

InspectNOW PocketPC User's Guide

InspectNOW



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Introduction

This guide was created to help InspectNOW PocketPC users create an inspection and capture critical inspection data in a fast and efficient manner. The primary function of InspectNOW PocketPC is to make data collection and report generation easy for the professional inspector. Using this advanced technology not only frees up the inspector to spend more time examining the critical systems of the home, it's sure to impress the clients.

This guide explains the various features, functions and benefits of InspectNOW PocketPC. It also walks you through creating an inspection and gathering the inspection data one step at a time.

The pages that follow include a table of contents, step-by-step instructions on how to use the InspectNOW PocketPC system, and a definition of common terms for your convenience.

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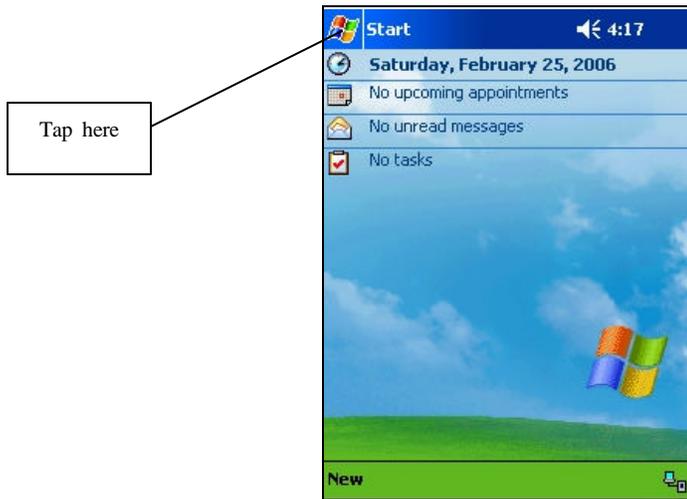
Setting Up Your PocketPC

This guide assumes that you have already loaded InspectNOW PocketPC on your handheld device. See Software Installation instructions for directions.

Inspection Walk-through

Setting up a new inspection in a PocketPC

To Launch InspectNOW, turn on your PocketPC. From the Desktop, single-tap the window icon to the left of **Start** at the top of your screen. This will open a menu, pick **Programs**, pick **InspectNOW** from the list of programs. (Note: you can set your PocketPC to show InspectNOW automatically in the Start menu through the Settings options)



Unlike traditional PC's, PocketPC menus appear at the bottom of the screen. To create a new inspection document select **File**, select **New** and 1 of 2 blank Inspection Setup screens will appear. Use the pen or keyboard to enter general information about the inspection such as Dwelling Address, Realtor, Agency, Client Name, etc. (Note – to enter data into a specific field, tap once on the field to place the cursor in that field, then type or write the information you wish to store in that field)



Notice that some fields have a button with a black triangle at the far right. This triangle indicates a popup list (also referred to as pick lists) associated with the field for quick entry of common data. You can add your own items to these pick lists. To maintain a pick list, tap the triangle to bring up the list, then tap **Edit List**.

A dialog will appear showing the items currently in the pick list. Use the buttons in this dialog to add new items or to delete or edit existing items. To add an item, simply tap the **Add** button, enter the text for the new item and click **OK** to see the new item in the list. Click **OK** once more to return to the Inspection Setup screen.

Now you can tap the triangle to bring up the list with the new item in it. Tap on the item you want and it automatically goes into the field. (Note – if you bring up a pick list and do not want to choose any of the items, simply tap away from the list to make it disappear.)

The most important item to complete on the Inspection Setup Screen is the **Document Type** field. Other fields may be left blank but you **must** pick a Document Type from the pick list so that InspectNOW knows which category, step, and comment templates to use for the inspection. InspectNOW comes with two basic templates 1) Matrix Deluxe and 2) Property Inspection. It initially defaults to the Matrix Deluxe template.

Complete the remaining fields. **Doc #** can contain both letters and numbers and should be unique. If you have created an inspection record in InspectNOW Office you should use the exact same Doc #. The document number appears in the upper right corner of each report page, it serves as the unique identifier from one printed report to the next. Examples of unique document numbers are a combination of client name and date (Client Bill Smith inspection on 2/15/07 Doc # SM21507) or date and inspection number (Second inspection performed on Feb 15, 2007 Doc # 21507-2). Pick a numbering convention that assists you in filing and tracking of reports.

Inspection Data Overview

To enter the actual inspection data, you first must view a list of categories available for the current inspection. To do this, tap the **View** menu and select **Category List**.

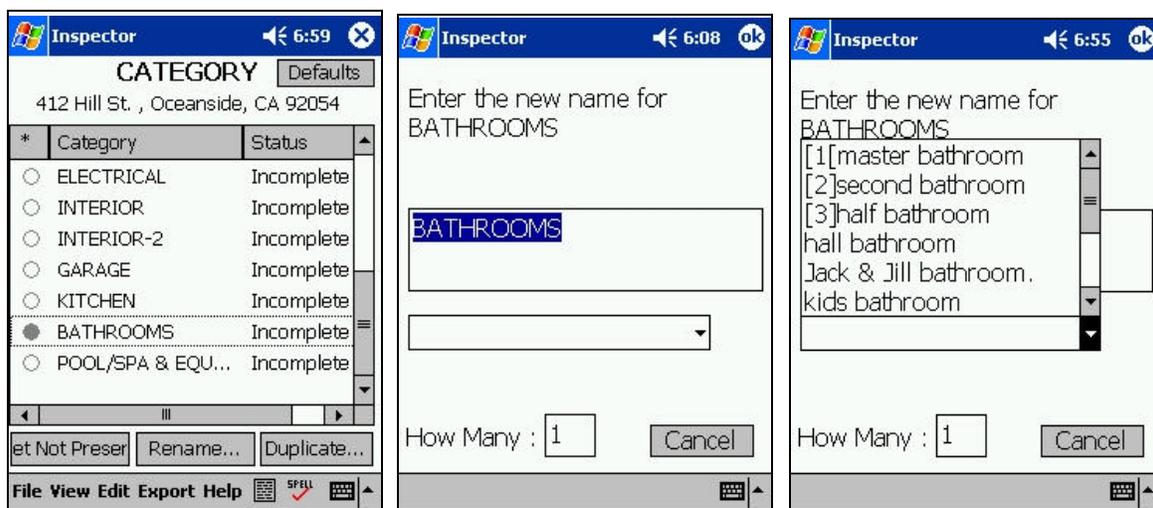


Notice how the Category List has two columns. The first column displays the category name. The second column shows the status of the category. By default, all categories in a new inspection have a status of "Incomplete". When a rating has been entered for each step within a category, the status field for that category will change to "Complete".

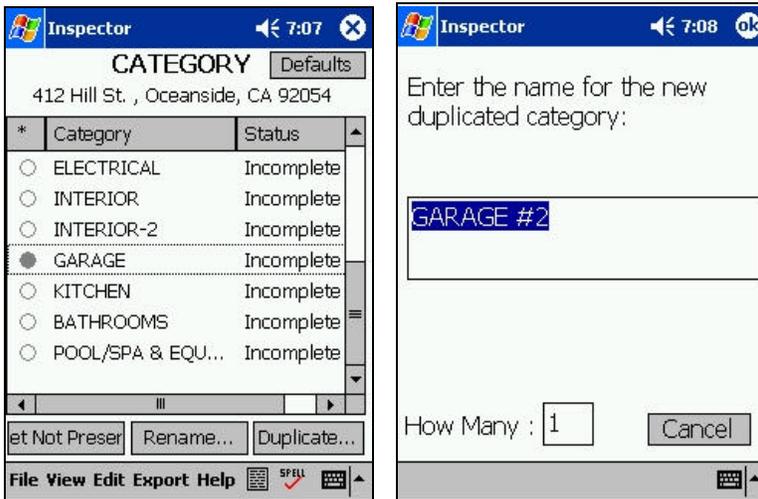
There are 3 buttons on the bottom of the Category window see above.

Not Present – The "Not Present" button is used when you want to flag a Category as not being present on this inspection. You select the Category by tapping on it's associated radio button (small circle to left of category name) and after it is highlighted you tap the "Not Present" button and the status of the Category changes from "Incomplete" to "Not Present". This is not recommended if you are printing the Matrix Deluxe style report.

Renaming a category on the fly – The second button, the "Rename..." button, lets you change the name of any selected Category for the current inspection. This is only for the current inspection and does not change the template data in any way. All the original Category's Steps, Materials, Ratings, and Step Info stay intact. The only thing different is the actual name of the Category. A good example would be to have a "Bathroom" Category you can rename to "Master Bathroom" or "1st Floor Bathroom". First tap on the circle to the left of Category you want to rename causing the circle to darken. Next tap the Rename button. Tap the black triangle and pick from the options provided or use the keyboard or transcriber to insert a new name.



Duplicating a category on the fly – InspectNOW has a powerful feature that allows you to duplicate a Category on the fly. In other words, if you are inspecting a property that has a second Garage, you can use the Garage Category as a template to create a second Garage Category with all of the same Steps, and Comments from which to choose. The Step numbers are the same except an additional number is appended to the end of each Step number. As an example the Step "62 Vehicle Door" in the original "Garage" Category would be "62.2. Vehicle Door" in the newly duplicated "Garage" Category. The process is the same as renaming described above. First tap the circle to the left of the category name you want to duplicate, then click **Duplicate**.



You can also change the number of duplicates you want created by changing the value in the "How Many:" field which defaults to one. The name of the new Category does not have to stay as the default (like "Garage #2") but can be changed to anything you feel is appropriate.

Step List Window

Single-tap a category to view its corresponding step list window. In the example below single-tap **Grounds** and the step list window for **Grounds** appears. Double-tap **Sidewalks** and the **Sidewalks** step detail window appears.



Category Window

Step List Window

Step Detail Window

The Step List window has a list of all the Steps/Components for the Category you chose. The window consists of 2 columns of data:

Step Name – a list of the steps or components that make up the Category. In the case above, Driveway, Sidewalks, Retaining Walls, Patio, Patio Cover, Decks/Porch and Fence & Gates are the components of the Grounds Category. As such each of these components will appear on the Grounds page of the inspection report.

Rating – the rating (Appears Serviceable, Repairs Recommended, Safety Hazard or N/A – not applicable) can be chosen for each step by clicking on the black triangle and picking from the corresponding pick list. Ratings can also be chosen one step down at the Step Detail Window.

The Step List window has three unique buttons across the bottom.

To Categories – selecting this button will return you to the list of Categories for your current inspection. You can do your inspection in any order you want and jump between Categories by returning to the Category List and selecting another Category. This makes data collection easy as you encounter the different systems of the home during the logical path of the inspection.

Duplicate ... – this feature is similar to duplication of a Category explained above. This is very useful when the property has multiple components. Example – Fireplace(s) are located in the Interior-2 tab. If the home has more than one fireplace, simply duplicate the fireplace step and identify the applicable location. This new Step is inserted right after the original Step in the list. When this Step is duplicated the new Step will add a letter to its Step number so it would become "52a.Fireplace" and it will have the same rating choices, materials and comments available to it as the original Step. You can also rename this new Step to whatever you want when duplicating it. Again, just like duplicating a Category this new Step is only for the current inspection and does not change your Template Data.

Defaults– In order to make the rating process efficient when few defects are observed for a given category, InspectNOW has an advanced feature that allows you to apply rating and material defaults. The standard Matrix Deluxe and Property Inspection templates do not have any preset defaults. You can set the default rating and default materials to be applied for any given step through Template Maker. (Refer to the Template Maker User's Guide for details.) Once defaults are identified in Template Maker and the data file copied to the PocketPC, just tap the "Apply Defaults" button and all of the unrated steps will receive a default rating and any default materials will get checked. Any Step that has a Rating that has no default rating choice will remain blank. It's important to remember to change a pick of the default setting is not appropriate for the specific property inspection. Using defaults properly can save the user data entry time, however this is generally considered a function for advanced users.

The Step Detail Window is where the bulk of the inspection data is placed into the data file. This screen contains four tabs, the rating pick list window, “forward/backward” buttons and the multi-picker button.

Rating – the inspector uses a drop down or pick list to choose the appropriate rating from the rating window. Ratings options include:

- Appears Serviceable (defined in the inspection key)
- Repairs Recommended
- Safety Hazard
- Not Applicable

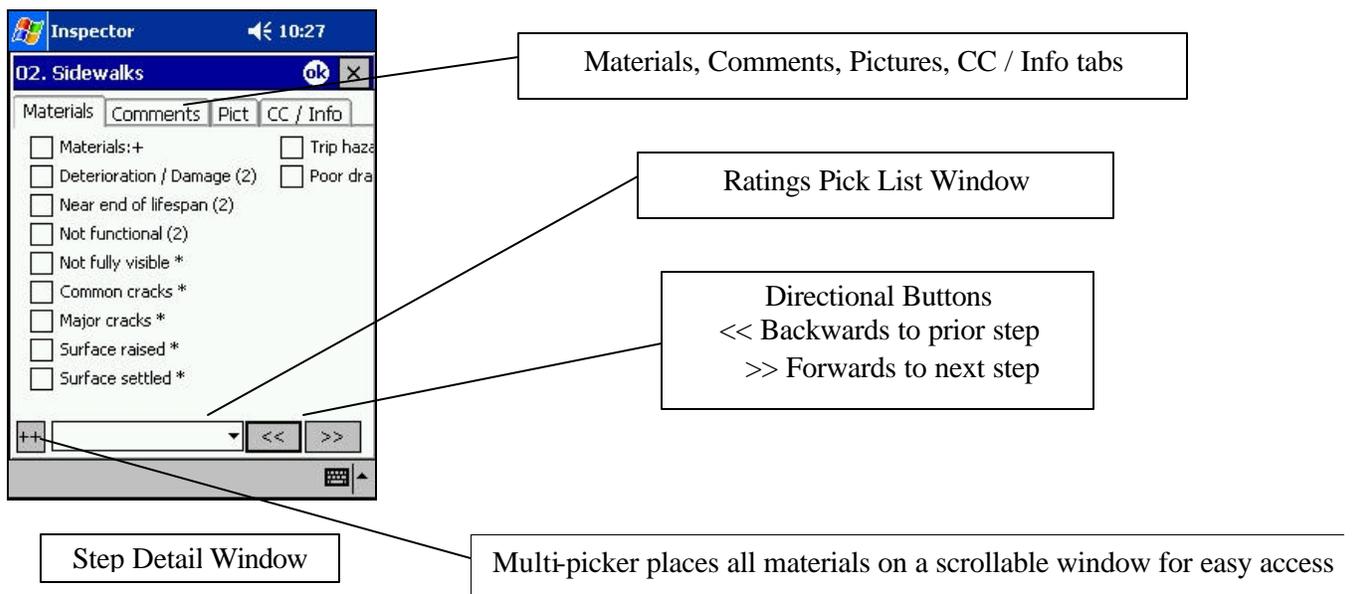
Material – materials appear as a series of check boxes that identify a variety of items such as:

- Type of building material such as Stucco
- Location such as Patio
- Common Conditions such as Major Cracks, Exposed Wiring, etc.

Comments – used to provide additional comments about the condition of the step. Comments can be picked from a categorized comment library (pick list) for placement in the inspection report or they can be input on at the time of inspection. Comments input at the time of inspection can be added to the comment library for future use or used in that specific report only. This section of the report expands to accommodate the amount of comments, there are no space limitations.

Pictures – pictures can be added to the report. InspectNOW’s unique picture management program tags the picture for easy reference.

CC / Info – Code Check 4th edition references are built into InspectNOW. This makes it easy to look up critical references during the inspection. In addition to the preloaded references the inspector can add additional reference materials for easy access. Now you can have a reference library in your hand throughout the inspection.

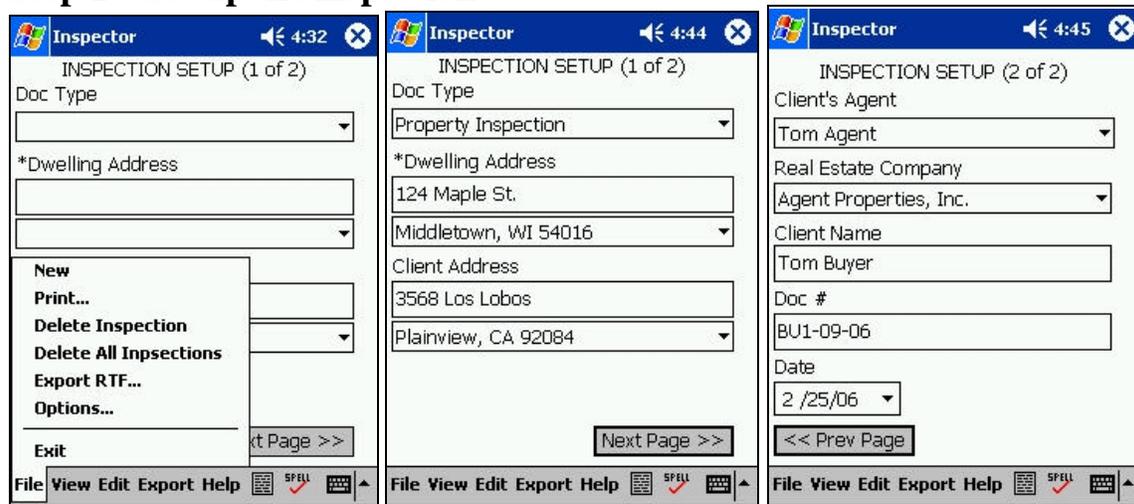


Entering Inspection Data

The process of entering inspection data is organized by category. For every category there are a number of steps and for each step there is a step detail window where the bulk of the inspection data is entered. The Matrix Deluxe and Property Inspection templates that come with InspectNOW have established Categories, Steps, Material / Conditions, a robust Comment Library and Code Check® 4th editions references where applicable. Additional references can be added by using Template Maker (see Template Maker User's Guide for more information).

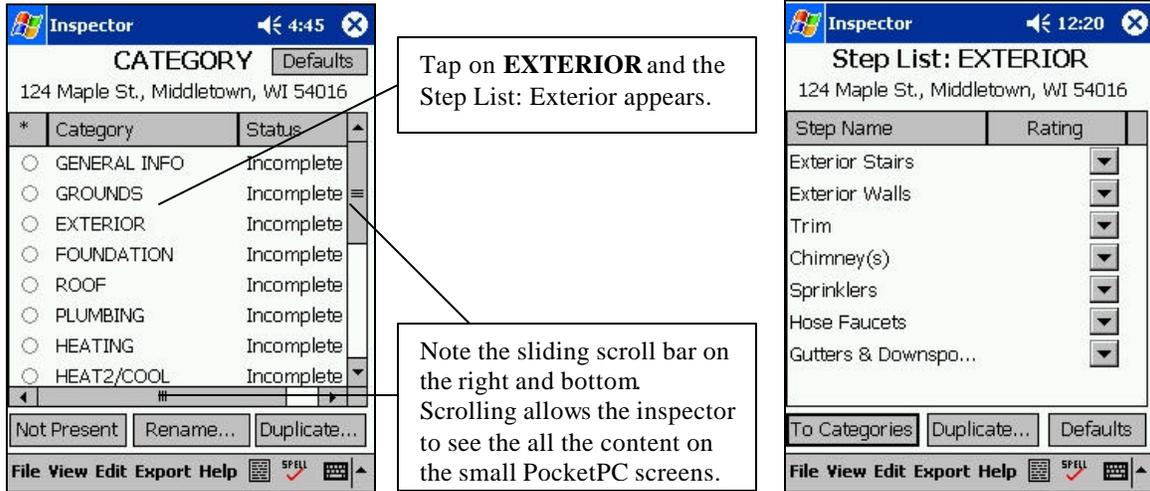
Below is an example of the processes used to enter data and produce an inspection report. This example will focus on the Exterior category, Exterior Walls step. The inspector can repeat these basic processes for the various categories and steps throughout the inspection. Data collection is quick and easy.

Step 1 – Set up the inspection



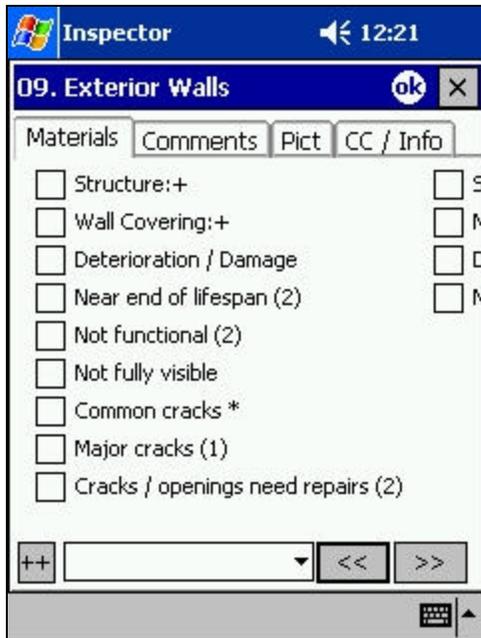
After opening InspectNOW, tap on **File** then tap on **New**, then complete the Inspection Setup screens 1 and 2. It is critical that the Document Type is picked using the **Doc Type** pick list. Complete the remaining fields. **Doc #** can contain both letters and numbers and should be unique. If you have created an inspection record in InspectNOW Office you should use the exact same Doc #. The document number appears in the upper right corner of each report page, it serves as the unique identifier from one printed report to the next. Examples of unique document numbers are a combination of client name and date (Client Bill Smith inspection on 2/15/07 Doc # SM21507) or date and inspection number (Second inspection performed on Feb 15, 2007 Doc # 21507-2). Pick a numbering convention that assists you in filing and tracking of reports.

Step 2 – View Categories, tap on GROUNDS



Note: The inspector can pick a rating for each of the steps from the step list window. This is especially helpful if there are steps that are not applicable for the property. Example, if the home is slab-on-grade construction with no exterior stairs, simply tap on the black triangle under Rating across from **Exterior Stairs**, the standard rating pick list would appear and tap on **N/A** for not applicable. Double-tap on **Exterior Walls** to start entering data.

Step 3 – Double-tap Exterior Walls and Start Entering Data

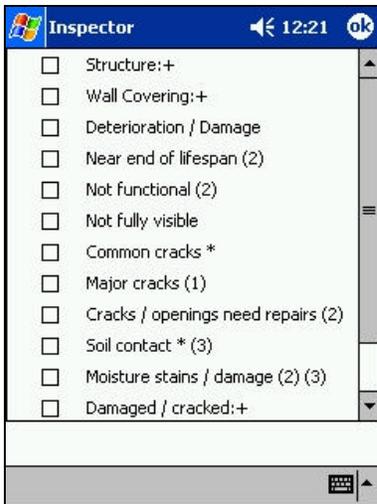


After double-tapping on **Exterior Walls** the Exterior Wall Step Detail window will appear.

Note the four tabs across the top. Generally it is best to start on **Materials** and then add comments. More information on the **Pict** and **CC / Info** tabs to follow.

Note the + sign after **Structure** and **Wall Covering**. The + sign indicates that a pick list will automatically appear after selecting one of these material items.

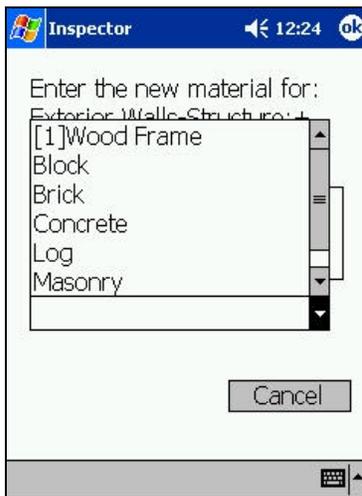
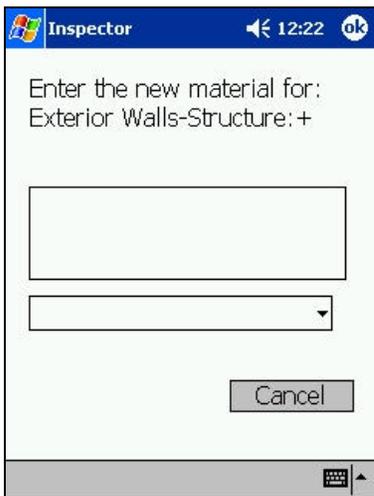
In this case not all the materials are visible on the small handheld screen. To see all materials at once tap on the multi-picker button **++** this will bring up another screen (see below) with all the materials visible.



Multi-picker window - tap on the items to include in the report.

Always tap on items with a + sign. The + sign indicates items required by most professional standards of practice. Click **OK** when finished.

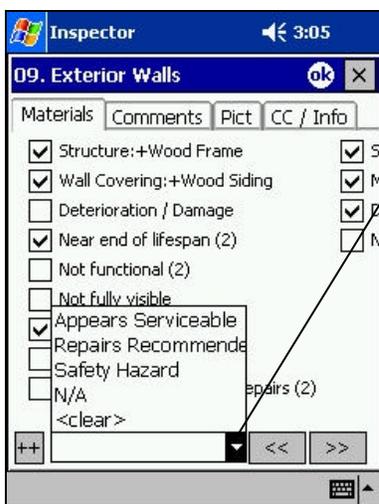
Tapping the items also determines their order on the report. Each of these items will appear as checkbox with the applicable text on the report.



After tapping **OK** a series of windows corresponding to the items with the + sign will open.

The user can tap on the pick list window (black triangle) and a list of options will appear or type/write in the information. The options in the pick lists can be modified in Template Maker. Click **OK** when complete.

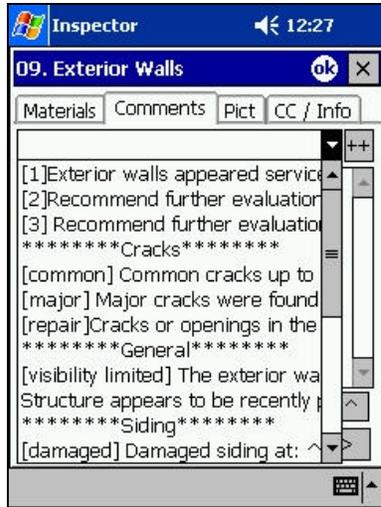
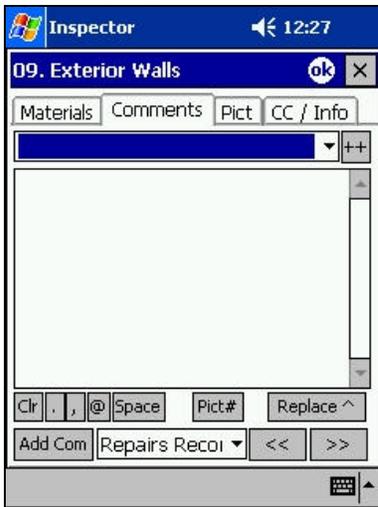
The **Cancel** button is also available if the material step was picked in error.



Next tap the **Ratings** drop down box and choose the appropriate rating from the window. Each step must be rated for the **Category** to be complete.

Next tap on the **Comments** tab.

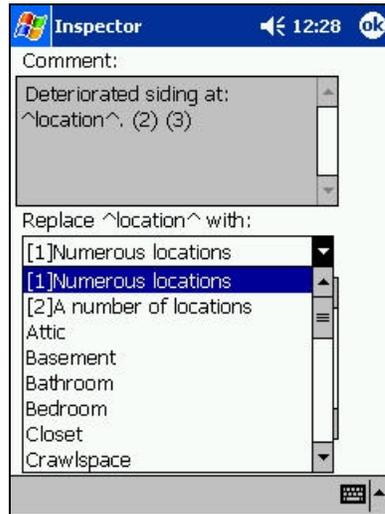
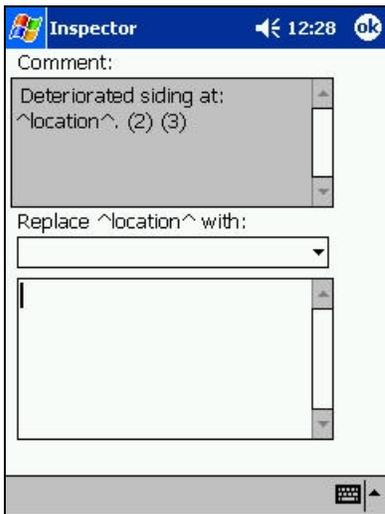
Comments serve to further elaborate on conditions noted in the materials check boxes or to comment on conditions not available in the materials check boxes.



Comments can be added using the pick list or by writing/typing them in.

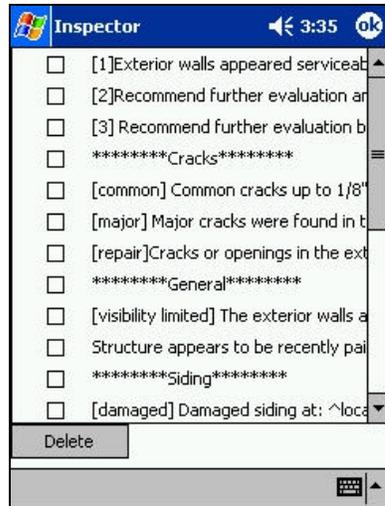
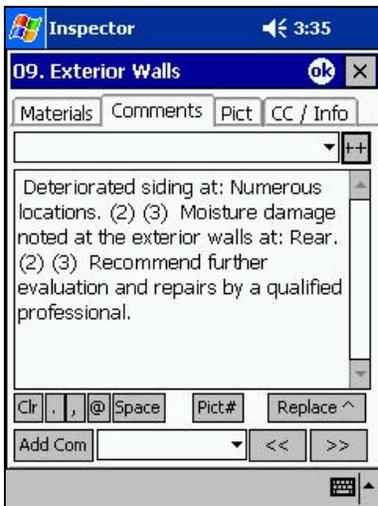
Comments are organized by headings (Cracks, General, etc.). Many comments have label located in brackets [] to assist in their identification. The comment library can be easily edited in Template Maker.

Tapping on a comment adds it to the report. Multiple comments can be added in series.



Some comments have embedded pick list as indicated with caret (“^”).

After picking the initial comment a second pick list window will open prompting the user to pick from a series of options to complete the sentence. If the desired option is not in the pick list, type or write in the correct information. Pick lists can be modified in Template Maker



Multiple comments can be chosen, compiling one after the other. Space is automatically added between sentences.

There is also a multi-picker button on the comments tab. When using the multi-picker, comments can be picked in any order and will compile in the order indicated.

See additional information regarding comments at the end of the guide.

Step 4 – Complete All Categories and Steps

After completing the current step move to the next data entry point. This can be done one of two ways:

1. Tap “OK” at upper right. This will take the program back to the Step List for the respective category. In this example tapping “OK” will take the user back to Step List Exterior. From this screen the inspector can tap and complete a different step within the Exterior section of the report, or tap on the “To Categories” button in the bottom left of the screen to view a list of Categories to pick the next data entry category.

2. Tap the forward arrows  at the bottom right to advance to the next Exterior Step, in this example the program would advance to Trim. Tapping the forward or reverse arrows at the bottom of the screen will advance through the steps in a given category but will not advance the program to the next category.

Continue to move through the Categories and Steps as you complete the inspection. In the real world of inspecting, the various systems and components do not necessarily present themselves for inspection in the same order as they are included in the program. However this is not a problem as it is easy to move between Categories and Steps by quickly tapping the appropriate button. Learning where each step is located, Electrical Wiring, Plumbing Waste Lines, Furnace Venting, etc. is critical to easily maneuvering throughout the program.

Creating an Inspection Report

Export the Data File to InspectNOW Office to create the report

In order to print the ITA Matrix Deluxe report it is necessary to transfer the inspection data collected with InspectNOW PocketPC to the InspectNOW Office software. Transferring from InspectNOW PocketPC is done in three basic steps:

- 1) The inspection must be exported from the InspectNOW PocketPC or InspectNOW PC software;
- 2) The exported inspection must be copied to the “Import/Export” folder on the PC running InspectNOW Office;
- 3) The inspection must be imported from the “Import/Export” folder into the InspectNOW Office application.

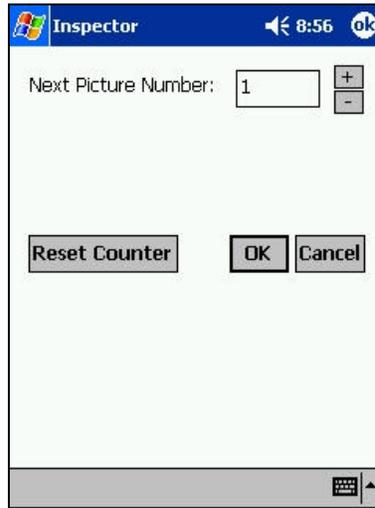
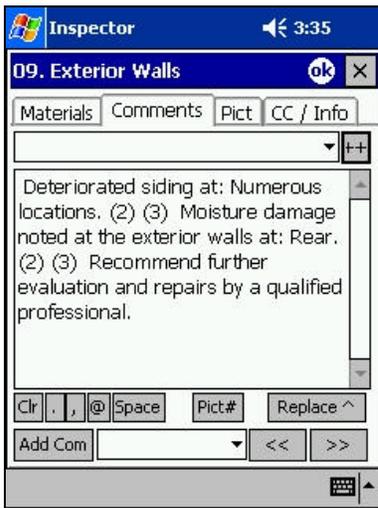
See the InspectNOW Office User’s Guide for detailed information on exporting inspection data and creating a Matrix Deluxe inspection report.

Additional Features

Adding Pictures to the Report

There are two ways to add pictures to an inspection and the method to be used is dependent on how the pictures are taken. The most common method is to take pictures with a separate digital camera (one not integrated in the PocketPC). The second is for users that have a camera built into their PocketPC device. Both methods are explained below.

Separate PocketPC and Camera

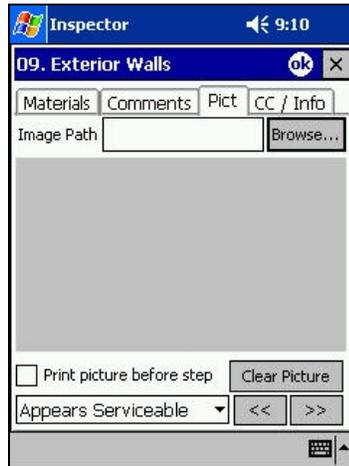
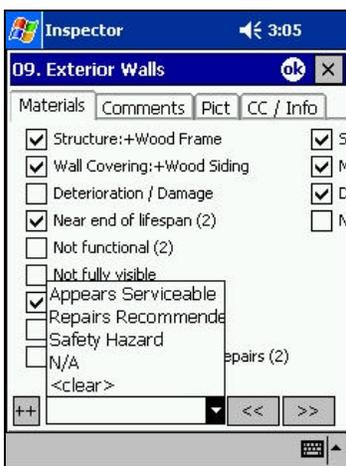


In the Comment window, tap on the **Pict #** button on the bottom of the screen to bring up the picture window. Use the + and – buttons to match the picture number with the correct number in your digital camera.

Once you’ve identified the correct number, tap OK. If you change your mind and don’t want to reference a picture tap Cancel. Tapping Reset brings the counter back to 1.

Digital cameras number each picture. It is easiest to start each inspection day with either no pictures stored in the current folder on the camera or to know what picture number you are starting on. See your camera user’s guide for more information. Care should be taken when selecting picture quality on your camera. Many digital cameras take pictures at 4 or more megapixels. High resolution means large data files which can quickly fill up your computer memory and slow down your programs. For reporting purposes pictures in the 1 to 2 megapixels work best.

Integrated PocketPC and Camera



If our PocketPC has an integrated camera, use the **Pict** tab located at the top of the Materials tab to insert your pictures. Tap on the Pict tab to pull up the picture insertion window.

Tap on the Browse button to identify where the picture is located in the PocketPC. Then pick the picture. This will tag the picture into the correct position within the report.

Additional Information about Pictures and Diagrams

When the “Picture #” button is selected in the Comment tab view a Picture Tag Insertion dialog will come up and will default to the next Picture Number. Each time the “Picture #” button is selected the Picture Number will be incremented by one. This number can be changed by selecting the “+” or “-“ button. You can also reset the Picture Number back to “1” by selecting the “Reset Counter” button. Selecting the “OK” button will then insert into the Comment area for this Step a Picture Tag.

The Picture Tag will consist of a beginning tag “***” and then the actual picture counter followed by the scaling factor. An example would be “***Picture-1;Scaling=100***”. This is a Picture Tag for picture 1 with a scaling of 100%. You can also change the scaling factor by changing the number after the “Scaling=” part of the string. If you change the scaling value to “200” then the picture would print twice the normal size. If the scaling factor is changed to “50” then the picture would print half the normal size. Resizing the picture applies to printing of the narrative report and not the Matrix Deluxe style report. The pictures are automatically scaled in the Matrix Deluxe report.

When the picture tag is inserted into the text area for the current Step it will be replaced with the corresponding picture when the inspection is printed. **Notice: Many digital cameras take pictures at 4 or more megapixels. High resolution means large data files which can quickly fill up your computer memory and slow down your programs. High resolution is useful when reprinting photos in large formats but not necessary for pictures that appear in an inspection report. For reporting purposes pictures in the 1 to 2 megapixels work best.**

Diagrams – Diagrams can be automatically included in the printed report also. By using TemplateMaker you can associate any material or comment with a diagram. When this material or comment is selected during the inspection process the associated diagram’s pathname is inserted into the comment area for that Step. When the narrative inspection report is printed the associated material is then printed alongside the material or comment it is associated with. Below is an example of a Material “[Knob and Tube]*” associated with a diagram “0049.JPG”.

In the example above, the diagram tag “***Path=C:\Diagrams\0049.JPG;Scaling=100***” contains the pathname to the diagram. When the inspection is printed the diagram tag will be used to find the associated diagram while printing and will be included during the printing process. If the printing of the inspection is done on a handheld type of device (narrative reports only) then the diagrams need to be present on a type of media that can be inserted into the handheld. Many of the possible storage media devices range from a CF (CompactFlash) card, SD (Secure Digital) card or Multi Media card. If the diagrams are on a PC or CD then copy the diagrams needed onto this media. You will also need to enter the volume pathname in the Options field “Default Pict Path”. This field represents the name of the storage media that the diagrams are on. The pathname for the Diagrams uses this field to change the pathname to gain access to the diagrams when printing.

Additional Information about Comments.

Fill-in-the-Blank Comments – Some comments may contain an insertion caret (“^”). When a comment containing this caret is picked, the user will be prompted to supply information to “fill-in-the-blank” for that comment.

Pick list comments – InspectNOW comes with a robust comment library. Each step has numerous comments. The first comment (displays in brackets [1]) in each step is an “Appears Serviceable” comment. While it is not necessary to state the step is in serviceable condition if the Appears Serviceable rating has been picked, some inspectors want to be able to restate the serviceable condition. The second comment bracketed as [2] is a comment that states further evaluation and repairs are recommended. Again this option is also available in the step rating. Additional comments appear organized by topic. Many of the comments have labels that appear in brackets to help the user identify the comment without having to read the entire comment. See information on Comment Labels below. Comments can be edited in Template Maker or on the PocketPC. See additional information below.

Adding a comment on the fly - If the comment you need is not already in the list, simply write or type it into the comment entry area. To add a comment to the pick list of comments, just tap the “Add” comment button. The comment will now be available in the list for future inspections. (Note – To edit or delete comments from the list you must use Template Maker on the PC and download the changes to your handheld device. You cannot edit or delete comments from the pick lists themselves.) Refer to the Template Maker User’s Guide for more details.

Pick List items - You can also have another pick list inside embedded within your comments. An example could be "Limited review due to ^pReview^." where the "pReview" List item has the following list items (“snow”, “junk”, “boxes”, “furniture” etc. . This makes it possible to pick one of these choices to fill in the blank instead of writing or typing it in. This is a powerful feature, allowing the inspector to customize the comment options to their inspection style and geography.

Comment Labels - You can begin a comment with a label that helps designate the content of the comment when it is selected. Example the label [major] for a comment in the “CRACKS” group of comments would indicate that the comment was about major cracks visible at time of inspection. Labels can also be used to determine the order or groupings of comments. In InspectNOW the first comments in every comment library are designated by a [1] Appears Serviceable and a [2] for Recommend further evaluation and repairs.

Viewing Comments Only - Once you have completed your inspection the Inspection software lets you review your selected comments with your client by using the "Review Comments" window. To view a list of all of the comments entered for the current inspection select "Review Comments" from the "View" menu. A scrollable list of comments will appear. To view or edit any comment from the list, simply double-tap that comment. When you have finished with the comment tap the “OK” button to return to the comment list.

The View Rating drop down list will list all of the ratings you are using when you select the down arrow. Selecting one of the Ratings will narrow down the Comment list to just the one selected. Selecting the “Summary Comments Only” checkbox will narrow the list of Comments to the ones only rated that would appear on the Summary report.

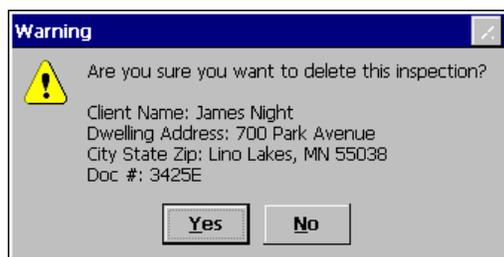
Additional Information about the CC/ Info Tab

The "Info" tab in the Step Detail window is another power feature of InspectNOW. These tabs come preloaded with much of the information included in Code Check® 4th Edition. The information appears in the respective Steps, thus electrical wiring info is found on the CC / Info tab in the Electrical Wiring Step, Heating Ventilation in the Heating Ventilation step etc.

None of the data present in the "Info" tab appears in the report, it is for reference only. Any Step that has reference material like this will have the CC / Info tab in the Step List Window. Tapping on this tab brings up the respective information. Additional information can be added to this section valuable tool by the inspector using Template Maker. See Template Maker User's Guide for more information.

Deleting an inspection

To delete an inspection from the Inspector application you go to the Inspection List view and select the inspection you want to delete. Then select "Delete Inspection" from within the "File" menu. A Confirm dialog comes up that shows the properties of the inspection you are about to delete. Tap the "Yes" button to confirm the deletion. A progress bar will appear as the inspection is being deleted. This can sometimes take a few minutes to complete. Please wait until the delete is completed. **Do NOT reset the handheld device while the deletion is being done.**



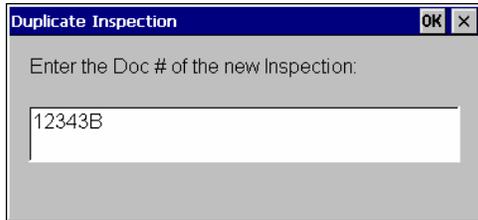
There is also a Delete All Inspections function. This could be used after the inspections have been exported as an RTF file. This makes it easier to delete the inspections all at once and keep the number of inspections on a handheld at a minimum number. **Important Notice: Make sure to back up inspection data and reports before deleting inspection report data. All data should be backed up regularly. If you make modifications to the report in InspectNOW Office before generating the Matrix Report, the report will differ from the inspection data initially exported from the handheld. For this reason, it is recommended that all inspection reports be backed up and archived by the inspector. See Back Up to a PC at the end of this guide for more information.**

Duplicating an inspection / Creating a Template Inspection

To duplicate an inspection from within InspectNOW Inspector application you go to the Inspection List view and select the inspection you want to duplicate. You then tap the "Duplicate Inspection..." button. When the Duplicate Inspection dialog comes up (Diagram 1.19) then enter a new document number for the newly duplicated inspection. This way you will be able to distinguish it from the original. Tap the OK button and the currently selected inspection will be duplicated along with all of its Categories, Steps, Ratings, Materials and Comments. This is a good way of creating a generic inspection template and then using it as a base inspection to start from. This can help shorten the inspection process on site.

WARNING: Using the Duplicate Inspection feature can also make it easier to make mistakes and forget to change previous set defaults. Use this feature very cautiously.

Diagram 1.19 - Duplicate Inspection Dialog



Using Expanded Text

InspectNOW has the ability to use a type of short-hand called Expanded Text. This feature can be used in any of the Comment text entry areas. The inspector either types or writes in the short-hand code followed by the “@” symbol. InspectNOW then automatically expands the short-hand code into its associated text. An example of this feature could be an Expanded Text code of “**rr**” that could expand to the following text: “**Recommend further evaluation and repairs by a qualified professional.**” Expanded text can be of any length from one word to an entire paragraph. There is a “@” button on the Comment text entry area also to make it easier to use the Expanded Text feature.

InspectNOW comes with the following three expanded text comments:

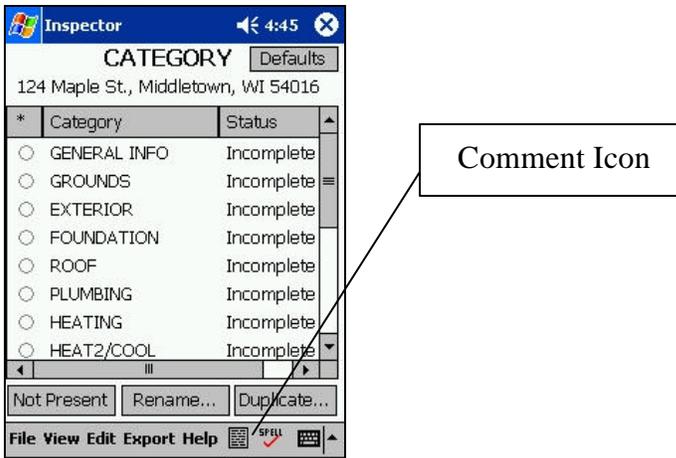
rr = Recommend further evaluation and repairs by a qualified professional.
rs = Recommend further evaluation by a structural or geotechnical engineer.
ss = Appears Serviceable

Additional comments, or editing of the above comments can be done using Template Maker. See Template Maker User’s Guide for additional information

General Comments

You can also have comments that are particular to an inspection that you want to show at the beginning of your report or the beginning of a Category . This is a general comment or disclaimer that pertains either the entire report if placed at the front or the specific category if placed in the category. In the Matrix Deluxe report we use this function to place the categorical disclaimers. In the Narrative report a comment could be placed at the beginning to apply to the entire report. To enter this comment area, tap the Comment Icon button on the taskbar at the bottom of the screen when you are inside the respective category or at on the inspection set up screen if you intend to have the comment precede the narrative report.

(See screen shot next page)



Printing a Narrative Report or Report Summary

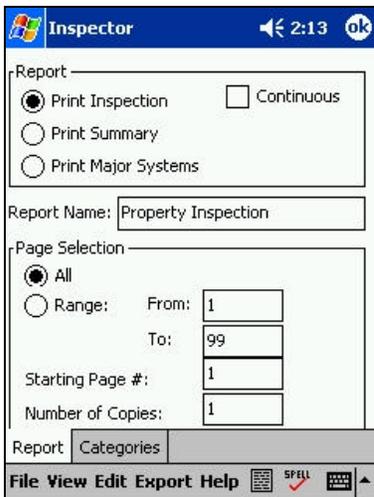
Important Notice: To print the Matrix Deluxe style report you must export the data file to InspectNOW Office and open the file in InspectNOW. InspectNOW is the program that creates the Matrix Deluxe style report. See the InspectNOW Office User's Guide for detailed information on exporting / importing the data file, and creating the Matrix Deluxe style report.

To Create a Narrative Report / Print A Summary from the PocketPC

Go to the "View Menu" and tap "Inspection List". To print a report take the following steps: Select or open the inspection you wish to print. (Note – single tap selects the inspection, a double-tap opens the inspection.)

Once you have selected (or opened) the inspection you wish to print, go to the "File" Menu and tap "Print..." A "Print Properties" dialog will appear (Diagram 1.13) giving you the Print Report options.

Diagram 1.13 - Print Properties dialog



Inspection Report -By default, you can print the full inspection report. Selecting the "Print Inspection" radio button will print out the entire inspection with all the data you collected for the current inspection. A page break is inserted after every Category when you print the report. This makes it much easier to reprint a single Category when changes are made without having to reprint the entire report.

Continuous option - If the "Continuous" check box is checked this suppresses the page break after every Category in the inspection report. Each new Category and its associated Steps are printed after the previous Category in a continuous report that makes the report shorter and a little quicker to print. The disadvantage of printing the continuous report is when you need to reprint a specific Category you will need to reprint all the Categories after the correction in the report. If each Category has a page break you only need to reprint that one Category again.

Print Summary – Select the “Print Summary” radio button to print just the Inspection Summary Report. This is a condensed report that only prints out the Steps and Comments that were flagged as significant and should appear on the Summary. This is controlled by the rating choice that is selected for each Step. An example could be a rating choice called "Repairs Recommended" that would force the Step and any Comments for that Step to print on the Summary report.

Controlling which rating choice has the Summary flag set is set in TemplateMaker. (Refer to the Template Maker User’s Guide for more information)

Page Selection – To print specific pages select the “Pages” instead of “All” and then fill in the “From” field and then the “To” field. If you needed to print page 9 over again you would select the “Pages From” radio button and then put the number “9” into the “From” and “To” fields. (Note: If you change the “Starting Page #” field then make sure to change the “From” and “To” fields appropriately.)

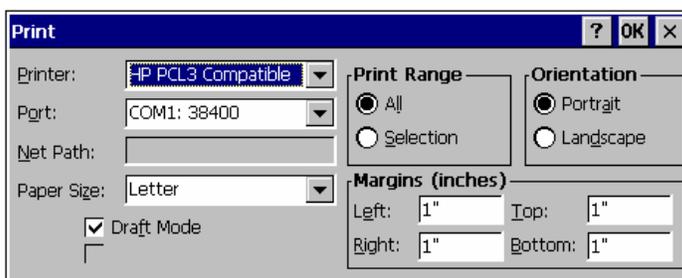
Starting Page # - If there are other preprinted pages you need to include in your report before the inspection report you can change the beginning starting page number that is printed from the InspectNOW software. If you want to include a 2 page legal contract at the beginning of the report, before the regular categories, then the Starting Page # would be changed to 3.

Number of Copies – Use this field to print multiple copies of the report you are printing. You can use it for the full inspection report or the Summary report.

Print Dialog

Once you have selected the type of report you want to print and the print options in the Print Report dialog and have tapped the OK button the standard Windows print dialog (Diagram 1.14) will appear as shown below.

Diagram 1.14 - Print Dialog



Select the appropriate printer you are printing to in the "Printer" drop down list (some examples are the "HP PCL3 Compatible" for the HP 340 and the "Canon BJC" for the Canon BJC-80 printer) and then select the "Port" type you are using to print from. Some of the options that are available in the "Port" menu item are "USB", "Irda", COM1, and JETCONNECT. There is also a "Print Preview" option then you can select in the "Printer" drop down list to preview the reports on the handheld before actually printing the report.

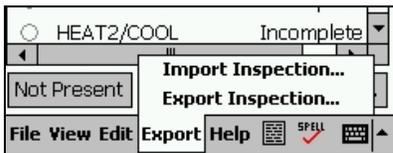
Checking the "Draft Mode" checkbox in the "Print" dialog can significantly increase the speed of printing the reports.

Tapping the "OK" button on the "Print" dialog brings up the last dialog that has other options that are dependent on what Printer driver you selected in the previous "Print" dialog. To get more information on the specific options and settings available in the JETCET PRINT dialog (Diagram 1.15) tap the help (?) button in the dialog.

Merging partial inspections

Sometimes during big inspections it would be beneficial to be able to have more than one inspector at the inspection site. InspectNOW can merge partial inspections together from multiple inspectors to create a final inspection. There is no limit to the number of partial inspections that can be merged. The inspection job can even be broken up within a single category. This means that one inspector could be inspecting the appliances in the Kitchen category while another inspector is inspecting the electrical outlets. When the merge process occurs the software will successfully merge the separate steps within the Kitchen category appropriately.

To start the merge process you must decide who will have the final completed inspection. The other inspectors will then need to select their partial inspection they have completed and then select the "Export Inspection" menu item from the "Export" menu.



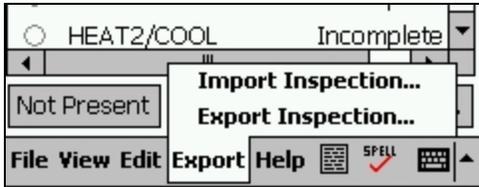
The "Save As" dialog (Diagram 1-20) will come up where you will browse the Folder window identify where you want to save the partial inspection file. Name the partial inspection what you want in the "Name:" field and select the "Save" button.

Diagram 1.20 – Save As dialog



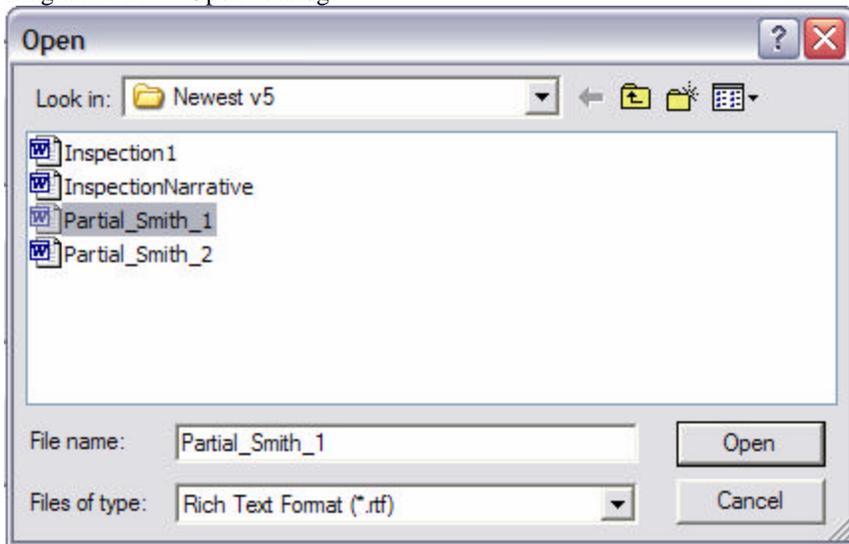
Once you have exported the partial inspections from the other inspectors you will need to get these exported files to the master device where the final inspection will be completed from. This can be accomplished by either copying the file to an external media device like a CF card, SD card or you can transfer the file from your PocketPC to your PC using ActiveSync. This is a simple copy and paste function.

Once the partial file(s) are transferred to the computer or device that the final inspection will be created on you will then launch the inspector app that contains the final inspection and select the “Import Inspection” from the “Export” menu.



From the “Open” dialog (Diagram 1-21) select the partial inspections you have exported from the list and select the “Open” button. This will add this inspection to the list of imported inspections in the inspection database. You can select as many as you want if there were more than one inspector that completed parts of the full inspection. You can import these partial inspections at any time. The inspector in charge of the final inspection could be half way through their portion of the inspection and import the partial inspections of the other files and then complete their portion and merge all of the data together at a later time.

Diagram 1.21 – “Open” dialog



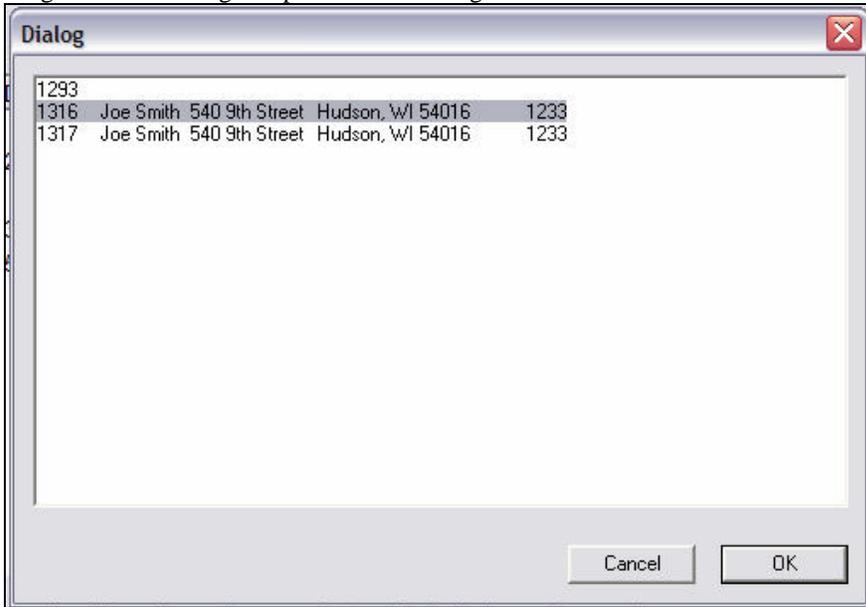
Once the partial inspection files are imported and you are ready to merge all the data together you select the master inspection you want to merge into from the Inspection List view in InspectNOW. Once the inspection is highlighted you select the “Merge Inspection...” button. In the example below (Diagram 1-23 & 1-24) we are selecting the inspection for Joe Smith and merging in the partial inspections with the inspection numbers of 1316 and 1317. Once the partial inspection documents are merged in you will be able to see all the inspection data in the original inspection plus all the partial inspection data merged into it also.

Remember inspections can be merged across handhelds of the same type or even across a CE tablet and a PocketPC. Some inspectors will also use the merge feature to do a partial inspection on a handheld and then export it and merge it into the original inspection on the PC version of inspector.

Diagram 1.22 - Sample of merging inspections

INSPECTION LIST			
Client Name	Dwelling Address	City, State Zip	Doc #
My Name		Hudson, WI 54016	3444
Joe O'Rear	200 SUnny	Nixa, MO 65714	2344
Orear Two		Nixa, MO 65714	4555
Joey Rindahl	3330 Arbor Vitae Ln.	Plover, WI	291
Joe Smith	540 9th Street	Hudson, WI 54016	1233

Diagram 1.23 – Merge Inspection List dialog



Backing Up to a PC

As with all computer systems, it is important to back up your critical data on a regular basis. Borealis recommends daily backups of your inspection data.

Please refer to the documentation that shipped with your hardware for general backup instructions for your handheld device. Microsoft ActiveSync (a program that runs on your PC and communicates with your connected handheld device) provides an easy means for backing up to the PC. You will find the “Backup/Restore” menu item in the Tools menu.

Perhaps the simplest way to backup inspection data is to use the “Export RTF...” feature from the file menu and transfer the corresponding document to your PC. This is a standard process when creating the Matrix Deluxe style report. The data files for all such reports must be exported from the PocketPC or PC application into InspectNOW Office to format the report. Changes made to the report in InspectNOW Office will not be reflected in the original inspection data file on the PocketPC or PC. It is important to back up the InspectNOW reports regularly, we recommend daily.

It is recommended that you back up your critical PC Data to some type of removable media such as a CD, flash drive, media card or external hard drive. Unfortunately computers are subject to damage and failure, in such situations it may be impossible to recover your inspection data if you do not back it up as recommended. Check with your local computer hardware retailer for additional information on back up options.

Backing Up to a CF or PCMCIA card

Another easy way to backup and restore your handheld data is to use a Compact Flash(CF) card or SD (Secure Digital) card. These memory cards come in many sizes from 128MB multiple gigabytes. Reference the associated manuals for more information on how to backup and restore using these cards and the 3rd party backup applications that come with each handheld.

Technical Support

InspectNOW is created by Borealis Communications, LLC for Kaplan Professional Schools – Inspection Training Associates. Contact Borealis directly for technical support. Upon initial purchase InspectNOW comes with unlimited support for 30 days. Additional support can be purchased in one year increments.

Borealis contact information:

Phone: 715-381-1633

Email: support@borealisweb.com

Web: www.borealisweb.com

Definitions of Terms

Back up – refers to saving data files, inspection reports, etc. to a secondary location, preferable outside the computer or handheld device. Back up files are used in emergencies if the primary system is damaged or corrupted. In today’s world of computer viruses, it’s imperative that inspection data is backed up regularly.

Category – a major component of a residential property Example: Electrical. A category is the highest level of data organization in InspectNOW. Data collection is organized by Category, then Steps, then Ratings, Materials and Comments.

CC / Info – a tab that appears at the step window providing the user with access to Code Check® 4th edition and other supporting information.

Comments – narrative information provided to clarify conditions that exist at the time of inspection.

Comment Library – InspectNOW comes with a robust collection of preformatted comments that can be inserted in the comment sections throughout the report. The comment library can be edited in Template Maker. Comments can also be typed in or written in using the PocketPC writing recognition program. See the user’s guide that came with the PocketPC device form more information.

Dialog – refers to a window that opens on the PocketPC. The window can be filled with a various information, choices and additional options.

Doc # - a unique number given to each inspection. Document numbers appear in the upper right corner of the Matrix Deluxe reports and on the inspection contract. Document numbers should be unique for each inspection, often inspectors use a combination of the clients name and the date.

Edit – to modify existing text or in the case of a pick list or comment to add additional information.

Expanded Text – a “short-hand” of sorts allowing the user to enter only a few characters followed by the @ sign from which the program will insert an entire sentence or paragraph.

Pick List – a list of options that can be picked by taping the desired option on the screen. Pick lists are crated in Template Maker and are used to “fill in the blank” within various locations and comments in the comment library.

PocketPC – a handheld device used to collection inspection information out in the field. It is the portable data collection hardware on which InspectNOW for PocketPC is installed.

Material – a third level of data organization used to identify conditions that exist at the time of inspection, location of specific items, or the actual material that something is made of.

Ratings – short comment used to identify if a system appears serviceable or needs additional evaluation and/or repairs.