INSPECTION TRAINING ASSOCIATES

InspecTrix Pro
User's Guide

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Introduction to the InspecTrix Pro Inspection Report System

With InspecTrix Pro a professional home or property inspections is only a click away.

I nspecTrix Pro is a powerful tool for the home inspector. InspecTrix Pro covers the full spectrum of data collection and retrieval for a home inspection business. InspecTrix Pro can track a property inspection (or multiple inspections), from the first telephone call to the final delivery of the completed report.

InspecTrix Pro Features

InspecTrix Pro creates a form style inspection based on the Matrix inspection forms created by ITA. Among other features available is a business control section containing both the Contact Manager and the Marketing Manager. There is also the capability to process digital photographs. InspecTrix Pro can give you additional control in your inspection scheduling. For the business with more than one inspector, the schedule option tracks multiple inspections and inspectors.

Introduction to the Biz-Control Program

Biz-Control allows the user to schedule inspections, print contracts, compose and print letters, and create business reports in an efficient manner.

T he Biz-Control Section consists of the Inspection Scheduler, Automated Order Form (also available with Matrix and Narrative packages), Notes Page, Contact Manager (containing the Client and Agent directories), Marketing Manager, and Business Letters and Business Reports sections.

Biz-Control Components

Inspection Scheduler: The Scheduler allows the instant call up of inspections though an easy-to-use calendar.

Inspection Order Form: The Inspection Order Form is a comprehensive tool for assigning inspections. The use of pop-up windows and pull-down menus allow the user to input information in a quick and easy manner. Information from the Order Form is also forwarded throughout the program. Areas populated by entries in the Order Form include business reports, contracts, inspection report forms and Cover pages.

Inspection Contract: The Inspection Contract is included, ready to print, with the client name and property information from the order form. The user may modify this contract to comply with city, state or local requirements.

Contact Manager: The Contact Manager allows instant access to the Agent directories. This feature also allows instant input of agent information into the order forms.

pop-up windows and pull-down menus allow the user to input information in a quick and easy manner. The information on the Order Form is used to generate business reports, fill in required data in the contract, in the inspection report, and on the Covers.

Notes Page: The Notes page is included as a space to make any comments pertaining to the inspection.

Marketing Manager: Marketing Manager is your marketing tool. Use it to forecast costs, track expenses, and monitor progress of your marketing projects. You can have as many different projects as you like; InspecTrix Pro will track all of them separately.

Business Letters: There is a standard library containing 35 Business Letters. The user can change all letters in this library.

Business Reports: There are 11 Business Reports available in this section. Information is automatically taken from the order forms and processed within these reports.

Scheduler

The scheduler is designed to be a tool to allow the easy planning of inspections. The calendar is tied to the computer calendar.

Entering the Scheduler: To enter the Scheduler, press the Scheduler button on the **Main Menu.** The Scheduler page contains a calendar that may be used to look up existing inspections or schedule future inspections. To select the month, use the left and right arrows located to either side of thew month and year.

To Review Inspections: To review an inspection scheduled for a certain day, click on that date inside the calendar. All inspections scheduled for that date would be listed. If no inspections are scheduled for that date you will get a screen asking you to cancel or continue - click Cancel. You will go back to the main scheduler screen with all reports displayed.

To Sort Inspections: To sort inspections in the scheduler, click on the applicable sort button in the upper right corner of the screen.

To Schedule an Inspection: Select the date on the calendar. If no inspections are scheduled for that date you will get a screen asking you to cancel or continue, click cancel. You will go back to the main scheduler screen with all reports displayed. The window to the right of the calendar will now display the date you selected. Click the New Report button to the right of the desired date. You may now enter the inspector's name, a report number, the inspection address, and the time of inspection. The To ORDER FORM button will now take you to the Order Form.

To Find an Inspection: Select the date on the calendar. If no inspections are scheduled for that date you will get a screen asking you to cancel or continue, click cancel .

Inspection Order Form

Entering the Order Form: The Order Form may be accessed two ways. Beginning with the **Main Menu** the user may either use either the Scheduler or Find Inspection buttons.

Entering Information: Information in the Order Form can be entered either manually, though the use of check boxes, or in many cases by pull-down menus. The user may modify pull-down menus used on the Order Form.

Modifying Pull-Down Menus: Open the pull-down menu. At the bottom of the existing comments is the word **Edit**. Click on Edit; you will open a new window. Type the information in the box. Once you are finished click on the Done button.

Entering Agents Using the Add/Look-Up Buttons: For users of the Biz-Control and DUO programs, the automatic look-up feature is enabled. This allows the inspector to look up agents in the Contact Manager. Once the agent is found, a single click will import all the agent data to the order form. Inspectors may also enter agents into the Contact Manager through this button.

To Look Up an Agent: Click the Add/Look-Up button. Enter any search information in the boxes and press the **enter** key (or click the Continue button on the gray bar). Select the appropriate agent from the list and click the Copy Agent to Order Form button.

To Add an Agent: Click the Add/Look-Up button. Click on the Add Agent button. Enter any agent information in the boxes and press the **enter** key. Click on the Copy Agent to Order Form button.

Notes Page

Entering the Notes Page: Click the Notes button on any of the forms pages.

Using the Notes Page: Click in the large box. Once you have a blinking cursor, you may type any information you desire. Information may be sent to the notes page from any other page by clicking on the text and clicking on the Copy to Notes button.

Contact Manager

Entering the Contact Manager: Click the Contact Manager button on the **Main Menu**.

Sorting Contacts: Click on the View as List button in the lower right of the screen. Select the Sort button. The Sort Records screen will appear. Select your choices for sorting from the left window (for example Contact Last to sort by the contacts' last names), and click on the Sort button.

Finding a Contact: Click on the Find Contact button. Select the field you wish to search (name, company, etc.). Enter the name, title, telephone number, etc. Click Continue. You may find single contacts or multiple contacts through this method.

Adding a Contact: Click the Add Name button at the **Contact Manager** main screen. Fill out the information blocks.

Using the List: The List is useful for scanning over a group of contacts. Click on the View as List button in the lower right of the screen. You may sort, find contacts, or print the Detail list using the buttons in the upper right of the screen.

The List also the only screen in which you can modify the Contact Code (the number assigned to each contact). The user may edit single Contact Codes or resort all Contact Codes. For information on to resort Contact Codes please refer to the Troubleshooting section of the manual.

Writing Letters: Letters may be created for agents, clients, or other contacts listed in the Contact Manager. There is also an option to send letters to the primary address or a secondary address. Letters may be edited here for a custom touch, or edited in the Letters Library for future use.

> **Mail Merging:** Letters may be created for multiple contacts. To create letters to multiple contacts:
> 1. Select a group of contacts. (Use the find methods mentioned above)
> 2. Select the LETTERS button.
> 3. Select the letter you wish to send this group.
> 4. Click on the PASTE THIS LETTER TO ALL CONTACTS button.
> 5. Select the Print icon.

Printing Envelopes: Envelopes may be printed containing the contact's name and your return address and logo.

Faxes: Faxes may be sent (provided the appropriate FAX SOFTWARE is installed in the computer). Prepare your FAX, click Print, and tell the computer to print to your FAX software.

Finding Contacts: The $\boxed{\text{Find}}$ button will give you a find screen where you may find specific contacts. Enter a contact name, company name or other information in the blocks and click $\boxed{\text{return.}}$ You will return to the Contact Manager main screen. All contacts that match your find data will be selected.

Listing Contacts: The $\boxed{\text{View as List}}$ button allows you to sort and list contacts. This is also the page on which you can modify the Contact Number.

Creating Labels: Labels may be printed for either one contact or for multiple contacts. First, select which contact(s) you want to make labels for. For single labels, "Current record" must be selected at the print screen. For multiple labels, the "Records being browsed" must be selected at the print screen. Click the $\boxed{\text{Continue}}$ button. Select which type of label is to be used. Click $\boxed{\text{Print}}$.

Marketing Manager

Entering the Marketing Manager: Click the $\boxed{\text{Marketing Manager}}$ button on the **Main Menu.** You will be taken to a Project screen. You may page through the projects using the $\boxed{\text{Previous/Next Record}}$ buttons.

To Find a Project: Click on the $\boxed{\text{Find Project}}$ button. Enter the name of the project and hit the **Enter** key.

To Add a Project: Click on the $\boxed{\text{Add Project}}$ button. Enter the information for the project.

Milestones: Click on the $\boxed{\text{Milestones}}$ button. Enter the milestones. You may use the **Back Key** to return to the Project screen.

Reports: There are three reports available. The Quarterly Budget Report tracks the costs of the various projects in work during the quarter. The Accomplishments Report tracks actions completed for the various projects. The Steps Required Report lists the actions needing attention.

Project List: The Project List gives a simple listing of the projects contained in the Marketing Manager.

Business Letters

Business letters may be generated either through the Main Menu or through the Contact Manager. 16 standard specific letters and 26 open letters may be created or

modified by the user. Letters are automatically retrieved from the Letters Library. To make changes to the Letters Library please refer to Chapter 4.

Entering Business Letters via the Main Menu: Click the Edit Letters Library button on the Main Menu. You will go to a Letters Menu screen. From this page you may select whether you wish to send a letter to the Client, the Buyer's or Seller's Agents, or the Sellers. Select the letter recipient, and you will go to the letter screen. Here you may select from any of the various letters available in the library by clicking on the gray bar.

Entering Business Letters via the Contact Manager: Click the Letters button in the Contact Manager. You will be given the option to mail the letter to the main address or another address. You will go to the letter screen. Here you may select from any of the various letters available in the library by clicking on the gray bar.

Business Reports

There are 13 Business Reports available as well as four Directories. All data contained within the Business Reports come from the Order Forms.

Entering Business Reports: Click the Business Reports button on the **Main Menu**. You will go to the **Business Summary** screen.

Printing Business Reports: Printing a Business Report is different from printing regular reports in one respect. To print all the data contained in the browse screen, the printer must be told to print Records being Browsed in the print screen.

Introduction to the InspecTrix Pro Matrix Inspection Report

The Matrix Inspection Report is an easy to use Form style inspection. The Matrix software is modeled on the popular ASHI (American Society of Home Inspectors) approved Matrix Inspection Forms.

The Matrix Inspection Program consists of the Automated Order Form, Inspection Contract, Forms Section, an Overview Page, a Notes Page, a Custom Page, a Comments Page, a Summary Page, and a Pictures Page.

Matrix Program Components

Inspection Order Form: The Inspection Order Form is a comprehensive tool for assigning inspections. The use of pop-up windows and pull-down menus allow the user to input information in a quick and easy manner. Information from the Order Form is also forwarded throughout the program.

Inspection Contract: The Inspection Contract is included, ready to print, with the client name and property information from the order form. The user may modify this contract to comply with city, state or local requirements.

Keys Page: The Keys Page is designed to give the client information needed to better understand the parameters and restrictions pertaining to the inspection.

Matrix Form Pages: The Forms Section allows the user to create an inspection using pre-formatted forms.

Overview Page: The marking of blocks within the Forms Section automatically generates the Overview Page. It is used to draw attention to adverse marks in the form. Comments may be added in each section by the inspector.

Notes Page: This is a word processing page that allows the inspector to copy the comments made within the form section, or to type comments beyond those automatically noted in the form. The Notes Page may be expanded to ten pages.

Custom Page: The custom page is incorporated to allow the inspector to create a narrative style page. The titles and sub-titles are editable by the inspector.

Summary Page: The Summary Page allows the inspector to create a quick summary of the inspection.

Pictures Page: The Picture Pages consist of a thumbnail page and up to 18 full-size picture pages with two photos each.

Inspection Order Form

Entering the Order Form: The Order Form may be accessed using either through the Scheduler or Find Inspection buttons.

Entering Information: Information in the Order Form can be entered either manually, though the use of check boxes, or in many cases by pull-down menus. The user may modify pull-down menus used on the Order Form.

Modifying Pull-Down Menus: Open the pull-down menu. At the bottom of the existing comments is the word **Edit**. Click on Edit; you will open a new window. Type the information in the box. Once you are finished click on the Done button.

Entering Agents Using the Add/Look-Up Buttons: For users of the Biz-Control program, the automatic look-up feature is enabled. Please refer to Chapter 1 for further information.

Contract

Entering the Contract: The Inspection Contract may be accessed through the Contract button on the right button bar in the **Order Form** and the **Matrix pages**.

Editing the Contract: The user may modify this contract to comply with city, state or local requirements. Please see the section on customizing your software for information on how to select and edit contracts.

Keys Page

The Keys Page contains information concerning the footnotes and asterisks contained in various comments in the inspection. The Keys Page also contains definitions of statements used in the inspection.

To Modify the Keys Page: At the Main Menu, click on the Company Setup button. Click on the Edit Keys Page button. The user may now edit the keys contained in the **Keys Page**.

Matrix Form Pages

This is the heart of the forms inspection. Each page addresses a specific portion of the inspection. Boxes are checked by placing the cursor over the appropriate box and pressing the left mouse button. Any box checked in the Matrix that refers to an adverse condition automatically keys a statement in the Overview Page. Comments may be entered manually, or extracted from a library of comments, and placed in the comments block with the Matrix Library on Entries.

Comments formatted: Comments from the Matrix Library may be entered as formatted in the libraries through the use of the small pulldown box to the left of the main comments block.

Comments unformatted: Comments from the Matrix Library may be entered unformatted by clicking on the main comments block and selecting the comment of your choice here.

Overview Page

The Overview Page is intended to give the client a list of areas that require further attention. The check boxes used in the forms automatically key all of the areas noted.

Notes Page

The Notes Page allows the inspector to create an internal document within the inspection. This section acts as a word processor page. There are also buttons located on each of the forms pages that allow the user to automatically feed selected comments to this page.

The insert comments from a form into the Notes Page, highlight the text (you will see the text as white writing over a black background). Click on the Copy to Notes button.

Custom Page

The Custom Page is intended to give the inspector an additional page for identifying and inspecting additional units, structures, systems or areas that may not have received attention in other sections of the inspection report.

The user can modify each section heading using the existing titles and sub titles, or by typing a new title or sub-title. Comments may be entered either manually, or through the use of pull-down menus. The user may modify these pull-down menu comments by typing.

Summary Page

The client can use the Summary Page as a quick reference. Comments may be either manually entered, or pulled from the body of the inspection. To move comments from the body of the inspection to the Summary Page, the user may use the cut and paste method (See Technical Data chapter). Drop down windows are also available for use by the inspector. These drop downs may be edited through the Edit Libraries button at the main screen. Titles and sub-titles may be edited by the inspector.

Cover Pages

There are six different cover pages to choose from. Three of the cover pages allow the import of digital photos. Three covers allow the use of a company logo. These covers may be accessed through the **Covers** button on the right-hand button bar.

Pictures Page

Information on the Picture pages may be found in chapter 8.

Creating an Inspection Using the InspecTrix Pro Inspection Program

A professional inspection is as easy as one click.

T he InspecTrix Pro inspection program is designed to create professional inspections each and every time. The program uses a *Master Matrix* inspection as a standard template for the creating inspections. This master inspection may be modified to meet the user's requirements by selecting the Matrix Master Report at the Find Inspection screen and entering/editing data as desired. The Matrix Master Report is essential to the operation of the program and should not be deleted. To restore the original master, refer to Chapter 7.

Starting an Inspection (non-template)

1. Click on the **Start New Inspection** button at the Main Menu.

2. At the next screen, select continue

3. At the Order form, enter a new report ID number. (Do not duplicate or leave blank. Blank or duplicate report numbers will cause errors in the program.)

4. Enter any required information on the order form.

5. Use any of the inspection page buttons on the right hand vertical button bar to access the Matrix pages.

Starting an Inspection (with Template)

These instructions are intended for those users who have created templates. Instructions on creating a template are found in the templates chapter of this guide.

1. Click on the Start New Inspection button at the Main Menu.

2. At the next screen, select Templates List.

3. At the Templates List screen, select the template you wish to use.

4. Click the Use this Template button.

6. At the Order form, enter a new report ID number. (Do not duplicate or leave blank.)

5. Enter any required information on the order form.

6. Use any of the inspection page buttons on the right hand vertical button bar to access the Matrix pages.

Using the Scheduler

1. Click on the Scheduler button at the Main Menu.

2. At the scheduler screen, click on the NEW button. Enter the Report Number and any other information as desired. All information entered at the scheduler will automatically be transferred into the order form.

3. To use the Calendar, click on the date desired.

   a. If inspections are scheduled for this date, they will appear on a list.

   b. If there are no other inspections listed for this date, click cancel.

   c. Click the "NEW" button.

7. Enter the Report Number (Do not duplicate or leave blank). Enter the client's first and last names. All information entered at the scheduler will automatically be transferred into the order form.

7. Click the "To Order Form" button to enter the Order Form.

Inspection Order Form

Entering Information: Information in the Order Form can be entered either manually, though the use of check boxes, or in many cases by pull-down menus. The user may modify pull-down menus used on the Order Form.

Modifying Pull-Down Menus:

1. Open the pull-down menu.

2. At the bottom of the existing comments is the word **Edit**.

3. Click on Edit; you will open a new window.

4. Type the information in the box. Once you are finished click on the Done button.

Entering Agents Using the Add/Look-Up Buttons: For users of the Biz-Control and DUO programs, the automatic look-up feature is enabled. This allows the inspector to look up agents in the Contact Manager. Once the agent is found, a single click will import all the agent data to the order form. Inspectors may also enter agents into the Contact Manager through this button.

To Look Up an Agent:

1. Click the Add/Look-Up button.

2. Enter any search information in the boxes and press the **enter** key (or click the Continue button on the gray bar).

3. Select the appropriate agent from the list and click the Copy Agent to Order Form button.

To Add an Agent:

1. Click the Add/Look-Up button.

2. Click on the Add Agent button.

3. Enter any agent information in the boxes and press the **enter** key.

4. Click on the Copy Agent to Order Form button.

Entering Comments on the Matrix Pages

Comments formatted: Comments from the Matrix Library may be entered as formatted in the libraries through the use of the small pulldown box to the left of the main comments block.

Comments unformatted: Comments from the Matrix Library may be entered unformatted by clicking on the main comments block and selecting the comment of your choice here.

Using the Notes Page

General Info: The Notes page is a word processing page that allows the inspector to copy comments made within the form or narrative section. The user may also type comments in addition to those automatically entered. The Notes Page may be expanded to ten pages.

Automatic comments: For users of the MATRIX and DUO packages, the Copy to Notes Buttons in the Matrix form pages automatically feed selected comments to the Notes page.

Using the Custom Page

General Info: The Custom Page is intended to give the inspector an additional page for identifying and inspecting additional units, structures, systems or areas that may not have received attention in other sections of the inspection report. The user can modify each section heading. Comments may be entered either manually, or through pull-down menus. The user may modify these pull-down menu comments.

Using the Overview Page

General Info: The Overview Page is intended to give the client a list of areas that require further attention. These entries are self-generating. The check boxes used in the Matrix forms automatically key all of the areas noted.

Using the Summary Page

General Info: The Summary Page is intended as a quick reference. Comments may be either manually entered, or pulled from the body of the inspection. To move comments from the body of the inspection to the Summary Page, the user may use the cut and paste method (See Technical Data chapter).

Customizing Your InspecTrix Pro Program

The InspecTrix Pro Inspection Program allows the modification of a number of sections within the program.

The InspecTrix Pro Program allows the modification of contracts, libraries, logos and text. Text may be modified for font type, size, color and case.

Editing the Libraries

Editing the libraries will not affect reports already filed, but your changes will stand in the library until you change them again. **Do not use this feature to change wording in an individual report. If you want to do that, edit the report, not the library.**

Editing the Matrix Library

The Matrix Library contains all of the Matrix form comments. These comments may be modified by the user. The text may be formatted for font size, font style and text color.

1. Click the EDIT MATRIX LIBRARY button.

2. The library section you chose will open. Now click the relevant sub-section (grounds, heating, etc.) you wish to edit. Select the appropriate section to edit.

3. Change any of the comments by overwriting.

4. If you want to add a new comment to a library do it on one of the blank lines.

5. When you finish editing a library, click the menu button at the bottom of the page. This will return you to one of the Matrix Library Menu subsections.

6. When you want to return to the **Matrix Library Menu**, click the To Matrix Library Menu button.

7. At any time you wish to go back to the inspection forms select the **Main Menu** button and you will be taken back to the InspecTrix Pro **Main Menu**.

Editing the Letters Library

In addition to modifying letters already in the letters library, you also have the ability to add up to 26 of your own letters to the library by using open letters A-Z. You can spell-check your letters by using the spelling option under the Edit menu.

1. Click the Edit Letter Library button.

2. From the Letters Library **Main Menu**, click the type of letter you wish to edit.

3. Select the specific letter you wish to edit.

4. Change any of the comments by overwriting. You may modify any portion of the letter contained within the block. You may add to or delete from any of the text contained within the block.

5. When you finish editing a letter, click on any of the buttons at the top of the page.

6. To print the letter you are editing, click Print.

7. At any time you wish to go back to the inspection forms select the **Main Menu** button and you will be taken back to the InspecTrix Pro **Main Menu**.

Editing Company Information

This option allows the InspecTrix Pro user to modify this program for many of their unique needs. Among those items that can be modified by the user:

1. Addresses on the various forms of mailings, invoices, and letters.

2. For those users who charge taxes on invoices and order forms, here is where the tax modification input is taken.

3. You may change your monitor settings (100%, 150%, 200%, etc.)

4. You may use the Import Logo button to import a logo for use on the covers, forms and letters

5. You may also edit the Matrix Key.

6. You can also modify your contract to match specific conditions that may apply to your region or state.

Editing Contracts

This option allows the InspecTrix Pro user to select or modify contracts for use in the program.

To select an one of the pre-existing contracts in the program:

1. Click on SELECT CONTRACT.

2. Select from the existing contract on the select contract page using the appropriate SELECT CONTRACT PAGE 1 and SELECT CONTRACT PAGE 2 buttons.

3. If a custom contract is desired, the OPEN CONTRACT area may be used for this custom contract. Type your contract into the OPEN CONTRACT space and then select the OPEN CONTRACT PAGE 1 and OPEN CONTRACT PAGE 2 buttons.

4. The changes made will take effect once a new inspection is started.

To edit an existing contract:

1. Select the EDIT CONTRACT PAGE 1 or EDIT CONTRACT PAGES 2 buttons.

2. Edit the contract as needed.

3. The changes made will take effect once a new inspection is started.

NOTE:

Once a contract is selected and modified, going back to the SELECT CONTRACT screen and selecting any of the existing contracts will overwrite any previous copies of the contract.

Setting a Default Printer

If you change printers, or use more than one printer, you must set the default printer (the default printer set in Windows is not always the printer set in FileMaker). To update the FileMaker default printer:

1. Click the **File** menu in the upper left of the screen.

2. Click on Print Set-up .

3. Check the pop-up screen to verify the printer type you wish to use.

4. If your printer is not in the window, click the arrow to the right of the window.

5. Select your printer. It is now the FileMaker/InspecTrix default printer.

6. Try printing again.

Changing Dictionaries

Main Dictionary

You may choose between United States (U.S) English and United Kingdom (U.K) English. To do so, follow these steps:

1. Select the **Edit** menu from the top bar.

2. Drop down to Spelling. Click on Select Dictionary

3. At the Select Dictionary screen go to the **Files of Type**.

4. Change file type to **Main Dictionary (*.mpr).**

5. Go to the SYSTEM folder in the ITA2003 folder.

6. Select either U.S English or U.K English as needed.

User Dictionary

The User dictionary allows the user to learn technical terms and words.

To create a new user dictionary:

1. Select the **Edit** menu from the top bar.

2. Drop down to Spelling. Click on Select Dictionary

3. At the Select Dictionary screen go to the **Files of Type**.

4. Change file type to **User Dictionary (*.upr).**

5. Type a name for your dictionary.

6. Select OPEN. The dictionary is now in use.

Technical Information and Troubleshooting

The InspecTrix Pro Inspection Program contains a number of features designed to allow the user to maintain program with the minimum of difficulty.

The InspecTrix Pro allows for the automated backup of files and importing and exporting individual inspection reports. This chapter contains the appropriate steps to perform the above functions. Also contained in the chapter are tips on fast movement through the program as well as information on modifying text.

Making back-ups of InspecTrix Pro

The preferred method of back up to a hard drive (internal or external), ZIP drive or a JAZZ drive is using the master back up button at the Main Menu.

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NOTE

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Due to incompatibilities with some CD formats backups to CD-R and CD-RW drives, it is recommended that the CD burning software that came with the CD-R/RW drive be used to copy the complete ITA 2000 folder.

1. Start the InspecTrix pro program.

2. At the Main Menu, click on the Master Back-Up button.

3. On the next screen select the files you wish to back up

4. Select Next.

5. On the next screen, verify which files are to be backed up.

NOTE

The file will be saved with an addition of the word "Copy" to the file i.e., ITA.DUO will become ITA Copy.DUO). Later Back-ups will attach a number to the file name (ITA Copy.DUO will be followed by ITA Copy 2.DUO, etc.).

6. Click on the Click to Make BackUps.

7. At the Create Copy screen, you will be prompted to select a destination for your backups. It is recommended that backups be made to a separate folder or an external drive.

NOTE

If there is limited space available, it is recommended that the user remove the number from later copies of the files. This will allow the computer to overwrite old or obsolete back-ups.

8. Click Save.

Tips and Shortcuts

Searching for Information

InspecTrix Pro is a database. Because of this information can be found easily in practically any area in the program.

To search for inspection date(s):

1. Go to the order form of any inspection.

2. Click on the BROWSE button in the lower left-hand corner of the screen.

3. Select FIND.

4. Click in the date box on the order form.

5. Type the date (or, for a range of dates type the first date, three periods, and then the end date. For example: 1/1/2003…6/30/2003).

6. Hit the ENTER or RETURN key on your keyboard.

7. All order forms for the date(s) requested al now selected.

To search for client names, addresses, etc.:

1. Go to the order form of any inspection.

2. Click on the BROWSE button in the lower left-hand corner of the screen.

3. Select FIND.

4. Click in the appropriate box on the order form.

5. Type name, address, etc. that you are looking for.

6. Hit the ENTER or RETURN key on your keyboard.

Copy and Paste

Copy and paste is a tool to move text and pictures throughout the program. Two methods are available to the user.

Copy and paste: Mouse only:

1. Highlight the text to be copied. (Left click and drag the mouse cursor across the text to be highlighted. You will see the text change to white writing over a black background.)

2. Right click on the highlighted text and select Copy.

3. Go to where you wish to insert text.

4. Right click in the text box and select Paste. The text will appear.

Copy and paste: Mouse plus pull down menus:

5. Highlight the text to be copied. (Left click and drag the mouse cursor across the text to be highlighted. You will see the text change to white writing over a black background.)

6. Go to the | Edit | menu at the top of the screen. Select Copy.

7. Go to where you wish to insert text.

8. Go to the | Edit | menu at the top of the screen. Select Paste. The text will appear.

Copy and paste: Mouse and keyboard:

1. Highlight the text to be copied. (Left click and drag the mouse cursor across the text to be highlighted. You will see the text change to white writing over a black background.)

2. Press the **Control** and **C** keys (Ctrl-C) simultaneously.

3. Go to where you wish to insert text.

4. Press the **Control** and **V** keys (Ctrl-V) simultaneously. The text will appear.

Text Options

Changing Fonts

1. Go to the text of choice.

2. Go to **Format** at the top of the screen and pull down to Font

3. Click on the font of your choice. You will go directly back to your typing screen.

Changing Font Size

1. Go to the text of choice.

2. Go to **Format** at the top of the screen and pull down to Size.

3. Click on the size of your choice. You will go directly back to your typing screen.

Adding Fonts

1. Go to the text of choice.

2. Go to **Format** at the top of the screen and pull down to Font.

3. Click on Configure/More Fonts

4. Select one of the fonts available in Windows. You will see a sample of the fonts in the small screen on the right. Once you find the font that you like, click OK.

5. Go to **Format** at the top of the screen. Pull down to Font

6. Select your new font. You will go directly back to your typing screen.

Changing Text Color

1. Go to the text of choice.

2. Go to **Format** at the top of the screen and pull down to Font.

3. Click on ☐ Text Color

4. Select one color in the screen. You will go directly back to your typing screen.

Inserting Symbols or bullets into text

1. Go to the text of choice.

2. Go to the **Format** Command at the top of the screen and pull down to Font.

3. Click on ☐ Configure/More Fonts

4. Select one of the Symbols fonts available in Windows. You will see a sample of the fonts in the small screen on the right. Once you find the font that you like click OK.

5. Go to the **Format** Command at the top of the screen and pull down to Font .

6. Select your new font.

7. Type a symbol. It may be modified for size and color just like regular text.

8. Once this symbol is to your liking, you can cut and paste into other comments or statements.

Fast movement between sections of the program

Once a section of the program has been opened, you may access other sections in InspecTrix Pro quickly through the Window Command at the top of the screen. Simply click on **Window** and pull down to the section you wish to access. This is especially useful for editing the libraries and contracts.

Troubleshooting

JPEG-25 error when importing a logo

The picture file was created in a format that is not readable by the InspecTrix Pro program. This occurs when a file is created with a CYMK format. Have the creator of the logo save the file in a RGB format and import the new JPEG into the program.

JPEG error when printing a photo

Symptom: When attempting to print a photograph that is visible in the program, the photograph does not print but displays a JPEG error text inside of the photo box. This is due to importing a photo that has a file size larger than is usable for printing. Lower the camera settings until the photos print correctly.

Restoring the Matrix Master Report

The Matrix Inspection program is dependent on a master inspection as the template for the creation of inspections. If the Matrix Master Report is damaged or deleted, it may be recovered through the following procedures:

1. Go to the Master Menu.

2. Find an existing inspection; go to the Order Form for this inspection.

3. Once at the order form, click on $\boxed{\text{Record}}$.

4. Select $\boxed{\text{New}}$.

5. Type the words **Matrix Master Report** in the report number box.

6. Go to the Main Menu.

7. Start an inspection to verify that the Matrix Master Report has been restored.

The Buyer or Seller agents' information is not correctly crossing over to the order form using automatic lookup.

This normally occurs after importing contacts. To renumber the

Agents Contact Number:

1. Click on VIEW AS LIST

2. Select any contact.

3. Click in this Contact Number 's Contact Code box. (Look for numbers such as CT101, CT102, etc.)

4. From Upper Tool Bar click Records

5. Click Replace.

6. Click on the dot for "Replace with Serial Numbers"

7. Type a number (with or without letters)

8. Click Replace.

All contacts will be renumbered.

Digital Photography

A picture can be worth a thousand words. Digital photography can help the inspector clarify conditions found during the inspection. Digital photographs are just a few clicks away.

T he InspecTrix Pro Inspection Program allows the use of any of a large number of digital cameras available to the inspector. Non-digital cameras may be used when photos are processed through a third party. The InspecTrix Pro Digital Photography pages accept a large array of photo/graphics formats including .BMP, .JPG, and others.

Using the Photography Pages

Importing Photographs

To import photographs into the thumbnail page:

1. Click on the ☐ PHOTO ☐ button. This will take you to the thumbnail page in the program.

2. Select one of the 36 spaces available on the page. Click once inside of the square.

3. Click on the ☐ Insert Photo ☐ button.

4. Go to the camera, folder or disk that contains the photograph you want.

5. Select the photograph you wish to insert and click ☐Open☐ .

Adding Comments to the Thumbnail Page

The user may add or delete comments in the small box beneath each thumbnail photograph contained in the thumbnail page. These

comments will automatically transfer to the appropriate pictures page text box.

Managing the Thumbnail Page

You may move or delete photographs contained in the thumbnail page.

<u>To move a photograph</u>: Place the cursor over the image, press and hold the left button and drag the image to a new location.

<u>To delete a photograph</u>: Place the cursor over the image. Press left button once to highlight the image, and press the **Delete** key on the keyboard.

Printing

InspecTrix Pro allows the printing of complete reports, single pages, or any combination the user may desire.

T he InspecTrix Pro program allows many printing options for the inspector. The program will automatically use the printer(s) assigned by Windows. Any time the print command is used, there is a menu that appears which lists the printer. If the printer listed is not the printer you intend to use, you must update the default printer for FileMaker/InspecTrix Pro. Please refer to the Technical Data Chapter of this manual.

Single Page Printing

You can print any single page of InspecTrix from that page itself. If you click on the **Print** icon throughout the program, that will print the current page you are on. If there is something you want to print that does not have an icon, you can select **Print** under the **File** menu.

Printing a Matrix Forms Report:

1. Click on the Print Report button on the **Main Menu.**

2. Verify the report number at the top of the page.

3. Select those pages you wish to print.

4. Select the number of copies you wish to print.

Printing Letters:

The information you need for your letters, such as address and references, are pulled from either the Order Form or the Contact Manager.

To send a letter to someone, who was involved with an inspection, go to that inspection (See **Find Inspection**). Once the inspection and client are selected click on the **Letters** button from the **Main Menu**.

Printing Labels or Envelopes:

To do this, you simply go to the section in which you wrote the letter from either the Main Menu or the **Contact Manager**).

From the **Contact Manager:**

1. Click the Letter button.

2. You will go to the letter for the current contact.

From the **Main Menu:**

1. Click on the Letters button.

2. Select Labels or Envelopes .

3. Select Print .

Print Stoppages

Printing problems are often a result of many co-existing problems. Since InspecTrix Pro reports print as *high definition* graphics, there is a considerable amount of memory used simply to run the print commands. If there are multiple programs running on the computer at the same time, there can be a memory conflict. This is usually accompanied by an error or illegal operation message.

To verify printer settings:

1. Click **Start.**

2. Click **Settings.**

3. Click **Printers**.

4. Double click of the printer icon that matches your printer. This will bring up a status window for your printer. If there are problems with the windows settings, the drivers, or the printer itself, refer to your Windows and printer manuals for information on setting up or re-installing the printer.

To verify computer capabilities (Windows 98, other operating systems are similar):

1. To check what system memory is available go to the "My Computer" icon on the desktop.

2. Right click and select Properties.

3. Select the performance tab.

4. This screen will show you your Physical RAM size and/or a percentage of RAM in use or remaining. (This may be called *System Resources*). The percentage of RAM not being used (percentage free) often has a direct effect on printing among other issues. **RAM free percentages below 70% are considered marginal for printing**.

5. If free resources are below 70% please shut down extra programs running in the background.

To verify what programs are running in background (Windows 98, other operating systems are similar):

1. To see what programs are running depress the **Ctrl, Alt** and **Delete** Keys once. The **Close Program** screen will appear.

2. If there are programs running that are not required at this time, close them and try printing again.

Templates

Templates are an important tool for inspectors who intend to report on sub-divisions, commercial buildings and other repetitive tasks

T emplates allow the inspector to create a common type inspection and then to use this as a basis for any inspections in the future that match the characteristics. Users may create their own templates following the instructions below.

Making a Template

1. Create an inspection report from which you intend to create a template. DO NOT USE AN EXISTING INSPECTION. It is helpful to use a descriptive name for the template (i.e.: Master, 3br2ba, or the name of the subdivision or commercial structure).

2. Go to the Order Form for that inspection.

3. Click on the | Click to Make Template | button.

4. Enter the information for this template.

Using a Template

Matrix Templates:

1. At the Main Menu select Start a New Inspection.

2. At the next screen, select the Templates List button.

3. At the Templates list screen, select the template you wish to use.

4. Enter a new report number at the Order Form.

Importing and Exporting Information

The InspecTrix Pro Inspection Program allows the importation and export of files between different computers. Files may also be archived on floppy disks or other storage systems.

T he InspecTrix Pro allows for the import and export of Matrix single reports, groups of reports and total available reports. Contacts, libraries and client information may also be transferred between units.

Overview

The Import and Export commands allow the transfer information between computers without the need to overwrite files. Since no files are being overwritten, there is a reduced chance of losing information. Reports may be exported from one unit and imported into another. This allows the transfer of information between laptop and desktop computers. Import/Export differs from Backup in that the act of Exporting/Importing transfers only information while Backup handles both the information and the basic program.

Note:

Extensive changes to the Matrix forms occurred with the implementation of the new ASHI 2000 standards. The new ASHI standards were introduced with InspecTrix Pro 2000, effective 1 January 2000. Due to the scope of changes to the forms, importing inspections created in InspecTrix Pro v7.01 or older is

not recommended. Data imported from older versions will not transfer into the proper fields in the new version.

Single Report Exporting

1. From the Main Menu select Find Inspection

2. Find the inspection you wish to export. Go to the Order Form.

3. Click the Export Button at the top of the screen.

4. At the next screen, select a destination for the file [i.e., **"a:\"** or **"3 ½ floppy b:\"**]

5. Select a name for the record that you will be exporting.

6. Click | Save | .

7. After you have clicked save, you will come to a **Specify Field for Export** screen.

8. Ensure **Character Set** window in the lower left-hand corner displays | Windows (ANSI) | .

9. Ensure that | Format Output using current layout | is also selected.

10. Select the button | Move All | .

11. Verify that the data in the left main **(Current file)** window matches the data in the right main **(Field Order)** window.

12. Click on the | Export | button.

Single Report Importing (Matrix)

To import a single inspection (if an Order form already exists):

1. If an order form already exists for this inspection, go to the Main Menu. Select Find Inspection.

2. Find the inspection you wish to import to. Go to the Order Form.

3. Click the | Import | Button at the top of the screen

4. When you get to this screen, find the file that you want to import and select ☐Open

5. On the Import Field Mapping screen, go to the upper right and select ☐view by matching name

6. Be sure that the ☐Replace current set☐ button in the lower left-hand corner is selected.

7. Click the ☐Import☐ button

8. At the Import Options screen ensure the "Perform Auto Enter…" selection is **not** checked. Ensure "Keeping then in their original records" is selected.

9. Click "OK".

To import a single inspection (if an Order form does not already exists):

1. Go to the Main Menu.

2. Go to the ☐File☐ Menu in the upper left of the screen.

3. Click on ☐File☐.

4. Select ☐Import/Export☐.

5. Select ☐Import Records☐.

6. When you get to this screen, find the file that you want to import and select ☐Open☐.

7. On the Import Field Mapping screen, go to the upper right and select ☐view by: matching name☐

8. Be sure that the ☐Add new records☐ button in the lower left-hand corner is selected.

9. Click the Import button

10. At the Import Options screen ensure the "Perform Auto Enter…" selection is **not** checked. Ensure "Keeping then in their original records" is selected

11. Click "OK".

Bulk Exporting

Bulk exporting may be used to transfer multiple records. If the Find All command is used prior to export all the records within the file will be exported. If a find command is executed the records found will be transferred.

1. Execute the Find All or Find commands as applicable.

2. Go to the | File | Menu in the upper left of the screen.

3. Click on | File |.

4. Select | Import/Export |.

5. Select | Export Records |

6. Select a destination for the file [i.e., **"a:\"** or **"3 ½ floppy b:\"**]

7. Select a name for the record that you will be exporting.

8. Click | Save |.

9. After you have saved, you will come to a **Specify Field for Export** screen.

10. Ensure **Character Set** window in the lower left hand corner displays | Windows (ANSI) |.

11. Ensure that | Format Output using current layout | is also selected.

12. Select the button | Move All |.

13. Verify that the data in the left main **(Current file)** window matches the data in the right main **(Field Order)** window.

14. Click on the | Export | button.

Bulk Importing

To import another FileMaker Pro file into your database:

1. Go to the | File | Menu in the upper left of the screen.

2. Click on | File |.

3. Select Import/Export .

4. Select Import Records .

5. When you get to this screen, find the file that you want to import and select Open

6. On the Import Field Mapping screen, go to the upper right and select view by: matching name

7. Be sure that the Add new records button in the lower left-hand corner is selected.

8. Click the Import button

9. At the Import Options screen ensure the "Perform Auto Enter…" selection is **not** checked. Also, ensure "Keeping then in their original records" is selected.

10. Click "OK".

11. Verify all records transferred.

Faxing the Matrix Report

Faxing allows the quick transfer of information from the inspector to clients and agents.

The InspecTrix Pro Inspection Program allows the use third party faxing software. The inspector may now fax the Matrix pages directly to clients and others that require the report.

NOTE:

The Fax function is not intended as a substitute for the printed report.

NOTE:

Faxing accuracy is dependent on the document to be faxed, the software used to fax, and the receiving unit's ability to translate the information. If there is incompatibility between any of the software or hardware, words may be chopped/missing/misarranged within the fax.

NOTE:

Due to these differences, not all Faxes will be accurate representations of the printed report. It is highly recommended that Inspectors test their faxing capability before relying on the fax option to transfer information.

NOTE:

The steps listed below apply to third party fax software such as WinFax© that allow the creation of faxes from the program print screens.

Matrix FAXING

There are two methods used to send the Matrix pages with the third party Faxing software. The method used depends on the number of pages the inspector wishes to fax.

<u>NOTE:</u>

Not all of these steps will apply to all third party faxing software.

To fax single Matrix pages:

1. Select the page you wish to print.

2. Click the print button on the right hand button bar.

3. At the Print screen, select the fax software in place of the printer name.

4. Click "OK" or "Continue" as applicable.

5. The remaining steps depend on the inspector's faxing software.

To fax the whole Matrix report:

<u>NOTE:</u>

The report will fax in two separate sections

1. Click on the ⬚ Print Report ⬚ button on the Main Menu.

2. Verify the report number at the top of the page.

3. Select the first FAX / E-Mail button.

4. At the Print screen, select the fax software in place of the printer name.

5. Click "OK" or "Continue" as applicable.

6. The remaining steps depend on the inspector's faxing software.

7. Once the first fax is sent click on the second FAX / E-Mail button.

8. Repeat steps 4 through 6 for the second FAX / E-Mail button.

E-Mailing a Report

*E-Mailing allows the quick transfer of information
from the inspector to clients and agents.*

The InspecTrix Pro Inspection Program allows the use third party E-Mailing software. The inspector may now E-Mail Matrix and/or Narrative inspection reports directly to clients and others that require the report.

Currently two methods will produce an e-mail attachment that is viewable by the client. One is through ADOBE. ADOBE allows the creation of PDF files that the client can open and print. The other option is through third party software such as HotSend© or Efax Messenger

NOTE:

The E-Mail function is not intended as a substitute for the printed report.

NOTE:

The steps listed below apply to third party E-Mail software such as HotSend© or Efax Messenger© that allow the creation of e-mail from the program print screens.

NOTE:

E-mail accuracy is dependent on the software used to E-Mail, the Internet Service Provider (ISP), and the receiving unit's ability to translate the information. If there is incompatibility between any of the software or hardware there is a possibility that the E-Mail may not be usable at the receiving end.

NOTE:

Due to differences between E-Mail software, it is highly recommended that Inspectors test their E-Mail capability before relying on the fax option to transfer information.

Matrix E-Mail

There are two methods used to send the Matrix pages with the third party e-mail software. The method used depends on the number of pages the inspector wishes to e-mail. For users of ADOBE, please refer to your ADOBE documentation for guidance.

NOTE:

Not all of these steps will apply to all third party e-mail software.

To e-mail Matrix single pages:

1. Select the page you wish to print.

2. Click the print button on the right hand button bar.

3. At the Print screen, select the E-Mail software in place of the printer name.

4. Click "OK" or "Continue" as applicable.

5. The remaining steps depend on the inspector's E-Mail software.

To E-Mail the whole Matrix report:

NOTE:

The report will E-Mail in multiple sections unless combined through the user's email program.

1. Click on the Print Report button on the Main Menu.

2. Verify the report number at the top of the page.

3. Select the first FAX / e-mail button.

4. At the Print screen, select the E-Mail software in place of the printer name.

5. Click "OK" or "Continue" as applicable.

6. The remaining steps depend on the inspector's E-Mail software.

7. Once the first E-Mail is sent click on the second FAX / e-mail button.

8. Repeat steps 4 through 6.

Recovering
Damaged Files

The InspecTrix Pro Inspection Program allows for
easy recovery and repair of damaged files.

F iles can be damaged due to unintended shutdown of either the InspecTrix Pro program or the Windows program. Mechanical or hardware failure (i.e. power surges, power spikes, and power loss or brownout conditions) may also cause files to be damaged. The first indication of trouble is often a screen that appears when the InspecTrix Pro icon is actuated. To recover files:

1. Identify which file is damaged (i.e.: ITA.DUO). This information is seen when the damaged file Note: If your computer is not set to show file extensions, you may not see the extension .DUO at the end of the damaged file. Please refer to your Windows Help screen for information on how to set your computer to view file extensions.

2. Close the program.

3. Press the left **Shift** key and the left **Control** Key on your keyboard.

4. While holding down both keys, double Click the **InspecTrix Pro** icon.

5. The **"Open damaged file"** pop up screen will appear.

<u>NOTE</u>

If the **"Open damaged file"** does not appear, close the program and retry using the other set of **Shift** and **Control** Keys. Ensure these keys are held until the **"Open damaged file" screen** appears.

6. Select (single click on) the file you want to recover. Normally the InspecTrix files reside in the "ITA" folder on the "C" drive of your computer (i.e., C:\ITA 2003, or C:\ITA 2004, etc.)

7. Click on the Open button (sample file: ITA.DUO).

8. The file will automatically recover. You will see the message telling you the status of the recovery process. When the process is complete, you will see the message that displays the success of recovery.

9. The **"Open damaged file"** pop up screen will reappear.

10. Click on Cancel.

11. The InspecTrix Pro program will now start.