

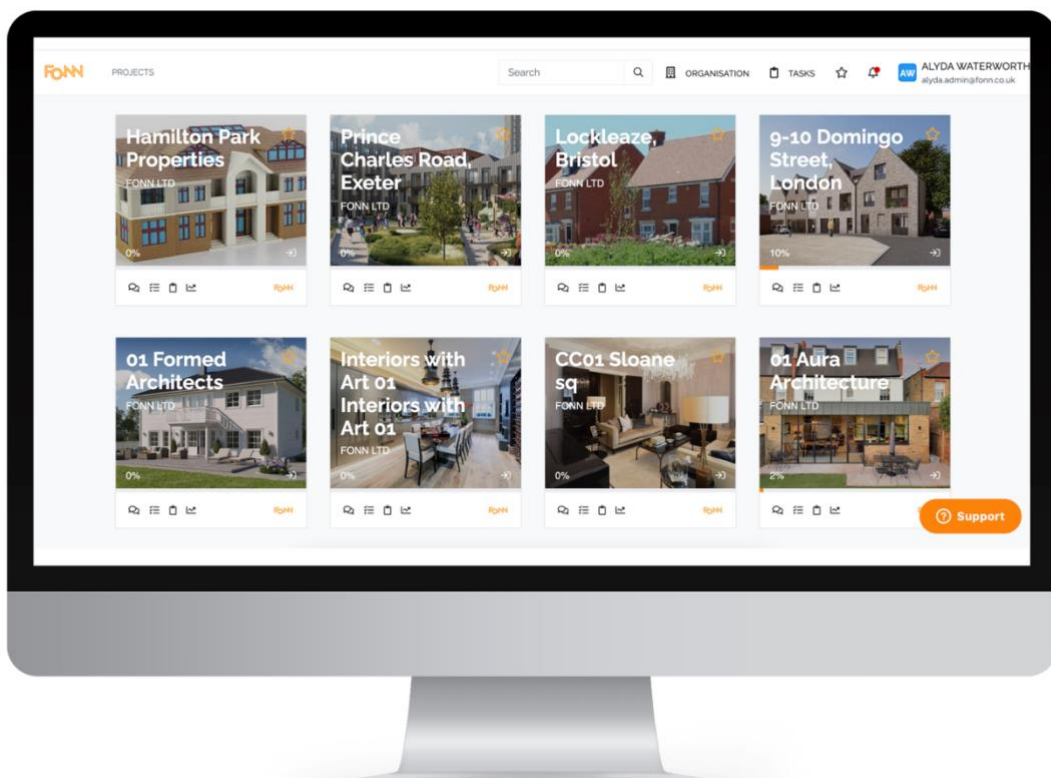
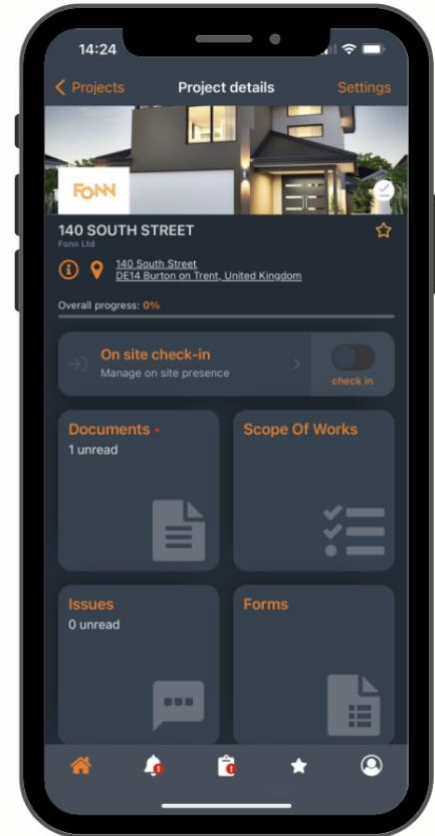


# FOUN

## Training Guide

Desktop Manual

1. Introduction - What is Fonn?
2. Getting started with Fonn
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4. Project Features: **Documents**
5. Project Features: **Issues**
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# 1. Introduction – What is Fonn?

**Fonn is a site management tool for construction projects, with inclusive usability for all tech-skill-levels.**



### User Friendly

For builders, by builders. We develop user friendly and initiative features, based on user feedback.



### Push-notifications

Project members are instantly notified via push notifications upon all changes in the project or when deadlines are getting close.



### Document Management

All documents available for all users. No more revision handling by email. Share plans, drawings BIM-files etc.



### Daily Reports

Auto-populate all data from on-site communication in one daily and weekly report and include any other desired updates or notes regarding progress made each day.



### Access Management

All information is distributed on a need-to-know basis. To keep focus, users only see what they need to see.



### 24/7 Support

You'll have your own dedicated Customer Success Manager.



### RFI

Handle all RFI communication in one place.



### Submittals

Handle all communication regarding submittals in one place. Reduce conversation channels and liability exposure.



### Unlimited Users

Our price is based on the size of your company. We include unlimited projects, unlimited users and unlimited storage at no extra cost.



### Forms

Create forms to keep your important information consistent and documented across all work sites.



### Direct Communication

All contributors may communicate directly while the project manager monitors everything.

## 2. Getting started with Fonn

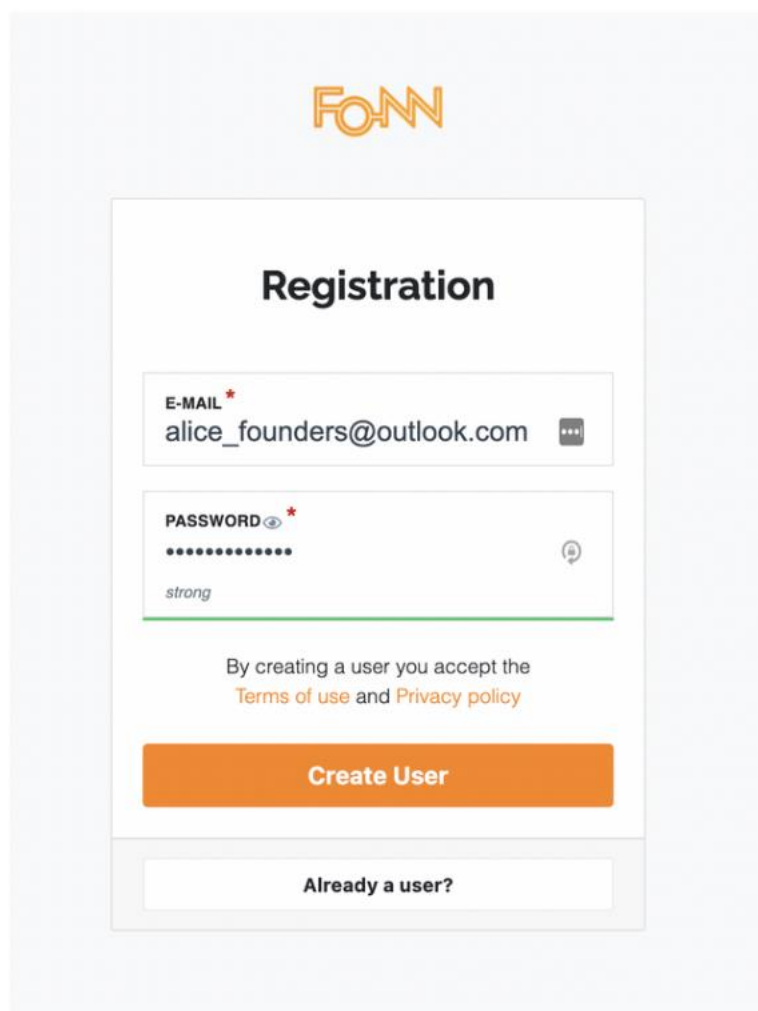
Getting started with Fonn is easy.

You simply need to complete the registration process for a free account. Your Project Manager or Supervisor will invite you into a project, you accept the invitation and you're ready to start.

If you do not have an account with Fonn already, follow the below steps to complete the account registration process:

1. Go to <https://app.fonn.io/register>
2. Enter your email address\*
3. Create a password\*
4. Click 'Create User'

If you already have an account created, click 'Already a User?' and log in.



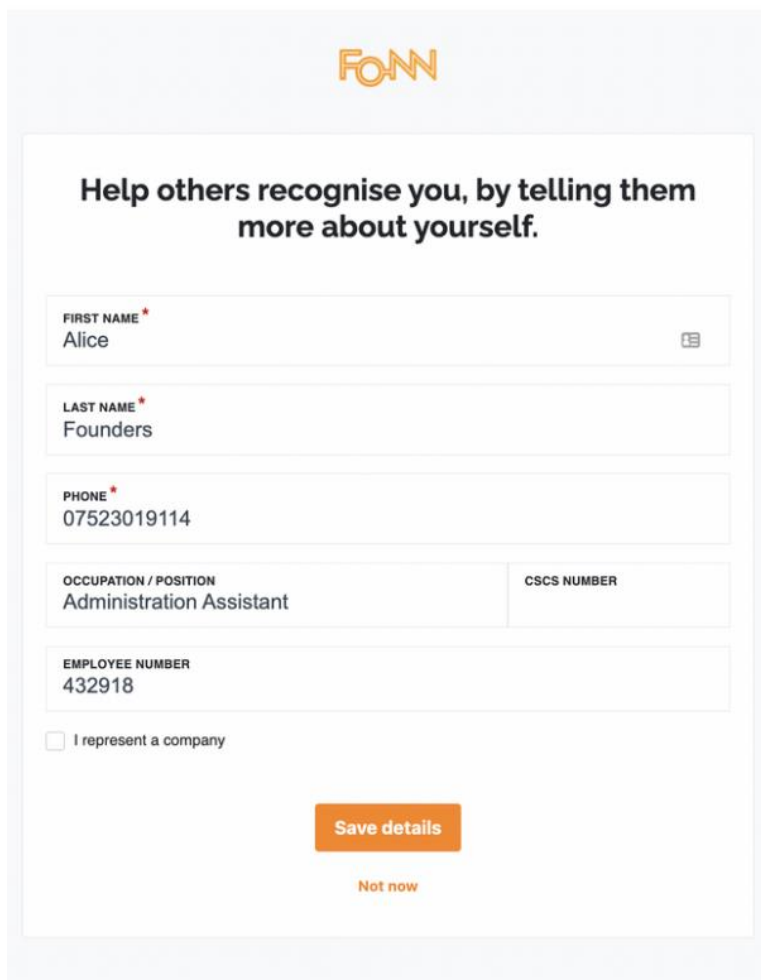
The screenshot shows the Fonn registration interface. At the top center is the Fonn logo. Below it is a white registration form with the title "Registration". The form contains two input fields: "E-MAIL\*" with the value "alice\_founders@outlook.com" and a dropdown menu icon, and "PASSWORD\*" with a strength indicator showing "strong" and a password strength icon. Below the password field is a green horizontal line. Underneath the form, there is a line of text: "By creating a user you accept the Terms of use and Privacy policy". At the bottom of the form is a large orange button labeled "Create User". Below the main form is a separate white box with the text "Already a user?".

## 2. Getting started with Fonn

Next, you will be asked to fill in some additional details about yourself.

Fields marked with a red asterisk \* are mandatory.

1. First Name\*
2. Last Name\*
3. Contact Number\*
4. Occupation/Position
5. CSCS Number
6. Employee Number
7. If you represent a company, tick the box and fill in the additional fields
8. Click Save Details



The screenshot shows a registration form with the Fonn logo at the top. The heading reads: "Help others recognise you, by telling them more about yourself." The form contains the following fields:

- FIRST NAME\***: Alice
- LAST NAME\***: Founders
- PHONE\***: 07523019114
- OCCUPATION / POSITION**: Administration Assistant
- CSCS NUMBER**: (empty)
- EMPLOYEE NUMBER**: 432918
- I represent a company

At the bottom of the form, there are two buttons: "Save details" (orange) and "Not now" (light orange).

I represent a company

**COMPANY NAME\***  
Construction Ltd

**STREET ADDRESS**

**CITY**  
London

**POSTCODE**

**TAX ID**

**COUNTRY**  
United Kingdom

## 2. Getting started with Fonn

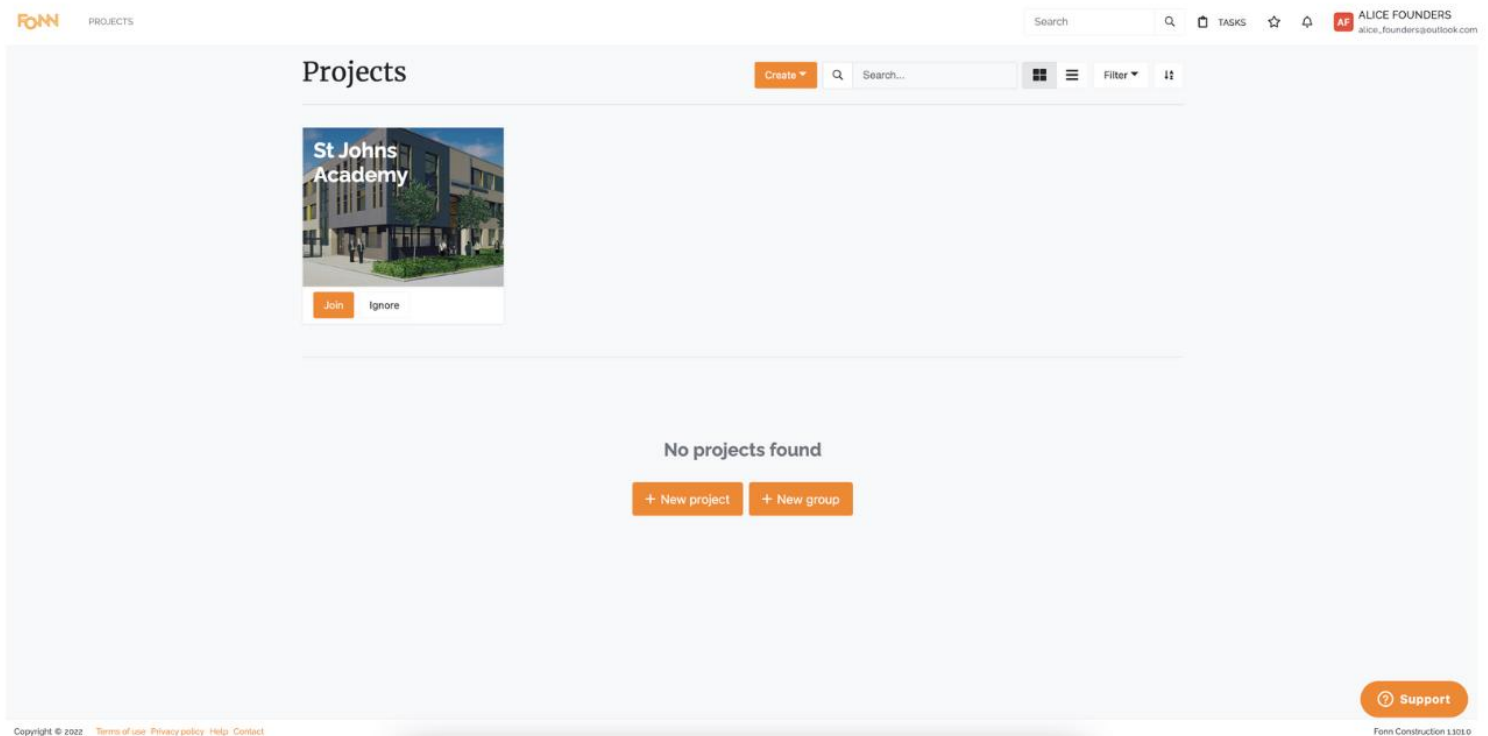
Your account is now created and you will be directed to your Project Dashboard.

The top half of the screen will show you any projects that you are invited to.

To accept an invitation to a project:

1. Click the  button

You are now a member of a project and ready to learn about the project's features.



### 3. Project Features - Overview

The Overview screen will show you information about the project, including name and address. We also show a summary of recent changes within the project.

You will see updated information including:

- **Overall progress %**

Percentage % is calculated based on items completed in the Scope of Works module.

- **Pending Variations**

Number of variations currently awaiting approval/rejection from Client/Project Manager or Supervisor.

- **Completed/Total Scope of Works Items**

Number of completed Scope of Works items compared to total number of Scope of Works item.

- **Project Members**

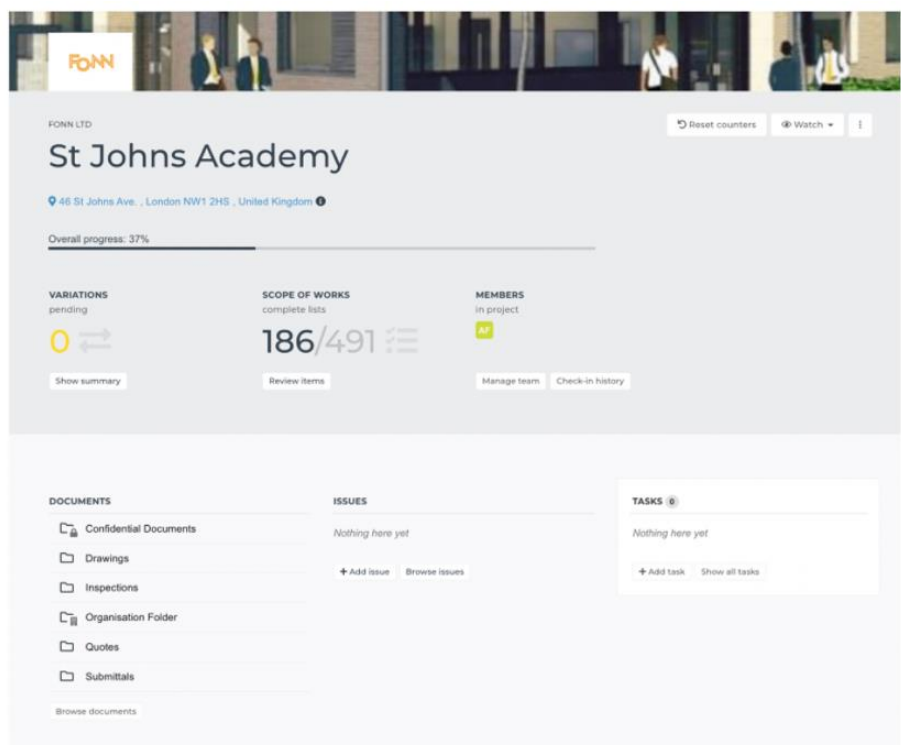
Initials of current members on the project – hover over to view full names.

- **Issues** Recently added issues will appear here as shortcuts.

- **Tasks** Recently added tasks will appear here as shortcuts.

- **Documents**

Snapshot of document folders from the project including red dot symbols if new documents have been uploaded that are currently unread

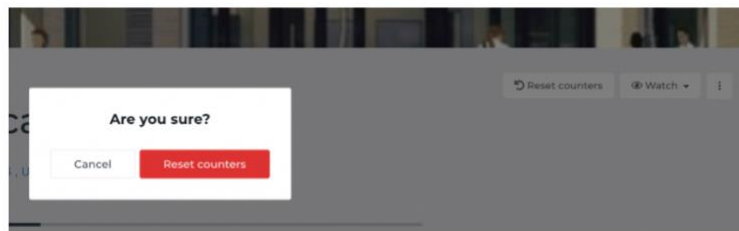


### 3. Project Features - Overview

There are some other features on the Overview screen that you may find useful.

- **Reset Counters**

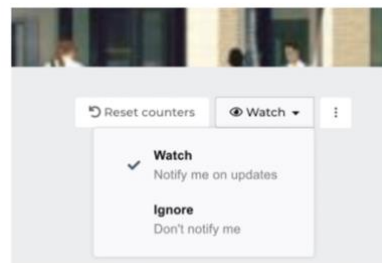
This function will reset the red dot/unread indicators within a project. This can come in handy if you joined a project late and have lots unread documents to catch up



- **Watch**

If 'Watch' is ticked: you will receive push-notifications for this project

If 'Ignore' is ticked: you will not receive push-notifications for this project

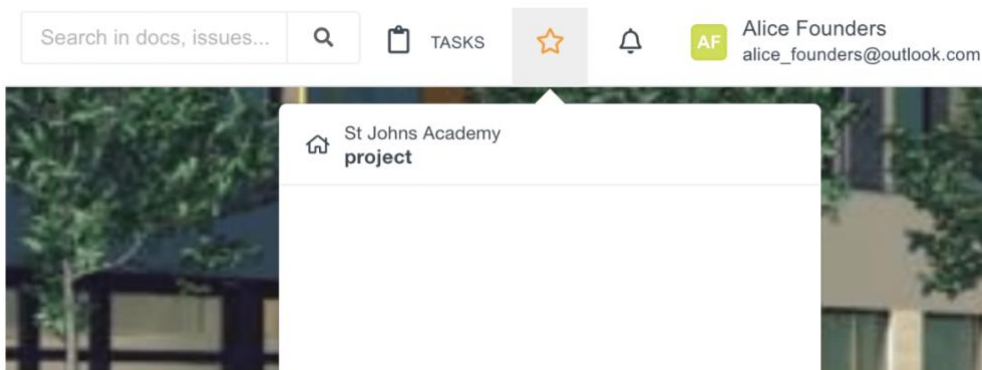
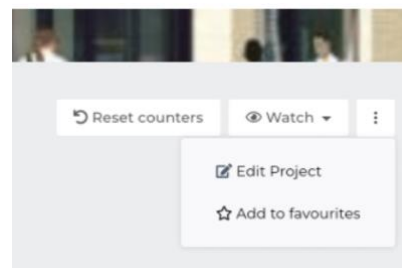


- **3 dots**

When you see these 3 vertical dots on screen, this indicates further actions.

Here you can edit the project (if you have the correct permissions)

You can also add this project to your favourites as a shortcut.





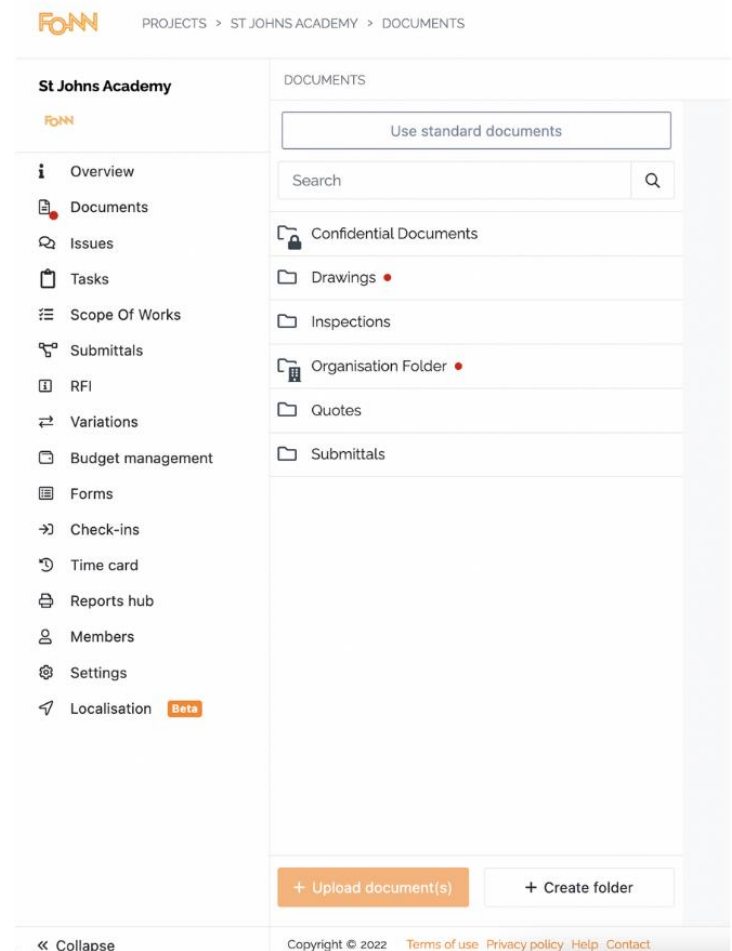
## 4. Project Features - Documents

The Documents feature is a very important area on the project. This is where all files relating to the project are stored.







You will see several folders in a list view - these will have been created by an Admin user during the setup of Fonn.

The red dot icons you see against the folders will indicate that a new document has been uploaded or revised.

To read the file, simply click and follow the red dot trail through the folders.



### Types of Folders

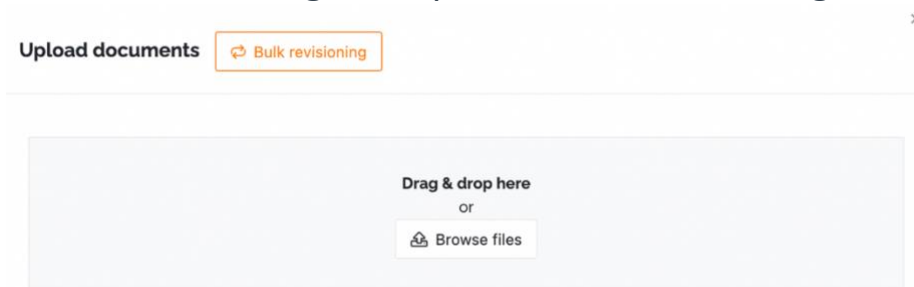
-  **Default Folder** – These automatically added to a project from a Folder Template (folder templates are created by admin users during the setup of Fonn)
-  **Private Folder** – When creating a new folder, you can decide whether it should be public or private. If you make the folder private it can only be accessed by you, Project Managers and Supervisors. You can give additional members access if you need to.
-  **Public Folder** – If you choose to create a public folder, it will be visible to all project members. Everyone with a role that lets them upload documents will be able to upload into this folder.
-  **Organisational Folder** – Everyone in the project has access to this folder, but only admin users can add documents. Admins can add documents by simply going into any project and uploading files from there. The files will be available in the same spot across all projects.
-  **Submittals Folder** – Submittals are stored in this folder unless a different folder is added during creation of the Submittal.
-  **Forms (PDF) Folder** – This is a public folder where Forms are created and stored. All members except clients can create Forms within the folder. Spectators cannot access this folder.

## 4. Project Features - Documents

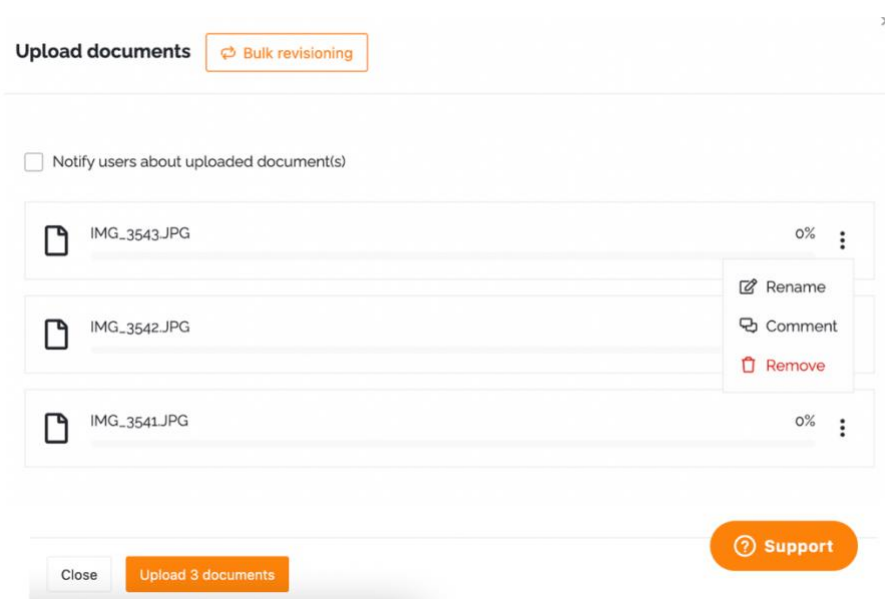
### Uploading Documents

To upload documents into the folders, follow the below steps:

1. Click the **+ Upload document(s)** button
2. Click to browse files or drag & drop the file into the designated area



3. You will then see the files on-screen ready to upload



4. To notify users on the project about the files you are uploading, tick the following option or leave it blank to upload silently
5. The 3 dots on the right-hand side will give you additional options before the upload begins.
6. When ready, click Upload documents at the bottom of the screen.

As the files are uploaded, the progress markers will turn green and show 100%.}

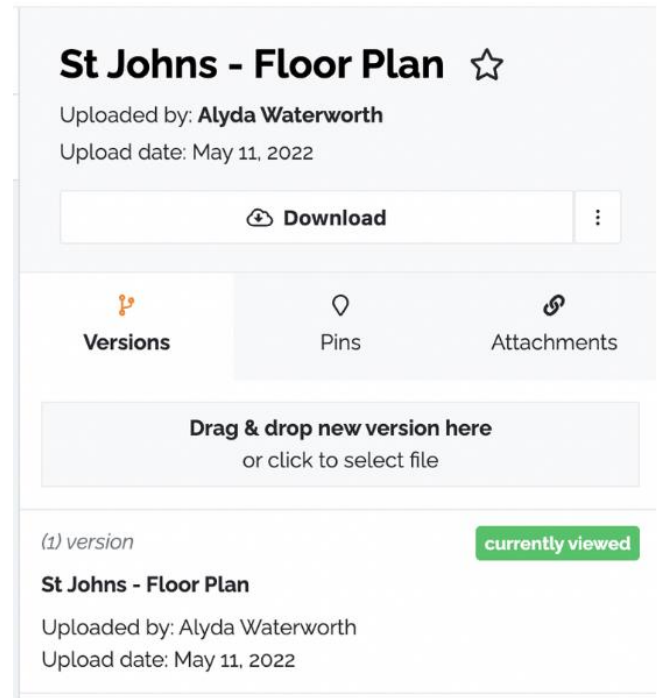


## 4. Project Features - Documents

Once all files are successfully uploaded, the folder will open showing you the new documents.

When viewing a document, you will see several different options to aid you.

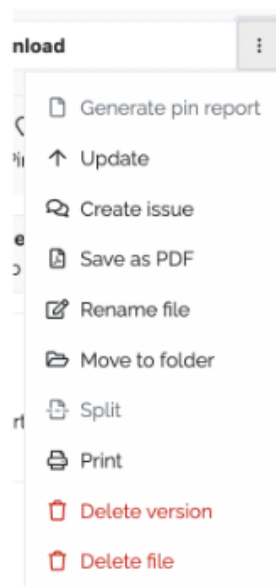
On the top right-hand corner, you will see the document name followed by the information of the user who uploaded the document and the date it was uploaded.



A download button is visible for you to download the file to your desktop. Again, the 3 dots will give you additional options.

If you are a Project Manager, Supervisor, or the owner of the document you will be able to rename the file, delete the file and move the file.

If you are not any of the above roles within the project, these options will be greyed out.



## 4. Project Features - Documents

### Updating a Revision

The bottom right-hand side of this panel will display the version of document you are viewing. To upload a new version (if the document/drawing has been revised) drag and drop the new document into the designated area on the right.

A comment field will appear for you to add notes regarding the new revision and an option to notify users about this version. Click Upload when finished.



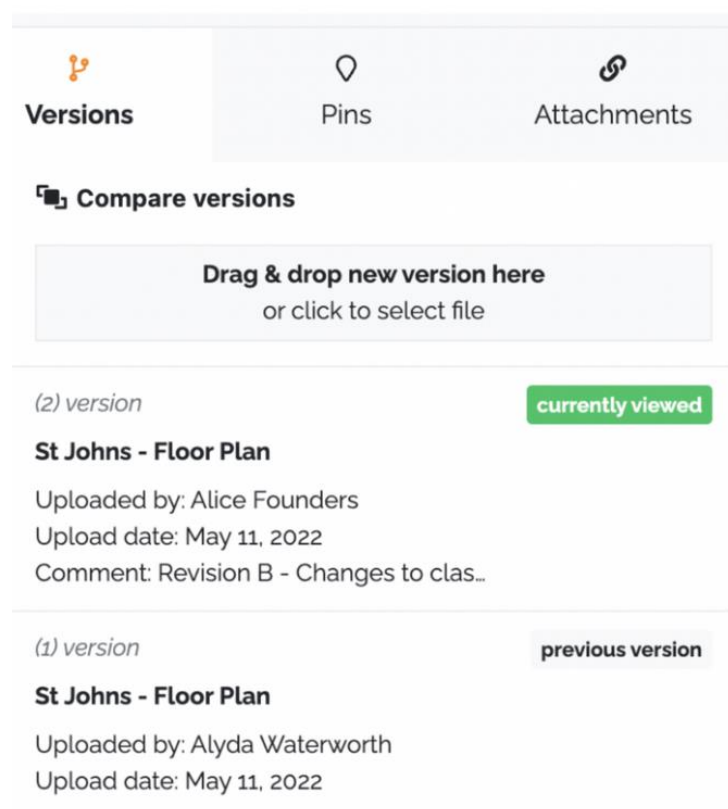
When the new revision is uploaded, you will see the right-hand panel adjusts to suit the new file.

You will now see 2 versions in the list.

By default, a user will always be viewing the latest revision when opening this document.

You will see information regarding the new revision such as Uploaded by, Uploaded date & Comments.

To view the previous revision, simply select it and the document will open.



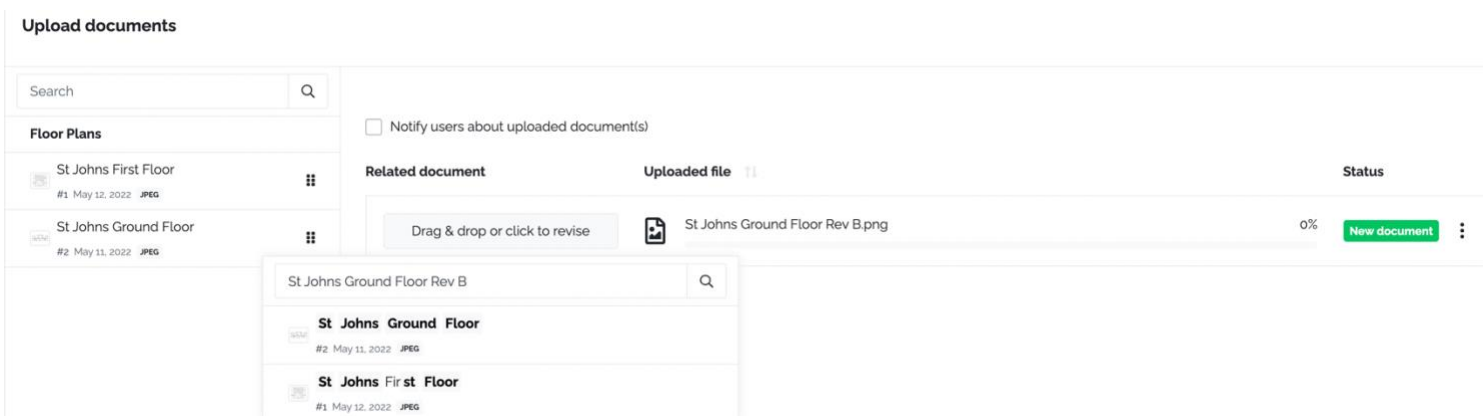
## 4. Project Features - Documents

### Bulk Revisioning

You may have the daunting task of revising multiple documents. Fonn makes that process quick and efficient with the Bulk Revisioning feature.

To use this feature, follow the below steps:

1. Open the folder you wish to revise documents within
2. Click [+ Upload document\(s\)](#)
3. Now click [Bulk revisioning](#)
4. Drag & drop the new revisions into the designated area
5. The Uploaded file column will show the revisions you have uploaded
6. You now have 2 options:
  - a) Click into the Related document column; Fonn will suggest original files based on the new revision file name
  - b) Drag & drop the original file from the left-hand folder into the Related document column.
7. Once the files are allocated, the Status will change to revision
8. The 3 dots will give you additional options, including the option to add a comment against the revision. This comment will be visible by users in the Versions panel when viewing the document
9. Click [Revise document](#) to complete the process



## 4. Project Features - Documents

### Comparing Revisions

If you have more than 1 revision uploaded, you will see the Compare Versions button.

This feature will highlight the differences between 2 revisions on screen so you can quickly see what's changed.

1. Click **Compare versions**
2. Select 2 versions from the list on the right-hand side  
You will see them highlighted in 2 different colours, red & blue
3. Click **Compare versions**
4. The screen will re load the document and highlight the changes on screen in the designated colours.

**133520-RSK-S-ALL-DR-D...** ☆

Uploaded by: Alyda Waterworth  
Upload date: Sep 9, 2021

[Save](#) [Download](#) ⋮

**Versions** Pins Attachments

[Compare versions](#) ✕ Close

Drag & drop new version here  
or click to select file

---

(2) version currently viewed

**133520-RSK-S-ALL-DR-DE-FD-001 (Re...**  
Uploaded by: Alyda Waterworth  
Upload date: Sep 9, 2021  
Comment: Version 2

(1) version previous version

**133520-RSK-S-ALL-DR-DE-FD-001 (Re...**  
Uploaded by: Alyda Waterworth  
Upload date: Sep 9, 2021

The screenshot shows a CAD software interface with a technical drawing on the left and a data table on the right. The drawing is a cross-section of a trench with mesh reinforcement. The table is a 'Foundation Schedule' with columns for Foundation Width (mm) and Foundation Thickness (mm).

Foundation Schedule	
Foundation Width (mm)	Foundation Thickness (mm)
400-600	300
1000-1200	400

Below the table is a company logo for RSK LAND & DEVELOPMENT ENGINEERING LTD and project information for 'SHOOTERSWAY PHASE 2 BERKHAMPSTED'.

**133520-RSK-S-ALL-DR-D...** ☆

Uploaded by: Alyda Waterworth  
Upload date: Sep 9, 2021

[Save](#) [Download](#) ⋮

**Versions** Pins Attachments

[Compare versions](#) ✕ Close

Drag & drop new version here  
or click to select file

---

(2) version currently viewed

**133520-RSK-S-ALL-DR-DE-FD-001 (Re...**  
Uploaded by: Alyda Waterworth  
Upload date: Sep 9, 2021  
Comment: Version 2

(1) version previous version

**133520-RSK-S-ALL-DR-DE-FD-001 (Re...**  
Uploaded by: Alyda Waterworth  
Upload date: Sep 9, 2021

[Chat](#)

## 4. Project Features - Documents

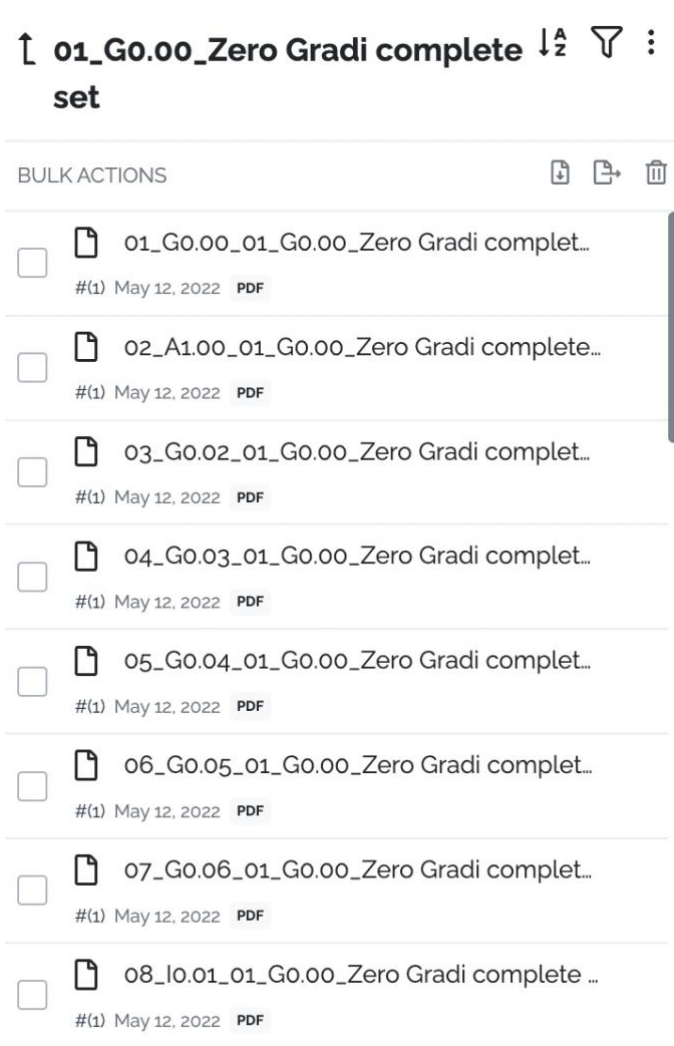
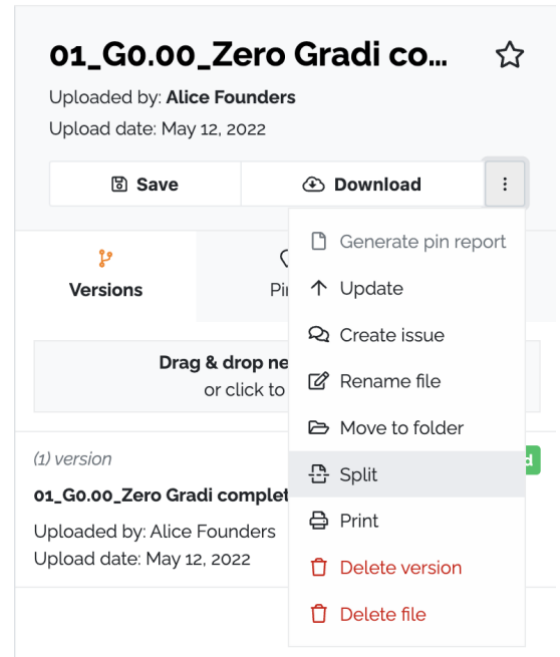
### Document Split

If you have a large multi-page document, you can use the document split feature to split the file page by page.

A folder will automatically be created and named after the document. Fonn uses an OCR reader to read the files and rename them correctly.

Annotations and revisions can now be made per file.

Site will now have quicker access to the drawing they need as they will no longer need to scroll through multiple pages.



## 4. Project Features - Documents

### Document Tools Explained

#### Navigation Tools:



Use these tools to navigate around the document

#### Editing Tools:



Use these tools to undo, redo and delete annotations

#### Pins:



**Task Pin** – Drop this pin on the document to add a task and link it to this spot



**Issue Pin** – Drop this pin on the document to add an issue and link it to this spot



**Scope of Works Pin** – Drop this pin on the document to link this spot to a Scope of Works item

#### Measure Tools:



**Distance** – Use this tool to draw on the document and measure distance



**Perimeter** – Use this tool to draw on the document and measure perimeter



**Free Shape Area** – Use this tool to draw free hand shapes on the document and measure area



**Circle Area** – Use this tool to draw a circle on the document and measure area



**Square Area** – Use this tool to draw a square on the document and measure area



**Perforated Edge Area** – Use this tool to draw a shape with a perforated edge and measure area

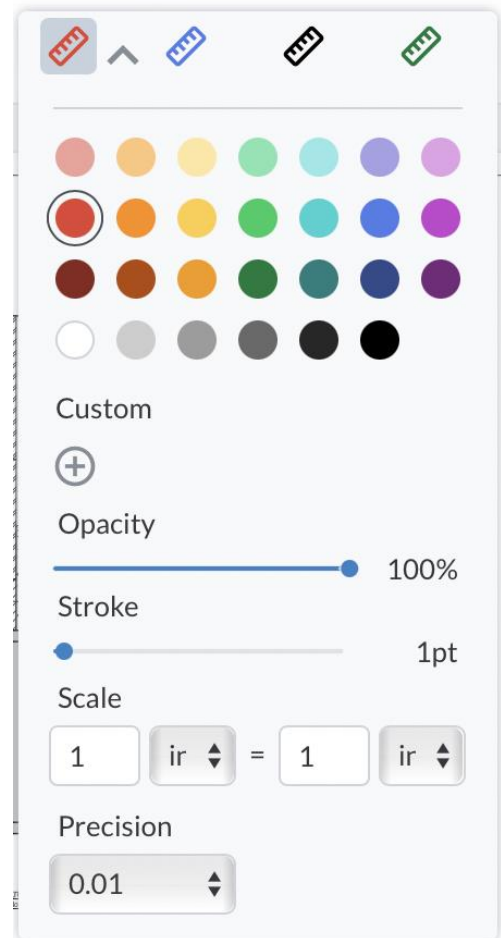


**Count Measurement** –

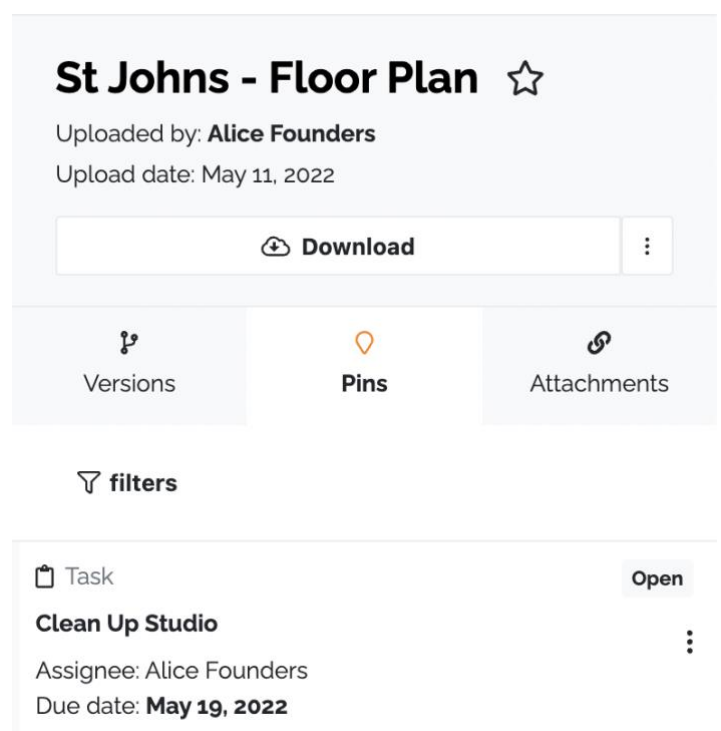


## 4. Project Features - Documents

Once a measure tool has been selected, you will have a choice of colours and the option to set the scale through the small arrow icon.



If pins are added onto the document, you will see more details in the pins tab.



## 4. Project Features - Documents

### Document FAQ

#### Q) How do I move files to a different folder?

A) To move files, select the files using the tick boxes then click the (2) button, now select the folder you wish to move them to and click select.

#### Q) How do I delete a file?

A) To delete a file, select the files using the tick boxes then click the (2) button. A pop up will appear for you to confirm the action.

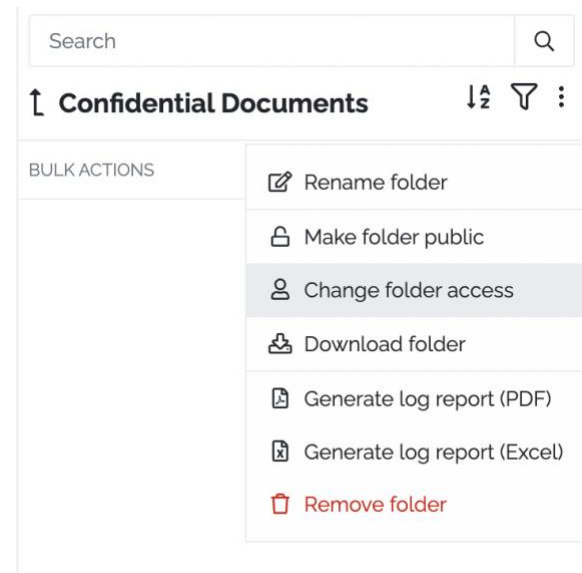
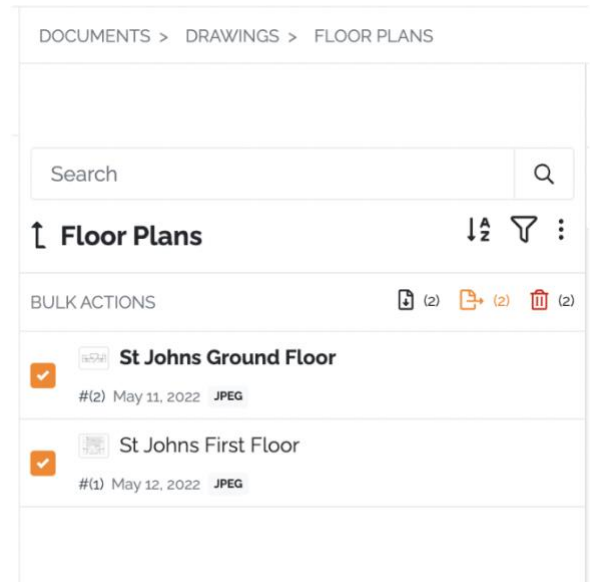
#### Q) How do I give a user access to a private folder?

A) To give a user access to a private folder, you must first have the correct permission to do so.

1. Enter the folder, then click the 3 vertical dots.
2. Select 'Change folder access'. A pop up will appear showing you the list of possible project members.
3. Users who are greyed out will already have access into this folder.
4. Select the users you wish to give access to, then click 'Select members'.
5. Your chosen users now have access to this folder.

#### Q) What document formats are accepted?

A) Click [here](#) to see a full list of accepted formats.



## 5. Project Features - Issues

Issues is where observations and snags will be logged on the project.

To create an issue, follow these steps:

1. Click the + Add issue button
2. A pop up will appear for you to enter some further details
3. Enter a title of the issue
4. Add a description of what has happened
5. Assign relevant categories from the prepopulated list (This list will be customised by an Admin user)

6. By default, the issue will be private.

This means that only the creator, Project Managers & Supervisors have direct access to it.

You can use the + icon to invite more members from the project.

7. Next add an attachment.

This can be either an image or a document from the project folders.

If you select image, you will be given the option to mark-up/annotate that image to highlight the issue

8. Now click Create issue

### New issue

**TITLE**  
Broken Window on Ground Floor

**DESCRIPTION**  
Cracked glass on left side window in Classroom 1 - Ground Floor.  
Needs replacement.

**CATEGORIES**  
Snagging x

**MEMBERS** +  
You and the Owner will be added by default  
Alice Founders

**RELATED ATTACHMENT**  
 None  Upload image  Existing document

**VISIBILITY**

Private  
Only issue members

Public  
Any project member

### IMAGE



Not larger than 50MB

Choose file Draw on image image.jpg

Create issue

Cancel

## 5. Project Features - Issues

The issue is now created, and a notification will be sent to all included members.

The issue will open on the right-hand side with a discussion board.

Here you will see the description and the annotated image. The discussion board allows you to discuss the issue with project members to come to a resolution.

#125917 Creation date: May 12, 2022 23:07

Active

### Broken Window on Ground Floor

Snagging

DISCUSSION VARIATIONS TASKS MEMBERS

**AF** Alice Founders May 12, 2022 11:07:37 PM  
Cracked glass on left side window in Classroom 1 - Ground Floor.  
Needs replacement.

**AF** Alice Founders May 12, 2022 11:07:37 PM

**AF** Alice Founders May 13, 2022 10:21:32 PM  
Created a new variation

Replacement glass to window in Classroom 1 pending  
£300.00

**SD** Samuel Davies May 13, 2022 10:25:27 PM  
Accepted a variation

+ Type your message...

You will also notice several tabs across the top. The orange line will indicate the tab that you are currently viewing









This tab will show a history of the full discussion, including comments/images from other members.

## 5. Project Features - Issues

Use the message bar to type your messages, then hit the send button.

The **+** icon allows you to add more information into the issue discussion, such as:



-  **Image** – Use this option to insert more images relating to this issue
-  **Document Link** – Use this option to insert a link to a document within the project folders
-  **Scope of Works Item** – Use this option to link this issue to a Scope of Works item
-  **Notify** – Use this option to send a notification reminding invited members about this issue
-  **Members** – Use this option to invite more members into this issue
-  **Task** – Use this option to add a task relating to this issue. The 2 will automatically be linked

The Variations tab will summarise any variations that have been added directly against this issue.

DISCUSSION   VARIATIONS   TASKS   MEMBERS

A variation (sometimes referred to as a change request) is an alteration to the scope of work originally specified in the contract.

To add a variation against this issue, follow these steps:

1. Select the Variations tab
2. Click 
3. In the popup, enter further details  
(Only fields marked with a \* are required)
  - a. Title\* – Explain the variation
  - b. Type – Select a relevant type
  - c. Package – Select a relevant package
  - d. Budget\* - Enter the value for this variation
  - e. Timeline – Enter an impact on the timeline
4. Now click 

## 5. Project Features - Issues

Once the variation is created, a push notification will be sent to the Project Manager, Supervisor and the Client (if you have them added to the project with the correct role)



If the Client is not already invited into the issue, they will automatically be added once the variation is submitted.

The following icons next to the Issue names will let you know if there are any variations against it and their status:



**Pending** – This icon means there is a variation on this issue that is still pending approval



**Accepted** – This icon means there is a variation on this issue that is has been accepted



**Rejected** – This icon means there is a variation on this issue that is has been rejected

## 5. Project Features - Issues

### Approving/Rejecting a Variation in an Issue

To accept or reject a variation you must have the role of Project Manager or Client.

1. Click the Variations tab
2. If you have the correct role, you will see the variation sitting here with the Accept or Reject button


#129187 Pending

Replacement Worktop in Kitchen Area

Created on May 30, 2022  
by Alice Founders

Impact on budget (Vat incl.)  
**£450.00**

Impact on time  
**3 days**

 Accept Reject

3. Simply click the button for the decision you wish to make
4. The discussion board within the issue will update with the tile to let other users within it, know that a decision has been made

**AF** **Alice Founders** May 30, 2022 10:04:20 PM  
*Accepted a variation*

 **Replacement Worktop in Kitchen Area**  
£450.00

## 5. Project Features - Issues

The Tasks tab will summarise any tasks that have been added directly against this issue.



To add a task here, follow the below steps:

1. Click the + Add task to issue button
2. Fill out the details relating to the task:
  - a. Enter a Title
  - b. Enter a description
  - c. Select a responsible member
  - d. Add a Due Date
  - e. Select a save option:
    - i. Save & Open – Save the task & open it on screen
    - ii. Save & Close – Save the task & return to the issue

### New Task

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p><b>TITLE</b> <span style="float: right;">*</span></p> <p>Order materials</p> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p><b>DESCRIPTION</b></p> <p>Please contact Worktops Direct &amp; place an order for the below:</p> <p>Oak Worktop (1600m x 2000m)</p> <p>Quoted at £450.00 (Reference no. 123917)</p> <div style="text-align: right; margin-top: 5px;"> </div> </div>	<p><b>RESPONSIBLE</b> <span style="float: right;">✎ Edit</span></p> <p><span style="background-color: #2c5e8c; color: white; padding: 2px 5px; border-radius: 3px;">SD</span> Samuel Davies</p> <p><b>DUE DATE</b> <span style="float: right;">✎ Edit <span style="margin-left: 10px;">🗑</span></span></p> <p>📅 Jun 6, 2022</p> <p><b>RECURRING PERIOD</b> <span style="float: right;">✎ Edit</span></p> <p>None</p>
--	--

Save & open

Save & close

Cancel



## 5. Project Features - Issues

Your task is now added and the responsible person will be notified via push notification and email.

A tile will be updated within the Issue discussion board so that you can keep a track of actions for audit trail purposes.

 Alice Founders May 30, 2022 10:24:41 PM  
Created a new task

**Order materials**  
Assigned to: Samuel Davies  
Comment: Please contact Worktops Direct & place an order for the below: Oak Worktop (1600m x 2000m) Quoted at £450.00 (Reference no. 123917)

The members tab will show you a list of all members who are invited into this issue.

DISCUSSION VARIATIONS TASKS MEMBERS

You will also be able to see whether the issue is set to Public or Private.



This issue is Private. Only notified members have access to it.

Make public

By default, the issue will be private.

This means that only the creator, Project Managers & Supervisors have direct access to it.

If you decide to make the issue public, then all users regardless of their role will be able to view it.

## 5. Project Features - Issues

You can use the  button to add more members into this issue.

Members who are already invited will be displayed in the list below.

You can use the Remind everyone button to send a notification to all users reminding them about this Issue or use the notification icons next to the users name to remind them individually.

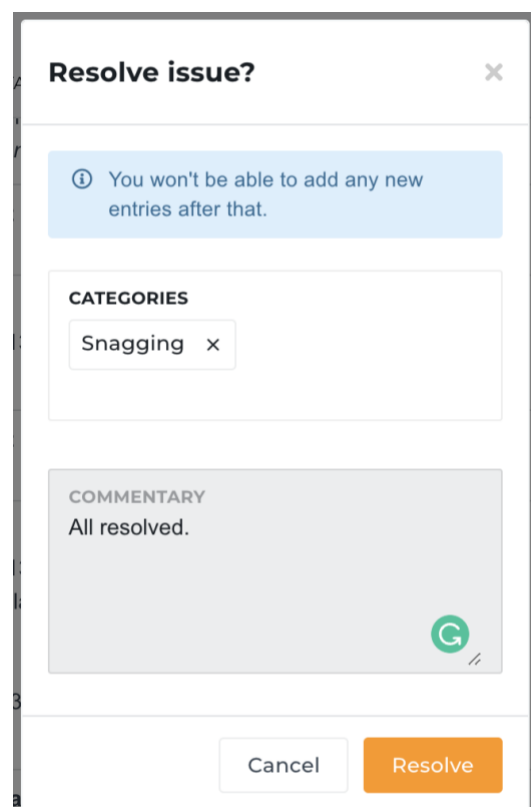
There is also a delete icon if you wish to remove this member from the issue.



Once the Issue is resolved, you can close it down within Fonn. The Issue will become a read only view and no further comments can be added. This is perfect for your audit trail.

Use the  button to do this.

You can amend the category at this point and add an optional closing comment.



## 6. Project Features - Tasks

The Tasks screen will show you all tasks within the project split into 2 categories:

- **Open** – Tasks that are still on going and have not been marked as complete
- **Closed** – Tasks that have been marked as complete

You will see figures for number of overdue & open tasks and you can use the filters on the right-hand side to sort them by:

- **Assignee**
  - **Anyone** – See tasks assigned to all users on the project
  - **Me** – See only tasks assigned to you
  - **Other than me** – See tasks that are assigned to all users but you
- **Assigned by**
  - **Anyone** – See tasks assigned to a user by anyone on this project
  - **Me** – See tasks that you have assigned to other users

OVERDUE  
0

OPEN  
2

ASSIGNEE

Anyone

Me

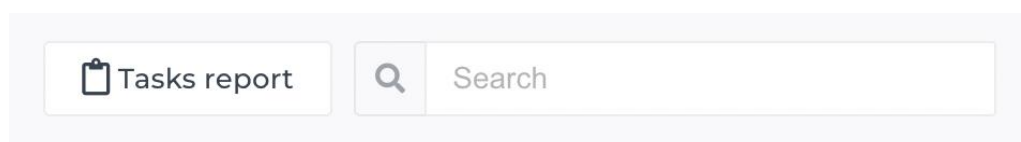
Other than me

ASSIGNED BY

Anyone

Me

You will see a search bar to aid you in finding a specific task.




The Tasks report button will generate a pdf summary of the tasks and their statuses. If you wish to learn more about reports, go to the Reports Hub section of this manual.

## 6. Project Features - Tasks








### Creating a Task




To add a task, follow the below steps:

1. Click the  button
2. Fill out the details relating to the task:
  - a. Enter a Title
  - b. Enter a Description
  - c. Select a Responsible member
  - d. Add a Due Date
  - e. Select a save option:
    - i. Save & Open – Save the task & open it on screen
    - ii. Save & Close – Save the task & return to the tasks screen

Once the task has been added, the responsible user will receive an email notification and a push notification if they are logged in on the app.

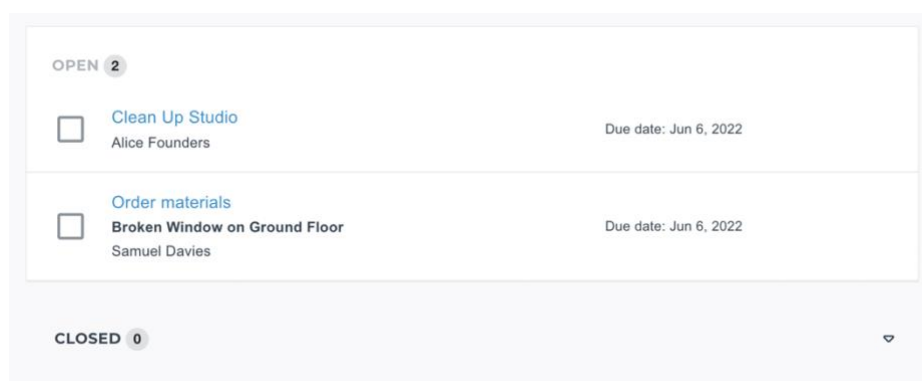
### New Task

<b>TITLE</b> *	<b>RESPONSIBLE</b> 
Order materials	 Samuel Davies
<b>DESCRIPTION</b>	<b>DUE DATE</b>  
Please contact Worktops Direct & place an order for the below: Oak Worktop (1600m x 2000m) Quoted at £450.00 (Reference no. 123917)	 Jun 6, 2022
	<b>RECURRING PERIOD</b> 
	None

## 6. Project Features - Tasks

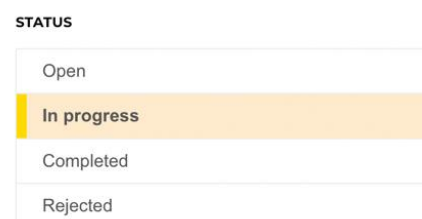
To view more details about a task, click the blue hyperlink.



When the task is opened, you will see some additional fields. You will see the original description, set by the user who created the task and the project this task is linked to.

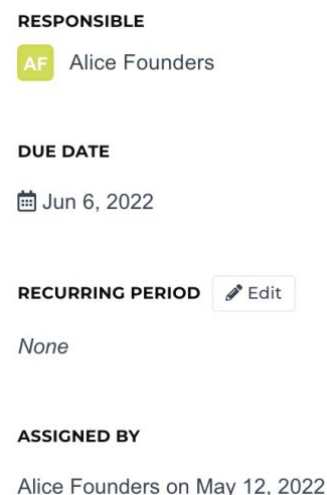
On the right-hand side you can change the status of the task to the following:

- **Open** – Task is not started
- **In Progress** – Task is in progress
- **Completed** – Task is complete
- **Rejected** – Task is not needed/rejected



Below that are details outlining:


- **Responsible** – User set as responsible for completing this task
- **Due Date** – The date this task is to be completed by
- **Recurring Period** – Is this task set to recur daily, weekly, monthly, yearly
- **Assigned by** – Who created this task and assigned it to the responsible user



## 6. Project Features - Tasks

There is also an area for users to add comments to allow the assignee to keep track of updates.

To add a comment:

1. Click the  button
2. Type your comment
3. Click save

You can also attach images and link documents using the  button.

×


**TITLE**


### Clean Up Studio

---

**DESCRIPTION**  
Pack away materials and tools. Vacuum the area ready for paint tomorrow.


**PROJECT**  
[St Johns Academy](#)


**COMMENT** 


 **alice\_founders@outlook.com** a few seconds ago

Materials have been packed away.

The cleaner will be attending the site tonight to vacuum.

**IMAGES** 



**DOCUMENTS**  Upload multiple documents

None

**STATUS**


Open

In progress


Completed


Rejected

**RESPONSIBLE**

 Alice Founders

**DUE DATE**

 Jun 6, 2022

**RECURRING PERIOD**  Edit

None

**ASSIGNED BY**

Alice Founders on May 12, 2022

## 6. Project Features - Tasks

To mark a project as complete, follow the below steps:

1. Click the Completed status
2. A pop-up will appear for you to add an optional final comment
3. Click Yes.

**Complete this task?**

COMMENT

Area is now tidy, vacuumed & ready for paint tomorrow.

No
Yes

The comment will be added, and the task is now marked as completed.

✕

**TITLE**

### Clean Up Studio

---

**DESCRIPTION**

Pack away materials and tools. Vacuum the area ready for paint tomorrow.

**PROJECT**

[St Johns Academy](#)

**COMMENT** +

AF

**alice\_founders@outlook.com** a few seconds ago

Area is now tidy, vacuumed & ready for paint tomorrow.

---


AF

**alice\_founders@outlook.com** 17 minutes ago

Materials have been packed away.

The cleaner will be attending the site tonight to vacuum.

**IMAGES** +



**DOCUMENTS** + [Upload multiple documents](#)

None

**STATUS**

Open

In progress

Completed

Rejected

**RESPONSIBLE**

AF Alice Founders

**DUE DATE**

Jun 6, 2022

**RECURRING PERIOD** Edit

None

**ASSIGNED BY**

Alice Founders on May 12, 2022

## 7. Project Features – Scope of Works

The Scope of Works, also called a Programme, Work Breakdown Structure (WBS), Checklist or similar is the heart of every project.

Here you will find everything that is planned in the project.

Complete, document and verify the activities during the project to document quality and progress. This is your tailor-made implementation plan.

### Uploading your Scope of Works/Programme

To upload your Scope of Works/Programme to Fonn, you have 2 options:

1. Transfer the information into one of our templates then upload it to the project
2. Build the Scope of Works on screen using Edit Mode within the project

### Option 1 – Template

1. Go to Organisation menu
2. From the left-hand menu, select Scope of Works then select Templates
3. At the top right of the screen, click Download Example Template

### Scope Of Works templates

[+ Add template](#)
[Download example template](#)

4. An excel file will then download. Once opened, you will see the below:

	A	B	C	D	E	F	G
1	Index	Name (en-US)	Name (en-GB)	Name (es-MX)	Name (nb-NO)	Name (pl-PL)	Description (en-US)
2	1	Groundwork			Grunnarbeid		Sample description 1
3	1.1	Building site–groundwork			Byggepass - grunnarbeid		Sample description 1.1
4	1.1.1	Completly new translation			Høydeavvik av pukkeputen (+/- 15mm)		Sample description 1.1.1
5	1.2	Sole foundation			Ringmur		Sample description 1.2
6	1.2.1	Length and width dimensions (total dimensions) according to working drawings (+/-10 mm)			Lengde- og breddemål (totalmål) iht arbeidstegning (+/-10mm)		Sample description 1.2.1
7	1.2.2	Diagonal dimensions according to working drawings (+/-10 mm)			Diagonalmål iht arbeidstegning (+/-10mm)		Sample description 1.2.2
8							
9							



## 7. Project Features – Scope of Works

**Index** - This will decide whether the item is a list Item (heading) or a checkpoint (an item to marked off)

Example the above, translates to the below within Fonn

Move your information into the relevant columns using the examples within the excel file for guidance.

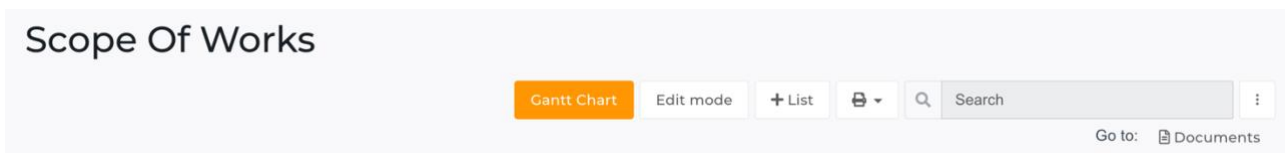
5. To upload your completed template, go to your project
6. From the left-hand menu, select Settings then click the Scope of Works tab
7. Scroll down to the templates section, choose your file then select the appropriate action:


## 7. Project Features – Scope of Works

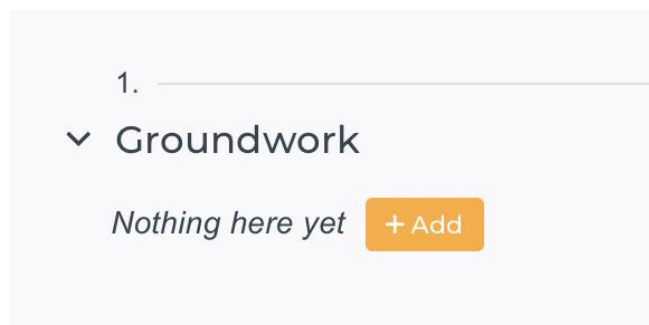
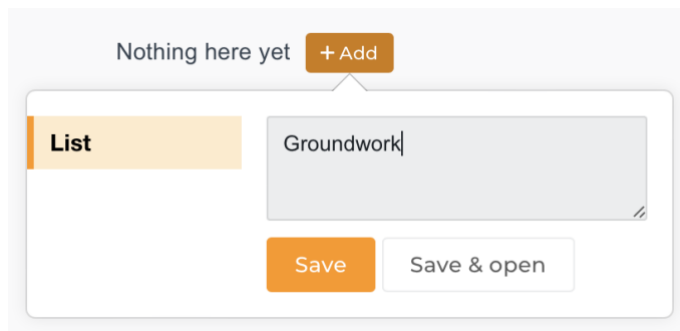
8. If your template is formatted correctly, you will see a green pop-up notification on the top right of your screen to let you know the upload was successful.

### Option 2 – Edit Mode

1. Open your project
2. From the left-hand menu, select Scope of Works
3. Click Edit Mode



4. Using the  button, start to build your Scope of Works/Programme as per below wo



## 7. Project Features – Scope of Works



1. \_\_\_\_\_

▼ Groundwork

Nothing here yet + Add

**Checkpoint**

**List**

Building Site - Groundwork

Save Save & open



1. \_\_\_\_\_

▼ Groundwork

1.1. \_\_\_\_\_

▼ Building Site - Groundwork

Nothing here yet + Add

**Checkpoint**

List

Height difference in aggregate based material

Save Save & open



1. \_\_\_\_\_

▼ Groundwork

1.1. \_\_\_\_\_

▼ Building Site - Groundwork

Height difference in aggregate based material

+ Item



This is an example workflow. If you need further assistance building your Scope of Works on Fonn, please contact your dedicated Customer Success Manager.

## 7. Project Features – Scope of Works

### Using the Scope of Works

Scope of Works items allow users to be assigned and track the progress of their work. Project Managers and Supervisors will have high-level visibility and be able to track the progress (%) of the project.

Below you will see an example Scope of Works template.

You will notice that some of the items have green tabs on the left-hand side. This colour indicates the status of the item.

The screenshot displays a project management interface with a 'STATUS' section at the top. It shows a summary of items: 491 All (orange), 312 Open (grey), 0 In progress (yellow), 179 Complete (green), and 0 Verified (blue). A 'QUICK FILTERS' button is also visible.

The main content area shows a hierarchical list of items:

- 1. Groundwork (7 items, 0 In progress, 46 Complete, 87% progress)
  - 1.1. Building site- groundwork (7 items, 0 In progress, 3 Complete, 30% progress)
    - 1.1.1 Height difference in aggregate base material (+/-15 mm) (100% Complete)
    - 1.1.2 Documentation of staking out/positioning of house according to site plan and coordinates (received) (100% Complete)
    - 1.1.3 Road safe for driving with lorry to building trench, width and minimum turning radius (max. 2 m) (100% Complete)
    - 1.1.4 Space for materials, containers, workman huts (0% Open)
    - 1.1.5 Provisional plumbing risers for waste water for workman huts (fitted) (0% Open)

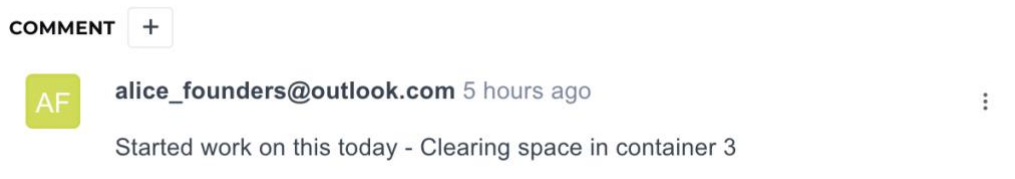
### Scope of Work Statuses Explained

- **Open** – The scope of works item is not yet started
- **In Progress** – The scope of works item is in progress
- **Complete** – The scope of works item is complete
- **Verified** – The scope of works item is complete and has been verified by a Project Manager/Supervisor

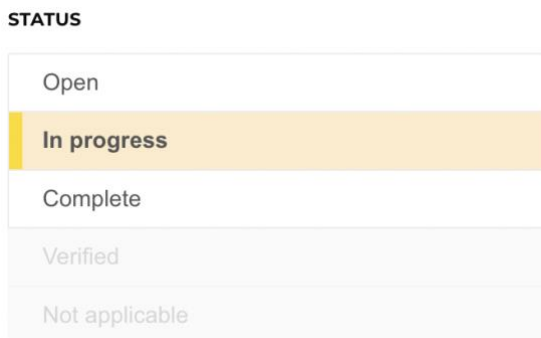
## 7. Project Features – Scope of Works

When you open a Scope of Works item, you will see some fields to add more information to.


A section to add comments for Project Managers/Supervisors or other users.



An area to select the status of the Scope of Works item.



Only users with the Project Manager or Supervisor role can set the status to Verified

Areas to link the following information using the  button:

- Images
- Documents
- Issues
- Tasks

IMAGES 



DOCUMENTS  Upload multiple documents

None

ISSUES 

None

TASKS 

None

## 7. Project Features – Scope of Works

The right-hand column will give some additional information about the item.

- **Responsible** – User who is responsible for completing this item
- **Planned Start Date** – The date this item is planned to start on
- **Due Date** – The date this item should be completed by
- **Time Planned** – How much time should be spent on this item
- **Time Spent** – How much time has been spent on this item
- **Progress %** - The progress percentage for this item

### RESPONSIBLE

Alice Founders

### PLANNED START DATE

May 31, 2022

### DUE DATE

Jun 1, 2022

### TIME PLANNED

None

### TIME SPENT

0:00h

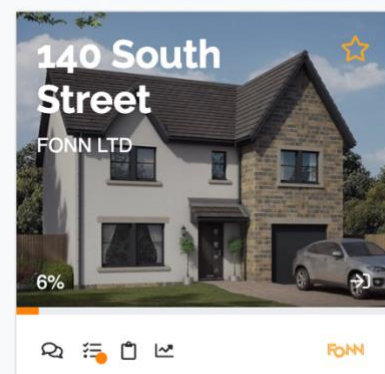
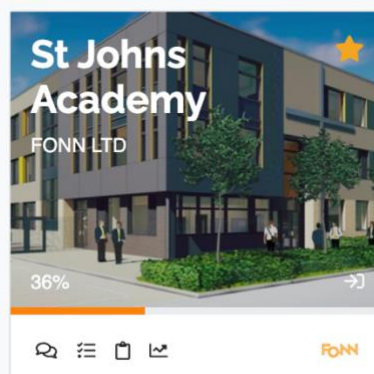
### PROGRESS Edit

50 %

Started on May 31, 2022  
by Alice Founders

As you work through completing the Scope of Works items, the project icons on the dashboard will display a percentage marker so you can quickly gauge how the projects are performing.

## Projects




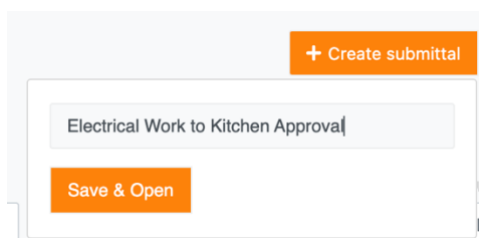
## 8. Project Features – Submittals

The Submittals feature allows you to request documents to be submitted to you or send documents to somebody for approval.

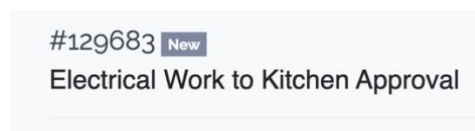
### Creating a Submittal

To create a submittal, follow the below steps:

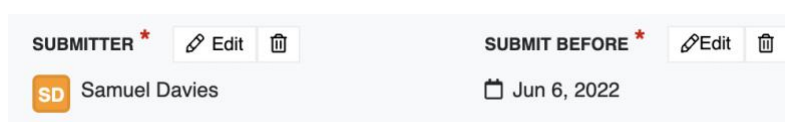
1. Click the  button
2. Now give the Submittal a title, for example:



3. A screen will open showing you some additional information
  - a. A Unique ID no. has been generated
  - b. Status of Submittal
  - c. Title of Submittal



4. Next, you need to configure who should be involved.
  - a. If you are submitting the documents yourself tick  I'M THE SUBMITTER otherwise, leave this option blank
  - b. If you ticked  I'M THE SUBMITTER Fonn will automatically remove the Submitter & Submit Before fields.
  - c. If you left that option blank, you need to now select who is submitting the documents and a date they should be submitted before



## 8. Project Features – Submittals

- d. If the document being submitted does not require approval, tick the  **INFORMATIVE ONLY** button. This will automatically remove the Approver & Approve before fields.
- e. If you left that option blank, you now need to select who should approve this document and a date they should be approved before

- f. You may want to add users to keep track of this Submittal. Use the  **+** icon to select them from your members list, or add their emails to the external reviewers section if they are not a member of Fonn.

5. Next, we need to configure the documents.

- a. If you clicked  **I'M THE SUBMITTER** you now need to attach the document you are submitting

- b. Select the folder you would like the document to be added into once it is approved. Fonn will automatically create a Submittals folder on your project, if a custom folder is not selected.



c. There is some space to enter additional information if you wish

**DOCUMENT FILE REQUIREMENTS**

**PACKAGE**

**SECTION REFERENCE**

**TYPE**

Select... ▾

d. Once the required fields have been met:  
Click  to send the submittal

The Submittals home screen will show you 2 different views depending on your permission role:

- **Project Manager/Supervisor** – you will see a list of all ongoing Submittals on the project
- **Contributor** – you will see a list of all ongoing Submittals that you have created or been added to as a reviewer or approver

### Submittals

[+ Create submittal](#) [Import](#) [Get submittals report](#) ⋮

ID	STATUS	TYPE	TITLE	PACKAGE	SECTION	SUBMITTER	SUBMIT BY	APPROVER	APPROVE BY
#129683	Empty		<b>Electrical Work to Kitchen Approval</b>			alyda.admin@fonn.co.uk	Jun 6, 2022	alice_founders@outlook.com	Jun 13, 2022

## 8. Project Features – Submittals

### Submittal Statuses Explained


- **New** – This is a new submittal that has been created but not yet submitted
- **Empty** – This is an empty submittal as the user selected as the submitter has not yet attached the required documents
- **Waiting for Approval** – This submittal has been updated by the submitter and is now pending approval from the approver
- **Approval Not Required** – This submittal does not require approval; it is for information purposes only
- **Approved No Exceptions** – This submittal has been approved with no comments
- **Approved - Exceptions as Noted** – This submittal has been approved with noted comments
- **Not Approved – Revise & Resubmit** – This submittal has been rejected and the submitter must revise based on the comments provided and resubmit
- **Not Approved – Rejected** – This submittal has been rejected completely
- **Not Reviewed** – This submittal has not yet been reviewed

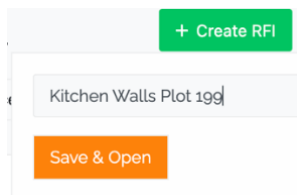
## 9. Project Features – RFI

Projects often need clarification along the way. Resolving these clarifications is important before starting work on the project. With Fonn, you can automate the RFI process.

### Creating an RFI

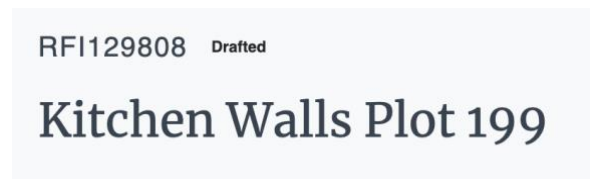
To create an RFI, follow the below steps:

1. Click the  button
2. Now give the RFI a title for example:



A screenshot of the RFI creation form. At the top right is a green button labeled '+ Create RFI'. Below it is a text input field containing the text 'Kitchen Walls Plot 199'. At the bottom is an orange button labeled 'Save & Open'.

3. A screen will open showing you additional information:
  - a. A Unique ID no. has been generated
  - b. Status of the RFI
  - c. Title of the RFI



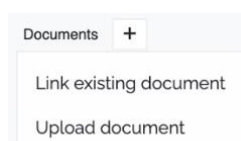
A screenshot of the RFI summary screen. It shows the ID 'RFI129808' with the status 'Drafted' next to it. Below this, the title 'Kitchen Walls Plot 199' is displayed in a large, bold font.

4. Next you need to configure the reason for raising this RFI
  - a. In the Question field, insert your question in as much detail as possible




A screenshot of the RFI configuration screen. On the left, under the heading 'Request', is a text area labeled 'What information do you need'. On the right, under the heading 'QUESTION \*', is a larger text area containing the question 'What colour should the kitchen walls be painted in Plot 199?'. A small green icon is visible in the bottom right corner of the question field.

- b. You have the option to include any supporting documents






A screenshot of the document upload options. It shows a 'Documents' section with a plus sign icon. Below it are two options: 'Link existing document' and 'Upload document'.

## 9. Project Features – RFI

- c. You may want to add users to keep track of this RFI.  
Use the  icon to select them from your members list, or add their emails to the external followers section if they are not a member of Fonn.

**Discussion**  
Help the respondent to find an answer

**FOLLOWERS** +  
Project Managers and Supervisors are included by default

Alice Founders  Samuel Davies  Alyda Waterworth 

**EXTERNAL FOLLOWERS**  
Non-Fonn members with access to the RFI

Type email to invite follower



By default, Project Managers & Supervisors will be added as followers automatically

- d. You can suggest an answer if you think you know it already

**SUGGESTED ANSWER** +

From memory, the client ordered #FFFDD0 - please confirm



5. Finally, set a due date and a Respondent to answer this RFI.
- The due date will set automatically based on the project RFI settings (example: 7 days)
  - The respondent can be a Fonn user or an external user.

**DUE DATE** \*    
Jun 6, 2022

**RESPONDENT** \*    
 Samuel Davies

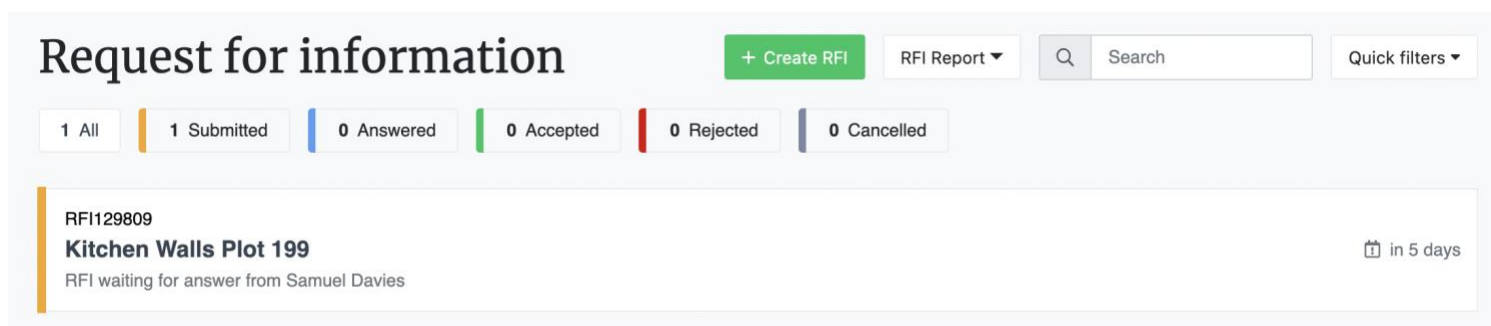
**Send RFI**  or **Remove**

## 9. Project Features – RFI

6. Now click 

The RFI home screen will show you 2 different views depending on your permission role:

- **Project Manager/Supervisor** – you will see a list of all ongoing RFI on the project
- **Contributor** – you will see a list of all ongoing RFI that you have created or been added to as a follower or respondent



The screenshot shows the 'Request for information' dashboard. At the top, there is a title 'Request for information', a '+ Create RFI' button, an 'RFI Report' dropdown, a search bar, and 'Quick filters'. Below the title, there are six status filters: '1 All', '1 Submitted', '0 Answered', '0 Accepted', '0 Rejected', and '0 Cancelled'. The main content area displays a single RFI entry: 'RFI129809 Kitchen Walls Plot 199' with a sub-note 'RFI waiting for answer from Samuel Davies' and a 'in 5 days' timer.

### RFI Statuses Explained

- **Submitted** – This is a new RFI that has been submitted to the respondent
- **Answered** – This RFI has been answered by the and is now pending approval
- **Accepted** – This RFI has been answered by the respondent. This answer has been accepted/approved
- **Rejected** – This RFI has been answered by the respondent. This answer has been rejected
- **Cancelled** – This RFI has been voided/cancelled

## 10. Project Features – Variations

A variation (sometimes referred to as a change request) is an alteration to the scope of work originally specified in the contract.

The Variations screen will be shown to the following permission roles only:

- **Project Manager**
- **Supervisor**
- **Client**

We only show the Variation screen to these roles due to the confidential information surrounding the projects budget.

### Budget Summary

The Budget summary will outline the initial project cost plus any accepted variations on the project with a final project cost.



You will also see figures relating to pending variations (that have not yet been accepted) so you can keep track of potential additional costs.

#### Budget summary



NO. OF PENDING VARIATIONS	PENDING VARIATIONS VALUE	INITIAL PROJECT COST	FINAL PROJECT COST
<b>1</b>	<b>£250.00</b>	<b>£4,000,000.00</b>	<b>£4,000,300.00</b>
NO. OF ACCEPTED VARIATIONS	PENDING SCHEDULE CHANGES	ACCEPTED VARIATIONS VALUE	ACCEPTED SCHEDULE CHANGES
<b>1</b>	<b>3 Days</b>	<b>£300.00</b>	<b>0 Days</b>

## 10. Project Features – Variations

The tabs below will summarise Pending, Accepted & Rejected variations for you.


If you have the correct role, as mentioned above, you will also have the ability to accept or reject the variation using the   icons on the right hand side.

If the variation is linked to an issue, you will see a hyperlink in orange text underneath. You can click this to jump to the issue.

PENDING							ACCEPTED	REJECTED
Title	Package	Type	Budget impact	Schedule impact	Created by	Actions		
Replacement window ledge in white <a href="#">Link to issue</a>	Uncategorized	Client request	£250.00	3 Days	Alice Founders	 	All packages ▾ All types ▾	

### Creating a variation

To create a variation, follow the below steps:

1. Click the  button
2. A pop-up will appear:
  - a. Enter a title/description
  - b. Select the type of request
    - i. Sub Request
    - ii. Main Contractor Request
    - iii. Client Request
    - iv. Not Defined
    - v. Spec Adjustment
  - c. Select a Package
  - d. Enter an impact to the budget
  - e. Enter a no. of days that the schedule will be impacted by

**Add variation**

TITLE \*

Upgrade the bathroom taps to matte black

TYPE

Client request ▾

PACKAGE

Bathroom ▾

GBP BUDGET IMPACT \*

600

SCHEDULE IMPACT

3

Close Create variation

# 11. Project Features – Forms

Using digital forms on Fonn will help streamline your processes and cut down on paper usage.



For help on how to build forms within Fonn, contact your dedicated Customer Success Manager

## How to fill out a form

1. First you will see a list of available forms
  - a. Click the Fill in form button against the form you wish to complete

Templates				Search... <input type="text"/>
Form title	Number of filled in forms	Origin	Status	
Checklist Covid-19		system	Published	<span style="background-color: #f4a460; padding: 2px 5px; border: 1px solid #ccc;">Fill in form</span>
Handover Protocol		system	Published	<span style="background-color: #f4a460; padding: 2px 5px; border: 1px solid #ccc;">Fill in form</span>
Incident report		system	Published	<span style="background-color: #f4a460; padding: 2px 5px; border: 1px solid #ccc;">Fill in form</span>
JSA		system	Published	<span style="background-color: #f4a460; padding: 2px 5px; border: 1px solid #ccc;">Fill in form</span>
Notes / Meeting Minutes		system	Published	<span style="background-color: #f4a460; padding: 2px 5px; border: 1px solid #ccc;">Fill in form</span>
Safety Inspection		system	Published	<span style="background-color: #f4a460; padding: 2px 5px; border: 1px solid #ccc;">Fill in form</span>

- b. A pop-up will appear giving you the option to edit the name of the form that will be created.

By default, the format will be: The title of the form followed by the date you are creating the form

To continue, click save

FORM NAME \*

Checklist Covid-19 - Jun 01, 2022 (

Save




## 11. Project Features – Forms

- c. The form will open on screen
- i. Continue to fill out the form depending on the fields that have been built

The screenshot shows a form interface with the following elements:

- DATE:** Jun 01, 2022
- Have you been diagnosed with Covid-19?**  Yes  No
- Do you currently have or have you had any symptoms of a respiratory tract infection in the last week?**  Yes  No
- Have you had a fever?**  Yes  No
- Have you had a cough?**  Yes  No
- Have you experienced shortness of breath?**  Yes  No

On the right sidebar, there are buttons for 'Save draft' and 'Submit document'. Below these are sections for 'Attach images', 'Tasks', and 'History'.

- d. If this form needs to be filled out over a number of days, you can use the  button to save a draft and continue it later.



Fonn will automatically save a draft every 10 seconds to prevent loss of data

Submit document

- e. Once you have completed the form, click the  button

## 11. Project Features – Forms

- Once submitted, the form will preview on screen as a PDF document. Fonn will store a PDF copy of this form in the Forms (PDF) folder within the Documents section.

You can jump directly to the PDF copy by clicking

[Go to document](#) 

Created at Jun 01, 2022 with **FO:NN**

**St Johns Academy**  
46 St Johns Ave., London  
NW1 2HS GB

### Checklist Covid-19

---

**Date** Jun 01, 2022

---

**Have you been diagnosed with Covid-19?**  Yes  No

**Do you currently have or have you had any symptoms of a respiratory tract infection in the last week?**  Yes  No

**Have you had a fever?**  Yes  No

**Have you had a cough?**  Yes  No

**Have you experienced shortness of breath?**  Yes  No

**Have you had any cold symptoms?**  Yes  No

**Have you been in close contact with a person who has tested positive for Covid-19?**  Yes  No

**Have you been abroad in the last 2 weeks?**  Yes  No

**Do you feel well?**  Yes  No

- The form is now complete

## 12. Project Features – Check-Ins

The check-ins screen will display a live list of members who have checked into the project via the mobile app.

← Back to project Check-ins report ▾

### Check-ins

SELECT DAY FROM Edit SELECT DAY TO Edit

Feb 22, 2022 Feb 23, 2022

All check-ins are displayed in your local timezone (GMT+1).

**Tue** | Feb 22, 2022

**Alyda Waterworth**

→ 10:25 AM ← 6:27 PM ⌚ 8:02 ⚠️ 📍 Outside project region

You can select the time period you wish to view check-ins between using the date toggles.

Below is a list, sorted by day, followed by:

- **Members Name**
- **Time Checked In**
- **Time Checked Out**
- **Duration on site** – This icon will appear if the duration exceeds 8hrs ⚠️
- **GPS location at time of check-in** – If you have localisation turned on within the project settings, the user's check-in location will be tracked based on the location of their mobile device

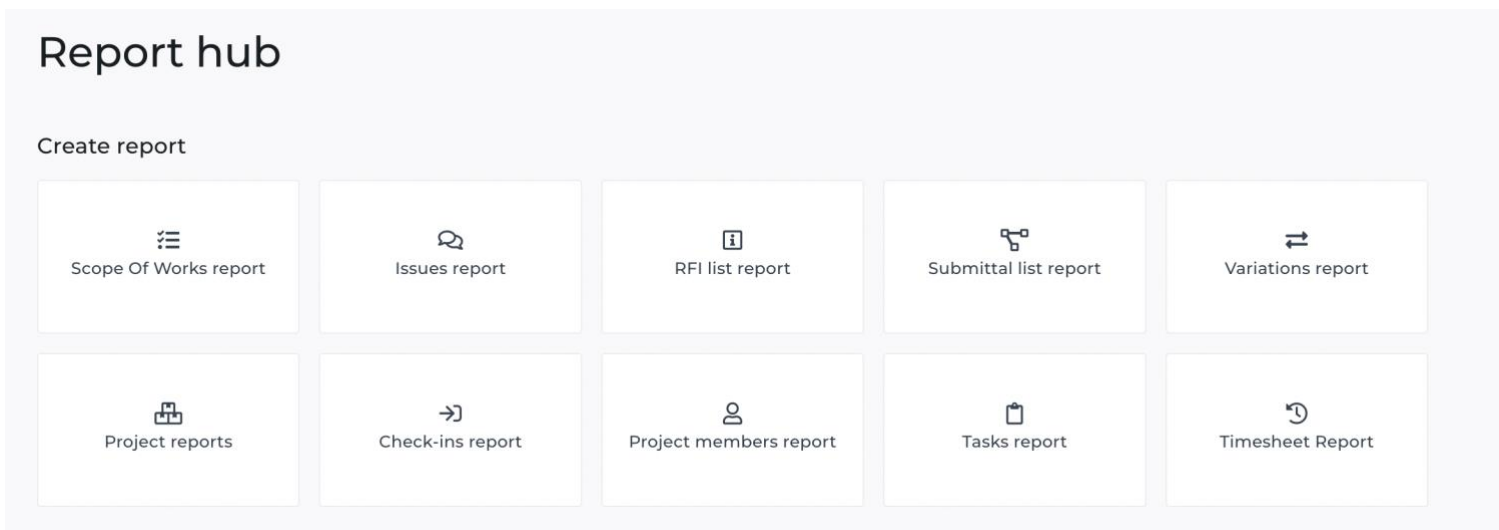


To learn more about Localisation, contact your dedicated Customer Success Manager

# 13. Project Features – Report Hub



The Report Hub is an area for you to pull various reports from Fonn.



1. Select the report you wish to run
2. Follow the on screen instructions to help narrow down your report
  - a. For example; if you would like it in PDF or Excel format, a specific date range, a specific status only etc.
3. The report will appear in the list below as 'Generating'
4. Once it's ready, it will show a blue hyperlink ready for you to download
  - a. Some reports may also trigger an email to your user along with an attachment of the final report
5. This list of reports that have been generated on the project, will appear for Project Managers and Supervisors only.

Other permission roles will see a list based on reports they have ran only.

Generated reports					
Type	Status	Title	Generated at	Created by	Actions
Daily Report	✔	<a href="#">Daily Report - Mar 22, 2022</a>	Mar 22, 2022 (1:17:44 PM)	Alyda Waterworth	<span>⋮</span> <span>🗑️</span>
Daily Report	✔	<a href="#">Daily Report - Mar 11, 2022</a>	Mar 11, 2022 (11:01:16 AM)	Alyda Waterworth	<span>⋮</span> <span>🗑️</span>
Daily Report	✔	<a href="#">Daily Report - Mar 10, 2022</a>	Mar 10, 2022 (11:18:34 AM)	Alyda Waterworth	<span>⋮</span> <span>🗑️</span>

## 14. Project Features – Members

The members list will summarise all users who are a member of this project or have pending invitations to this project

The Members tab will list users who have accepted an invitation to this project. Information is displayed such as:

- **Members First Name**
- **Members Last Name**
- **Contact Info (email/mobile no.)**
- **Status** – Blocked members will no longer have access to this project
- **Role** – The permission they hold within this project
- **Invited by** – The user who invited them
- **Actions** – Additional options to block or edit a member

The Invited tab will list users who have pending invitations to this project. Information is displayed such as:

- **First Name**
- **Last Name**
- **Email** – The email that the invitation was sent to
- **Status** – The status of the invitation ie. pending
- **Role** – The permission role the user has been invited to the project with
- **Actions** – Additional options to delete or resend the invitation

If you have a Project Manager or Supervisor role, you will have the ability to update the members roles (therefore increasing or decreasing their permissions within the project)



To learn more about permission roles, see our Role Permission Matrix [here](#)

Role

Project manager ▼

Client

Contributor

Spectator

Supervisor

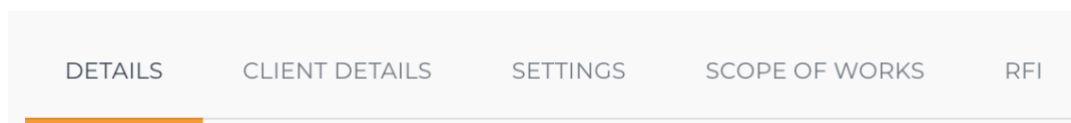
Supplier

## 15. Project Features – Settings

Project Settings can be accessed by Project Managers or Supervisors only.

This information will be setup by Admin users upon creation of the project. In some cases, the information may need to be updated.

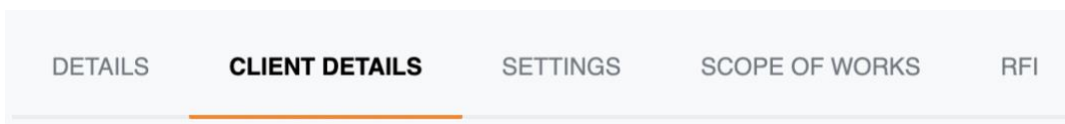
### Details



The details tab will outline information regarding the project itself, such as:

- **Project Location/Address**
- **Main Contact Person**
- **Description/Project Name**
- **Budget & Time Zone**
- **Internal Identification Numbers**

### Client Details



This tab will outline information regarding the client, such as:

- **Client Name**
- **Client Address**
- **Main Contact Person**

## Settings



This tab will enable features within the project to be toggled on/off depending on your project needs

To turn the features on/off, simply click the toggles

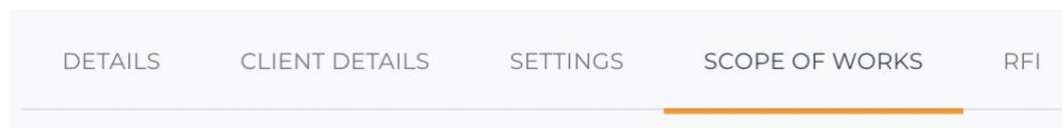
<p><b>Modules</b></p> <p>Enable or disable feature for this project.</p>	<p><b>Scope Of Works</b></p> <p>Make sure your project complies with regional industry standards.</p> <p><input checked="" type="checkbox"/> On <input type="checkbox"/> Off</p>
	<p><b>RFI</b></p> <p>Create and handle Requests For Information.</p> <p><input checked="" type="checkbox"/> On <input type="checkbox"/> Off</p>

You can also mark a project as completed here:

<p><b>Manage project</b></p> <p>Change status of this project</p>	<p><b>Mark project as 'Completed'</b></p> <p>Project members will still have access to the project. However this project won't be shown in general projects statistics.</p> <p><input type="checkbox"/> On <input checked="" type="checkbox"/> Off</p>
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## 15. Project Features – Settings

### Scope of Works



This tab will allow you to configure the settings within the Scope of Works feature. You can enable/disable different fields and also upload your Scope of Works template.



For support with this tab, please contact your dedicated Customer Success Manager

### RFI



This tab is where you will configure the default due date of RFI's on the project