Copy option, press and hold the point on the screen where you want to paste them then select the Paste option.

Deleting Marqs

To delete Marqs on the View select the Delete option then fill out the numbers you see in the four fields then select Delete.

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.

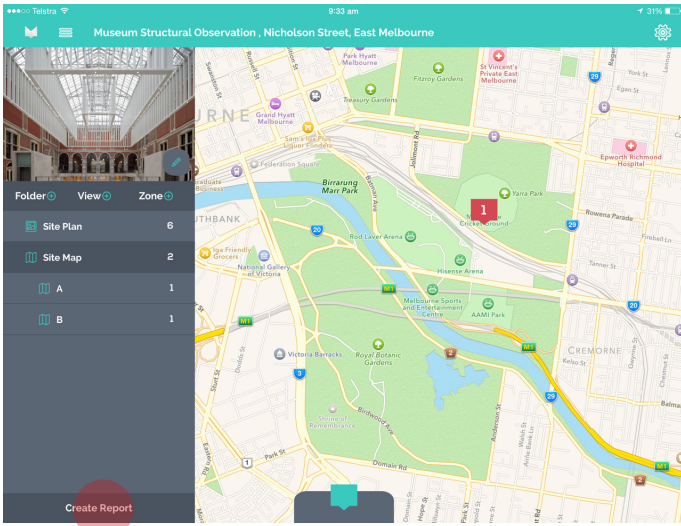
To create a Zone simply zoom into an area of your Map or Image View and select the Add Zone icon in the left hand menu. This will turn the area into a Zone in which Marqs can be placed.

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.

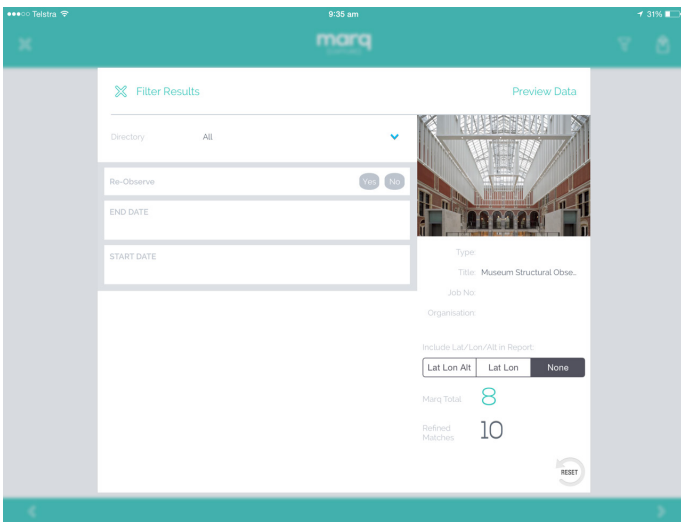
8. Creating reports

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).

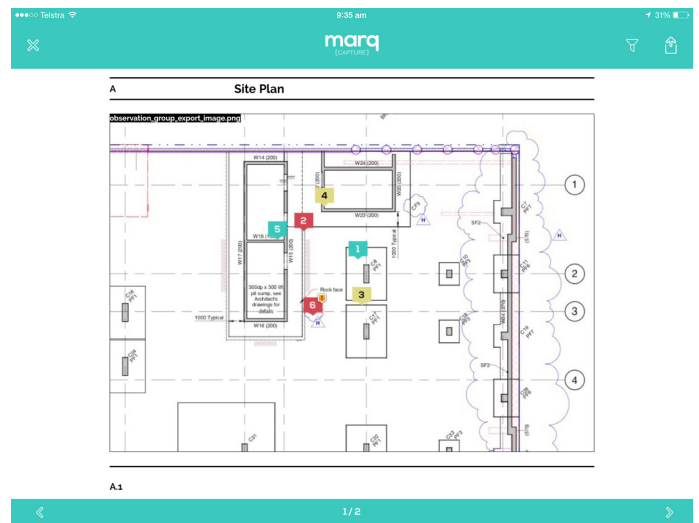
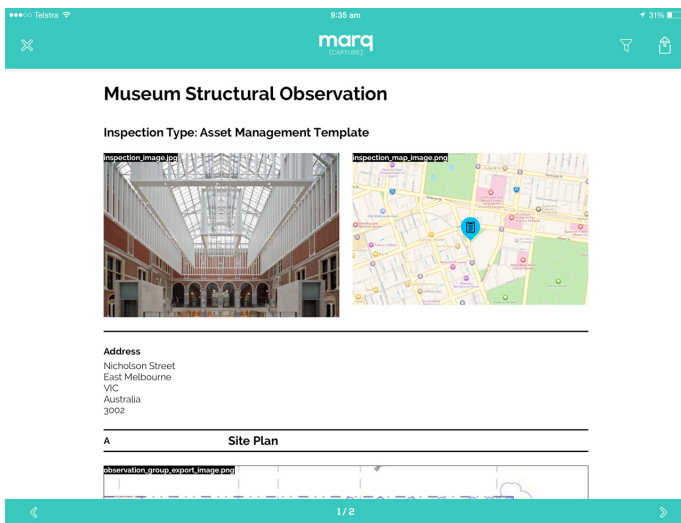
You can also select what location data you would like to display in the final report. You can choose to display;

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

You can track the number of Marqs that have been filtered out of your report by comparing Refined Matches to the Marq Total.

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

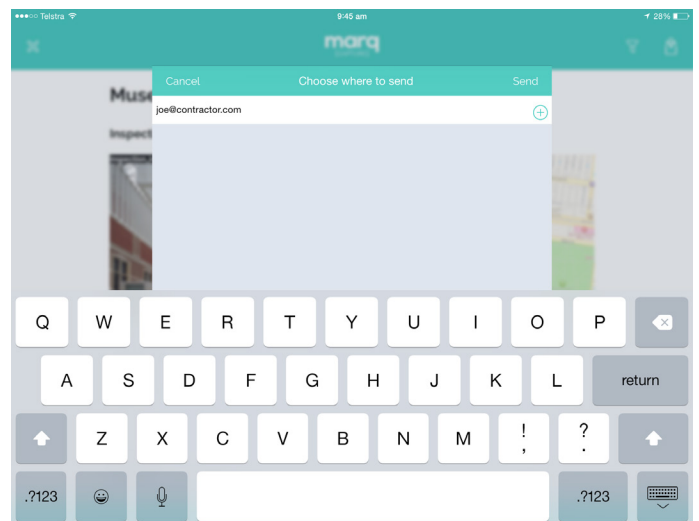
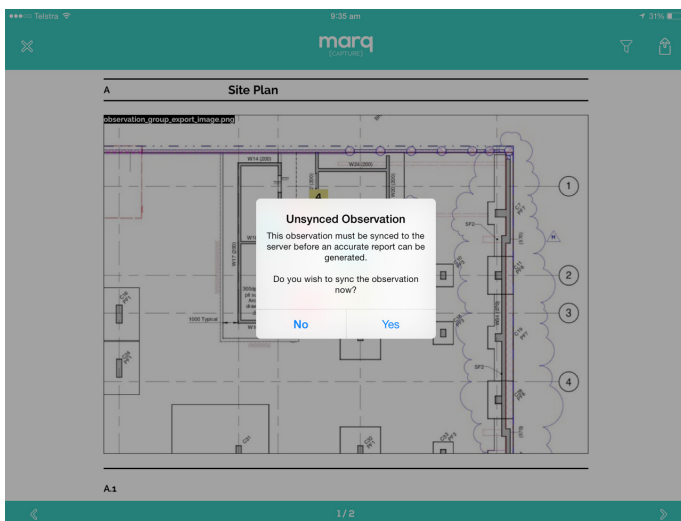
Preview report data



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.

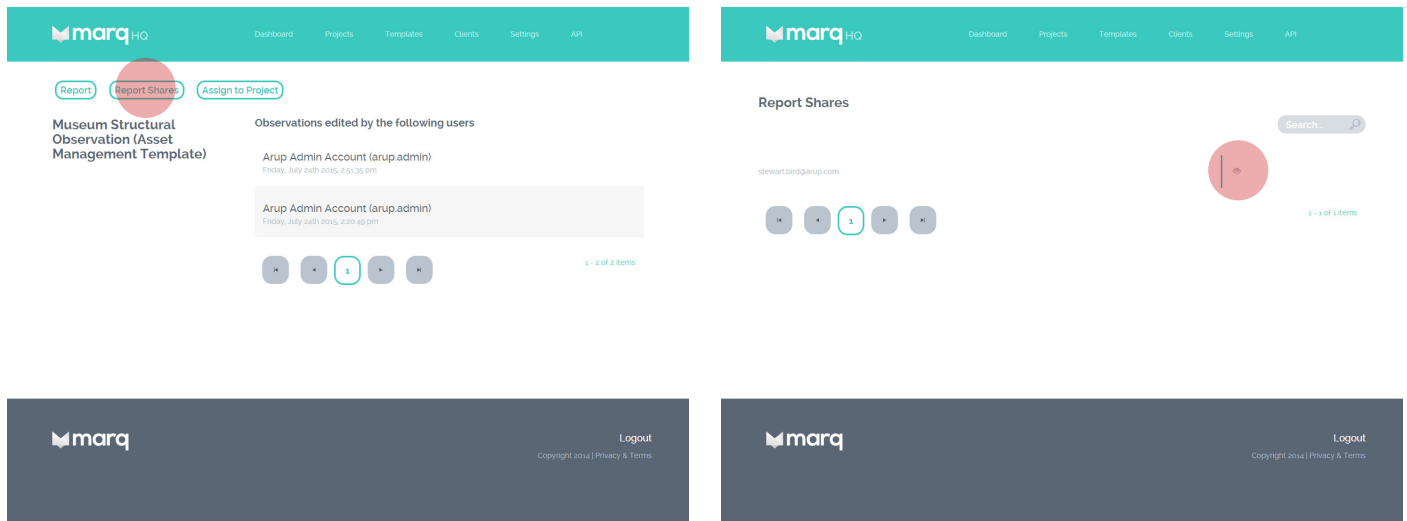
You will be prompted to sync your observation with Marq HQ in order to generate the report. It is recommended that you do this whilst on a wifi connection if the Observation is of a large size. Syncing whilst on a 3G or 4G connection could consume a large amount of your plan's data allowance.

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.

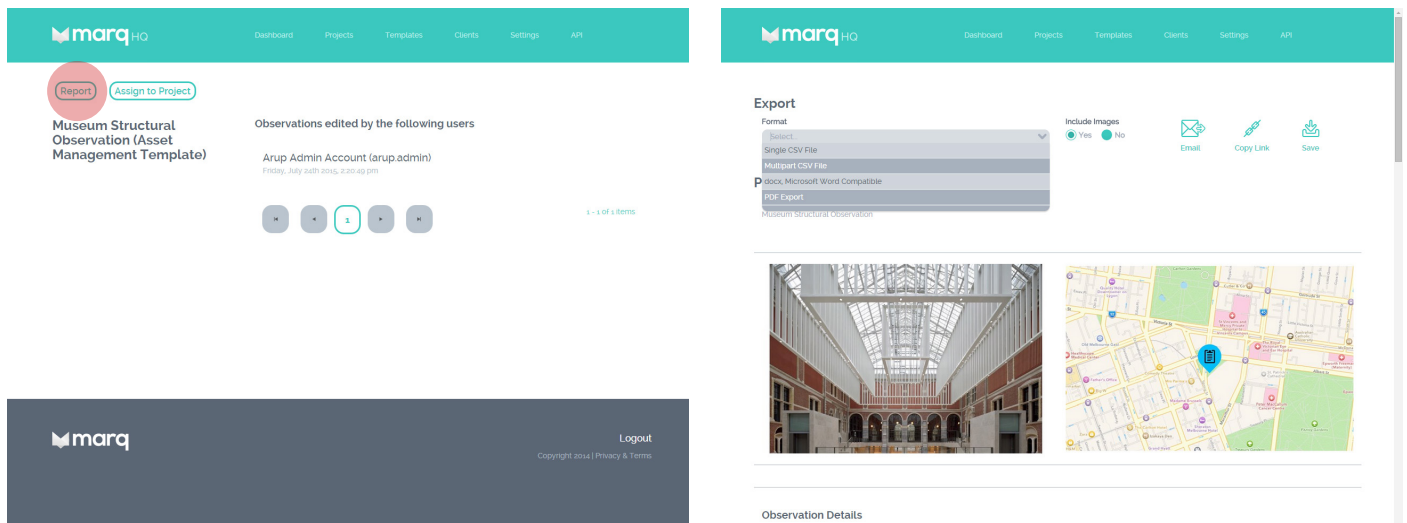
Sent report history



When a report has been sent to project stakeholders a history of who it has been sent to is recorded. You can view this history by heading to the Observation page and selecting the Report Shares button.

This will then bring up a list of email addresses the report has been sent to. Even if the Observation has since been edited, you can view the version of the report that was sent by clicking on the view icon.

Generating reports in Marq HQ

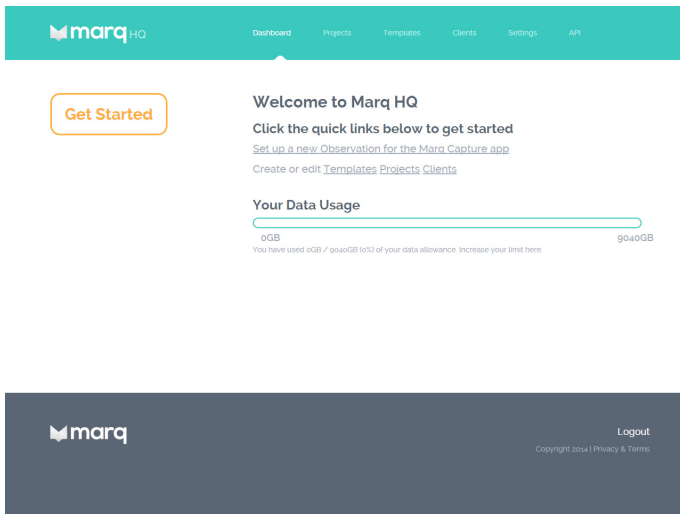


Once an observation has been synced to Marq HQ the observation report will be available for viewing online.

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).

9. Marq HQ



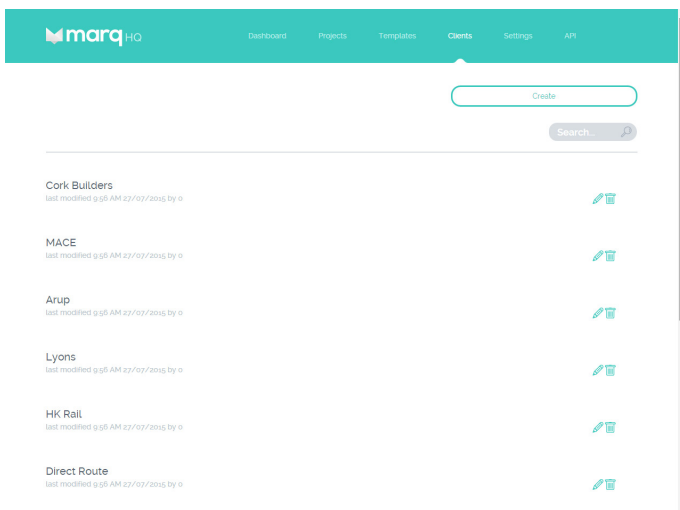
Marq HQ is your Marq control panel. This is the web management system that allows you to create and control everything that you will use the Marq Capture app for.

Marq HQ allows you to management your account, create and manage project teams, create and edit templates and save and manage your observations.

9.1 Managing clients

The first step to creating a new Project and Observation is to create a Client. All Observations belong to a Project and all Projects belong to a Client. The Client management section of the Marq HQ allows you to create, edit or delete Clients.

Creating a client

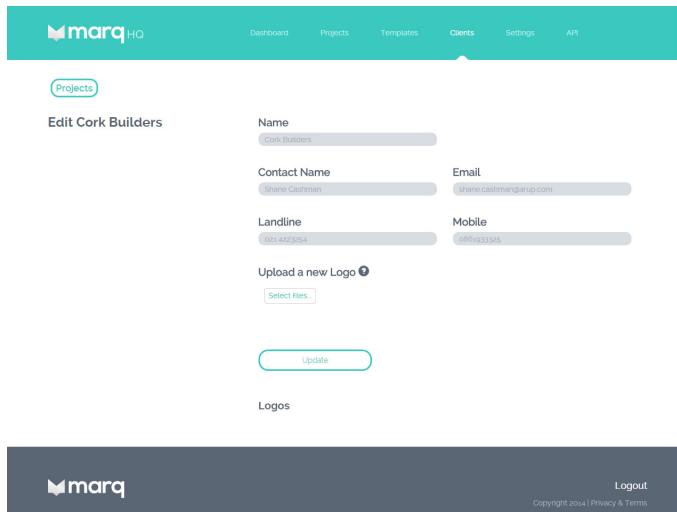


Before creating a new client it is best to check whether the client already exists in the client list, this helps avoid duplication.

To create a Client click the create button in the client management page.

Type the name of the Client and select save. The new client will then be added to the client list.

Client details page



The Client Details page is where you can manage the information about the client. The page allows you to edit the client's name & logo. The page also provides a link to all projects belonging to that client.

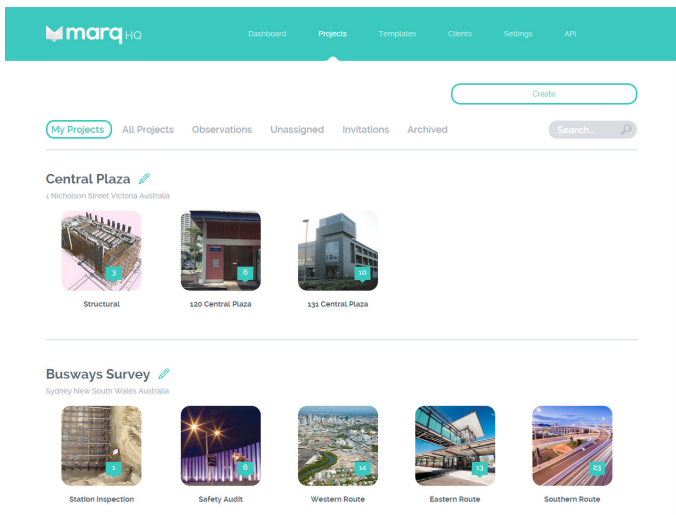
To edit the client's name simply enter the revised name in the Name field and select update to save.

The client's logo will be automatically placed in the header of any observation reports generated belonging to that client. To upload a client logo select the Upload Logo button, Select file, select the logo you wish to upload from your computer, and once loading is complete select Save.

9.2 Managing projects

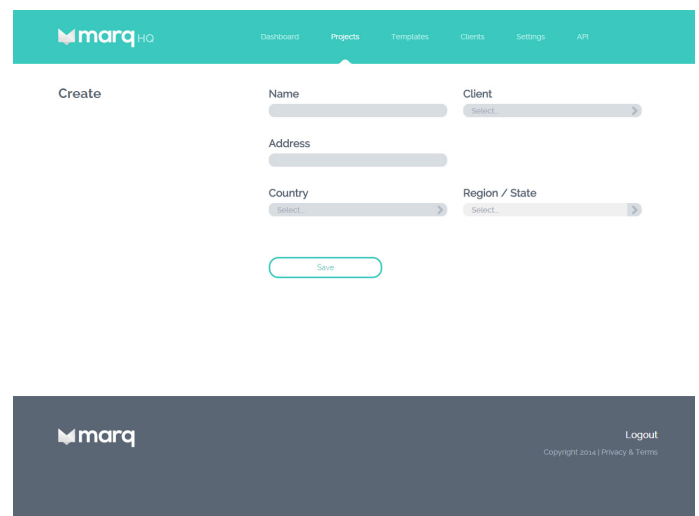
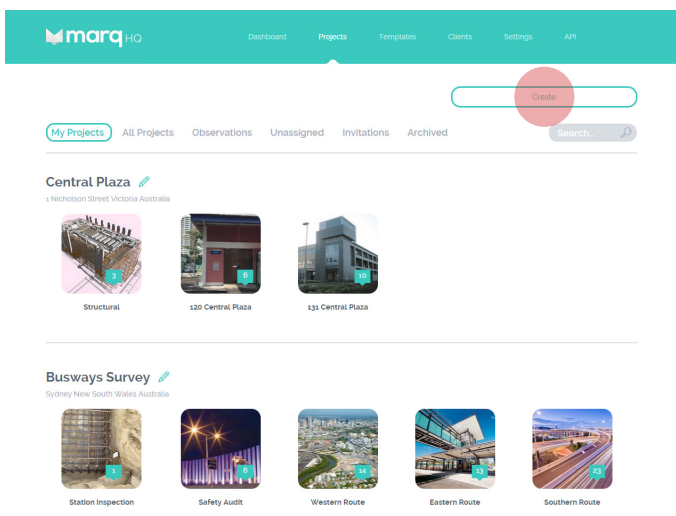
Each project can have multiple Observations, multiple users & multiple reports belonging to it. The Project section of the iConsole is where you will manage all of these aspects. This section will show you how to create a new project and manage existing projects.

The Project Dashboard



The project dashboard displays all the projects you are currently working on and the observations for each. From the dashboard you can create new projects, edit existing projects, view archived projects and view your projects invitations that others have sent you.

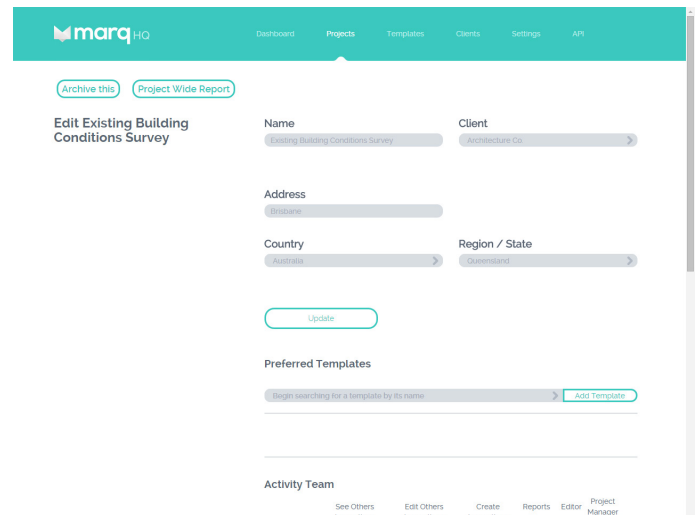
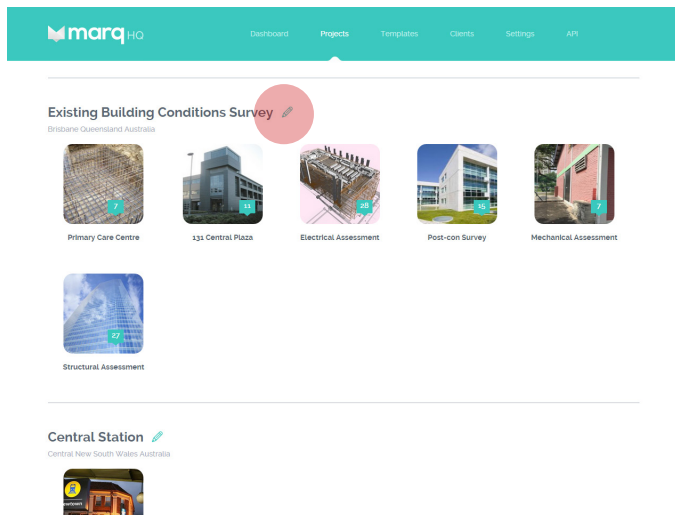
Creating a project



To create a new project go to Projects in the Marq HQ and select the Create button.

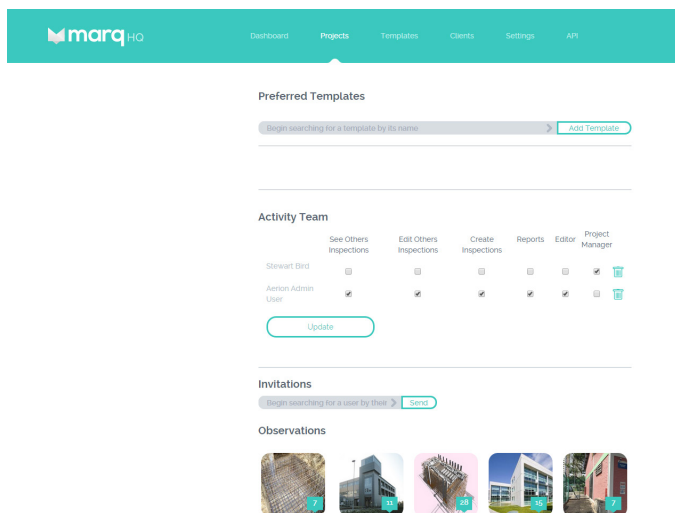
Fill out the project details and select a client from the list. If multiple logos have been uploaded for the client select the one you would like to use in the project's reports then click save.

Managing a project



To manage the details of your project simply click on the project title or the edit icon next to the project title. This will bring you to the project details page. From here you can edit the project details select a client logo that you would like to include in the project's report, manage your project team and view the project's observations.

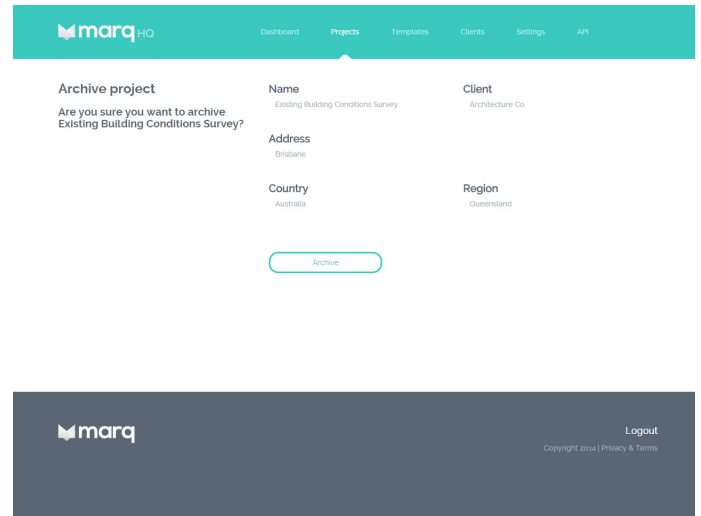
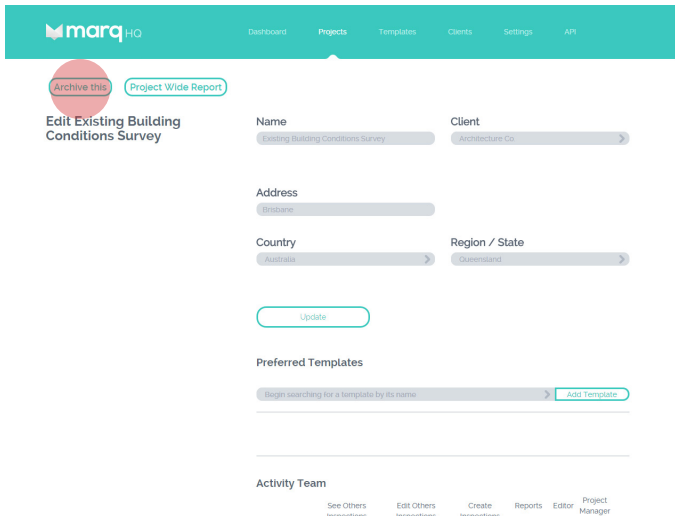
Managing your project team



In the project details page you can manage the team that will work on the project. To start your project team use the search bar to find other Marq users by typing their name. Once you've found them, select send to email them a project invitation.

Once the user has accepted you will be able to edit their role on the project in the project details page.

Archiving a project



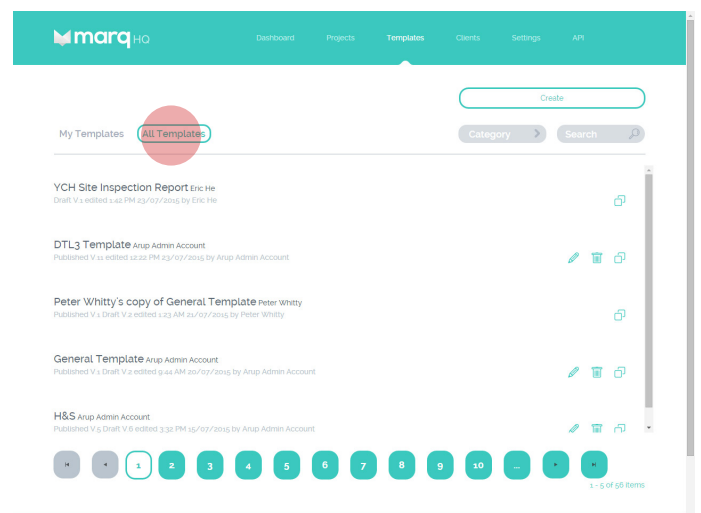
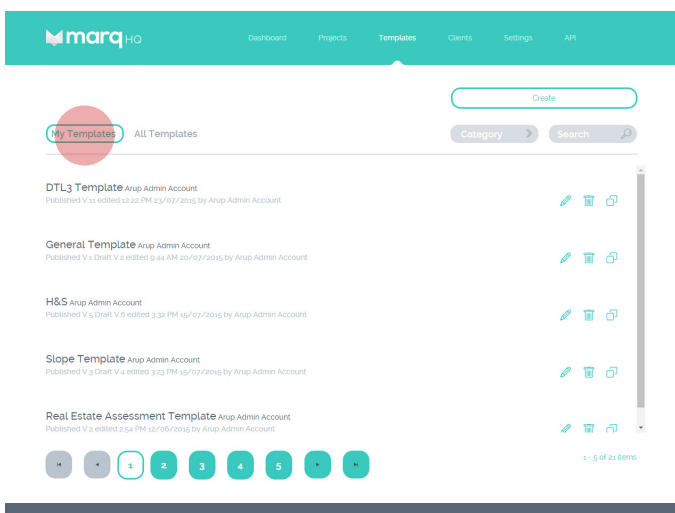
Projects that have been closed out or that you no longer need can be archived. Archiving a project will remove it from your dashboard whilst still retaining all the project data. An archived project can be accessed at any time in the future.

To archive a project simply enter the project details page and select Archive this project at the top of the page.

9.3 The Template Manager

The template manager is where you can create custom templates specifically for the information you need to observe on site. You can create a wide range of templates from simple text forms to templates that involve sophisticated calculations and variables.

Managing your templates



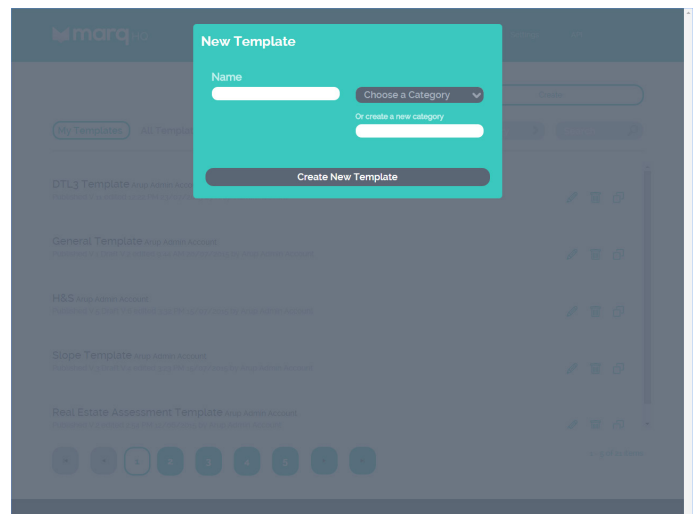
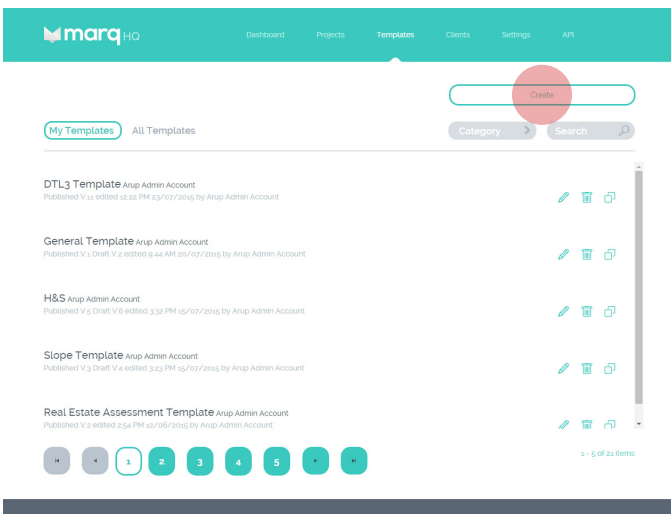
In the templates section of Marq HQ you will see a list of templates. Templates are divided into My Templates and All Templates.

My Templates are the templates that you have created and All Templates are the templates created by other people within your organisation. In this page you can search templates by keyword or category.

You can edit and delete the templates you have created. However to edit templates created by others you need to first make a copy.

9.4 Creating a new template

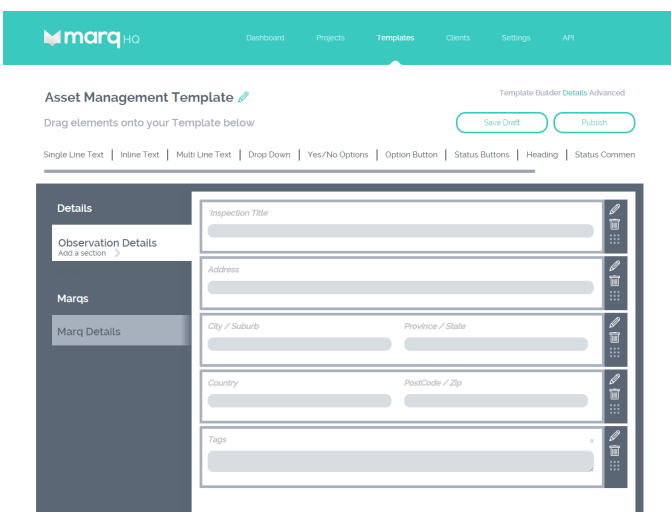
The basics



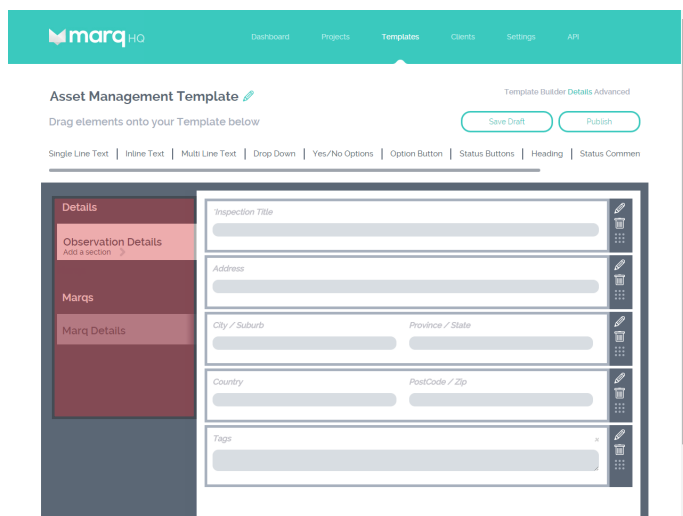
To create a new template simply select the Create button at the top right of the template page.

A pop up will appear prompting you to give your template a name and category. You can choose an existing category from the dropdown or create a new one.

Template Editor



Once you have given your template a name and category you will see the template editor screen. This is where you will define the set up of your template.



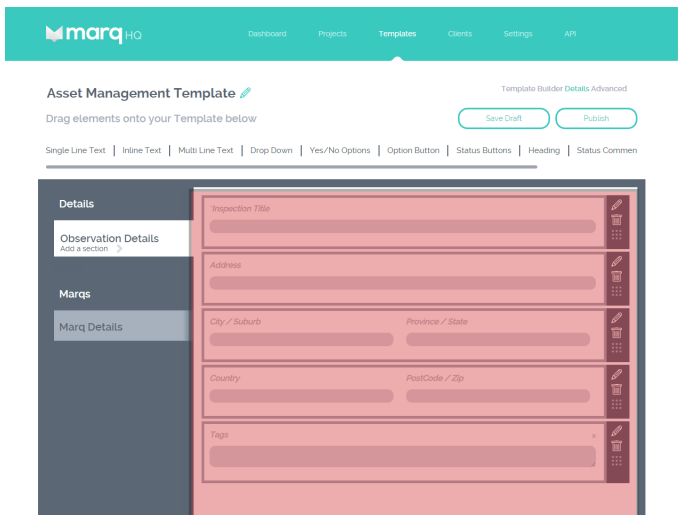
On the left hand side of the page you will see two tabs, Observation Details and Marq Details. These sections relate to different sections of the Marq Capture app.

The questions you define in the Observation Details tab relate to the high level information of your Observation. For example, the name of the observation, details about the site you are visiting, weather conditions during the visit etc.

The Marq Details section relates to the questions that will appear when you place a Marq on a plan or map in the Marq Capture app. These questions relate to specifics of an issue you are observing. For example, what you are observing, its condition, whether there is specific action required to address the problem etc.

You can also add additional tabs under Observation Details to better organise the information you need to address.

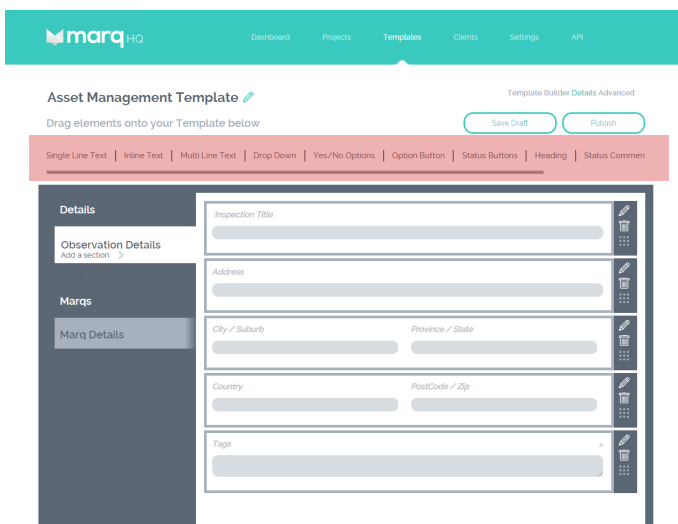
The Canvas



The Canvas is where you define how you will enter data whilst out in the field using the Marq Capture app. There is a different canvas for each tab.

We advise you to think carefully about how you arrange this section of the template as good planning can help streamline this process.

Elements



Elements are the fields that you will use to build your template and determine how you will collect data whilst out in the field.

There are 11 different elements you can use. Each element has a different purpose and provides a different way of capturing data.

Single Line Text

This element allows you to design a field that appears as a single line input. It choose whether it is a simple text input, email validation, time picker, integer, decimal or date picker.

Inline Text

This element allows you to design a field that has a visible title and a single line input that will appear next to the title on the same line

Multi Line Text

This element allows you to design a field with a larger, multi-lined text input.

Drop Down

This element allows you to design multiple options that appear in a dropdown format.

Yes/No Options

This element allows you to design questions with a basic Yes or No input.

Option Button

This element allows you to create an input on the iPad that give the user the ability to either select a contact from their iPad's contact list or allows the user to email the Marq's information to a third party.

Status Buttons

This element allows you to create up to 6 option buttons that can be colour coded and can be used to determine the colour of the Marqs on the iPad.

Heading

This element allows you to create a simple title block that is not editable in the iPad.

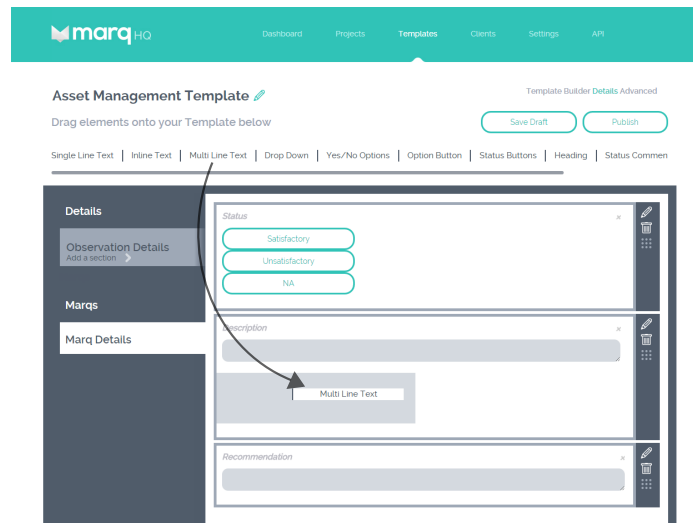
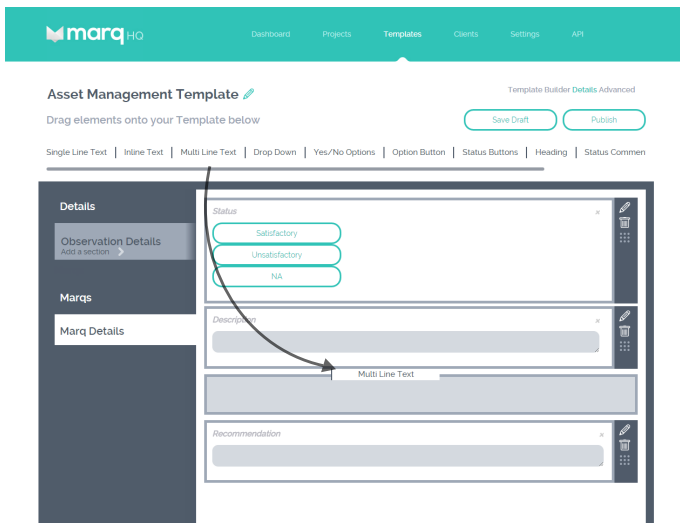
Status Comment

This element allows you to create multiple questions that all have corresponding Yes, No and N/A answer buttons.

Email Field

This element allows you to create a field on the iPad that only accepts the input of email addresses.

Compiling your template

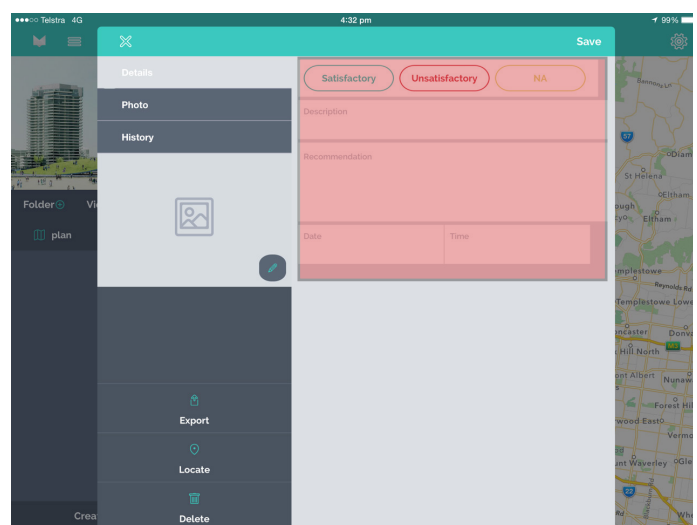
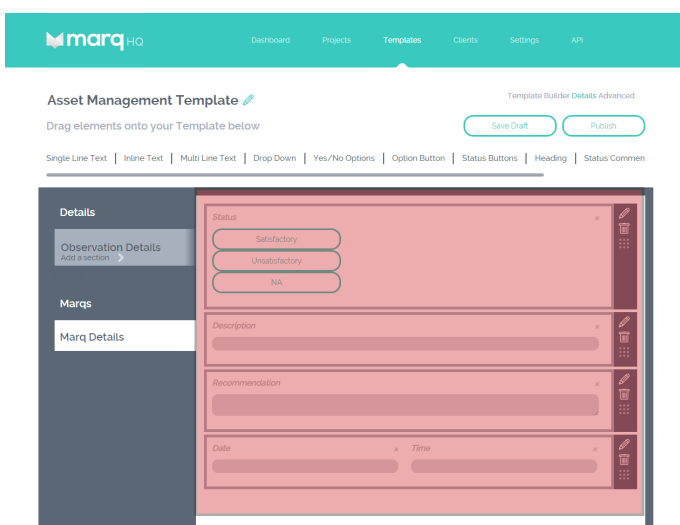


Now that you are familiar with the Tabs and Elements you can start compiling your template. You start by selecting the Tab you would like to edit then, selecting the Element you would like to use, drag and drop that element onto your canvas.

You will notice that a grey box will appear below where you hold the element, this indicates that you can place the element in that location.

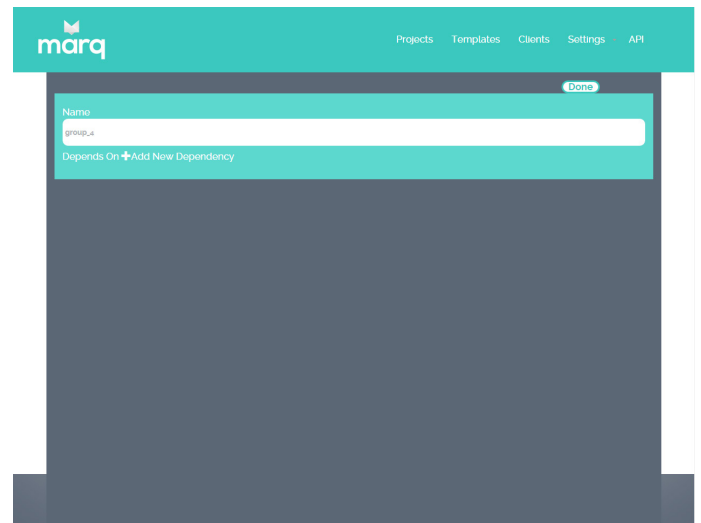
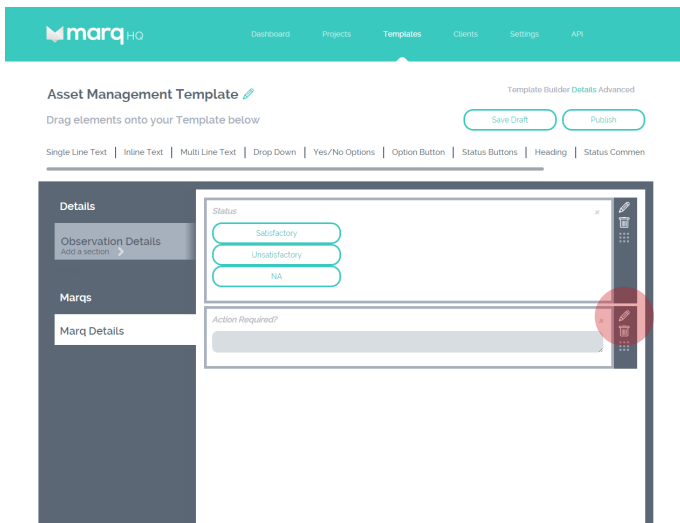
You can either drag an element to create a new group or place an element into an existing group. Groups represent a single line on the template, if multiple elements are dropped into the same group then they will appear side by side on the iPad. Not only do they define the layout of elements you can also attribute qualities to a set of elements in the same group, which we will explained in the next section.

Elements can also be dragged into, out of or between groups.



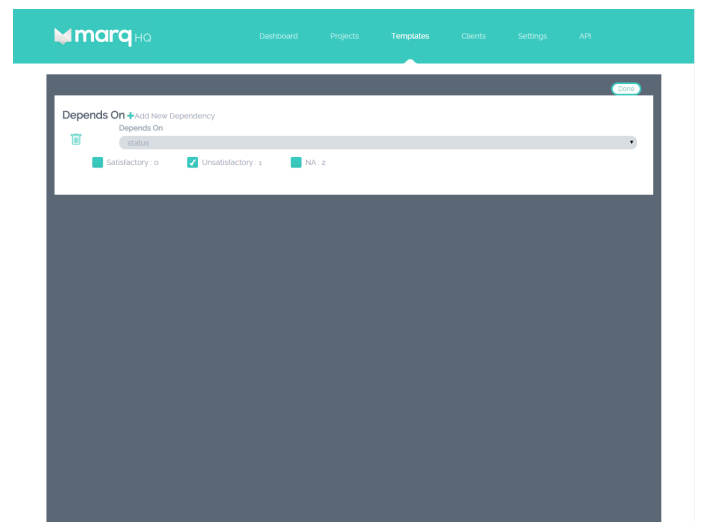
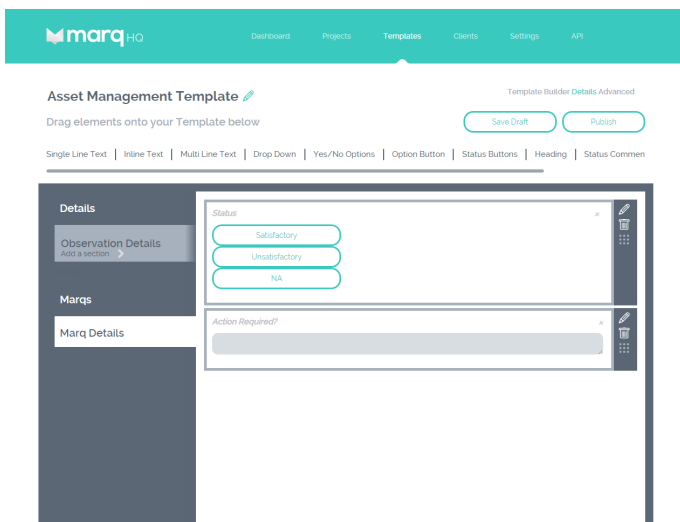
The images above show how the layout of the elements on the canvas correspond to the layout in the Marq Capture app.

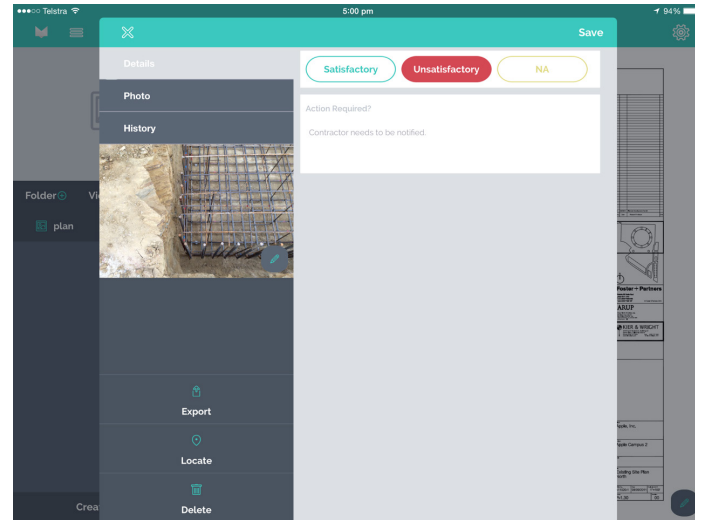
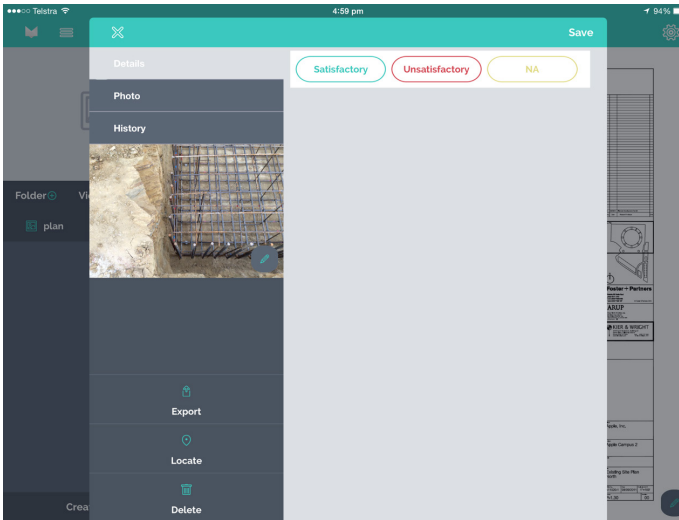
Group information



The groups that contain the elements on your canvas can be edited. To edit a group's information simply click on the edit icon at the top right of the group.

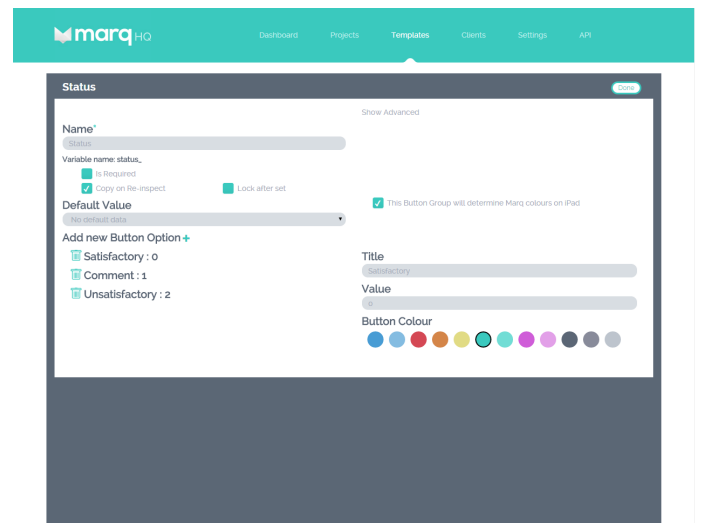
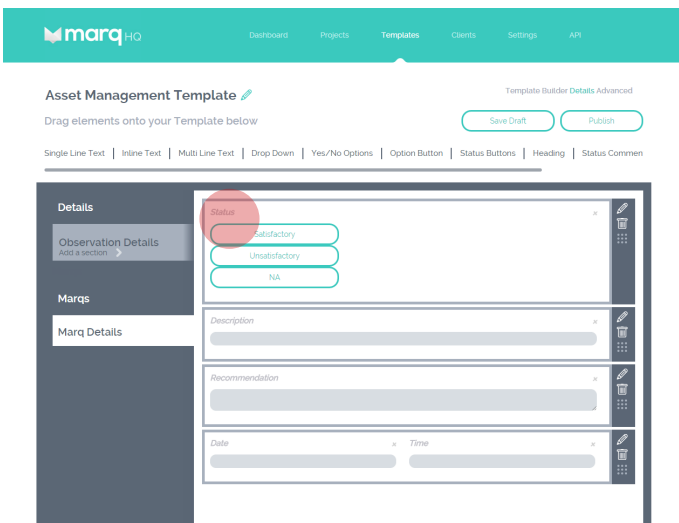
The edit section allows you to edit the group's dependencies. This means that you can hide the elements that belong to this group unless specific requirements have been met.





For example, if the status of a Marq is satisfactory then we may not need any action to be taken. However, if it is unsatisfactory we may need to specify the action required to address the issue. By making "Action Required?" dependent on the answer "Unsatisfactory" that element is only visible when Unsatisfactory is selected.

Element information

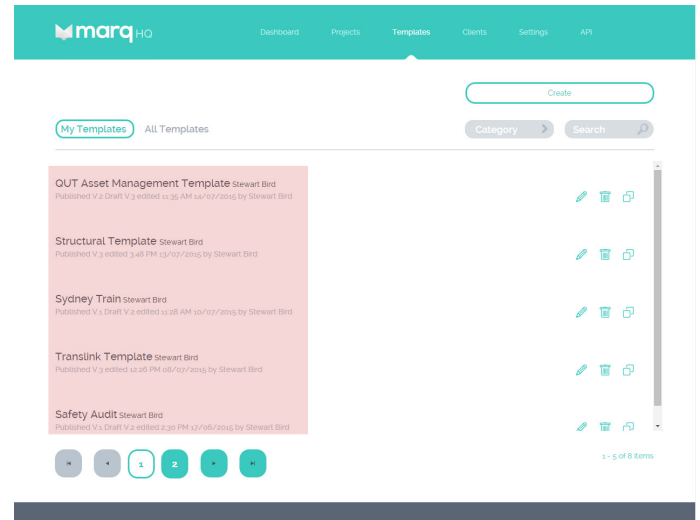
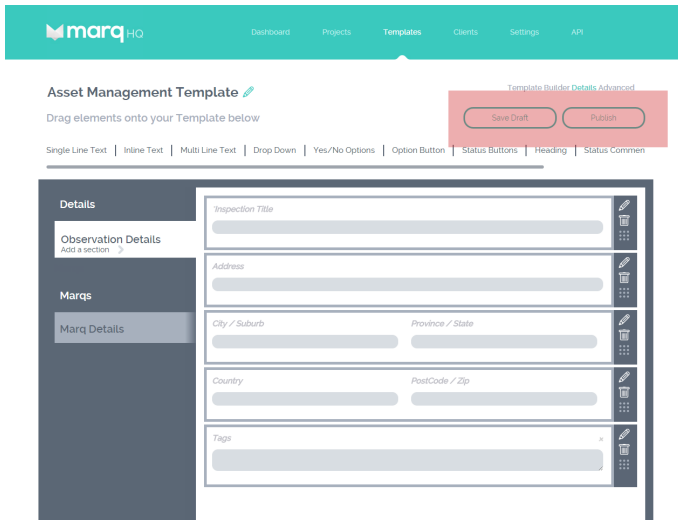


As with groups, each element contains associated information. To edit an element's information simply click on the element title.

The information associated with each element will depend on the type of element selected. The information specific to each element type is explained in detail on page 39.

Most elements will allow you to edit the basic information such as its title, whether an answer is mandatory, whether its information can be edited on the iPad etc. Many also offer the ability to edit a number of advanced fields such as, attaching guidance information to the element, changing the meta information, restricting the number of characters the user can enter etc.

Saving your template



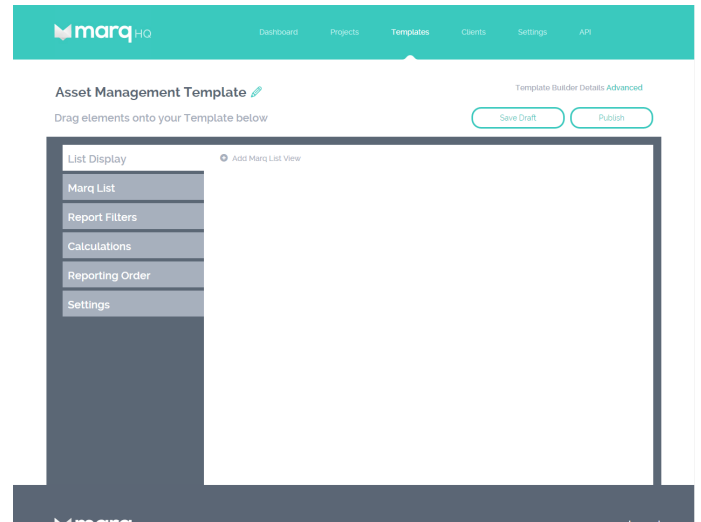
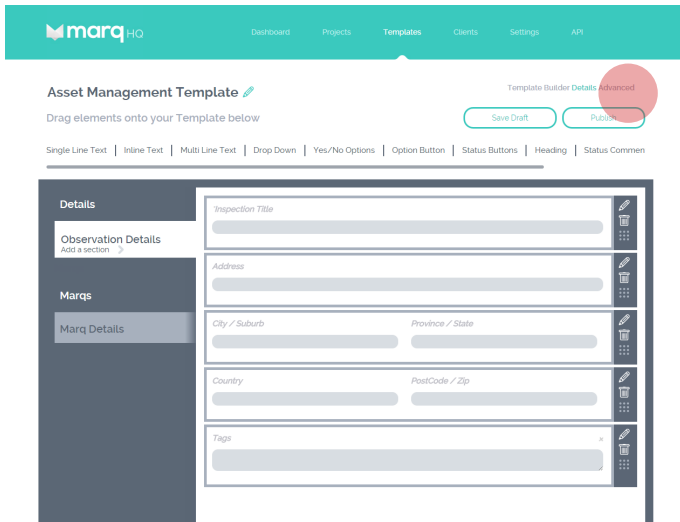
You have the option of saving your template as a draft or publishing the template so that it is available for use.

Saving to draft allows you to save your progress without leaving the editor screen. It is recommended that you save your templates to draft frequently whilst creating your template in order to ensure that there is no data loss.

Publishing your template will make it available for use by allowing you to download the template onto your iPad and use it to conduct observations.

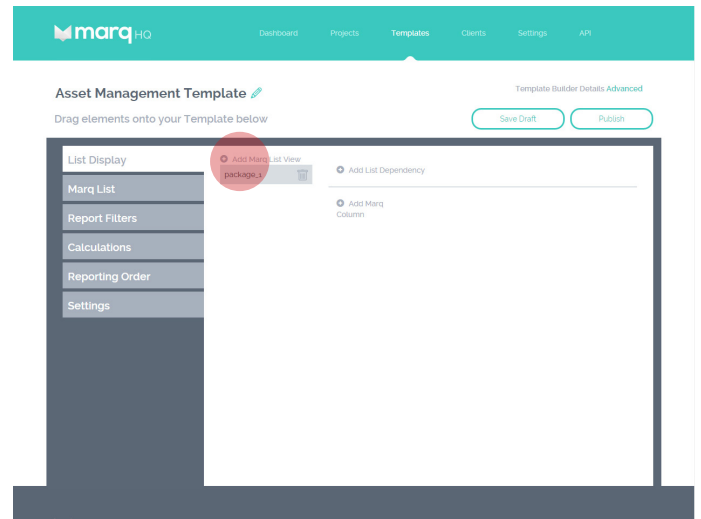
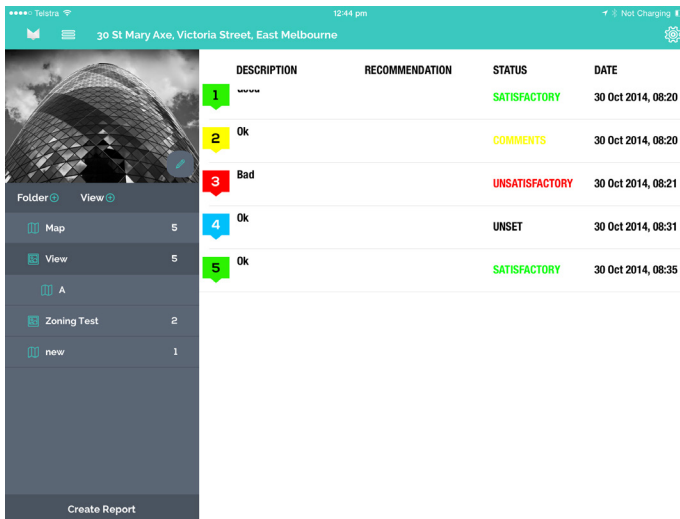
Draft and published versions of templates are recorded to help you track iterative changes. Other information such as when the template was last modified, who it was modified by and who it was originally created by is also available in your list of templates.

9.4 Advanced Template Features



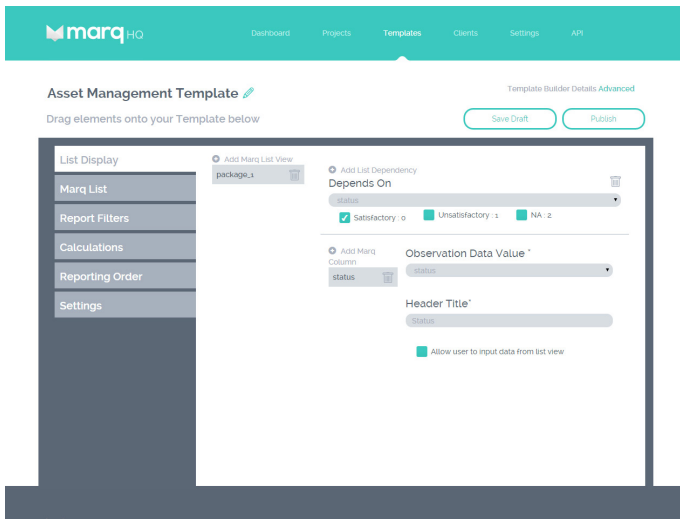
As well as being able to compile and edit elements in the template canvas, the template builder also offers a number of advanced options.

List Display



In the Marq Capture app there are two ways to view Marqs, one is on a View where Marqs are placed in relation to the location of an issue. The second is in a List Display where Marqs are ordered by number and a preview of the Marq data is visible. The List Display Section of the Template Builder allows you to define the Marq data that is visible in that preview.

To add a new list simply select Add Marq List View at the top left of the section.



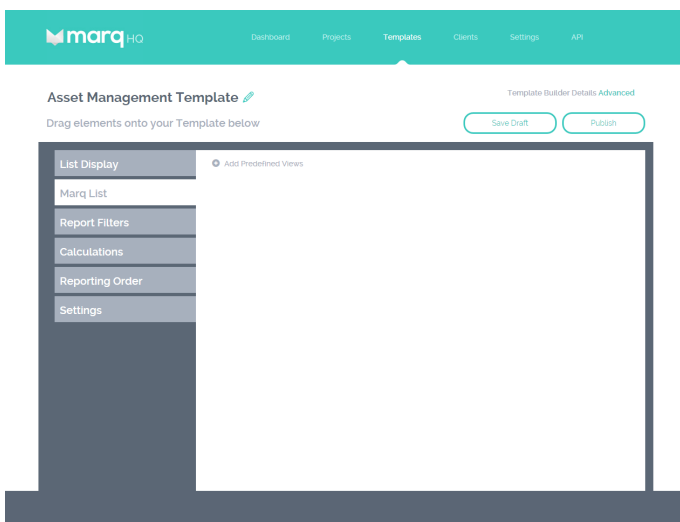
You will first be asked to define the questions your list view is dependent on. This feature allows you to tailor the information visible in the list based on the information a Marq contains.

For example, if you are observing a wall, the information relevant to that wall may depend on whether it is made of brick or concrete therefore the information visible in your list will differ depending on whether you selected brick or concrete.

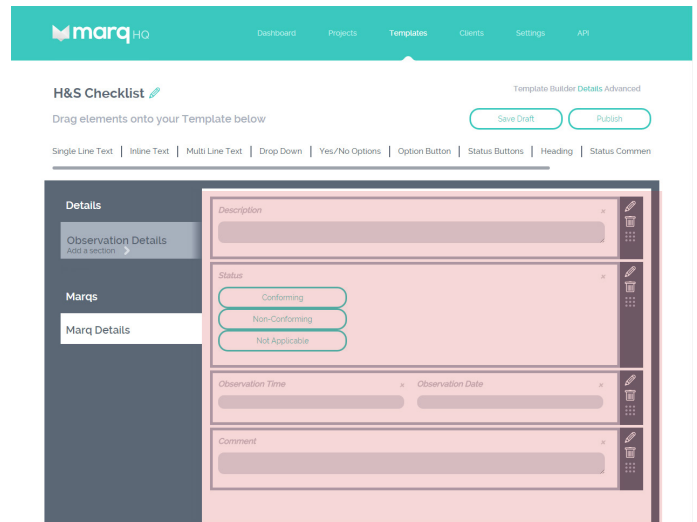
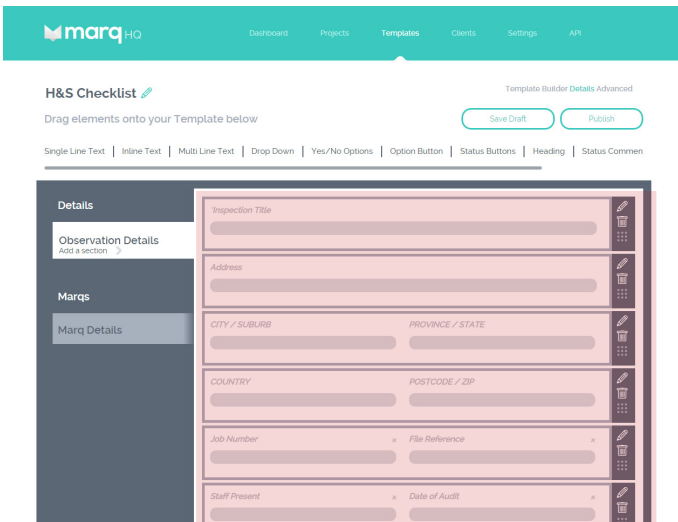
The next step is to choose the information you would like to make visible. Each piece of information will appear in a separate column. You can add as many columns as you like however it is important to consider whether all your columns will fit adequately on the iPad screen. Adding too many may make the information difficult to read.

You can also set the header title that will be displayed above each column.

Marq List

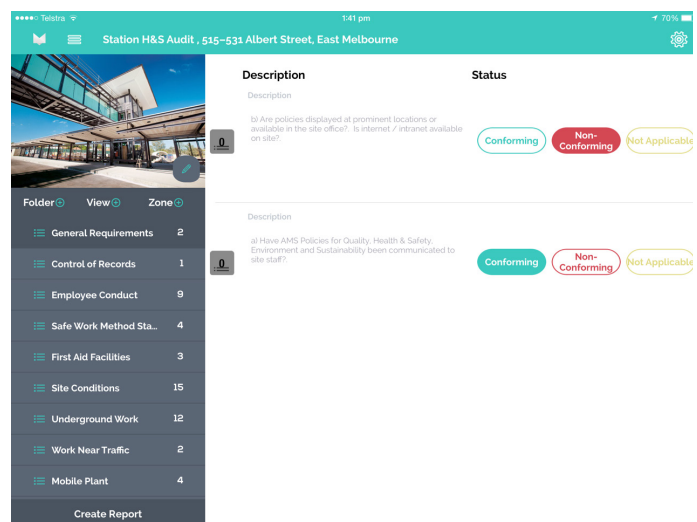
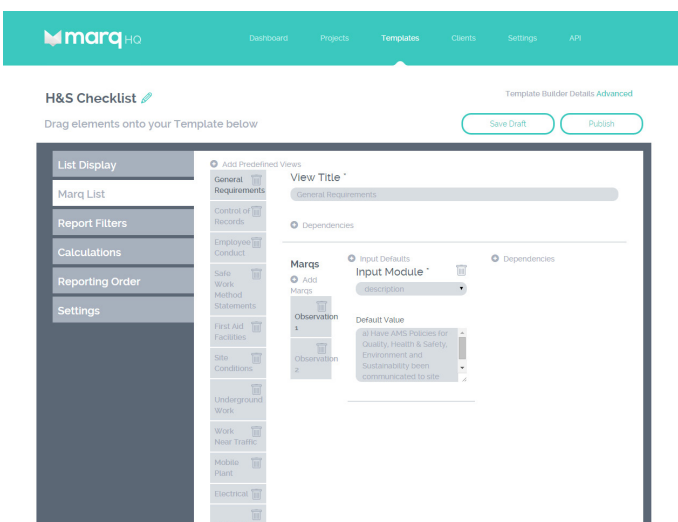


Rather than dropping Marqs onto a background view, the Marq List section allows you to generate your Marqs in a checklist format. The Marq checklists are generated automatically based on the information answered in the Observation Details section of your template. This allows you to automatically generate checklists containing specific Marqs depending on the responses to high level Observation questions.



To develop a Marq List you first need to define the questions you want to include in the template's Observation Details section.

Next you need to enter in all possible Marq questions into the Marq Details section of the template using the available elements.



Then in the Marq List section create a new Predefined View by selecting the Add new button at the top left of the section.

Give the checklist a title and then define the dependencies that need to be met to generate the checklist.

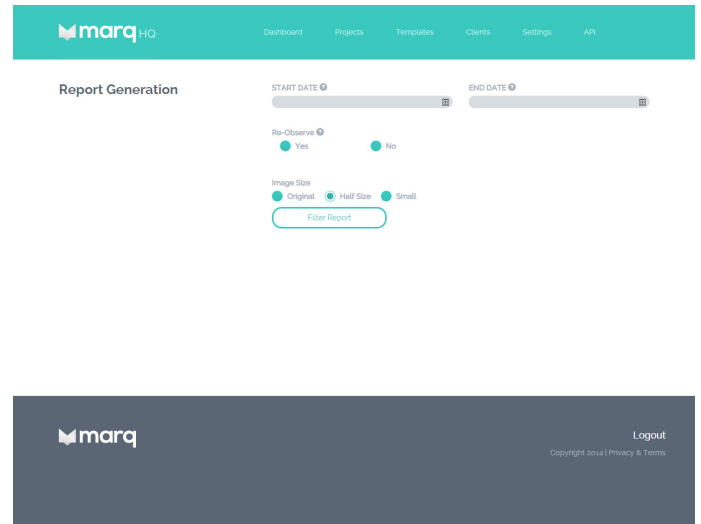
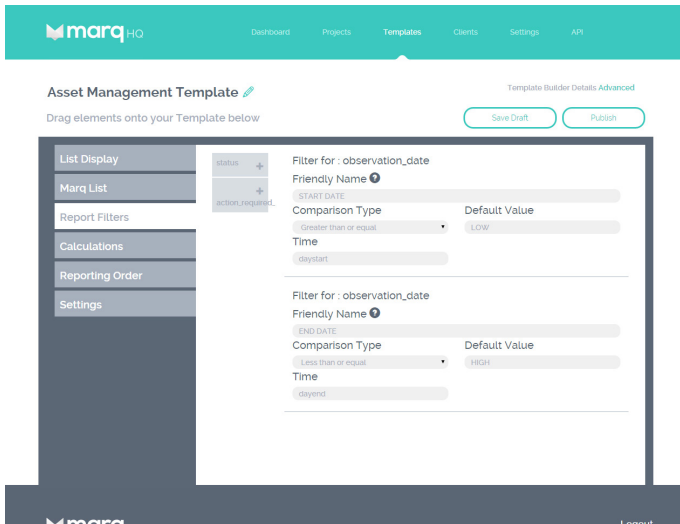
Once the dependencies have been defined it is time to define the individual Marq questions that will appear in the Marq List.

The optional default value field allows you to enter in information that will be automatically present in the answer field. Having prefilled answers allows you to create simple checklists that require the person on site to quickly tick boxes rather than enter text.

You can create as many checklists as you like based on your inspection details.

Remember to create a List Display in order to view your Marq List in the Marq Capture app.

Report Filters



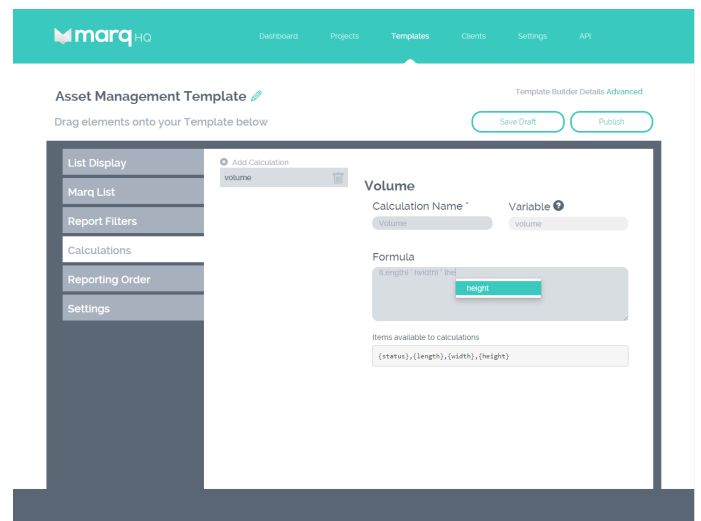
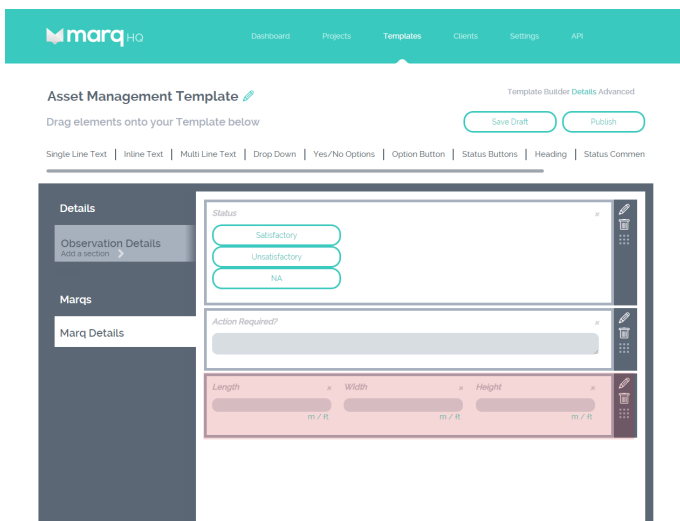
Report filters are used to refine the data that will be visible in your final report. The report filter section allows you to select what filters are made available on Marq HQ and the Marq Capture app when creating a report.

There are a number of default filters that will be present on all templates that relate to filtering Marqs by dates. You will have the option to add additional filters based on the elements you have added to your template.

To add custom filters simply select the data you would like to filter from the left hand column of the Report Filter section. You can then give the filter a name and define how it will filter the data.

You can add as many filters as you like and when creating a report on the iPad or Marq HQ you can apply as many of the filters as you like. You can track the number of Marqs that have been filtered out by comparing the number of refined matches to total Marqs when on the iPad.

Calculations



The Calculations section allows you to create calculations for your report that are based on the data you capture in the field. Calculations are performed automatically when you generate an observation report.

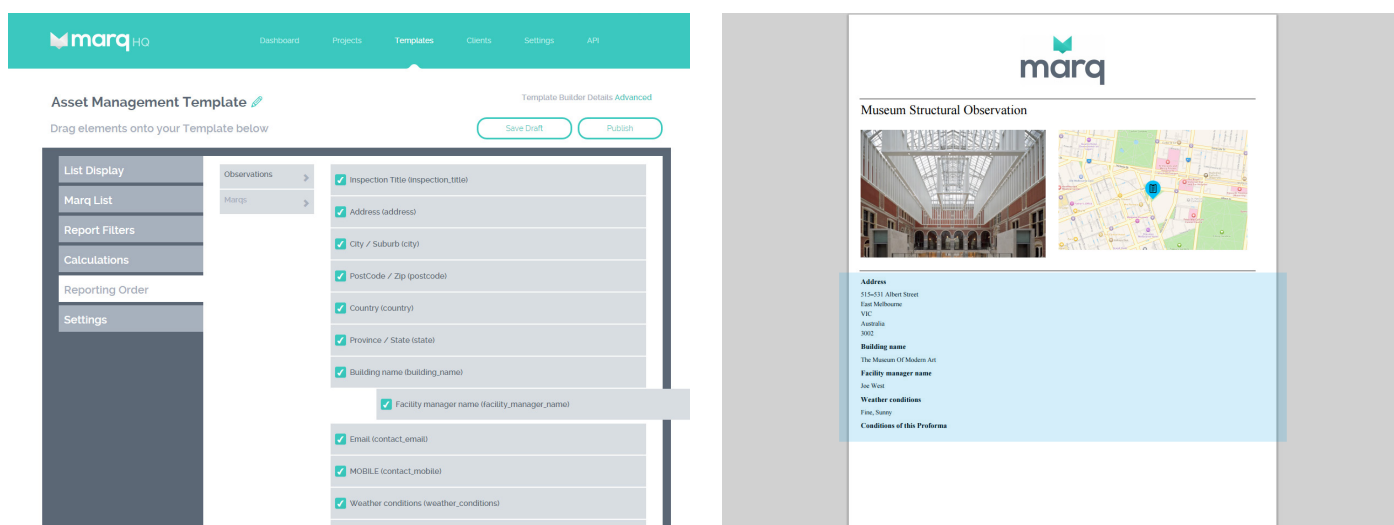
To create a new calculation click the Add Calculation icon at the top left of the section. This will allow you to edit the calculation name and create a new formula. Formulas of the calculations are based on the elements you compiled on the template canvas and only elements that have an associated numeric value can be used in formulas.

To use an element in your formula, type the meta title of the element between curly braces (eg. {element_name}), if you are unsure of the meta title simply begin typing the name of the element and the template manager will provide suggestions.

You can use add, subtract, multiply and divide functions in your formulas. These are expressed in the same way as when using Microsoft Excel. For example, multiply is expressed as "*", divide is expressed as "/", add is expressed as "+" and subtract is expressed as "-".

A list of available elements will also appear at the bottom of the calculations section. For more information about creating decimal or integer based modules please see the element information in section 8.4.

Reporting Order



The screenshot displays the Marq Asset Management Template interface. On the left, a sidebar contains navigation options: List Display, Marq List, Report Filters, Calculations, Reporting Order (highlighted), and Settings. The main area shows the 'Reporting Order' section with a list of elements to be included in the report. Each element has a checkbox to indicate its inclusion. The elements listed are:

- Observations
 - Inspection Title (inspection_title)
 - Address (address)
 - City / Suburb (city)
 - PostCode / Zip (postcode)
 - Country (country)
 - Province / State (state)
 - Building name (building_name)
 - Facility manager name (facility_manager_name)
- Marqs
 - Email (contact_email)
 - MOBILE (contact_mobile)
 - Weather conditions (weather_conditions)

At the top right of the main area, there are 'Save Draft' and 'Publish' buttons. Below the interface, a preview of the final report is shown, titled 'Museum Structural Observation'. The report includes a header with the Marq logo, a main image of a museum interior, and a map. Below the image, the following information is displayed:

Address
515-531 Albert Street
East Melbourne
VIC
Australia
3002

Building name
The Museum Of Modern Art

Facility manager name
Joe Wick

Weather conditions
Fine, Sunny

Conditions of this Preform

The Reporting Order section allows you to edit the data included in your final reports and what order it is presented.

The section is divided into Observations and Marqs. Observation data refers to observation data captured at a high level and that will appear on the front page of your report eg. Observation title, Observation address, contact name etc.

Marq data refers to the data captured in individual Marqs and will appear in the body of the report.

By ticking a box you are choosing to include that information into your final report. If a box is not ticked then the associated information will not be included in your final report.

To edit the order in which data is displayed in the report simply click, hold, drag and drop each line in its appropriate position.



Support

MarqHQ.com
Observeapp.support@arup.com