



# SURVEY WRITING SOFTWARE QUICK START GUIDE

FOR HOME & BUILDING SURVEYS

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Welcome to Skyline. This Quick Start Guide will help you get up and running in the shortest time possible and with the minimum of disruption to your normal working cycle.

If you need help at any time the quickest route is via the Support button that you will find at the top of every page on the Skyline platform.

**In this guide, actions are shown in red and information in blue.**

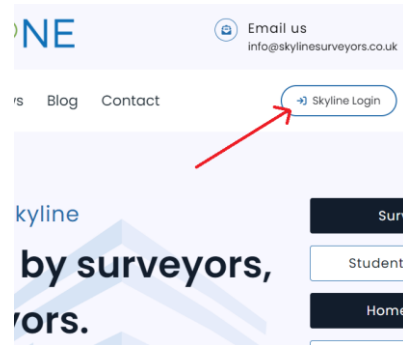
## 1. System requirements & Navigation

Logon using Google Chrome.

Although Skyline will operate with Edge, Firefox, Safari etc, it is most reliable and stable in Chrome.

Log on using the URL

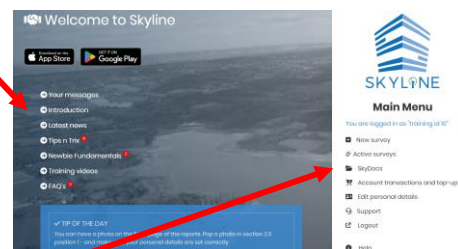
<https://www.skylinesurveyors.co.uk>



Enter your Username and Password



Note the useful information to the left side of the screen



Explore the navigation menu to the right side of the screen

- New Survey                      Create a new survey report
- Active Surveys                Home to your templates and any currently live surveys reports
- SkyDocs                         A selection of survey samples, site notes and other useful information documents

## Account transactions & top-up

View your last 20 transactions and securely add credit to your account

Edit personal details

Update your contact details

Support

Use the support form to get the quickest response to any questions

Logout

Cheerio until we see you next time

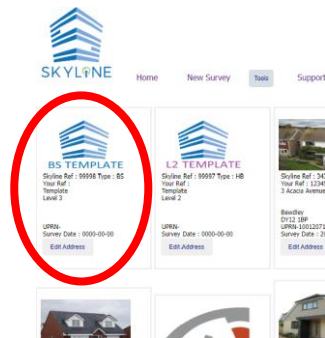
Help

What's on the list you've just read

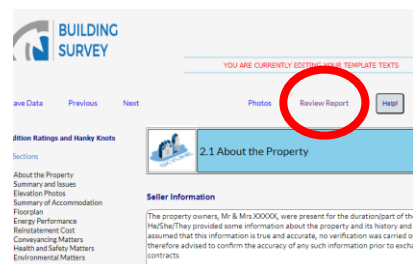
## Navigate to "Active surveys"

Identify your two personal templates, one for Level 2 (Home Buyer, Home Condition, Buy-To-Let) reports, and one for Level 3 Building Survey (BS) reports  
Any text you enter into your templates will be copied into your next new report.

Click the icon to open your BS template

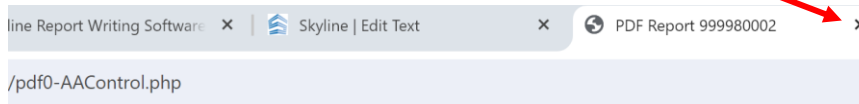


Click Review Report to generate a PDF and review what a finished report will look like

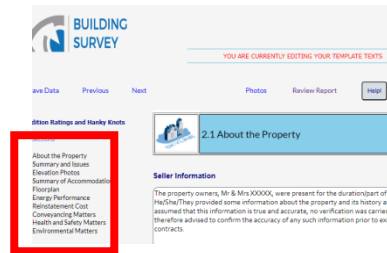




When you're finished, close the PDF window,  
leaving you back on your live template page

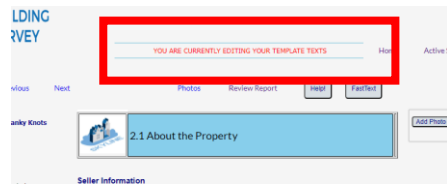


Practice navigating around the report  
using the menu to the left  
DO NOT make changes to any of the  
text in your template at this stage



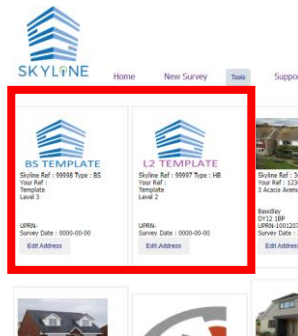
## 2. Templates

STOP - Red text at the top of your report indicates you are editing your template text. Only do this to include text that you want repeated in every subsequent report

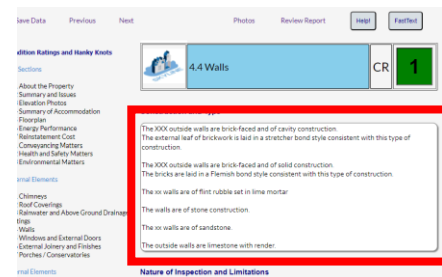


In a live survey report the red text is replaced with the specific property address. Each time you select a New Report then the system will copy all the words from your template into your new report

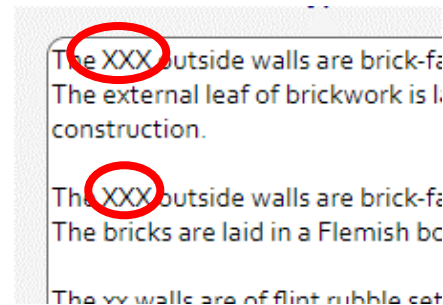
Your two templates are separate and changes made to one will not be reflected in the other.



Templates can include multiple options for all the features you encounter regularly.



Two or more xx's will trigger an error report as a reminder to remove incorrect descriptions and validate correct ones



### 3. New report, text input & condition ratings

Click Home

Click New Survey

Select report icon

Click on a survey image to select survey type



Start typing address into Address Search bar

Select options

“None” removes any mention of valuation or reinstatement from the report

“Leasehold” will add some additional apartment-specific information into your report

**Property Details**

Address Search and autofill

Address line 1

Address line 2

Address line 3

Town

Postcode

LPRN

Date of survey

Client name

Surveyor reference

Tenure

Freehold  Leasehold

Re-instatement Cost and/or Valuation with this survey?

Re-instatement Only  Val Only

Re-instatement and Val  None

Select “Use Template”. Blank option should

Only be used in exceptional circumstances

Conflicts of interest?

Client agreed specific exclusions?

Use Template or blank?

Use Template  Blank Report

**Purchase and Create a Report**

Opening your new report you will find that all the words from your template appear. These can now be deleted and altered as you wish.

Text input

You need to put text in all text boxes to avoid an error report\*

Sections 2 & 3 are general information boxes

Sections 4-7 are the main elements with condition ratings

Add/delete/amend text by

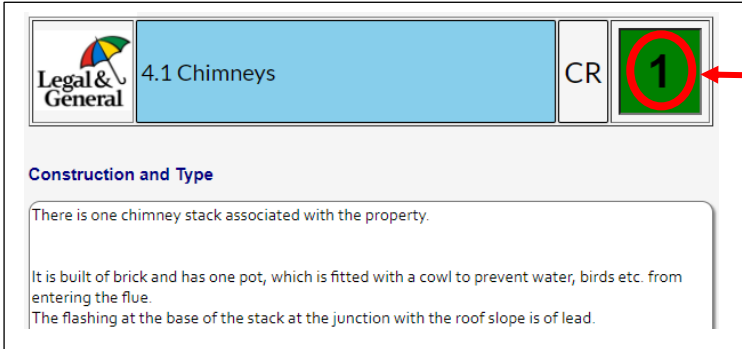
Typing

Copy & Paste

Voice-to-text (you'll need an external programme)

\*In sections 4-7 the final “Additional Information” box in each element will not be published if it contains no text – use this to provide additional information that a client may have requested or that you feel is notable over and above standard information.

Live surveys are located in Active Surveys



The screenshot shows a survey form for '4.1 Chimneys' under the 'Legal & General' logo. The form includes a 'CR' (Condition Rating) field with a green box containing the number '1', which is circled in red with an arrow pointing to it. Below the title, there is a section titled 'Construction and Type' with a text area containing the following text: 'There is one chimney stack associated with the property. It is built of brick and has one pot, which is fitted with a cowl to prevent water, birds etc. from entering the flue. The flashing at the base of the stack at the junction with the roof slope is of lead.'

Double click condition rating, type number required, press enter

Condition ratings available are:-

- 1 No repair required, normal maintenance only
- 2 Repair required but it is not major or urgent
- 3 Major, urgent or costly repair, or further investigations, required
- HS Health & Safety risk (potential or actual)
- NI Not inspected – no access
- NA Not applicable, not present

If NI or NA selected then all but the top “condition” box will be removed – you must type some text in the remaining box

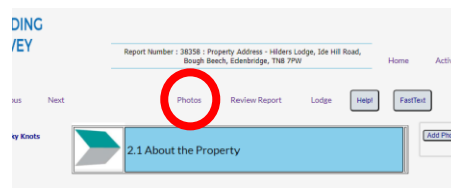
If NA selected for 5.9 (loft conversions) or 5.10 (basements) then the element is removed

#### 4. Photo management

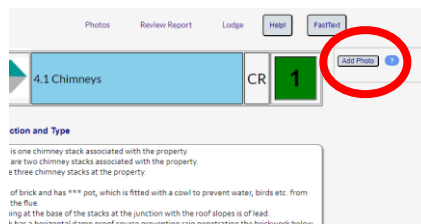
All uploaded images must be in JPEG format (not PNG, PDF, TIFF, GIFF, HEIC\*)

There are two ways to add photos to your report

- a) **BULK** - On the Photos page, drag'n'drop up to 30 **RESIZED** photos at a time.



- b) On the elements pages, drag single **UNRESIZED** photos one at a time



- a) Bulk upload

Click to go to Photos page.

Reduce photo file size to <200kb using resizing tool such as Windows resizing tool which is part of the PowerToys suite. You can download it <https://apps.microsoft.com/detail/xp89dcdgq3k6vld?hl=en-us&gl=GB>

On iPad go to Files and long press on image file to open menu. Select Quick Actions/JPEG/Medium

Browse to or drag up to 30 resized images at a time

Click **SAVE CHANGES** bar to save

Use drop down menus to locate images and type captions

- b) Single upload

In any element of report

Images can be any file size but must be **JPEG**

Click "Add Photo"



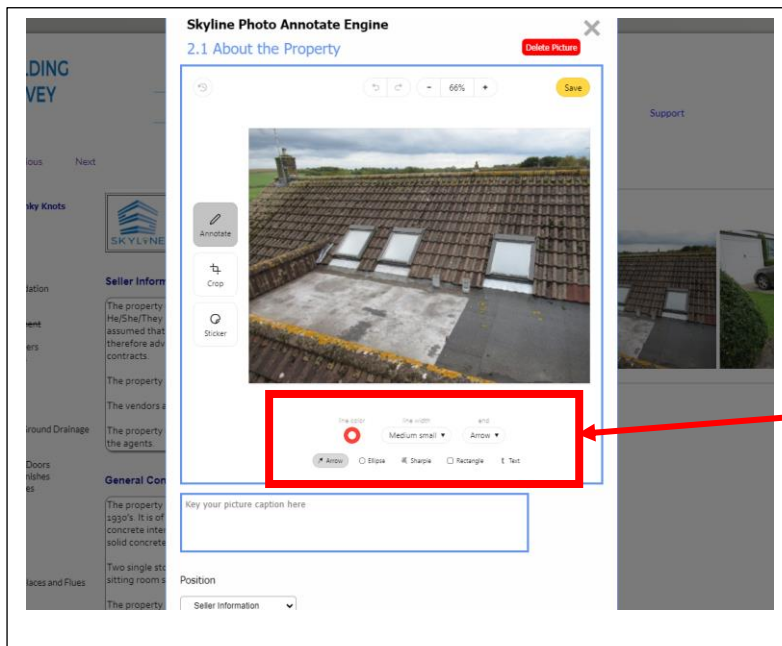
Drag image into box

In element double click image to open editor

Add caption, ellipse (circle), arrows etc and click Save

Drag pictures to reorder

## Photo editor



Select options for line colour, weight, and type (arrow, ellipse, sharpie, rectangle, text)

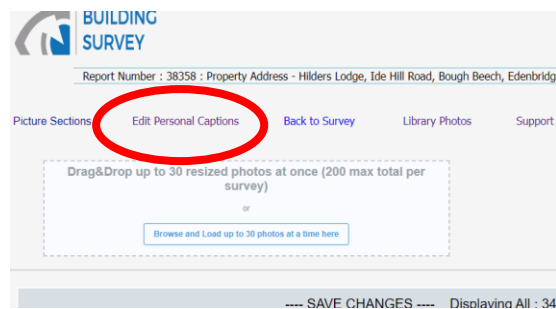
\* If you are using an iPhone/iPad that is saving your images in HEIC format then go to Settings  
General  
Camera  
Formats....and change to “Most Compatible”

## 5. Photo captions

Enter captions on photo page or using photo editor.

Each user has a library of personal captions that trigger predictive text.

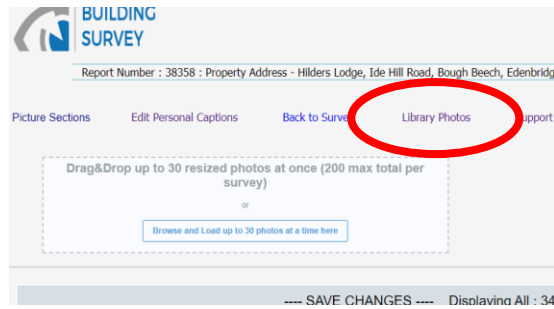
On Photo page go to **Edit Personal Captions** and set up/amend as required



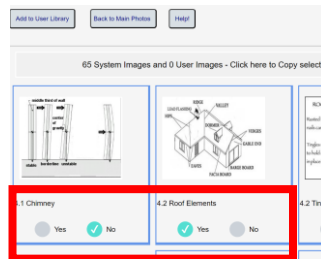
## 6. Library images

The library contains sketches and drawings to explain technical features in a simple and easily understood format

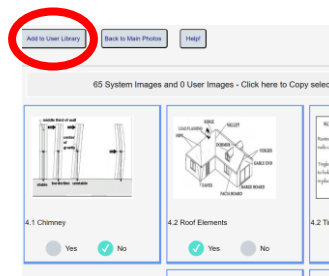
On Photo page go to Library Photos and select requires images.



Select desired images



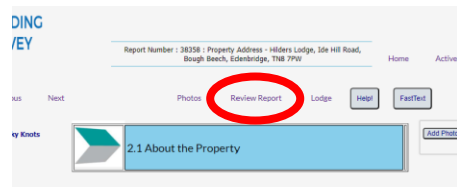
Add additional images to your personal library as desired



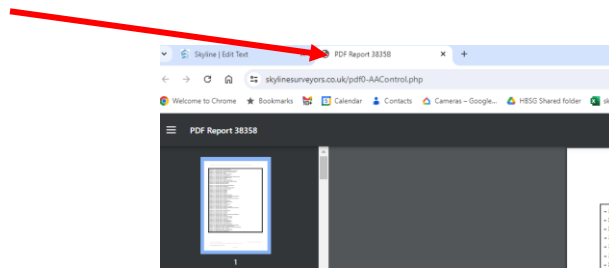
## 7. Report review

To see a draft copy of the finished report

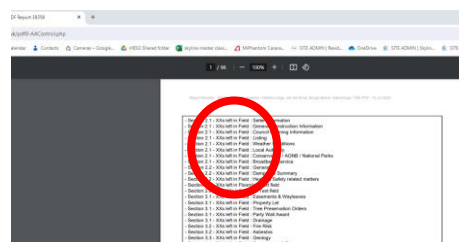
Go to Review Report



PDF of report will open in a new window on your screen. You can download and save if you wish, or drag to another screen and make amendments to live report.



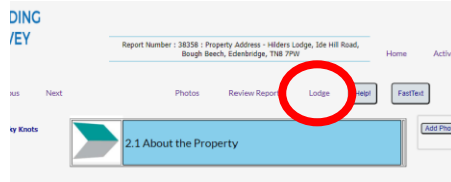
If you see a page of errors before the front page of the report these must be corrected before publishing the final report



When you're done reviewing click the "x" on the tab to close.

## 8. Lodge/restore reports

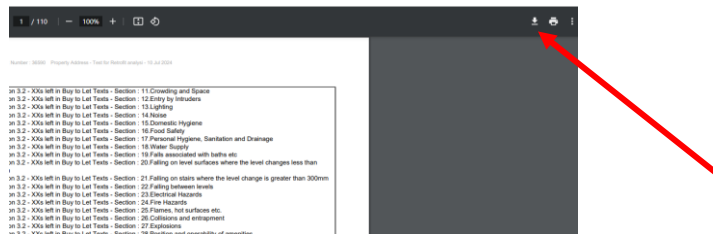
After reviewing the report and clearing errors, click Lodge



Click the purple Lodge button

Click the report icon to open report – first page should be the report details

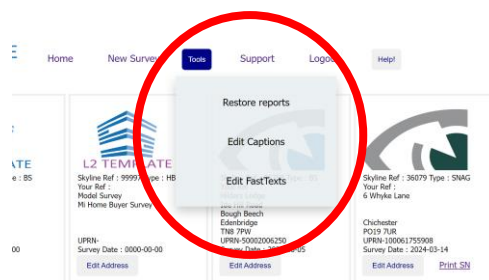
Click download button to save to your PC file system.



This report will now have disappeared from your Active Survey list

To reopen a lodged report for further editing

Go to Active Surveys/Tools/Restore reports





## 9. App

The Sky Survey app is available to facilitate gathering photos on-site

Log in to Skyline and on the home page click the link for App Store or Play Store

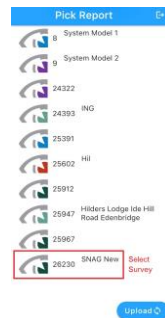
<https://apps.apple.com/gb/app/skyline-surveyors/id1613914170>

<https://play.google.com/store/apps/details?id=com.skylinesurveyors.skylineapp&hl=en-US&ah=QTnkR37N5-Mphm-GQU1lzPHdWKU>

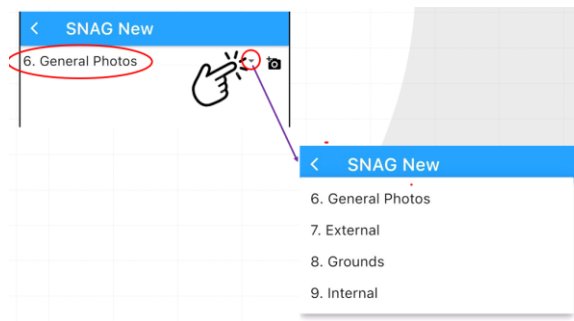
Set up report(s) on your desktop

Open the app with your usual Skyline login credentials

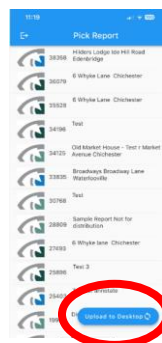
Open the relevant report



Take/pick photos and use drop downs to add captions and locate in report



When back at base (or in strong, consistent network coverage) click “Upload to Desktop” button to sync images.



## 10. Troubleshooting & FAQ

1. **Images won't upload properly** – check they are in JPEG/JPG format and not PNG etc. Reboot your system. Check your wifi connection.
2. **My report has disappeared from my Active Survey list** – go to Active Surveys/Tools/Restore reports – you probably lodged it accidentally. You can restore it from here.
3. **I've accidentally written my survey in my template** – click the “Support” button that you'll see at the top of every page and give us the address of the property and we can sort you out!
4. **I need to amend the contact details in the back of my reports** – Go to Main Menu/Edit Personal Details
5. **I need to change the address or date of my report** – Go to Active Surveys and locate the icon for the report that needs amending. Click Edit Address – note that some fields are not user-editable – for these please use the Support button and provide the information you require to be altered.
6. **I can't login to the system** – Firstly check your login details are correct (they are case sensitive). Next reboot your system. Check your wifi connection. If all else fails then email [info@skylinesurveyors.co.uk](mailto:info@skylinesurveyors.co.uk)
7. **How do I add a floorplan or other drawing/image** – simply save the image as a JPEG and upload it exactly as you would any other photo image. Then locate it in your report as required.
8. **How do I get a picture of the property on the front of the report** – On the main Menu go to Edit Personal Details and select the relevant radio button. The system will then put the first image in section 2.3 Elevations on the front of your report

## 11. Desk Study

Survey report formats include locations for a wide range of environmental and property specific general information, including the ability to include images clipped from non-copyright sites. Although these may be duplicating information provided by other professions, they help to enrich a survey report and can alert the surveyor to potential issues that a buyer may wish to be informed about.

You may not require all of these links on every property.

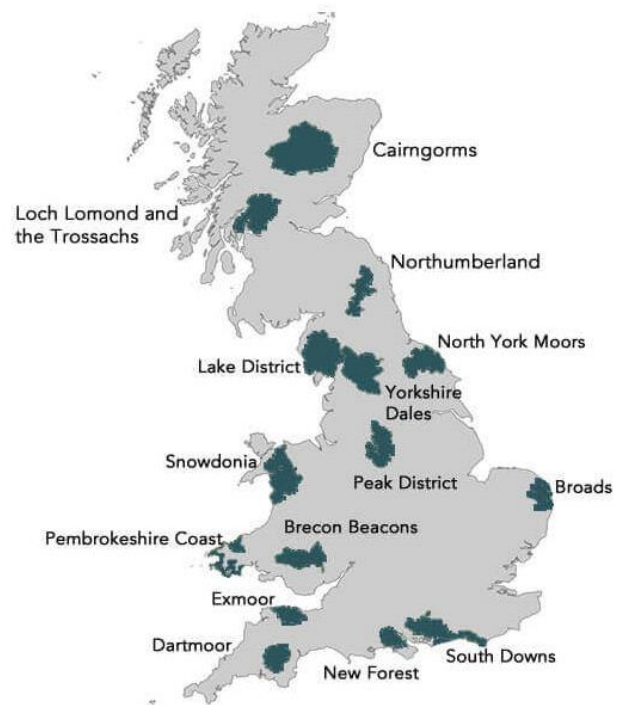
Images can be clipped using Windows Snipping Tool or by using the “screenshot” feature on an iPad.

Note that you should not rely on information obtained from these sites unless verified.

- i. EPC – available from the national database  
<https://www.gov.uk/find-energy-certificate>
- ii. Flooding – identify potential risks of flood from rivers and sea, surface water, groundwater etc. Open the flood risk map and clip an image with the property location identified.  
<https://www.gov.uk/check-long-term-flood-risk>
- iii Radon – identify higher than average risk areas  
<https://www.ukradon.org/information/ukmaps>
- iv Geology – identify the likely bedrock that could affect the stability of a property  
[https://geologyviewer.bgs.ac.uk/?\\_ga=2.146200948.1152776759.1720020101-1994128176.1720020100](https://geologyviewer.bgs.ac.uk/?_ga=2.146200948.1152776759.1720020101-1994128176.1720020100)
- v. Broadband and mobile signal  
<https://www.ofcom.org.uk/phones-and-broadband/coverage-and-speeds/ofcom-checker/>
- vi Oil & Gas Authority – identifying licences granted for oil and gas exploration, including fracking (where permitted)  
<https://nstaauthority.maps.arcgis.com/apps/webappviewer/index.html?id=29c31fa4b00248418e545d222e57ddaa>



- vii [FENSA – the online checker enables you to see what certificate are available, though payment would be required to access the certificates themselves. Simply enter the property postcode and house number](https://forms.fensa.org.uk/fensa-certificate)  
<https://forms.fensa.org.uk/fensa-certificate>
- viii [Old maps – Access to some maps available](https://maps.nls.uk/geo/find/marker/#zoom=5&lat=56.0000&lon=-4.0000&f=0&z=1&marker=56.0,-4.0&from=1450&to=2000)  
<https://maps.nls.uk/geo/find/marker/#zoom=5&lat=56.0000&lon=-4.0000&f=0&z=1&marker=56.0,-4.0&from=1450&to=2000>
- ix [Listed buildings – Use the Historic England checker](https://historicengland.org.uk/listing/the-list/)  
<https://historicengland.org.uk/listing/the-list/>
- x. [Coal Authority – mining risk](https://mapapps2.bgs.ac.uk/coalauthority/home.html)  
<https://mapapps2.bgs.ac.uk/coalauthority/home.html>
- xi. [National Parks planning information](#)  
[Brecon Beacons \(Bannau Brycheiniog\)](#)  
[Broads Authority](#)  
[Cairngorms](#)  
[Dartmoor](#)  
[Snowdonia \(Eryri\)](#)  
[Exmoor](#)  
[Lake District](#)  
[Loch Lomond & The Trossachs](#)  
[New Forest](#)  
[North York Moors](#)  
[Northumberland](#)  
[Peak District](#)  
[Pembrokeshire Coast](#)  
[South Downs](#)  
[Yorkshire Dales](#)
- xii [Get The Data – General area information](https://www.getthedata.com/)  
<https://www.getthedata.com/>





xiii **Historic Landfill**

<https://www.arcgis.com/apps/mapviewer/index.html?layers=23387a5a77514de59929dd67a97abd5a>

## 12. Guide to reducing photo image file sizes

In Windows

Download and install the Windows PowerToys app

<https://apps.microsoft.com/detail/xp89dcgq3k6vld?hl=en-us&gl=GB>

You do not need to “open” the app to use it.

Using Windows Explorer, locate the images you want to reduce – you can do multiple images in one go.

Highlight the images and right click on your mouse and on the drop down list that appears, select “Resize pictures”

In the image resizer window that opens, select size as Small

Tick box for “Ignore the orientation of pictures”.

Untick all other boxes.

Click Resize

In the same Explorer window where the pictures were located you will now see duplicates with a “(Small)” suffix.