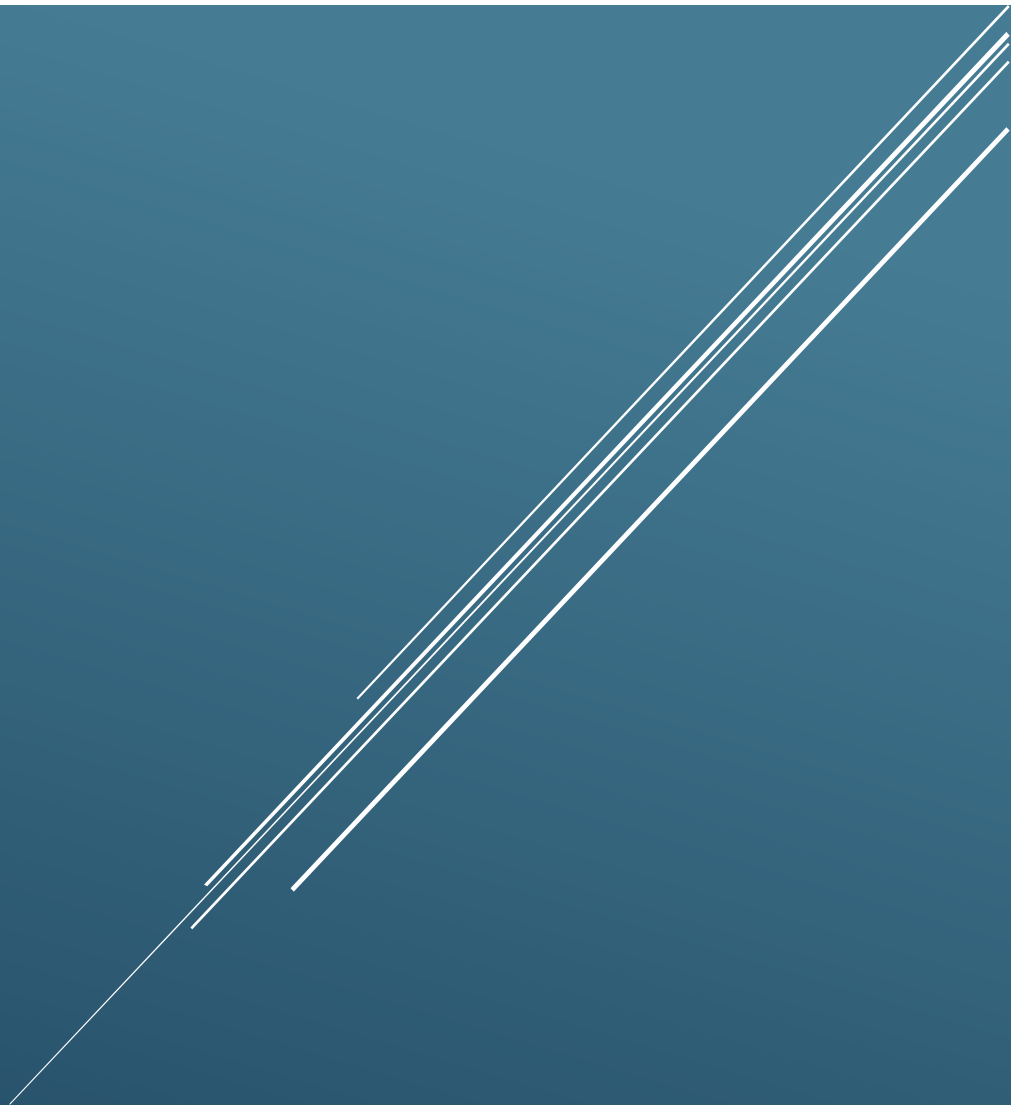




VISION PRO SOFTWARE FUNCTIONALITIES

03/2024

Contents Page

Contents

Contents Page	1
Summary	3
Infinite use cases , solutions for any industry and configurable.....	4
By Sector & Use case	4
Vision Pro Audit Module Functionality	5
Overview	5
Core Functionality	5
Additional Functionality	5
Vision Pro Asset Module Functionality	6
Overview	6
Core Functionality	6
Additional Functionality	6
Vision Pro Asbestos Module Functionality	7
Overview	7
Core Functionality	7
Additional Functionality	9
Vision Pro CAD Module Functionality	12
Overview	12
Core Functionality	12
Additional Functionality	12
Vision Mobile App Functionality	14
Overview	14
Project Types.....	14
Asbestos Module.....	14
Assets Module.....	15
Audits Module	16
Pro Module.....	16
NFC Tag Scan Logging	17
Vision Pro Document Module Functionality.....	18
Overview	18
Core Functionality	18
Additional Functionality	18
Vision Pro Dashboard Module Functionality	19

Overview	19
Core Functionality	19
Additional Functionality	19
Vision Pro API Module Functionality	20
Overview	20
Core Functionality	20
Functionality your developers could create?	21
Core Integrations – Store to be released mid 2024	21
Custom Integrations	23
Vision Pro Report Generator Functionality	24
Overview	24
Core Functionality	24
Additional Functionality	25

Summary

Vision Pro Software is a cutting-edge, cloud-based software solution designed to empower organizations of all sizes to conquer compliance and risk management challenges. Our comprehensive suite of features streamlines workflows, centralizes data, and fosters proactive risk mitigation strategies across various sectors.

Key Features:

Integrated Asset Management: Vision Pro seamlessly integrates asset tagging and geolocation, simplifying asset tracking and audits. Run inspections offline in remote locations with our mobile app, ensuring data synchronization and real-time team updates.

Streamlined Audit Management: Our customizable audit templates empower you to tailor audits to meet your specific needs. Embed asset tags and leverage offline functionality for maximum efficiency, even in challenging environments.

Enhanced Data Visualization & Reporting: Gain a holistic view of your compliance posture with intuitive dashboards and customizable reports. Vision Pro fosters data-driven decision-making and simplifies communication with stakeholders.

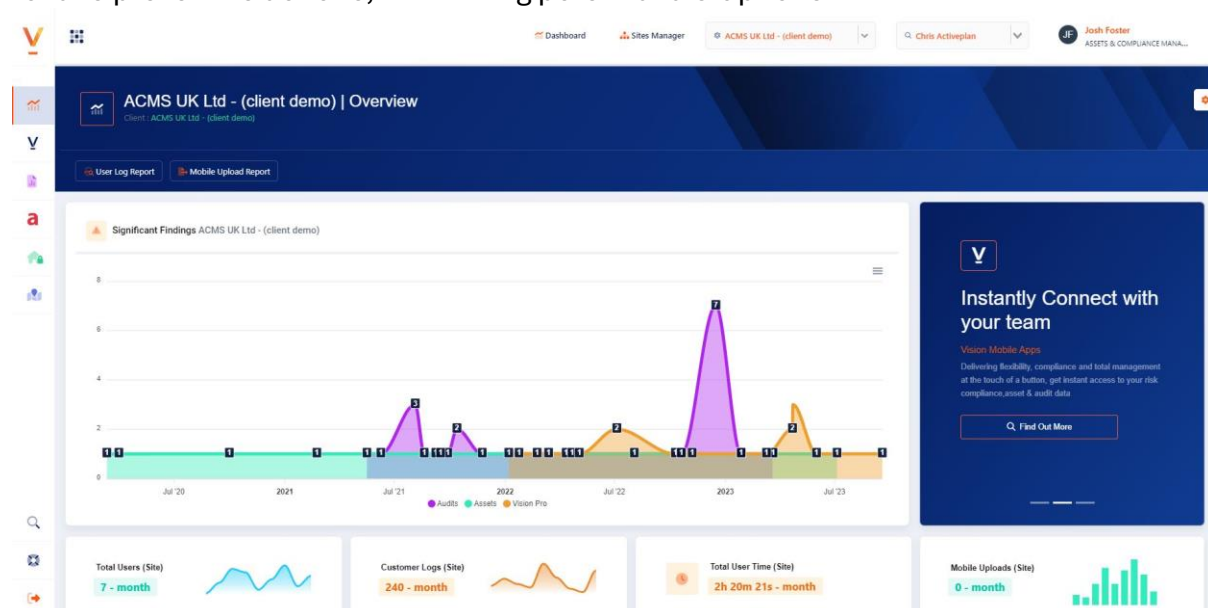
Centralized Risk Management: Consolidate risk assessments, compliance tasks, and audit findings into a single, unified platform. This centralized approach facilitates proactive risk mitigation strategies and ensures regulatory adherence.

Benefits:

Increased Efficiency: Vision Pro automates manual tasks and streamlines workflows, saving you valuable time and resources.

Reduced Costs: Improved compliance efficiency minimizes the risk of fines and penalties, leading to significant cost savings.

Enhanced Risk Mitigation: Proactive identification and analysis of risks empower you to take preventive actions, minimizing potential disruptions.



Infinite use cases , solutions for any industry and configurable

ISO Accreditation
Pre-start safety inspection
Fire risk assessment
Preventative maintenance
Incident reports
Asset cleaning instructions
Site safety audit
Asset inspections
Maintaining compliance

And much more..

By Sector & Use case

ISO 27001 Information Security
ISO 27001 Risk Assessment
ISO 9001:2015 Quality Management
ISO 14001:2015 Environmental Management
ISO 45001:2018 Occupational Health & Safety Management

And much more..

Vision Pro Audit Module Functionality

Overview

The Audits module within Vision Pro can be accessed on the main module menu or within the vision pro module and allows the user to view and edit audits created on site

Core Functionality

- Users can use the site tree to view and navigate through audits
- Users can Create unlimited number of various audit templates
- Users can view, edit, start new, finalize audits via the audits landing page or via the tree
- Users can add photos to an Audit
- Users can add site or/and audit significant findings to an Audit
- Users can add certificates and signatures to an Audit
- Users can add photos to a finding in an audit
- Users can link asset to an Audit
- Users can delete an audit – deleted audit will be archived rather than deleted
- User can produce report based on audit to word or pdf
- Users can view/analyze audit data at site and dashboard level
- Users can check audit history for audit process which allow multiple audits inside process
- Assets has 7 dashboards to tracking:
 - Audit Visits (Month/Week)
 - Audit Statuses
 - Significant Findings
 - Audit Good/Fair/Poor
 - Actions
 - Compliance Status

Additional Functionality

- Users hide unused predefined fields
- Users can add section documents to an audit (if enabled in template)
- Users link assets to audit
- Users can add not only predefined audit question answer types, but defined their own.
- Users can add significant findings to an Audit
- View of audits landing page can be customized by system admins
- Users can use the mobile app to carry out all functions above
- Users can view and upload documents within the mobile app for an audits

Vision Pro Asset Module Functionality

Overview

The Asset module within Vision Pro can be accessed on the main module menu or within the vision pro module and allows the user to view and edit assets associated with a property.

Core Functionality

- Users can use the site tree to view and navigate through assets
- Users can edit assets via the asset landing page or via the tree
- Users can mark assets as pass/fail or other dictionary items
- Users can add photos to an asset
- Users can add photos to a finding in an asset
- Users can delete an asset – deleted asset will be archived rather than deleted
- User can toggle switch to view deleted assets
- User can export all assets to excel at site and dashboard level
- Users can check asset history to see asset changes
- Users can bulk pass/fail assets and date and type of check on the asset landing page
- Assets has 3 dashboards to tracking:
 - Asset assessment status
 - Asset finding priority
 - Asset tasks

Additional Functionality

- Users can upload cad plans to the asset module and mark assets as hotspots on the cad plan
- Users can add documents to an asset
- Users can add temperatures to an asset
- Users can add actions to a finding
- Users can add significant findings to an asset
- Users can define a type of check for an asset on the landing page
- Users can add temperatures on the landing page or directly in the asset edit page
- Users can add tasks to assets on the landing page or directly in the asset edit page
- User can use predefined finding dropdowns for a finding within an asset
- Users can add gps coordinates to an asset in the mobile app
- Users can use the mobile app to carry out all functions above **EXCEPT cad plans**
- Users can view and upload documents within the mobile app for an assets (not documents module but within asset)
- Users can use the tag viewing app with nfc tag to view assets at site/building/floor/room level

Vision Pro Asbestos Module Functionality

Overview

The Asbestos module in Vision Pro allows authorized users to manage a property's asbestos data.

Vision Pro works on the principle of 'asbestos at a location over time', which means that once a location (or sample point) is added to the system, all further works relating to that location (such as re-inspections or remedial works) requires editing the same location within the system. Vision Pro retains a timeline of any changes to the location and thus creates an 'asbestos history' of the property in a single place rather than having to examine multiple survey reports

Access to various aspects of the module is controlled through user permissions and include:

- Editing or adding data
- Deleting data
- Uploading documents
- Manage risk dictionaries
- View asbestos dashboard
- Run reports
- Access the management module
- View the map overview (where available)
- Edit page messages

The asbestos module also links directly to the CAD module as well as the reporting tools if user permissions allow. The functionality available through these is covered in separate functionality documents

The functionality below applies only to users who have the relevant permission

Core Functionality

- Users can add / amend survey information at Site, Building, Floor and Room level. Depending on the level, this could include items such as:
 - Remedial / Removal costs
 - Any surveyor's notes
 - Survey type and date, along with the surveyor's name
 - Whether a room was accessed and if not, why not
- Users can add / amend locations within a room – each location represents a 'point of interest' relating to a survey, such as a sample point or item that could not be accessed.

- Each location has a identifier that is unique for that site to enable lifetime tracking of any ACM using that ID
- Users can add or amend survey data for each location within a room. This includes the following items:
 - Surveyor (Name and company)
 - Survey type
 - Survey date
 - Whether the location in question could be inspected (for example, it may be an electrical cupboard which is locked) and if not, why not
 - If the location requires regular re-inspection and, if so, the next survey date
 - Whether a sample was taken at the location
 - Any sample number – if it is a reference to an existing sample the user can link the location to the original sample
 - Certificate and lab numbers
- Users can add or amend asbestos data for each location within a room. Asbestos data is split into ‘Primary’ and ‘Secondary’ data. Primary data is required as part of HSG264 guidelines and, as such, is used to build a material risk score. The Primary data consists of the following risk items:
 - Product type
 - Asbestos type
 - Damage extent
 - Surface treatment
 - Secondary data is to assist with the ongoing management of any asbestos at the location and consists of:
 - Quantity
 - Position
 - Friability
 - Risk of Damage
 - Action to be taken
 - Status of any action
 - If the location is HSE notifiable
 - If air testing is required
 - Urgency of any required action
 - Surveyor comments
 - Surveyor recommendations
- Primary data can be restricted to pre-defined items through user permissions
- Material risk score is calculated as per HSG264 guidelines, and a material risk rating based on that score is also displayed
- Users can add both images and videos to specific locations
- Users can add or amend standard priority risk assessment details to the location. These are from a pre-defined dictionary only and match up with the recommendations in the HSG264 guidelines. These values are used to calculate a priority risk score which can be weighted by up to plus or minus 5 depending on circumstances

- An overall risk score for each location is calculated using both the material risk and priority risk scores in line with HSG264 guidelines
- Any samples taken can be viewed and bulk updated once results are returned from the laboratory – any locations using the selected sample numbers will be automatically updated to reflect the changes

Additional Functionality

- Sample number confirmation – a location without sample and certificate numbers will not be able to be given an asbestos status of ‘Present’.
- The health and safety status for each location can be set to allow closer management in the future via the asbestos dashboards
- Locations (and their details) can be both copied to other rooms and duplicated within the same room, for speed of data entry – on creation the user will be asked to provide a new location ID for the copy/duplicate
- If available, users can jump from a location to view a plan with the relevant location hotspot (see ‘Vision Pro CAD Module Functionality’ for details)
- Users can switch between ‘details’ view and ‘outline’ view – Details view is the standard and shows each location on its own page while outline view shows a summary of all locations on the same page making it easier to work with larger collections of locations. The summary can be limited to only showing positive and presumed locations. Both Views are shown below

Room: Boiler Room - Location: Pipework Residue [Read Mode]



Location ID: E3 7D C5 12

Description: Pipework residue

Asbestos status: Present

H & S status: Safe and Manageable

Surveyor: . A.N.Other (ADEPT SAFETY SOLUTIONS)

Survey type: Re-inspection

Survey date: 12/10/2020

Inspected: Yes

Re-inspect: Yes

Next survey date: 12/10/2021

Sample taken: Yes Sample references

Sample number	Certificate number	Lab number
Not Specified	123456	

Material
Add Info
Priority

Product type:	Lagging	3
Asbestos type:	Amosite Chrysotile	2
Damage extent:	High damage: Or delamination of material	3
Surface treatment:	Unsealed lagging and sprays	3

Material risk score: 11

Material risk category: High i

Calculated priority risk score: 6

Subjective weighting: 0

Priority risk score: 6

Overall risk score: 17

Details View

 PDF  DOCX ☐ Asbestos only

The Lookout / 00 Ground Floor / Boiler Room											
Description	Location ID	Survey Date	Survey Type	Next Survey Date	Asbestos Status	Sample	MRA	PRA	Risk		
Sample test example	0C 24 DE 59	12/10/2021	Asbestos Management Survey		Not suspected						Inspect Delete
Roof Void	33 2F 36 B5	14/03/2018	Asbestos Management Survey		Removed						Inspect Delete
Pipework residue	40 3D 3F 2A	16/05/2023	Re-inspection		Removed						Inspect Delete
Amosite Chrysotile											
Residue to walls	80 69 43 5E	27/09/2017	Re-inspection		Removed						Inspect Delete
123	89 B9 8A 86	18/10/2019	Asbestos Management Survey		Not suspected						Inspect Delete
Bitumen, No asbestos detected, Good condition: No visible damage, Composite materials containing asbestos											
Pipework residue	B7 F0 BB 31	16/05/2023	Reinspection Survey	28/09/2022	Strongly presumed		11				Inspect Remove Delete
Lagging, Amosite Chrysotile, High damage: Or delamination of material, Unsealed lagging and sprays											
Pipework residue	B8 C4 28 AF	29/04/2021	Refurbishment Survey (HSG264)		Not suspected						Inspect Delete
Sample test 2	B8 D1 E4 6F	12/10/2021	Asbestos Management Survey	12/10/2022	Not suspected						Inspect Delete
Asbestos-reinforced Composites, Amphibole asbestos excluding Crocidolite, High damage: Or delamination of material, Sealed Composite Materials											
Pipework residue	E3 7D C5 12	12/10/2020	Re-inspection	12/10/2021	Present		11	6	17		Inspect Remove Delete
Lagging, Amosite Chrysotile, High damage: Or delamination of material, Unsealed lagging and sprays											
Test location	SH002	30/06/2021	Asbestos Management Survey		Removed						Inspect Delete
Positive sample	SH005	27/09/2021	Management Survey	27/09/2022	Present		11				Inspect Remove Delete
AIB, Chrysotile (white), High damage: Or delamination of material, Textured Coating											
Sample result 1	SH006	27/09/2021	Asbestos Management Survey		Removed						Inspect Delete

Outline View

- Bulk re-inspections – Users can update in bulk any locations included in a re-inspection from a single page. This should only be done when the locations are unchanged since the last inspection. The following can be set on this page and applied to all selected locations:
 - surveyor
 - survey type
 - survey date
 - job status
 - additional comments
- Users with permission can run basic, stock reports for the selected site. The standard reports are:
 - On-Site asbestos register
 - Location sheets
 - Location sheets with area notes
 - Asbestos management plan

- Users with permission can download a Report Generator Package which can be used with Report Generator (a separate Windows application) to generate more complex, bespoke reports

Vision Pro CAD Module Functionality

Overview

The CAD module within Vision Pro can be accessed either through the Asbestos or Asset modules and allows the user to view and mark up plans associated with a property.

Access to the CAD module is controlled by a user's security settings so the functionality detailed below only applies to authorized users

The functionality detailed below is only available via the main Vision Pro website, it is not currently available on any associated mobile applications

Core Functionality

- Users can upload plans, in DWG, DXF, PDF or jpg format into the system
- Users can view uploaded plans on a per-site basis
- Users can use basic CAD viewport functions such as zoom, zoom extents and move
- Users can add 'location hotspots' to the plan to represent the location of a specific asbestos sample or asset
- Users can add 'area hotspots' to the plan, these are polygon shapes that can represent a room or specific area of interest
- Users can switch between Asbestos and Asset modules to view related hotspots
- Selecting ('clicking') on a hotspot takes the user to the relevant location or area within the Vision Pro system

Additional Functionality

- When viewing a location or room within Vision Pro, users can click a button which will open up the plans window, load in the relevant plan and zoom in on the relevant hotspot (assuming a hotspot was previously created)
- Users can delete existing hotspots
- Users can change the location hotspot size for individual plans to allow for different plan scaling
- Users can show / hide the text labels associated with location hotspots
- Users can temporarily remove all hotspots from the plan
- Users can print, or print to PDF, the plan including the hotspots
- Users can download a copy of the plan
- Users can delete the plan
- There is simple editing functionality allowing users to:

- Remove elements of the plan
- Draw simple shapes
- Add additional text
- Move selected elements
- Copy selected elements
- Scale selected elements
- Rotate selected elements
- Add pre-defined elements
- Users can save the plan, either replacing the existing one or creating a new one, which is added to the list of plans for that site
- Users can create a new blank plan which can then be edited as above

Vision Mobile App Functionality

Overview

Vision Mobile app allows authorized users to manage a property's asbestos and asset data, manage site findings, and conduct audits.

The app operates on per-project basis. A project contains data for a single site. Multiple projects per site are not allowed.

The app operates in offline mode. Internet connection is required only when creating (downloading) projects and uploading modified projects to server.

Users with read-only access cannot edit module data, but can view it in read-only mode.

Some features supported by the Vision Web app are not available in the mobile app:

- Dictionaries management
- Audit template management
- Asset type management
- Pro worksheets management
- Uploading videos

Project Types

The following project types are supported:

- **Standard** – users can download data for one or more modules. For Audits module, can select certain templates and optionally download archived audits. Per-building downloads are supported.
- **Assets Inspection** – users can download data for individual assets.
- **Site Audits** - users can download data for individual audits.

Asbestos Module

The Asbestos module allows authorized users to view and edit asbestos data for a property.

Core Functionality

- Users can download assets data for a whole site/selected buildings using Standard projects
- Users can use the site tree to view and navigate through buildings, floors, rooms, and locations
- Users can view, and edit/add/delete site building, floor, and room properties using the tree
- Users can add and edit survey information at site, building, floor, and room level
- Users can add and edit locations within a room

- Users can delete locations – deleted locations that existed in a downloaded site will be archived rather than deleted. A location created within the app will be deleted permanently
- Users can take samples for locations, as well as reference other locations as samples
- Users can add photos from camera and gallery to locations, and delete existing photos
- Users can add, edit, and delete priority assessments for locations

Additional Functionality

- Locations can be copied to other rooms and duplicated within a room
- Users can watch videos for a room (requires Internet connection)
- Users can watch videos for a location (requires Internet connection)
- Users can write NFC tags for sites, buildings, floors, and rooms
- Users can write NFC tags for locations
- Users can navigate to sites, buildings, floors, rooms, and locations by scanning NFC tags

Assets Module

The Assets module allows authorized users to view and edit assets associated with a property.

Core Functionality

- Users can download assets data for a whole site/selected buildings (when using Standard projects) or individual assets (when using Asset Inspection projects.)
- Users can use the site tree to view and navigate through buildings, floors, rooms, and assets
- Users can use the list view to filter assets on per-room basis
- Users can view, and edit/add/delete site building, floor, and room properties using the tree
- Users can view and edit asset properties using the site tree or list view
- Users can mark assets as pass/fail or other dictionary items
- Users can add photos from camera and gallery to an asset, and delete existing photos
- Users can add significant findings to an asset
- Users can add photos to a finding in an asset and delete existing photos
- Users can delete assets – deleted asset that existed in a downloaded site will be archived rather than deleted. An asset created within the app will be deleted physically

Additional Functionality

- Users can bulk edit assets by scanning their tags or creating a list manually, and editing the fields they have in common
- Users can view, add, and delete documents for an asset
- Users can add, edit, and delete temperatures for an asset
- Users can add actions to an asset
- Users can add and complete tasks to assets
- Users can add GPS coordinates to an asset
- Users can perform audits for an asset
- Users can watch videos for an asset (requires Internet connection)

- Users can write NFC tags for sites, buildings, floors, and rooms
- Users can write NFC tags for assets
- Users can navigate to sites, buildings, floors, rooms, and assets by scanning NFC tags
- Assets can be copied to other rooms and duplicated within a room

Audits Module

The Audits module allows authorized users to view and edit audits for a site.

Core Functionality

- Users can download audits data for a whole site/selected buildings (when using Standard projects) or individual audits (when using Site Audits projects).
- Users can use the site tree to view and navigate through buildings, floors, rooms, and audits
- Users can view, and edit/add/delete site building, floor, and room properties using the tree
- Users can view, edit, start new, finalize audits via the tree
- Audits can be edited in worksheet mode (all sections/questions are visible) and in single question mode (with next/previous question navigation)
- Users can add photos from camera and gallery to audit questions, and delete existing photos
- Users can add site or/and audit significant findings to an Audit
- Users can add certificates and signatures to an Audit
- Users can add photos to a finding in an audit
- Users can delete an audit – deleted audit that existed in a downloaded site will be archived rather than deleted. An audit created within the app will be deleted permanently

Additional Functionality

- Users can view, add, and delete documents for audit sections
- Users can link assets to audit
- Users can add actions to audit questions
- Users can write NFC tags for sites, buildings, floors, and rooms

Pro Module

Core Functionality

- Users can download Pro data for a whole site using Standard projects. Data includes audit worksheets, assets, and site findings.
- Users can view, edit, start new, finalize audits via the list of worksheets
- Users can use the site tree to view and navigate through buildings, floors, rooms, assets, and site findings
- Users can view, and edit/add/delete site building, floor, and room properties using the tree
- Users can manage site findings using the site tree

- Users can manage assets using the site tree. The functionality is identical to the Assets module

Additional Functionality

- Users can add photos from camera and gallery to site findings, and delete existing photos
- Assets and findings can be copied to other rooms and duplicated within a room

NFC Tag Scan Logging

When users scan NFC tags, corresponding log entries are created. When projects are uploaded to Server, these entries are moved to Vision customer databases so that they can be examined in the Customer Log page by selecting “NFC Tag Scan” actions.

Vision Pro Document Module Functionality

Overview

The Documents module can be used in conjunction with any of the other modules within Vision and allows the storage of documents

Core Functionality

- Users can upload documents in to Vision Pro Software portal
- Users can download documents from the Vision Pro Software portal
- Users can delete documents from the Vision Pro Software portal
- Documents can be added to Audits and Assets

Additional Functionality

- Users can upload documents on a per-site basis
 - Users can choose to share the document across the entire estate
 - Users can drag and drop documents to upload into Vision platform or browse from the Vision platform and find the location of stored document to upload
 - Users can Preview documents held in Vision before downloading
 - Users can download documents from the Vision Pro software platform
 - Access to documents can be restricted to per user basis
 - Notifications can be setup to let users know when documents are expiring
 - Users edit the documents locally and upload them to Vision Pro Software portal
- ".rtf", ".txt", ".xls", ".xlsx", ".ppt", ".pptx", ".mdb", ".pdf", ".doc", ".docx", ".dot", ".dotx", ".accdb", ".csv", ".avi", ".mp4", ".mov", ".mp3", ".mpeg", ".mkv", ".m4v", ".wma", ".wav", ".msg", ".dwg", ".dxf", ".odt", ".bmp", ".heic", ".jfif", ".bmp", ".heic", ".jfif", ".jpeg", ".jpg", ".png", ".gif", ".tif", ".tiff",

Vision Pro Dashboard Module Functionality

Overview

The Dashboard module in Vision displays graphically what data is being uploaded into Vision. The dashboards take data that has been uploaded by surveyors and turns it into useful information displayed graphically

Core Functionality

- Display charts as visuals to show information
- Provide in depth detail in in drill downs

Additional Functionality

- View data based on Site
- View data across Estate
- Export data
- Restrict User Access
- Customize Charts
- Able to navigate to data source
- Real time data updates
- Historical data analysis
- Variety of Chart Type e.g. Bar chart, Line Graph, Pie chart

Vision Pro API Module Functionality

Overview

With our **RESTful API**, you can view, create, or edit and Archive resources in any Vision Pro API build. To use the API, you must authenticate your application using OAuth2. This page describes how to register your application and obtain, use, and refresh OAuth2 access tokens.

Get your client id and begin running api calls please find the documentation here <https://app.visionprosoftware.com/Api2/api-docs/index.html> for our API library , (Build 1.2) Core functionality found under Active Plan

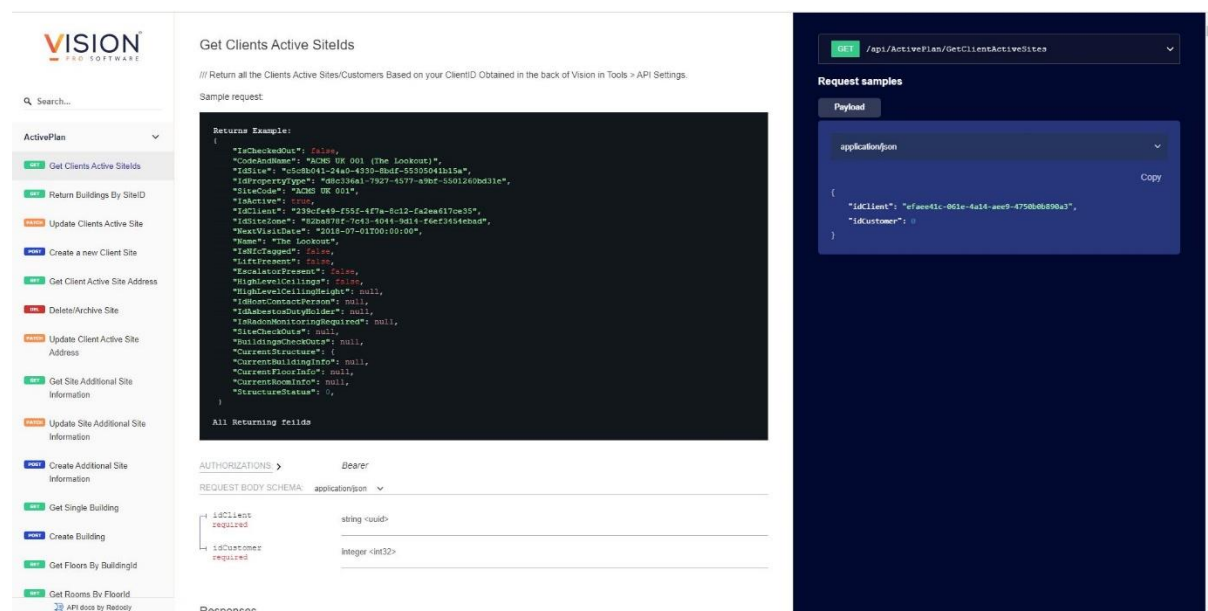


Fig 1: This is our documentation for our API and what results and keys you will need to put in to create edit and archive data if necessary.

Core Functionality

- Create Sites remotely from another system
- Create an build up profile information and addresses
- Create a Floor / Room within any given site
- Create Asset Types
- Create Assets and upload images remotely.
- Call all Assets based on there significant finding and dates
- Create multiple bulk uploads of room data
- Create Users on Vision Pro
- Call Important Dashboard Live Data – Statuses – Reports
- Create Actions (Zapier /Make /Custom) to 5000+ mainstream applications

- Create Users and API Key Connections via API Application in your customer admin account in Vision Pro Tools Menu Assign Single or multiple connections.
- Get the latest Audit information on status for your sites
- Get all audits that contain Assets
- Return all buildings statues that contain Asbestos and there Job status dates
- Get All Asbestos Locations Requiring Action

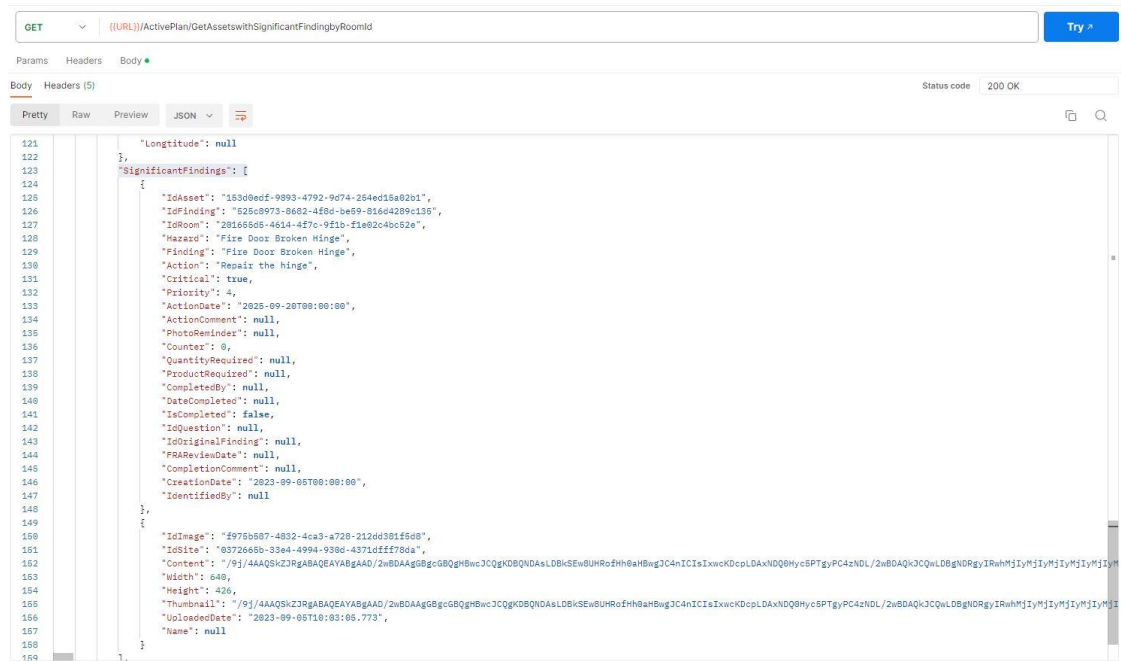


Fig 1.1 : Example of some returning banded data from multiple places within Vision PRO

Functionality your developers could create?

Not limited to here are some examples:

- Pull your live data into your own system or Dashboards to CAFM
- Call data into your own mobile applications
- Provide data for individual customers of your own within Vision Pro to their systems
- Schedule Reports based on status changes from the API
- Inject your own status changes that we then hook too and return.

Core Integrations – Store to be released mid 2024

Zapier - Connect Vision to over 5000+ mainstream Applications including the Latest AI applications.

Examples below are Zaps a user can setup without touching code.

- Call your data into PowerBi and email monthly reports to the team
- Create Chain Actions based on Trigger information with-in VisionPRO

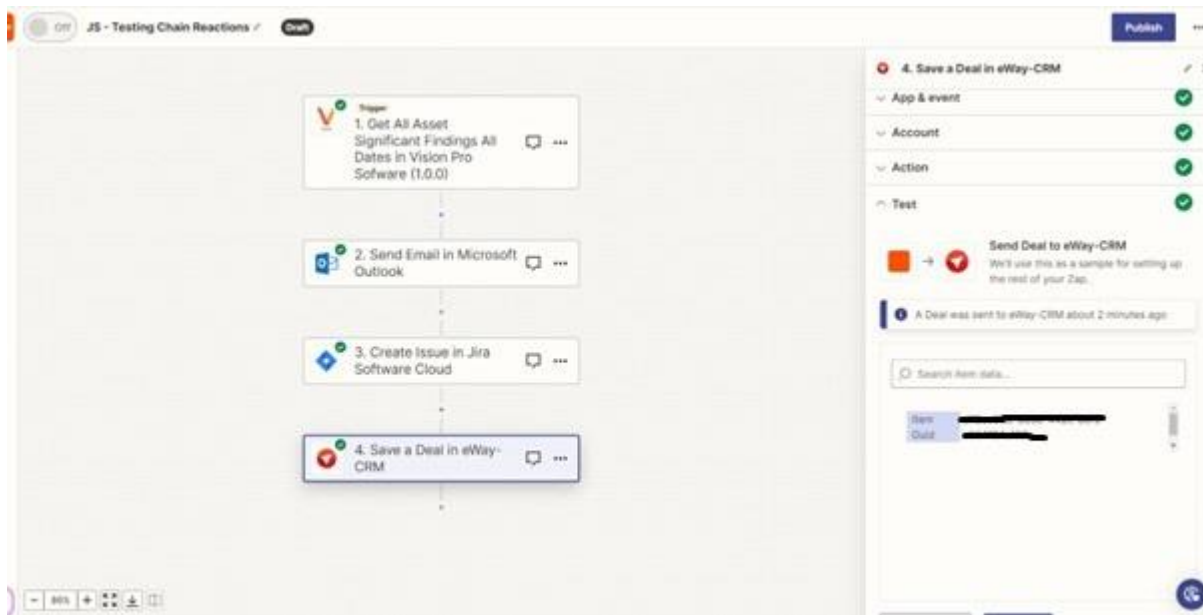


Fig2 : In this example when a Significant finding changes status the (Zap) will send actions across 4 products in this example a user will get notified by email a calendar event added to their outlook calendar > then create a issue in jira > then finally take all that information and save deal in eWay CRM this is just an example of the power of Vision Pro Coupled with your day to day applications.

Please find a small selection of API Connections you could connect to with Vision PRO

1. Outlook
2. QuickBooks
3. Xero
4. Google Sheets
5. Slack
6. Trello
7. Jira
8. Salesforce
9. HubSpot
10. Mailchimp
11. Microsoft Office 365
12. Zendesk
13. DocuSign
14. Asana
15. Basecamp
16. GitHub
17. FreshBooks
18. Zoom
19. Intercom
20. SurveyMonkey
21. Typeform
22. Google Forms
23. Dropbox

- 24. Box
- 25. Evernote
- 26. Todoist
- 27. Microsoft Teams
- 28. Google Calendar

And much more....

Custom Integrations

Custom integrations take you outside the pre build setup of both Vison PRO and the API System you are wishing to connect to for example Closed API Systems or in a use case where you needed to go outside the available data calls.

Example : Simpro lifecycle hooks we have with Vision PRO

You can build up any api calls with our current logic in any module or We can build up any custom logic and calls for you based upon development request these can include webhooks or specific actions that may related to your own data or Guid keys.

VisionPRO API Can be customized to suit your individual business setup and needs.

Vision Pro Report Generator Functionality

Overview

- Vision Report Generator is a stand-alone desktop application that uses mail merge to create 'subdocuments' that can be combined to make custom asbestos reports.
- Users with the correct permissions can download an asbestos data file (called a 'vrp' for 'Vision Report Package') which is used within Report Generator to provide the data source for the mail merges

Core Functionality

- Users can run any report by specifying the location of the report template files and the asbestos data package
- Users can create custom Word mail merge documents which can be used as a 'subdocument' (for example, a table of areas not accessed or a table of positive asbestos locations). These subdocuments can use asbestos location data ('location-based') or area information ('area-based')
- Users can create several 'master documents' which can include boilerplate text along with up to 3 area-based subdocuments and 10 location-based subdocuments. These master documents can also include site-level data such as client, address and so on
- Users can combine a master document with area and location subdocuments to produce a complete report – the subdocuments will contain the asbestos data, generally in table form and the master document will contain the body of the report
- Each subdocument can have various filters applied to it to allow only the required data to be included. There are different filters for area and location data and are listed below.

The Area filters are:

- Is the area surveyed (yes, no, any)
- Does the area contain Permit To Work locations (Ignore, only PTW locations)

The location filters are:

- Was the location surveyed (yes, no, any)
- Asbestos Status (any combination of the various statuses is allowed)
- Does the location have a photo (yes, no, any)
- Does the location have a sample number (yes, no, any)
- Does the location have a lab certificate (yes, no, any)
- Has the location had a priority risk assessment (yes, no, any)

Additional Functionality

- Reports can be run against a single data file or in bulk against multiple data files
- Reports can be run across a whole site or against a single building
- Reports can be configured with up to 15 'custom fields' which can contain any data not included in the asbestos data package (such as 'Auditor Name' or 'Analyst Name') for inclusion in the finished report
- Users can select a custom set of data for which a report will run against (such as a specific set of rooms that underwent a refurbishment survey)
- Users can further filter a report to only include 'Safe and Manageable' locations or those locations that require further action
- Headers and Footers can also contain site-level information
- Within the report, cells within tables can be set to have coloured backgrounds depending on requirements (for example, a user may want positive locations to show the word 'Positive' with a red background), there are a set of 9 default colours but users can use RGB values to have any colour they want
- Users can use the material risk value to determine the maximum risk value for the whole report and include both the value and the text name for the rating ('high', 'medium', etc.)
- Users can hide or show text in the report based on the text name for the overall maximum risk value
- Users can change the default values for the site risk rating if required, by default they are set to the standard values recommended by HSG264
- Images within the subdocuments and the master document can be resized before the report is generated to better fit the required layout
- Users can choose between a blank placeholder or placeholder text for any locations / areas without an image (this only applies if images were included in subdocuments)
- Users can choose between having dots linking section names with page number in the table of contents or just using spaces (usually done for clarity)
- Users can change the text displayed for any empty location data fields (for example, displaying 'N/A' when the 'Condition' field is blank for a negative location)
- Users can change the text displayed when there is no data for a subdocument (for example, when there is a subdocument for non-accessed areas but all areas at the site were accessed)
- The application automatically checks for any update when opened and then gives the user the option of updating automatically or downloading the update to manually run later