



User's Guide

v2.0

KAPLAN PROFESSIONAL
SCHOOLS

Inspection Training Associates

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Inspection System Overview

General Introduction

InspectNOW is designed to give inspectors the ability to rapidly gather home inspection information directly into a hand-held computer such as a laptop, tablet PC, or ultra-mobile PC.

InspectNOW can accelerate the inspection data collection and reporting process. With InspectNOW the data is quickly captured electronically from the start and throughout the inspection. This system eliminates the need to re-key information into a computer back at the office.

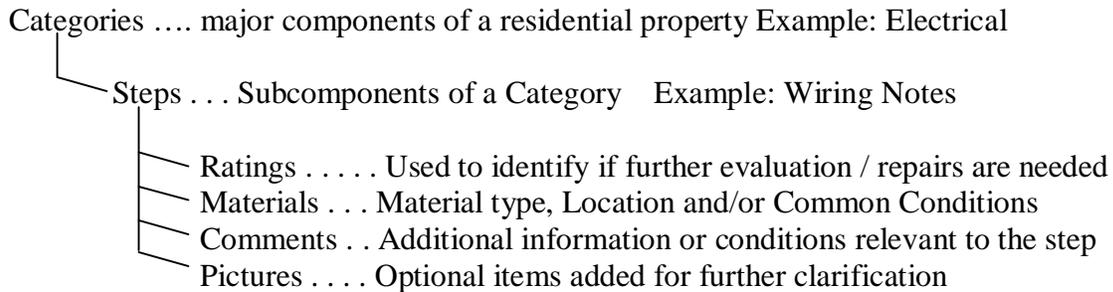
One of the most powerful features of InspectNOW is its flexibility. By using Template Maker, a unique feature included in InspectNOW, the user can customize categories, steps (components), material checklists, ratings, comment libraries, and comment pick lists used in the data collection process.

In addition, the system is designed to make on-site electronic data collection and report generation fast, feasible and affordable. InspectNOW offers the ability to create two styles of reports: ITA Matrix reports and Narrative (non-Matrix) reports. ITA Matrix reports will be generated as a PDF document, which provides you the option to print the report on site, send it as an email attachment, or post it to your website for viewing. Narrative reports will be generated as a file which can be opened with a word processor and edited as you see fit to create your own unique, custom report.

Data Model

InspectNOW helps the user collect data for many types of inspections. Shipped with InspectNOW is the Property Inspection template (referred to as Inspection Type in the software). The Property Inspection template is organized like the industry standard Matrix Deluxe inspection forms, including the conditions most commonly found during a residential inspection. Also included is a robust comment library. The user simply clicks on the comment of choice or enters a customized comment to expand on the conditions noted in the report. The Property Inspection template allows for unlimited user modification and customization. In addition, the user can create a custom template from scratch to address unique inspection needs. This approach accommodates all types of users, from those just entering the profession and looking for simplicity and safeguards in their reporting system to the more advanced inspector that wants to create their own custom reports.

Each document has the following hierarchy:



Categories – includes the major components of the typical residential property inspection:

- Grounds
- Exterior
- Foundation
- Roof
- Plumbing
- Heating
- Electrical
- Interior
- Garage
- Kitchen
- Bathrooms
- Pool / Spa

Categories can be duplicated within the report. An example would be Bathrooms. The inspector can create numerous bathroom pages to better identify each bathroom on the property, each with a unique name.

Each Category is made up of a series of Steps (components) specific to that Category. For example, in the Kitchen Category you will see Steps for Kitchen Sink, Disposal, Range/Cooktop, Dishwasher, etc.

Steps - Each step has a Step Detail Window where the following types of data/comments are collected along with the Code Check tab. These include:

Rating – The inspector uses a drop down or pick list to pick the rating of choice. Ratings options include:

- Appears Serviceable
- Repairs Recommended
- Safety Hazard
- N/A (Not Applicable)

Materials – Materials appear as a series of check boxes that identify:

- Type of building material such as Stucco
- Location such as Patio
- Common Conditions such as Major Cracks

Comments – used to provide additional comments about the condition of the step. Comments can be picked from a categorized comment library (Pick Comments button) or they can be entered at the time of inspection. Comments entered at the time of inspection can be added to the comment library for future use (Add to Template button) or used in the one report only. This section of the report expands as needed to accommodate all comments - there are no space limitations.

Code Check – 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.

InspectNOW Installation

Insert the InspectNOW installation CD into your CD-ROM drive. Provided that you have the AutoPlay feature for your CD-ROM drive enabled, the installation should launch automatically. If the installation does not start automatically, simply open the contents of the CD and launch setup.exe.

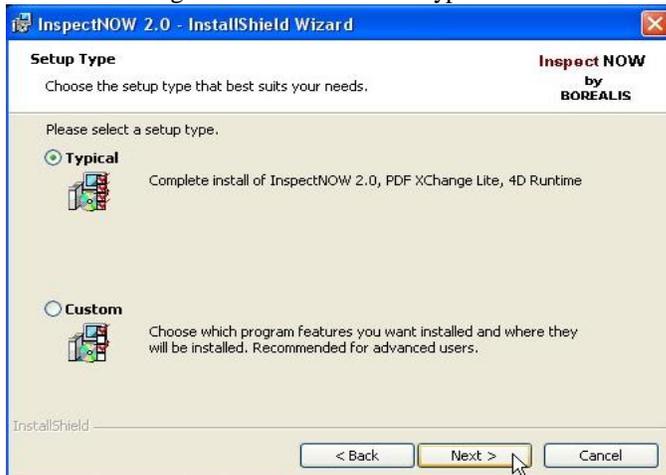
Once the InspectNOW installer has launched properly, you should see a welcome screen like the one pictured in diagram 1.1.

Installation Diagram 1.1 – Welcome Screen



Simply follow the prompts on the screen to install the software. All components of InspectNOW will install as part of the “Typical” installation.

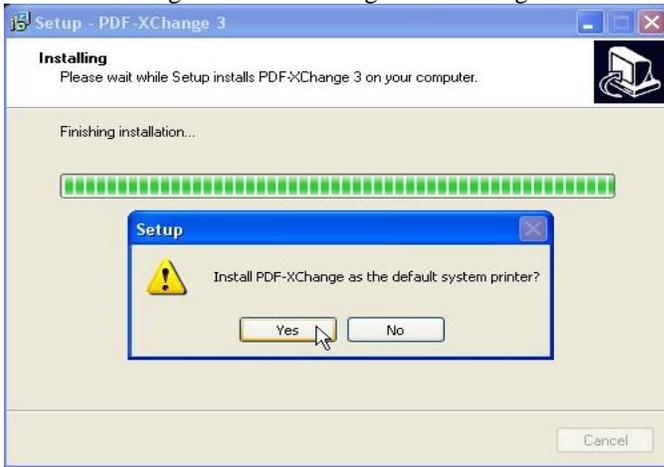
Installation Diagram 1.2 – Installation Type



There are three components of the software installation: InspectNOW, 4D Runtime, and PDF XChange. InspectNOW is the primary component which you will run on your PC. 4D is the database engine that works behind the scenes to manage the data for InspectNOW. PDF XChange is the program which will generate reports in a PDF format.

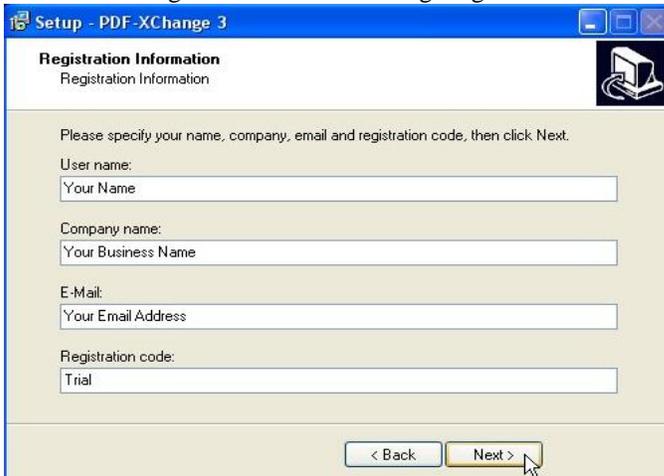
NOTE: As part of the installation process, you will be prompted to choose whether or not you would like to install PDF XChange as the default printer (see diagram 1.3). You will need to select “Yes” in order for the software to run properly.

Installation Diagram 1.18 – Setting PDF XChange as default



NOTE: Also as part of the installation process, you will be prompted to enter some information as for PDF XChange. Enter your Name, Company Name and Email Address (if available), but make sure you leave the Registration Code field set as “Trial”.

Installation Diagram 1.4 – PDF XChange registration info



Once the installation has completed, make sure that you restart your computer prior to launching and using the InspectNOW software.

Starting InspectNOW

To start the InspectNOW application, double-click the InspectNOW shortcut that was placed on your desktop as part of the installation process.

NOTE: An alternative method of launching InspectNOW is to go to your Start menu, select Program Files (Windows XP and prior operating systems) or All Programs (Windows Vista), and select the InspectNOW Programs group. From there you will also find a shortcut that will allow you to launch InspectNOW.

Installation Diagram 1.5 – InspectNOW Program Group

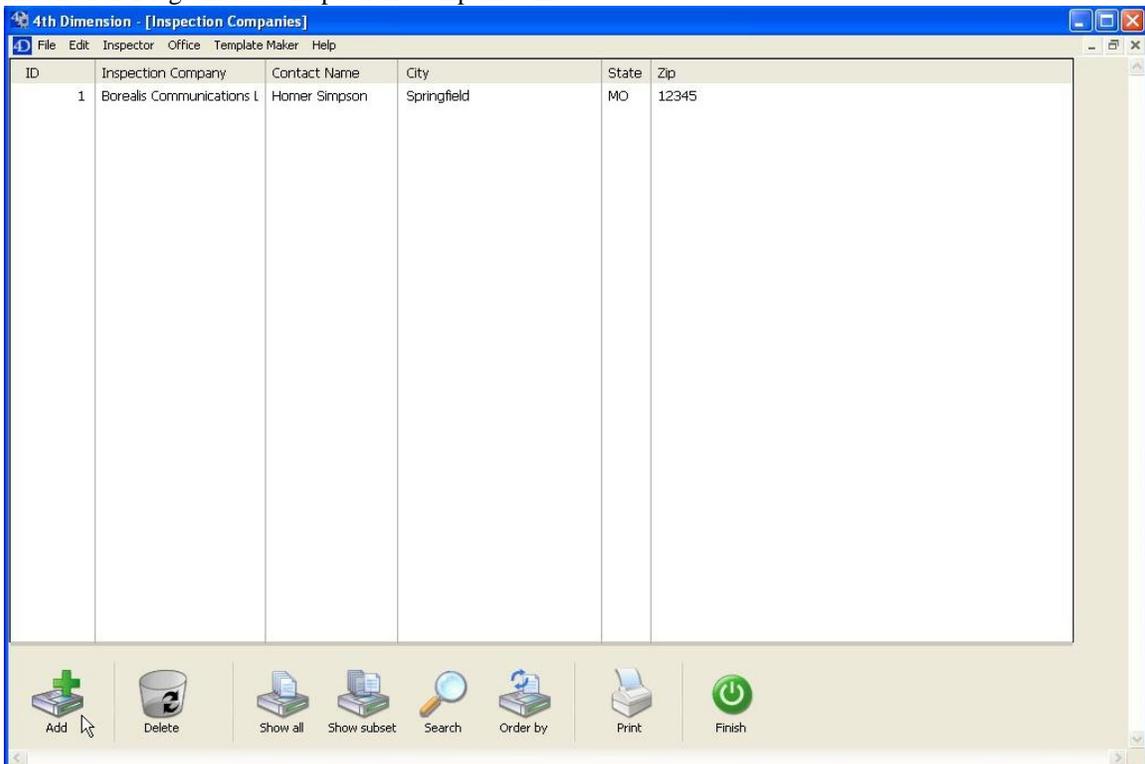


Setup an Inspection Company and Logo

Once you have installed and launched InspectNOW you will want to customize the Inspection Company and Company Logo information to reflect your unique business.

From the “Office” menu select “Inspection Companies” and a list will appear.

Installation Diagram 1.6 – Inspection Companies List



To add your company to the list, click the “ADD” button located in the lower left portion of the screen and the Inspection Company entry screen will appear.

Installation Diagram 1.7 – Setting up a new Inspection Company

The screenshot shows a software window titled "4th Dimension - [Inspection Companies]". The window has a menu bar with "File", "Edit", "Inspector", "Office", "Template Maker", and "Help". Below the menu bar is a toolbar with icons for "Save", "Cancel", "First", "Previous", "Next", "Last", and "Delete". The main area of the window is titled "Inspection Company" and "1 of 1". It contains several text input fields: "Name", "ContactName", "Address", "Address Line 2", "City/State/Zip" (with separate boxes for state and zip), "Work Phone", "Fax", and "Logo". The "Logo" field has a "Browse" button next to it. The "Save" button in the toolbar is highlighted with a mouse cursor.

Enter your Name, Company Name, Address, and all other appropriate fields.

To add your company logo, simply click on the button labeled “BROWSE”, locate the graphic on your computer, and double-click that graphic to enter it into the logo field.

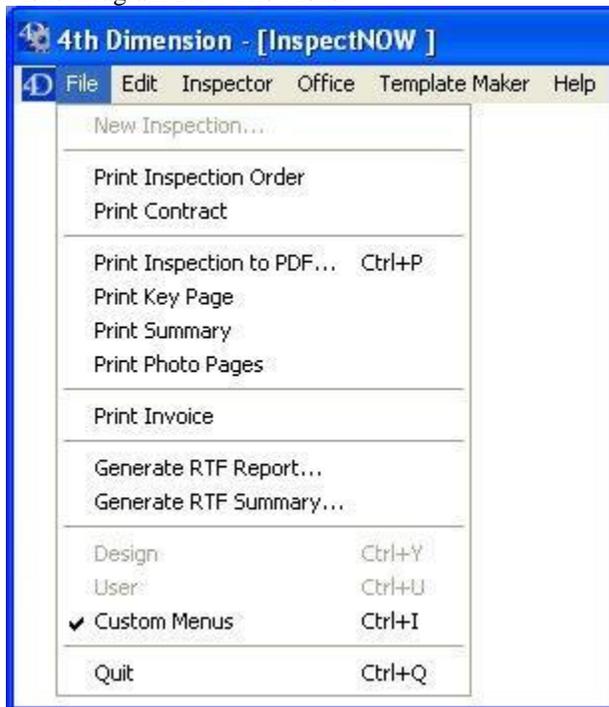
When you are finished entering all information, click on the “SAVE” button located in the top left corner of the screen to retain your changes.

InspectNOW Menus

File Menu

Use the File menu to create new inspections and various types of inspection reports. Use the “Quit” option to exit out of InspectNOW.

Menu Diagram 2.1 – File Menu



New Inspection – Create a new inspection record. This item is not available if an existing inspection is already open.

Print Inspection Order – Create the “Work Order” for an existing inspection. ¹

Print Contract – Print the contract for an existing inspection. ¹

Print Inspection to PDF – Create a read-only file (PDF format) of an existing inspection and its various components that can be attached to an email, saved to disk, or printed. ¹

Print Key Page – Create a separate read-only file containing the Keys to the Inspection report. ¹

Print Summary – Create a read-only file containing the Summary section of an existing inspection report. ¹

Print Photo Pages – Create a read-only file containing the Photo Pages section of an existing inspection report. ¹

Print Invoice – Create a read-only file containing the Invoice for an existing inspection. ¹

Generate RTF Report – Create a RTF file of an existing report and its various components which can be opened in a separate program (i.e. Microsoft Word) for custom editing.

Generate RTF Summary – Create a RTF file of the Summary section of an existing report which can be opened in a separate program (i.e. Microsoft Word) for custom editing.

Custom Menus – By default, InspectNOW is always in custom menus mode.

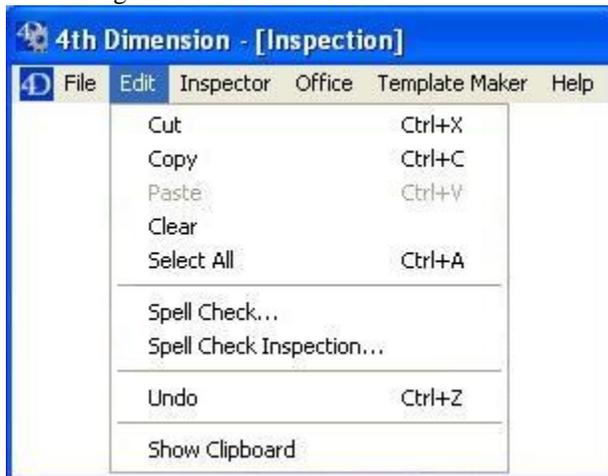
Quit – Exit the InspectNOW program.

¹ - An existing inspection must be selected from the Inspection List in order to use this item.

Edit Menu

The edit menu contains standard cut, copy, and paste functions that are found in most Windows programs. In addition, Spell Check items can also be accessed from this menu.

Menu Diagram 2.2 – Edit Menu



Cut – Standard Windows “cut” functionality. Deletes the selected text and places it in the Windows clipboard.

Copy – Standard Windows “copy” functionality. Places a copy of the selected text in the Windows clipboard.

Paste – Standard Windows “paste” functionality. Places Windows clipboard contents (from Cut or Copy) into the selected field.

Clear – Deletes the entire contents of the field in which the cursor is placed.

Select All – Standard Windows “select all” functionality. Selects the entire contents of the chose field for use with other actions (copy, cut, or clear).

Spell Check... – This item is context sensitive and will only be available when your cursor is in a text area. Use this item when editing comments, contract language, or other text areas within InspectNOW.

Spell Check Inspection ... – Runs a spelling check for all the step comments and photo text fields of an entire inspection. An inspection must be selected for this item to be active.

Undo – Standard Windows “undo” functionality. This will roll back to the last edit that was made. (Warning – this does not apply to some database operations such as “Delete Record”.)

Show Clipboard – Displays the contents of the Windows clipboard with the last item that has been “Cut” or “Copied”.

Inspector Menu

The Inspector menu provides functions which allow you to open and/or work with existing inspections. It also contains the InspectNOW preferences option.

Menu diagram 2.3 – Inspector Menu



Inspection List – Displays a list of all existing inspections. Double-click on an inspection in order to view detail and make changes.

Import Inspection – Allows you to import an inspection created on another computer running InspectNOW for viewing and editing. Will also allow you to import inspections from previous versions of InspectNOW software.

Export Inspection – Allows you to export an existing inspection so that it may be imported into another computer running InspectNOW.²

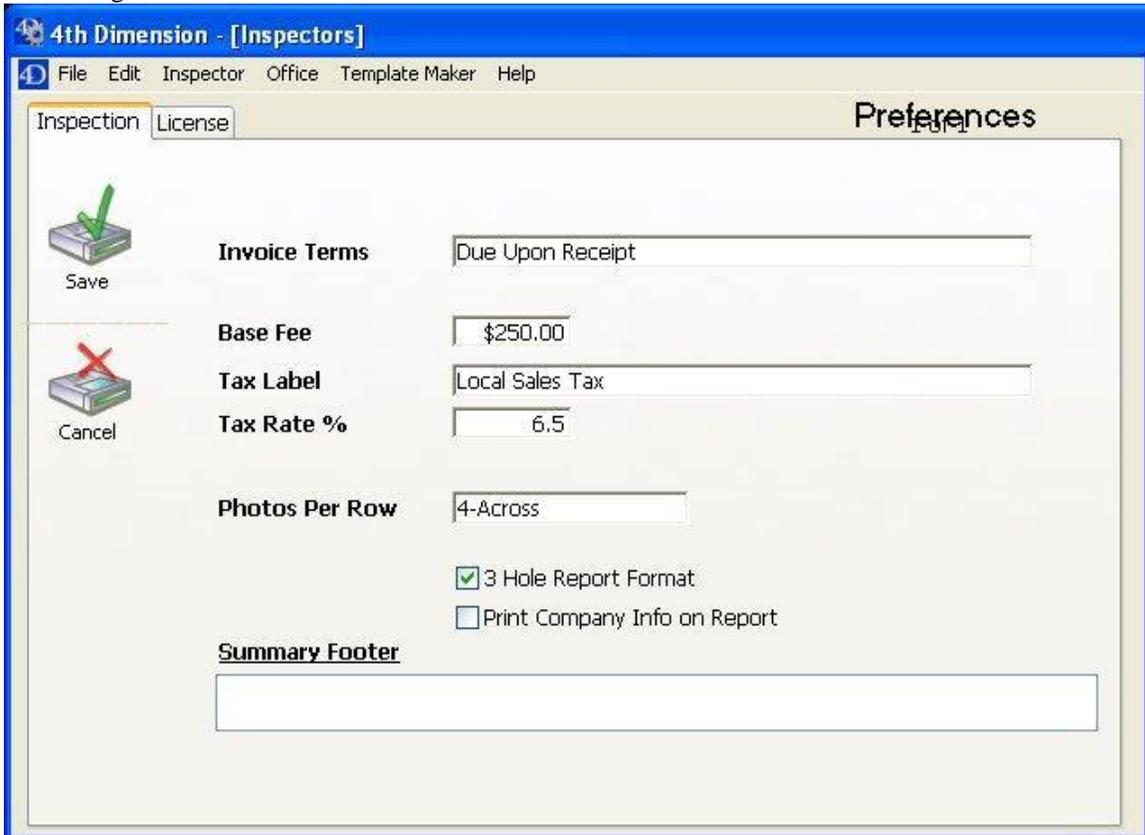
Merge Categories – Will allow you to merge categories that have been exported out of InspectNOW on another computer. This function effectively allows multiple inspectors to work collaboratively to create one inspection report.²

Export Categories – Will allow you to export categories from an existing inspection for import into InspectNOW on another computer. Used in conjunction with the Merge Categories function, will allow categories from partial inspections done by multiple inspectors to be merged into one inspection report.²

Preferences – Allows users to set preferences for multiple inspection report items including Invoice Terms, Base Fees, Tax Labels, and Tax Rates. In addition, you will use the preferences function to choose your Photo Page format – either 2 Photos across (total of 4 photos per page) or 4 photos across (12 photos per page). The preference section also contains a tab with your licensing information (see diagram 2.4). Once set, options in the Preferences functions will apply to all new inspections until changed.

2 – This feature is only available when using InspectNOW version 2.0 or higher.

Menu Diagram 2.4 – Preferences



Office Menu

The Office menu contains data lists and/or inspection report items which are available to every new inspection report.

Menu Diagram 2.5 – Office Menu



Inspectors – Displays a list of inspectors. Either click on the “ADD” button to create a record for a new inspector or double-click on an existing inspector record in order to view the detail and make changes.³

Agents – Displays a list of agents. Either click on the “ADD” button to create a record for a new agent or double-click on an existing agent record in order to view the detail and make changes. The agents in this list are linked to the Agent Information section of the Contact Info tab and made available as a pick list of agents to add to the inspection.

Inspection Companies – Displays a list of inspection companies. Either click on the “ADD” button to create a record for a new inspection company or double-click on an existing inspection company record in order to view the detail and make changes. The inspection companies in this list are referenced in the Company ID field located in the Inspection Information section of the Contact Info tab. Once a company ID has been entered into this field, every subsequent new inspection will continue to use that company ID until it is changed.³

Services & Fees – Displays a list of available inspection services and their corresponding fees. The services in this list are linked to the Services & Fees tab and made available as a pick list of services to add an inspection order. Either click on the “ADD” button to create a record for a new service or double-click an existing service in order to view the detail and make changes.

Contracts – Displays a list of available contracts. Either click on the “ADD” button to create a custom contract of your own or double-click an existing contract in order to view the detail and make changes. The contracts in this list are linked to the Contracts tab and made available as a pick list of contracts to add to the inspection.

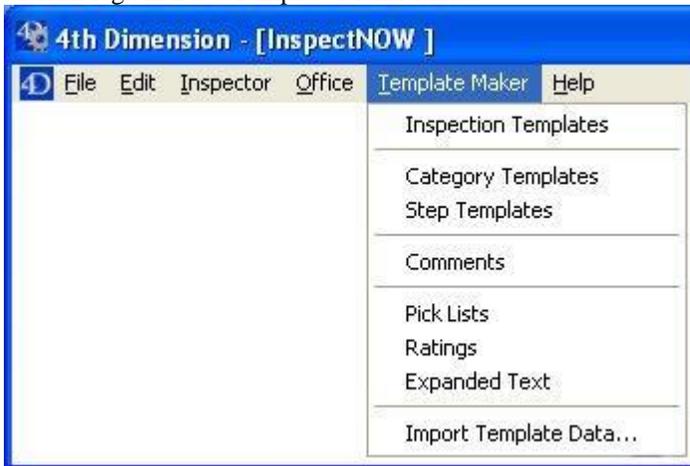
Customer Letters – This feature is currently set for future development.

³ – *This feature is only available for use prior to either creating a new inspection or opening an existing inspection.*

Template Maker Menu

The Template Maker menu contains items and functions which will allow you to create, edit, or delete data templates within InspectNOW. This effectively allows you to have the ability to completely customize virtually every aspect of your inspection reports.

Menu Diagram 2.6 – Template Maker Menu



For a more in depth explanation of Template Maker and all of its menu items, please refer to the Template Maker section of this user's guide.

About Menu

The About menu allows you to obtain license information for your copy of 4D Runtime interpreted. You can also obtain information about the current version of InspectNOW that you are running here.

Menu Diagram 2.7 – About Menu



Update License – Displays licensing information for your copy of 4D Runtime Interpreted.

About InspectNOW – Selecting this option will open a window which contains information about the current version and release date of your copy of InspectNOW.

Creating a New Inspection

Launch InspectNOW on your PC. This can be done from either the Windows Desktop or through the Start menu (see Launch InspectNOW on pg.7).

To create a new inspection document, open the “File” menu and select “New Inspection”.

Contact Info Tab

A new inspection record will be created and a blank Contact Info tab will appear (See Diagram 3.1).

New Inspection Diagram 3.1 – Contact Info Tab

The screenshot shows the '4th Dimension - [Inspections]' application window. The 'Contact Info' tab is active, displaying a form with the following sections:

- Client Information:** Includes fields for Last Name, First Name, Address, City/State/Zip, Work/Day Phone, Home/Eve Phone, and E-mail.
- Agent Information:** Includes buttons for 'Buyer's Agent...' and 'Listing Agent...', and fields for Agent Name, Company, and Cell #.
- Inspection Information:** Includes a dropdown for 'Inspection Type', a date field (09/27/07), a time field (9:00 AM), and a 'Prior Confirmation' section with radio buttons for 'Buyer's Agent', 'Seller's Agent', and 'Client'. There are also fields for Inspector, Ordered By, Referred By, and Company ID (1).
- Special Instructions:** A text area for additional notes.

On the left side of the form, there is a vertical toolbar with icons for Save, Cancel, Previous, Next, Print Work Order, and Delete.

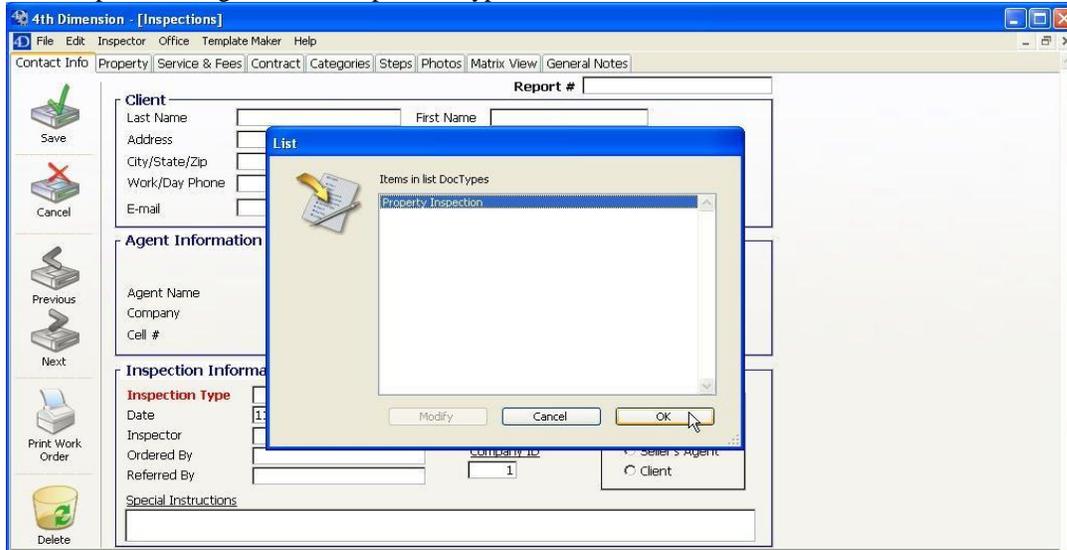
NOTE: To enter data into a specific field, click once on the field to place the cursor in that field, then type the information you wish to store in that field. Use the “Tab” key on your keyboard to navigate from field to field thereafter.

Enter a Report Number for the new inspection record. The Report # field is located in the upper-right corner of the Contact Info tab. You may use any format of report number that suits your record keeping needs best, but you must enter something into the Report # field.

Next, select the Inspection Type. The Inspection Type field is located within the Inspection Information section of the Contact Info tab. Simply click on the blank field next to the Inspection Type label and a pick list of available Inspection Types will appear (see diagram 3.2). Initially, the only available selection will be the Property Inspection template. Going forward, if you choose to create additional custom template using

Template Maker, those templates will appear in this pick list as well. Simply click on the name of the Inspection Type you wish to use with this report and it will automatically be inserted into the Inspection Type field.

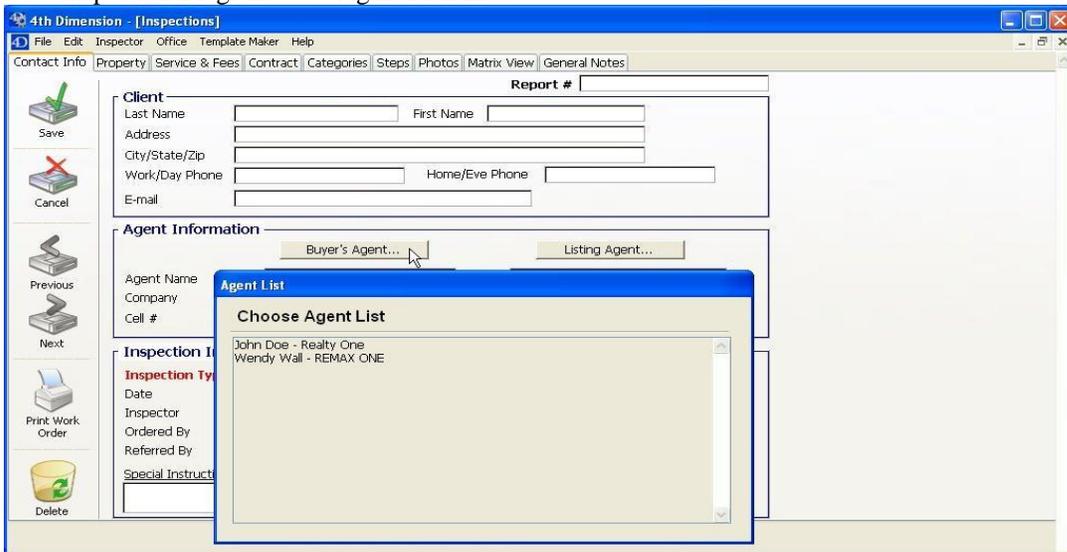
New Inspection Diagram 3.2 – Inspection Type



NOTE: You must make a selection for the Inspection Type field. Failing to make a selection of an Inspection Type will prevent you from being able to enter any inspection information later in the process of completing the inspection report.

Complete all necessary remaining fields. To change the Date and Time, simply tap on the portion of the date or time you wish to change and edit it accordingly. To enter Agent Information, either manually type in the agent names or click on the Buyer's Agent and Listing Agent buttons to pull up a pick list of available agents which already exist in InspectNOW (see diagram 3.3). Agent pick lists can be edited and added to as necessary (see Agents on pg.13).

New Inspection Diagram 3.3 – Agent Pick Lists



Property Tab

Click on the “Property” tab to view and edit detailed information about the property.

Inspection Detail – Property Tab

4th Dimension

File Edit Inspector Office Template Maker Help

Inspection

Contact Info **Property** Service & Fees Contract Categories Steps Photos Matrix View General Notes

Property Location SAMPLE

Address: 300 Quicken Loans Arena
City/State/Zip: Cleveland, OH 44011
Map Coordinate: MC 3456
Subdivision: High Point
Cross Street: Carnegie/Ontario

Directions: North until you hit Lake Erie. Left at the Jake. Park in the Gateway parking lot.

Property Information

Present at Inspection

Client Seller
 Buyer's Agent Seller's Agent
Others: Neighbor

Occupied Previously Inspected

Utilities On/Off: Utilities ON

Property Age: Over 30 Yrs | 1 Units
Roof Age: New | 4 Bedrooms
Sq. Footage: 2950 | 3.5 Bathrooms

Property Type: Single Family
Foundation: Combination
Additions/Alterations: Rear Deck

Start Time: 9:45 AM
Completion Time: 2:00 AM

Weather conditions at time of inspection...
Sunny and warm.

Save
Cancel
Previous
Next
Print Work Order
Delete

NOTE: To enter data into a specific field, click once on the field to place the cursor in that field, then type the information you wish to store in that field. Use the “Tab” key on your keyboard to navigate from field to field thereafter.

TIP: Time fields for start and completion time will accept a format of “8a” which will automatically convert to “8:00 AM”.

Services and Fees Tab

Click on the “Services & Fees” tab to view and edit information about the services and fees for the current inspection.

Inspection Detail – Services & Fees Tab

Invoice Detail

Invoice Date: 09/30/07 Invoice #: INV93007A
Inspection Date: 09/30/07 Terms: Due Upon Receipt
Inspector: Clouseau Paid By:

Services and Fees

DESCRIPTION	AMOUNT
Pool Inspeccion	\$145.00
BASE FEE	\$325.00
Pool Inspeccion	\$145.00
Expedite Fee	\$85.00

Tax and Total

TOTAL AMOUNT: \$700.00
PAYMENT: \$0.00
BALANCE DUE: \$700.00

NOTE: To enter data into a specific field, click once on the field to place the cursor in that field, then type the information you wish to store in that field. Use the “Tab” key on your keyboard to navigate from field to field thereafter.

Click the “Add Fee” button to add a service and fee line item to the inspection. A pick list of common fees and services will be provided. (Note – Refer to the “Services & Fees” item from the “Office” Menu to information about maintaining the list.)

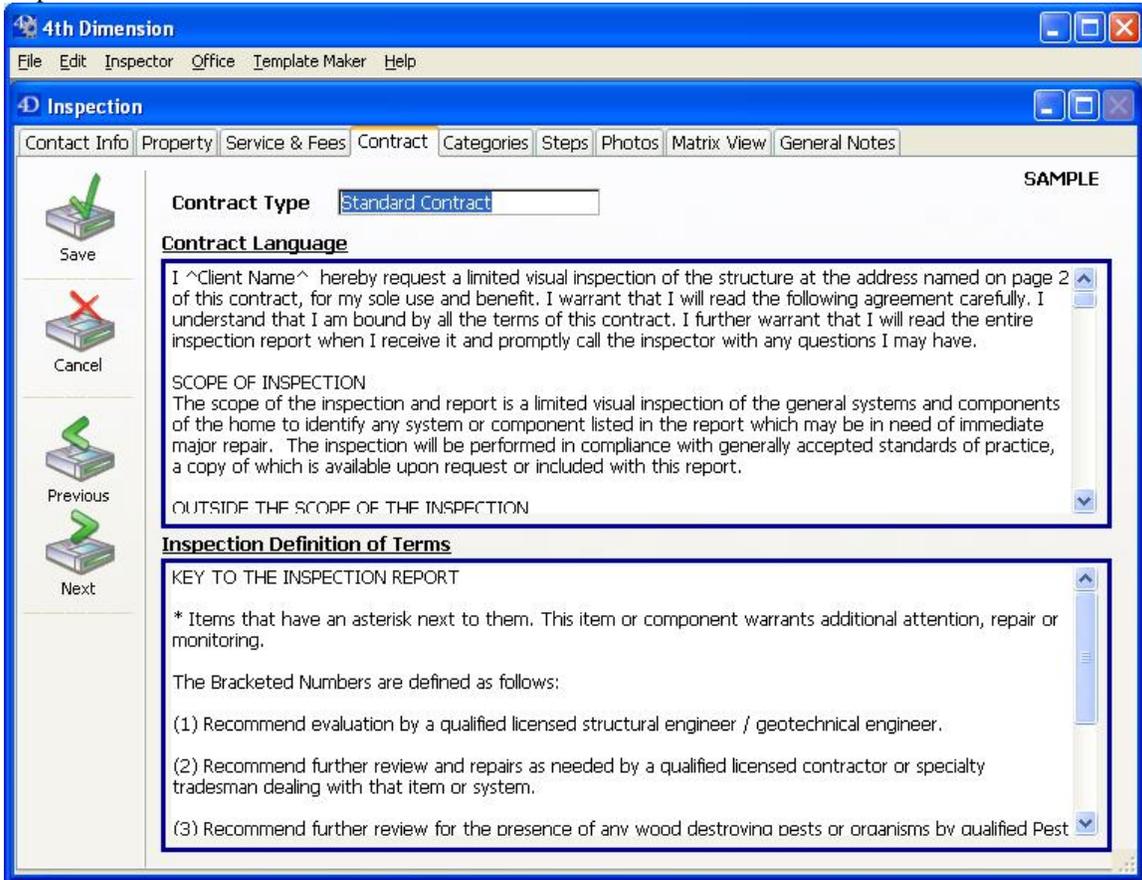
Click the “New Fee” button to create a new line item from scratch. Once an item has been created, edit the “description” and/or “amount” as desired. The change will only apply to the current inspection.

To remove a service or fee from the list, click one to select the line item to be removed, and then click the “Remove Fee” button to remove the item.

Contract Tab

Click on the “Contract” tab to view detailed information about the contract to be associated with the current inspection.

Inspection Detail – Contract Tab



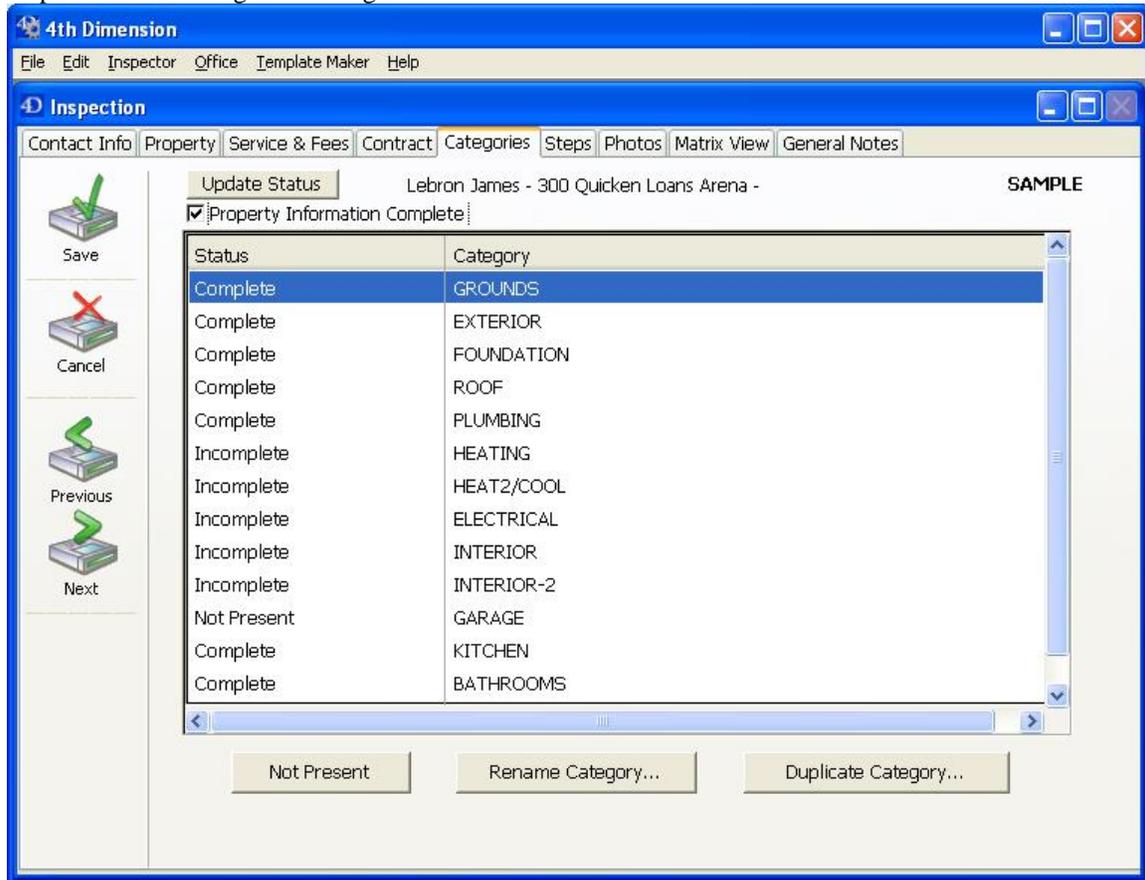
NOTE: A pick list will appear providing various contract options. Select the desired contract and click “OK” to use it for the current inspection.

The “Inspection Definition of Terms” is displayed toward the bottom of the screen. This information is “hard coded” for the Matrix report and cannot be altered.

Categories Tab

Click on the “Categories” tab to view a list of categories that will be part of the current inspection.

Inspection Detail Diagram – Categories Tab



NOTE: The items that appear in this list are based on the “inspection type” that was selected on the “General Info” tab of the inspection detail screen.

“Not Present” Button – To exclude a category from your report, first click on the category to select it, and then click the “Not Present” button.

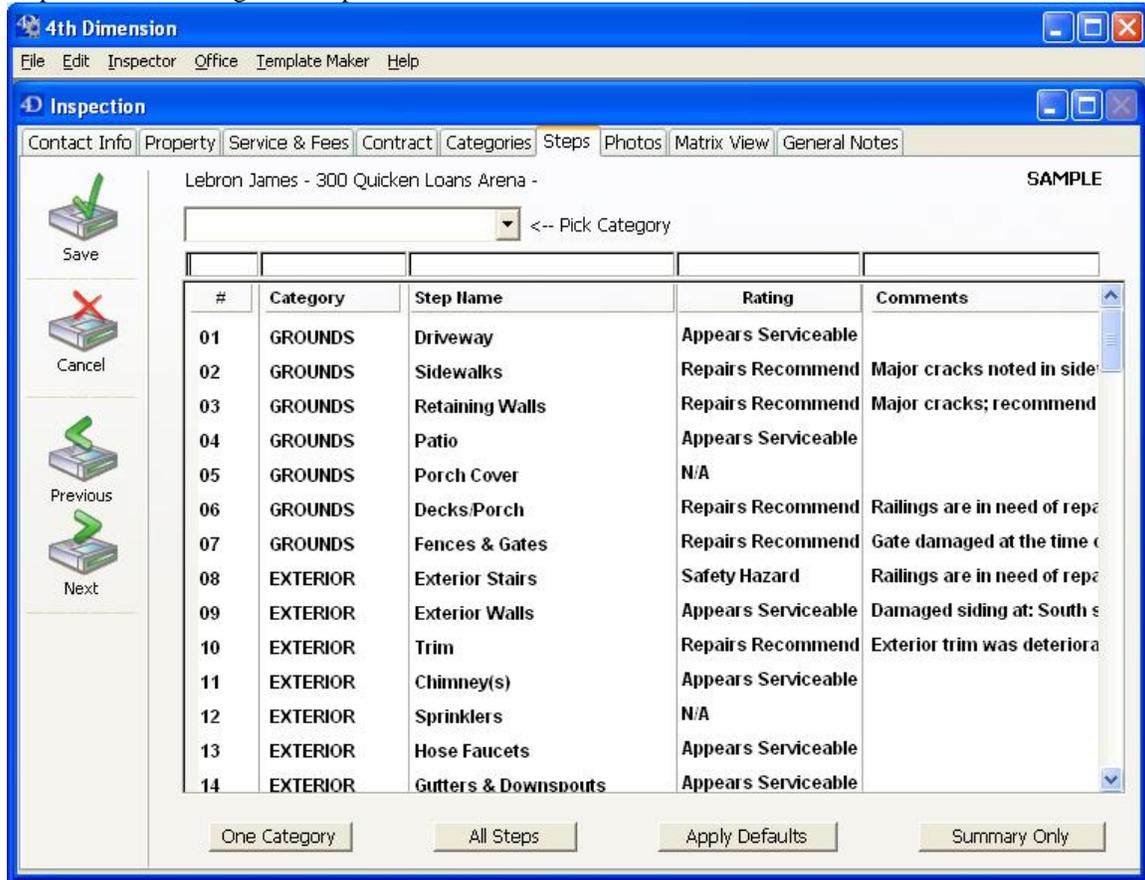
“Rename Category” Button – To change the name of a category for the current inspection, click on the category to select it, and then click the “Rename Category” button. Edit the name as desired and click “OK” to save the change.

“Duplicate Category” Button – To duplicate a category, click on a category to select it, and then click the “Duplicate Category” button. This will duplicate the category along with all of its steps, check list items, and comments.

Steps Tab

Click on the “Steps” tab to view a list of steps that make up the inspection independent of their respective categories.

Inspection Detail Diagram– Steps Tab



NOTE: You can filter the list of steps by typing in the box above a particular column heading. As you type above a column heading the list of steps will be reduced to items containing the characters that you type. Backspace characters one-at-a-time to change the filter.

“One Category” Button – Click this button to reduce the selection to steps matching the category located in the category pick list.

“All Steps” Button – Click this button to clear all column filters and show all steps for the current inspection.

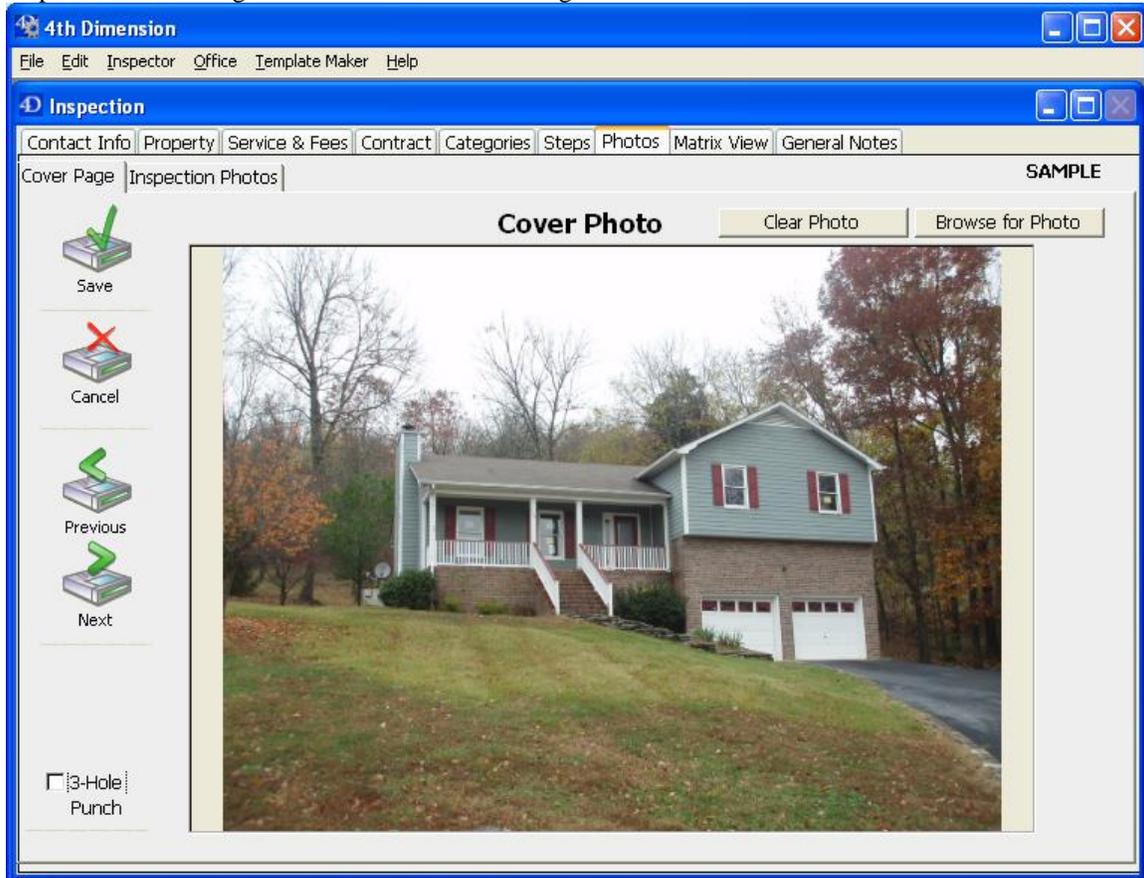
“Apply Defaults” – WARNING: This operation cannot be undone. Click the “Apply Defaults” to automatically set the ratings for all steps in the list.

“Summary Only” – Click this button to filter the list to only items that will appear on the summary. Typically this is includes ratings for “Repairs” and “Safety Hazards”.

Photos Tab – Cover Page

Click on the “Photos” tab to view and manage photos to be included with the current inspection.

Inspection Detail Diagram – Photos Tab – Cover Page Sub-Tab



From the main “Photos” tab there are two sub-tabs: “Cover Page” and “Inspection Photos”.

“Clear Photo” Button – Click this button to remove the current photo from the cover page of the current inspection.

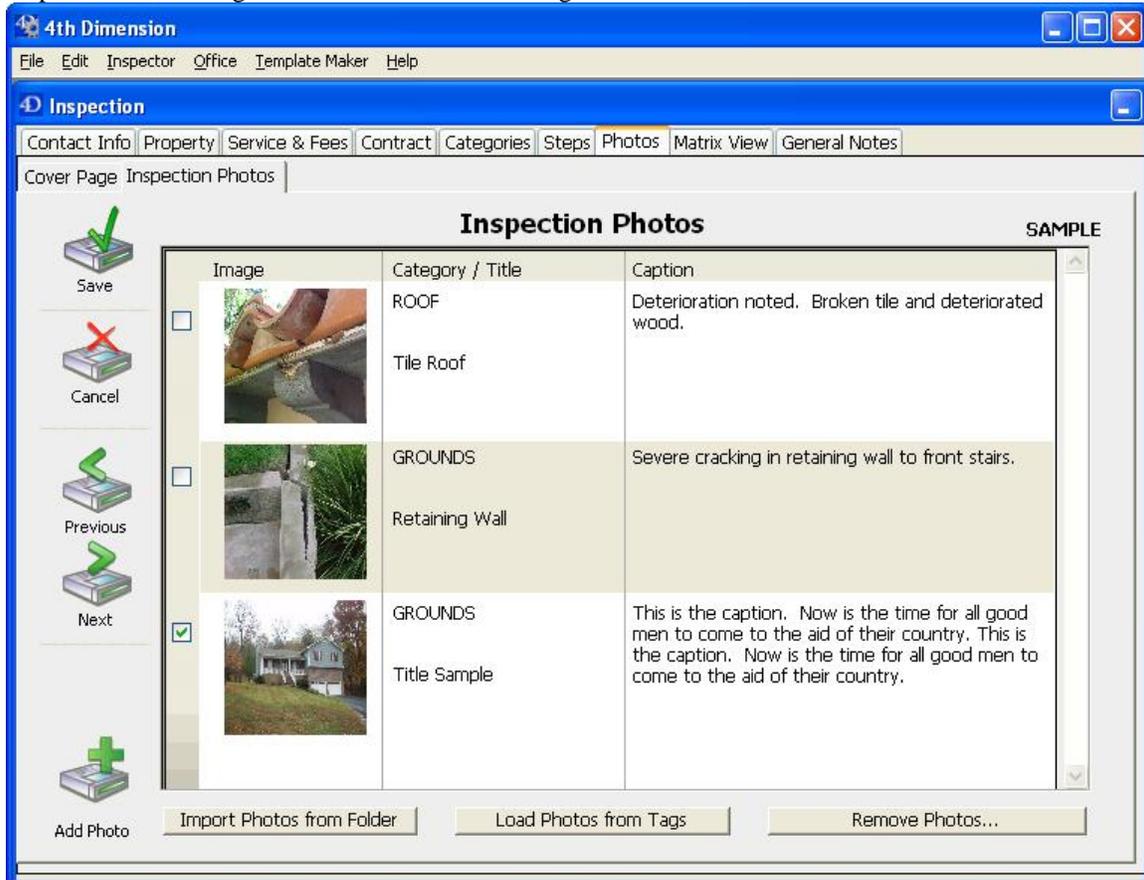
“Browse for Photo” – Click this button to choose a cover photo from a location on your PC. An “Open” dialog box will appear. Navigate to your cover photo and double-click on it to insert it into the report.

Click on the “Inspection Photos” tab to view and manage photos for the inspection detail.

Photos Tab – Inspection Photos

Click on the “Photos” tab to view and manage photos to be included with the current inspection. Click the “Inspection Photos” sub-tab to manage detail photos.

Inspection Detail Diagram – Photos Tab – Cover Page Sub-Tab



There are three methods of entering photos into the current inspection. The simplest method is to click the “Add Photo” icon lower left to bring up the Photo Detail screen. From there, click the “Browse for Photo” button and select the photo to import. Click the “Save” icon to return the list of photos.

“Import Photos from Folder” – This button brings up a dialog for you to select the folder in which your inspection photos reside on you PC. All pictures in the selected folder will be imported into the inspection. Double-click a photo in the list to bring up the Photo Detail screen and edit the “Category”, “Title”, and “Caption” as desired.

“Load Photos from Tags” Button – This button has been included to support previous version of the software. If you have embedded photo tags within your inspection, this allows you to import photos from a folder and automatically identify them with the tagged category and step. (This method is not recommended for the novice user.)

Matrix View Tab

Click on the “Matrix View” tab to view the inspection categories and steps approximately as they will appear in the Matrix output.

Inspection Detail Diagram – Matrix View Tab

The screenshot displays the '4th Dimension' software interface. The main window is titled 'Inspection' and shows the 'Matrix View' tab selected. The 'GROUNDS' section is active, showing a checklist of items with checkboxes for various inspection criteria. The items listed are:

- 01 Driveway**: Includes checkboxes for 'Material: «matl drive»', 'Not fully visible', 'Not functional (2)', 'Near end of lifespan (2)', 'Deterioration / Damage (2)', 'Surface settled *', 'Surface raised *', 'Trip hazards (5)', 'Major cracks *', 'Common cracks *', 'Evidence of poor drainage *', 'Maintenance / sealant needed *', and 'Eroded asphalt *'. A dropdown menu is set to 'Appears Servic...' and an 'Expand' button is present.
- 02 Sidewalks**: Includes checkboxes for 'Not functional (2)', 'Near end of lifespan (2)', 'Deterioration / Damage (2)', 'Poor drainage / improper slope', 'Surface settled *', 'Surface raised *', 'Trip hazards (5)', 'Major cracks *', and 'Common cracks *'. A dropdown menu is set to 'Repairs Recom...' and an 'Expand' button is present. A note below reads: 'Major cracks noted in sidewalk; warrant further attention or repair. (2) Surface drain covers damaged; underground piping not inspected. Deterioration noted at the sidewalk at the time of the inspection. (2)'
- 03 Retaining Walls**: Includes checkboxes for 'Moisture penetration *', 'Major cracks (1)', 'Common cracks *', 'Location(s): Front', 'Material: Concrete', 'Not fully visible *', 'Not functional', 'Near end of lifespan', and 'Deterioration / damage'. A dropdown menu is set to 'Repairs Recom...' and an 'Expand' button is present. A note below reads: 'Major cracks; recommend evaluation by a structural/geotechnical engineer and repairs as needed. (1) (2)'
- 04 Patio**: Includes checkboxes for 'Surface settled *', 'Surface raised *', 'Trip hazards (5)', 'Major cracks (1)', 'Common cracks *', 'Material: Flagstone', 'Location(s): Front', 'Not fully visible *', 'Not functional (2)', 'Near end of lifespan (2)', 'Deterioration / Damage (2)', and 'Evidence of poor drainage *'. A dropdown menu is set to 'Appears Servic...' and an 'Expand' button is present.

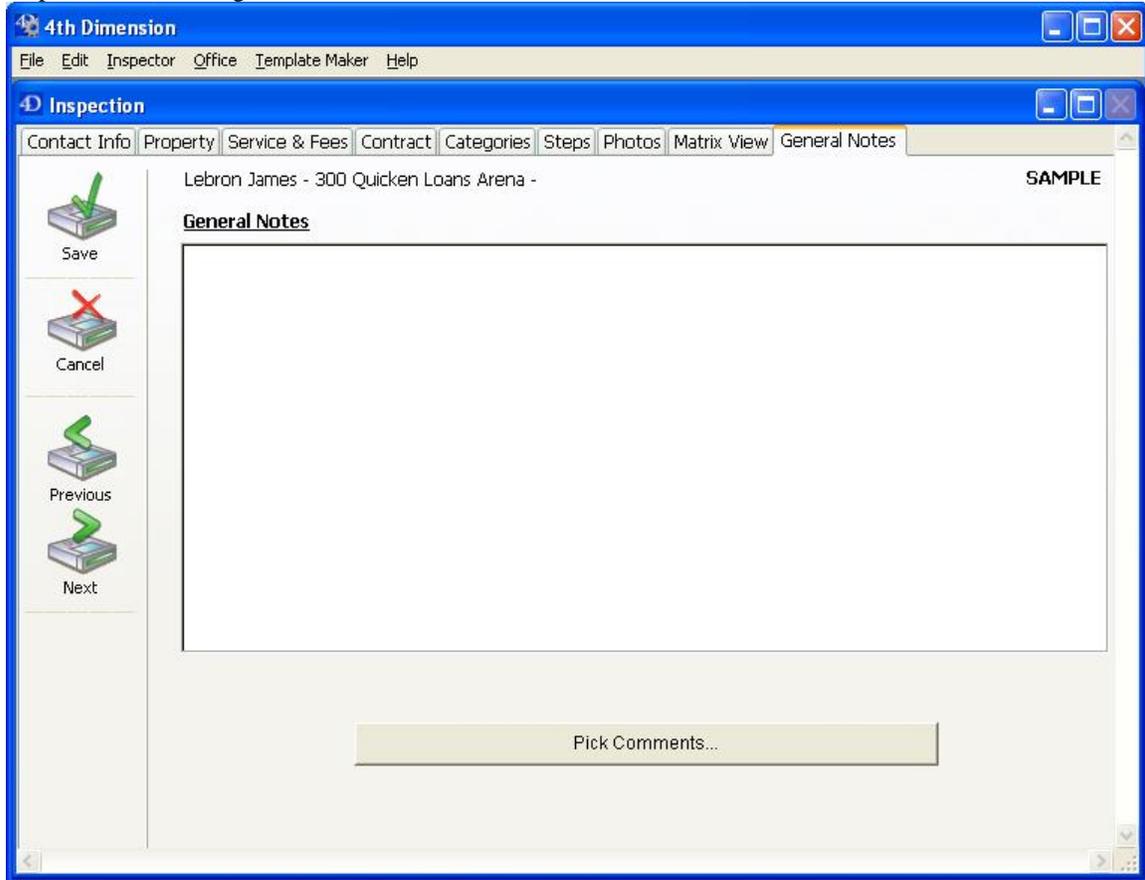
NOTE: The “Matrix View” was not designed as the main method for entering the detailed inspection data. It was designed to give users familiar with the original “Matrix” checklist forms a similar view of the inspection data.

Comments can be edited from this view for your convenience.

General Notes Tab

Click on the “General Notes” tab to view and edit the general notes for the inspection.

Inspection Detail Diagram – General Notes Tab



NOTE: The “General Notes” entered on this page have their own section in the Matrix report. To include the “General Notes” section in the Matrix output you must “check” the “General Notes” section in the print to PDF dialog.

Category Detail / Step List

From the “Categories” Tab, double-click on a category item to view the “Category Detail” screen and a list of steps that belong to that category.

Inspection Detail Diagram – Category Detail Screen – “Steps” Tab

4th Dimension

File Edit Inspector Office Template Maker Help

Inspection

Steps Category Comment

EXTERIOR

Property Location

Inspection Date 09/30/07 Address 300 Quicken Loans Arena
Client Name James City/State/Zip Cleveland, OH 44011

#	Category	Step Name	Rating	Comments
08	EXTERIOR	Exterior Stairs	Safety Hazard	Railings are in need of rep
09	EXTERIOR	Exterior Walls	Appears Serviceable	Damaged siding at: South
10	EXTERIOR	Trim	Repairs Recommend	Exterior trim was deterior
11	EXTERIOR	Chimney(s)	Appears Serviceable	
12	EXTERIOR	Sprinklers	N/A	
13	EXTERIOR	Hose Faucets	Appears Serviceable	
14	EXTERIOR	Gutters & Downspouts	Appears Serviceable	

Save

Cancel

Previous

Next

Delete Category

Rename Step Duplicate Step Apply Defaults Delete Step

Double-click on a “Step” item to view and edit the “Step” detail.

“Rename Step” Button – Click on a “Step” to select it, and then click this button to bring up a dialog that allows the step to be renamed.

“Duplicate Step” Button – Click on a “Step” to select it, and then click this button to create a duplicate of the step along with its step items, rating, and comments.

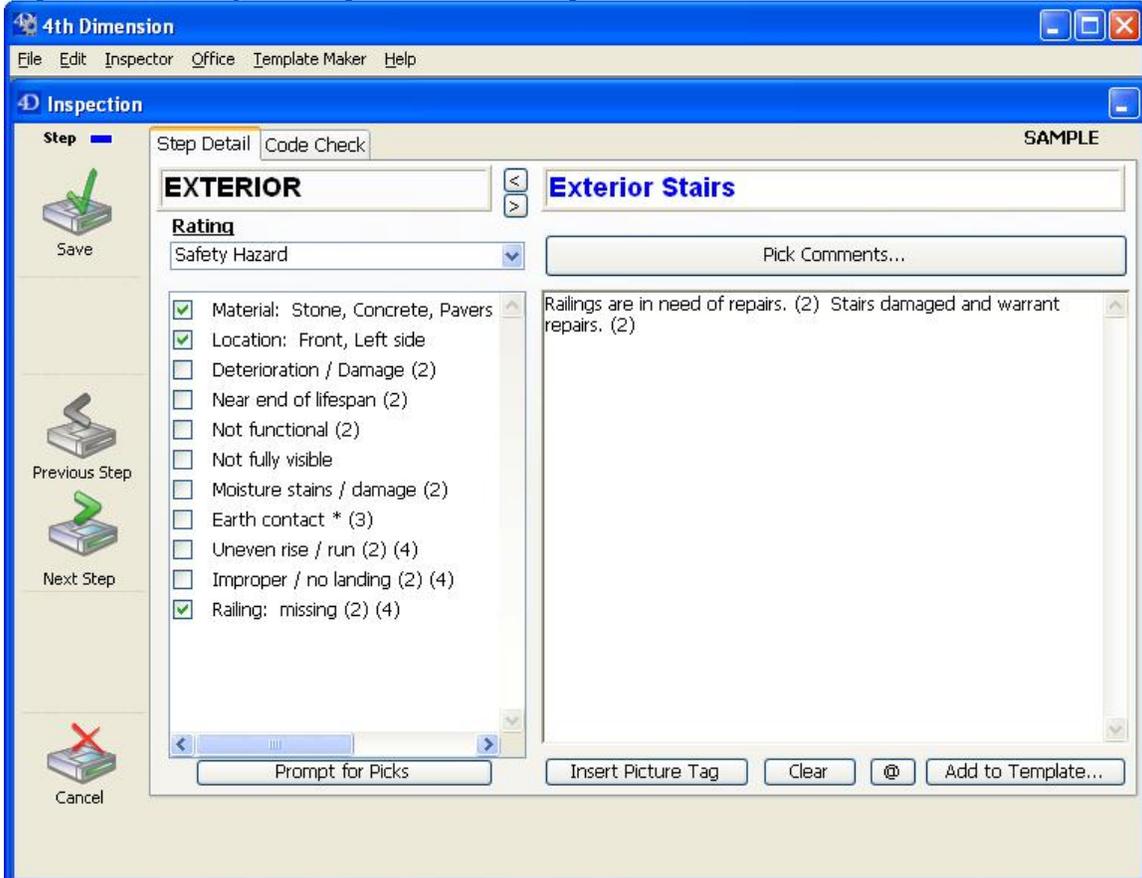
“Apply Defaults” Button – Click this button to apply the default ratings to the listed steps. (Note – Steps that have already been rated will retain their ratings.)

“Delete Step” Button – Click this button to remove a step from the inspection. **WARNING!** This cannot be undone. Use this button with caution.

Step Detail

Double-click a “Step” to view and enter data for that step. This is the “heart and soul” of inspection data collection.

Inspection Detail Diagram – Step Detail Screen – Step Detail Tab



The “Step Detail” screen is the main area for entering inspection information. There are three basic types of information for each step: Rating, Check List Items, and Comments.

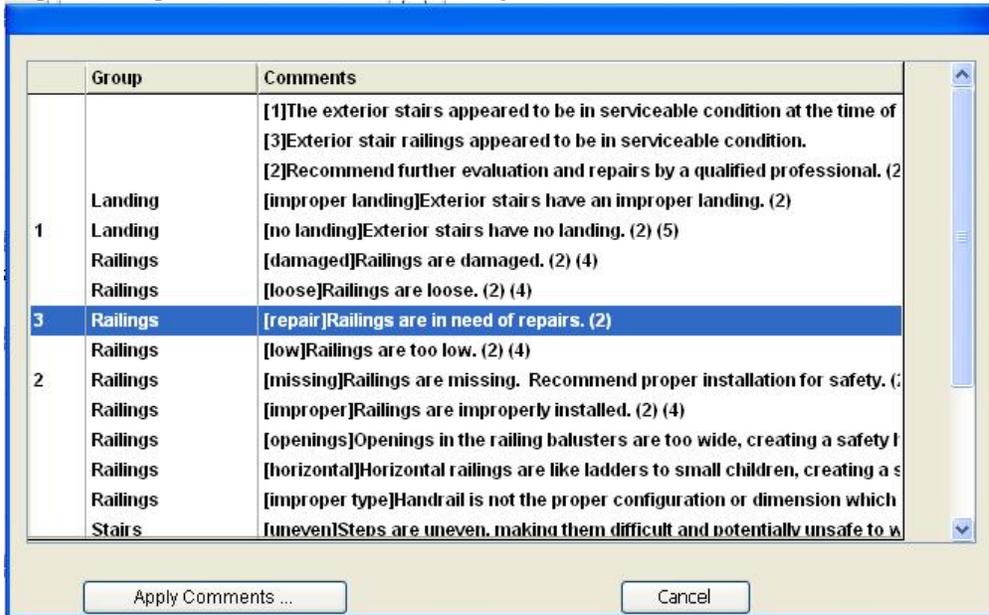
“Rating” Drop-down – Click the “Rating” drop-down and select an appropriate rating. (Note – the selected rating determines whether the comments appear on the summary report or not. Typically ratings of “Repairs Recommend” and “Safety Hazard” will force the comments to appear on the summary report. CHECK LIST ITEMS DO NOT APPEAR ON THE SUMMARY REPORT REGARDLESS OF THE SELECTED RATING.)

“Pick Comments” Button – Click this button to view a list of common comments that are associated with the step.

Comment Pick List

Click on comments in the order that you wish them to be included in the step comment area.

Inspection Step Detail Comment Pick List Diagram



As comments are selected, a sequence number will appear next to each comment indicating the order in which the comments will be added to the step comment field. To remove a comment from the sequence, just click on the comment a second time.

Click the “Apply Comments” button to insert the comments. Click “Cancel” to return to the “Step Detail” screen without inserting any comments.

NOTE - Some comments have built-in pick lists. You will automatically be prompted for pick lists, if appropriate, after you click the “Apply Comments” button.

Template Maker

Template Maker Overview

Items in the Template Maker Menu give the ability to customize the “boilerplate” content used when creating an inspection report. Template Maker is a powerful part of the application that allows the user to modify almost every aspect of the inspection report. This section assumes that the user has reviewed how to create an inspection using the items from the Inspector Menu.

With InspectNOW you have been provided a very powerful residential property inspection template. This template is at the very core of the data collection and report generation process. Its design determines everything from the major categories in the report, e.g. Grounds, Electrical, Kitchen, etc., to the comments available in the customizable comment library. Template Maker is the tool for modifying both data collection and report generation.

How Template Maker Works

Template Maker is part of the software program that gives the user the ability to customize various aspects of InspectNOW, by modifying the data file used to create a new inspection.. Through Template Maker the user can add, change, or delete categories, steps, ratings, material checklists, and comment pick lists on the InspectNOW data file. Data created or modified with Template Maker controls the entry screens that are available in InspectNOW. Modifications to the InspectNOW data file are automatically applied and available immediately within new inspections. For reasons of data integrity, pre-existing inspections will not be affected by changes made in Template Maker.

Inspection Information

Inspection Type	Property Inspection	<u>Start Time</u>	<u>Prior Confirmation</u> <input type="radio"/> Buyer's Agent <input checked="" type="radio"/> Seller's Agent <input type="radio"/> Client
Date	09/30/07	9:45 AM	
Inspector	Clouseau	<u>Company ID</u>	
Ordered By	Dreyfus	1	
Referred By	Kato		

Special Instructions
There are no special instructions for this report.

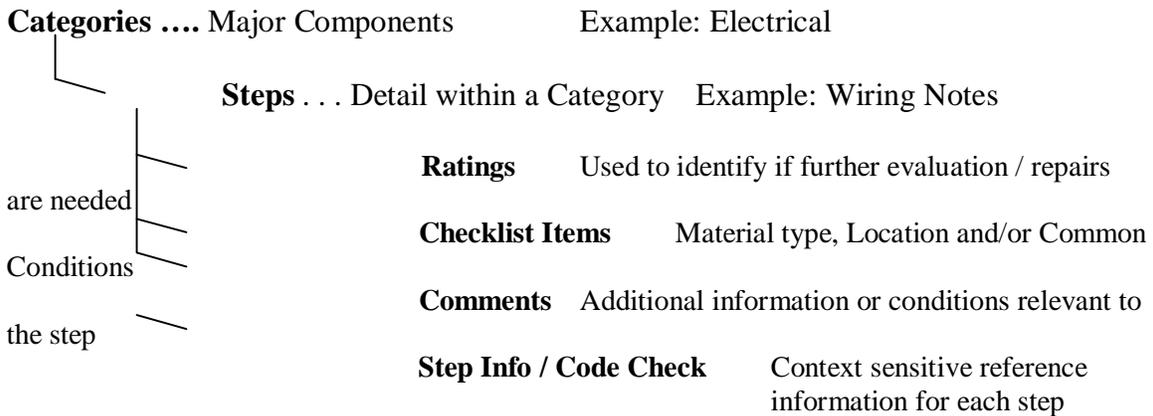
Data Concepts - It is critical to note that the INSPECTION TYPE field forms the link between the templates maintained in Template Maker and the categories, steps, and pick lists found in Inspector. INSPECTION TYPES found in Template Maker will appear as pick list items for the INSPECTION TYPE field found in the “Inspection Information” section of the Inspection Entry screen. The categories that appear in the “Category Tab”

will correspond to those maintained in Template Maker for the corresponding INSPECTION TYPE.

Using Template Maker

Template Maker features are accessed through the “Template Maker” Menu within your InspectNOW 2.0 application.

The TemplateMaker data is organized in the following hierarchy: At the very top is the overall template itself, such as “Property Inspection”. Within each Template is a series of Categories. Within each Category is a series of Steps. Associated with each Step is a series of Materials or checkbox/checklist items. Each Step also has associated Ratings, Comments, and Step Info. (Note: Step Info is where the ITA CodeCheck information can be found.)

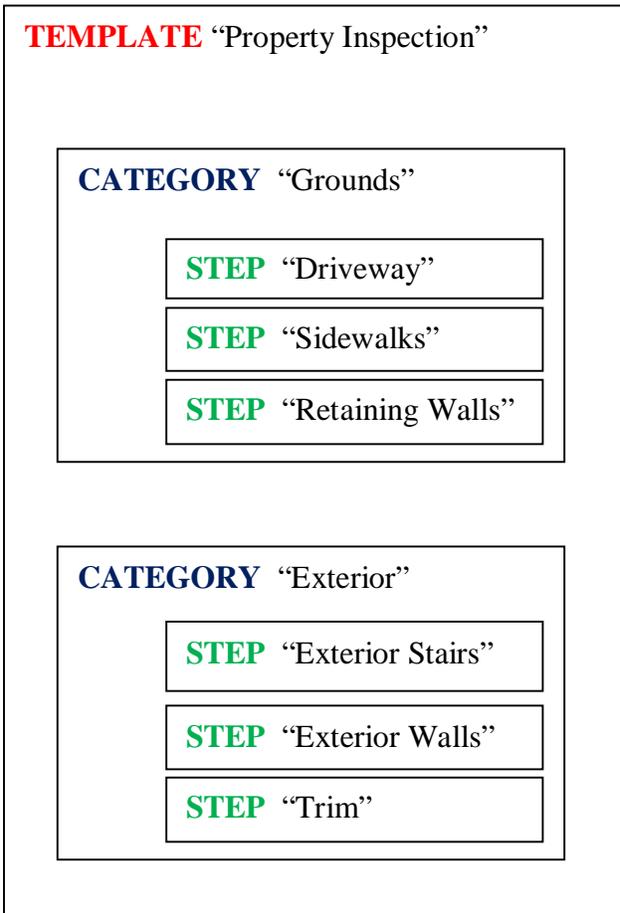


The following section in this user’s guide will explain how to add, edit, or delete elements at each level.

Template Data Structure

For a better understanding of how the template data is organized, please refer to the following diagram.

Template Data Structure Diagram



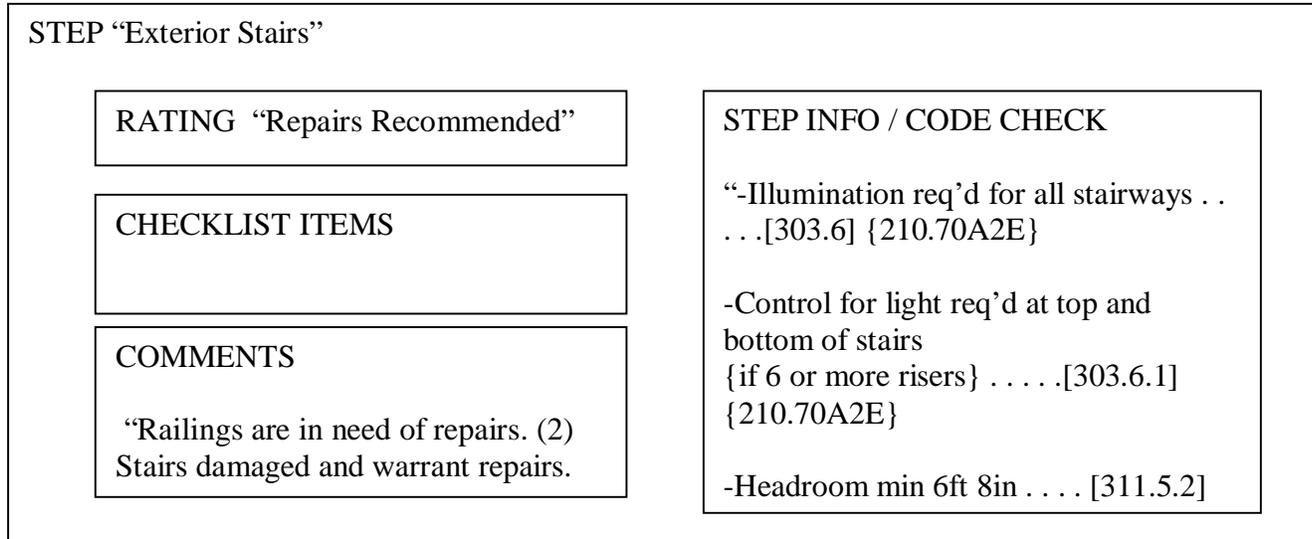
The diagram to the right illustrates the organization of the Template Data.

At the top of the hierarchy is the name of the actual **Template**. In this example the name of the template is “Property Inspection”. When creating a new inspection using INSPECTOR the *Inspection Type* field indicates which template will be used to define the content of the inspection.

Template Maker is used to define the links between various **Categories** inspection **Templates**. Template Maker is also used to define the links between **Categories** and **Steps**.

- 1) A category can be linked to one or more templates.
- 2) A step can be linked to one or more categories.

In addition, categories and steps can exist independent of links to anything else and can be accessed directly without going through the hierarchy of a particular template. In past iterations of the product this was not possible.



The diagram above illustrates the organization of data within any given step.

There are basically four areas of content that can be part of every step:

- 1) **RATING** – When a rating type has been determined for a step, it will appear as a drop-down menu where the user can select one and only one choice from the list. In a residential property inspection template the “Standard” rating type includes item choices like “Serviceable”, “Repairs Recommended”, “Hazardous”, and “N/A”.

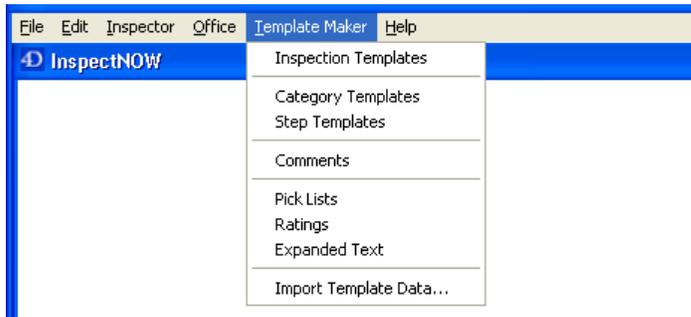
If the “Standard” rating type is edited in Template Maker, all steps using that type will inherit the changes. In addition to changing existing rating types, new rating types can be created and used for any given step.

- 2) **CHECKLIST ITEMS** - (Previously called the “Materials List”) Checklist items appear as a scrollable list of checkboxes where the user can “Check all that apply”. We recommend using this area for collecting the quantitative information about an inspection like materials, amperage, size, and other descriptive elements of an inspection not necessarily associated with the qualitative elements of the inspection. **ONLY RATINGS AND COMMENTS APPEAR ON THE SUMMARY REPORT. CHECKLIST ITEMS DO NOT APPEAR ON THE SUMMARY.**
- 3) **COMMENTS** – Within every step template there is a section that determines which comments will appear in the comment pick list for that step. Comments can be linked to one or more steps. Like Category Templates and Step Templates, individual comments do not have to be associated with any step and can be accessed directly through Template Maker.
- 4) **STEP INFO / CODE CHECK** – This section of a Step Template is where information is stored for the Inspectors reference for any give step. With the InspectNOW Template it is the place for all context sensitive Code Check information. The user can modify and enhance this information for any give step using Template Maker.

Template Maker Menu

Click on the “Template Maker” menu to display items related to modifying your inspection template.

Template Maker Menu Screen



Inspection Templates – This item displays a list of the inspection templates that will be available in the Inspection Type pick list when creating a new inspection. The system ships with an extensive residential property inspection template. InspectNOW ships with the Matrix Residential Inspection template compatible with the ITA Matrix binder.

Category Templates – Displays a list of all category templates. Double-click a category to view details or edit it.

Step Templates – Displays a list of all step templates. Double-click a step template to view details or edit it.

Comments – Displays a list of available comments. Double-click on a comment to view details or edit it.

Pick Lists – Displays a list of “Pick Lists” available to be embedded into comments or checklist items. Double-click a “Pick List” to view details or edit it.

Ratings – Displays a list of Rating Types that can be associated with a Step Template. Double-click a Rating Type to view details or edit it.

Expanded Text – Displays a list of “Expanded Text” items. Expanded Text allows you to create your own custom “short-hand” for common inspection phrases or terms. Expanded Text short-cuts are made available in Inspector when entering step comments.

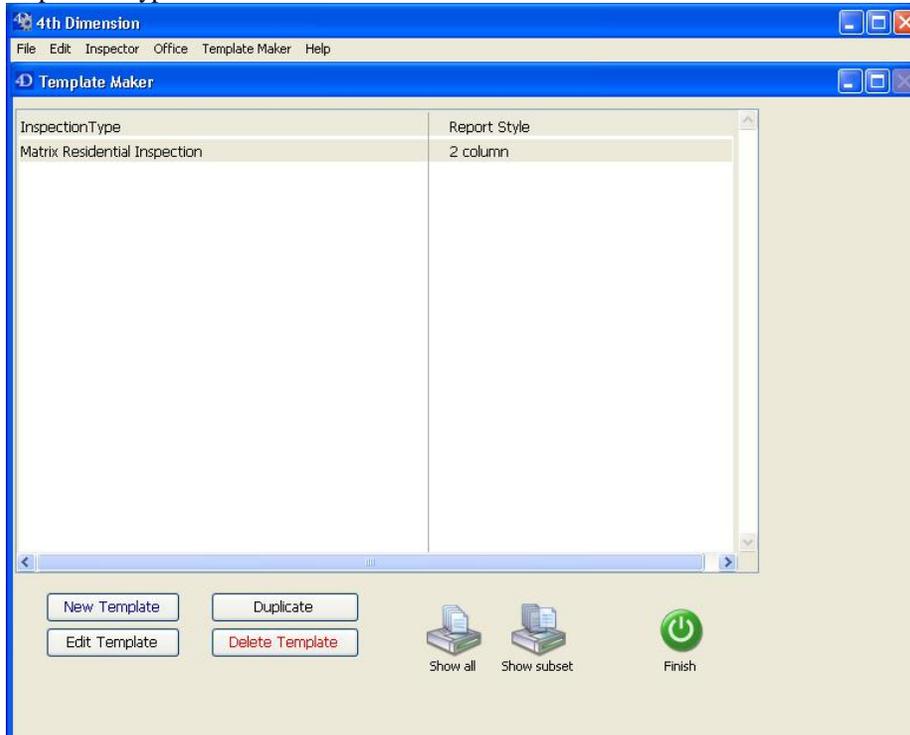
Import Template Data... - This is a utility that allows Borealis to provide updates to the Template Data file.

Bundled with your InspectNOW software is the “Matrix Inspection” template. This template includes all of the standard categories, steps, materials, boilerplate comments, and Code Check information associated with the ITA Kaplan “Matrix” style report.

Inspection Templates Menu

Click on the “Inspection Templates” menu to view a list of inspection types.

Inspection Type List Screen

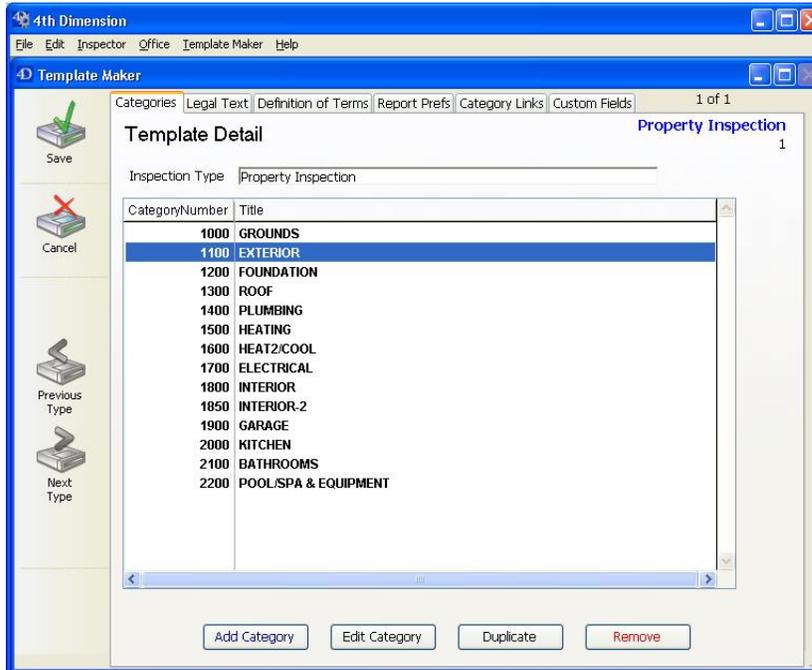


To access the template details, double-click on “Matrix Inspection” in the list. The Template Detail screen will display the “Categories” linked to the Matrix template.

Template Detail Screen

Double-click on a template type to view the template detail screen.

Template Detail Screen



The tabs across the top will allow you to navigate to and edit the various attributes of the template.

The "Inspection Type" field is name of the current template. This name appears in the "Inspection Type" pick list on the "Contact Info" tab of the inspection detail screen when editing or creating an inspection.

Notice the list of categories. These are the Categories associated with the current Template and Inspection Type. Use the buttons at the bottom to add, edit, duplicate or remove Categories from the current template.

To add a new Category to the current Inspection Type just tap the "Add Category" button and a new Category Editor screen will come up where you will add the Step components.

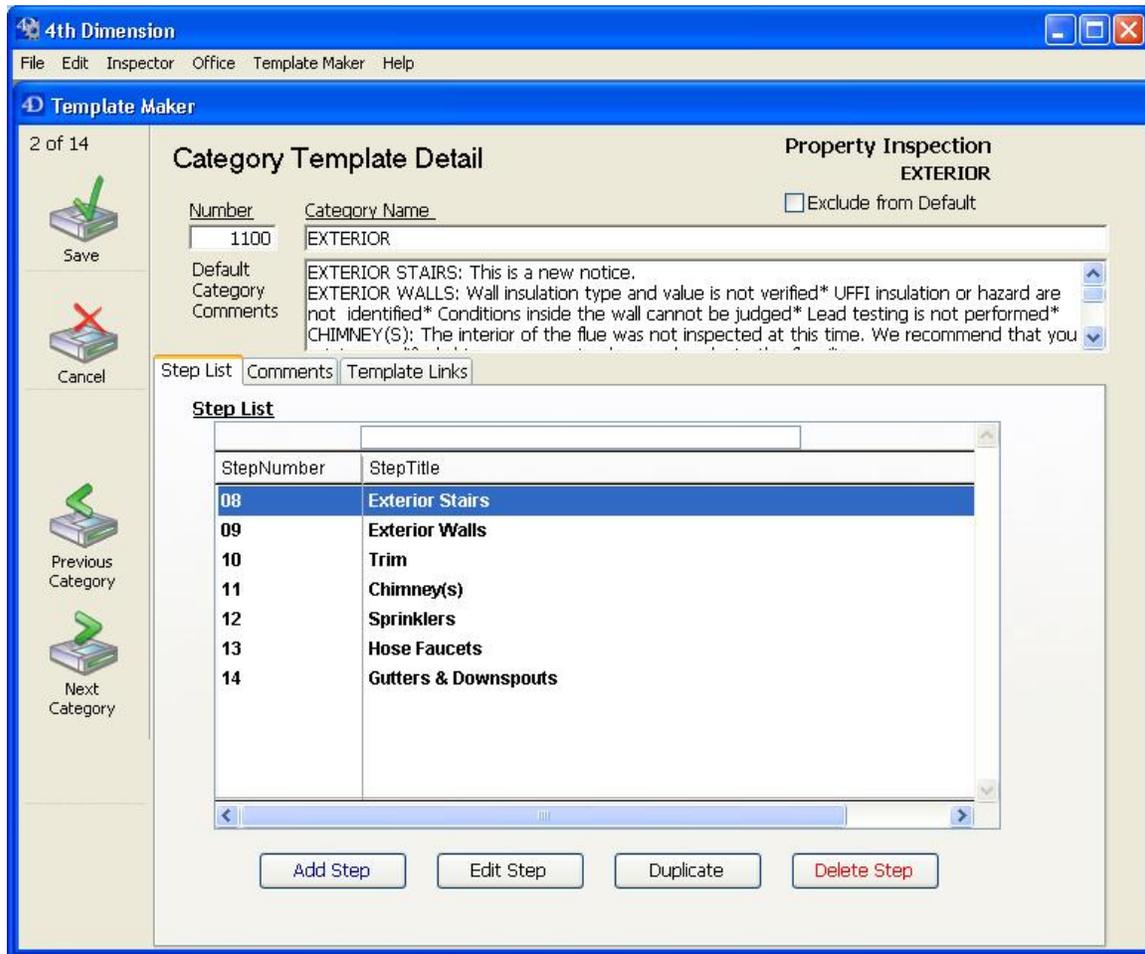
To remove a Category from the current Inspection Type select the Category you want to remove and tap the "Remove" button.

The "Save" button is used to save changes and return to the previous Template Editor screen.

Category Template Detail

Click on the “Comments” tab to view or edit the general comments associated with the current Inspection Type Template. To return to the category list, simply click on the “Categories” tab.

Category Template Detail – Comments Tab



There are several fields that relate to the current Category.

The “Category Number” is used to determine the order in which this category will appear in the category list. Change this number to change the order of the categories.

The “Category Name” is simply that; the name of the current category. This is an enterable field.

The “Category Description” is a place for you to provide a more detailed description of the current category. This is for reference purposes only and does not appear in the InspectNOW application anywhere.

Notice on the right there is a list of Steps/Components. These are the Steps associated with the current Category. Use the buttons at the bottom to add, edit, duplicate or delete Steps.

To add a new Step to the current Category from scratch just tap the "Add" button and a new Step Editor screen will come up where you will add Materials and Comments for the new Step.

To delete a Step from the current Category select the Step you want to delete and tap the "Delete" button.

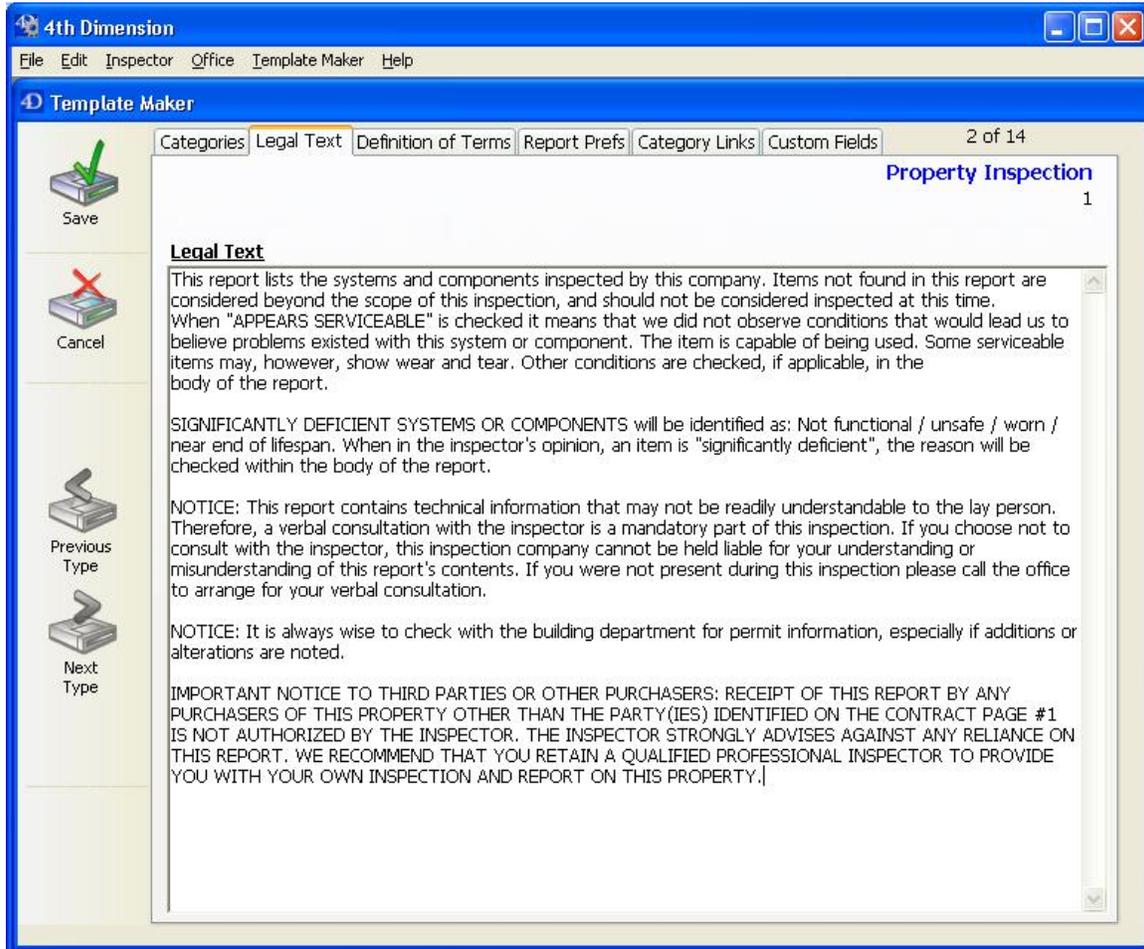
The "OK" button is used to return to the previous parent Category Editor screen.

Click on the "Comments" tab to view or edit the category comment associated with the current category. To return to the Step list click on the "Steps" tab.

Legal Text Tab

Click on the “Legal Text” tab to view the main disclaimer for the inspection report. This text is only used to generate the “Non-Matrix” report.

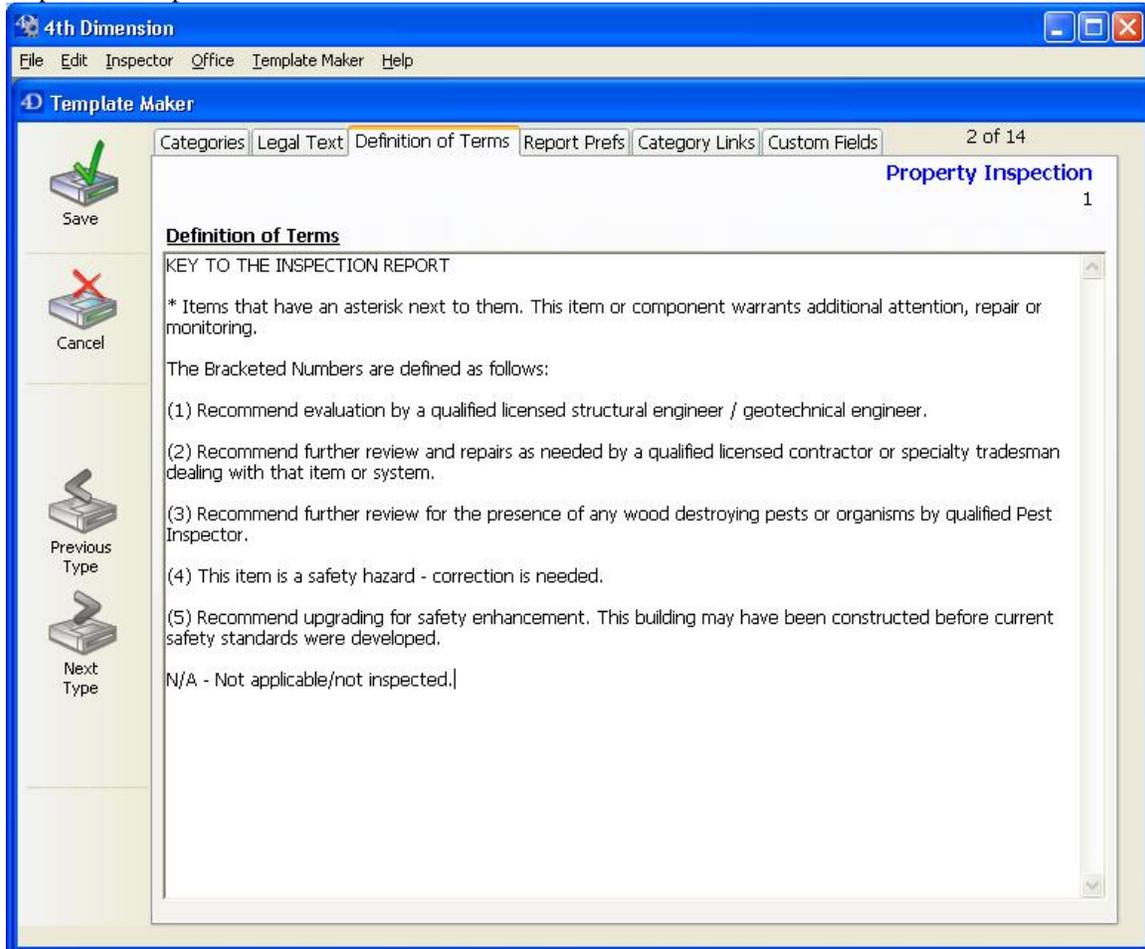
Inspection Template Detail – Legal Text Tab



Definition of Terms Tab

Click on the “Definition of Terms” tab to view or edit inspection terms. This text is only used to generate the “Non-Matrix” report.

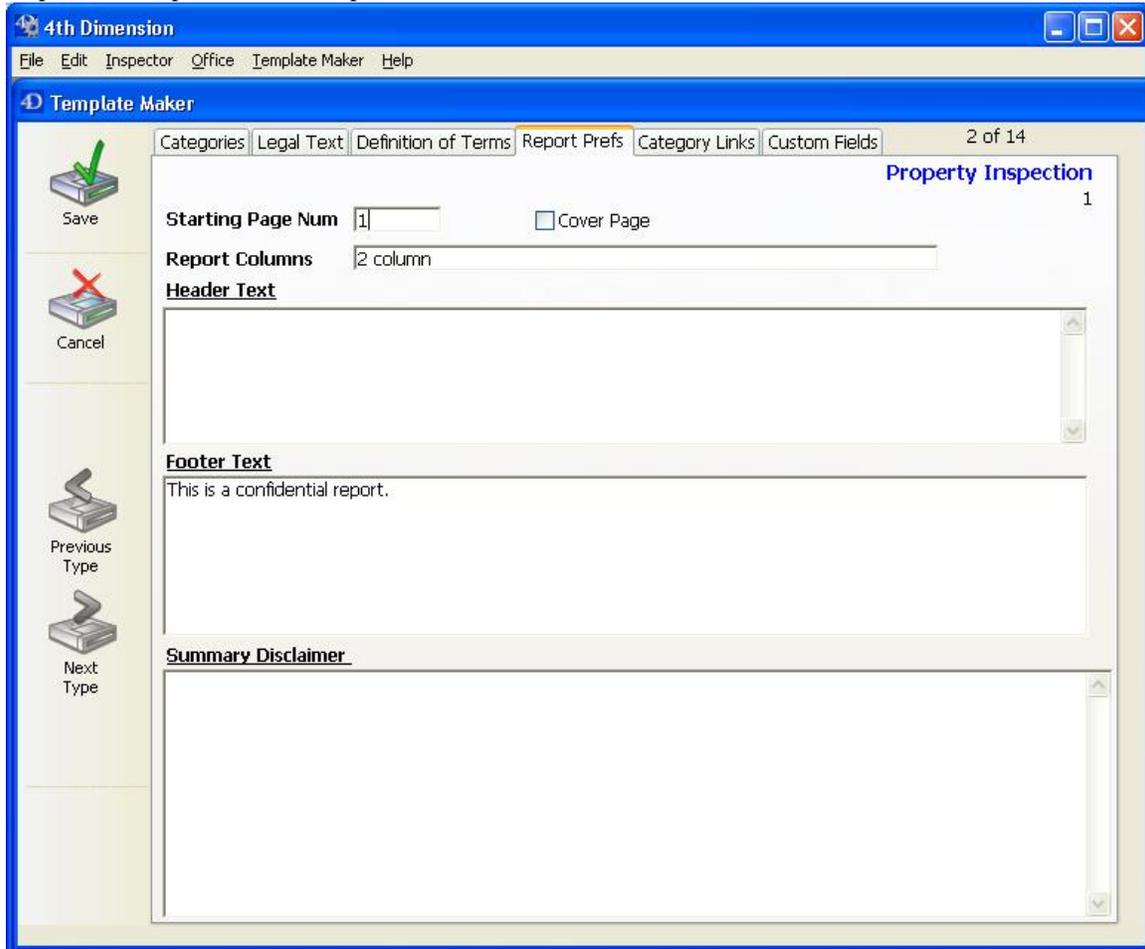
Inspection Template Detail – Definition of Terms Tab



Report Prefs Tab

Click on the “Report Prefs” tab to view and edit various report preferences. This text is only used to generate the “Non-Matrix” report.

Inspection Template Detail – Report Prefs Tab



The screenshot shows the '4th Dimension' software window with the 'Template Maker' interface. The 'Report Prefs' tab is selected, showing settings for a 'Property Inspection' report. The interface includes a sidebar with 'Save', 'Cancel', 'Previous Type', and 'Next Type' buttons. The main area contains fields for 'Starting Page Num' (1), 'Report Columns' (2 column), and 'Header Text'. The 'Footer Text' field contains the text 'This is a confidential report.' and the 'Summary Disclaimer' field is empty.

4th Dimension

File Edit Inspector Office Template Maker Help

Template Maker

Categories Legal Text Definition of Terms Report Prefs Category Links Custom Fields 2 of 14

Property Inspection 1

Starting Page Num 1 Cover Page

Report Columns 2 column

Header Text

Footer Text

This is a confidential report.

Summary Disclaimer

Save

Cancel

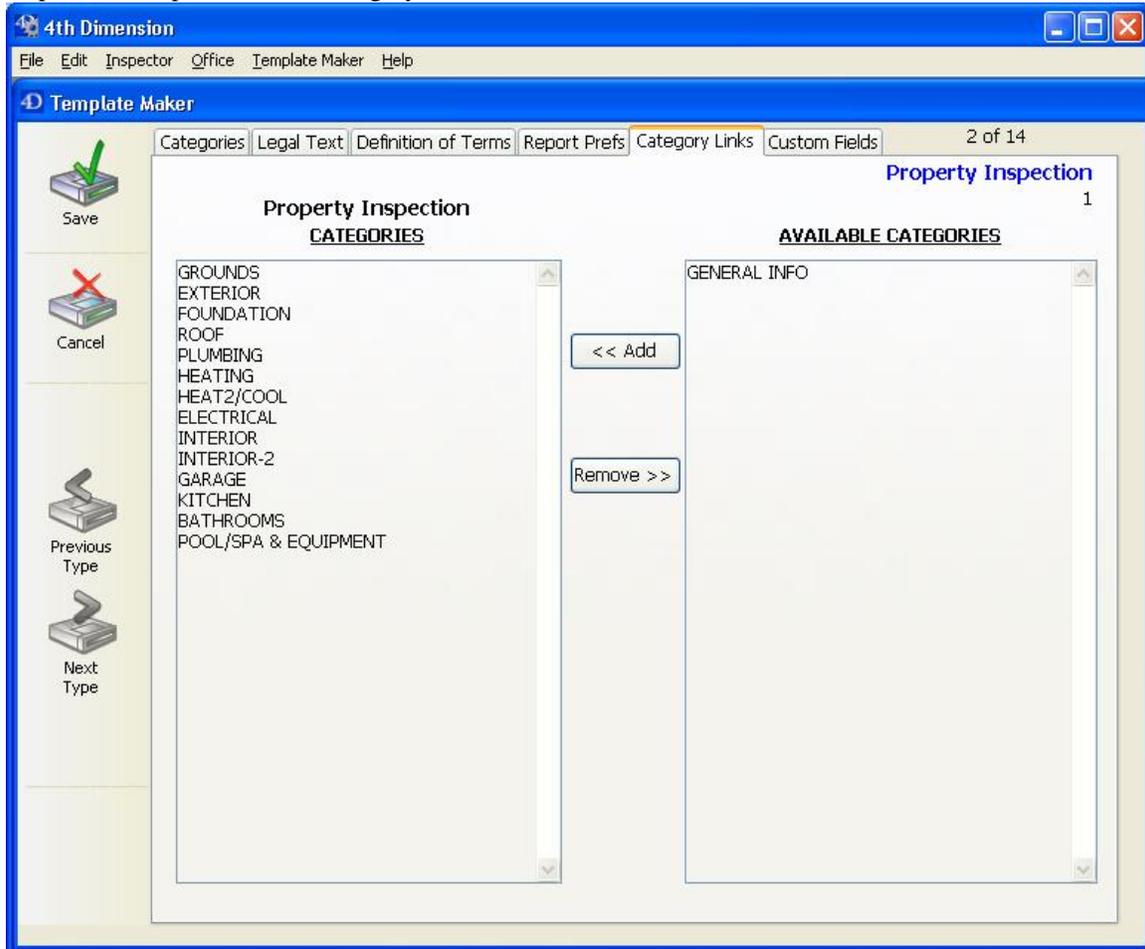
Previous Type

Next Type

Category Links Tab

Click on the “Category Links” tab manage which categories will be linked to the current inspection template.

Inspection Template Detail – Category Links Tab



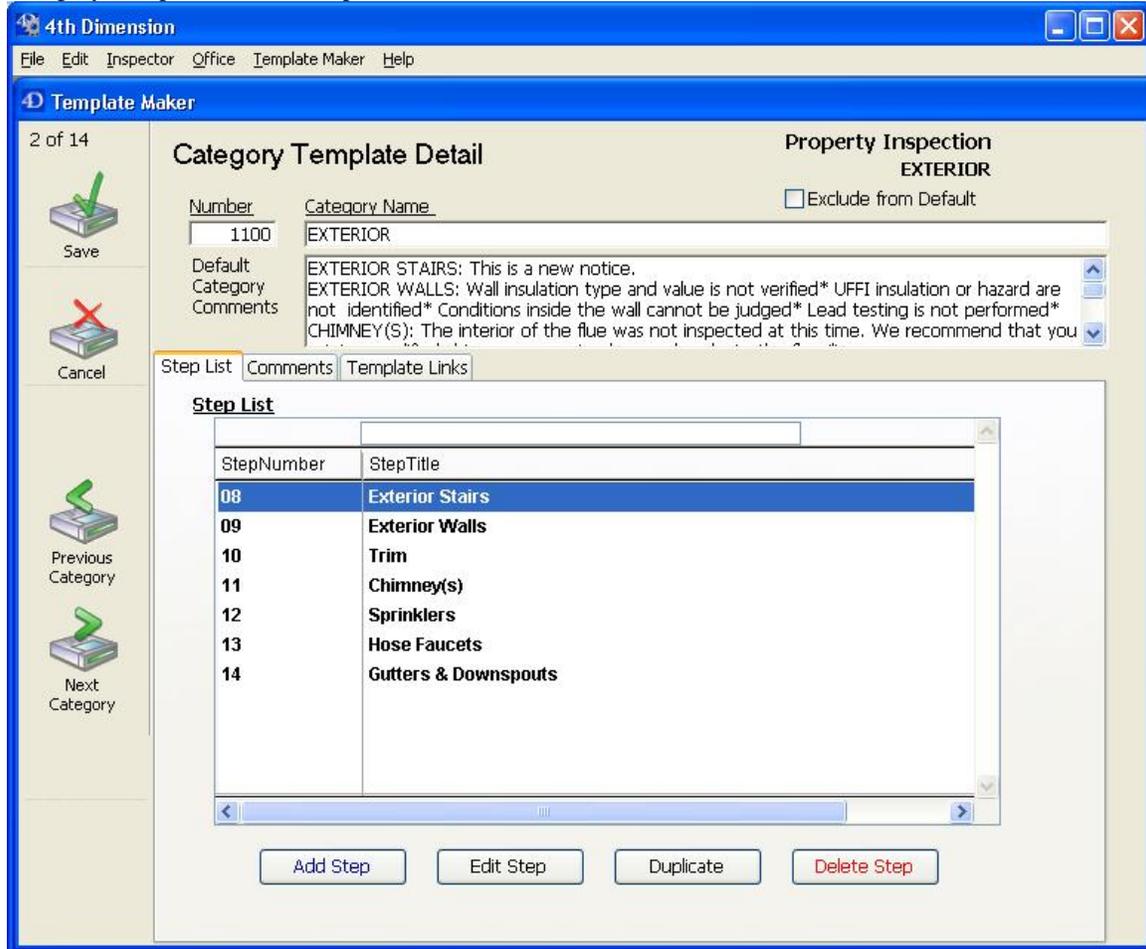
Link a Category to the Template: Select an available category from the right column and click the “Add” button.

Remove a Category from the Template: Select an available category from the left column and click the “Remove” button.

Category Template Detail

Click the “Categories” tab to return category list for the current template. Click on a category in the list to select it and click the “Edit” button to view the category template detail.

Category Template Detail – Step List Tab



Category Number – You can control the order in which categories appear in your system by changing the “Number” field for the category.

Category Name – Edit the category name as desired. (Note – It is not advised to change the names of predefined categories for the Matrix Inspection template when using the Matrix output.)

Default Category Comments – This is where the disclaimer, if any, for a particular category should go. (This applies to Non-Matrix output only.)

Step Template Detail

The Step Template Detail screen is where the six basic attributes of a step: step title, number, rating type, check list items, comments, and step info.

Step Template Detail – Check List Items Tab

The screenshot shows the 'Step Template Detail' window in the '4th Dimension' software. The window title is '4th Dimension' and the menu bar includes 'File', 'Edit', 'Inspector', 'Office', 'Template Maker', and 'Help'. The main area is titled 'Step Template Detail' and is part of the 'Property Inspection EXTERIOR' section, specifically for 'Exterior Stairs'. The window is divided into several sections:

- Left Sidebar:** Contains navigation buttons: 'Save' (green checkmark), 'Cancel' (red X), 'Previous Step' (up arrow), and 'Next Step' (down arrow).
- Form Fields:**
 - Step Title: Exterior Stairs
 - Step Number: 08
 - Rating Type: Standard (dropdown menu)
 - Keyword: (empty text box)
 - ID: 9
- Check List Items Tab:** A table with two columns: 'MaterialOrder' and 'Name'. The table contains the following items:

MaterialOrder	Name
10	Material: «matl stairs»
60	Location: «location extr»
66	Deterioration / Damage (2)
67	Near end of lifespan (2)
68	Not functional (2)
69	Not fully visible
70	Moisture stains / damage (2)
80	Earth contact ^ (3)
90	Uneven rise / run (2) (4)
100	Improper / no landing (2) (4)
110	Railing: «railing»
- Bottom Buttons:** 'Add Item', 'Edit Item', 'Duplicate', and 'Delete Item'.

The “Step Title” is the name of the current step. (Note – The step title does not determine the order in which steps are displayed in a list. Steps are sorted by step number.)

The “Step Number” is used to determine the order in which this step will appear in the step list when you are doing an inspection using InspectNOW Inspector. Change this number to change the order of the Steps. You can also mix numbers with letters. It is recommended that the Step numbers be incremented by 10s so it is easier to insert Steps between current existing Steps. You can also add a letter to the end of the Step number to insert a new Step between existing Steps.

(It is not recommended changing step numbers for the Matrix template because of the cross-references tied to the Matrix inspection binders.)

The “Rating Type” is a drop-down list that links the Step to an appropriate set of Rating Choices. This determines the choices that will appear in the rating drop-down list for a step in InspectNOW.

The “Step Keyword” is used to categorize Steps together in the "Major Systems" report. It can be any type of keyword. An example would be having all the Steps that are associated with electrical having a keyword "Electrical". When the “Major Systems” report is printed then all the Steps with the keyword "Electrical" will be printed together.

Step Template Detail Tabs

Check List Items Tab

The default tab is the "Check List Items" tab. (In earlier versions of the software this was called the "Materials" tab.) This tab displays a list of items that will appear as "checkbox" items associated with the current step. Use the buttons at the bottom to add, edit or delete items. With the Matrix style reports the "Check List Items" are those items that appear as checkboxes under each step.

Step Template Detail

To view or edit a "Check List Item" in the list, select it and click the "Edit" button on the bottom of the screen or double-click on the item and the Checkbox Item Detail screen will appear.

Step Template Detail – Check List Items Tab

The screenshot displays the 'Checkbox Item Detail' dialog box within the '4th Dimension' software. The window title is '4th Dimension' and the menu bar includes 'File', 'Edit', 'Inspector', 'Office', 'Template Maker', and 'Help'. The dialog title is 'Template Maker'. On the left side, there are five buttons: 'Save' (with a green checkmark icon), 'Cancel' (with a red X icon), 'First' (with a green arrow pointing up), 'Previous' (with a green arrow pointing left), 'Next' (with a green arrow pointing right), and 'Last' (with a green arrow pointing down). The main content area is titled 'Checkbox Item Detail' and is set for 'Property Inspection EXTERIOR Exterior Stairs'. It features a 'Name' text box containing 'Deterioration / Damage (2)', a dropdown menu labeled 'Insert Pick List in Comment', a 'Material Order' text box with '66', and two checkboxes: 'Default' and 'Comments'. Below these is an 'Automatic Comment' section with a text area containing the text 'Recommend further evaluation by a licensed technician.'

The “*Name*” field is where the text is entered that will appear next to the checkbox for the item. It is limited to 80 characters.

The “Order” field controls the order in which the items will appear.

The “*Automatic Comment*” field can contain a comment that would be automatically inserted into the comment column for the specific Step when you select the material. This is a very powerful feature that can save time in the field. An example could be a disclaimer that is inserted into the inspection report every time there is an EIFS type siding.

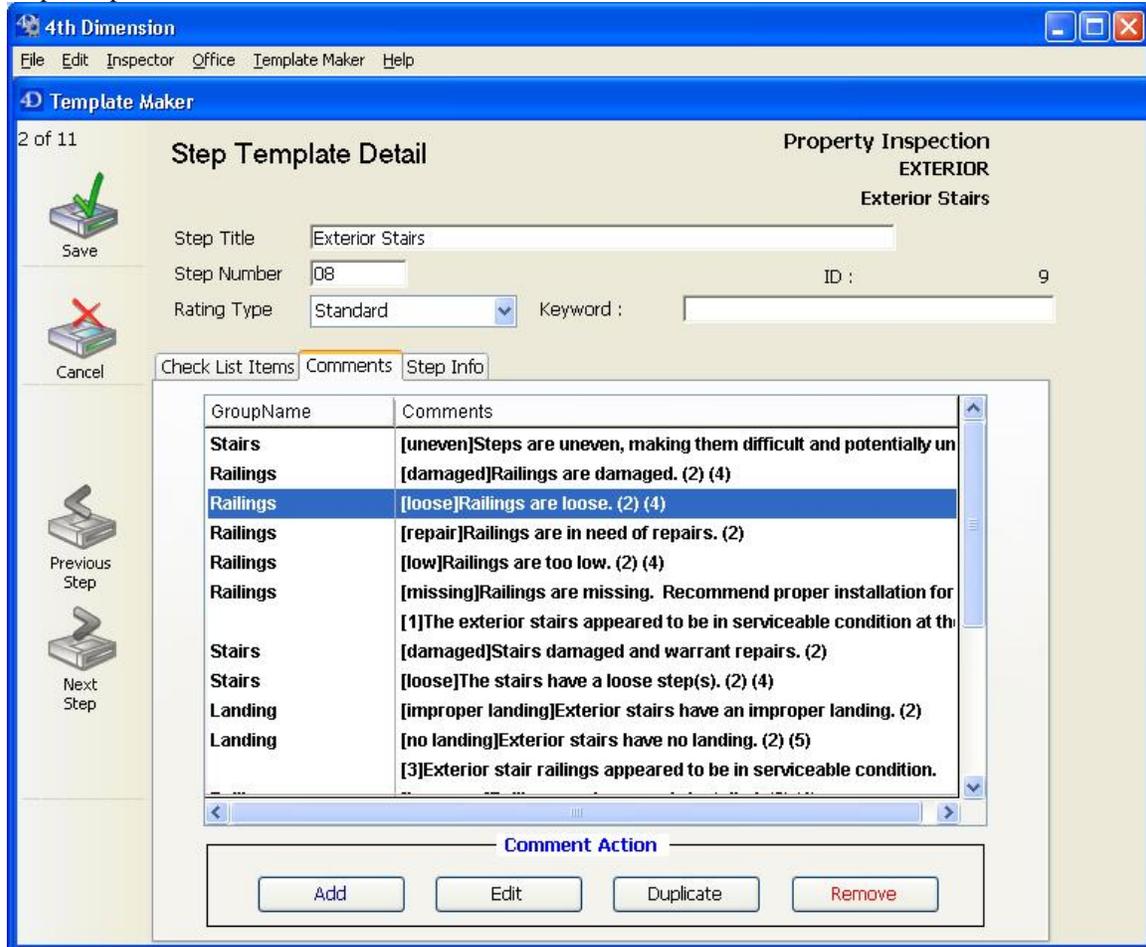
The “*Default*” checkbox is checked when the associated item is the most common material for the associated Step/Component. This item is automatically checked when the “Apply Defaults” button is tapped when doing an inspection. This can cut down on the inspection time out in the field.

(Caution: This is an advanced feature should be used cautiously since it can cause mistakes out in the field if not used carefully)

Step Comment Dialog

Click on the “Comments” tab to see the list of comments for the current step. You can add, edit or delete the step comments associated with the current step.

Step Template Detail – Comments Tab



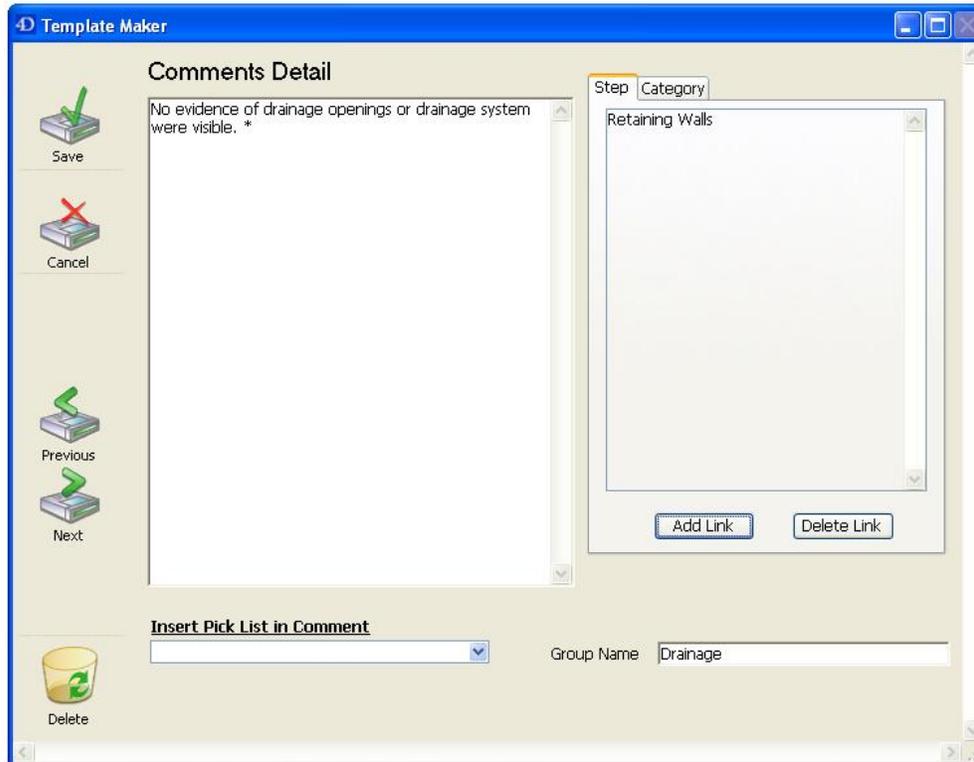
To add a new comment to the current step from scratch just tap the "Add" button and the Comment Detail screen will appear where you will add a new comment for the step.

To remove a comment from the current step select the comment you want to remove and click the "Remove" button. This removes the link between the comment and the current step. The comment will remain in the overall comment library. However, it will no longer appear in the comment list for the current step.

Comment Detail Screen

To view or edit a “Step Comment” select the comment and click the “Edit” button. The Comment Detail screen will appear.

Comment Detail Screen



The main text box on the left is where the text of your comment is entered. On the right are two tabs that represent a list of all the comment links to other areas of the template. The Step tab will contain a list of all the steps to which the current comment is linked.

Click the “Add Link” button to link the current comment to another step.

Comments

A comment can be single words like "broken", "rotten", "deteriorated" or it may be partial sentences like "cracked & settled", "recommend repair", "loose at the connector" or it may include full sentences like "Grade under the deck slopes toward the foundation. Adjusting the grade accordingly is suggested." or "Service panel appears to lack bonding to the ground system." It is up to the inspector to determine the style of inspection report. The InspectNOW template contains an expansive comment library. However, each inspector has the freedom to add, change, or delete comments in the library.

Checklist style reports tend to be more effective with single words or short phrases in the comment area. Narrative style reports work well where full sentences or even paragraphs are the norm for the comments. Template Maker provides the flexibility to modify the template data according to the inspector's own preference.

Another strong feature in the InspectNOW System is the ability to have fill-in-the-blank items with a comment. For example, "Limited review due to ^." where the caret symbol "^" initiates a fill-in-the-blank dialog when the comment is picked. This eliminates the need to create a dozen or so comments that have every conceivable combination like: "Limited review due to snow.", "Limited review due to boxes.", "Limited review due to furniture." etc. Instead you create one comment with an insertion caret in place of the inserted word or phrase.

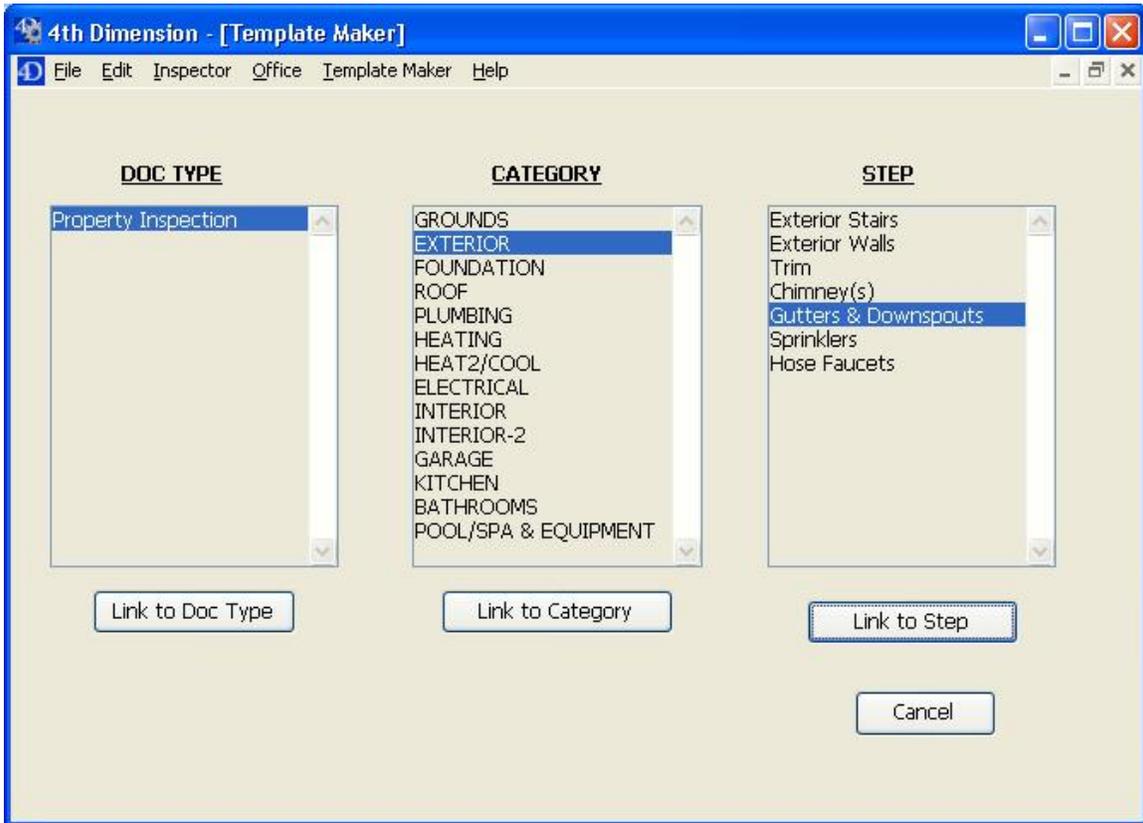
It is also possible to go one step further and create a pick list of items for the fill-in-the-blank area of the comment. For example, you could have a comment like this: "Limited review due to <<limited>>." where the text between the two insertion points represents a pick list of words or phrases made available for insertion into the comment. For this example the word "limited" can be the list name for a list that contains the words or phrases ("snow", "boxes", "and furniture", "construction items"). For more information on lists in Template Maker refer to the "Lists" section later in this manual.

Adding Step Links

Template Maker provides the ability to link a single comment to multiple steps without having to recreate the comment. To add a step link to an existing comment, first, go to the comment detail screen for the comment to be linked. Notice the current step links are listed to the right of the comment.

If for example you wanted to link this comment to the Garage Floor step, in the Step Link window click the "Add Link." The "New Step Link" dialog comes up (Diagram 2.9)

Comment Link Dialog



In the "Comment Link" dialog select the appropriate "DocType", this will update the "Category" pick list options. Then select the category in the category pick list and this will update the "Step" pick list options. Finally, select the step you want to which to be linked. In this example, "Gutters & Downspouts" is selected. Tap the "Link to Step" button and that step will now be linked to the comment and will appear in the step list to the right of the comment.

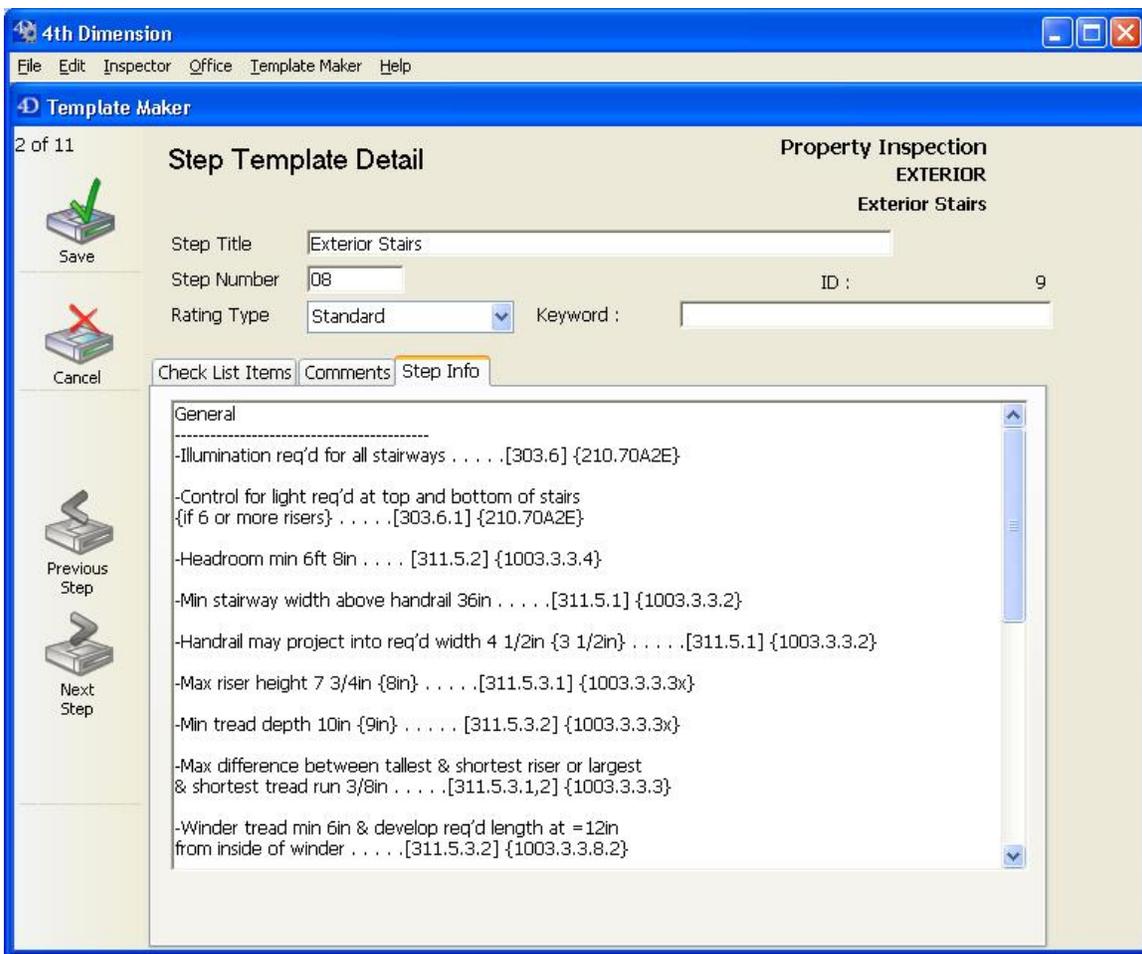
There is no limit to the number of step links you can have associated with a comment. Linking comments can save you time when setting up or editing your comment library.

Step Info Tab

One of the unique features of InspectNOW is the ability to have useful reference information associated with, and accessible at, each step. InspectNOW comes loaded with applicable Code Check 4th Edition comments. The text is available to help the inspector in the field but does not print on the actual inspection report. It is for reference only.

Additional comments can be added to the initial Code Check references. To add Step information for a Step you need to go to the Step Detail dialog and select the "Step Info" tab.

Step Template Detail – Step Info Tab

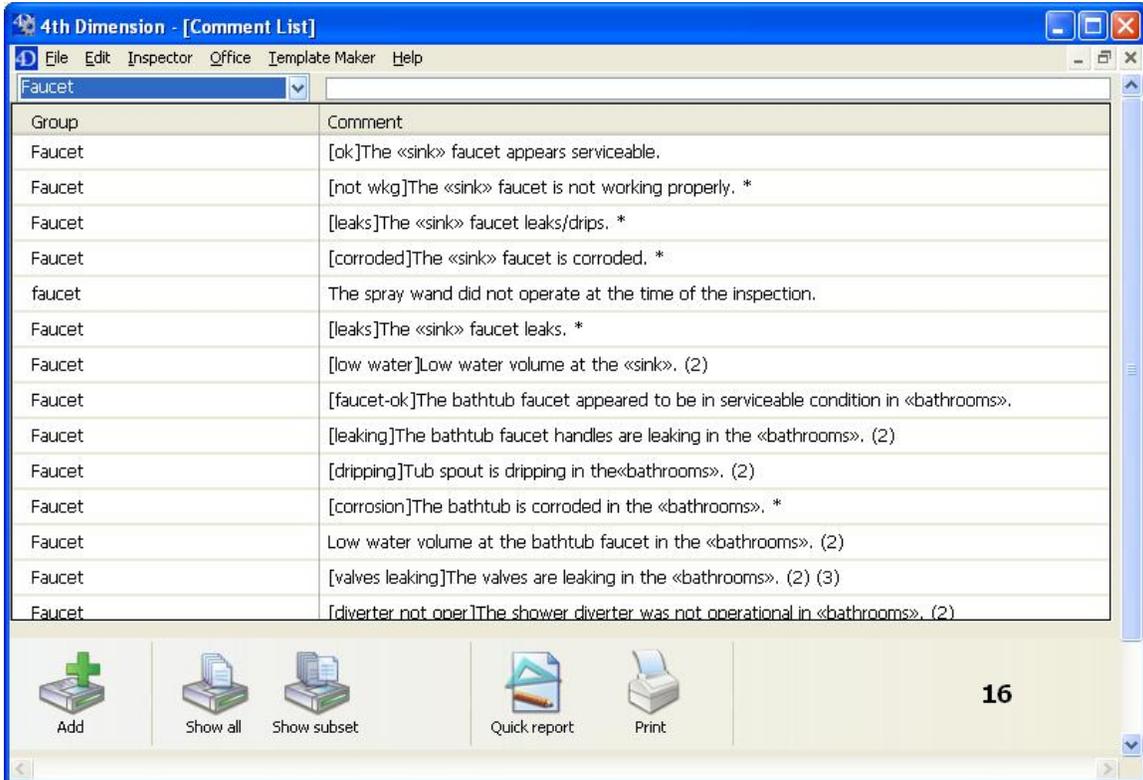


Sentences or paragraphs can be added into the Step Info text field. Tap the "Save" icon to accept the change.

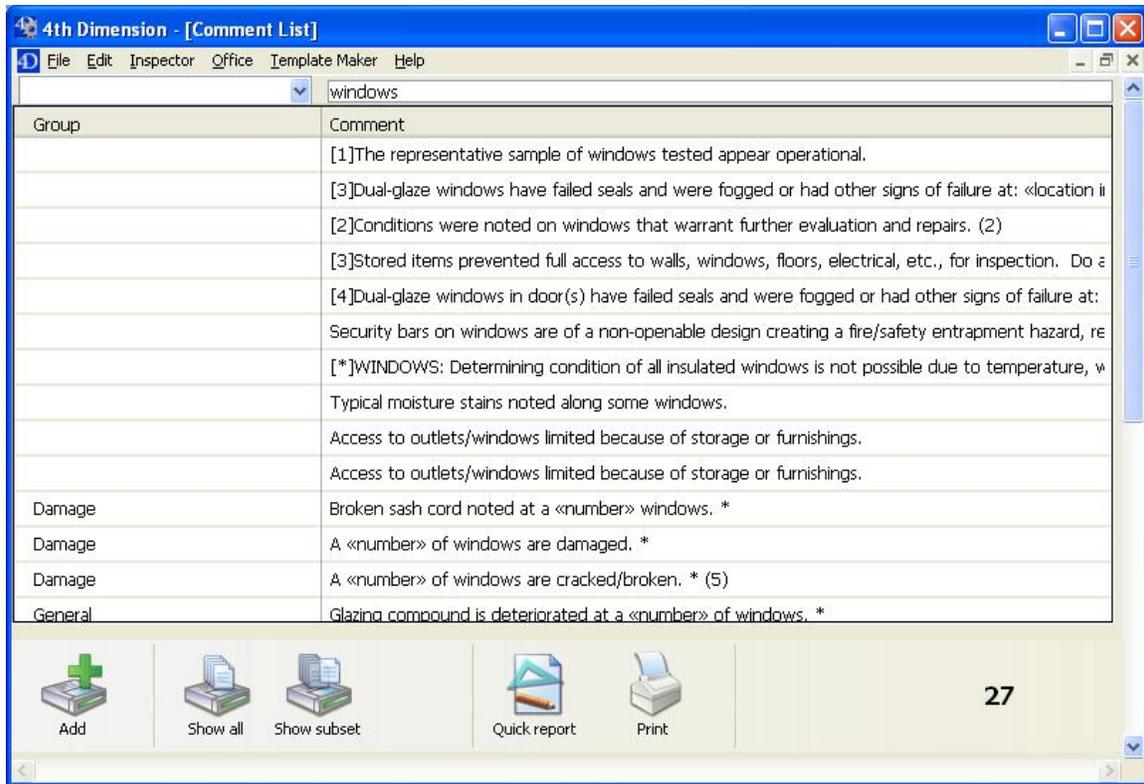
Comment List Menu

From the Template Maker menu you have the ability to view the comment library independent of Template Type, Category or Step by clicking the “Comments” item. The “Comment List” will appear.

Comment List



Use the drop-down box above the “Group” column to filter the list by group. The above example has filtered the comments by the group “Faucet”.



Type in the text box above the “Comment” column to filter the list the content of the comments. (Note – this is a “hot key” filter. This means that as you enter characters into the field it will immediately filter the list of comments by the letters that are entered.) It performs a “contains” search which means that it will find any comment that “contains” the text anywhere in the comment. For example, if you type the letters “moist”, the list will display ALL comments containing the work “moist” or “moisture”.

Just double-click on a comment to edit it.

Add Comment – Click the “Add” button to add a comment to the library.

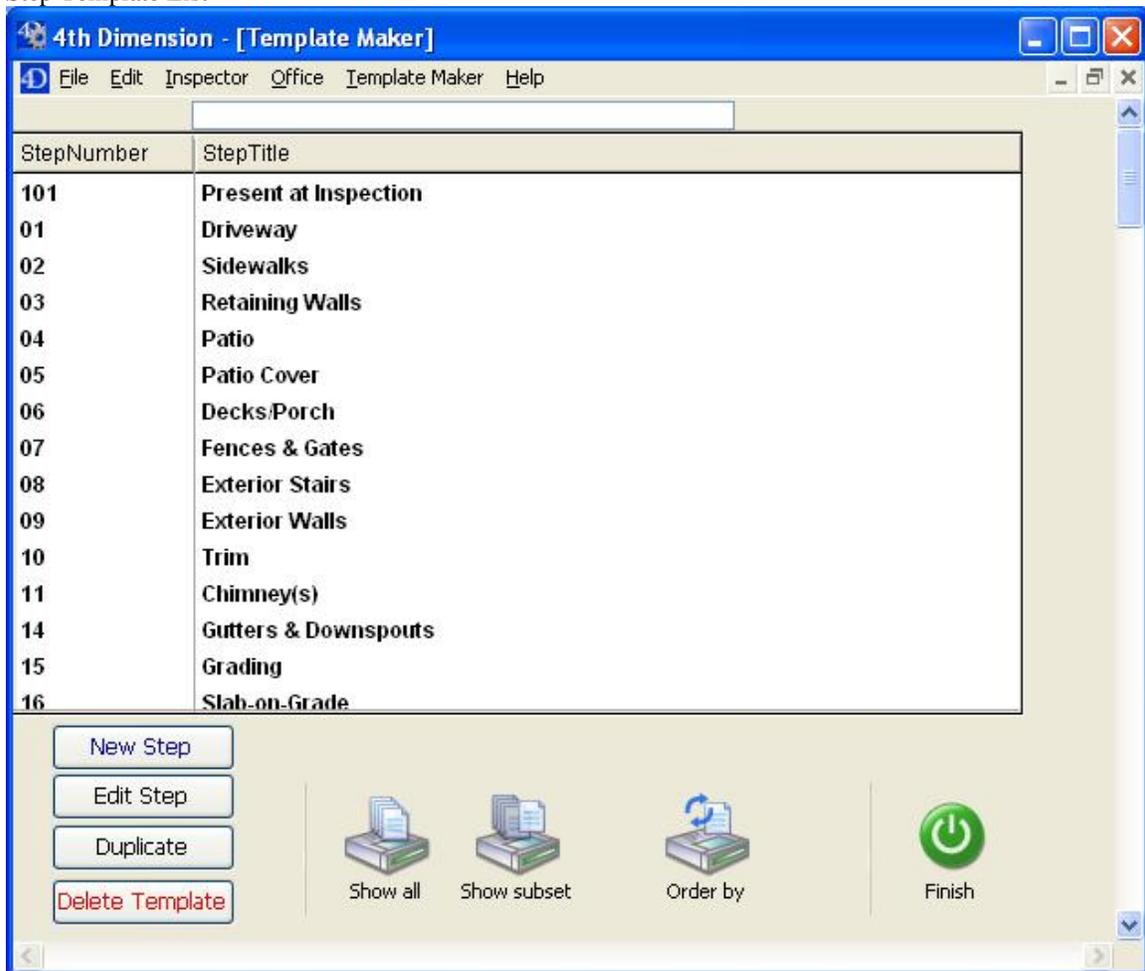
Print Comment Report – Click the “Print” icon at the bottom of the screen to generate a report with the comments contained in the list. (Note – Click the “Show All” icon to remove any filter and display all comments in the library. You can “Shift-Click” items in the list to select groups of comments or “Ctrl-Click” to select individual comments, then use the “Show Subset” icon to reduce the selection to the “highlighted” items only. This provides control over which comments will be included when printing the comment report.

To view a list of all steps independent of Inspection Type or Category, from the “Template Maker” men click on the “Step Templates” menu item. The step template list will appear.

Step List Menu

To view or edit a “Step” in the list, select it and click the “Edit” button on the bottom of the screen or double-click on the Step and the Step Editor will appear.

Step Template List



“New Step” Button – Click this button to create a new step.

“Edit Step” Button – Click a step in the list to select it and click this button to edit the step.

“Duplicate” Button – Click a step in the list to select it and click “Duplicate” to create a copy of the selected step.

“Delete Template” – WARNING: Use this button with extreme caution. Deleting a step template cannot be undone. To permanently delete a step template, click on the step to select it and click the “Delete Template” button.

Rating Types and Rating Items

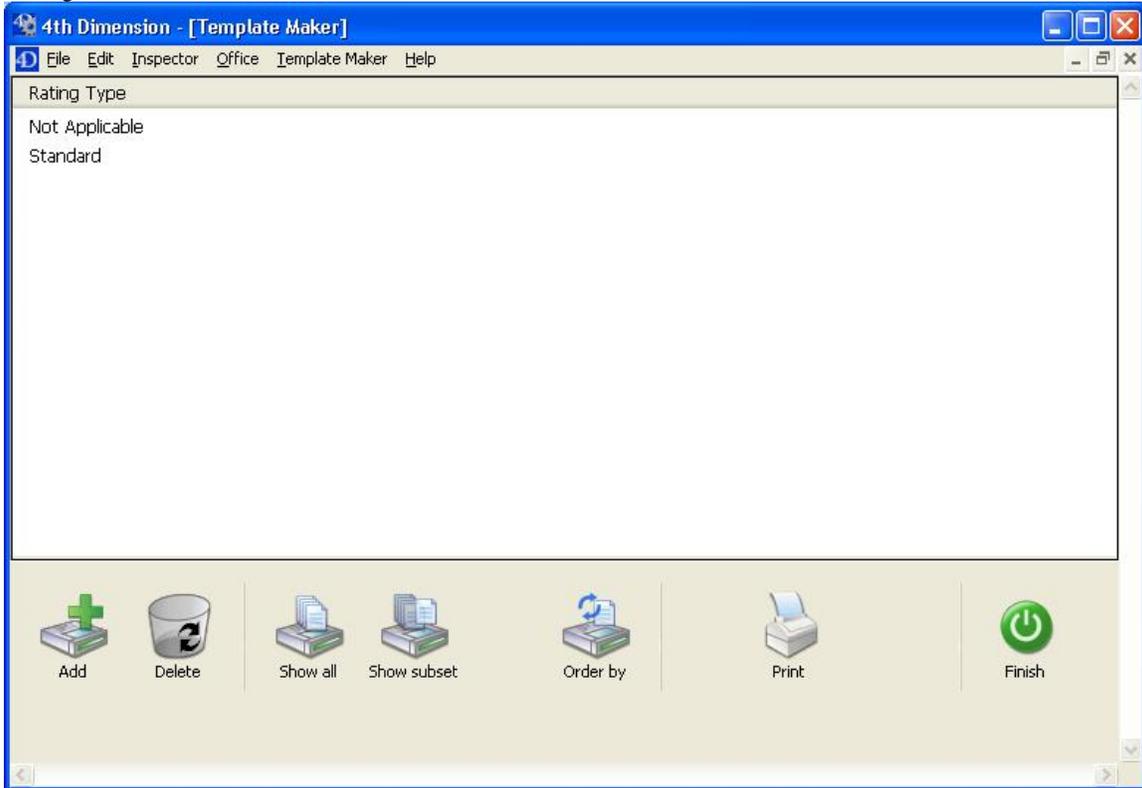
In InspectNOW for each step you may enter a rating by selecting it from a rating pick list. A particular rating pick list appears for a given step because of the rating type assigned to that step in Template Maker. For example, the Exterior Walls step has been assigned the “Standard” rating type which includes choices such as “Serviceable”, “Repairs Recommended”, “Safety Hazard”, and “Not Applicable”.

In the Matrix Report all the steps use the same “Standard” rating type and, therefore, have the same choices available as part of the rating pick list in InspectNOW. **If a change is made to a rating type in Template Maker, that change will apply to ALL of the steps that are linked to that rating type.** (You can change the rating type for any given step through the Step Editor- Diagram 2.4 and selecting a different rating in the Rating picker list)

Creating or Changing Rating Types and Rating Items

From Template Maker, click on the “Ratings” tab to view or edit rating types. To return to the “Template” list, click on the “Templates” tab.

Ratings Tab – Main Screen



Rating Detail Screen

To view or edit a “Rating Type” in the list, select it and click the “Edit” button on the bottom of the screen or simply double-click on the rating type. The rating type dialog will appear.

Ratings Detail Screen

ChoiceName	SummaryFlag	CommentFlag	DefaultFlag
Appears Serviceable	<input type="checkbox"/> Summary	<input type="checkbox"/> Comment	<input checked="" type="checkbox"/> Default
Repairs Recommended	<input checked="" type="checkbox"/> Summary	<input checked="" type="checkbox"/> Comment	<input type="checkbox"/> Default
Safety Hazard	<input checked="" type="checkbox"/> Summary	<input checked="" type="checkbox"/> Comment	<input type="checkbox"/> Default
N/A	<input type="checkbox"/> Summary	<input type="checkbox"/> Comment	<input type="checkbox"/> Default

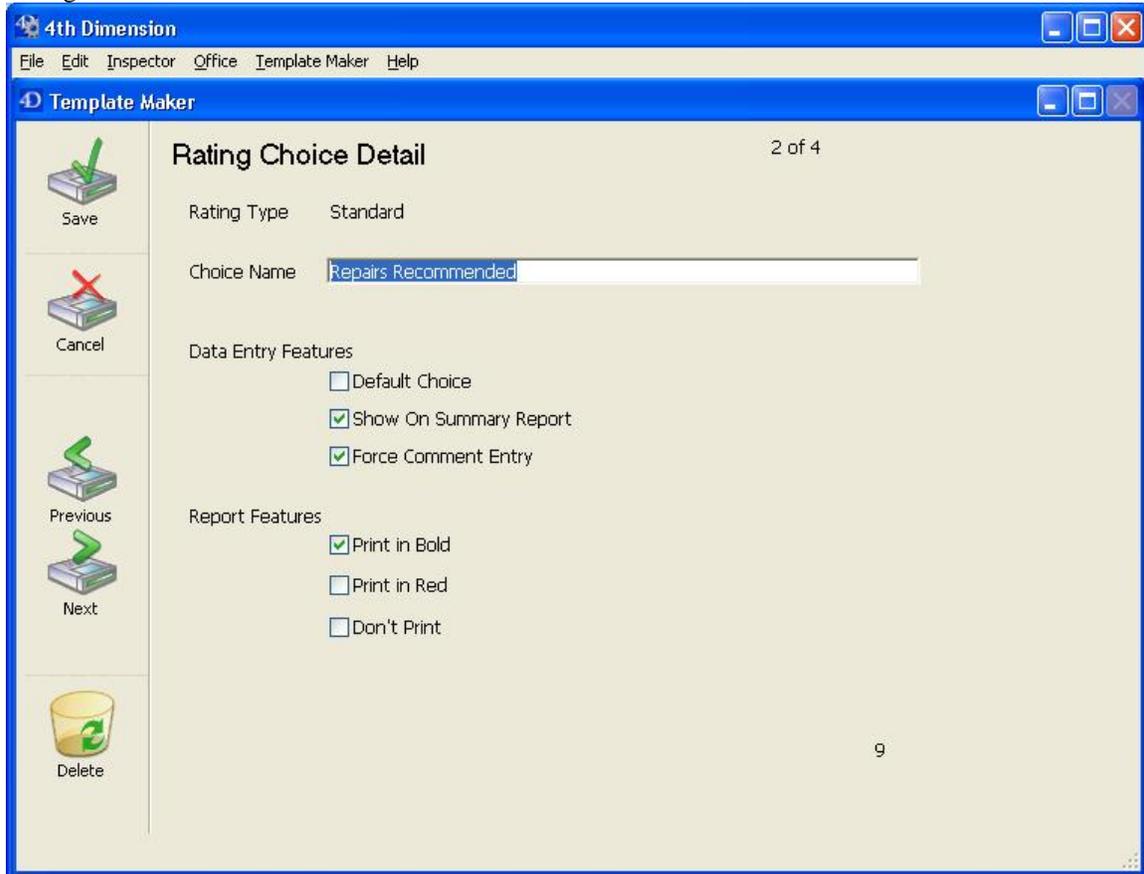
On the left you will see two fields that relate to the current “Rating Type”. The “Rating Name” is simply that; the name of the current Rating Type. This is an enterable field. The “Rating Description” is a place for you to provide a more detailed description of the current Rating Type.

Notice on the right there is a list of “Rating Choices”. These are the choices that will appear in the “Rating Pick List” for any step that is linked to this “Rating Type”. Use the buttons at the bottom to add, edit, or delete rating choices.

Rating Choice Detail

Double click on a “Rating Choice” to view or edit that choice in the Rating Choice Info dialog.

Rating Choice Detail Screen



Notice that there are five check boxes that control the behavior for each “Rating Choice”:

Default Choice – Makes this choice the default for this rating type when using the “Apply Defaults Button” in InspectNOW. Only one choice can be the “Default Choice”.

Bring up Comment Slip – Causes the “Comment Entry Screen” to automatically appear when this choice is selected. This is especially useful for Rating Choices that require supplemental information to be supplied as a comment.

Show in Summary Report – This controls whether the comment will appear on the Summary Report or not. Some inspectors do not want minor defects to show up on the summary report.

Print in Bold – This causes the Rating Choice to appear in boldface type on the reports.

Print in Red – This causes the Rating Choice and its associated Comment to print in red on the reports. A color printer is required to use this feature of course.

Don't Print – This causes the Rating Choice to be blank on the report.

Rating Types can consist of many different types. When using the standard Matrix Report the rating types are locked and can not be changed. The rating types are not locked and can be changed in the Property Inspection data template. Changing rating types is an advanced feature of InspectNOW and should be used with care. We recommend careful consideration when changing the rating types. Changes to the rating types will require changes to the key page and subsequent headers throughout the report.

Advanced Rating Considerations: In the list shown in Diagram 2.12 earlier you saw many different examples of Rating Types. The **Standard** Rating Type consists of rating choices associated with components that are rated at different levels of acceptability or wear and tear. Examples of these types of rating choices are: Functional, Serviceable, Marginal, Defective, Non-Functional, Hazardous, Lacks Maintenance, Review, Improve, and Monitor as well as other examples.

There are also other types of rating types you can create. Another example is a "Yes/No" Rating Type that would have rating choices of "Yes", "No" and maybe a "NA". This Rating Type would be assigned to Steps that were actual "Yes/No" type questions like "230. Water damage noted?" You could have the "No" rating choice as the default. If you wanted other "Yes/No" type Steps that you wanted to default to "Yes" (like a "450. Smoke detectors present ?") instead of "No" you would need to create another Rating Type called maybe "No/Yes" with the same rating choices but with the "Yes" rating choice as the default instead.

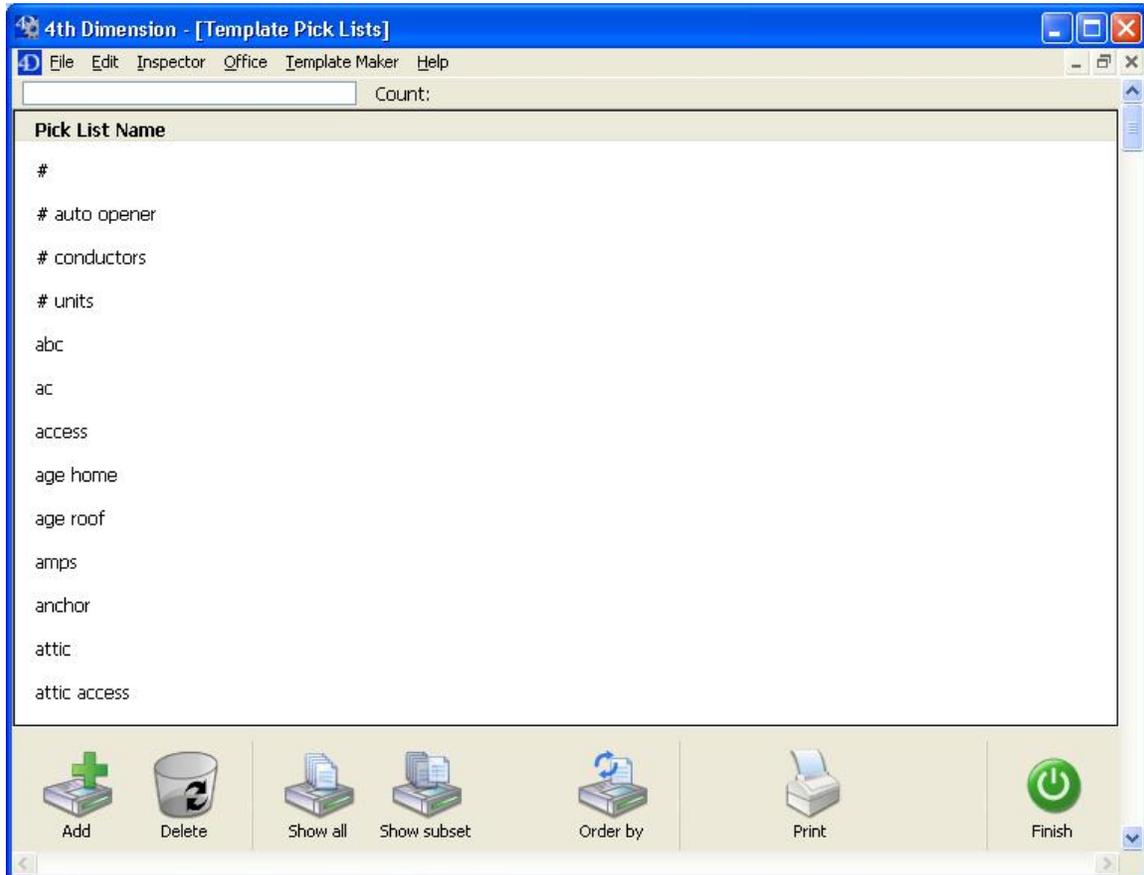
You could also create Rating Types that have specific range choices like AMP size or fuel type. The key is to remember that with a Rating Type only ONE of the choices can be selected for a specific Step. If you need the ability to pick more than one of the choices on a specific Step then they should be in the Material List instead where you can select multiple items for a specific Step. You would not use Rating Types for a Step asking who is attending the inspection since multiple items would need to be selected for the Step.

(WARNING: Before deleting any Rating Types from Template Maker you should make sure there are no present Steps using that Rating Type.)

Managing Custom Pick Lists and List Items

In a previous section about comments the ability to have a pick list inside comments was indicated. These pick lists are called "Lists" and you can edit them by going to the "Pick Lists" item in the Template Maker menu.

"Pick List" List Screen



Double-click on a List item or select one and click the "Edit" button. The "List Editor" dialog (Diagram 2.15 below) will come up.

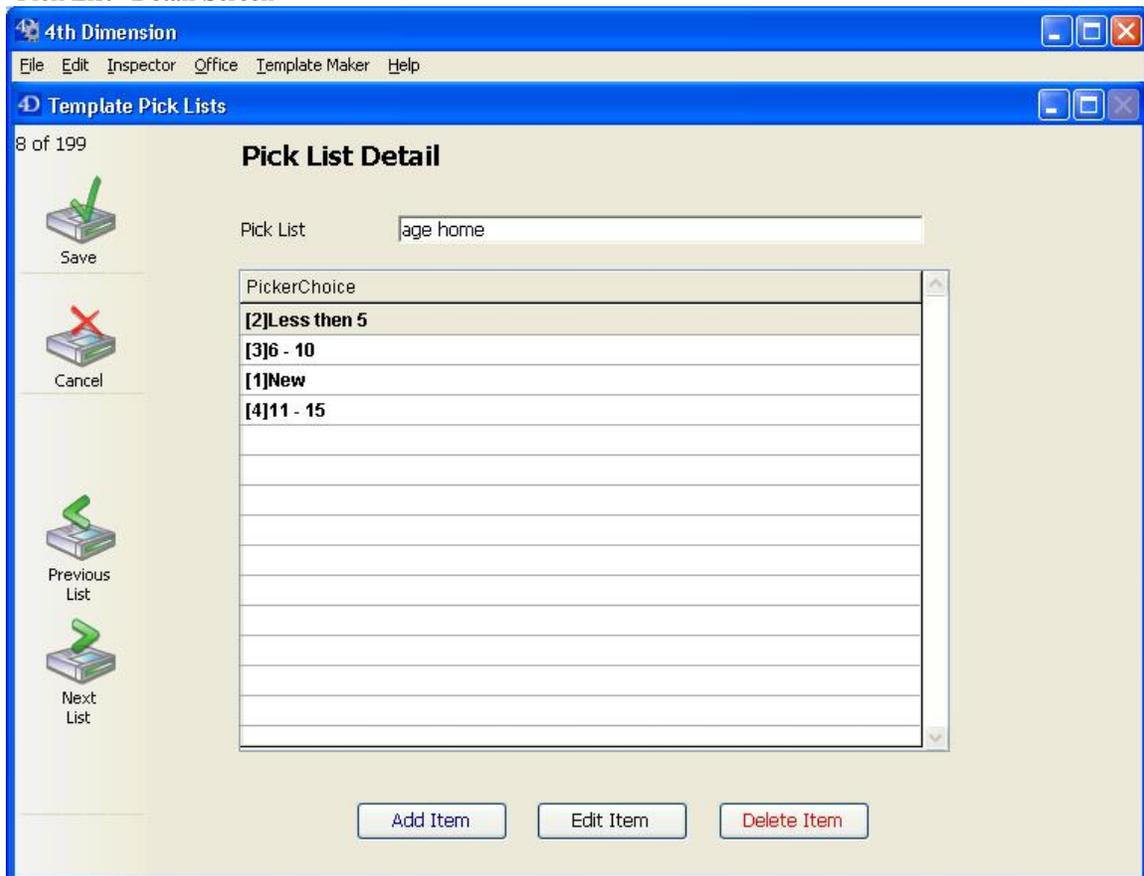
Find a Pick list – To find a particular pick list, type its name in the text box above the "Pick List Name" column. This is a "hot-key" filter. As letters are typed the selection of lists is immediately filtered by the letters in the box. This is a "contains" search, which means it looks for a pick list name containing the letters that are typed anywhere in the name.

Pick List Detail

Add Pick List – Click the “Add” button to create a new pick list.

Edit Pick List – Double-click on an item to edit it.

“Pick List” Detail Screen



Use the “Add Item”, “Edit Item”, and “Delete Item” buttons to add, change, or delete items that will be part of the pick list. Click “Save” to save your changes.

Use the list navigation arrows to navigate to the previous or next list from the Pick List Detail screen.

Template Maker Rules of Thumb

- 1) Categories and Steps for a given inspection are determined at the time the Inspection Type is selected in Inspector.
- 2) Changes made to a template will be seen after a new inspection is created and the modified template is selected in Inspector.
- 3) Removing a step link from a comment will make that comment no longer appear in the comment pick list for the corresponding step.
- 4) Removing a category link from a comment will make that comment no longer appear in the comment pick list for the corresponding category.
- 5) Removing a step link from a category will make that step no longer appear in the step list of that category for ALL inspection templates that are linked to that category.
- 6) Removing a category link from an Inspection Template will make that category no longer appear in the category list of that Inspection Template.
- 7) Deleting a Step directly from the Step List will cause that step to be removed from every category that it is link to.
- 8) Deleting a Category from the category list in Template Maker will permanently delete that category from the entire database. The category will no longer be available in ANY of the Inspection Templates.
- 9) Ratings are linked to Steps by the Rating Type field. Modifying the Rating Type field will “unlink” that rating from any steps that were using it.
- 10) Adding or modifying rating choices to a Rating Type will automatically take effect for all steps linked to the Rating Type. Most steps are linked to the “Standard” rating type in the residential property inspection type.