

Aproplan User Guide

Web & Mobile



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Support

Get in touch with the Aproplan Team

Getting started with Aproplan

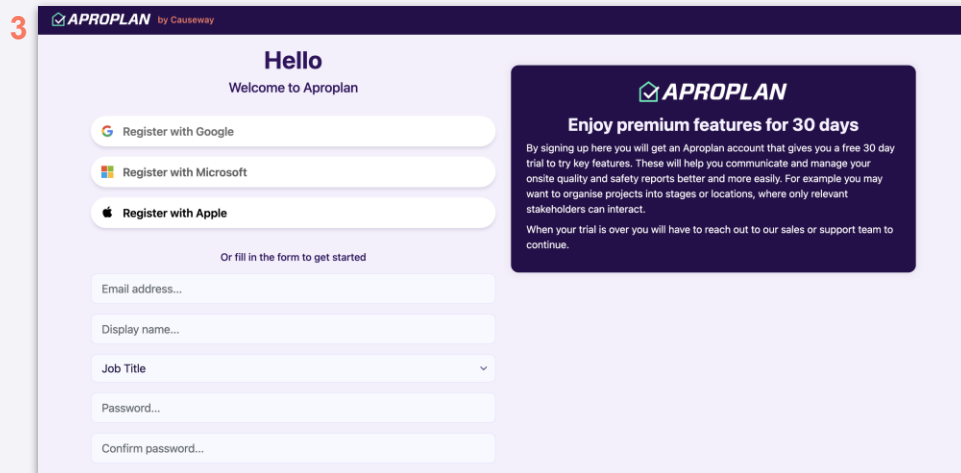
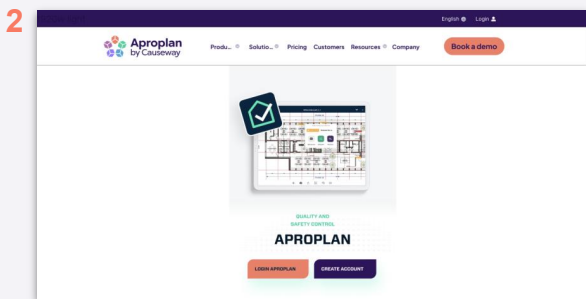
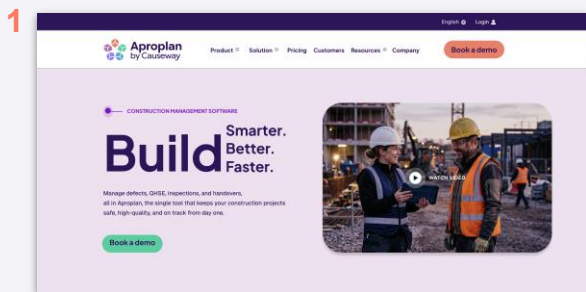
1. Create your account
2. Log in to Aproplan
3. Projects page
4. User settings



I. Getting started with Aproplan

1. Create your account on <https://www.aproplan.com/login> by clicking on **CREATE ACCOUNT**

A confirmation email will be sent to your email address. Once your account is activated, you can log in.

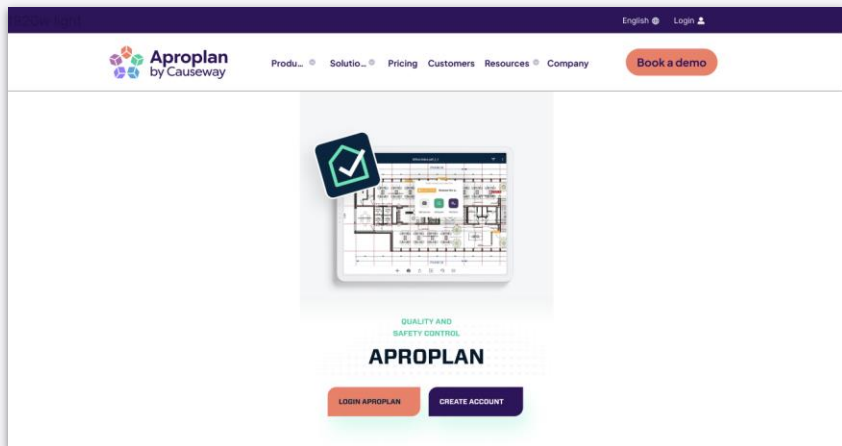


I. Getting started with Aproplan

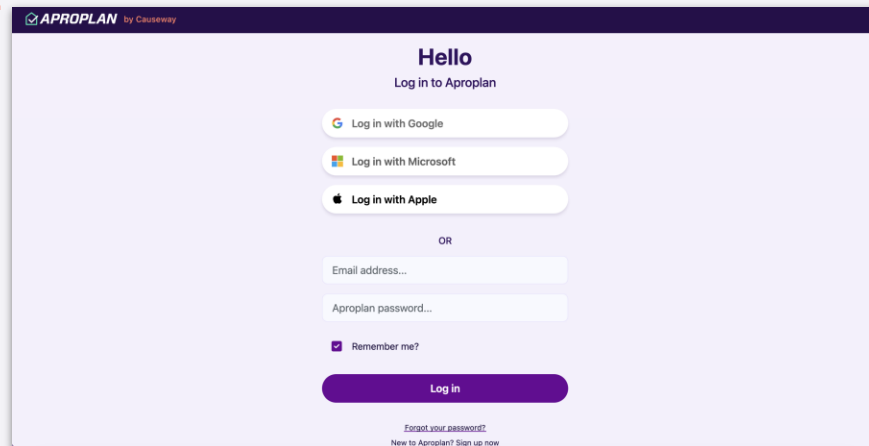
2. Log in on Aproplan

Go to www.aproplan.com/login (1) or <https://www.app.aproplan.com> (2) and click on « Login ».

1



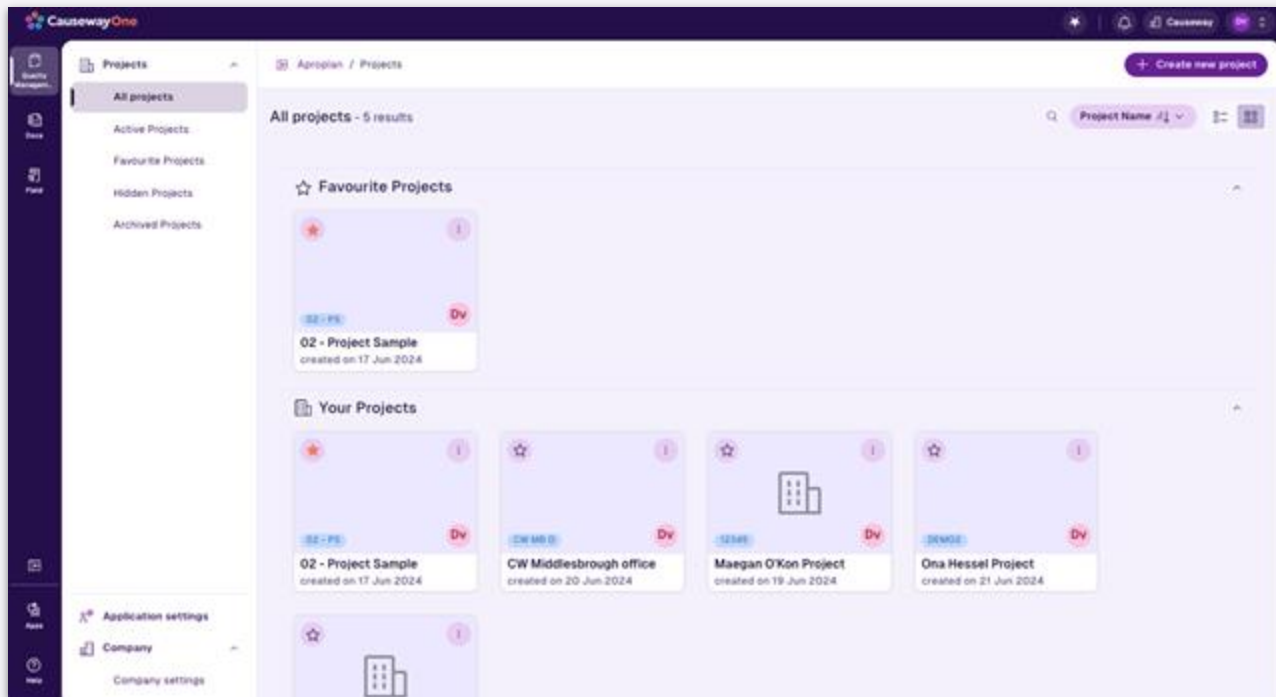
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I. Getting started with Aproplan

3. Projects page

The Project Overview page in Aproplan gives you a centralised view of your projects. You can create, edit, copy projects, and remove or archive them. Easily switch between tile view and list view, and access key project details in one place.



For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/14936789-aproplan-understanding-the-project-overview-v1-v2-web-version>

I. Getting started with Aproplan

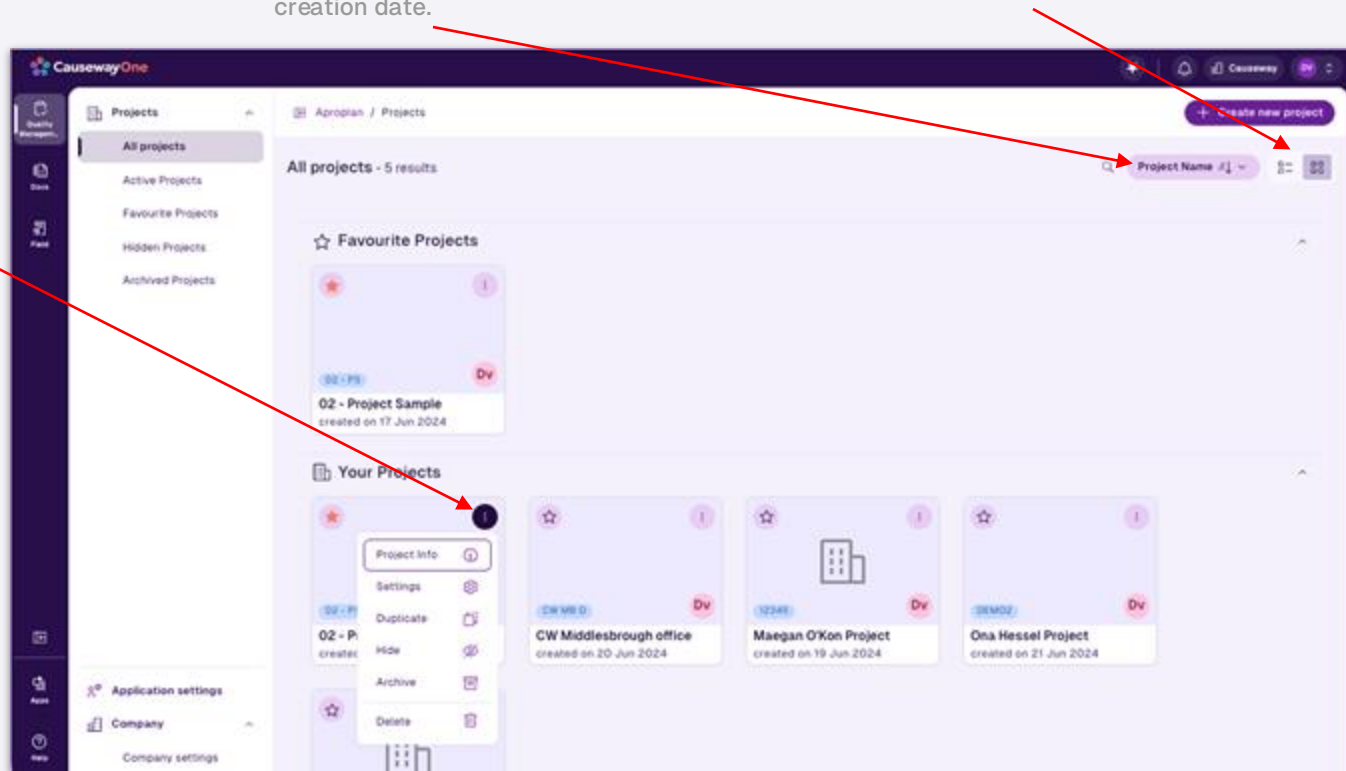
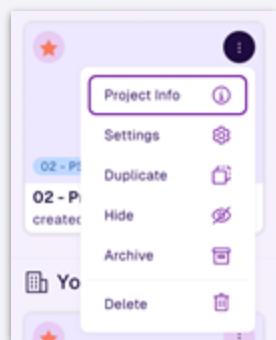
3. Projects page

From the **Projects** page, you can quickly access key project information and manage your projects efficiently.

By clicking the action menu on a project thumbnail, you can access additional project options. From here, you can show project info, open project settings, duplicate the project, hide it from the overview or completely hide it, archive the project, or delete it.

You can sort the Projects Overview in ascending or descending order and filter it by project name, start date or due date, and creation date.

The overview can be displayed in either tile view or list view, allowing you to choose the layout that best fits your way of working.



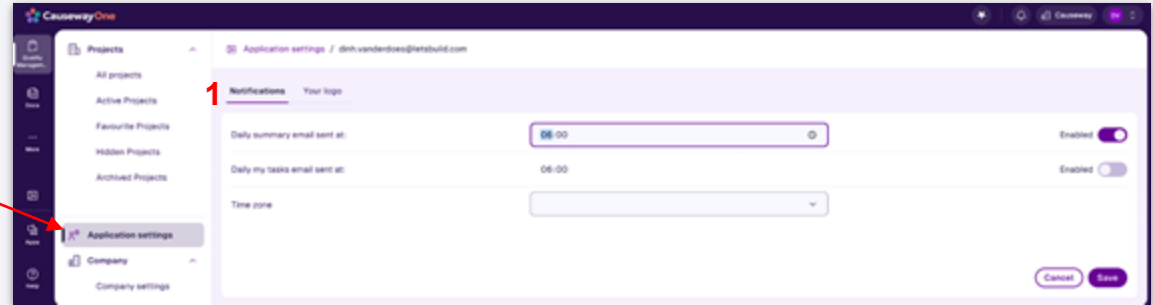
I. Getting started with Aproplan

4. User settings

On the Application Settings screen, you will find the **Notifications** and **Your Logo** tabs.

In the **Notifications** tab (1), you can configure your daily email notifications for activities and tasks. These emails provide an overview of the latest activities performed by your colleagues, as well as any tasks assigned to you. To receive these notifications, set the desired notification time and activate each option by toggling the sliders to purple.

In the **Your Logo** (2) tab, you can upload a company logo. This logo can be displayed on PDF reports generated from the platform. Logos must be in .jpg or .png format and must not exceed 2 MB in size.



Don't forget to **save**.

II. Administrator (web)

1. Create your project
2. Spaces
3. Documents
4. Participants & Access rights
5. Company

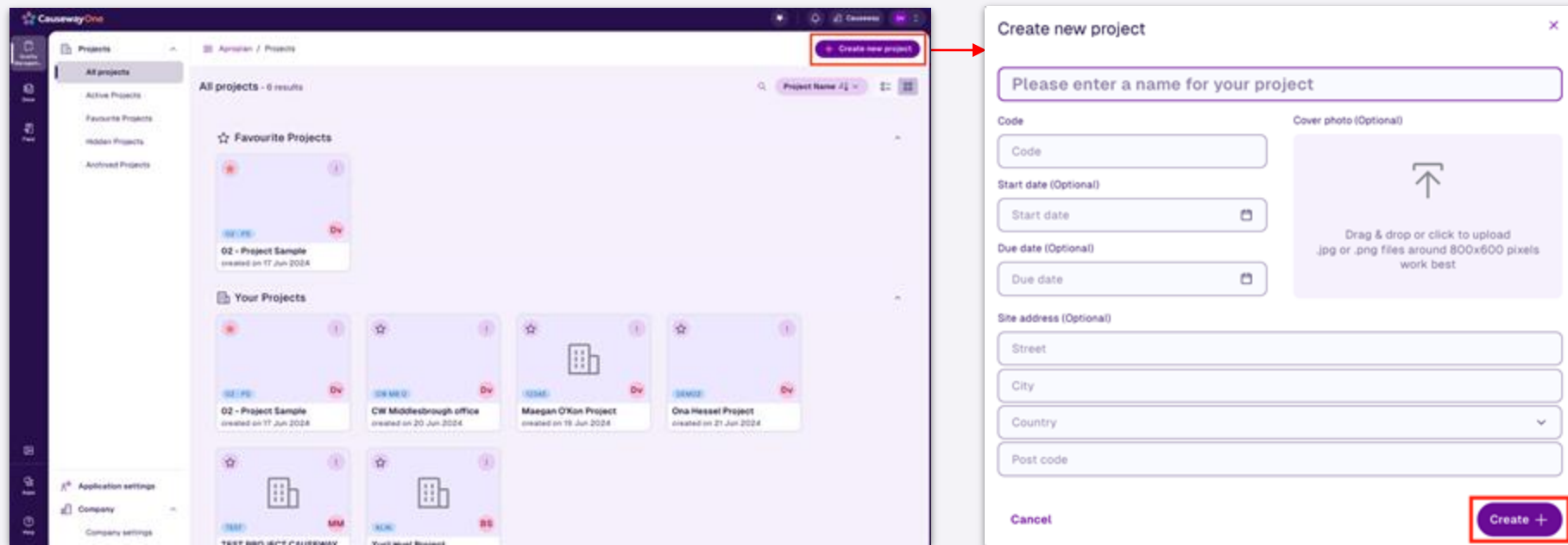
II. Administrator (web)

1. Create your project
 - a. Project details
 - b. Project settings
 - c. Categories
 - d. Rooms (Locations)
 - e. Statuses
 - f. Custom fields

II. Administrator (web)

1.a. Project details

To create your new project, click on the **Create new project** button in the top-right corner. A new window will pop up where you can fill in the project details such as the name of the project, start and end date, site address and upload a cover photo:



The image shows the 'Create new project' modal in the Aproplan web interface. The modal is titled 'Create new project' and has a close button (X) in the top right corner. It contains the following fields and options:

- Please enter a name for your project**: A text input field.
- Code**: A text input field.
- Start date (Optional)**: A date picker field.
- Due date (Optional)**: A date picker field.
- Site address (Optional)**: A text input field.
- Street**: A text input field.
- City**: A text input field.
- Country**: A dropdown menu.
- Post code**: A text input field.
- Cover photo (Optional)**: A section with a large upward arrow icon and the text 'Drag & drop or click to upload .jpg or .png files around 800x600 pixels work best'.
- Create +**: A button at the bottom right, highlighted with a red box.
- Cancel**: A button at the bottom left.

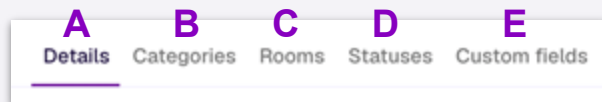
An arrow points from the 'Create new project' button in the top-right corner of the main interface to the modal.

II. Administrator (web)

1.b. Project settings

With the project created, the first page you see is the project Settings page. The settings are divided into 5 tabs.

The project settings are divided into 5 tabs:



A. DETAILS

Here you can find the main details of the project, as defined when the project was created. These details can be edited in the project **Details** tab.

B. CATEGORIES

Define a custom category structure: This helps you organise, filter, and print your points more efficiently. You can personalise and edit the structure to fit your project needs by defining categories, subcategories, and subjects.

C. ROOMS

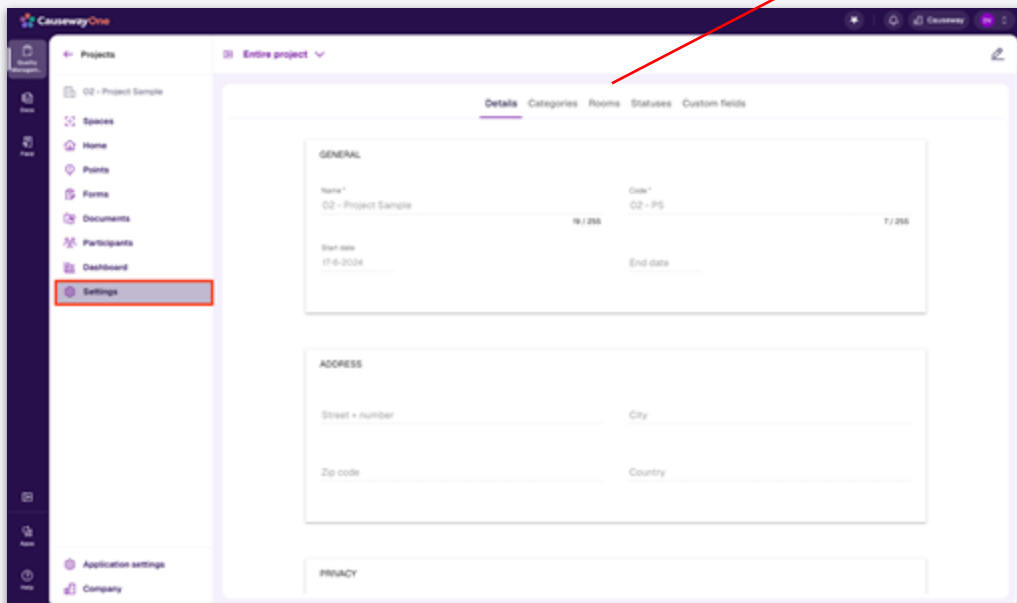
Define a custom room structure: You can organise your data by creating a two-level room structure to better classify and manage information.

D. STATUSES

Customise your status: Point status helps you track the progress of your points. You can edit the name and colour, choose whether to activate it, and decide if it should be accessible only to Space managers.

E. CUSTOM FIELDS

The Custom Fields tab in Aproplan lets you create additional fields to capture specific information on your points. You can define the field name, choose a field type (such as a drop-down menu), and set the available options. Once created, these fields will appear in the point details for structured data entry.



For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4298890-aproplan-how-to-create-a-project-in-aproplan-web-version>

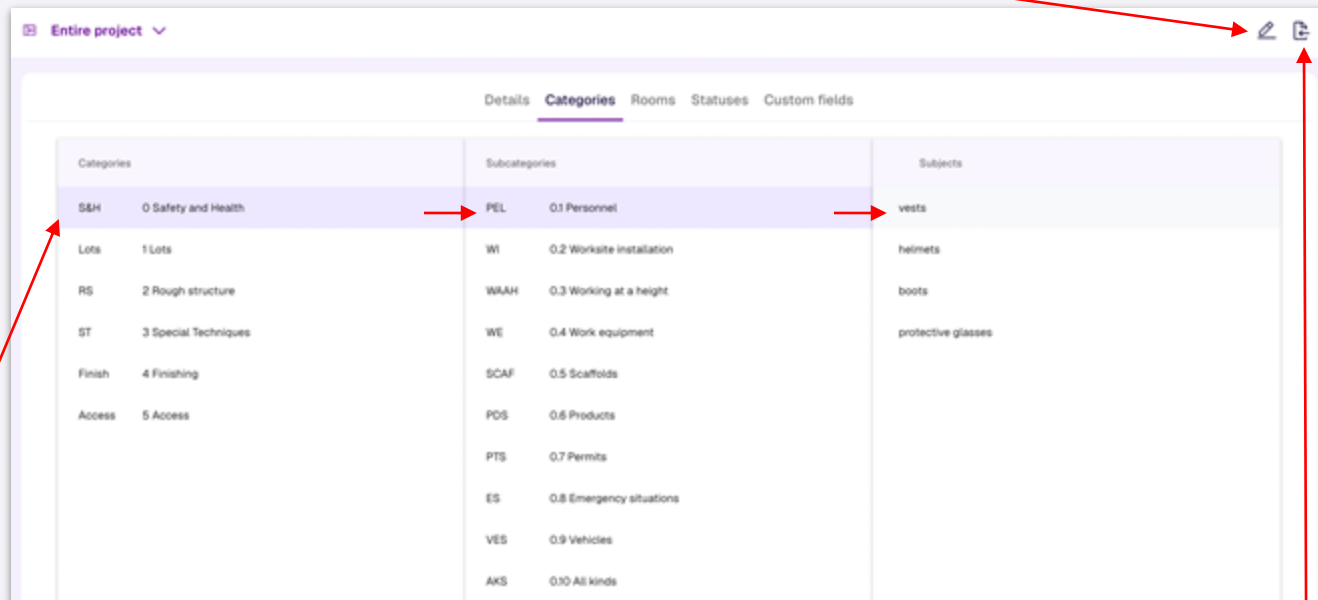
II. Administrator (web)

1.c. Categories

Categories can be used to organise your points in a clear and structured way. For example, you can create a category like **Safety and health**, add a subcategory such as **Personnel**, and then define subjects like **vests**. This structure helps you easily classify and track issues within your project.

The categories, subcategories, and subjects are displayed in three columns. Selecting a category in the left column shows its subcategories in the middle column, and selecting a subcategory displays its subjects in the right column.

You can add new categories or edit existing ones by clicking on the pencil in the top-right corner.



Entire project ▾			Details Categories Rooms Statuses Custom fields		
Categories		Subcategories		Subjects	
S&H	0 Safety and Health	→ PEL	0.1 Personnel	→ vests	
Lots	1 Lots	WI	0.2 Worksite installation	helmets	
RS	2 Rough structure	WIAH	0.3 Working at a height	boots	
ST	3 Special Techniques	WE	0.4 Work equipment	protective glasses	
Finish	4 Finishing	SCAF	0.5 Scaffolds		
Access	5 Access	PGS	0.6 Products		
		PTS	0.7 Permits		
		ES	0.8 Emergency situations		
		VES	0.9 Vehicles		
		AKS	0.10 All kinds		

You can also import an existing structure from another project or upload a list from an Excel file. This allows you to quickly reuse or set up a predefined category structure without manual creation. By clicking the up/down arrows in the top-right corner, you can choose to import from Excel or import a category structure from another project, then follow the steps to apply it to your project.

For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255945-aproplan-how-to-define-the-categories-subcategories-subjects-and-descriptions-web-version>

II. Administrator (web)

II.1.d. Rooms (Locations)

Rooms (locations) are used to structure your project by physical spaces. You can create a two-level hierarchy with Rooms level 1 and Rooms level 2 to clearly define locations within your project, making it easier to filter, track, and manage points per area.

The Rooms are displayed in two columns: selecting a Rooms level 1 location shows the corresponding Rooms level 2 locations in the column on the right.

Click on the pencil (1) to add or edit existing rooms according to your project structure. You can also import a Rooms structure from another project or from an Excel file by clicking the import icon (2), using the same import option as for categories.

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Entire project

DetailsCategoriesRoomsStatusesCustom fields

Rooms level 1		Rooms level 2	
B1	Building	R1	Room 1
		R2	Room 2
		R3	Room 3
		Living	Living
		Hall	Hall
		BathR	Bathroom
		Toilet	Toilet
		Toilet 2	Toilet 2
		UtilityR	Utility Room
		Kitchen	Kitchen

For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255935-aproplan-how-to-define-rooms-web-version>

II. Administrator (web)

1.e. Statuses

After creating your project, a standard list of 13 statuses is available to track the progress of your points. This list can be fully customised to suit your needs; you can add as many statuses as required.

You can also change the colour of each status by clicking on it (1), which will be reflected in the colour of the point pins on a plan. Unused statuses can be deactivated in the Active column.

By clicking **Edit** (2) in the top right corner, you can rename statuses, activate or deactivate them, and reorganise them using drag and drop. With the **Import** (3) button you can import statuses from another project.

Name	Active	Manager	Subcontractor status	Closing
1  In progress	☒		To do	
 Planned			To do	
 Done	☒		Done	☒
 Checked	☒		Done	
 Closed	☒		Done	
 Cancelled			Done	
 Impossible to repair			Invisible	
 Refused			Done	
 In observation			To do	
 For information			To do	
 Risk low			To do	
 Risk moderate			To do	
 Risk high			To do	

II. Administrator (web)

1.e. Statuses

A B C D E				
Name	Active 	Manager 	Subcontractor status 	Closing 
 In progress			To do	
 Planned			To do	
 Done			Done	
 Checked			Done	
 Closed			Done	
 Cancelled			Done	
 Impossible to repair			Invisible	
 Refused			Done	
 In observation			To do	
 For information			To do	
 Risk low			To do	
 Risk moderate			To do	
 Risk high			To do	

The list of statuses is divided into five columns:

A. NAME

The Name column shows the status names, which can be edited to your preference.

B. ACTIVE

The Active column shows which statuses are marked as active with a checkmark. Inactive statuses are invisible to participants.

C. MANAGER

In the Manager column, you can mark a status as visible only to Managers and Administrators. These statuses will not be visible to Contributors and Guests.

D. SUBCONTRACTOR STATUS

This column shows the status that Subcontractors will see. These correspond to the active statuses visible to Guests, Contributors, Managers, and Administrators.

E. CLOSING

Here you can mark specific statuses that allow Subcontractors to close a point. Statuses not selected in the Closing column cannot be closed by a Subcontractor.

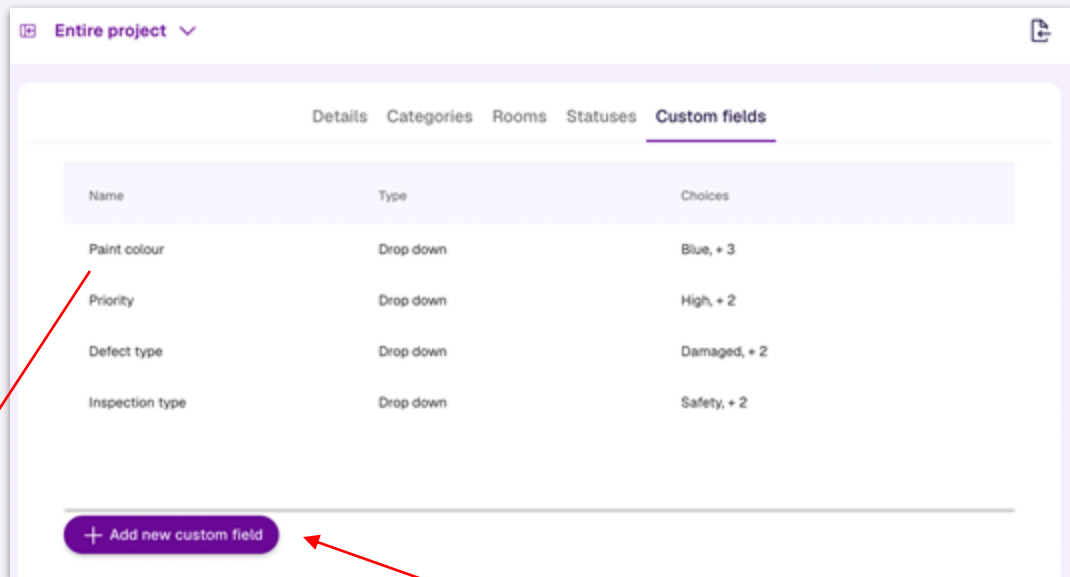
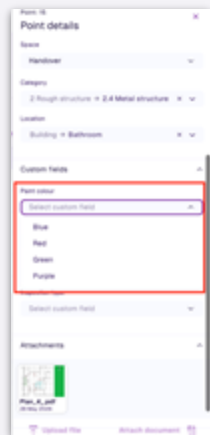
For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255918-aproplan-how-to-define-the-points-statuses-web-version>

II. Administrator (web)

1.f. Custom fields

Custom Fields are flexible metadata that can be added to points to better structure and classify your project information. You can create multiple custom fields based on your company's needs, and they will automatically become available when creating or editing a point across the project.

Custom Fields can also be used as filters, allowing you to quickly sort and analyse points based on one or multiple field values, such as priority, phase, or responsible party.



To create a custom field, click the button to add a new field in the Custom Fields tab. From there, define the field name, choose the field type (currently only dropdown is available), and set the available values (up to 14 options per field). A maximum of 20 active custom fields can be used per project.

Once created, custom fields are visible on the point creation and point detail screens in both the web and mobile applications. They can also be edited or removed at any time from the settings.

II. Administrator (web)

2. Spaces

- a. Spaces section
- b. Public Space / Private Space
- c. Custom Spaces
- d. Custom Space settings
- e. Import Spaces via excel

II. Administrator (web)

2.a. Spaces section

Spaces are communication groups that allow you to manage and centralise communication, documents, tasks, and inspection forms. They help you organise and group points, forms, documents, and participants (including their access rights) in one place.

The screenshot displays the CausewayOne web interface. On the left is a dark sidebar with navigation icons for 'Quality Management', 'New', 'Form', 'Dashboard', and 'Tools'. The main content area is titled 'Select a space' and shows details for the '02 - Project Sample' space, including its ID (ID2 - PSI), creation date (17-6-2024), and owner (Dinh van der Does). A table lists various items within this space, each with a unique code, title, creation date, author, and counts for points, documents, and participants. A sidebar on the left of the main content area lists navigation options: 'Spaces', 'Home', 'Points', 'Forms', 'Documents', 'Participants', 'Dashboard', and 'Settings'. At the bottom of this sidebar are 'Application settings' and 'Company' links. A '+ Open entire project' button is located in the top right of the space details section.

Code	Title	Created	Author	Points	Documents	Participants
3rd	3rd party visits	25-1-2018	Dinh van der Does	1	1	1
3w	3-week planning	25-1-2018	Dinh van der Does	2	1	3
DV	Daily Visit	25-1-2018	Dinh van der Does	3	1	3
HA	Handover	25-1-2018	Dinh van der Does	3	1	5
I	Internal todo	25-1-2018	Dinh van der Does	2	1	3
PSI	Private list of ID2 - PSI ID2 - Project Sample	17-6-2024	Dinh van der Does	0		
PSD	Public list of ID2 - PSI ID2 - Project Sample	17-6-2024	Dinh van der Does	0		
QCP	Quality control plan	25-1-2018	Dinh van der Does	9	1	8
SD	Site diary	25-1-2018	Dinh van der Does	1	1	4
TB	Toolbox	25-1-2018	Dinh van der Does	0	1	3
VCA	VCA security	25-1-2018	Dinh van der Does	1	1	4

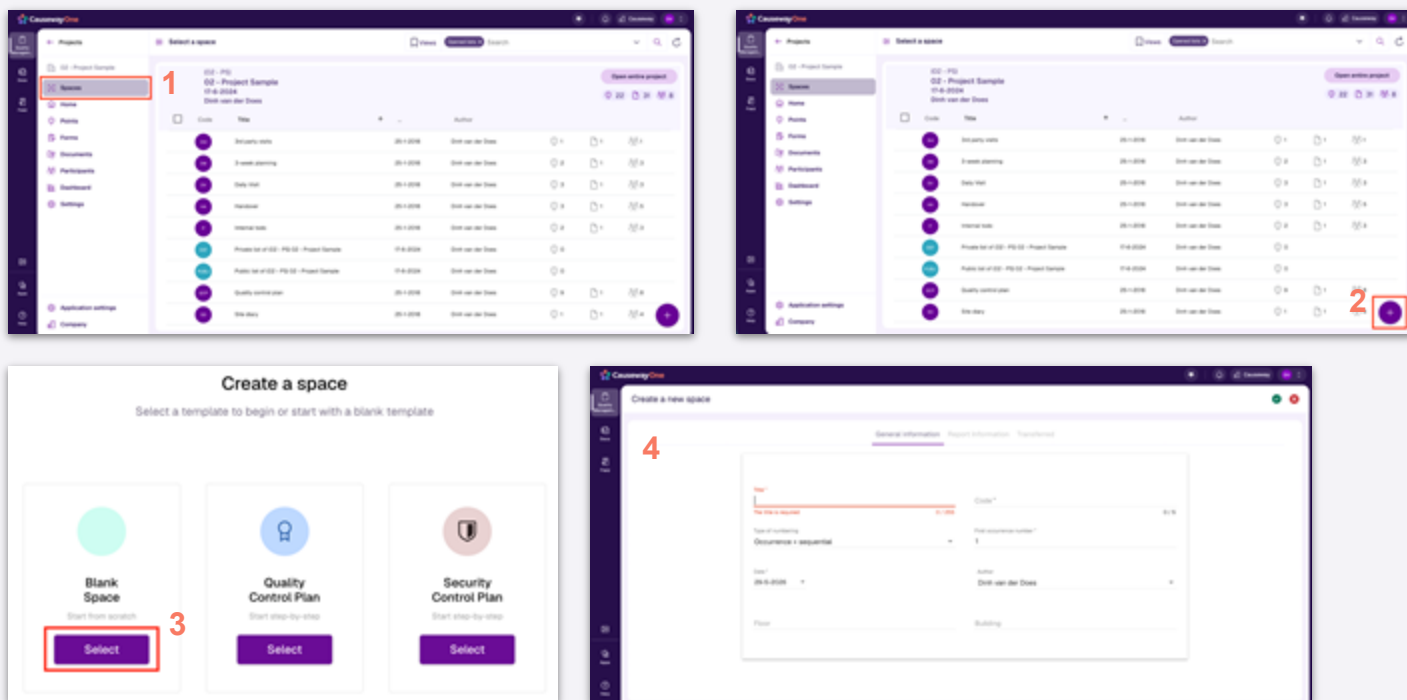
For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255037-aproplan-different-list-types-overview-web-version?q=reports>

II. Administrator (web)

2.a. Spaces section

To create a Space, access the **Spaces** section in the navigation panel on the left side (1). Click the purple plus “+” button in the bottom-right corner (2). A new screen will open (3), where you can choose between three Space types: a blank Space, a Quality Control Plan, or a Security Control Plan.

The two predefined options (Quality Control Plan and Security Control Plan) guide you step by step in creating a communication group dedicated to form control within the application.



Here is an overview of the general information fields screenshot (4):

Title: Enter the title of the Space.

Type of numbering: Choose how future points will be numbered.

Date: By default, the Space creation date is used, but it can be updated.

Floor: Free text field used to specify the floor or level.

Code: By default, the first four letters of the Space title are used, but this can be edited.

First occurrence number: Select the starting occurrence number for future points.

Author: By default, the creator's name is used, but it can be changed to another project participant.

Building: Free text field used to specify the building name or reference.

For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4258621-aproplan-how-to-create-and-edit-a-blank-list-web-version>

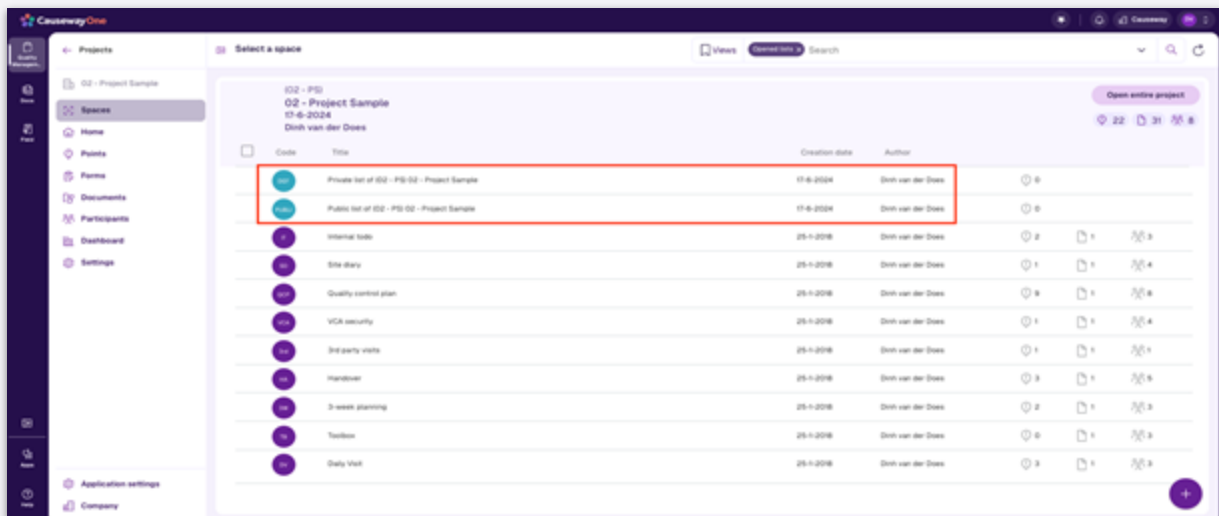
II. Administrator (web)

2.b. Public Space / Private Space

Public and **Private Spaces** define who can see and access the information within a space. The names of these spaces cannot be edited, and they cannot be deleted.

A **Public Space** is like a shared workspace where everyone in the project can view and collaborate on its content.

The **Private Space** on the other hand is like a personal list where only you can see and manage its content, allowing you to centralise and manage your own points, forms, and documents privately.



Code	Title	Creation date	Author
I02 - PS0	Private list of I02 - PS0 - Project Sample	17-6-2024	Dinh van der Does
I02 - PS0	Public list of I02 - PS0 - Project Sample	17-6-2024	Dinh van der Does
I02 - PS0	Internal todo	25-1-2018	Dinh van der Does
I02 - PS0	Site diary	25-1-2018	Dinh van der Does
I02 - PS0	Quality control plan	25-1-2018	Dinh van der Does
I02 - PS0	VCR security	25-1-2018	Dinh van der Does
I02 - PS0	3rd party visits	25-1-2018	Dinh van der Does
I02 - PS0	Handover	25-1-2018	Dinh van der Does
I02 - PS0	3-week planning	25-1-2018	Dinh van der Does
I02 - PS0	Toolbox	25-1-2018	Dinh van der Does
I02 - PS0	Daily Visit	25-1-2018	Dinh van der Does

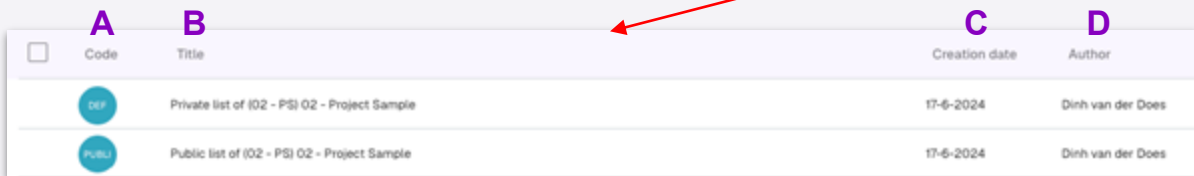
The Spaces overview is divided into five columns:

A. Code: Displays the unique identifier of each Space for reference.

B. Title: Shows the name of the space.

C. Creation date: Shows when the space was created.

D. Created by: Displays the user who created the space.



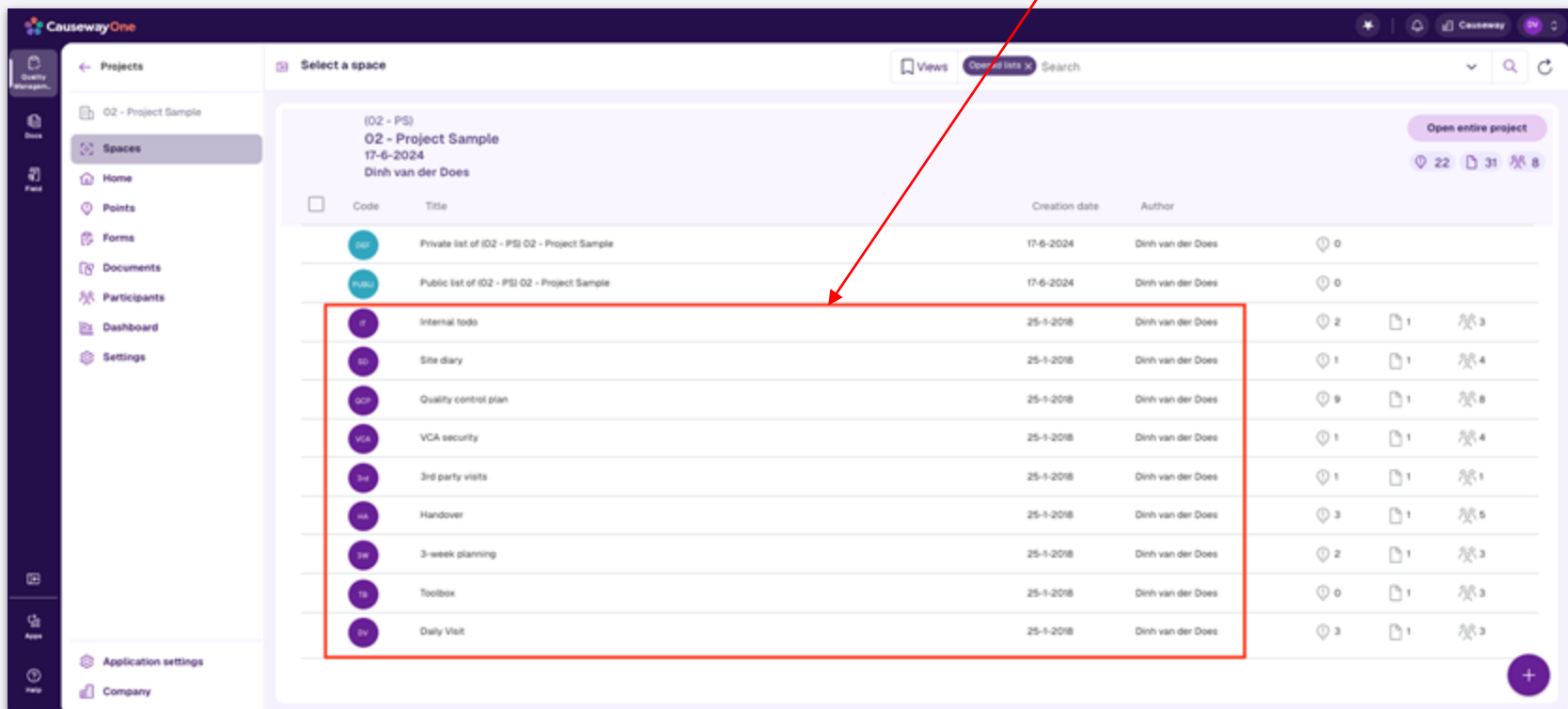
A	B	C	D
Code	Title	Creation date	Author
I02 - PS0	Private list of I02 - PS0 - Project Sample	17-6-2024	Dinh van der Does
I02 - PS0	Public list of I02 - PS0 - Project Sample	17-6-2024	Dinh van der Does

For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255037-aproplan-different-list-types-overview-web-version?q=reports>

II. Administrator (web)

2.c. Custom Spaces

Custom Spaces in Aproplan are spaces that participants can create within a project to organise information into specific groups based on their needs. They help you manage and structure points, forms, documents, and participants more efficiently.



The screenshot displays the 'Select a space' interface in the CausewayOne web application. The left sidebar shows navigation options: Projects, Spaces (selected), Home, Points, Forms, Documents, Participants, Dashboard, and Settings. The main content area shows a list of spaces for the project '02 - Project Sample' (ID: 02 - PSI, created 17-6-2024 by Dinh van der Does). The list includes a table of custom spaces, with a red box highlighting a selection of spaces and a red arrow pointing to it from the text above.

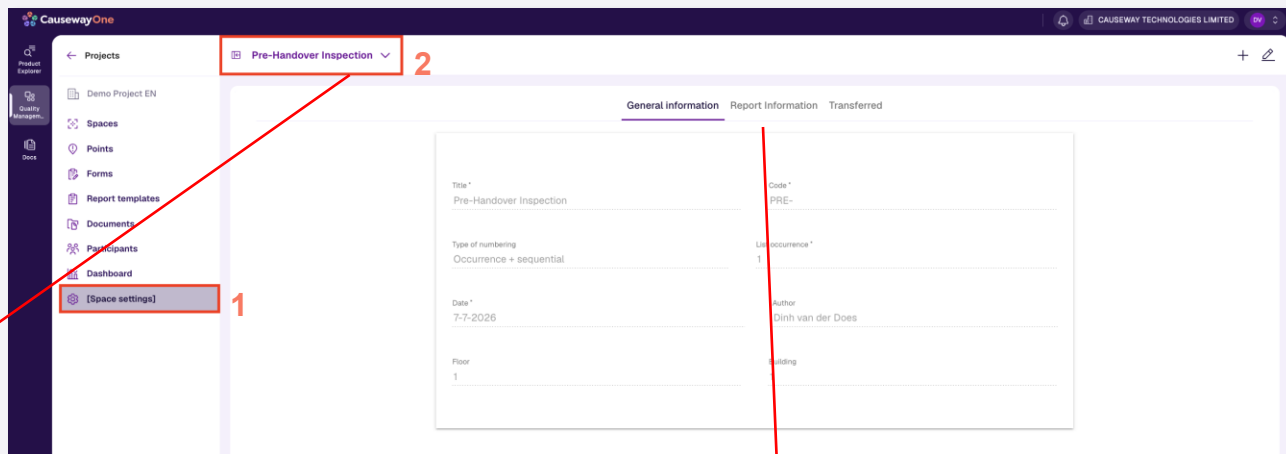
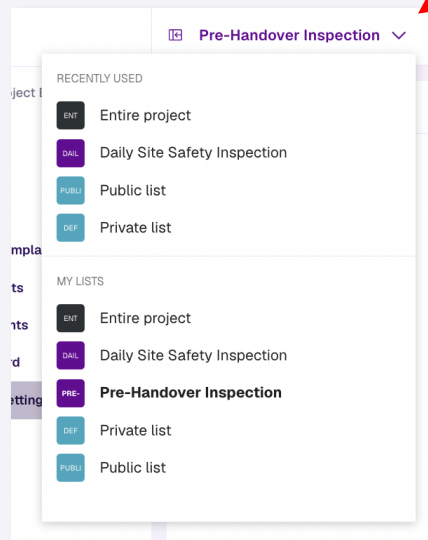
Code	Title	Creation date	Author	Lock	Icon	Participants
PSI	Private list of (02 - PSI) 02 - Project Sample	17-6-2024	Dinh van der Does	0		
PUB	Public list of (02 - PSI) 02 - Project Sample	17-6-2024	Dinh van der Does	0		
IT	Internal todo	25-5-2018	Dinh van der Does	2	1	3
SD	Site diary	25-5-2018	Dinh van der Does	1	1	4
QCP	Quality control plan	25-5-2018	Dinh van der Does	9	1	8
VCA	VCA security	25-5-2018	Dinh van der Does	1	1	4
3P	3rd party visits	25-5-2018	Dinh van der Does	1	1	1
HA	Handover	25-5-2018	Dinh van der Does	3	1	5
3W	3-week planning	25-5-2018	Dinh van der Does	2	1	3
TO	Toolbox	25-5-2018	Dinh van der Does	0	1	3
DV	Daily Visit	25-5-2018	Dinh van der Does	3	1	3

For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255037-aproplan-different-list-types-overview-web-version?q=reports>

II. Administrator (web)

2.d. Custom Space settings

To access the **Space** settings, click **Settings (1)** in the navigation panel on the left. Then click the **Spaces** menu in the top-left corner and select the desired space from the drop-down menu (2):



General information Report Information Transferred

The Spaces settings are divided into three tabs:

- **General Information:** You can edit the Space name, select the numbering type which determines how points are numbered within the Space (project sequential, occurrence + sequential, code + sequential, or code + occurrence + sequential), and update details such as the date, Space code, author, floor, and building.
- **Report Information:** You can customise the header, footer, and additional information that will appear in reports generated from the Space.
- **Transferred:** Provides an overview of officially approved documents that have been transferred to participants.

II. Administrator (web)

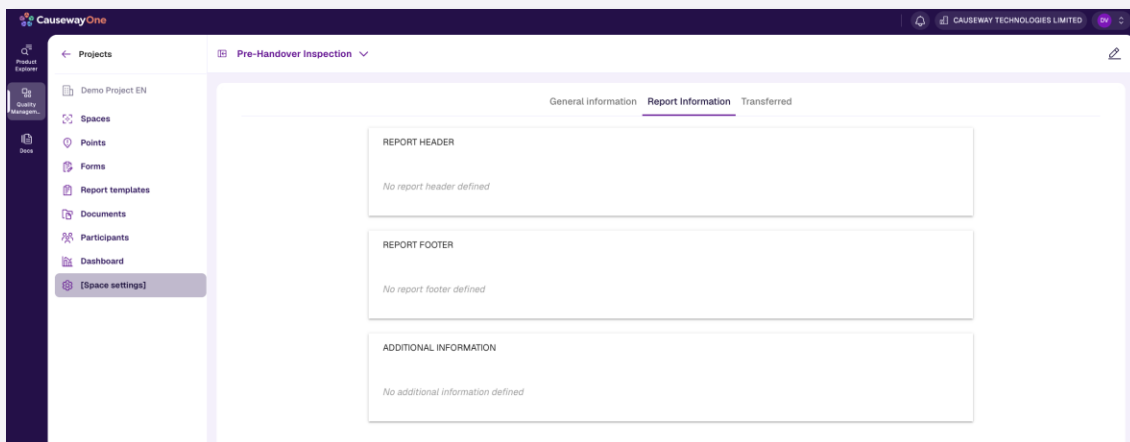
2.d. Custom Space settings

The **Report Information** tab allows you to customise how your reports will appear when generated from a Space. You can define the header and footer, and add additional information that will be included in the Space report. This ensures your reports contain the correct project details and follow your company's formatting or communication standards.

Header: Displayed at the top of the report. This can be used for Space-specific context, such as a short description of the inspection scope, meeting context, or instructions related to the content of the Space. **(1)**

Additional information: Also shown at the top of the report, below the header. This is useful for adding extra notes, clarifications, or project-specific comments that support the report content. **(2)**

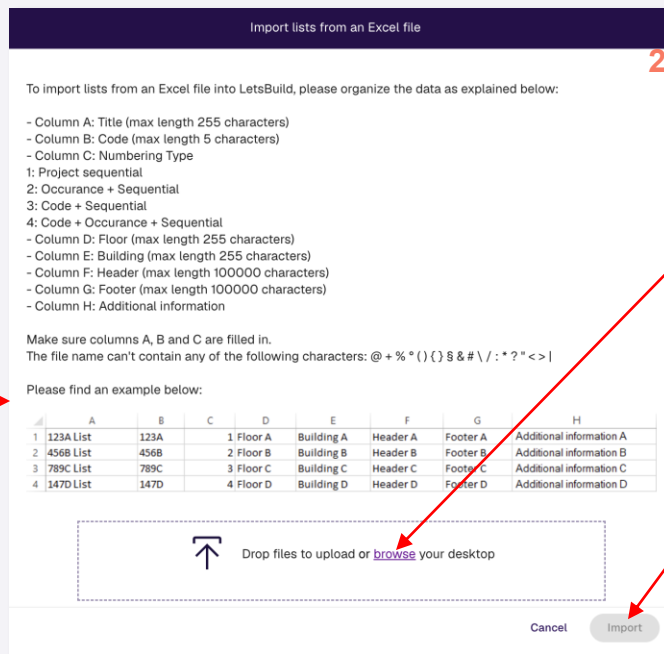
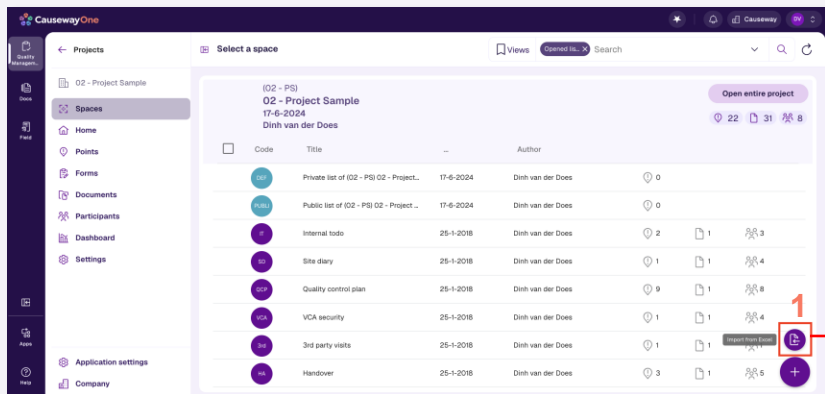
Footer: Displayed at the bottom of the report. This can be used for remarks such as internal notes, follow-up instructions, or any additional information you want consistently visible at the end of the report. **(3)**



II. Administrator (web)

2.e. Import Spaces via Excel

You can import Spaces from Excel to quickly set up your data in Aproplan. To do this, access the Spaces section and hover over the purple “+” button in the bottom-right corner and click the Import option that appears above it (1). A new window will open (2), explaining the required Excel structure to ensure your Space is imported correctly.



Once the Excel file is ready, upload it by dragging & dropping it into Aproplan, or click on the **browse** link.

After the upload is complete, click **Import** to import the Space into Aproplan.

II. Administrator (web)

3. Documents

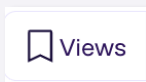
- a. Documents section
- b. Folder structure
- c. Add document
- d. Add new version

II. Administrator (web)

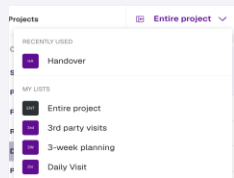
3.a. Documents section

The **Documents** section in Aproplan is used to store and manage all project-related files in one central place. Here, you can upload and access documents such as plans, reports, images, and other project files. This section helps keep all important information organised, easily accessible, and available to project participants for better collaboration and follow-up.

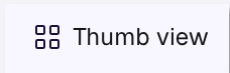
You can view your active and archived documents or use advanced search by clicking the **Views** button in the top-right corner (1).



From the Spaces menu in the top-left corner, you can switch between viewing documents on the entire project level or Space level (2).



You can also toggle between thumbnail view and list view (3).



The Documents list view is divided into six columns

Nbr points: Shows the number of points linked to a plan document.

Version: Indicates the current version of the document.

Document name: Displays the name of the document.

Type of document: Shows the document type (e.g. plan, image, report).

Uploaded by: Indicates who uploaded the document.

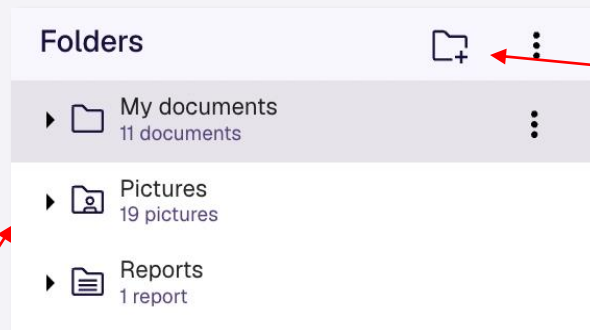
Upload date: Shows when the document was uploaded.

Nbr points	Version	Document name	...	Uploaded by	Upload date
31 results					
1	1	Plan_4_.pdf	Plan	Dinh van der Does	28-5-2026
0	1	Plan_APROPLAN_4_.pdf	Plan	Dinh van der Does	28-5-2026
0	1	O2 - PS - Daily visit	Report	Albin Gerhold	17-6-2024
1	1	Plan_APROPLAN	Plan	Albin Gerhold	17-6-2024
1	1	Plan_APROPLAN	Plan	Albin Gerhold	17-6-2024
0	1	Plan_APROPLAN	Plan	Albin Gerhold	17-6-2024
0	1	Plan_APROPLAN	Plan	Albin Gerhold	17-6-2024
2	1	Plan_APROPLAN	Plan	Albin Gerhold	17-6-2024
13	1	Plan_APROPLAN	Plan	Albin Gerhold	17-6-2024
1	1	Plan_APROPLAN	Plan	Albin Gerhold	17-6-2024
0	1	Plan_APROPLAN	Plan	Albin Gerhold	17-6-2024
1	1	Plan_APROPLAN	Plan	Albin Gerhold	17-6-2024

II. Administrator (web)

3.b. Folder structure

The folder structure in the **Documents** section helps you organise your files in a clear and structured way. You can create subfolders to manage your documents more efficiently. The main folders **My Documents**, **Pictures**, and **Reports** are included in your project by default. When opening a folder, its contents are displayed in a list on the right side of the folder structure.



To create a subfolder, click on the “+” button.

To switch between folder structure view and list view, click the folder icon:



To access the subfolders of a main folder, click the arrow to the left of the folder.

	Nbr points	Version	Document name	Plan	Uploaded by	Upload date
	1	1	Plan_4_.pdf	Plan	Dinh van der Does	28-5-2026
	0	1	Plan_APROPLAN_4_.pdf	Plan	Dinh van der Does	28-5-2026
	1	1	Plan_APROPLAN	Plan	Albin Gerhold	17-6-2024
	1	1	Plan_APROPLAN	Plan	Albin Gerhold	17-6-2024
	0	1	Plan_APROPLAN	Plan	Albin Gerhold	17-6-2024
	0	1	Plan_APROPLAN	Plan	Albin Gerhold	17-6-2024
	2	1	Plan_APROPLAN	Plan	Albin Gerhold	17-6-2024

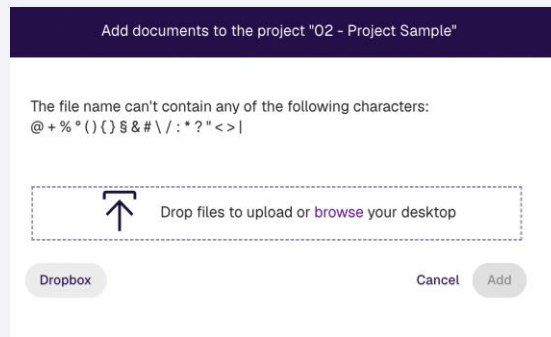
For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255014-aproplan-overview-of-the-documents-section-web-version>

II. Administrator (web)

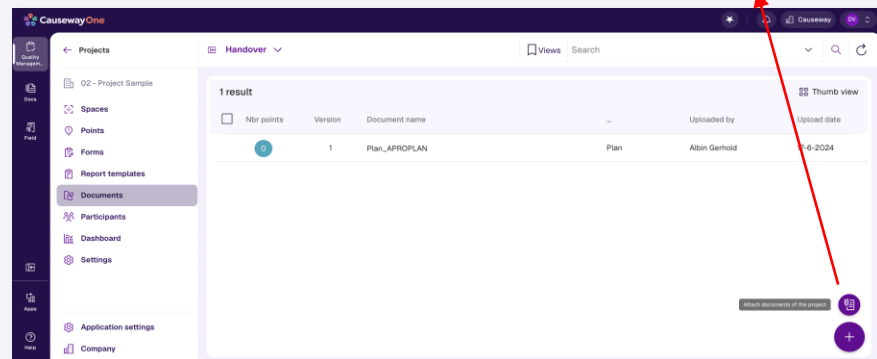
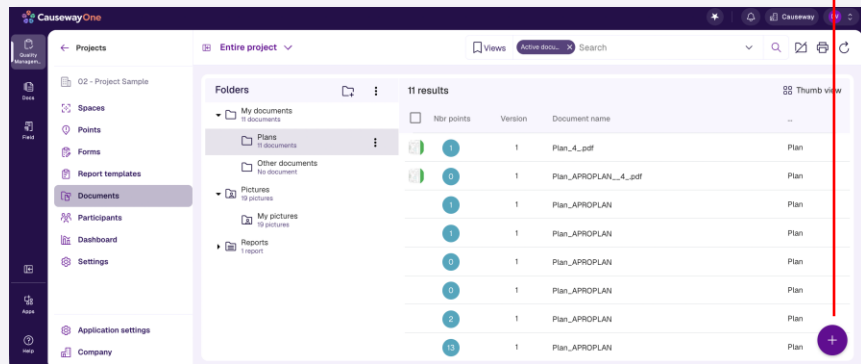
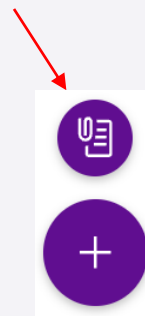
3.c. Add document

To add a document in the **Documents** section, first select the folder in the folder structure where you want to upload the document. Then click the purple “+” button in the bottom-right corner of the screen. This allows you to upload new documents and store them centrally within the project.

A new window will open where you can drag and drop files to upload, or click the **Browse** link to select files manually. You can also upload documents via Dropbox.



When viewing the **Documents** section on Space level, the Documents section will appear in list view. You can also choose to add a document from the entire project level by hovering over the purple “+” button and clicking the paperclip icon that appears.

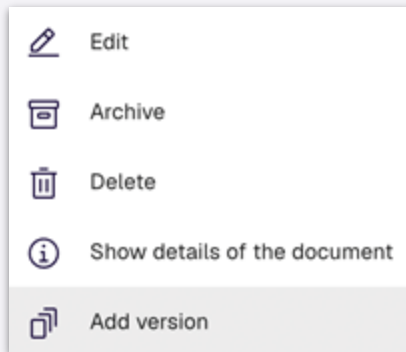


For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255031-aproplan-how-to-upload-a-document-web-version>

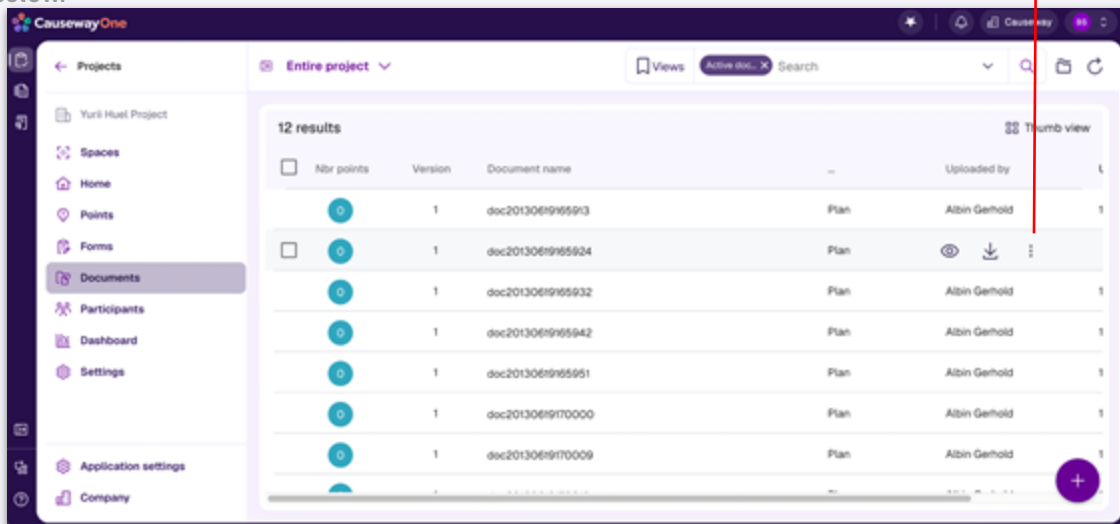
II. Administrator (web)

3.d. Add new version

Adding a new version of a plan document in Aproplan allows you to keep your files up to date while maintaining a full version history. This ensures that all changes are tracked, and users always have access to the latest version of a document without losing previous revisions. It is also possible to compare different versions of a plan. For more information on how to compare different plan versions, visit our FAQ article in the link below.



To add a new version of your plan document, hover with your cursor over the plan, and click on the three dots. From the menu that appears, click on **Add version**.



A new window will open where you can drag and drop files to upload, or click the **Browse** link to select files manually.

II. Administrator (web)

4. Participants & Access rights

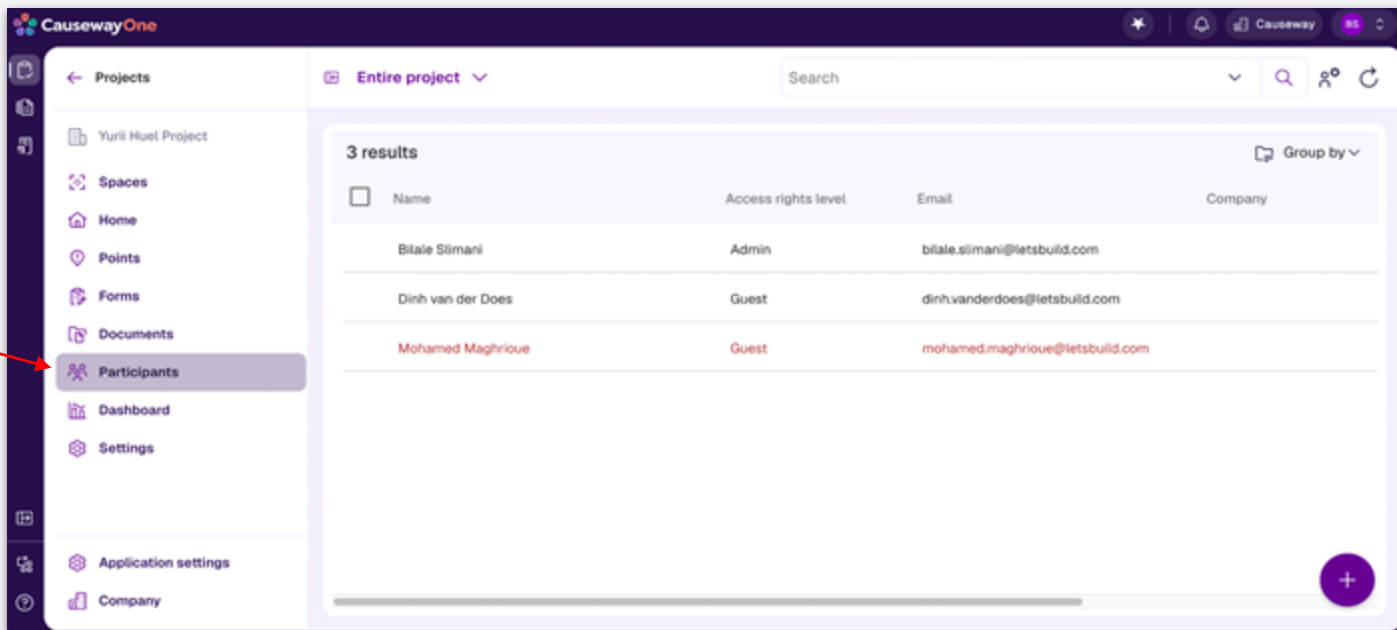
- a. Participants section
- b. Add participants
- c. Project access rights
- d. Space participants presence
- e. Space access rights

II. Administrator (web)

4.a. Participants section

The **Participants** section in Aproplan allows you to manage all users involved in the project. Here, you can invite new participants, assign roles and access rights, and control who can view or edit project information. You can view the Participants section on both project level and Space level by selecting the desired level from the Spaces menu in the top-left corner. The Participants section helps ensure clear collaboration and proper permission management across the project.

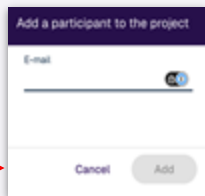
To access the Participants section, click on **Participants** in the navigation menu.



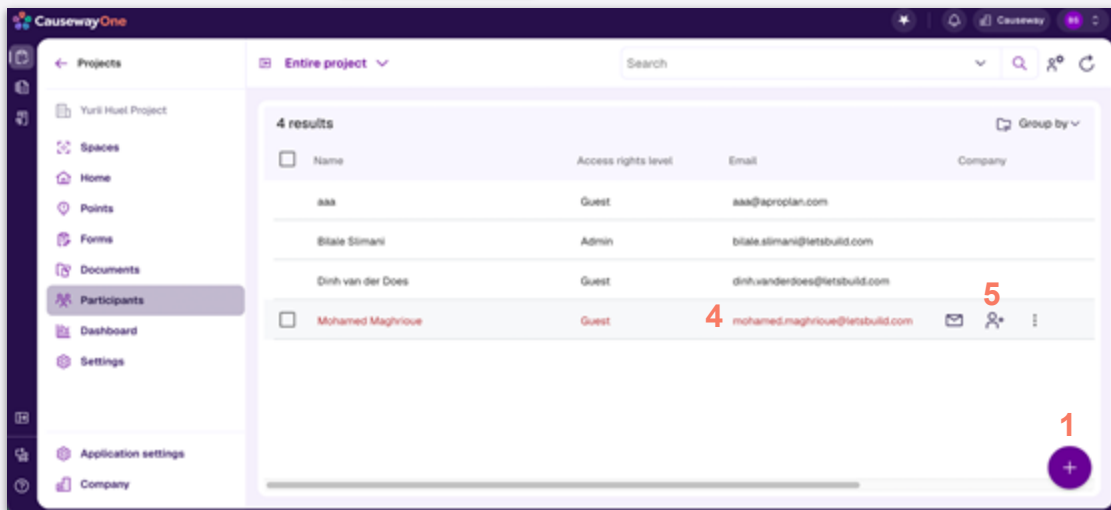
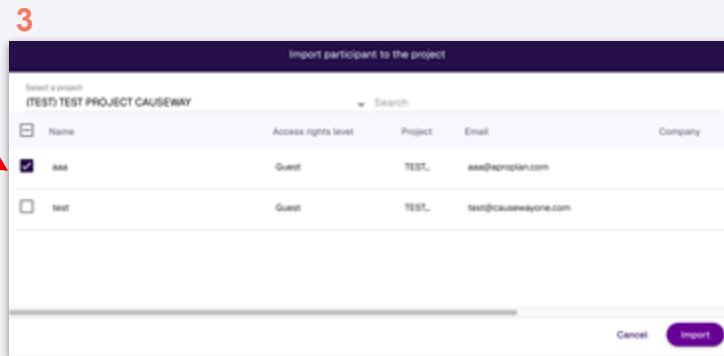
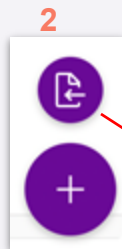
II. Administrator (web)

4.b. Add participants

To add a participant to your project, click the purple “+” button (1) and enter the participant’s username (login email address).



When hovering over the purple “+” button, the **Import Participants** option will appear (2). Clicking this opens a new window where you can import participants from another project (3).



If a participant’s name and details are highlighted in red in the participants section, it means the participant has been added to the project but has not yet been invited to the project (4).

To invite the participant, hover over their name and click the **Invite** button that appears (5). An invitation email will be sent to the participant.

Tip: To save time, it is also possible to add participants in bulk to a Space with specific access rights. View this FAQ below for more information.

For more information, visit our FAQ article:

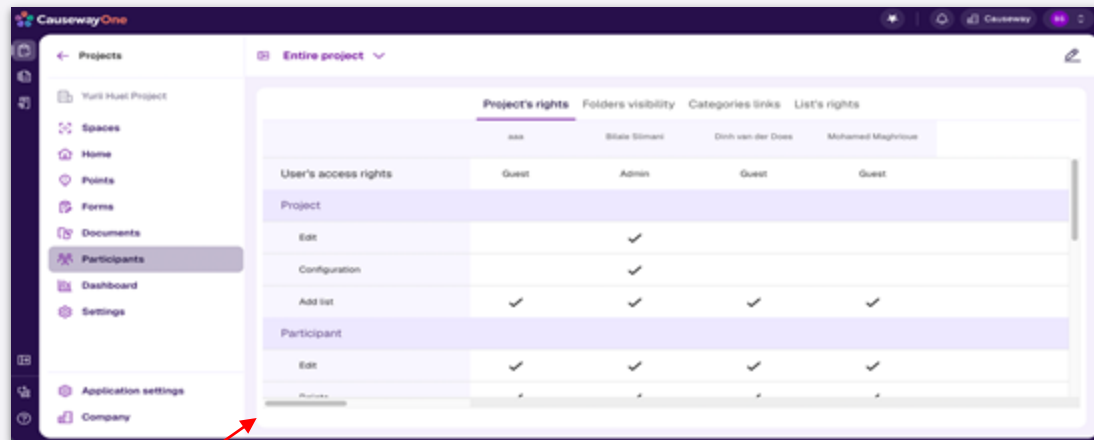
<https://help.letsbuild.com/en/articles/4258266-aproplan-overview-of-the-participants-section-web-version>
<https://help.letsbuild.com/en/articles/14169682-how-to-bulk-add-participants-to-lists-with-specific-access-rights-web-version>

II. Administrator (web)

4.c. Project access rights

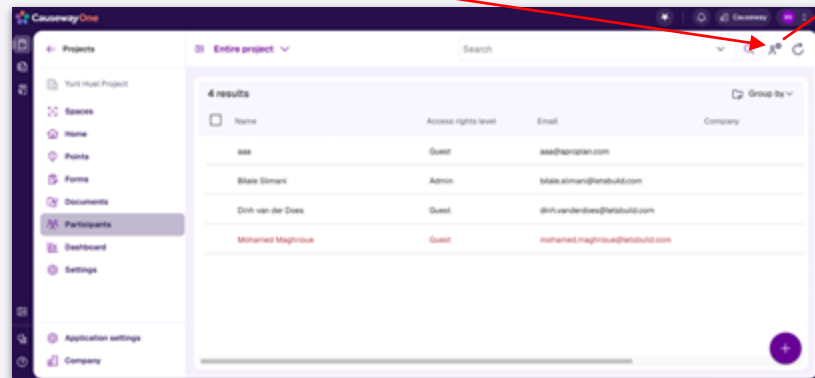
Project level access rights define what participants are allowed to do within the entire project. Depending on their role, users may have permission to view, add, modify, delete, upload, archive, or manage different elements such as the project structure, participants, folders, and documents.

To edit access rights, go to the **Participants** section on Entire project level and click the **Manage** icon in the top-right corner. The access rights settings are divided into four tabs, with the **Project's Rights** tab opening first by default.



In the **Project Rights** tab, click the pencil icon in the top-right corner to start managing the project-level roles of Guest, Contributor, Manager, and Administrator.

Here, you can define permissions for each role and control what actions they are allowed to perform across the project. For example, a participant with the project-level role of Administrator has the highest level of access rights and will have a checkmark displayed for all permissions.



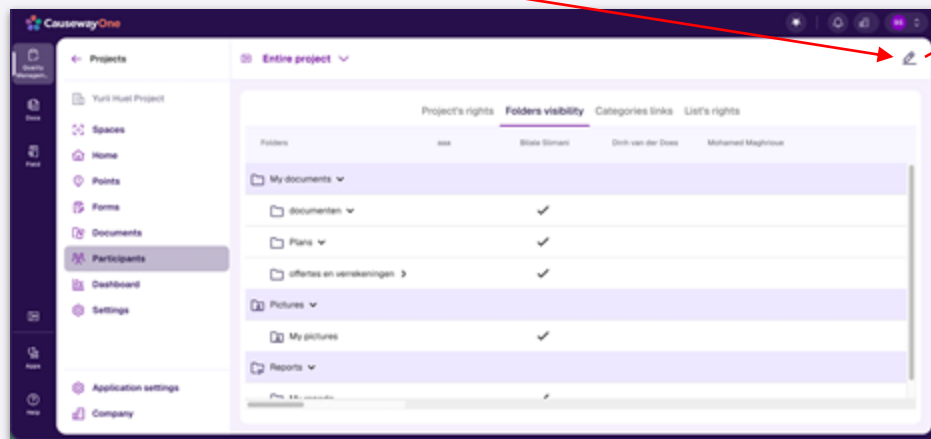
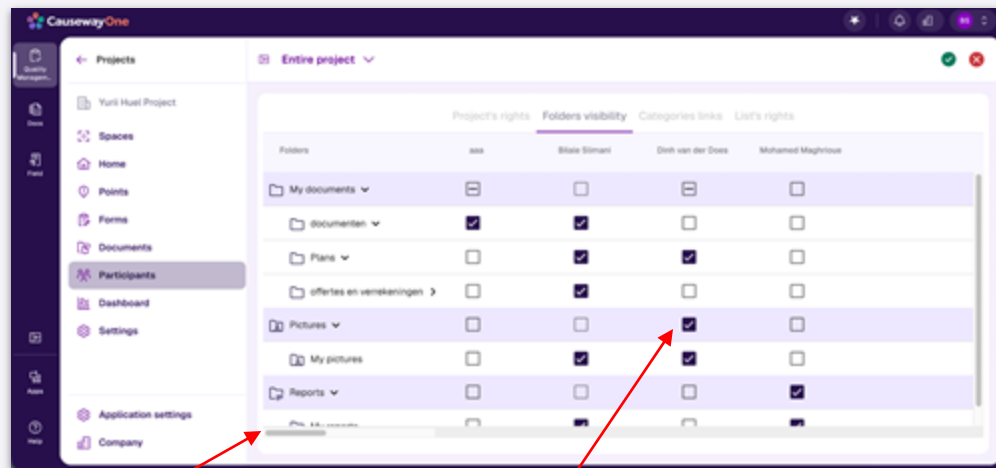
For more information, visit our FAQ article:

<https://help.letsbuild.com/en/articles/4255210-apoplan-how-to-manage-participants-on-the-entire-project-level-web-version>

II. Administrator (web)

4.c. Project access rights

The **Folders Visibility** tab allows you to manage which folders each participant can see within the project. This helps you control access to specific documents and ensures participants only see the folders relevant to them. Folders that are visible to participants are marked with a checkmark next to the corresponding folder under the participant's name. To edit folder visibility, click the pencil icon in the top-right corner.



To give folder visibility to a participant, select the checkbox of the specific folder under the participant's name. If the folder is unchecked, the folder will not be visible to that participant.

For more information, visit our FAQ article:

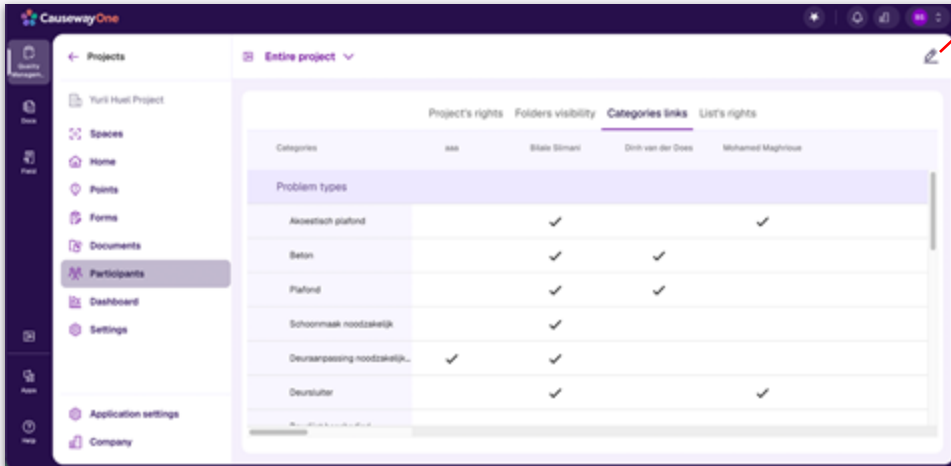
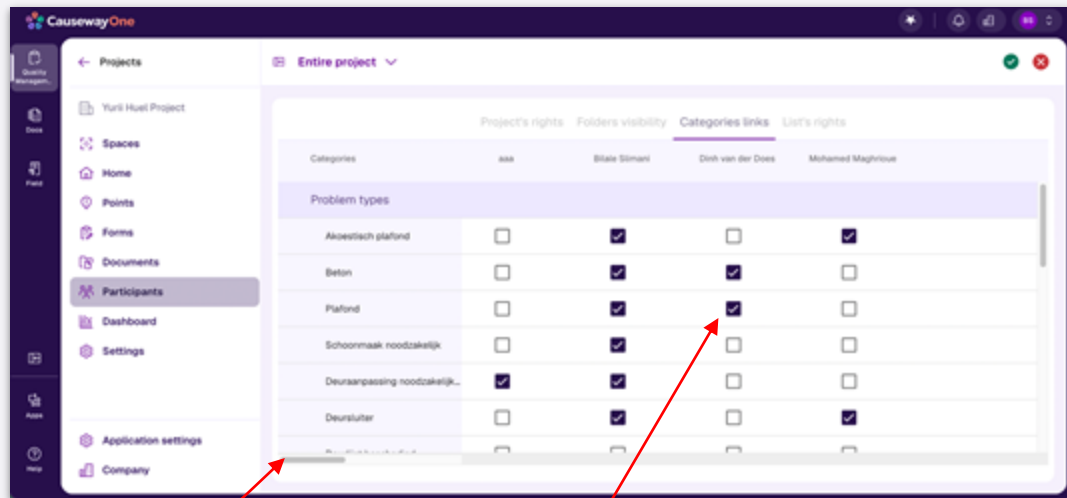
<https://help.letsbuild.com/en/articles/4255210-aproplan-how-to-manage-participants-on-the-entire-project-level-web-version>

II. Administrator (web)

4.c. Project access rights

Linking participants to categories ensures the right users are automatically associated with relevant work areas. When a new participant is invited, the user can link them to one or more categories.

It is also possible to link a specific participant directly to a category. For example, when a point is created under the category **0 Safety and health**, it will automatically be assigned to that participant.



To link a category to a participant, click the checkbox next to the subcategory under the participant's name. This will assign the participant as **user in charge** for that category. If the subcategory is unchecked, the participant will not be assigned as user in charge for that category.

II. Administrator (web)

4.c. Project access rights

The **List's Rights** are different from the Project Rights, as these permissions only apply to individual Spaces and not to the entire project. In this tab, the first column on the left displays an overview of all Custom Spaces within the project, while the following columns show all participants.

For each participant, you can assign one of the following access rights:

Not Invited

The user is not invited to the Space and cannot see or access it.

Subcontractor

Can only see points they are in charge of, while other points remain hidden. They can view and download Space documents, add comments with attachments, update certain point statuses, manage their own comments, and copy points to Spaces in which they are manager/admin.

Guest

Can view all points in the Space and access all related documents and reports. They can add comments, update point statuses, manage their own comments, and copy points to Spaces in which they are manager/admin.

CausewayOne

Quality Management

Docs

Field

←

Projects

Entire project

▼

02 - Project Sample

Spaces

Points

Forms

Report templates

Documents

Participants

Dashboard

Settings

Lists

Bilale Slimani

Clare O'Brien

Engineer

Engineer

Facilitator

Facilitator

Kaci Hegmann

3rd party visits

Not invited

Not invited

Not invited

Not invited

Not invited

Not invited

Admin

3-week planning

Not invited

Not invited

Manager

Not invited

Not invited

Subcontractor

Admin

Daily Visit

Not invited

Not invited

Manager

Not invited

Not invited

Subcontractor

Admin

Handover

Not invited

Not invited

Manager

Guest

Not invited

Subcontractor

Admin

Internal todo

Not invited

Not invited

Manager

Not invited

Not invited

Not invited

Admin

Quality control plan

Not invited

Guest

Manager

Guest

Guest

Subcontractor

Admin

Site diary

Not invited

Not invited

Manager

Guest

Not invited

Not invited

Admin

Toolbox

Not invited

Not invited

Manager

Not invited

Not invited

Subcontractor

Admin

VCA security

Not invited

Contributor

Not invited

Not invited

Contributor

Not invited

Admin

Contributor

Has the same rights as a Guest, with the additional ability to edit categories and users in charge for points.

Manager

Can create new points, edit and manage their own points, generate reports, link documents, and edit Space settings. They can also manage participants and update access rights within the Space.

Administrator

Has full control over the entire Space, including all points, comments, documents, and settings, regardless of authorship. They can manage participants, permissions, reports, and all Space configurations.

II. Administrator (web)

4.c. Space participants presence

In the **Participants** section at Space level, you can manage the presence status of each participant. To update a participant's status, click the pencil icon in the top-right corner.

Presence statuses are mainly used for meetings or inspection reports and can be displayed in reports to provide an overview of all participants in the Space and their attendance status.

Present

The participant is actively involved and expected to follow up on assigned points and tasks.

Absent

The participant is temporarily unavailable and is not expected to respond or complete actions during this period.

Excused

The participant is absent and has formally provided a reason for their absence, which is recorded and can be included in reports.

The screenshot shows the CausewayOne web application interface. On the left is a sidebar with navigation icons and labels: Quality Management, Docs, Field, and a list of menu items: Projects, Spaces, Home, Points, Forms, Documents, and Participants (which is highlighted). The main content area is titled 'security 2' and contains a table of participants. The table has columns: Name, Company, Role, Presence, Email, and Phone. The 'Presence' column is highlighted with a red rectangular box. The data rows are as follows:

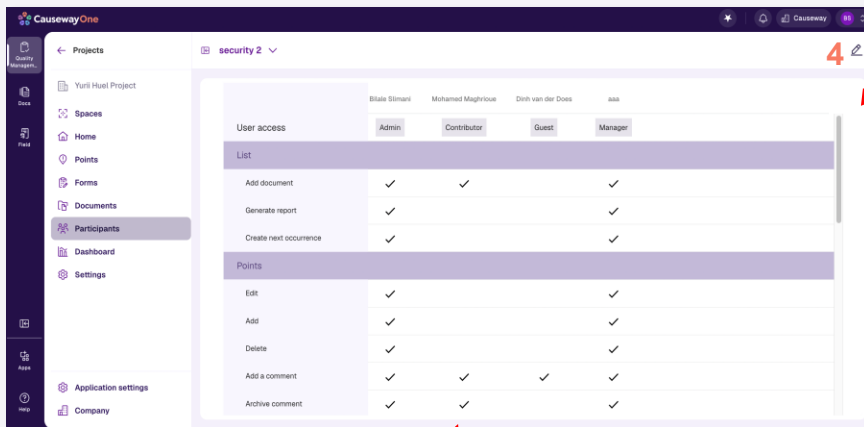
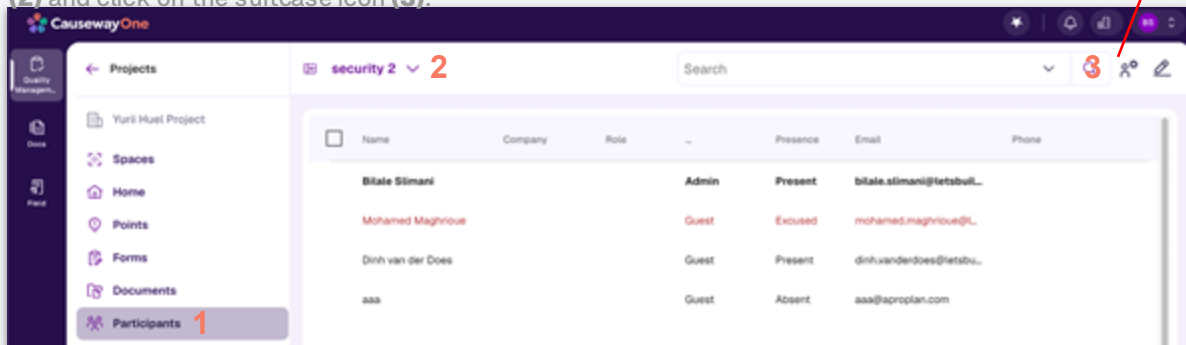
Name	Company	Role	Presence	Email	Phone
Bilale Slimani		Admin	Present	bilale.slimani@letsbuil...	
Mohamed Maghrioue		Guest	Excused	mohamed.maghrioue@L...	
Dinh van der Does		Guest	Present	dinh.vanderdoes@ietsbu...	
aaa		Guest	Absent	aaa@aproplan.com	

II. Administrator (web)

4.d. Space access rights

Space access rights in the participants section allow you to manage the permissions (roles) of each participant within a specific Space. Each role comes with a different set of permissions that defines what a participant can view and do in that Space. These access rights apply only at Space level and do not affect the participant's rights across the entire project.

To manage participant access rights at Space level, open the participants section (1), select the Space from the menu (2) and click on the suitcase icon (3):



A new page opens where you can assign access rights (roles) to participants.

To start editing, click on the pencil icon (4).

Each role grants specific permissions that determine what users can view and do within the selected Space, which is indicated by a checkmark next to the permission under the participant's name.

The roles you can choose from have the same permissions as described two slides ago : Subcontractor, Guest, Contributor, Manager, Administrator

II. Administrator (web)

5. Company

- a. Company section
- b. Add report templates
- c. Add form templates

II. Administrator (web)

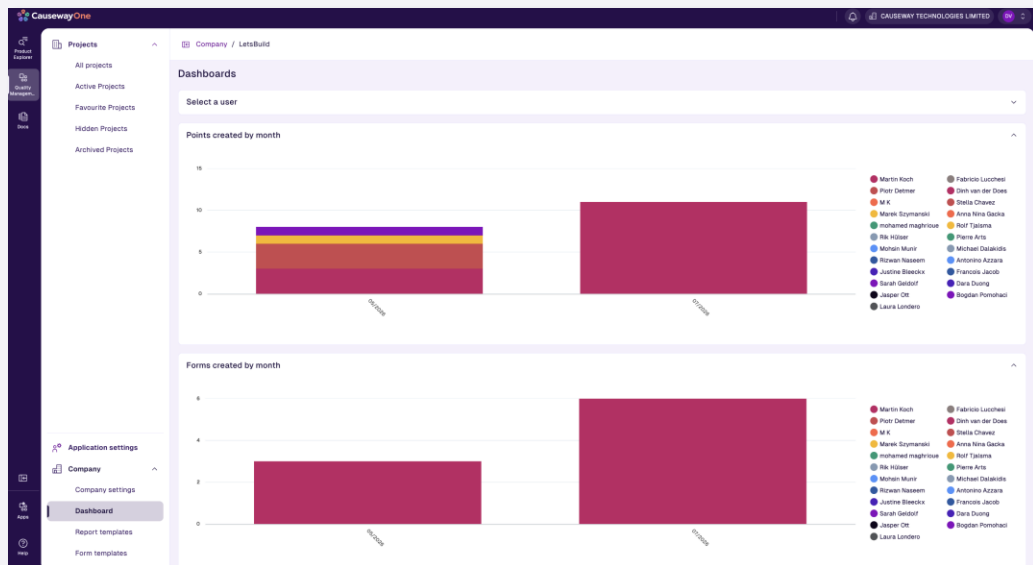
II.5.a. Company section

The Company section in Aproplan provides an overview of your company's information and shared resources. Rather than creating or managing companies directly within Aproplan, company information is inherited from the CausewayOne tenancy your user account belongs to. In CausewayOne, a tenancy represents your company, so company creation and member management are handled centrally through the CausewayOne platform.

Within the Company section, you can view your company details, access the dashboard with an overview of points and forms created each month, manage your company's shared report templates, and view or create company form templates that can be used across your organisation.

If you need to add or remove company members or update member roles, these actions must be performed from the CausewayOne Tenancy Members page rather than within Aproplan.

Note: The company section is not related to Aproplan license contracts and is used only to share templates and view user data.



II. Administrator (web)

5.b. Add report templates

To view your company report templates and add new ones, go to the **Reports templates** section in the navigation panel on the left side of your project. Here, you will find an overview of all report templates, displayed with the following columns: **Report Name, Type, Author, Updated, and Status.**

To add a report template to your company, click on the “+ Create Template” button in the top-right corner.

Create New Template

Template Name

Enter template name

☐ Company Template

A company template will be available to everyone in your company

Cancel

Create

CausewayOne

Product Explorer

Quality Management

Docs

Projects

Demo Project EN

Spaces

Points

Forms

Report templates

Documents

Participants

Dashboard

Project settings

CAUSEWAY TECHNOLOGIES LIMITED

DV

Demo Project EN / Report templates

+ Create Template

All report templates

Kind

Type	Name	Author	Updated	State
System (1)				
Point	Summary point list		25 Jul 2015	Active
Company (2)				
Point	Form template demo 1	dinh.vanderdoes@letsbuild.c...	09 Jul 2026	Active
Point	Template demo 1	dinh.vanderdoes@letsbuild.c...	09 Jul 2026	Active

After naming the report template, click the “Create” button. A new page will open where you can configure the template by setting the cover page, header and footer, any additional information and template settings.

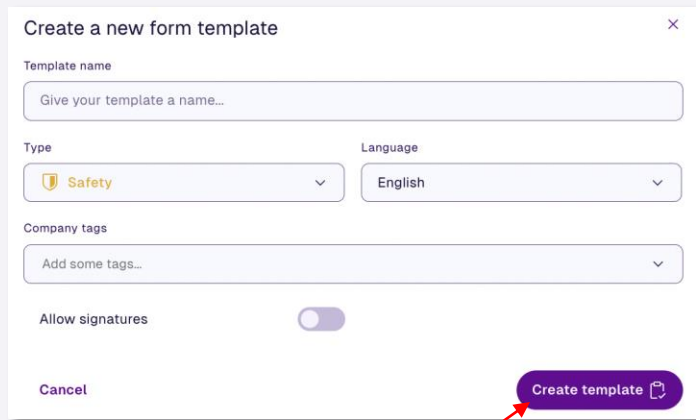
II. Administrator (web)

5.c. Add form templates

To view your company form templates, go to the **Forms** section in the navigation panel on the left side. Here, you will find an overview of all form templates available within your company. In the Forms section of your company, you can also add a new form template by using the Form Template Builder tool.

Note: More information on the Form Template Builder tool will be covered later in this guide.

To add a new form template to your company section, click on the “+ Add new template” button in the top-right corner.



Create a new form template

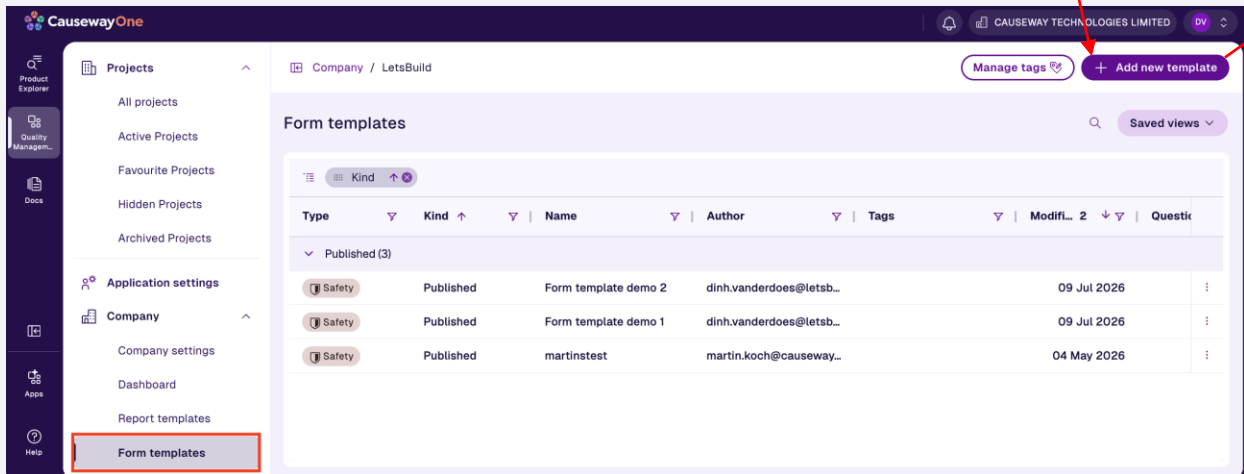
Template name
Give your template a name...

Type: Safety Language: English

Company tags
Add some tags...

Allow signatures ☐

Cancel Create template



CausewayOne

Product Explorer
Quality Management
Docs

Projects
All projects
Active Projects
Favourite Projects
Hidden Projects
Archived Projects

Application settings
Company
Company settings
Dashboard
Report templates
Form templates

Company / LetsBuild

Manage tags + Add new template

Form templates

Kind

Type	Kind	Name	Author	Tags	Modifi...	Questi...
Published (3)						
Safety	Published	Form template demo 2	dinh.vanderdoes@letsb...		09 Jul 2026	
Safety	Published	Form template demo 1	dinh.vanderdoes@letsb...		09 Jul 2026	
Safety	Published	martintest	martin.koch@causeway...		04 May 2026	

After filling in all the fields in the form template creation window, click “Create template”. This will open the **Form Template Builder** tool.

III. User (web)

- 1. Points
- 2. Reports
- 3. Forms

III. User (web)

1. Points
 - a. Points section
 - b. Create a point
 - c. Edit a point
 - d. Edit points in bulk

III. User (web)

1.a. Points section

The **Points** section provides an overview of all points created within a project. It allows users to easily track and follow up on items that are relevant to them or their team.

In this section, you can view a list of all points with key information such as title, status, category, assigned users, and due dates. Depending on your access rights, you can open individual points to view details, add comments, upload attachments, or update the status.

To open the points page, click on **Points** in the navigation panel on the left side.

The screenshot shows the CausewayOne web application interface. On the left, a navigation sidebar contains a 'Points' menu item, which is highlighted with a red rectangular box. The main content area is titled 'Active points - 4 results' and displays a table of points. The table has columns for Status, ID, Category, Subject, Location, Space, and Due date. The data rows are as follows:

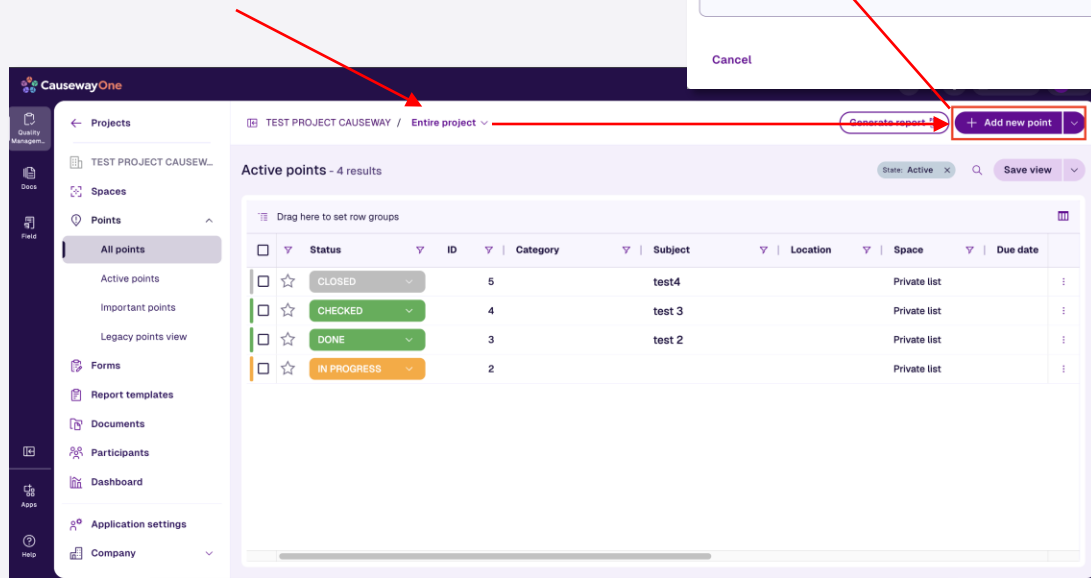
Status	ID	Category	Subject	Location	Space	Due date
CLOSED	5		test4		Private list	
CHECKED	4		test 3		Private list	
DONE	3		test 2		Private list	
IN PROGRESS	2				Private list	

For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255714-aproplan-overview-presentation-of-the-points-web-version>

III. User (web)

1.b. Create a point

To create a new point in Aproplan, select a Space or project level in the navigation panel and click on the “Add point” button in the top-left corner.



A new window opens where you can enter the point's details, such as:

Category: Select a category from a dropdown list to help organise and group related points.

Subject: Choose or enter the subject of the point from a dropdown option, defining its main topic.

User in charge: Select one or more responsible participants from a dropdown list to assign ownership of the point.

Space: If you create the point at project level, you can choose in which Space the point will be created.

Status: Define the current progress state of the point (e.g. open, in progress, closed).

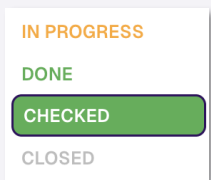
Due date: Set a deadline for when the point should be completed or resolved.

Custom fields: Add additional project-specific information if required.

Leave a comment: Add context, instructions, or remarks related to the

III. User (web)

1.c. Edit a point



To change the status of a point in the Points section overview, click on the status and select a new status from the drop-down menu that appears.

When left-clicking on a point, the point details panel will open on the right-hand side. From here, you can:

- Modify the point name
- Change the users in charge
- Update the due date
- Move the point to another Space
- Change the category
- Update the location
- Edit custom fields
- Add attachments
- Add comments
- Mark the point as favourite

TEST PROJECT CAUSEWAY / Entire project

All points - 4 results

	Status	ID	Category	Subject	Location
☐	CLOSED	5		test4	
☐	CHECKED	4		test 3	
☐	DONE	3		test 2	
☐	IN PROGRESS	2			

Point details

test 3

Created by: BS Bilale Slimani

Important? ☐

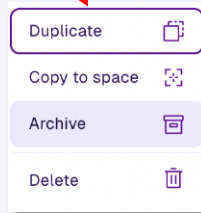
User(s) in charge: Assign users in charge...

Due date: Set the due date...

Space: Private list

Category: Pick your category...

Location: Add a comment...



Click on the three dots in the top-right corner of the point details panel to open a menu where you can choose to duplicate, copy the point to another Space, archive it, or delete it.

For more information, visit our FAQ articles below:

<https://help.letsbuild.com/en/articles/4255770-aproplan-how-do-i-edit-a-point-web-version>

<https://help.letsbuild.com/en/articles/4255794-aproplan-how-do-i-filter-points-web-version>

III. User (web)

1.d. Edit points in bulk

It is also possible to edit multiple points at once using bulk actions. With these actions, you can update point details, move points to another Space, add attachments, add comments, or delete points. To edit points in bulk, select the desired points by checking the checkboxes.

A panel will open on the left side where you can choose the available bulk edit actions by clicking on them.

The screenshot displays the CausewayOne web application interface. On the left, a sidebar contains navigation options: Quality Management, Docs, Field, Forms, Report templates, Documents, Participants, Dashboard, Application settings, and Company. The main content area is titled 'TEST PROJECT CAUSEWAY / Entire project' and shows 'All points - 4 results (3 selected)'. A table lists four points with columns for Status, ID, Category, Subject, and Location. The first point is 'CLOSED' with ID 5 and Subject 'test4'. The next three points are 'CHECKED', 'DONE', and 'IN PROGRESS' with IDs 4, 3, and 2, and Subjects 'test 3' and 'test 2'. A red box highlights the selection checkboxes for the last three points. A red arrow points from the text 'A panel will open on the left side...' to a 'Bulk Point Actions' panel on the right. This panel, titled '3 Points selected', lists various actions: Generate report, Update status, Add/replace users in charge, Remove users in charge, Change the subject, Update due date, Move to space, Copy to space, Change category, Change location, Mark/unmark as important, and Archive/restore points.

Status	ID	Category	Subject	Location
CLOSED	5		test4	
CHECKED	4		test 3	
DONE	3		test 2	
IN PROGRESS	2			

3 Points selected
Bulk Point Actions

- Generate report
- Update status
- Add/replace users in charge
- Remove users in charge
- Change the subject
- Update due date
- Move to space
- Copy to space
- Change category
- Change location
- Mark/unmark as important
- Archive/restore points

III. User (web)

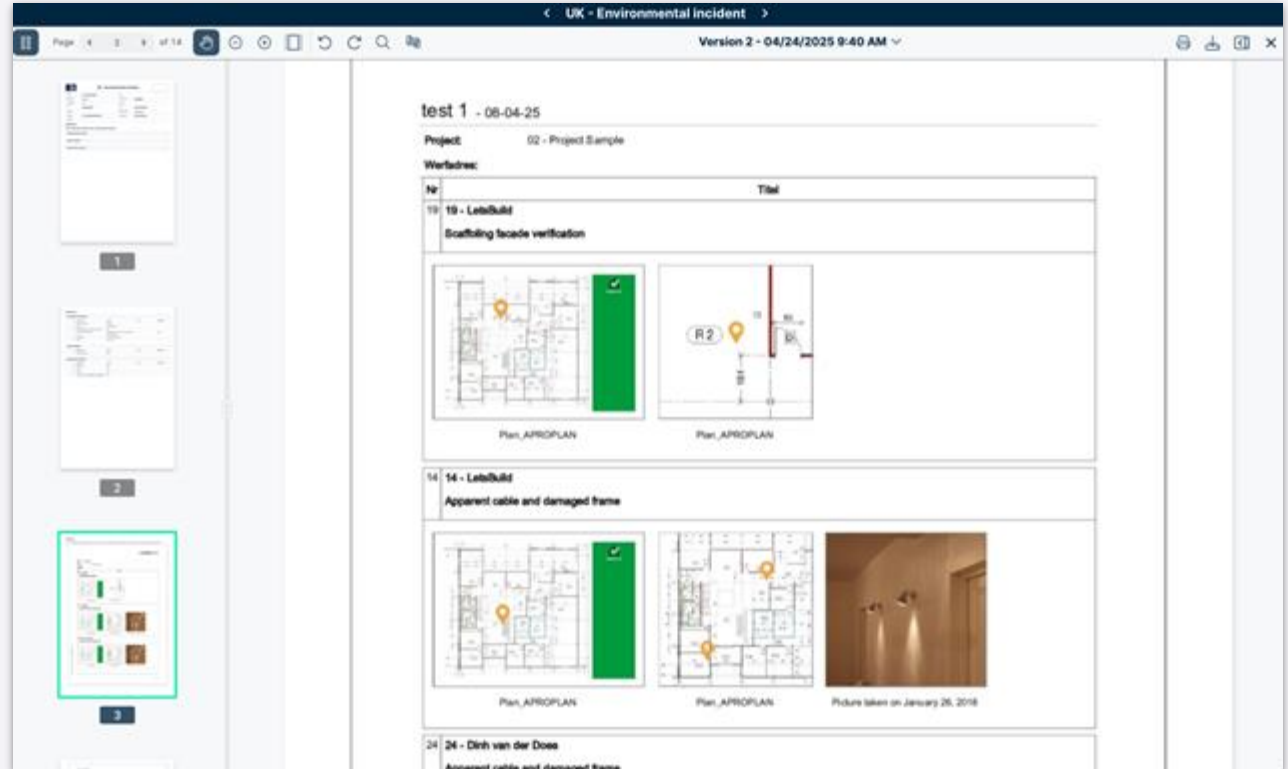
2. Reports

- a. Generate report
- b. Report templates

III. User (web)

2.a. Generate report

Reports are used to compile and share an overview of selected points within a project or Space. They help document progress, responsibilities, and decisions, and can be shared with stakeholders for follow-up or record keeping.



For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255466-aproplan-how-to-generate-a-report-web-version>

III. User (web)

2.a. Generate report

Before generating a report, you can refine your point selection by adjusting the Points page view. Click the three dots next to the column to open the available options to sort, filter, group, and organise the columns according to your needs.

Once you have configured the desired view and applied your settings, click on “Save view” to keep your customised layout.

Contains

Filter...

Reset

Save view

Save this set of searches, filters, columns, groupings, and sorting for quick access next time you need them. Choose “Save as new view...” to create a new view and keep the original view unchanged.

View criteria

Sorted by: Modification date: Descending

Columns: Importance, Status, ID, Category, Subject, Location, Space, Due date, Modification date, In charge, Author

View name

Add a name for your view...

☐ Replace existing view ☒ Save as new view

Cancel Save view

Upon saving the view, a new window opens prompting you to save your selected searches, filters, columns, groupings, and sorting for future use. You can give this view a name and choose to either replace an existing view or save it as a new one. To finalise, click on “Save view”.

Quality Management

Docs

Field

Projects

TEST PROJECT CAUSEWAY / Entire project

Generate report

Add new point

All points - 4 results

Drag here to set row groups

	Status	ID	Category	Subject	Location	Space	Due date
☐	CLOSED	5		test4		Private list	
☐	CHECKED	4		test 3		Private list	
☐	DONE	3		test 2		Private list	
☐	IN PROGRESS	2				Private list	

Save view

For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255466-aproplan-how-to-generate-a-report-web-version>

III. User (web)

2.a. Generate report

To generate a point report, go to the Points section by clicking **Points** in the navigation menu on the left side, and select either a Space or the entire project level. Then select the points you wish to include in the report and click **Generate report**.

Generate report ×

Choose a name for your report here, select the template to use and set the options.
To edit your templates, please visit the Report Templates page.

Report title

Report template

Report language

☒ Generate one report per user in charge

Cancel Generate report

A new window opens where you can enter a report title, select a report template from the drop-down menu, choose the language of the report, and configure additional options such as generating one report per user in charge (splitting points per responsible user) and sending the report by email.

CausewayOne

Projects | TEST PROJECT CAUSEWAY / Entire project

All points - 4 results

	Status	ID	Category	Subject	Location	Space	Due date
☒	CLOSED	5		test4		Private list	
☒	CHECKED	4		test 3		Private list	
☒	DONE	3		test 2		Private list	
☒	IN PROGRESS	2				Private list	

Space report & Project report

Before generating a report, ensure you select the Space you want the report to be generated from in the Spaces menu in the navigation panel. A Space report is generated from a specific Space and includes only points from that Space, while a project report is generated at project level and can include points from multiple Spaces within the project.

For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255466-aproplan-how-to-generate-a-report-web-version>

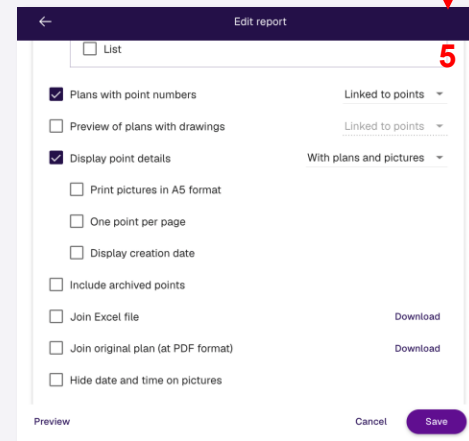
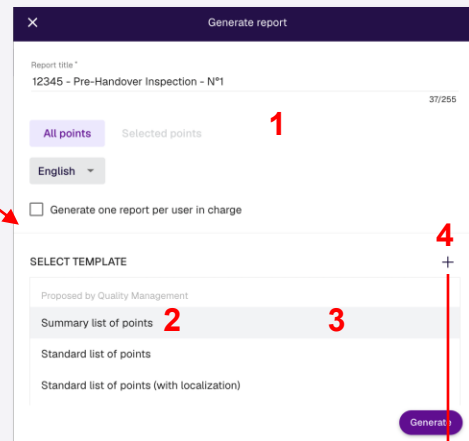
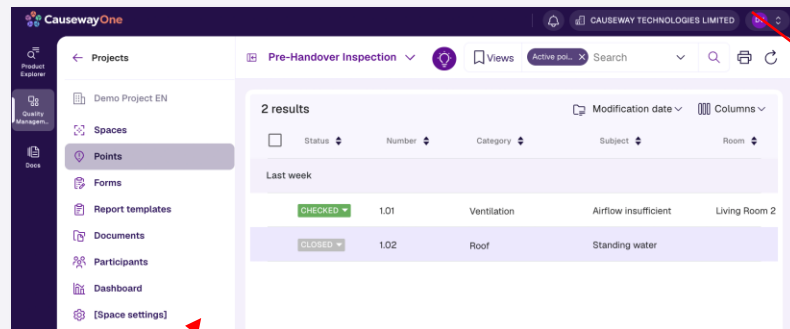
III. User (web)

2.b. Report templates

Before generating a report, you can create a new report template or edit an existing one. A report template defines the layout, structure, and content of your reports, ensuring consistency across your project documentation.

To get started, click on the Points page version button to switch to the V1 (old) points page.

In the old points page, either select the points from the Space or directly click on the “Generate report” button (printer icon) to open the report settings.



A new window opens where you can fill in the report details (1) and select an existing report template to generate the report with (2), or choose to preview or edit (3) a selected template. To create a new report template, click on the “+” button (4).

After clicking the “+” button, the report settings will expand within the same window (5). Here, you can give your new personal report template a name and configure its parameters. Make sure to click “Save” once you have finished creating the template.

For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255626-aproplan-how-to-create-and-save-a-report-template-web-version>

III. User (web)

2.b. Report templates

There are different types of report templates depending on where they are managed and used. The report templates can be found in the template list in the report settings:

System report templates

These templates are managed at company level and can be shared with other members of your company, depending on their access rights.

Personal report templates

These are created by yourself and are only visible and usable by you.

Type	Name	Author	Updated	State
System (1)				
Point	Summary point list		25 Jul 2015	Active
Personal (2)				
Point	new	bilale.slimani@letsbuild.com	08 Jun 2026	Active
Point	TEST	bilale.slimani@letsbuild.com	08 Jun 2026	Active

For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255626-aproplan-how-to-create-and-save-a-report-template-web-version>

III. User (web)

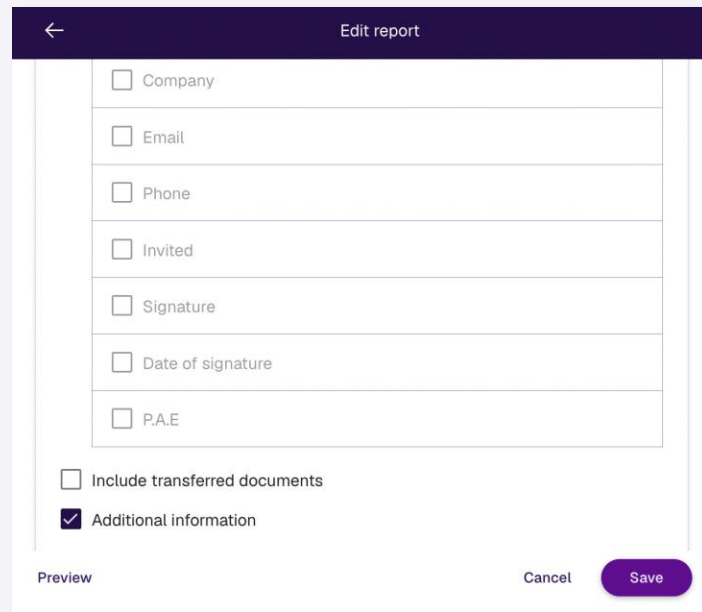
2.b. Report templates

Project report templates vs Space report templates

Project report templates are created at project level and can be used for reports containing points from multiple Spaces within the project. Space report templates are linked to a specific Space and allow additional configuration options, such as selecting and ordering extra columns including:

- Name
- Role
- Company
- Email
- Phone number
- Invited status
- Signature
- Date of signature
- P.A.E. (Present, Absent, Excused) statuses.

Note: You can also choose to include transferred documents and additional information in the report.



The screenshot shows a mobile application interface for editing a report. At the top is a dark purple header bar with a back arrow on the left and the text 'Edit report' on the right. Below the header is a list of seven items, each with a checkbox and a label: 'Company', 'Email', 'Phone', 'Invited', 'Signature', 'Date of signature', and 'P.A.E'. Below this list are two more options: 'Include transferred documents' (checkbox) and 'Additional information' (checkbox with a checkmark). At the bottom of the screen are three buttons: 'Preview' on the left, 'Cancel' in the middle, and a purple 'Save' button on the right.

Additional column options can be found by scrolling down in the **Edit report** window.

III. User (web)

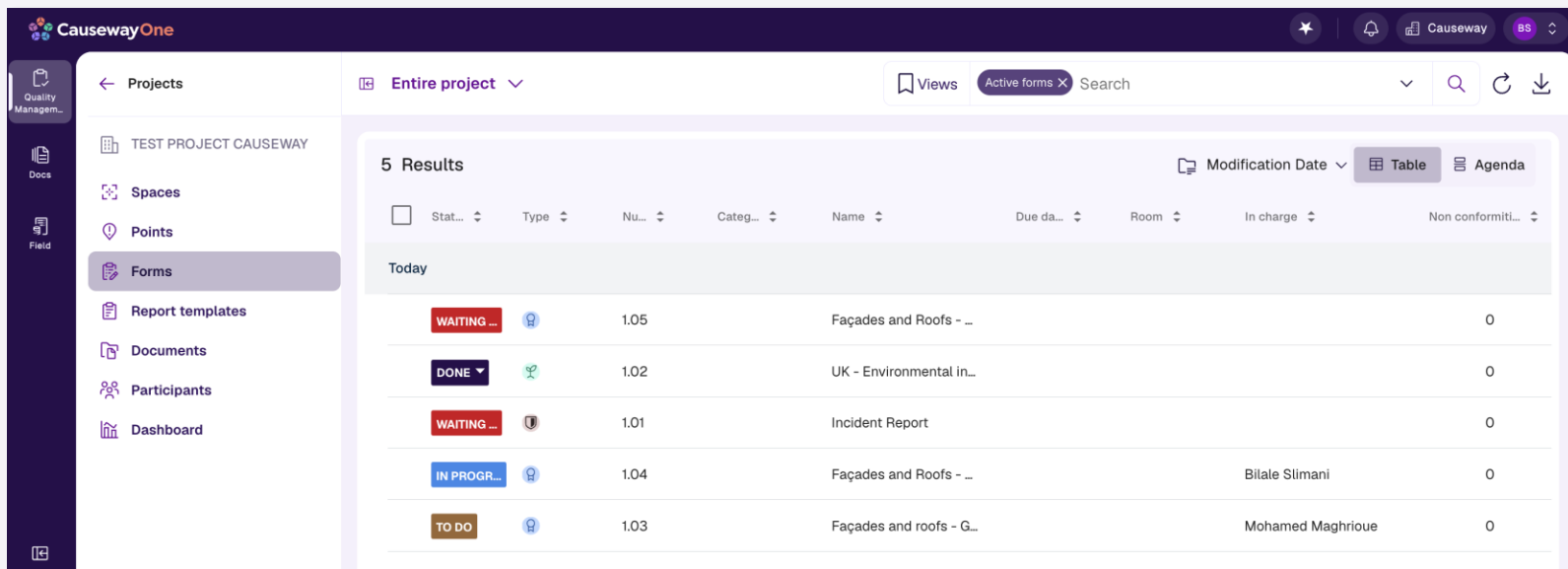
3. Forms

- a. Forms section
- b. Different form types
- c. Form Template Builder
- d. Create, assign, and plan a form
- e. Fill in a form

III. User (web)

3.a. Forms section

Forms are digital checklists for QHSE inspections, audits, quality controls, and site activities in construction and facility management, replacing paper forms and enabling structured data capture online or offline. They allow recording of non-conformities, remarks, photos, documents, and creation of tasks (Points) to follow up on issues, supporting a complete inspection workflow. Forms are categorized into Quality, Safety, and Environment and are created from templates at project or Space level, mainly filled in via mobile, with exports via the web application. Once finalized, a PDF report is automatically generated and stored in the relevant project or Space for authorized users.



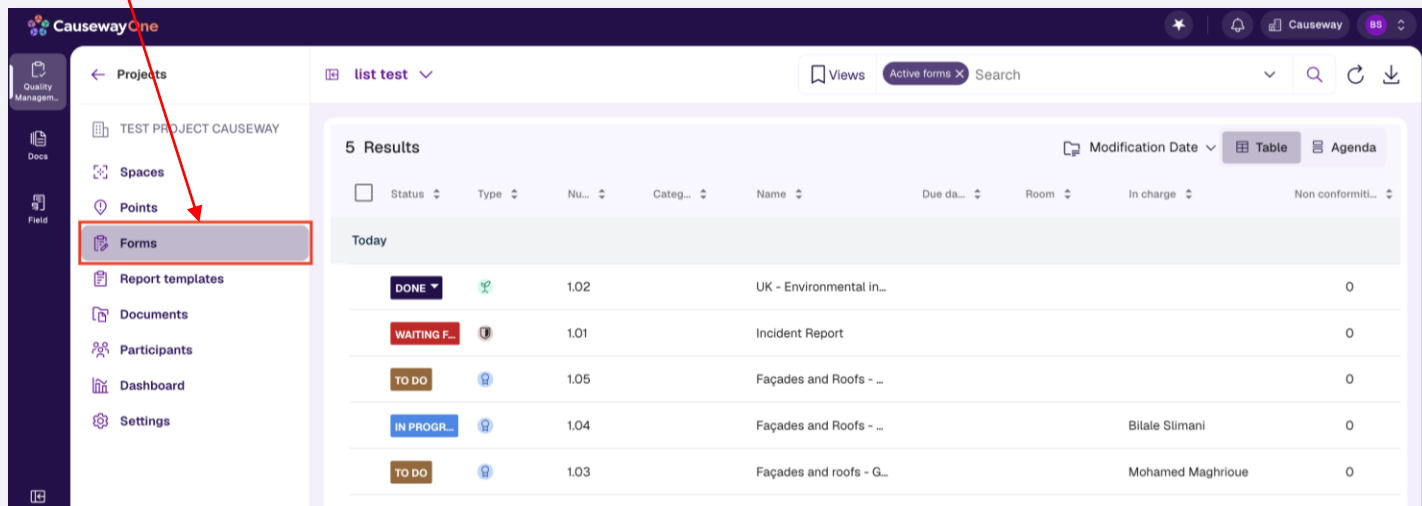
Stat...	Type	Nu...	Categ...	Name	Due da...	Room	In charge	Non conformiti...
Today								
WAITING ...	🔧	1.05		Façades and Roofs - ...				0
DONE ▾	✅	1.02		UK - Environmental in...				0
WAITING ...	🔧	1.01		Incident Report				0
IN PROGR...	🔧	1.04		Façades and Roofs - ...			Bilale Slimani	0
TO DO	🔧	1.03		Façades and roofs - G...			Mohamed Maghrioue	0

For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4277705-aproplan-overview-presentation-of-the-forms-web-mobile-version>

III. User (web)

3.a. Forms section

To access Forms, click on the **Forms** section in the navigation panel on the left-hand side.



The Forms section is organized into 11 columns to help you manage and track form-related information:

Status: shows the current state of the form (e.g. open, in progress, completed)

Room: indicates the specific location or area the form relates to

Type: indicates the form type (e.g. inspection, audit, checklist)

In charge: identifies the person responsible for completing or managing the form

Number: is the unique identifier of the form

Non conformities: shows any issues or deviations recorded during the form

Category: defines whether the form belongs to Quality, Safety, or Environment

Points: lists the tasks created from identified issues that need follow-up

Name: is the title or description of the form

Space: indicates the Space the form is linked to within the project structure

Due date: shows the deadline for completing the form

III. User (web)

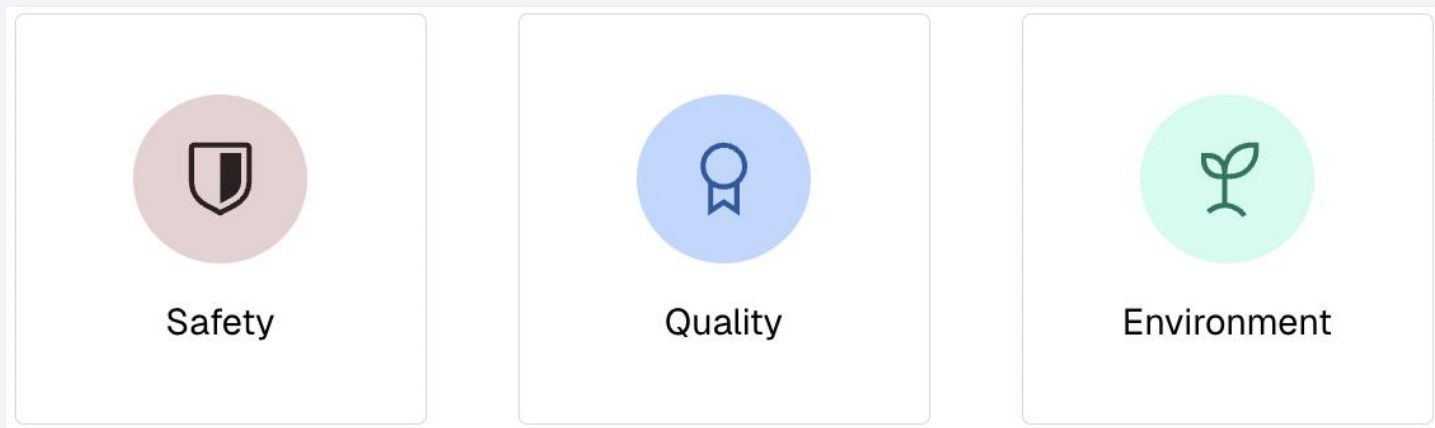
3.b. Different form types

There are 3 types of forms in Aproplan:

Safety: Safety forms cover all questions related to worker safety as well as site working conditions (e.g. safety briefings, safety checks, accidents).

Quality: Quality forms ensure that the work performed meets the expected standards (e.g. façade and roofing, finishing work).

Environment: Environment forms ensure that the environmental aspects of a project are taken into account (e.g. management, storage, and disposal of chemical products).



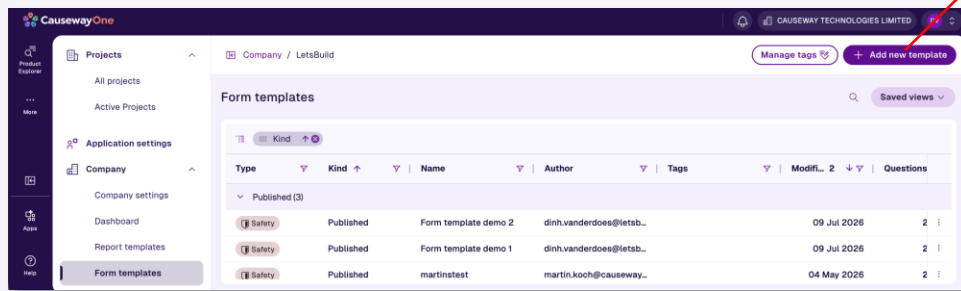
For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4277705-aproplan-overview-presentation-of-the-forms-web-mobile-version>

III. User (web)

3.c. Form Template builder

The **Form Template Builder** allows you to create and customize digital form templates directly in the platform. You can structure forms with sections and questions, define answer types, set predefined answers and non-conformities, and configure options like comments, attachments, and visibility rules to support inspections and audits. Templates can be created or edited in draft mode and published when ready, making them available for teams to use in the field.

On the V2 Forms Templates page in the **Company** section, click on + **Add New Template** to create a new form template in the **Form Template Builder**:



This is a modal dialog titled 'Create a new form template'. It contains the following fields and controls:

- Template name:** A text input field with the placeholder 'Give your template a name...'.
- Type:** A dropdown menu currently set to 'Quality'.
- Language:** A dropdown menu currently set to 'English'.
- Company tags:** A dropdown menu with the placeholder 'Add some tags...'.
- Allow signatures:** A toggle switch, currently turned off.
- Buttons:** A 'Cancel' button on the bottom left and a 'Create template' button on the bottom right.

A new window opens where you can name the template, select the form type, set the language, add company tags, and choose whether to include signatures. Click **Create Template** to get started.

This is the 'Form template builder' interface. At the top, there are buttons for 'Discard draft' and 'Publish template'. Below is a breadcrumb trail: 'Company / LetsBuild / Form templates / Form template builder'. The main area is titled 'demo form template' and shows a form structure with sections and questions. A red arrow points from the 'Create template' button in the previous dialog to this interface.

Form structure details:

- section 1:** Contains 'New section' and 'question 1.1'.
- question 1.1:** A 'New question' with 'Question type' set to 'Free text'. It includes a toggle for 'Include predefined answer' and a text input for 'Enter the predefined answer...'.
- Buttons:** '+ Add a question' and '+ Add another section' are at the bottom.

For more information, visit our FAQ articles below:

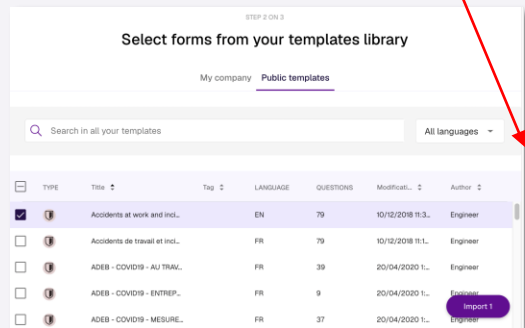
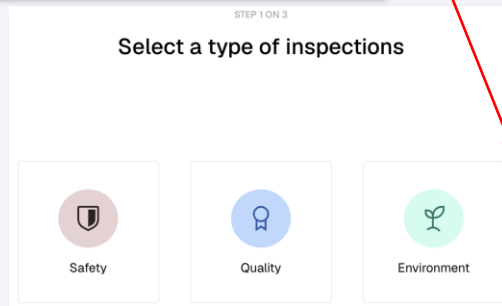
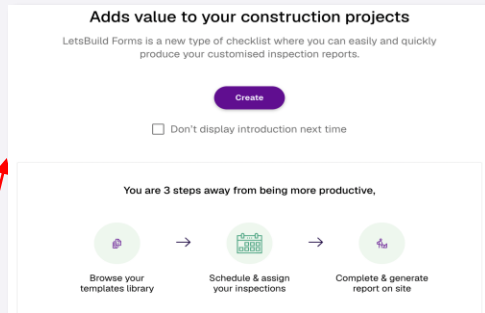
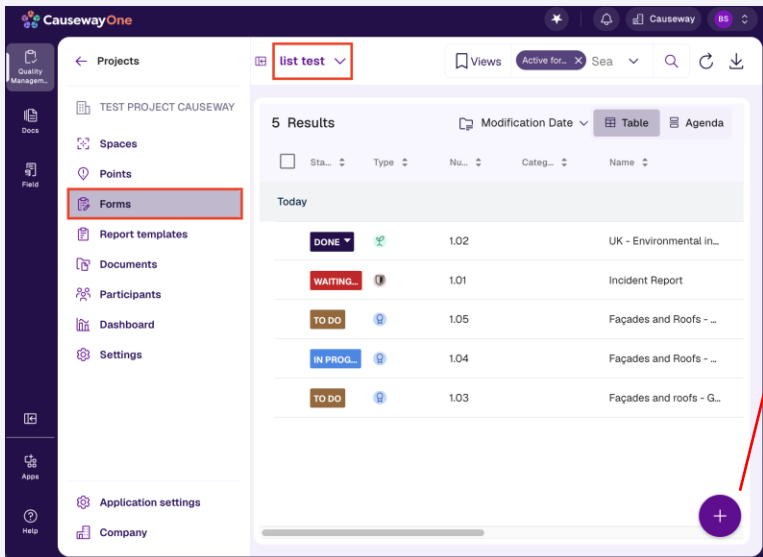
<https://help.letsbuild.com/en/articles/t1829558-aproplan-form-templates-page-v2-web-version>
<https://help.letsbuild.com/en/articles/t1738789-aproplan-how-to-use-the-form-template-builder-web-version>

III. User (web)

3.d. Create, Assign, and Plan a form

Create

To create a form, open the project and go to the relevant Space, then switch to the Forms view and click +. Choose a form category (Safety, Quality, or Environment) and select a template from either “My company” or “Public templates”. Import the selected form(s) to start.



III. User (web)

3.d. Create, Assign, and Plan a form

Assign

During creation, assign a person in charge of the form so they are responsible for completing and managing it. You can also add supporting documents such as plans, photos, or other relevant files.

Plan

Set a due date to schedule the form and ensure timely completion. You can also duplicate forms if multiple instances are needed, then confirm by clicking **Done** to generate them in the Space.

STEP 3 ON 3

Assign & schedule your inspections

Subject
Accidents at work and incidents reporting and survey form 57 / 255 Duplicate Delete

DD/MM/YYYY Do not repeat

Add document Select a category

Add users in charge Select a room

+ Add more forms...

Assign & schedule your inspections

Subject
Accidents at work and incidents reporting and survey form 57 / 255 Duplicate Delete

DD/MM/YYYY Do not repeat

Add document Select a category

Add users in charge Select a room

+ Add more forms...

III. User (web)

3.e. Fill in a form

To fill in a form, open the relevant project, navigate to the **Forms** section, select the form from the Space, and click **Fill Form**. Complete the form by answering each question within the different sections using the available input types. Once all required information is entered, finalise the form to generate a PDF report, which is automatically stored in the related project or Space.

Questions 1/1

Execution stage

Questions 1/1

11. Which stage of the works is this

Preparation Execution N/A

Finalise

By hovering over the question, a “+” will appear where you can add comments, attach documents, link existing points and create follow-up points.

CausewayOne

Projects

TEST PROJECT CAUSEWAY

Spaces

Points

Forms

Report templates

Documents

Participants

Dashboard

Settings

Application settings

Company

list test

5 Results

Sta...	Type	Num...	Categ...	Name
DONE		1.02		UK
WAITING...		1.01		Inci
TO DO		1.05		Fa
IN PROG...		1.04		Fa
TO DO		1.03		Fa

1.05 TO DO

Façades and Roofs - Glazing

Progress 0/1

Due date None

Category None

Room None

Type Quality

Conformity 0 non conformity

User(s) in charge None

Attach files from my documents

Drop files to upload or browse your desktop

Fill form

After filling in the form, click **Finalise** to review it. You can still edit your answers if needed. When ready, you can send the form by email and click **Finalise** again to generate the form report. The report will be available in the Documents section.

Façades and Roofs - Glazing

EDIT ANSWERS

Summary Of Façades and Roofs - Glazing

Quality Questions 1/1 0 non conformity 0 point

Execution stage

Questions 1/1

11. Which stage of the works is this

N/A

Send by email Finalise form

IV. User (mobile)

1. General navigation
2. Pre-load & Sync
3. Points
4. Reports
5. Forms
6. Sync

IV. User (mobile)

1. General navigation
 - a. Project screen
 - b. Synchronisation + best practices
 - c. Help & Support

IV. User (mobile)

1.a. Project screen

The Projects Overview screen provides an overview of all your projects, including those synchronised on your device and those available in the cloud. From this screen, you can create new projects, synchronise data, change the view layout, filter and sort projects, and access the main menu.



Install Aproplan the App Store or Google Play Store.

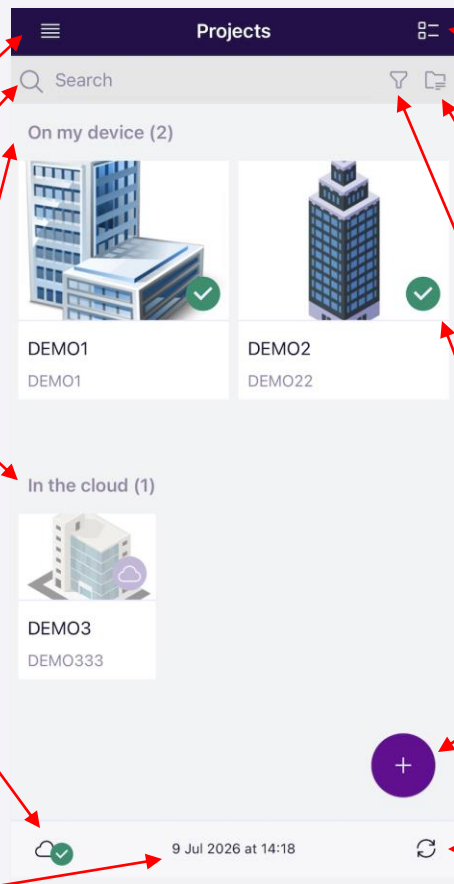
Tap on the menu icon to open the main menu.

Tap on the search bar to find projects.

Synchronised (loaded) projects, and projects in the cloud that have not yet been synchronised.

The green checkmark next to the cloud icon indicates that the projects on your device are synchronised. Tap it again to disable synchronisation.

The date indicates the last time the synchronisation was completed.



Tap on the view mode icon to switch the project overview to list view. Tap it again to switch back to thumbnail view.

To sort projects by name, code, or start and end date, tap on the sorting icon.

To filter between active and inactive projects, tap on the filter icon.

A green checkmark next to a project indicates that the project data has been fully synchronised.

Tap on the green + button to create a new project.

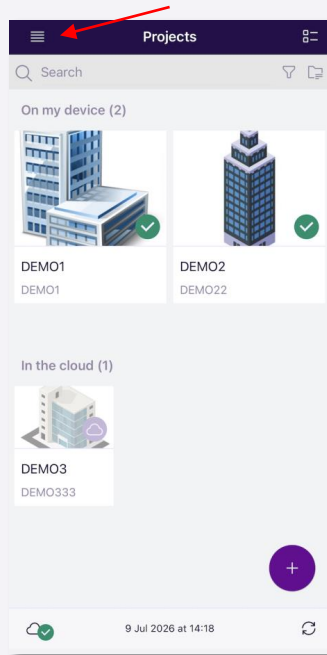
Tap on the synchronisation button to synchronise all data from your active projects.

IV. User (mobile)

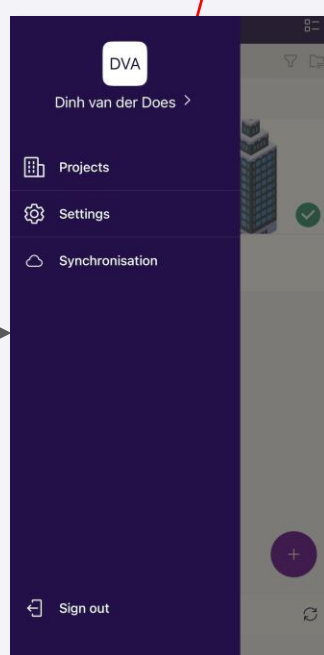
1.b. Synchronisation

Synchronisation in Aproplan ensures that all project data is kept up to date between your device and the cloud. When you synchronise, the latest changes, updates, and newly added information are downloaded to your device. This ensures that all users always work with the most recent project information, even when working across multiple devices or offline.

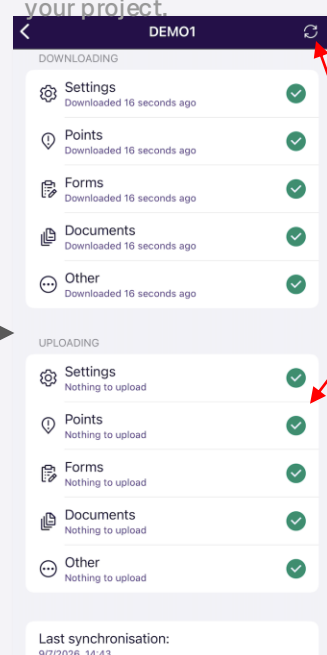
To synchronise the data of a single project, tap on the main menu icon.



In the main menu, tap on **Synchronisation**, and select your project.



Here, you will find an overview of the download and upload synchronisation statuses for each element in your project.



To resynchronise the project data, tap on the sync button

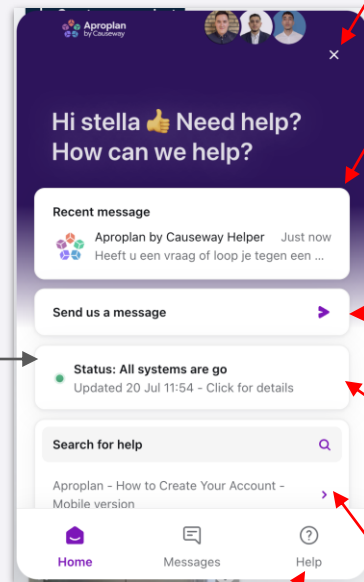
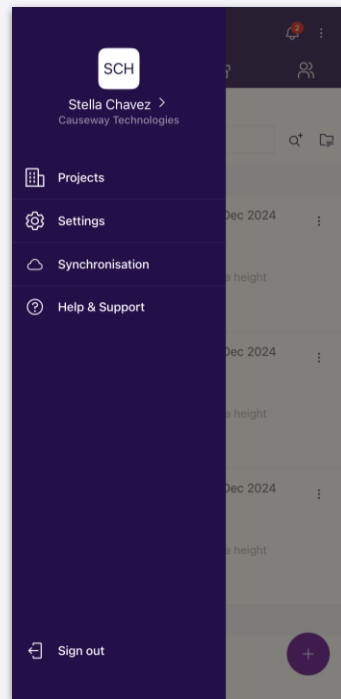
A green checkmark indicates that the data has been synchronised.

IV. User (mobile)

1.c. Help & Support

The **Help & Support** section gives you quick access to assistance and useful resources directly within the app. From here, you can contact our support team for any issue, question, request, or feedback. You can also check the current system status, access the FAQ Help Centre, and easily search for specific FAQ articles through the integrated search bar to quickly find answers and guidance.

To access Help & Support, open the main menu and tap on **Help & Support**.



Tap on the **X** icon to close the Help & Support section.

To view your existing conversations with our support team, tap on **Messages**.

Tap here to send a message to our support team and start a new conversation.

Here you can view the current system status. Tap on it for more details.

Tap on the search bar to quickly find a specific FAQ article.

To access the in-app FAQ Help Centre, tap on **Help**.

For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255568-aproplan-how-to-contact-the-aproplan-support-team-web-mobile-version>

IV. User (mobile)

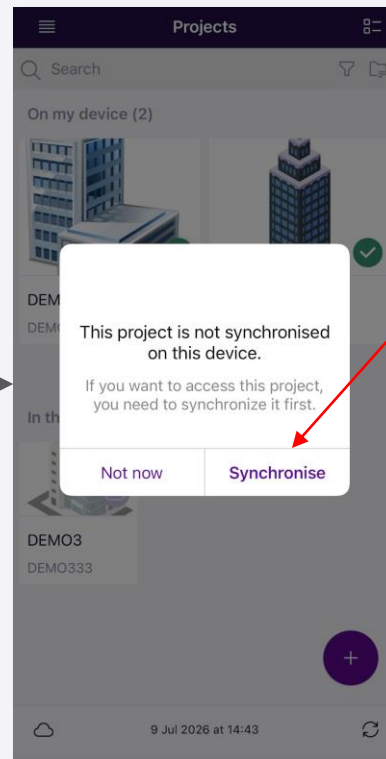
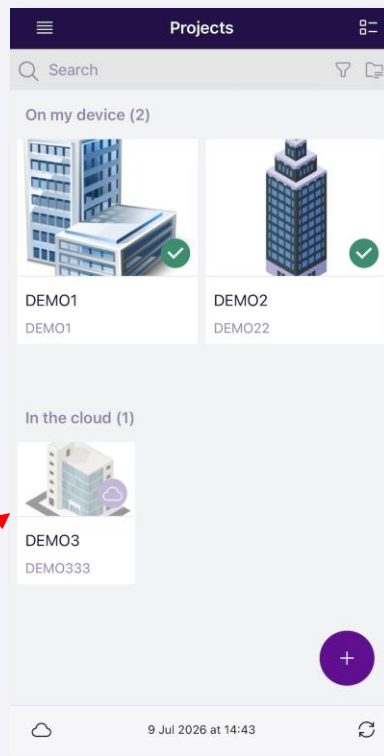
- 2. Pre-load & Sync
 - a. Load Project
 - b. Pre-load documents / Space

IV. User (mobile)

2.a. Load Project

Projects available in the cloud but not yet synchronised can be loaded into the application. Once the project data has been synchronised, you can access and work on the project directly from your mobile device. The best practice is to only synchronise projects you are actively working on, as this helps maintain optimal application performance.

To load a project, tap on a cloud-based project in your Project Overview.



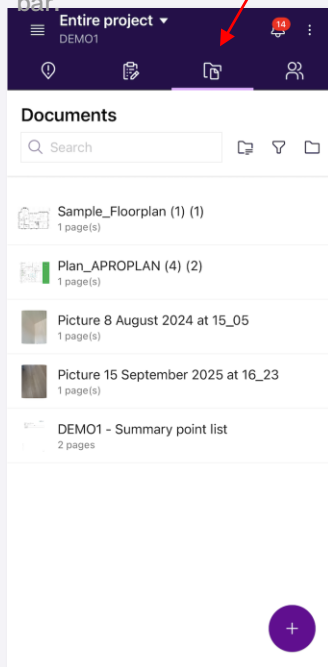
A pop-up will appear. Tap **Synchronise** to start synchronising the project. Once the project has been fully synchronised, it will appear with a green checkmark in your active Project Overview. It is recommended to keep the screen on with Aproplan in the foreground while the project is synchronising to avoid disruptions and to improve synchronisation speed.

IV. User (mobile)

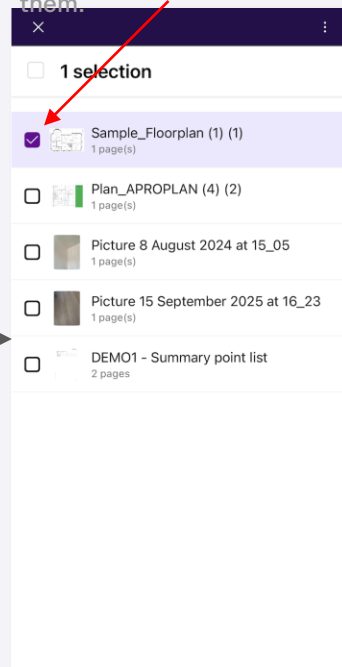
2.b. Pre-load documents / Space

In Aproplan, you can access your documents (such as plans and images) even without an internet or mobile data connection. By pre-loading documents, they are stored locally on your device, allowing you to view and use them offline at any time.

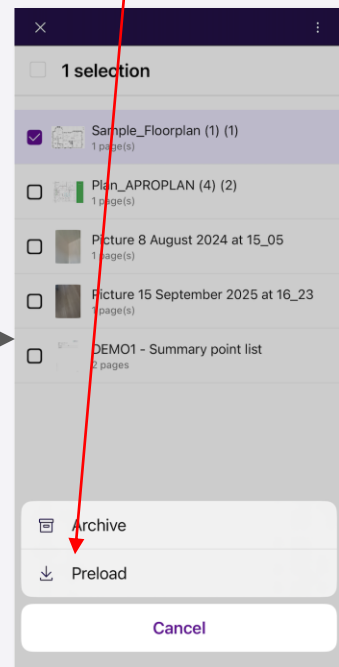
To preload documents, tap on the **Documents** section in the navigation bar.



Press and hold one or more documents to select them.



Tap on the three dots in the top-right corner and select **Preload** to download the documents to your device for offline access.



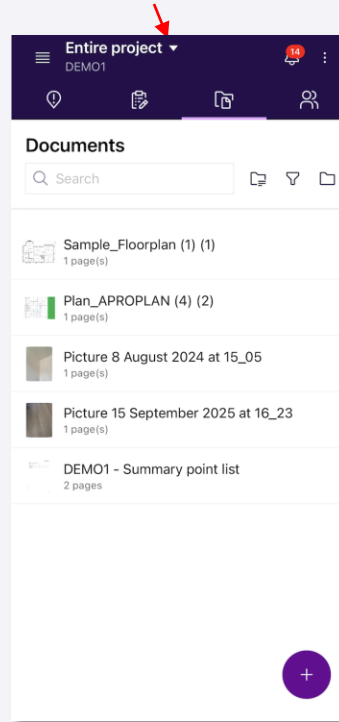
For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4255103-aproplan-how-to-preload-and-unload-documents-from-your-device-mobile-version>

IV. User (mobile)

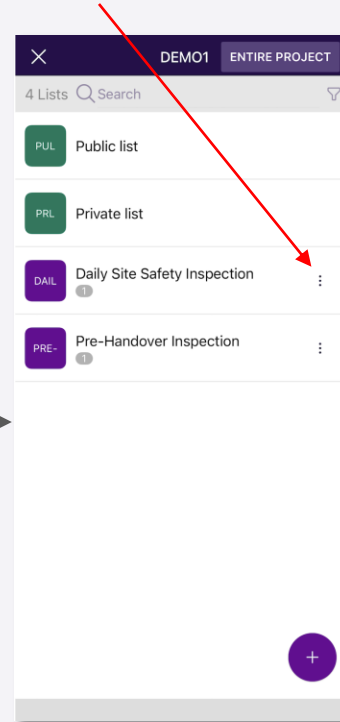
2.b. Pre-load documents / Space

Spaces can also be preloaded in Aproplan to make their data available offline. By preloading a Space, its related information is stored locally on your device, allowing you to continue working without an internet or mobile data connection.

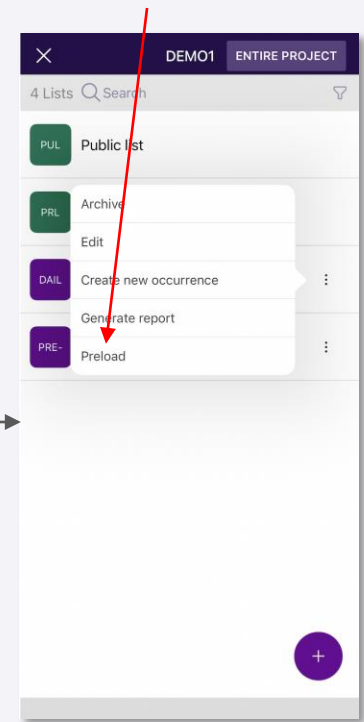
To preload a Space, tap on the Space menu in the top-left corner.



Once the Space menu opens, tap on the three dots to the right of the relevant Space.



Tap on **Preload** to download the Space for offline access.



IV. User (mobile)

3. Points

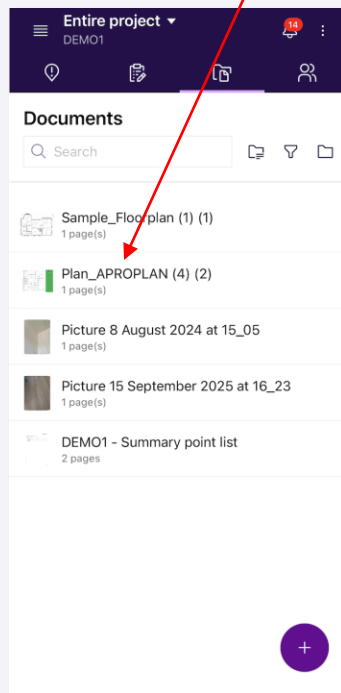
- a. Create point on a plan
- b. Create point
- c. Save info from previous points
- d. Change status, add comments

IV. User (mobile)

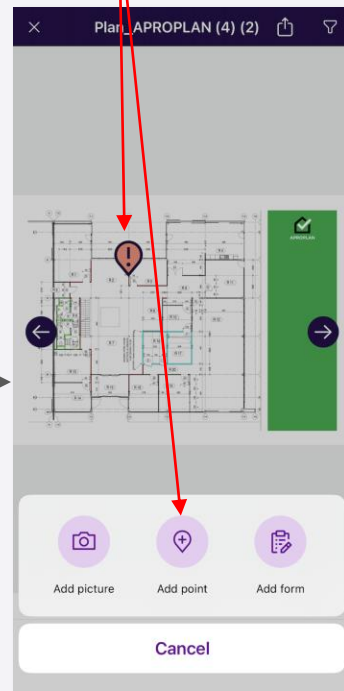
3.a. Create a point on a plan

A point can be created directly on a plan to highlight an issue, task, or observation in a specific location. It is linked to both the plan and the project Space, allowing you to track, assign, and follow up on items in a clear visual context.

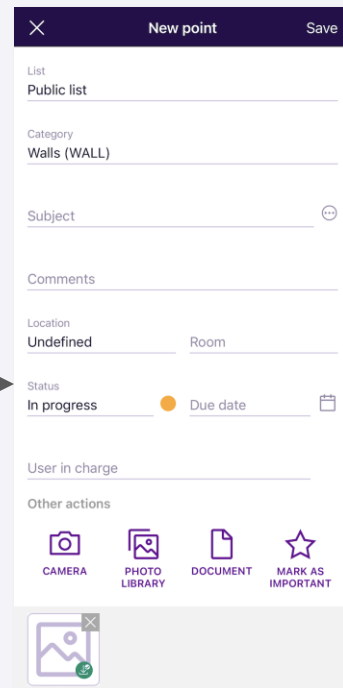
To create a point on a plan, select the relevant Space and open the plan from the Documents section.



After opening the plan, tap on the location where you want to place the point marker, then tap **Add Point**.



Fill in the point details and tap **Save** to create the point on the plan.

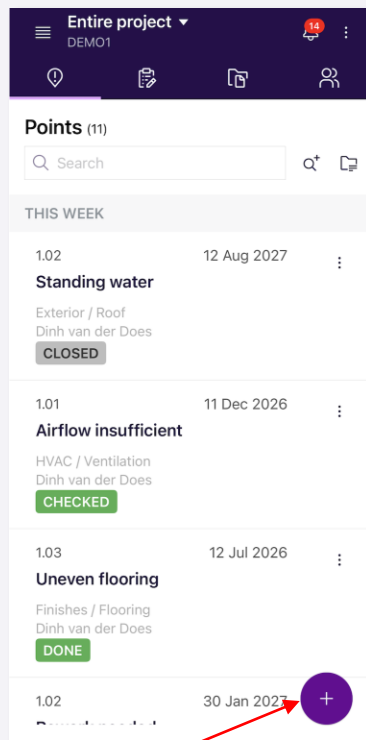


For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/14322891-aproplan-how-to-add-a-point-on-a-plan-mobile-version>

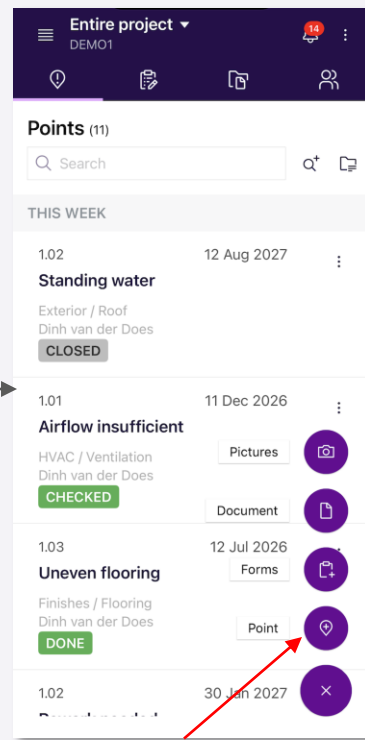
IV. User (mobile)

3.b. Create point

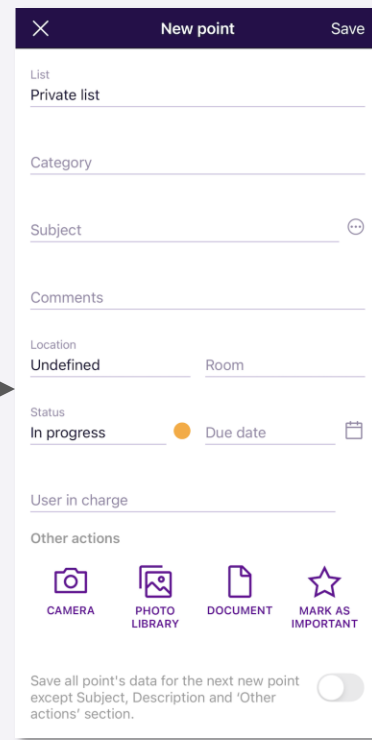
A point can also be created directly within a Space without linking it to a plan. This allows you to log tasks, issues, or observations in a structured way at Space level, where they can be tracked, assigned, and followed up independently of a specific location on a plan.



To create a point, select the Space you want to work in, tap on the **Points** section tab, and then tap on the green + button.



A menu will open. Tap on **Point** to start creating your point.



Fill in the point details, add attachments and/or comments if necessary, and tap **Save** to create the point.

IV. User (mobile)

3.b. Create point

The screenshot shows a mobile app interface for creating a new point. The form is titled 'New point' and has a 'Save' button at the top right. The form fields are as follows:

- List:** A dropdown menu with 'Private list' selected.
- Category:** A text input field.
- Subject:** A text input field with a three-dot menu icon to its right.
- Comments:** A text input field.
- Location:** A text input field with 'Undefined' and 'Room' as options.
- Status:** A dropdown menu with 'In progress' selected, a yellow dot indicator, and a 'Due date' field with a calendar icon.
- User in charge:** A text input field.
- Other actions:** A section with four icons: 'CAMERA', 'PHOTO LIBRARY', 'DOCUMENT', and 'MARK AS IMPORTANT'.
- Footer:** A toggle switch labeled 'Save all point's data for the next new point except Subject, Description and 'Other actions' section.'.

Red lines connect various text annotations to specific parts of the form.

Cancel point creation

Save point details to create point

Enter a brief description as subject

Select a previously used subject

Select the Space where you want to create the point when creating a point

Categorise the point

Improve accuracy by specifying the room, floor, or other location details

Add comments to provide additional context or updates

Add a due date (note: this will not trigger reminders or emails)

Define the exact position (floor, wall, or ceiling)
Indicate the current stage of the point

Define the status of the point

Marking the point as important will add a star next to the point in the Space

Assign responsibility to a person, company, or role

Add photos by taking a picture or selecting one from the mobile gallery

Attach documents or images from the project structure

IV. User (mobile)

3.c. Save info from previous points

When creating a new point, you can reuse information from previous points. It is possible to save and carry over most point details to speed up the creation process, while fields such as subject, description, and other actions are not included and must be entered manually for each new point.

×

New point

Save

List

Private list

Category

Walls (WALL)

Subject

Incorrect paint finish

Comments

Location

Undefined

Room

Status

In progress

Due date

User in charge

Other actions

CAMERA

PHOTO LIBRARY

DOCUMENT

MARK AS IMPORTANT

Save all point's data for the next new point except Subject, Description and 'Other actions' section.

Tap on the slider at the bottom of the point details to save the filled-in point data for the next new point creation.

IV. User (mobile)

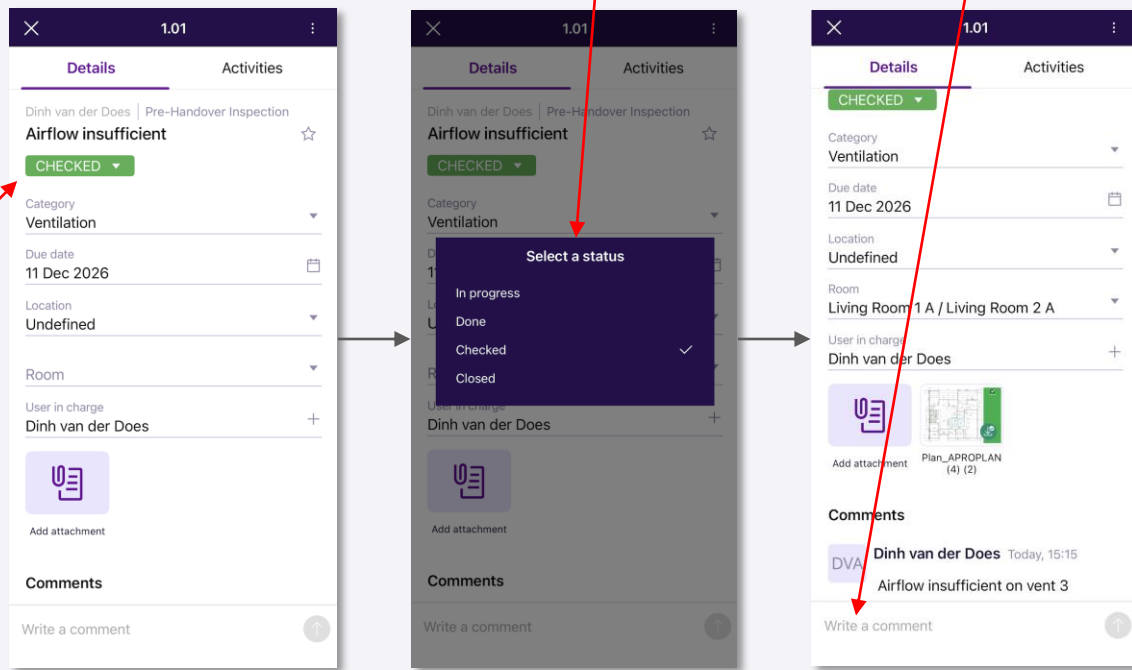
3.d. Change status, add comments

Points can be updated throughout their lifecycle by changing their status and adding comments. Changing the status helps track the progress of a point, while comments allow users to provide updates, share information, or communicate additional details related to the point.

When a point is open, you can change its status by tapping on the status in the top-left corner of the point details.

A new window will pop up where you can choose the desired status.

To add a comment to the point, tap on **Write a comment**. The comment will appear directly at the bottom under the point details.



IV. User (mobile)

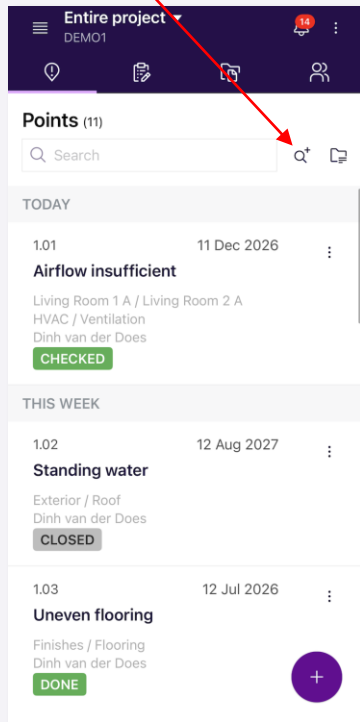
- 4. Reports
 - a. Use filters
 - b. Choose template
 - c. Generate report

IV. User (mobile)

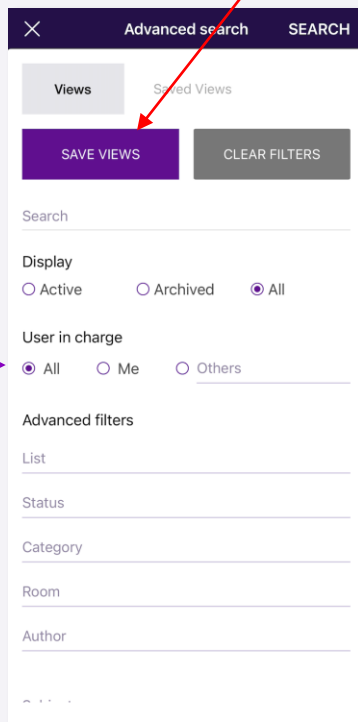
4.a. Use filters

Points in Aproplan can be organised using **sorting**, and **filters** to help you quickly structure and find the information you need. These tools allow you to customise your point overview and focus on relevant data within a project. Before generating a point report, you can sort and filter the points list to quickly find the required points.

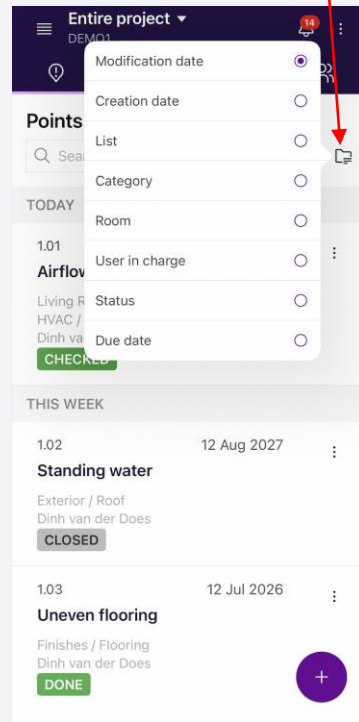
To use advanced search and filters, tap on the magnifying glass icon in the top-right corner.



In advanced search, you can set your criteria and then tap on **Save Views** to save the selected parameters.



To sort points, tap on the folder icon in the top-right corner.



For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4259020-aproplan-how-to-group-and-filter-points-mobile-version>

IV. User (mobile)

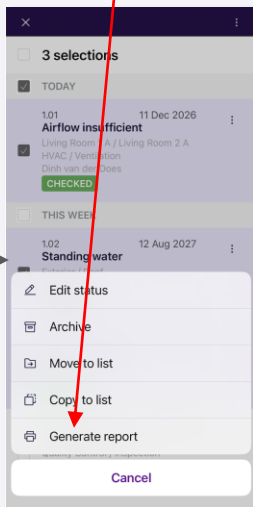
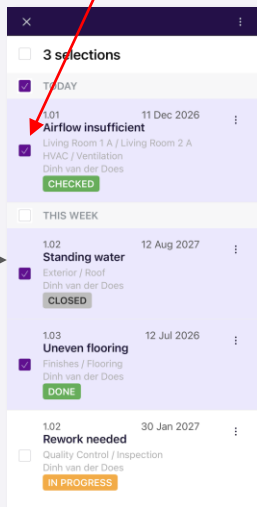
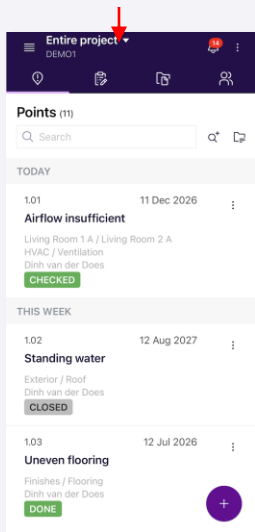
4.b. Choose template

Report templates in Aproplan are predefined formats used to generate consistent and structured reports from your project data. They ensure that all relevant information is presented in a clear and standardised way for sharing and documentation purposes.

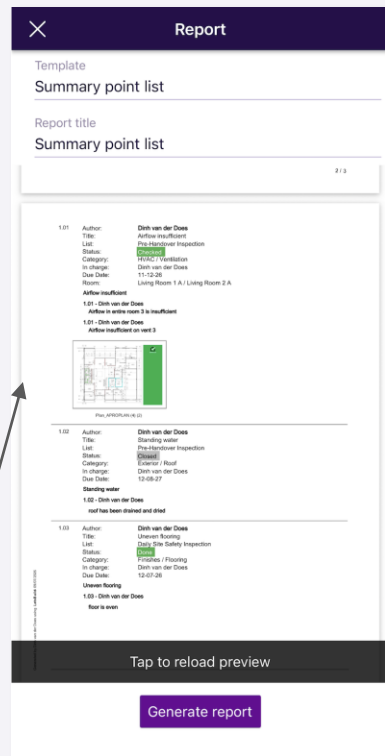
To select a report template (e.g. when creating a point report), open your Space in the Points section.

Press and hold the points you want to include in the report.

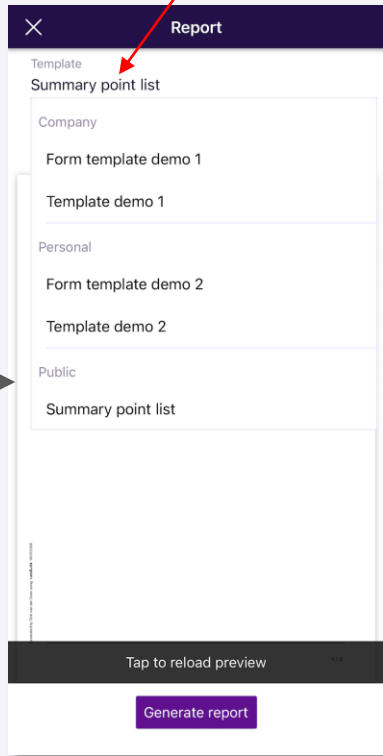
Tap the three dots in the top-right corner and select **Generate report** from the menu at the bottom.



A new window will open where you can choose a report template, name the report, and preview the report content.



At the top, tap **Template** and select your desired template from the drop-down menu.



IV. User (mobile)

4.c. Generate report

After naming the report, selecting the template, and previewing the report, tap on **Generate report** to create it.

Report

Template

Summary point list

Report title

Summary point list

1.01: Aukton: Dink van der Does
Titel: Aukton resultaat
Lid: Dink van der Does
Status: In de wacht
Categorie: Dink van der Does
Din Dink: 11-12-20
Waarom: Living Room 1.A; Living Room 2.A

Aukton resultaat

1.01: Dink van der Does
Aukton in welke vorm is de Aukton?

1.01: Dink van der Does
Aukton resultaat is niet 3

1.02: Aukton: Dink van der Does
Titel: Aukton resultaat
Lid: Dink van der Does
Status: In de wacht
Categorie: Dink van der Does
Din Dink: 12-08-27
Waarom: niet

1.02: Dink van der Does
Aukton in welke vorm is de Aukton?

1.02: Dink van der Does
Aukton resultaat is niet 3

1.03: Aukton: Dink van der Does
Titel: Aukton resultaat
Lid: Dink van der Does
Status: In de wacht
Categorie: Dink van der Does
Din Dink: 12-08-27
Waarom: niet

1.03: Dink van der Does
Aukton in welke vorm is de Aukton?

1.03: Dink van der Does
Aukton resultaat is niet 3

Tap to reload preview

Generate report

Generate report and save into Documents

Just Save

Email the report as a PDF attachment

Attach report to an email

A new window will open where you can choose to either generate the report and save it in the Aproplan Documents section, or generate the report and send it by email as a PDF file.

Send report

SEND

From
dinh.vanderdoes@letsbuild.com

Subject
Summary point list

Send to
User in charge, Dinh van der Does

Generate a report per user in charge ☒

Email body
Hello,
Please find attached my report entitled 'Summary point list' containing 3 point(s).
Kind regards,
Dinh van der Does

PDF
Summary point list.PDF

Tap on the slider to generate a separate report per user in charge of the points included in this report when choosing to send the report by email.

IV. User (mobile)

5. Forms

- a. Plan form
- b. Fill-in form
- c. Signature
- d. Finalise form

IV. User (mobile)

5.a. Plan form

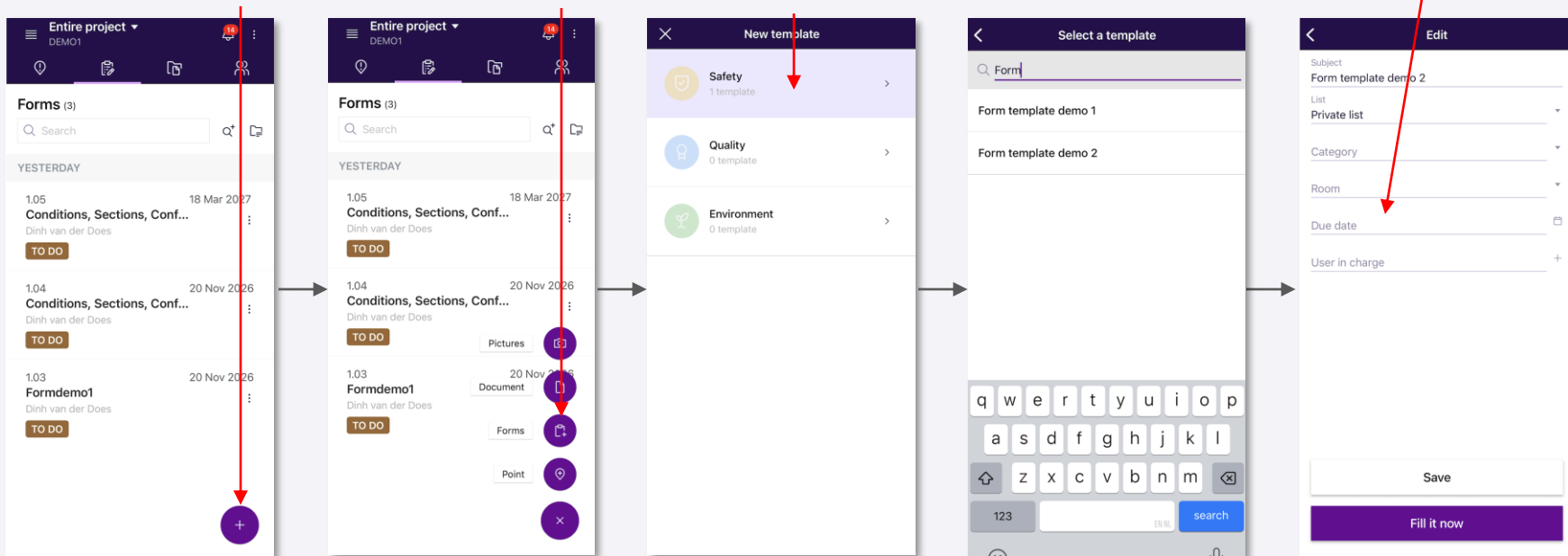
To plan a form, open the **Forms** section tab and tap on the green + button.

A menu will appear. Tap on **Forms** to create a new form.

A new window will open where you can choose the form type (Safety, Quality, or Environment).

Use the search bar at the top to find the template you want to use.

Fill in the form details, then set the due date and assign a user in charge.



For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/6043323-aproplan-how-to-prepare-and-perform-your-quality-safety-inspection-web-mobile-version>

IV. User (mobile)

5.b. Fill-in form and adding attachments

After filling in the form details and planning the form, tap **Fill it now** to start completing the form.

Go through each question and enter the required information.

You can add comments, attach files, link existing points, create new points, take pictures directly, or upload documents and images where needed by tapping the + button next to the question.

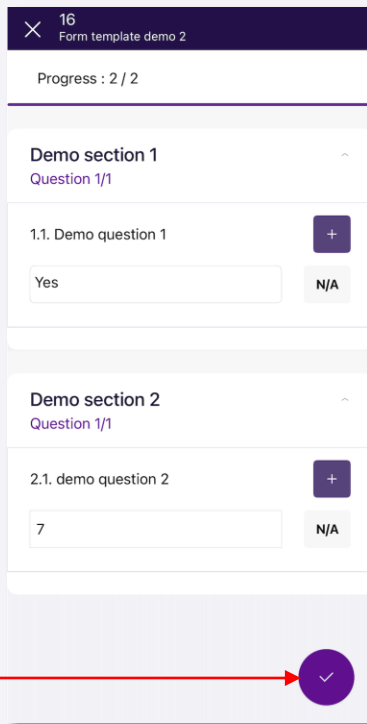
For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/4277722-aproplan-how-to-complete-a-form-mobile-version>

IV. User (mobile)

5.c. Signature

Signatures in forms are used to confirm and validate that the information provided in a form has been reviewed and approved by the responsible person. They add accountability and formal approval to inspections and other documented processes within the project.

Once all information has been filled in, tap the green check mark in the bottom-right corner to review the form.



16
Form template demo 2

Progress : 2 / 2

Demo section 1
Question 1/1

1.1. Demo question 1

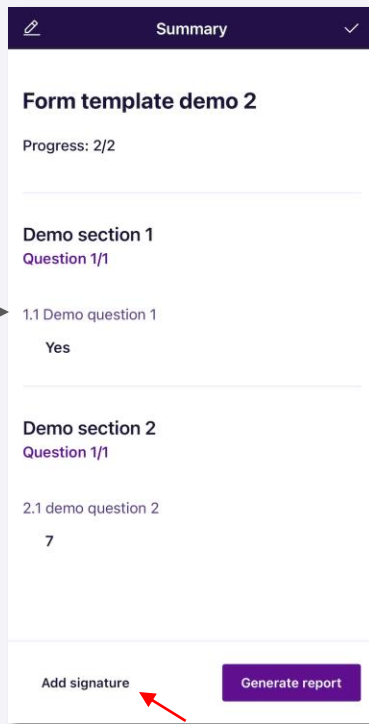
Yes N/A

Demo section 2
Question 1/1

2.1. demo question 2

7 N/A

Green checkmark icon in the bottom right corner.



Summary

Form template demo 2

Progress: 2/2

Demo section 1
Question 1/1

1.1 Demo question 1

Yes

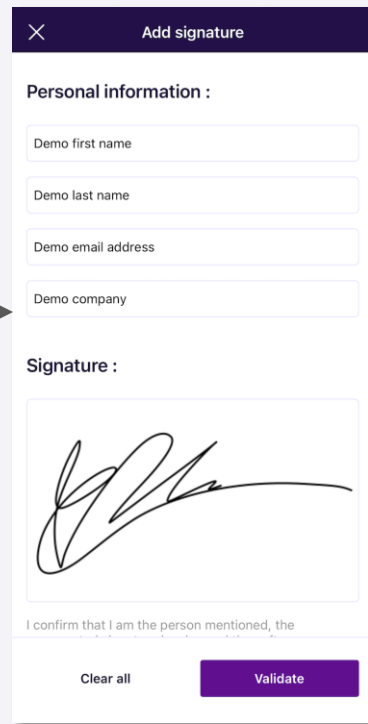
Demo section 2
Question 1/1

2.1 demo question 2

7

Add signature Generate report

Tap on **Add signature** in the bottom-left corner to add a signature to your form.



Add signature

Personal information :

Demo first name

Demo last name

Demo email address

Demo company

Signature :

Handwritten signature

I confirm that I am the person mentioned, the

Clear all Validate

A new window will open where you need to fill in the required **signatory** information, such as first name, last name, email, and company. Then tap on the signature field to sign the form. Tap on **Validate** after signing the form.

IV. User (mobile)

5.d. Finalise form

Tap on the **X** if you wish to remove a signature

After adding your signature, you can tap **Add signature** to add an additional signature to the form.

Summary

1.1 Demo question 1

Yes

Demo section 2

Question 1/1

2.1 demo question 2

7

Signatures:

Demo first name
Demo last name
Demo company

signed on 9 Jul 2026 at 16:52

Add signature

Generate report

Once you have finished reviewing the form summary, tap on **Generate report** to finalise the form and start generating the report.

Report creation

You're almost done !

Choose whether to save or send your report.
Note that you will not be able to add new signatures afterwards.

Save in my documents

Save and send by mail

SHOW PREVIEW

You can choose to save the report in the Aproplan Documents section, or save and send it by email.

We're done !

Once the report has been generated, a green checkmark will appear.

IV. User (mobile)

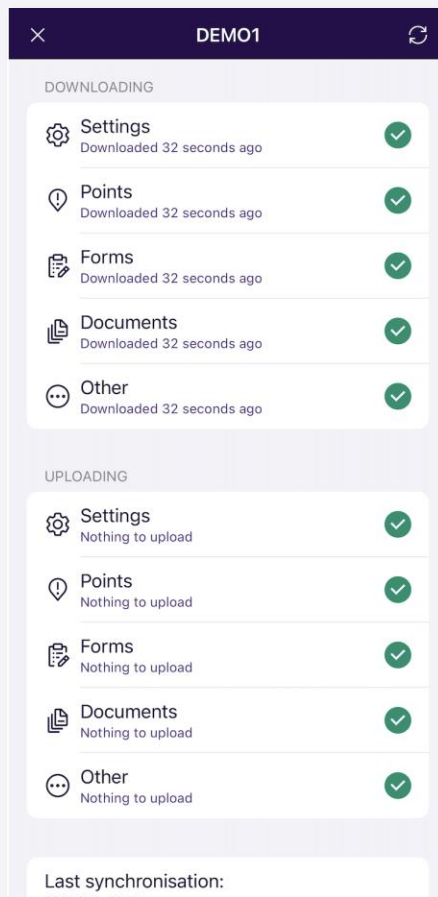
6. Sync

a. Tips & tricks for syncing

IV. User (mobile)

6.a. Tips & tricks for syncing

- Keep the Aproplan application updated to the latest version to ensure optimal stability and performance.
- During synchronisation, keep the app open in the foreground with the screen turned on to avoid interruptions.
- Ensure synchronisation is fully completed before generating a point report or finalising a form, otherwise an error message may occur.
- If the network is unstable, it is recommended to work offline and synchronise later on a stable connection.
- If issues occur, try restarting the app or logging out and logging back in before attempting to synchronise again.
- Never delete the app while a synchronisation is still in progress.



For more information, visit our FAQ article: <https://help.letsbuild.com/en/articles/9800212-aproplan-synchronisation-options-mobile-version>

V. Conclusion

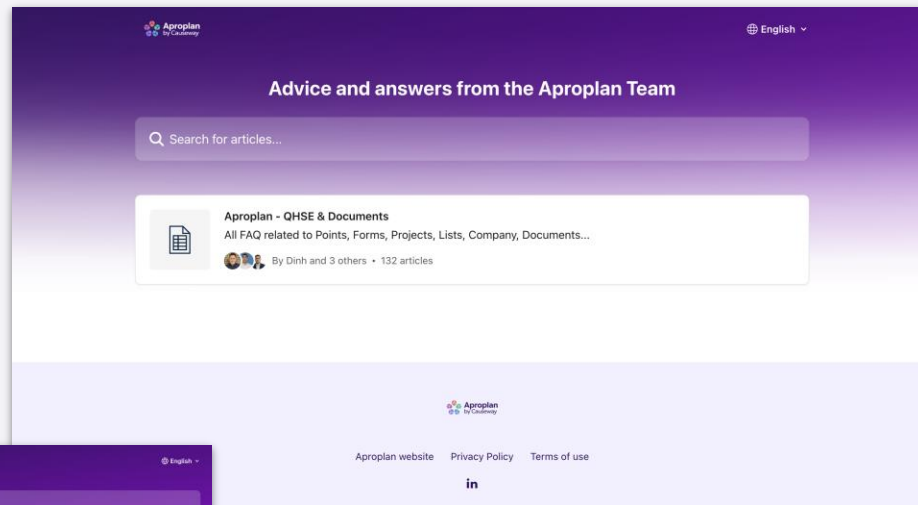
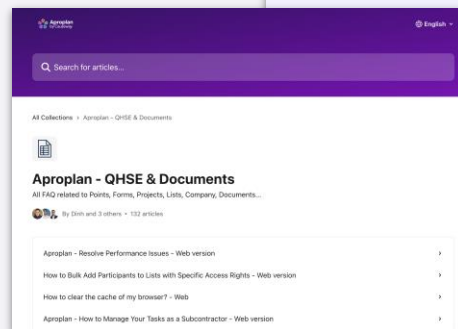
1. FAQ
2. Support
3. Get in touch with the Aproplan Team

V. Conclusion

1. FAQ

Find answers to your questions in the Aproplan FAQ Help Centre by visiting the link below, where you can quickly access helpful articles, guides, and solutions to common issues.

<https://help.letsbuild.com/en/>



V. Conclusion

2. Support

Need help? Our support team is here to assist you. You can reach us at support@aproplan.com for any questions, issues, requests, or feedback, or start a conversation directly via the in-app chat on the web and mobile application for fast and convenient support.

