

Admin user guide

Use this guide to set up your company, manage access and work with project records. Updated 30 September 2026.

Open capitanconsult.co.uk/app in your browser, or use the Capitan PM Android app with the same account. This guide follows the latest web screens. Installed Android versions may show earlier labels until updated.

Sign in and finish your profile

1. Use the email address on your invitation. Choose **Create account** if needed and use a password of at least 8 characters.
2. Follow the confirmation link in the newest Capitan PM email, then return and sign in. Check junk mail if the email is missing. If it supplies a code, select **Use an email code**, choose the matching **Email type** and enter the code.
3. If the company is missing, choose **Check for a company invitation**. Create a company only when setting up a new workspace.
4. Add your photo, name, job role, phone number and drawn signature. Choose **Save profile and continue**.

Find your way around

Area	What it contains
Company	Company resources and shared documents; administration for admins.
Projects	Project overview, forms, programme, RAMS, files and order numbers.
Calendar	Programme dates, approved leave and recorded illness.
Team	People, photos and positions; access and absence controls for admins.
Me	Your details, signature, documents, timesheets, leave and preferences.

Use the clock icon for attendance and the message icon for chat. On desktop, these open side panels. Main navigation moves to the bottom on smaller screens. Check the company and project name before entering records.

Date fields open a calendar picker. Select the month, year and day. Some older Android screens use the date format shown beside the field.

Set up your company and team

Company workspace and resources

1. For a new workspace, enter the company name, upload its logo and add at least one job role. Separate roles with commas, then choose **Create company workspace**.
2. Open **Company**. Use **Company details** for the name and logo, **Job roles** for positions, and **Assets & equipment** for vehicles, plant and equipment.
3. For an asset, enter its number or registration, name and type. Choose **Add asset**, then **Save company changes**. Use type **Vehicle** for assets that should appear in vehicle checks and waste transfer notes.

Choose available form templates

1. Open **Company > Form templates** and expand a category.
2. Select the forms your company uses, or enable a whole group. Choose **Save form templates**.
3. Include **Environment > Waste Transfer Note** and the RAMS acknowledgement form when your teams need them.

Invite and manage people

1. Open **Team** and choose **+ Add person**. Enter the name and exact email, then choose a job role.
2. Choose **Admin** or **Standard user**, set the person active and assign relevant projects. Enter their holiday allowance year and days if known.
3. Choose **Save team member**. A new active person receives an account invitation email. If delivery fails, check the email and use **Send account invitation** from their team record.

Access	Admin	Standard user
Projects	All company projects	Assigned open projects
Company and team	Manage permitted records	View permitted details
Project work	Forms, files, programme, RAMS	Same, in assigned projects
Reports and deletion	Admin controls	Not available

Use **Edit person** to change an eligible team record and suspended status to stop access. Your own profile is edited in **Me**; owner and self-editing controls are protected.

Create projects and clock in points

Create a project

1. Open **Projects > + New project**. Upload a clear project image and enter the project name and job number.
2. Enter the main **Postcode**. Street address and town are optional. Choose the status and assign the people who need access.
3. Choose **Save project**. The app looks up the postcode and sets the main clock-in location automatically.

A project image and postcode are required. Start date, finish date and overall completion come from the programme. Change the activities to update them.

Add more clock in postcodes

1. Open the project settings or **Edit site details**. Find **Additional clock-in points**.
2. Choose **+ Add clock-in postcode**, enter a different postcode and optionally name it, for example North entrance or Compound. Repeat for other parts of a large job.
3. Choose **Save project**. Each postcode is looked up automatically. Check the number of clock-in points in the project site details.

There is no manual pin or boundary confirmation step. Staff can clock in at any saved point. New postcode locations use a 150-metre area around the postcode position; a postcode represents a location, not the entire outline of a large site. Up to 50 points can be saved, including the main postcode.

If the postcode lookup fails, correct the postcode or connection and save again. For an older project without an active location, open its settings and save with a valid postcode.

Status and access

Project status is shown in the list and around the circular project image. Use the written status label as well as its colour. Admins can edit project details; standard users can view details and work on assigned open projects.

Closing a project hides it from standard users while keeping records available to admins. Permanent deletion and project export are under **Company > Administration > Project admin**.

Complete forms and waste transfer notes

Create and submit a form

1. Open the project, then **Forms > + New form**, or use the overview shortcut. Choose a category and template.
2. Complete the required fields marked with an asterisk. Use the date picker, select checks such as Pass, Fail or N/A, and add any requested rows, photographs or signatures.
3. Under **Sign and submit**, choose **Sign this form**, then **Submit form**. Editing an answer removes sign-off, so sign again after your final change.
4. Wait for confirmation and find the record in the Forms list. Use the status filters to find submitted forms, drafts or items needing action.

A form draft is saved on the same device and browser only. It is not a submitted company record. Reopen its draft row to continue. Additional named signers must draw their own signatures.

Use the Waste Transfer Note

1. Choose **Environment > Waste Transfer Note**. Enable it in Company templates first if needed.
2. Complete transfer details, waste description and code, quantity, containment, current holder, receiving party, carrier, destination and the requested authorisation details.
3. For **Vehicle source**, choose **Company vehicle asset** and select the vehicle. Its registration and description fill in; check the registration is the actual number plate. For an external or hired vehicle, enter its details directly.
4. Complete the declarations and both named party signatures, then apply your form sign-off and submit. Add ticket references or supporting photos where useful.

This template is for a single transfer of non-hazardous waste in England or Wales. It does not replace the separate hazardous-waste consignment process.

Download a record

Open the form and choose **Download form PDF**. For several records, use **Select & download**, select the records and choose **Download selected**. Each form starts on a new page. Read action messages beside the controls if a save or submission fails.

Files drawings and documents

Upload project files

1. Open the project **Files** tab and choose **Documents**, **Drawings** or **Photos**. The overview also has shortcuts.
2. Choose files, or use **Take photo** where offered. Check pending items and any caption or folder details.
3. Choose **Upload**, wait for completion and open the uploaded file to check it is readable.

Save and download drawing markups

1. Open a drawing. Use the page controls for a multi-page PDF.
2. Choose **Pen**, **Line**, **Box** or **Text**, then select colour and line size. For text, enter the wording and place it on the drawing.
3. Check placement and choose **Save markups** before leaving.
4. Choose **Download marked-up PDF** for the annotated copy. **Open original** opens the unmarked source.

Location	Who manages it
Project files	People with access to that project.
Company documents	Admins add and manage; company users view.
My documents	Your own personal documents within this company.

Use folders

In **Company > Company documents** or **Me > My documents**, choose **New folder**, enter a name and choose **Create folder**. Open the folder before uploading. Use **Move** to relocate an item and **Back to parent folder** to move up.

Company and personal document uploads support PDF, DOCX, XLSX, CSV, TXT and images, up to 20 MB each. Keep shared policies in Company documents.

Keep lasting project records in Files. Chat messages and attachments expire after three days. Saving drawing markups and downloading the marked-up PDF are separate actions.

Programme calendar and order numbers

Add or update a programme activity

1. Open the project **Programme** tab and choose **+ Add activity**.
2. Enter the activity name and choose its start and finish dates from the calendar pickers. Set its completion percentage with the slider.
3. Choose **Add activity**. To change an existing activity, open its card, edit it and choose **Save activity**.
4. Use **Download programme PDF** for a copy. Company and project images appear with the programme.

The latest web screen saves each activity directly. If your Android version shows **Apply activity** and **Save programme**, use both in that order. Durations include calendar days: a three-day activity beginning Monday finishes Wednesday.

Project start, finish and overall completion follow the saved programme. Both admins and standard users with project access can update activities; agree changes with the project team.

Check the calendar

Open **Calendar**, choose the relevant date and open a scheduled project to see its programme. Approved leave and recorded illness also appear. A project needs saved programme activities before it appears as a scheduled project.

Generate an order number

1. Open the project overview and choose **Order numbers** under project files and records.
2. Complete **Supplier** and **Order details**. Both are mandatory. Choose **Generate order number**.
3. Copy or share the number exactly as displayed. The reference uses your initials, the job number and a running sequence.
4. Use the project register to find an existing order. If a request is pending, choose **Retry generating order number** to recover that request rather than creating a duplicate.

Generating an order number records the reference and details. It does not place or send an order to the supplier.

Admins can expand **Order number report**, filter by project, date or search text, then choose **View order report** or **Download order report CSV**.

Build and complete RAMS

RAMS brings method statements, risk assessments and COSHH assessments into one project pack. Open **RAMS** between Programme and Files. Admins and assigned users can build packs.

Set the project arrangements

1. Choose **+ New RAMS**. The title includes the job number, project name and postcode; company and project images appear at the top. A unique reference is allocated on the first save.
2. Choose **Site contact** from the people assigned to this job. Set planned dates and fill the site arrangements, including access, welfare, first aid, fire arrangements, assembly point, local hospital and hospital address.

Choose content and edit it

1. Choose **+ Choose templates**. Switch between Method statements, Risk assessments and COSHH assessments. Search and tick several items, including across categories, then choose **Add all**.
2. For your own content, select its category and choose **+ Write your own**. Enter a title and the details.
3. Open **Edit** on each chosen item to expand its fields. Edit wording, move items up or down or remove them. The scope of work is populated from the selected method titles.

Risk templates include initial and residual likelihood and severity scores. These use the displayed 5 by 5 matrix. You can change the numbers. COSHH templates contain editable product scope, hazards, controls, PPE, first aid, monitoring and references; they have no danger-rating selector. Product and site details should describe the work being carried out.

Save complete and download

1. Choose **Save draft** to retain a shared working version, or **Complete RAMS** when finished. The person completing it is recorded as **Reviewed by**; there is no separate manager approval step.
2. Save changes before using **Download saved PDF**. The landscape PDF separates site arrangements, methods, risks and COSHH by colour, with the risk matrix before the assessments.
3. Use **Revision history** to open earlier saved versions. Previous revisions are read-only; save new changes to the current pack.

Signatures remain in a separate briefing sheet form. A completed, saved RAMS offers **Open RAMS acknowledgement form**. Record its reference and revision in the briefing record. The RAMS PDF must be accompanied by that briefing sheet.

For an existing pack with previously empty template fields, reopen the current pack, save it and download again to include the new default text. Existing written edits are retained.

Clock in and manage leave

Record your shift

1. Open the clock icon or **Me > Clock in to a project**. Choose the project and allow device/browser location access. Be at one of its saved clock-in postcodes.
2. Add a **Clock-in note** if useful, choose **Clock in** and wait for the active-shift confirmation.
3. At the end of the shift, add an optional **Clock-out note** and choose **Clock out**. Check that the shift has ended.
4. Open **Me > My timesheets**, or the clock panel **History** tab, choose the date range and select **Load timesheets**.

Location is checked when you press clock in or out; the app does not continuously track your movement. An outside-site clock-out is recorded for admin review. If offered **Clock out without location**, enter an accurate reason. Ask an admin to correct missed or incorrect times.

Request time off or record illness

1. Open **Me** and check the **Holiday allowance** bar. Choose + **Request time off**.
2. Choose holiday, unpaid leave or illness, then pick the first and last dates. Check **Working days off**; the suggested count is Monday to Friday, so adjust for your work pattern, bank holidays or half days.
3. Choose **Submit leave request** for holiday or unpaid leave. Illness uses **Record illness** and is recorded immediately.
4. Use **View leave & absence history** to check the result. A standard user can withdraw an eligible pending request; approved leave or recorded illness needs an admin correction.

Pending holiday requests reserve allowance. Unpaid leave and illness do not reduce it. Holiday and unpaid leave require admin approval; approved entries appear in the calendar. Medical details are not required for the illness record.

Admin attendance and leave controls

In the clock panel, **Clocked in now** shows current shifts. Under **History**, load the dates and choose **Download timesheet CSV**. Open shifts are excluded from hour totals; breaks and overtime are not calculated.

Use the entry edit control to correct times and provide a **Correction reason**. In **Team**, approve or decline **Leave requests**; open a person to view absence history or **Set holiday allowance**, then **Save allowance**.

Chat profile and reminders

Send a message or attachment

1. Open the message icon. On a new device, choose **Enable chat**. Recipients must also enable chat.
2. Choose **New message**, select a colleague and type your message. Use **Attach file** for an attachment up to 5 MB.
3. Choose **Send message**. The icon shows an unread count; open a conversation to read messages.

Only admins create groups. Use **New message > Create a group**, enter a name, select participants and choose **Create group**.

Messages and attachments are end-to-end encrypted and expire 72 hours after sending, even if unread. Copies, downloads and screenshots kept outside the app are not erased. Save lasting records in the project files.

New devices receive new messages, not older history. If participant device codes change, check with that person by phone or in person before accepting the new codes. Group names, participants and delivery times are service metadata, rather than encrypted message text.

Update your details

Open **Me > Personal details** to update your photo, name, role, phone number and signature, then choose **Save profile**. In older Android layouts, use the separate **Your signature** section. Use **My documents** for your own records.

Set your own reminders

1. Open **Me > Preferences > My reminders > + Add reminder**.
2. Choose the reminder type, enter its message and 24-hour time, then select the repeat days. Leave it enabled and choose **Save reminder**.
3. Allow notifications and use **Test reminder**. Use Edit, On/Off or Delete to change the schedule.

Reminders are stored for this account and company on this device. They pause when you sign out or switch company. Browser reminders appear while the page is open and visible. Phone notification or battery settings can affect delivery.

Save feedback includes a visible message and, when enabled and allowed by device settings, a ping. Always use the on-screen confirmation to check that the action succeeded.

Reports exports and help

Find and export project records

Open **Company > Administration > Reports** and choose a project, or open its Reports section. Filter by form type, asset or date. Use **Download selected** or **Create report from matching forms** for the required records.

Close export or delete a project

Use **Company > Administration > Project admin** and choose the project. **Download all project data** creates a ZIP containing project records, uploads, programme, order numbers and RAMS revisions. Check the archive and any warnings. Download attendance reports separately.

Use status **Closed** to retain records for admins while hiding the project from standard users. For permanent removal, use **Delete project** and the final confirmation. This cannot be undone. If interrupted, use the displayed retry action.

To erase a whole workspace, use **Delete company**, read the scope and enter the exact company name and current password before final confirmation. Export needed records first. Sign-in accounts and exported copies are not erased.

Quick troubleshooting

Problem	Check
Company or project missing	Use the invited email; check the invitation, active membership and project assignment. Closed projects are hidden from standard users.
Clock in unavailable	Allow location access, be at a saved postcode point and check GPS accuracy. An admin can save the project postcode or add another point.
Cannot submit or save	Read the nearby message, complete required fields and sign again after form edits. Check the connection and reopen before duplicating a record.
RAMS PDF unavailable	Save the current changes first. Download saved PDF is disabled while unsaved edits remain.
Missing drawing annotations	Use Save markups and Download marked-up PDF. Open original does not contain the annotations.
Email or password problem	Use Forgot password when needed and the newest email link. Report the exact error without sharing passwords, codes or full sign-in links.

For help, record the screen name, approximate time and exact message. Share a screenshot with sensitive details covered.