

Survey task

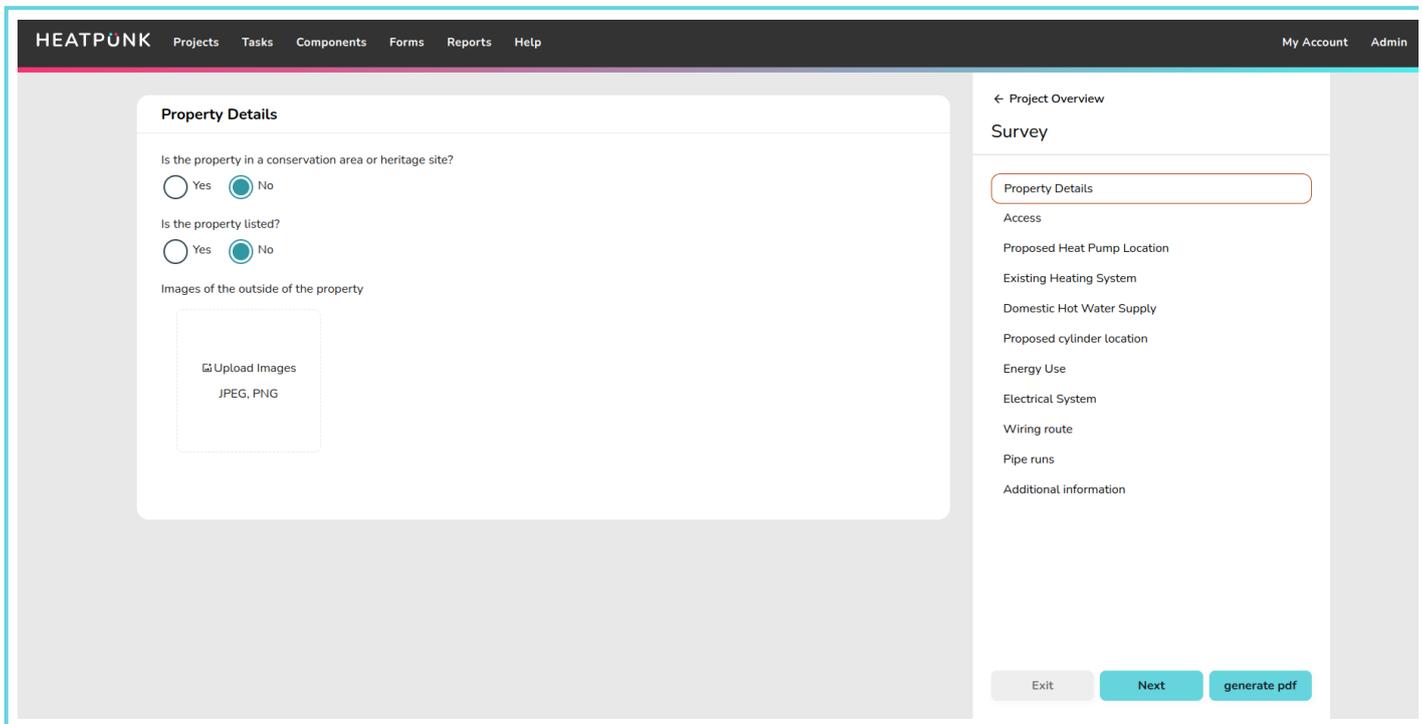
The survey task allows the surveyor to enter all information required to plan out the installation in one location. Surveyors can answer the questions and add additional comments. They can also upload images and apply image annotations. A PDF report of the survey can be generated from the reports drop-down in the main navigation.

Accessing the survey task

From any project, click on the **Tasks** option in the main navigation menu, then select **Surveys**.

Filling out a survey

The survey is divided into sections that can be viewed and navigated between using the right-hand menu.



The screenshot displays the HEATPUNK web application interface for a survey task. The top navigation bar includes 'HEATPUNK' and menu items: 'Projects', 'Tasks', 'Components', 'Forms', 'Reports', and 'Help'. On the right side of the navigation bar are 'My Account' and 'Admin'.

The main content area is divided into two sections:

- Property Details:** This section contains two radio button questions:
 - 'Is the property in a conservation area or heritage site?' with 'Yes' and 'No' options. The 'No' option is selected.
 - 'Is the property listed?' with 'Yes' and 'No' options. The 'No' option is selected.Below these questions is a section for 'Images of the outside of the property' with an 'Upload Images' button and the text 'JPEG, PNG'.
- Survey:** A right-hand navigation menu with a back arrow and 'Project Overview' link. The menu items are: 'Property Details' (highlighted with a red border), 'Access', 'Proposed Heat Pump Location', 'Existing Heating System', 'Domestic Hot Water Supply', 'Proposed cylinder location', 'Energy Use', 'Electrical System', 'Wiring route', 'Pipe runs', and 'Additional information'.

At the bottom right of the interface are three buttons: 'Exit', 'Next', and 'generate pdf'.

Uploading an image

Access

Description of parking arrangements

Images showing parking arrangements



There are various locations throughout the survey where pictures can be uploaded and annotated. **Click on the Upload Images box** and it will bring up the option to upload a picture from your files. If you are on a mobile or tablet device it will give you the option to take a photo. You can repeat this step to add multiple images.

Adding annotations to your images

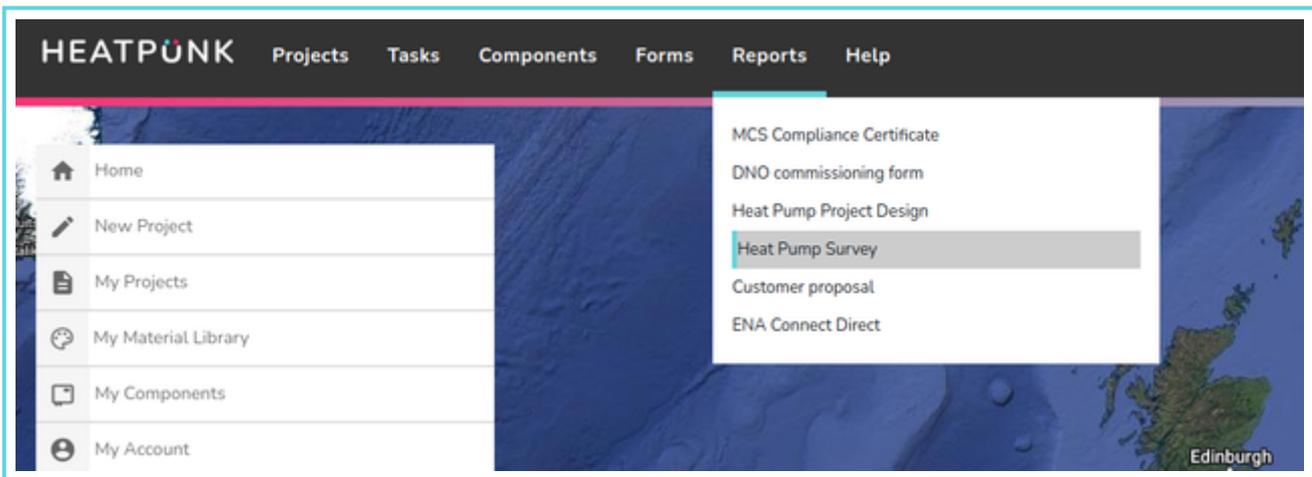
Once the file has been uploaded, you can **click on the picture to bring up the annotation options**.

- Use the *bin* button to delete annotations or the whole image.
- The *cursor* lets you select annotations you have added to the image.
- The *pencil* allows you to draw or write free-form.
- The '*T*' is used to create a text box.
- The *arrow* lets you draw an arrow.
- The *colour box* is where you can change the colour of annotations.
- The *tick mark* saves your annotations and exits the annotations editor.

The green bar at the left indicates which tool you are currently using.



Accessing your survey as a PDF report



After the survey is complete, the report can be found in the 'Reports' drop-down. Annotated images, question responses, and an image of the roof layout will be carried forward to the survey report.

Note that heic files (usually from mobile devices) are not supported at this time. If your phone, tablet, or camera is set to save pictures in this file format, please change this to save .jpg files in settings.

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