



Account Admin cheat sheet

Project Settings

As an Account Admin you have access to dedicated tools within your Project Settings. Read through the below guides to see what you can do with these tools.

Any questions, please contact your account manager or email support@conqahq.com

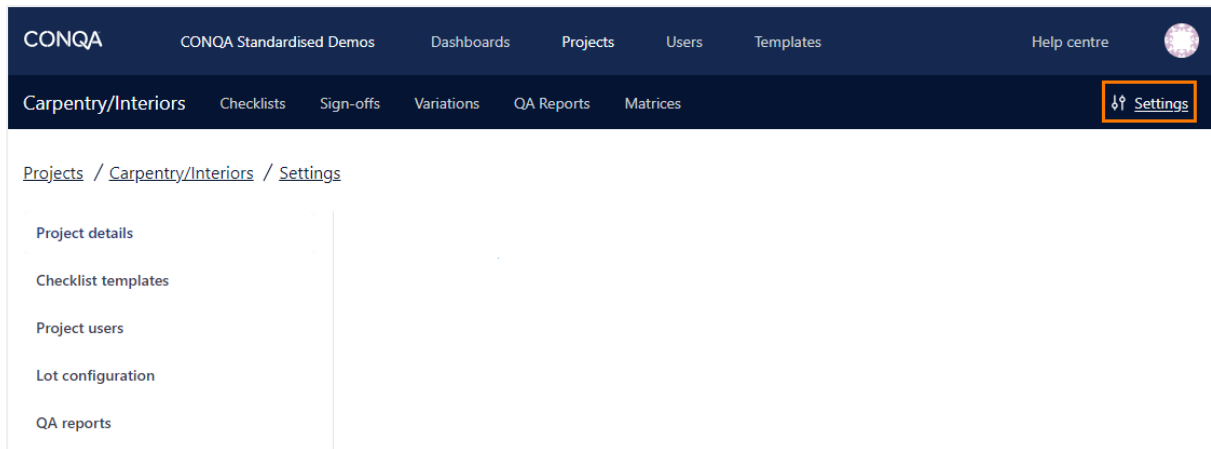
Overview	2
Project details	2
Rename a Project	2
Project Extract	2
Archive Project	3
Checklist Templates	4
Managing your Project's Checklist Templates	4
Removing a Master List template	4
Adding a Master List template	5
Project Users	5
Managing Users on a Project	5
Adding new users to a project	6
Adding existing users to a project	6
Removing users from a project	7
Lot/Item Configuration	7
QA Reports	7
Custom Coversheets	7

This guide was last reviewed October 2024

For the most up to date information please visit the [Project Settings section of our online help centre](#)

Overview

Project Settings can be accessed via Console (account.con.qa) by clicking on the Settings link in the top right



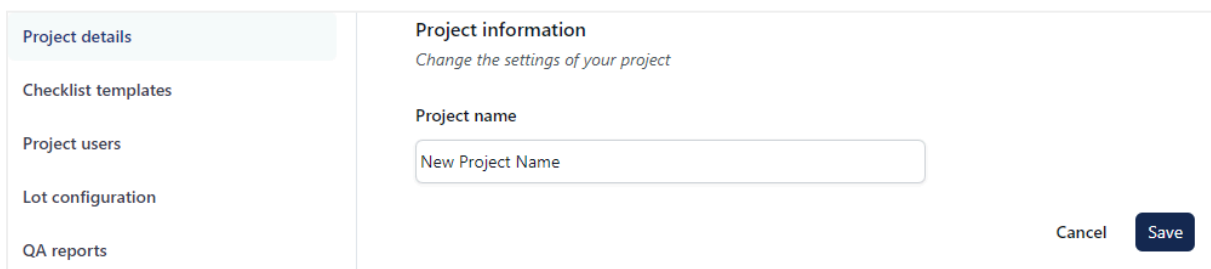
This document will run through the different sections below

- Project details
- Checklist templates
- Project users
- Lot (Item) configuration
- QA Reports

Project details

Rename a Project

[View in Help Centre](#)

A screenshot of the 'Project information' form. The form has a sidebar on the left with 'Project details' selected. The main content area is titled 'Project information' with the subtitle 'Change the settings of your project'. Below this is the 'Project name' section, which contains a text input field with the placeholder text 'New Project Name'. At the bottom right of the form, there are 'Cancel' and 'Save' buttons.

Under Project Information there is a field where you can rename the project. Type in the revised project name and hit Save to update across all of CONQA. Other users will see the new name on the next refresh.

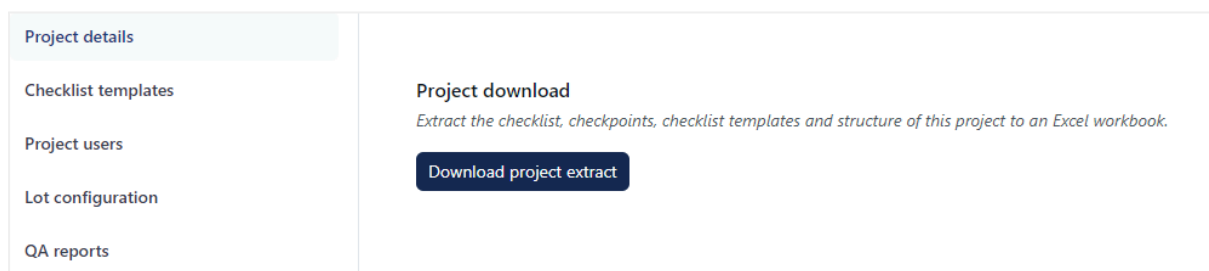
Project Extract

[View in Help Centre](#)

What is an extract?

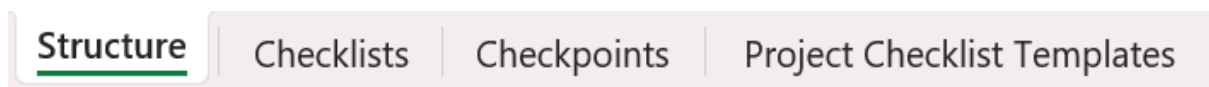
A project extract is a breakdown of the project structure, at the checklist level, checkpoint level, and the checklist templates are available in the project. This is a great reference to use when making changes to the structure of your project, or to the checklist templates. As the extract includes checkpoint and checklist statuses, you can also use this data to generate rich reporting, like pivot tables.

To pull an extract, just hit the Download project extract button under Project download



What is included in the extract?

The extract has four tabs, each including a different set of data out of your project.



Structure: The structure is broken down as one folder or checklist per row, tiered per column to show where each folder/checklist is located. Use this tab for marking up any changes to a project structure to communicate back to the CONQA Support Team.

Checklists: The Checklists tab displays all the checklists instances that exist within your project, along with their statuses and locations. Data from this tab can be used for analysing project progress using Excel pivot tables and charts.

Checkpoints: The Checkpoints tab is similar to Checklists, broken down further to display each specific checkpoint in your project, including their statuses and locations. This checkpoint data provides a more detailed analysis of the state of your project.

Project Checklist Templates: The Project Checklist Templates tab provides a list of all the project specific checklist templates available in your project. The tab includes a breakdown of each checklist template and a usage count from the project. Use this tab for marking up any changes to checklist templates to communicate back to the CONQA Support Team. This is the same format used when creating new checklist templates.

Archive Project

[View in Help Centre](#)

When your project list starts to get long it can affect the loading time of CONQA's account interface. Archiving jobs as you finish work keeps CONQA performing at it's best and avoids unnecessary clutter in the project list, making it easier to find the project you need.

Project details

Checklist templates

Project users

Lot configuration

QA reports

Archive project

Archiving the project will make it unavailable for everyone other than account admins. Use this to remove the clutter when a project is complete.

Archive project

Archiving projects removes all user access, preventing them from completing any new QA, and changing any data or structure. Account Admins will still be able to access the project via Console.

You can also Unarchive the project from this screen

Unarchive project

Unarchiving the project will allow you to grant access to other users again.

Unarchive project

Checklist Templates

Managing your Project's Checklist Templates

[View in Help Centre](#)

Projects / Carpentry/Interiors / Settings / Checklist templates

Download templates

+ Upload spreadsheet

+ Add from master list

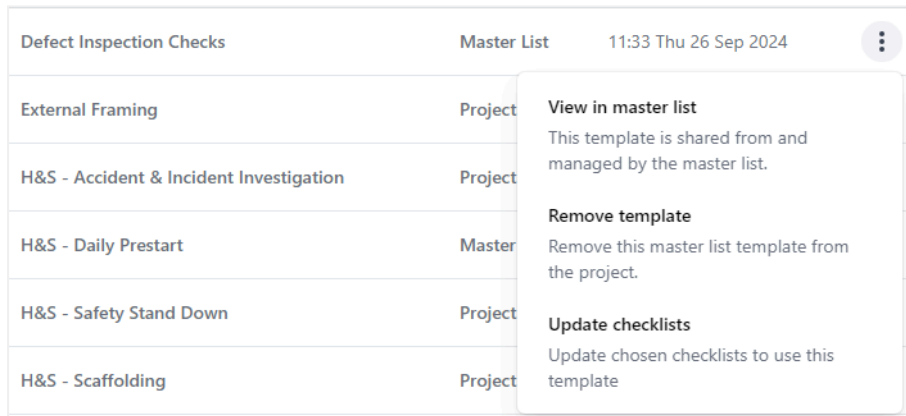
CHECKLIST TEMPLATE NAME ^	SOURCE	LAST UPDATED	
Defect Inspection Checks	Master List	11:33 Thu 26 Sep 2024	⋮
External Framing	Project	08:55 Wed 15 Feb 2023	⋮
H&S - Accident & Incident Investigation	Project	08:56 Wed 15 Feb 2023	⋮

This page shows you all checklist templates in your project library. The source column shows whether this is a checklist template unique to your project or if it is from your account's Master List.

Removing a Master List template

If for any reason you no longer wish for a particular Master List template to be available in the project, you can easily remove it from this screen.

1. Click on the three dots that align with the template to remove
2. Select 'Remove Template' from the options



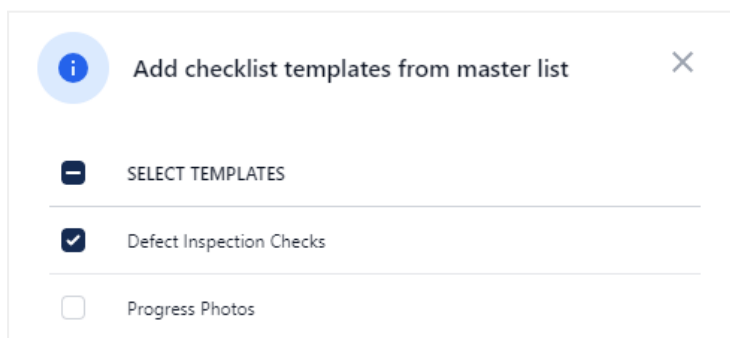
3. Confirm the removal

Adding a Master List template

1. Click on the '+Add from Master List' button in the top right

+ Add from master list

2. Then check next to the templates you which to add, and Save





3. The new template will now show on the Checklist Template list for the project

Project Users

Managing Users on a Project

[View in Help Centre](#)

Projects / Carpentry/Interiors / Settings / Users + Add user

Project details	NAME	MOBILE	EMAIL	JOB TITLE	STATUS	USER ROLE
Checklist templates	Barney Chunn		barney@conqahq.com		Active	Account Admin 
Project users	Cameron Tait-Jones		cameron@conqahq.com		Active	Account Admin 
Lot configuration						
QA reports						

Adding new users to a project

1. Open the project in Console and go to Settings > Project Users
2. Hit the '+ Add User' button
3. Paste the email/s of the new user/s into the text box
4. Select the user role you want to give the new user/s
5. Confirm changes down the bottom


Add users to project
Add a list of user emails to give them access to this project.

Enter users email address

Add emails...

Select a role for new users

Need help? Learn more about [managing users](#) or [contact support](#).

Cancel **Confirm changes** 

Adding existing users to a project


1. Open the project in Console and go to Settings > Project Users
2. Hit the '+ Add User' button
3. Paste the email/s of the user/s into the text box
4. Confirm changes down the bottom

OR instead of pasting in emails, you can scroll through the list of users on this screen and check the box next to the names of the users you want added. You will need to Confirm changes to save.



<input type="checkbox"/>	NAME	MOBILE	EMAIL	▼	JOB TITLE	STATUS	USER ROLE
<input checked="" type="checkbox"/>	Simon Leigh	+64 9 886 4647	simonl@conqahq.com			Active	Site User
<input checked="" type="checkbox"/>	Not registered	—	pete@example.com			Pending	Site User

Removing users from a project

To remove a user from the project, hit the trash can icon next to their name.

NAME	MOBILE	EMAIL	^	JOB TITLE	STATUS	USER ROLE
Barney Chunn		barney@conqahq.com			Active	Account Admin 

This will remove the user from this project only. If you wish to remove other access, you will need to go to the Account User list and edit from there.

CONQA	CONQA Standardised Demos	Dashboards	Projects	Users	Templates	Help centre 
Carpentry/Interiors	Checklists	Sign-offs	Variations	QA Reports	Matrices	 Settings

Lot/Item Configuration

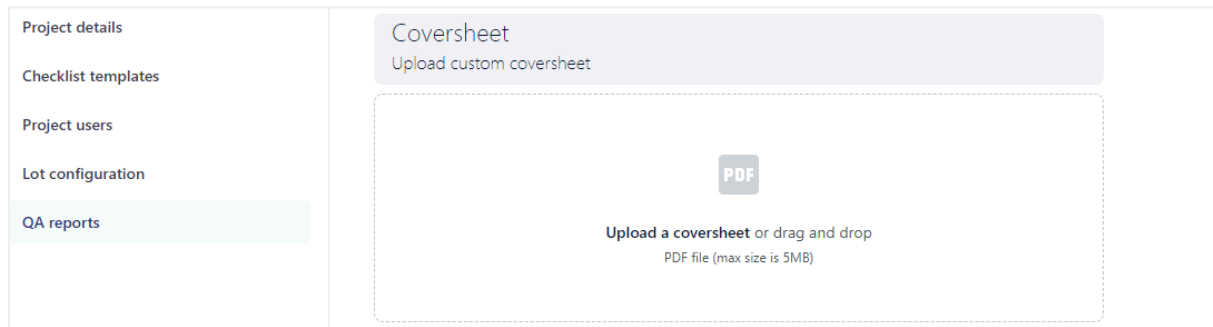
Lot/Item management is an add-on available to some CONQA customers. Ask your account manager if you are interested in learning more about how milestone reporting might help your business.

QA Reports

Custom Coversheets

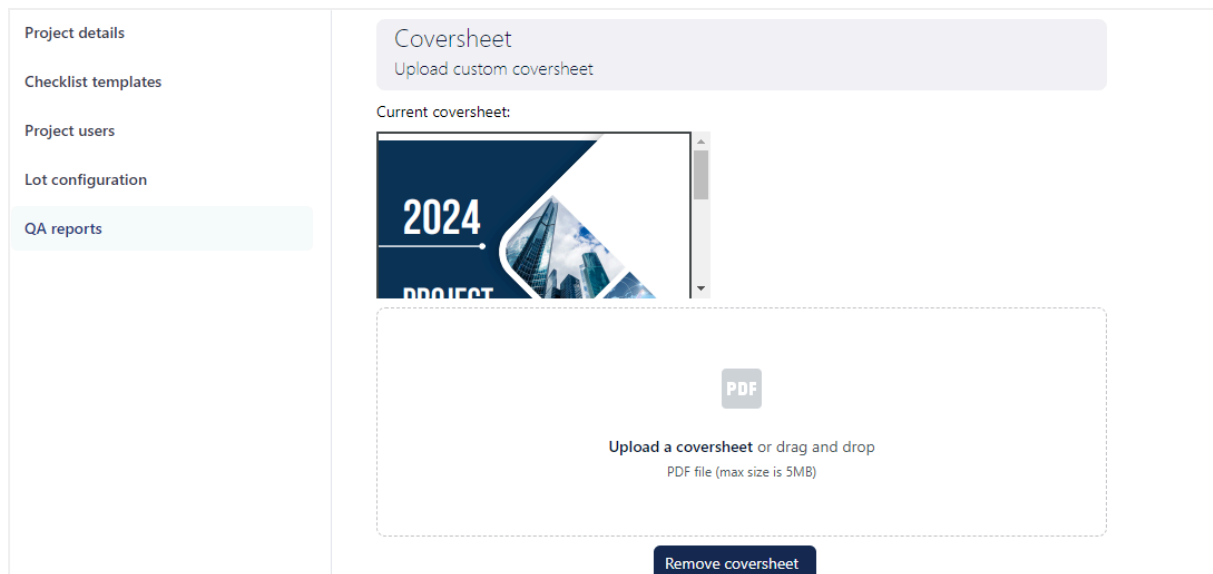
[View in Help Centre](#)

Custom coversheets allow you to add an additional page at the start of your QA Reports generated out of CONQA. This means you can format it as you please to suit the client, project or your own branding.



Coversheets must be uploaded as a PDF. File size should not exceed 5MB and should be set to A4 paper size.

You can replace or remove your coversheet at any time. To replace, upload a new document that will override your existing coversheet. Otherwise remove the sheet to revert back to the default settings.



If you have any questions on any of the above processes, please reach out to your account manager, or contact CONQA's support team:

+64 9 886 4642

+61 3 8001 6045

support@conqahq.com