  

InspecTrack™ Notebook Edition

Connecting Citizens to Digital Government

Mobile Inspection System

User's Manual

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Getting Started 1

CHAPTER

Welcome to the InspecTrack™ Mobile Inspection System–the mobile inspection system used by Community Development agencies. InspecTrack provides an improved method of data collection and delivery in the field, so it reduces the time you spend in the office and in keeping track of endless paper forms. InspecTrack uses data synchronization technology to provide updated and accurate information for inspections in the field.

The InspecTrack system is comprised of the InspecTrack server and the InspecTrack Notebook Edition. Notebook Edition is installed on your field computer. It's what you will use on a daily basis. After you enter inspection results into your field computer, Notebook Edition updates the InspecTrack server, which in turn synchronizes with the permitting database. This manual is your guide to using InspecTrack's Notebook Edition.

How Do I Use this Guide?

Stuff it in your coat pocket, cram it in the door of your truck, or set it to sun on your dashboard. This guide was designed to travel alongside you and be used as a quick reference.

Where Do I Start?

The beginning–unless you're opening this to look for a specific task. Chapters 2 through 6 include step-by-step instructions describing common tasks that you will perform while using Notebook Edition. Appendixes A, B, C, and D provide information on generating reports, as well as optional functionality that might be available in Notebook Edition (depending on how your jurisdiction has configured it). Appendix E serves as a reference guide; it contains in-depth information about Notebook Edition functions. Use this section to learn about different options available in each Notebook Edition view.

For a quick start, turn to Chapter 4, Performing Inspections. The tasks in Chapter 4 were arranged in the order in which you might perform an inspection during an average day, from start to finish.

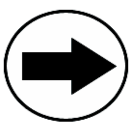
Format Conventions Used in this Manual

Format

In this manual, words in bold represent Notebook Edition buttons or fields. For example, **OK** denotes the OK button.

A black exclamation point indicates a note. Notes discuss items of interest, provide helpful hints for completing tasks, or provide additional background information on a process.

Red exclamation points serve as warnings, detailing potential problems you may run into and providing additional information regarding proper procedure.



Sometimes there are two or three ways to accomplish one task. The shortcut arrow points to Notebook Edition shortcuts.

Finding Your Way Around

2

CHAPTER

This portion of the manual serves as a map for finding your way around InspecTrack Notebook Edition. The first part of this section describes the screen that you see when using Notebook Edition. Task bars and their related views are detailed in the last part of this chapter, starting with the Route Task bar (see "Route Task Bar" on page 9). For additional information about each Notebook Edition view, please see Appendix E, Reference.

Becoming Familiar with Notebook Edition

The Notebook Edition screen consists of a display window, task bar, status bar and the navigation menu bar (see Figure 2-1). Some views and task items will be unavailable if a permit is not selected, but the status and navigation menu bars are always visible. Each section of the Notebook Edition screen is described below.

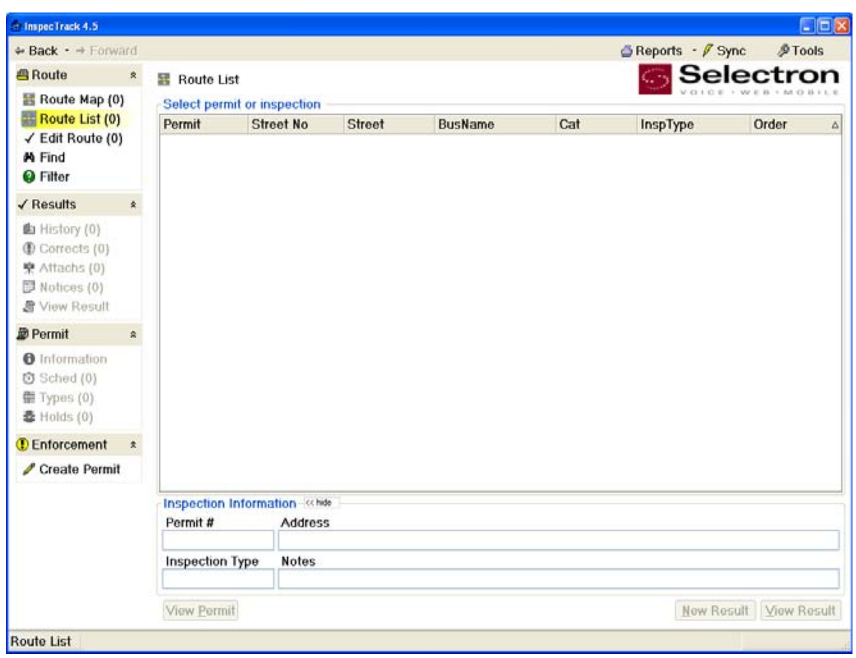


Figure 2-1 Notebook Edition interface with the Route List view shown

Display Window

The contents of the display window change according to the selected view. The display window takes up the majority of the Notebook Edition screen. Task bars and views are discussed in-depth later in this section (see "Route Task Bar" on page 9).

Task Bars

The items on the task bar remain constant, although some items may be unavailable depending on the selected view. The task bar is divided into three parts: Route, Results, and Permit. A fourth task bar (Enforcement) displays when InspecTrack's Code Enforcement module has been set-up[1]. For detailed information about each of the task items go to "Route Task Bar" on page 9.

To switch from one task item to another, simply select the task item that you want to view. The task item highlighted in yellow is the active view; the active view is also displayed in the Notebook Edition status bar. Figure 2-2 displays the task bars with the Route List task item selected.

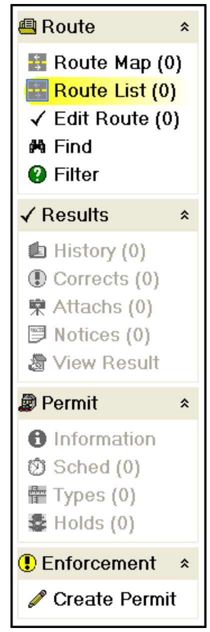


Figure 2-2 Task Bars

Status Bar

Using the status bar, you can always double-check your current view, as well as the currently selected permit. If an inspection is selected, it will be displayed also.

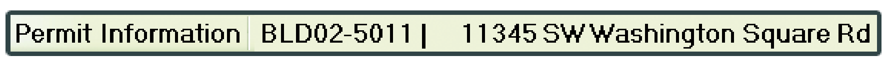


Figure 2-3 Status Bar

Navigation Menu Bar

Within Notebook Edition, there are five buttons that are always visible regardless of the displayed view. The Back, Forward, Reports, Sync and Tools buttons are located on the navigation menu bar (shown in Figure 2-4).

Figure 2-4 Notebook Edition navigation menu bar

You can use the Back and Forward buttons to switch back and forth between displays. These buttons are helpful if you accidently navigate to another screen; however, they do not un-do changes. The drop-down arrows to the right of these buttons provide a list of up to the last 10 screens that you viewed in either direction.

1. If the Enforcement task bar is grayed out, or is not visible, the **Code Enforcement** module is not available and has not been purchased by your jurisdiction.

Use the Report button to access the Route Listing, Activity Listing, and Inspection Summary reports. See Appendix A, Using Reports, for more information on running these reports.

Use the Sync button to start synchronization between Notebook Edition and the InspecTrack server. See Chapter 6, Updating Notebook Edition, for more information about synchronization and use of the Sync button.

With the Tools button you can access InspecTrack tools, a series of screens that let you control some Notebook Edition settings. See "Tools Window" on page 7 for additional information on the options available with this button.

Tools Window

InspecTrack tools are accessed via the Tools button on the Navigation menu bar. The Tools window contains three tabs: Settings, Sync and About.

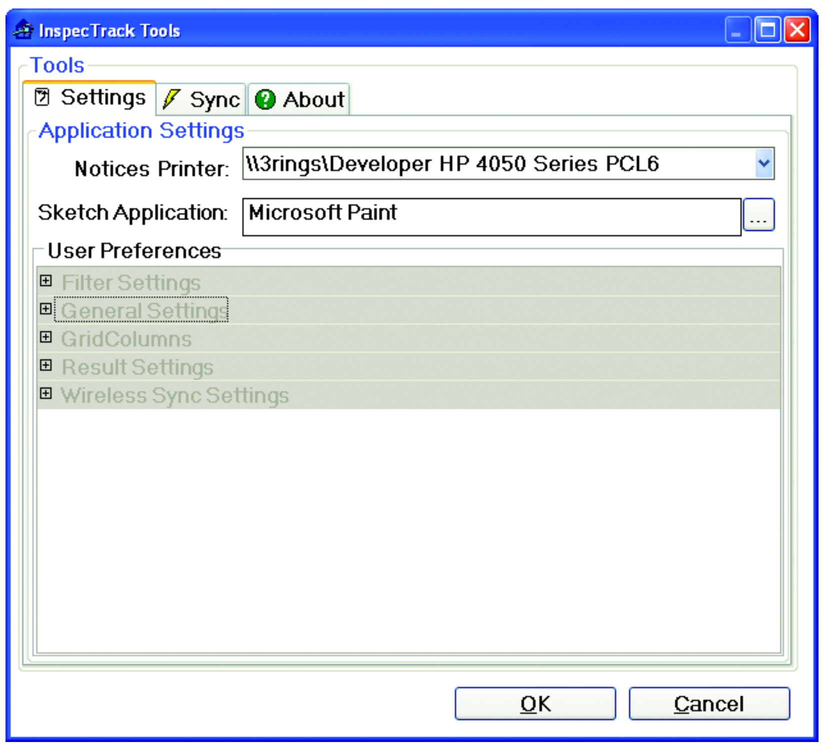


Figure 2-5 Tools window with the Settings tab displayed

Use the Settings tab to set your default printer and, optionally, choose your digital sketch program. Your computer's default printer is the default printer in Notebook Edition. Using the Notices Printer drop-down list, you can choose to have your notices and reports sent to another printer. Use the Sketch Application browser to select the program you wish to use to create digital sketches[1].

1. The Sketch Application browser is only available if your jurisdiction has purchased InspecTrack's **Digital Sketches** module.

The Sync tab lets you figure out which remote server you will connect to. The InspecTrack server should be listed in the remote server field. Your InspecTrack Administrator will configure this for you. See Chapter 6, Updating Notebook Edition, for more information about the settings on this tab.

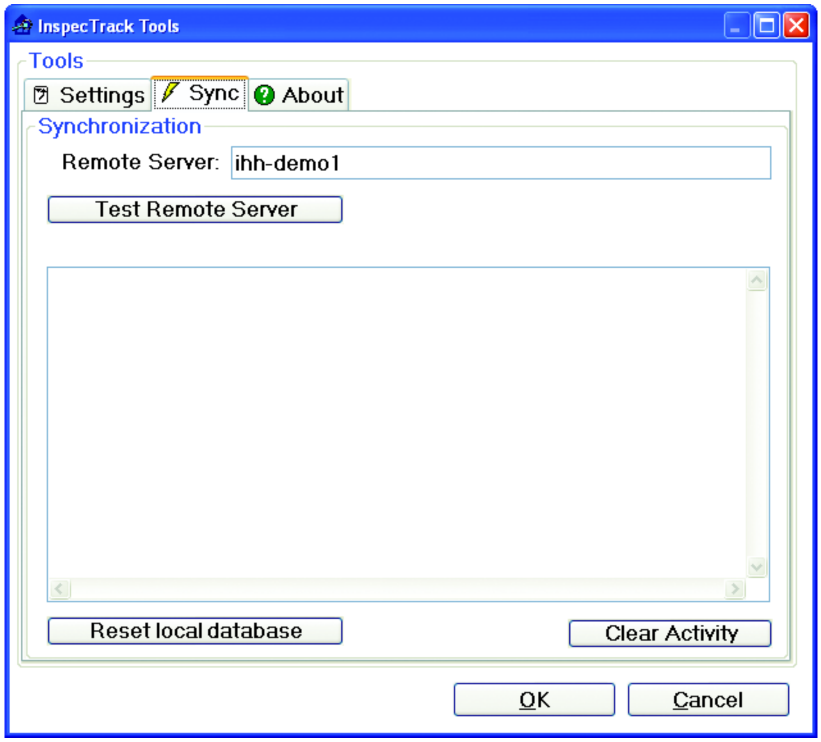


Figure 2-6 Tools menu with Sync tab displayed

The About tab provides information about Notebook Edition. You can also check for updates to Notebook Edition here. See Chapter 6, Updating Notebook Edition, for more information about the settings on this tab.

Telling the Difference between Permits and Inspections

Both permits and inspections are visible in Notebook Edition. Most views display either permits, or, inspections related to a selected permit. In the Route List view, however, both are visible at the same time. Permits and inspections are listed by permit number; inspections are listed underneath the permit number. In Figure 2-7 on page 9, the permit number is highlighted, with all associated inspections listed beneath.

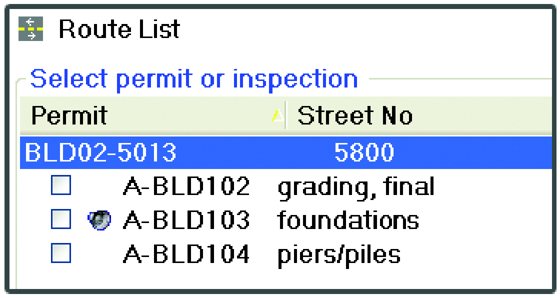


Figure 2-7 Permits and inspections identified within the Route List view

Route Task Bar

Using the items in this task bar, you can specify the permits that you want to include in your route, and can customize your route accordingly. From the Route task bar you can navigate to different views that let you work with permits at the route level. For detailed information about permits or inspections, use the Results and Permit task bars.

Route Map

The Route Map task item displays a map showing points that correspond to all inspections listed on the Route List view[1]. From the Route Map view you can change the order of your route, see detailed street information for each inspection site, post inspection results, and listen to contractor messages[2]. The Route Map view does not provide driving instructions to each inspection site

Route List

Selecting the Route List task item displays the permits that are currently part of your route. Pending inspections are listed under the permit number. Double-clicking on an inspection will take you to the Inspection Results Wizard.

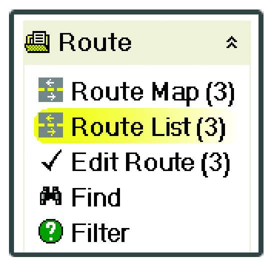


Figure 2-8 Route Task Bar

Edit Route

The Edit Route view displays all inspections currently listed in the Route List view. Using this option you can search, order, add and remove inspections from your route.

1. The Route Map task item is only available if your jurisdiction has purchased the **Enhanced RouteBuilder with Maps** module for InspecTrack.
2. Contractor messages are only available if your jurisdiction is also using the **VoicePermits** IVR system.

Find

Using Find is like fishing with a type of bait that only a single kind of fish will eat. You will catch all fish (inspections) that eat that type of bait (match the criteria). With Find, you can search for inspections by permit number, area, street number, street, scheduled time, type, or description. In addition, you can catch (or find) a single inspection if you have the full permit number. After searching, you can save the results of your search to update your route information.

Filter

Where Find is like fishing with one type of bait, Filter is like a fishing net; it allows you to catch fish (or inspections) that match several criteria, at one time. The Filter option is designed to assist your search for groups of inspections based on scheduled dates, permit types, permit status, permit areas, and inspection types. In addition, you can save a default filter criteria to use on a daily basis.

Results Task Bar

Using the Results task bar you can work with the inspections of the currently selected permit.

History

This task item displays the inspections that have been completed for a selected permit. The number in parentheses provides a quick reference to the number of completed inspections.

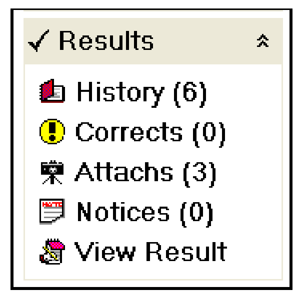


Figure 2-9 Results Task Bar

Corrections (Corrects)

The Correction view provides information about all inspection corrections associated with this permit, but can be set to display corrections for failed inspections only. The number in parentheses *only* represents the number of corrections that need to be made before an inspection can be passed.

Attachments (Attachs)

Any digital photos or sketches attached to a selected permit are displayed in the Attachments view. The number in parentheses indicates the number of attachments associated with a particular permit. From this task item you can also add, delete, view, edit, and print attachments for a selected permit[1]. This task item is only available if your jurisdiction has implemented the Digital Photo and/or Digital Sketch module.

1. This task item is only available if your jurisdiction has implemented the **Digital Photo** and/or **Digital Sketch** module(s).

Notices
Any Correction or Inspection notices associated with the selected permit are displayed in a list in the Notices view; they can also be viewed in an easy-to-read report format. The number in parentheses represents the number of notices (of either type) that are associated with the selected permit. Correction Notices only include information about failing corrections while Inspection Notices provide information about all corrections associated with a particular permit.

View Result
The View Result task item opens the Inspection Results Wizard through which you can see both the inspection details and any corresponding corrections. Through this wizard you can add new, or update existing, results or corrections. You can also access the Inspection Results Wizard by using the View Result button.

Permit Task Bar
You can use the Permit task bar to view information about the permit currently highlighted in the Route List view.

Information
The Information task item is a reference point and contains general information about the permit, as well as contact information for the people associated with the permit and parcel information.

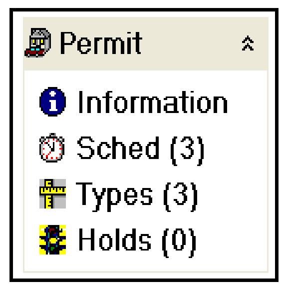


Figure 2-10 Permit Information Task Bar

Scheduled Inspections (Sched)
The Scheduled Inspections task item displays the number of inspections that are currently scheduled for a particular permit, with the number in parentheses serving as a quick reference. New inspections can be scheduled from this view.

Types
The Types view provides a list of all of the different types of inspections related to a particular permit. The number in parentheses serves a quick reference for the number of inspection types associated with the selected permit.

Note that each inspection type is listed only once. For example, if two drywall inspections and one final inspection are scheduled, "(2)" will appear next to the Types task item because there are only two types of inspections (drywall and final) associated with the permit.

Caution! If an inspection type is deleted from the Types view, all inspections of that type associated with the selected permit will be deleted. In other words, and using the example above, if you delete “drywall” from the Types view, the two scheduled drywall inspections will be deleted (the quick reference number would change to “(1)”). You can only delete an inspection type that has not been synchronized.

Holds

The Holds task item displays the number of locks, holds, notices, or comments associated with a selected permit, with the number in parentheses serving as a quick reference. Depending on the options selected, a Holds window will pop-up if you add to or view results of a permit associated with a lock, hold, notice, or comment.

Enforcement Task Bar

You can use the Enforcement task bar to address unexpected code infractions you may encounter during your work day[1].

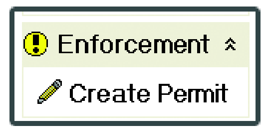


Figure 2-11 Enforcement Task Bar

Create Permit

The Create Permit task item allows you to create a new permit, if you happen to see an unexpected violation. After creating a new permit, you can also immediately post an inspection result. See Appendix D, Code Enforcement, for more information.

1. The Enforcement task bar displays only if your jurisdiction has purchased Inspec-Track’s **Code Enforcement** module.

Building a Route

3

CHAPTER

Throughout the day you can use Notebook Edition to record inspection information, such as results, corrections (or code violations), and inspection-related notices. The easiest way to track and update inspections is to first build a route. This chapter focuses on how to build your route using Notebook Edition's Find and Filter options, as well as how to edit the route once it has been created.

Building a Route

At the beginning of the day, you need to build a route. Use either the Filter or Find options to select the inspections you will be working with, and then use the Edit Route view to fine tune your route. After building a route, your inspections will be easily accessible via the Route List view.

Using the Notebook Edition Filter

Use the Notebook Edition filter to search for groups of inspections based on scheduled dates, assigned inspector, permit types, permit status, permit areas and inspection types. You can apply a filter based on one field, all fields, or any combination of fields that you want. The more filters that you apply, the more that you narrow down your search.

To access the filter options, simply select Filter from the Route task bar and the Filter window will display (Figure 3-1 on page 16).

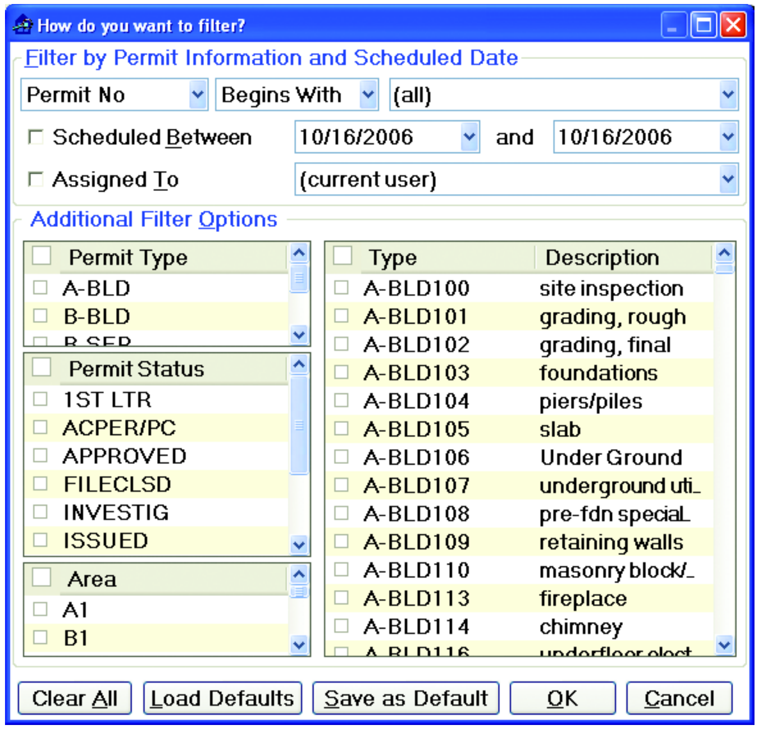


Figure 3-1 Filter window

This section lists all filtering options separately, but you may wish to use any combination of filtering options to locate permits and inspections.

Filter by Category

1. Use the upper left drop-down list to enter the filter category. By default, the category is set as Permit No.
2. Use the upper middle drop-down list to enter a filter criteria. By default, the criteria is Begins With; it can be changed to Ends With, Contains or Matches.
3. Enter a search string in the upper right box. You can use the drop-down list to select a pre-defined string, or you can type your own search string into the box. By default, the string is set as (all). Using (all) will result in more permits being found.

A search string is a set of characters (letters or numbers) that you would like Notebook Edition to find. For example, you may want to narrow down your search and only look for permits issued to addresses on Main Street. In the upper left drop-down list, select Street. In the middle drop-down list, select Contains. Then type Main in the search string box. Figure 3-2 on page 17 shows how the top of the filter windows would look.

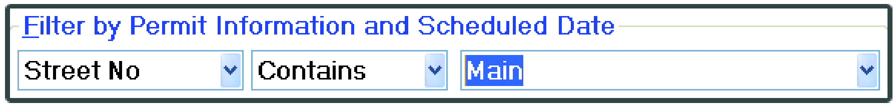


Figure 3-2 Filter window showing filter category, criteria, and search string

4. After setting the search criteria, see “Applying Filters” on page 18 for instructions on adding inspections to your route.

Filter by Date

1. To filter based on a date, or range of dates, select the Scheduled Between check box.
2. Use the drop-down calendars to enter a date, or date range.

To search for inspections scheduled for today, select Today on both calendars. The current date will appear in the date fields. An example is shown in Figure 3-3.

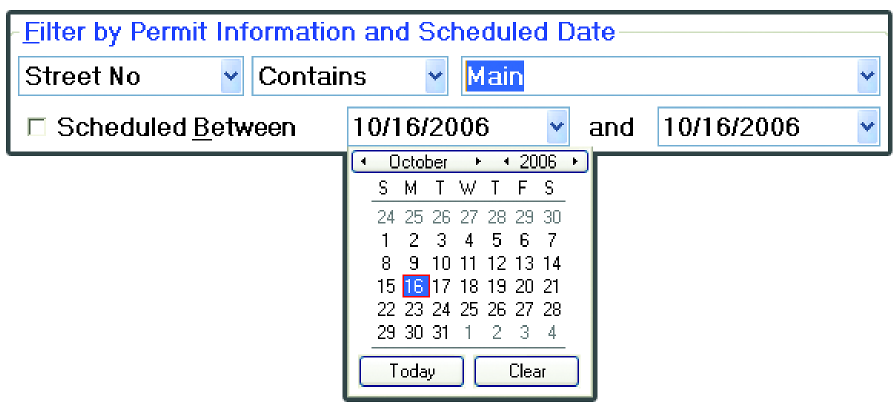


Figure 3-3 Filter window with a date range entered

3. After setting filters, see “Applying Filters” on page 18 for instructions on adding inspections to your route.

Filter by Inspector

1. Select the Assigned To check box to filter by specific inspectors.
2. Select the inspector from the drop down list.
3. After setting filters, see “Applying Filters” on page 18 for instructions on adding inspections to your route.

Filter by Permit Type

1. Under Permit Type, select the permit types you want to include in the filter. To include all permit types, select the Permit Type check box.
2. After setting filters, see "Applying Filters" on page 18 for instructions on adding inspections to your route.

Filter by Permit Status

1. Under Permit Status, select the statuses you want to include in the filter. To include all, click the Permit Status check box. If your jurisdiction does not use permit statuses, leave the check box blank.
2. After setting filters, see "Applying Filters" on page 18 for instructions on adding inspections to your route.

Filter by Permit Area

1. Under Area, select the permit areas you want to include in the filter. To include all, select the Area check box. If your jurisdiction does not use areas, leave the check box blank.
2. After setting filters, see "Applying Filters" on page 18 for instructions on adding inspections to your route.

Filter by Inspection Type

1. Under Type, select the inspection types you want to include in the filter.
2. After setting filters, see "Applying Filters" on page 18 for instructions on adding inspections to your route.

Applying Filters

When you apply filters, Notebook Edition displays all filter results, as well as the applied filters.

1. Click OK to search for permits using the filters you applied.
   Filter results are displayed (see Figure 3-4).

In Figure 3-4 the Filter Summary box displays the applied filters and all permits meeting the criteria are displayed below.

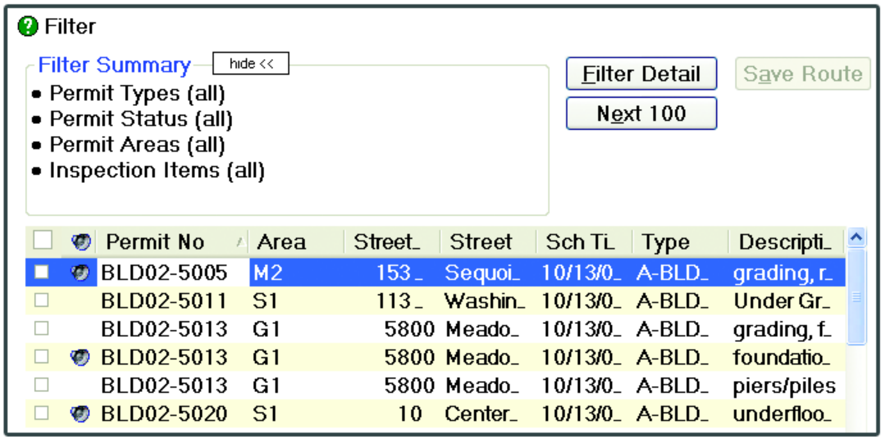


Figure 3-4 Filter Results

In general, when you select more filters, or select more check boxes, there will be fewer inspections displayed. To see more inspections, include more permit or inspection types. Also, changing the date range may expand or narrow the amount of permits that are found.

2. Click the check box next to the permit number to add a permit to your route.
3. Click Save Route.
   The Route List view opens. Newly routed permits are added to the Route List view (Figure 3-5).

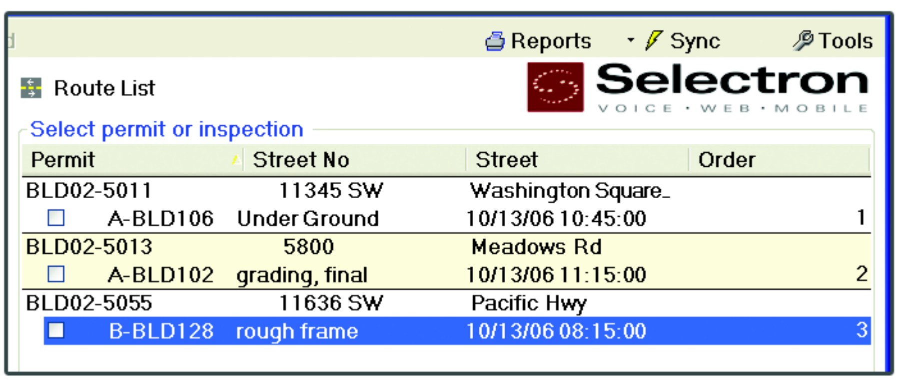


Figure 3-5 Route List view with newly routed permits

Using the Notebook Edition Find View

The Find view allows you to conduct a broad search, based on permit number, area, street number, street, scheduled date, type, and description. If you want to narrow down your search by applying filters, see "Using the Notebook Edition Filter" on page 15.

Add Permits to your Route

1. Select **Find** from the Route task bar.
   The Find view opens (Figure 3-6).

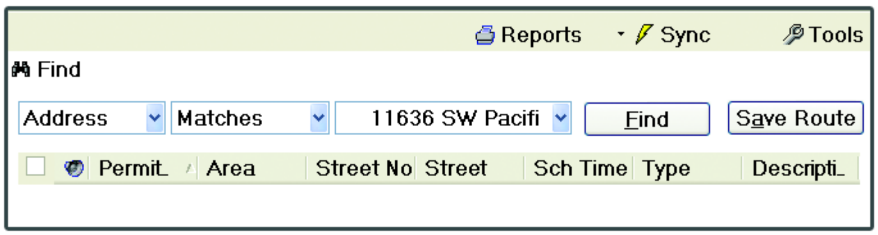


Figure 3-6 Notebook Edition Find view

2. Use the upper left drop-down list to enter the search category. The list defaults to Address.
3. Use the upper middle drop-down list to enter the search criteria. This can be changed to Begins With, Contains, or Matches.
4. Enter a search string in the upper right box. You can use the drop-down list to select a pre-defined string, or you can type your own search string into the box. By default, the string is set as All.
5. Click **Find**.
   All matching inspections will be displayed.
6. Select the check-box next to the permit to add an inspection to your route.
7. Click **Save Route**.

Editing A Route

After building a route, you may decide to remove an inspection or permit from the route, or you may want to change the order in which inspections are displayed in the Route List view. Use the Edit Route view to make these adjustments.

1. Click Edit Route from the Route task bar.
   The Edit Route view will open, as shown in Figure 3-7.

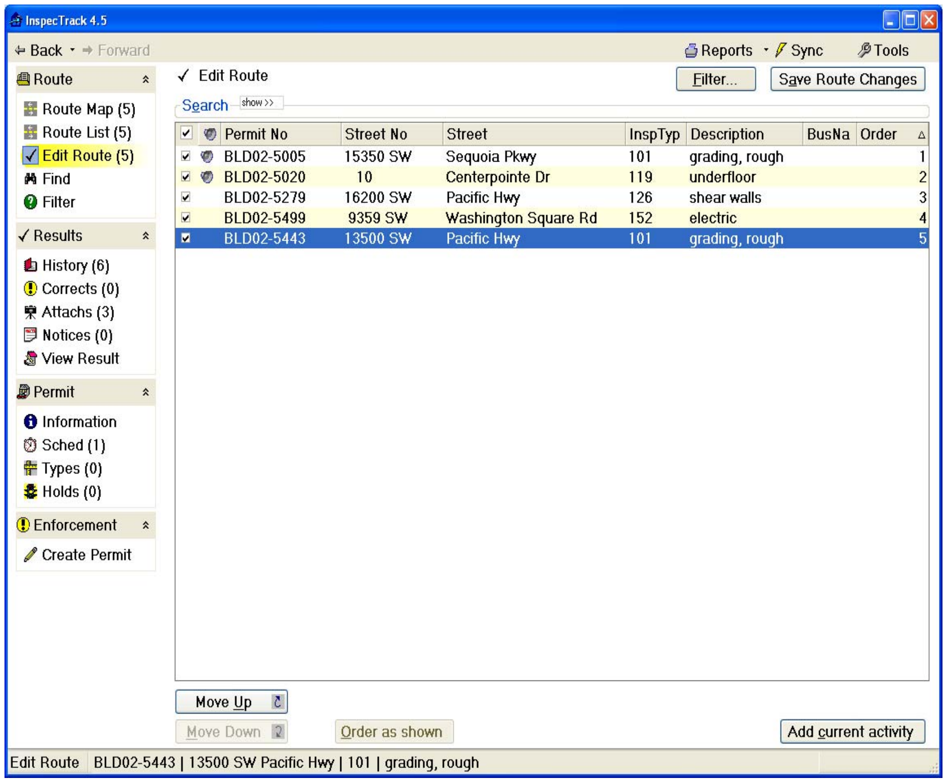


Figure 3-7 Edit Route view

2. To remove a permit from your route, de-select the check box next to the permit number.
3. Click Save Route Changes.
   The Route List view is displayed.

If you click on the Route List task item to return to the Route List view before saving changes, the Save Changes dialog box is displayed and you are asked to confirm route changes (Figure 3-8 on page 22).

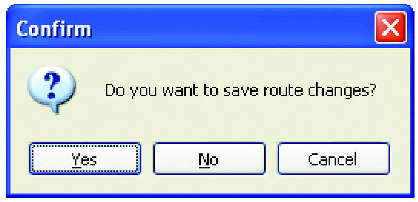


Figure 3-8 Save Route dialog box

Changing the Inspection Order of your Route

After adding permits to your route, you may want to reorder inspections so that they are listed in the order in which you plan to visit each inspection site. Or you may want the order to match the inspection priority. Use the Edit Route view to sort and reorder your inspections.

Changing the Inspection Order Manually

If you want to make minor changes to the order of your route, you can use the order buttons in the Edit Route view. Using the order buttons, you can move an inspection up or down the list to reflect how you want your route to be ordered.

1. Select Edit Route from the Route task bar.
   The Edit Route view opens.
2. To move an inspection towards the top of your list, select an inspection and click Move Up.
   The inspection moves one position closer to the first position on your route.
3. To move an inspection towards the bottom of your list, select an inspection and click Move Down.
   The inspection moves one position closer to the last position on your route.
4. Repeat steps 2 and 3, as necessary.

You can also 'drag and drop' each permit to its appropriate place in the list.

5. Click Save Route Changes to save the changes you have made to the route order.

If you click on the Route List task item to return to the Route List view before saving changes, the Save Changes dialog box is displayed and you are asked to confirm route changes (Figure 3-8).

Changing the Sort Order

Your route can be sorted by any column heading. For example, inspections in your route can be sorted by permit number, simply by clicking on the permit number column heading.

Click once on a column heading to sort in ascending order (1,2,3...). A second click on the same heading will sort that column in descending order (9,8,7...). When a view is sorted by column, an arrow is visible in the column heading. See Figure 3-9 and Figure 3-10.

Figure 3-9 Column sorted in ascending order

Figure 3-10 Column sorted in descending order

1. Select **Edit Route** from the Route task bar.
2. Click the **Permit No** column once.
   The route is sorted by permit numbers.
3. Click **Order as Shown**.
   The route is re-ordered to match the column sort order.

Performing Inspections

4

CHAPTER

Once you have created and configured a route, Notebook Edition allows you to record inspection information, such as results, corrections (or code violations), and inspection-related notices. This chapter covers all of the basic tasks that you can perform when recording inspection results in the field.

Entering Inspection Results

Once you have chosen an inspection from the Route List view you can enter results to record the outcome of the inspection (e.g., pass or fail). Additionally, you can record comments, duration and inspection date. In the event of a recurring or failed inspection, a reinspection date can also be entered.

Entering Inspection Results

1. Select an inspection from the Route List view, then click **New Result**.
   The Inspection Results Wizard opens (Figure 4-1 on page 25).

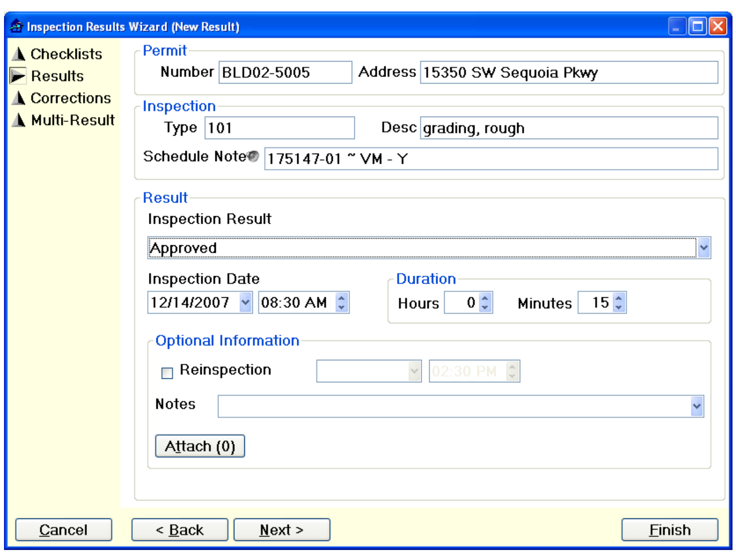


Figure 4-1 Entering new results in the Inspection Results Wizard

If the Inspection Results Wizard opens in 'Read Only' mode, it means that an inspection result has already been synchronized with the InspecTrack server and the original inspection result cannot be changed. Click New Result to enter an additional result.

2. Complete any required checklists. For more information on completing checklists, see "Completing Checklists" on page 39
3. Use the drop-down lists to enter inspection results, as well as any optional information such as the reinspection date or inspection notes.
4. To enter correction information, click Next.
   The Corrections window will open (see "Adding Corrections" on page 27 for additional information about corrections).
5. Click Finish to close the Inspection Results Wizard.
   The Route List view is visible and completed inspections are marked with a check mark, as shown in Figure 4-2 on page 26.

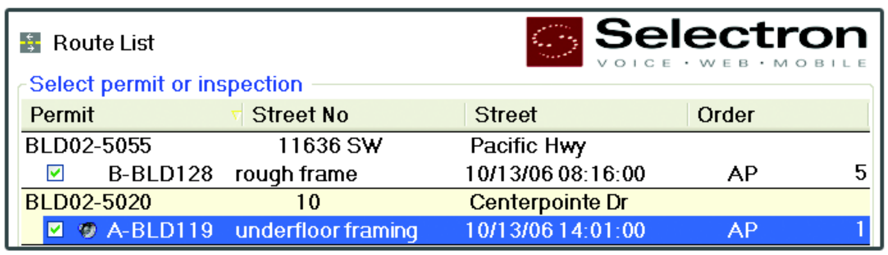


Figure 4-2 Route List view with two completed inspections

If you select a permit from the Route List, rather than an inspection, you will be prompted to choose an inspection associated with the permit.

Updating Inspection Results after Synchronization (Performing a Reinspection)

Once Notebook Edition has been synchronized with the InspecTrack server, inspection results cannot be changed. However, you can enter a new inspection result.

1. Select an inspection from the Route List view, then click New Result.
   The Inspection Results Wizard opens.
2. Use the Inspection Result drop-down lists to enter an updated inspection result.
3. In the Optional Information area you can enter a re-inspection date and any notes pertaining to the inspection.

4. To enter correction information, click **Next**.
   The Corrections window opens (see “Adding Corrections” on page 27 for additional information about corrections).
5. Click **Finish** to close the Inspection Results Wizard.
   The Route List view is visible and completed inspections are marked with a check mark.

Adding Corrections

In addition to entering the result of a failed inspection, you may wish to record the specific reasons for failure. By marking corrections, you can indicate the code and correction, as well as the location and any additional comments.

Adding Corrections

If you are in the middle of entering or updating an inspection result, and want to add a correction, skip ahead to step 3.

1. Select an inspection from the Route List view, then click **View Result**.
   The Inspection Results Wizard opens.
2. Complete any required checklists. For more information on completing checklists, see “Completing Checklists” on page 39.
3. Click **Next** to view the Corrections window (Figure 4-3).

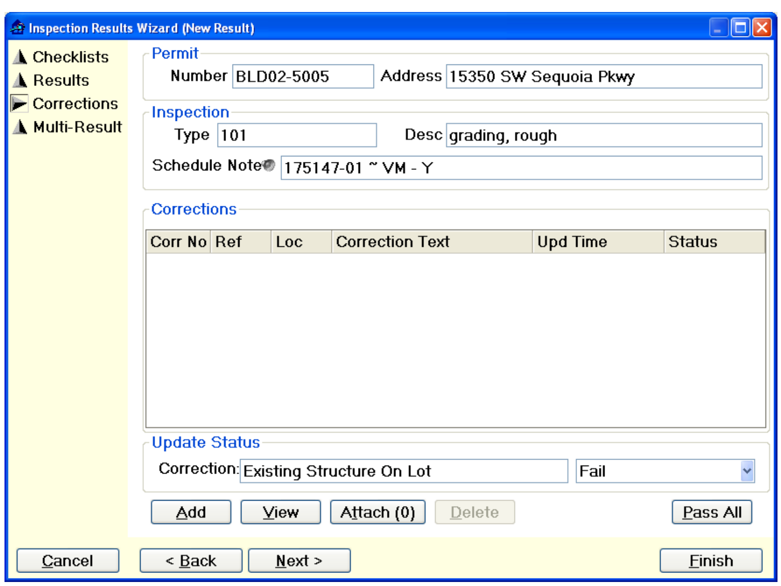


Figure 4-3 Corrections window in the Inspection Results Wizard

As illustrated in Figure 4-3, you can verify that you are entering inspection results for the correct permit and inspection by checking the permit and inspection information fields.

4. Click **Add**.
   The Edit Correction window opens (Figure 4-4).

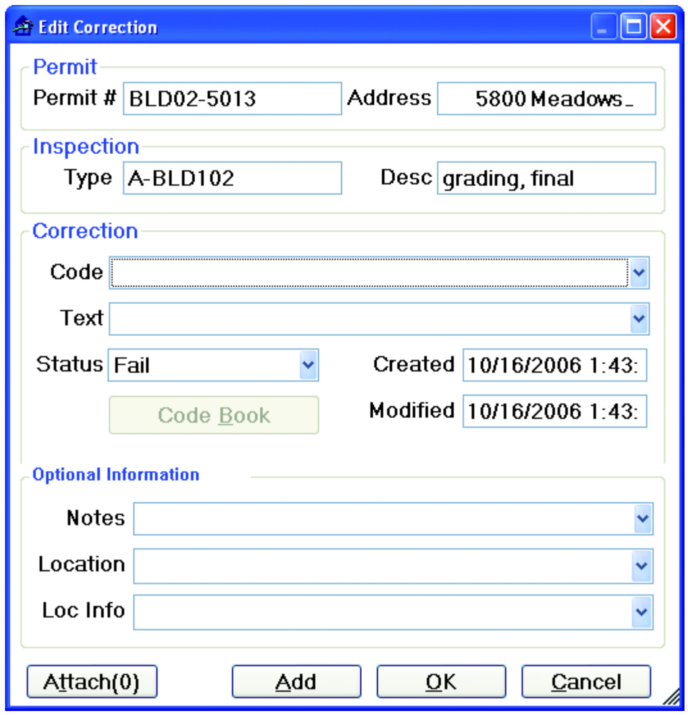


Figure 4-4 Edit Correction window

5. In the Correction section, use the drop-down lists to enter the correction code, correction text and correction status.
6. Under Optional Information, enter correction notes, correct location and location information, to clarify the nature of the correction.
7. Click **Code Book**, if the button is available, to add code book details to the correction. See "Adding Code Book Details to a Correction" on page 30.
8. Click **Add** to save the current correction and enter an additional correction for this inspection.
9. Click **OK** to save the currently displayed entry.
   Corrections are now visible in the Corrections window of the Inspection Results Wizard. See Figure 4-5 on page 29 for an example.

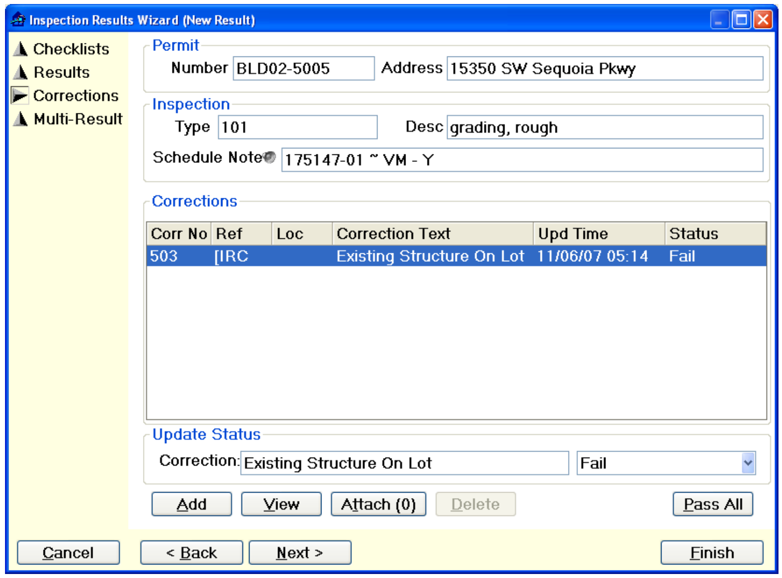


Figure 4-5 Corrections visible in the Inspection Results Wizard

10. Click **Finish** to return to the Route List view.

InspecTrack will not allow you to pass an inspection if there are any failing corrections. You will see a dialog box prompting you to change either the correction or inspection status (Figure 4-6). See "Updating Corrections" on page 30 for more information about passing a correction.

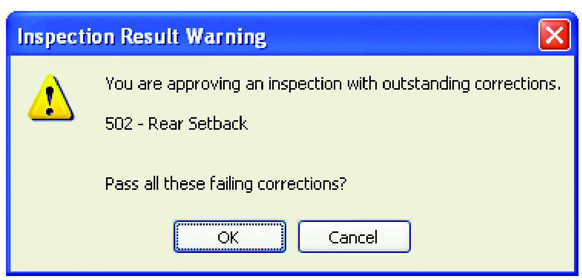


Figure 4-6 Inspection Result Warning prompting you to update the correction status

Updating Corrections

1. Select a permit from the Route List view, then click on the **View Result** task item.
   The Inspection Results Wizard opens.
2. Click **Next** to view the Corrections window.
3. Select a correction from the Corrections window. In the Update Status area, use the drop-down list to update the correction status.
4. Click **Finish** to return to the Route List view.

Adding Code Book Details to a Correction

When adding a correction to a failed inspection, you may have the option of adding code book details that reference specific building codes. You will only be able to add details when code book information is available in the InspecTrack system. Your supervisor is responsible for entering code book details.

1. Once you've selected a correction code from the Edit Correction window, click **Code Book**.
   The Code Book Details window displays (Figure 4-7).

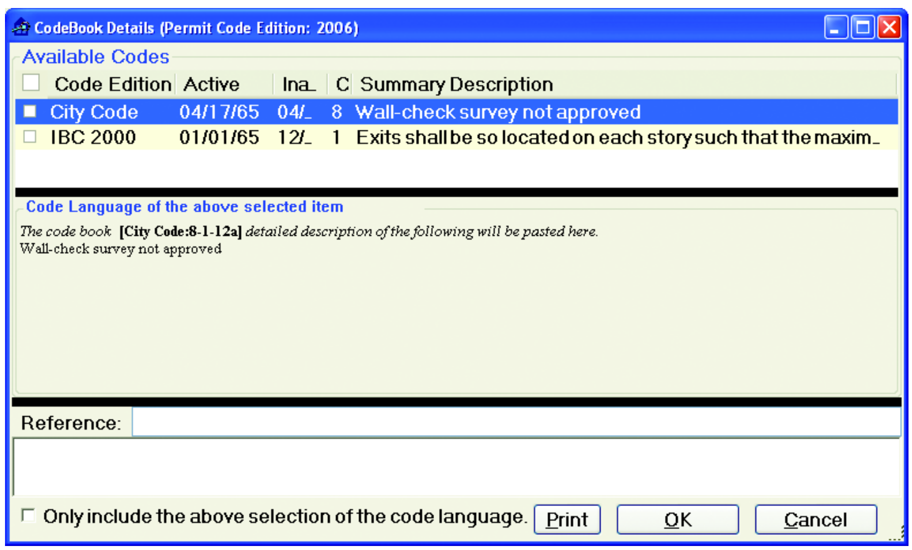


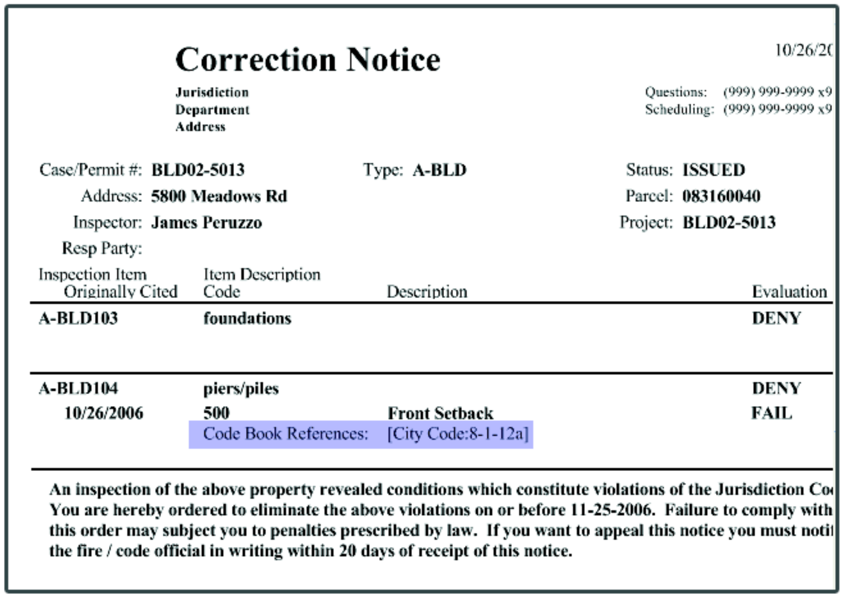
Figure 4-7 Code Book Details window

2. Select the code book and the code details you wish to use from the Available Codes section. You can use details from more than one code book, if necessary.
   The code number appears in the Reference text field (Figure 4-8).

Figure 4-8 Reference text field with code book reference number

3. Click **OK**.
   The name of the code book and the code number displays on the Edit Correction window, under the **Code Book** button.

4. Finish the inspection process and close the Inspection Results Wizard.
   The Code Details are now associated with the inspection, and a reference to the code book and number will appear on the correction notice (Figure 4-9). For more information on printing notices, see "Adding and Printing Field Notices" on page 36.



Correction Notice

10/26/2(

Jurisdiction
Department
Address

Questions: (999) 999-9999 x9
Scheduling: (999) 999-9999 x9

Case/Permit #: **BLD02-5013** Type: **A-BLD** Status: **ISSUED**
Address: **5800 Meadows Rd** Parcel: **083160040**
Inspector: **James Peruzzo** Project: **BLD02-5013**
Resp Party:

Inspection Item / Originally Cited	Item Description / Code	Description	Evaluation
A-BLD103	**foundations**		**DENY**
A-BLD104	**piers/piles**		**DENY**
10/26/2006	**500**	**Front Setback**	**FAIL**
	Code Book References:	[City Code:8-1-12a]	

An inspection of the above property revealed conditions which constitute violations of the Jurisdiction Co(You are hereby ordered to eliminate the above violations on or before 11-25-2006. Failure to comply with this order may subject you to penalties prescribed by law. If you want to appeal this notice you must noti(the fire / code official in writing within 20 days of receipt of this notice.

Figure 4-9 Correction Notice with the Code Book Reference highlighted

Printing Code Book Details

If you would like to provide the contractor, or permit holder, with the exact code book language, you can print the details and post it with the correction notice.

1. Once you've selected the appropriate code book language from the Code Book Details window, click Print.
   The Print Preview window displays (Figure 4-10).

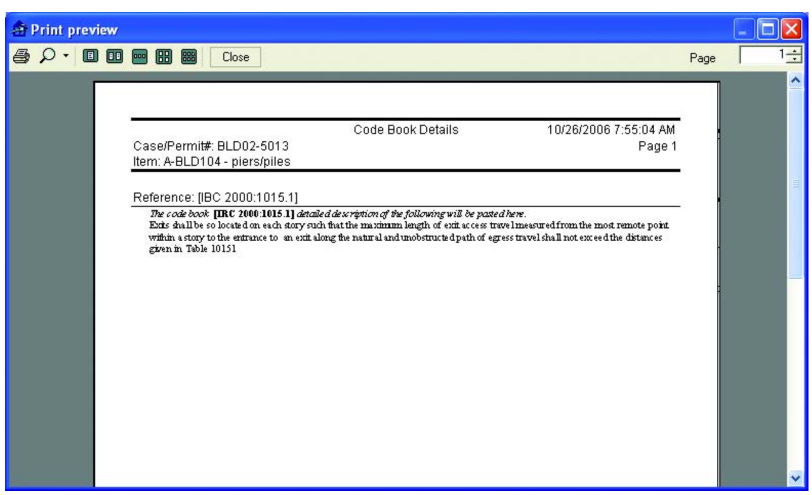


Figure 4-10 Print Preview window displaying a Code Details document

If the print preview is more than one page, you can use the Page numbered list on the Print Preview menu bar to view each page. You can also select various view options so that you can view more than one page in the Print Preview window or zoom in to a particular spot on the document.

2. Click the print icon on the Code Book Details window and finish the inspection process.
3. Click **Close** to return to the Code Book Details window.
4. Click **OK** to return to the Edit Correction window and finish the inspection process.

At some point you may want to only print specific code book details and not the complete section. After selecting the correct code book from the Available Codes section of the Code Book Details window, follow these steps:

1. Highlight the code language text that you want to associate with the inspection in the Code Language section (Figure 4-11).

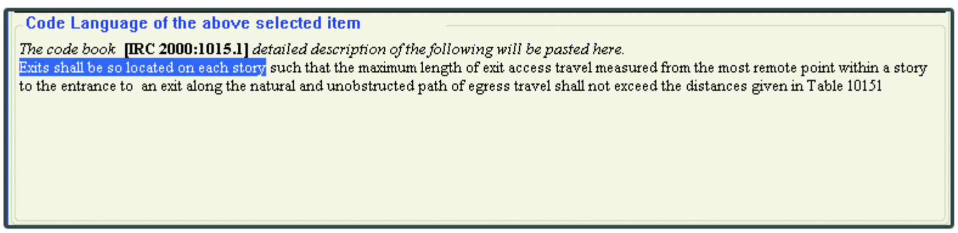


Figure 4-11 Highlighted code language

2. Copy the text and paste it in the text field at the bottom of the Code Details window.

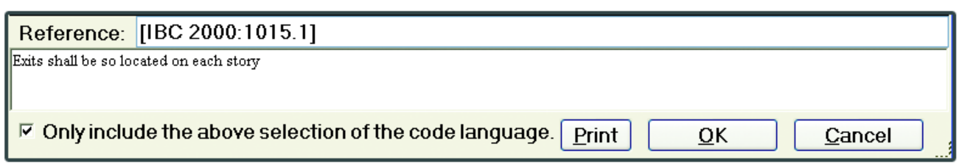


Figure 4-12 Selected code language pasted into the text field

3. Select the **Only include the above selection of the code language** check box.
4. Click **Print**.
   The Print Preview displays the specific code book language you selected. Follow the instructions in "Printing Code Book Details" on page 31 to print the code book details.

Multi Results

If your route has several inspections of the same type, the Multi-Result feature allows you to apply the same results and corrections at the same time. This is especially time-saving when you have numerous passing inspections.

1. Select an inspection from the Route List view, then click **View Result**.
   The Inspection Results Wizard opens.
2. In the Inspection Results Wizard, click **Multi-Result**. The Multi-Result box displays in the wizard (Figure 4-13). All other inspections on your route with the same inspection type as the one you've selected appear in the Multi-Result box.

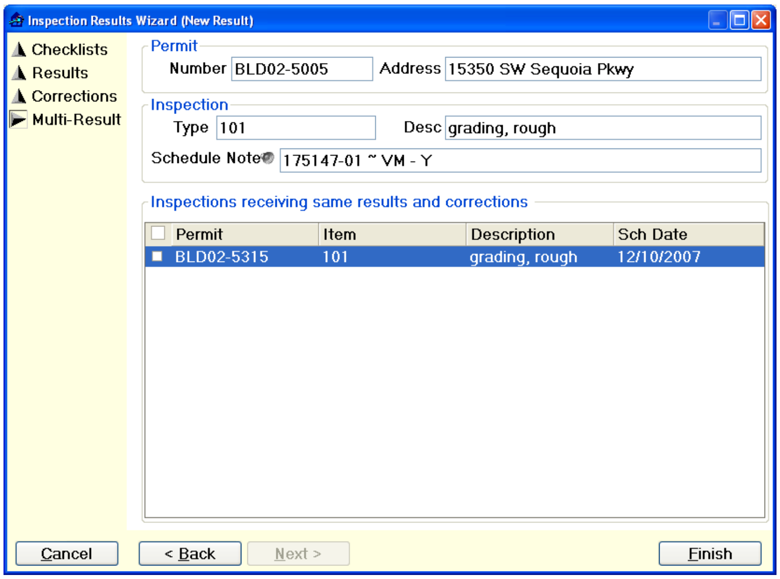


Figure 4-13 Multi-Results Window

3. Check the inspections that should have the same results and corrections as the primary inspection. Marking the checkbox at the top of the column checks all the listed inspections.
4. Proceed to result the inspection. When you **Finish** the inspection, the other inspections you marked in the Multi-Result window will have the same results and corrections applied to them.

Listening to Inspection Messages

If your jurisdiction is using Selectron Technologies' VoicePermits Interactive Voice Response (IVR) system, Notebook Edition automatically downloads all voice messages associated with specific inspections. When contractors or permit holders use the VoicePermits system to schedule inspections, they have the option of leaving a message. You may find it useful to listen to these messages before performing an inspection. These messages can be accessed from the Route List view of Notebook Edition. All inspections with an attached notice will have a speaker icon next to the inspection type. This functionality is not available if VoicePermits is not being used by your jurisdiction

Figure 4-14 Speaker icon located next to inspection type

To hear the inspection messages, your field computer must be equipped with speakers. Contact your System Administrator if you are unable to hear these messages.

Playing Inspection Messages

1. Click the speaker icon next to the inspection type you are interested in.
   The Message playback box opens (Figure 4-15) and the message starts playing.

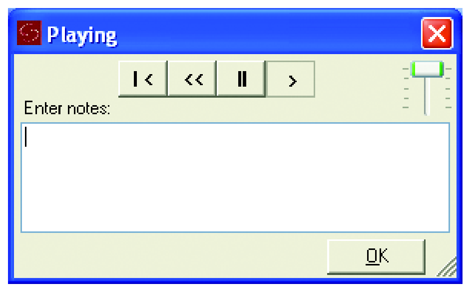


Figure 4-15 Message playback box

2. Use the playback tool bar to adjust playback options. See Table 4-1for an explanation of the tool bar buttons.

Table 4-1 Playback tool bar buttons

Button	Explanation
	Rewind to beginning of message
	Rewind 3 seconds
	Pause
	Play
	Volume control

3. If necessary, you can enter notes in the Enter notes field of the Message playback box.
4. When finished, click OK to save the notes. Otherwise, click the close button ( ) to close the window and not save the notes.
   The Message playback box closes and the speaker icon now has a red check mark through it, indicating that the message has been listened to (Figure 4-16).

Figure 4-16 Speaker icon indicating that the message has been played

If you added any notes to the Message playback Notes field, they now appear in the Schedule Note field in the Inspection Information section of the Route List view (Figure 4-17).

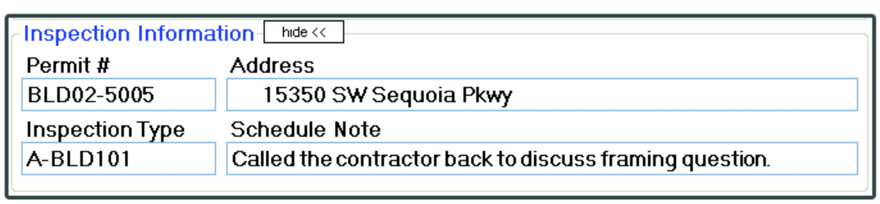


Figure 4-17 Inspection Information section with Message Playback notes in the Schedule Note field

Adding and Printing Field Notices

After completing an inspection, you may wish to print a Field Notice that summarizes the inspection. Through the Notices view, you can attach field notices that can be printed in the field and/or in the office. Correction Notices only include information about failing corrections while Inspection Notices provide information about all corrections associated with a particular permit. Notices can be deleted until Notebook Edition is synchronized with the InspecTrack server. After data has been synchronized, notices cannot be deleted.

Notices are like snapshots in time: an existing snapshot (or notice) cannot be changed, but another one can always be taken (or added). In other words, changes made to the permit or inspection will not be reflected automatically in a notice that is already attached to an inspection. In order to see additional corrections, or existing corrections that have been edited, a new notice must be added in the Notice view.

Attaching and Printing a Field Notice

1. Select a permit from the Route List view, click on the Notices task item to switch to the Notices view (Figure 4-18).

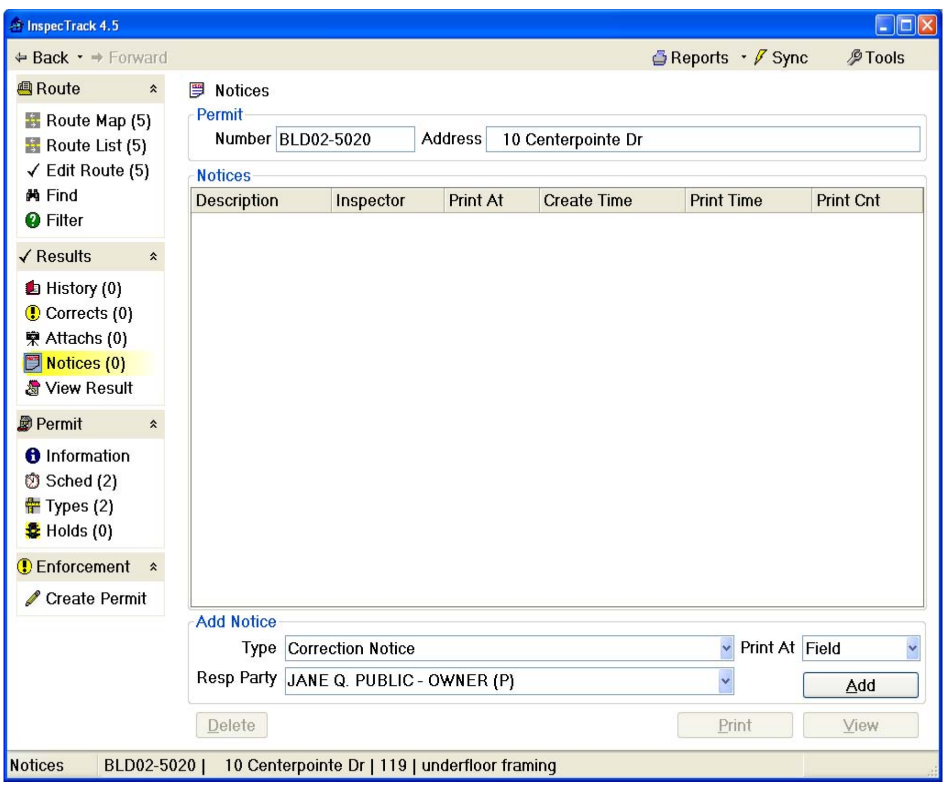


Figure 4-18 Notices view

2. In the Add Notice area, use the **Type** drop-down list to select the type of notice you wish to add. An example of this is shown in Figure 4-19.

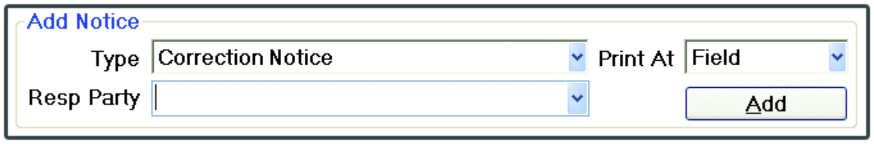


Figure 4-19 Add Notice area

3. Select the permit holder or contractor from the **Resp Party** drop down. If there are no options available, you can type the name in manually.
4. Select the printing location from the **Print At** drop-down list.

If you print the notice in the field, you should select Field from the Print At drop-down. This lets your supervisor know that the notice was printed and given to the permit holder/contractor. If you don't print it in the office, make sure to select Office from the Print At drop-down. The third option in the drop-down, Field and Office, should be selected if your supervisor requires it.

5. Click **Add**.
   The notice appears in the display window.
6. Select the notice that you want to print, and click **Print**.
   The notice prints to the printer identified in the Tools window.
7. Select the **Route List** task item to return to the Route List view.
   The Route List view is displayed.

Signing the Notice

If your jurisdiction has purchased the Digital Signatures module, and you are using a Pen Tablet computer, you can sign the notice prior to printing. You can also acquire a signature from the contractor or permit holder, depending upon your jurisdiction's business rules.

1. Once you have generated a notice and Notebook Edition has displayed it, click the Sign button (Figure 4-20).

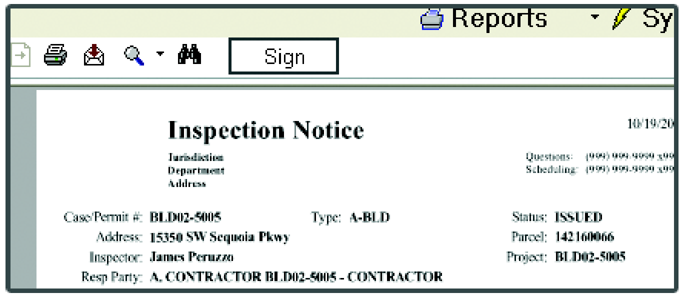


Figure 4-20 Sign button in the Notices view

2. Select the signer's name from the Name drop-down list. If the name is not available, type it into the Name drop-down list.
3. If you are the signer, sign your name. Otherwise, allow the appropriate person (contractor, permit holder, etc.) to do so.
4. To clear the Signature field and try again, click Clear.
5. Click Accept.
   The signature displays on the notice (Figure 4-21).

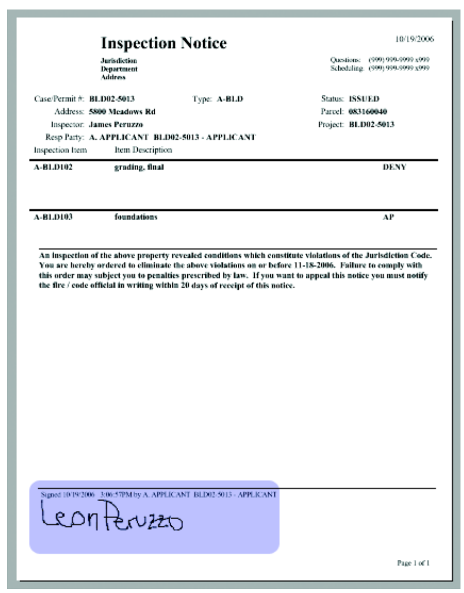


Figure 4-21 Inspection Notice with the permit holder's signature highlighted

Completing Checklists

When posting an inspection result, you may be required to complete a checklist. Checklists are used as a reminder for you to complete certain tasks or follow specific business rules. Your supervisor will decide whether or not a checklist is required to be completed before posting inspection results. If a checklist item is required, the checklist window will display when you attempt to post results (Figure 4-22).

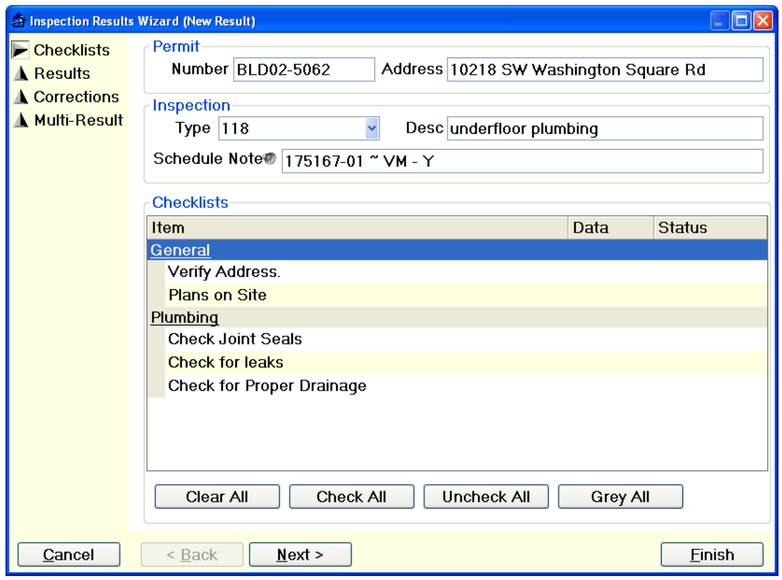


Figure 4-22 Checklist window

To check off an item on the checklist, select its check box. There are three check box states available: checked, unchecked, and grey (not applicable). Simply click the box until the right state displays. Figure Figure 4-23 shows all three states.

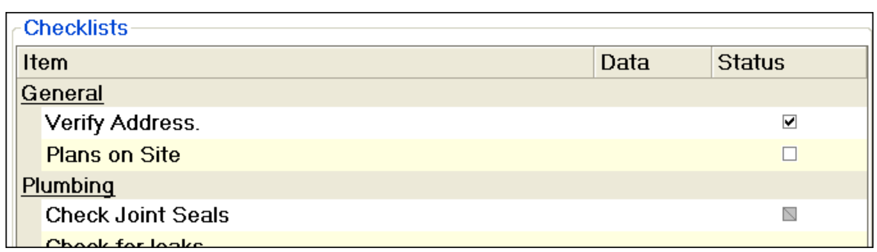


Figure 4-23 Checklist showing all available checklist states

Additionally, you can set all of the checklist items to the same state by clicking the Clear All, Check All, Uncheck All, or the Grey All buttons (Figure 4-24). For example, when selecting the Check All button, all items on the checklist will be checked all at once.

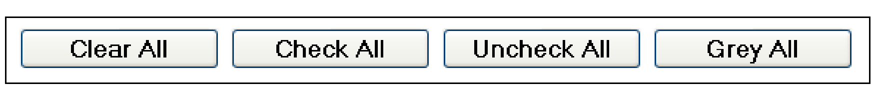


Figure 4-24 The 'same state' checklist buttons

Once you've completed the checklist, you can click Finish to proceed with posting an inspection result. If you have not completed a required checklist or checklist item and you attempt to post an inspection result, Notebook Edition will remind you to finish the checklist.

You must complete a required checklist before finishing the inspection.

Accessing Permit Information 5

CHAPTER

In preparation for, or during, an inspection you may wish to review detailed permit or inspection information, such as the permit address or the number and types of scheduled inspections. For any permit, you can access general information about the permit and any associated inspections.

Review Permit Information

Before adding a permit to your route, you may want to review the general permit information to see if this is the permit you want. Use the Information task item (from the Permit task bar) to review general information, such as the full address, permit status, permit type, project number, or a description of the permit. Additionally, you can check to see who the primary contacts for a particular permit are (owner, or contractor, if available), as well as check parcel information for the permit. You cannot edit the information displayed in the Permit Information view.

1. Select a permit and click the **Information** task item.
   The Permit Information view is displayed, as shown in Figure 5-1 on page 44. By default the General tab is displayed.

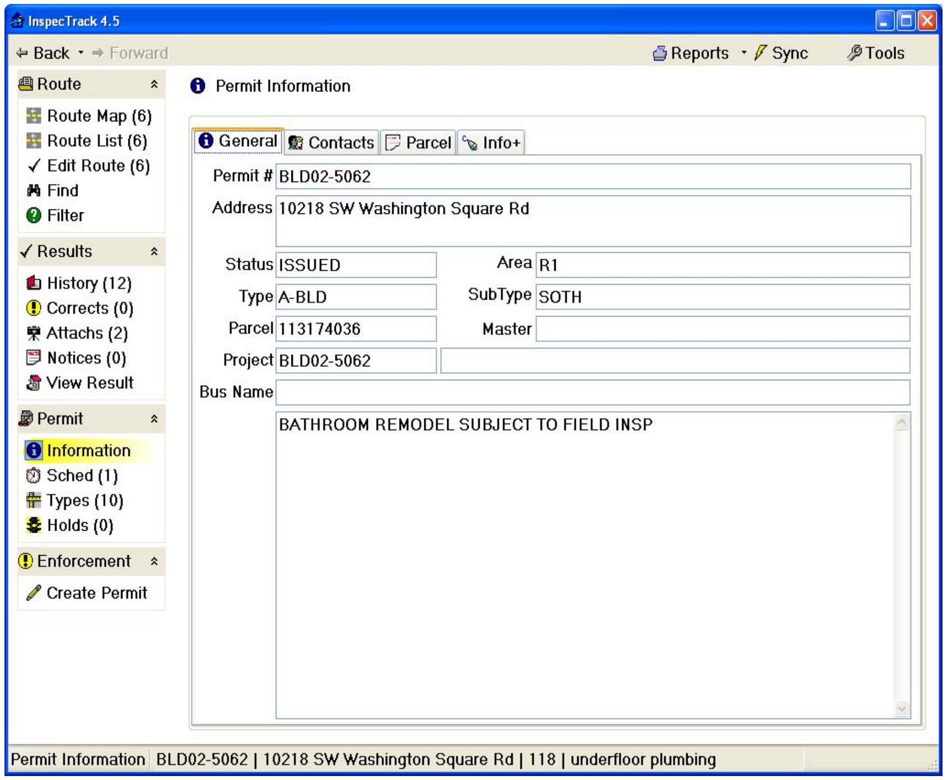


Figure 5-1 Permit Information view, with General tab displayed

2. Select **Contacts**.

   The Contacts tab is displayed (Figure 5-2).

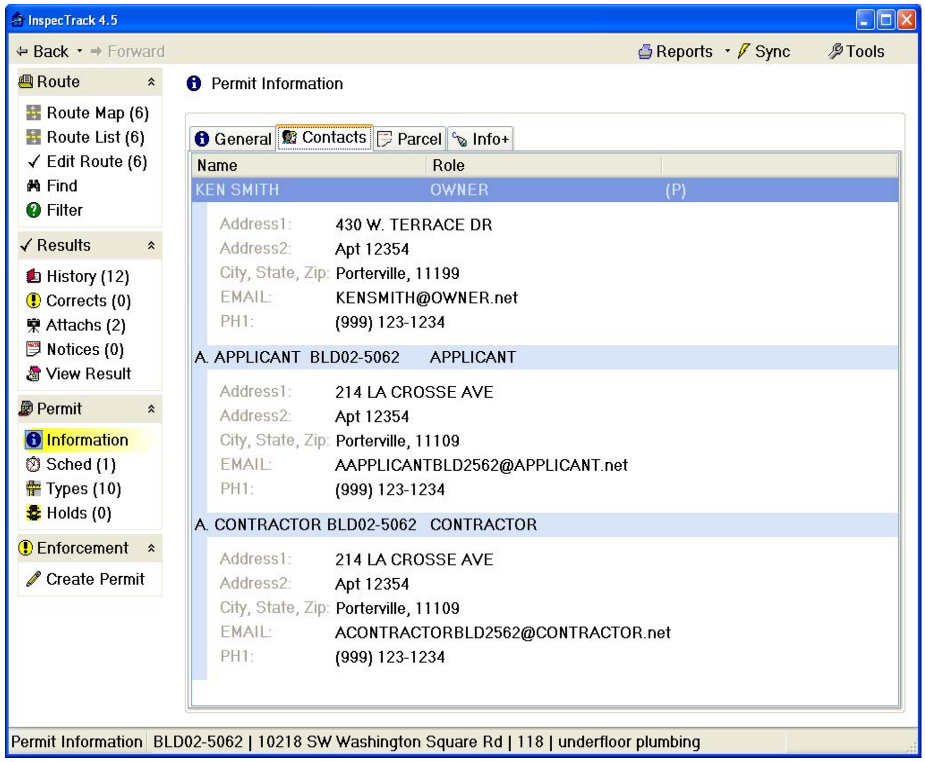


Figure 5-2 Permit Information view, with Contacts tab displayed

3. Select Parcel.
   The Parcel tab is displayed (Figure 5-3).

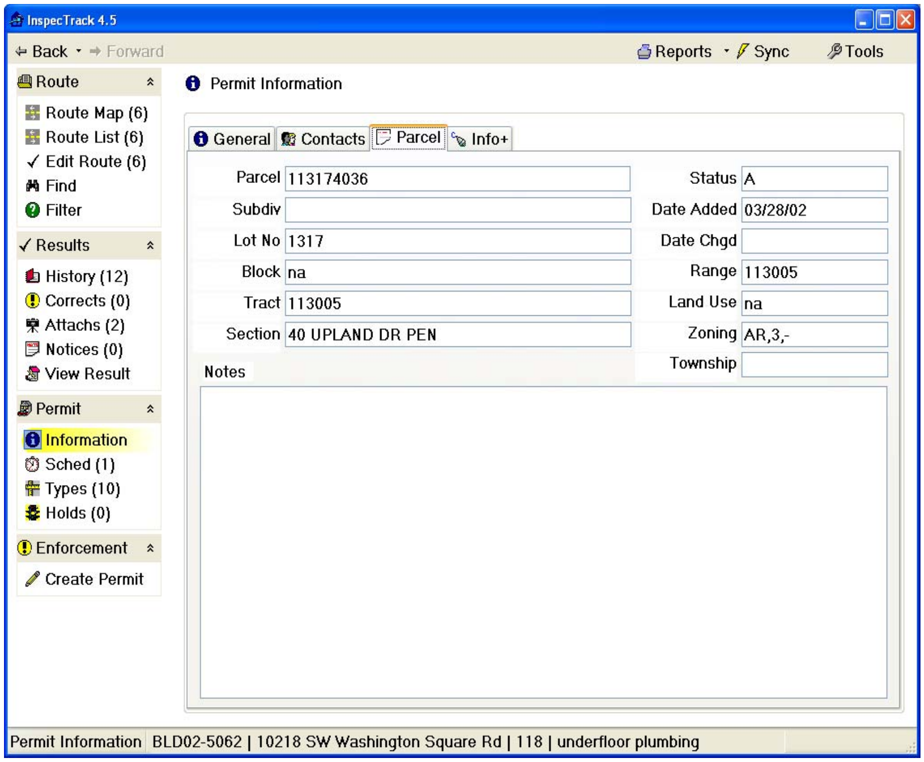


Figure 5-3 Permit Information view, with Parcel tab displayed

4. Select Info+.

   The Info+ tab is displayed[1]. Because your jurisdiction decides what information will appear on the Info+ tab, its exact appearance will vary.

The current permit and inspection are displayed in the status bar at the bottom of the screen. If you only see a permit in the status bar, this indicates that you don't have an inspection selected. Examples of this are shown in Figure 5-4 and Figure 5-5.

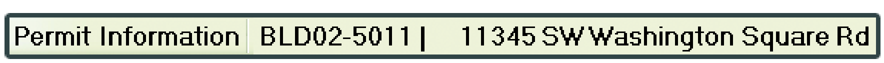


Figure 5-4 Status bar, with permit displayed

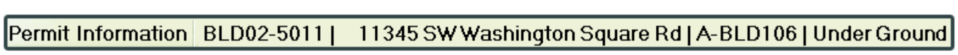


Figure 5-5 Status bar, with permit and inspection displayed

1. Info+ is an optional, add-on component to InspecTrack. If your jurisdition has not purchased this module, the Info+ tab will not be available.

Searching for Inspections or Permits in your Route

If your route is large, it may be difficult to find an inspection or permit. Scrolling through all of the permits in the display window can take a long time, and you may want to find an inspection quickly. In the Edit Route view you can search for an inspection or permit based on the permit number, area, street number, street, scheduled date, type and description.

Searching for Inspections or Permits in the Edit Route View

In the Edit Route view, you can use the show>> and hide<< toggle buttons to access, or hide, the search area. If Notebook Edition finds a permit or inspection within the Edit Route view that matches your search criteria, the matching permit, or inspection, will be selected.

1. Select the Edit Route task item.
   The Edit Route view opens.
2. Click show>>.
   The search area is displayed (see Figure 5-6).

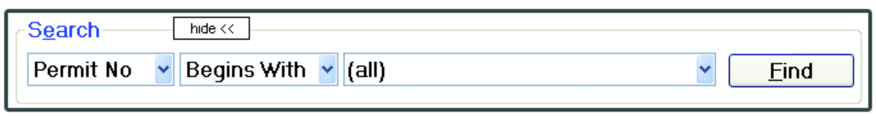


Figure 5-6 Edit Route search area

3. Use the upper left drop-down list to enter the search category.
4. Use the upper middle drop-down list to enter the search criteria. This can be changed to Begins With, Contains or Matches.
5. Enter a search string in the upper right box. You can use the drop-down list to select a pre-defined string, or you can type your own search string into the box. By default, the string is set as All.

A search string is a set of characters (letters or numbers) that you would like Notebook Edition to find. For example, you may want to narrow down your search and only look for permits issued to addresses on Main Street. In the upper left drop-down list, select Street. In the middle drop-down list, select Contains. Then type Main in the search string box. Figure 5-7 on page 48 shows how the top of the filter window would look.

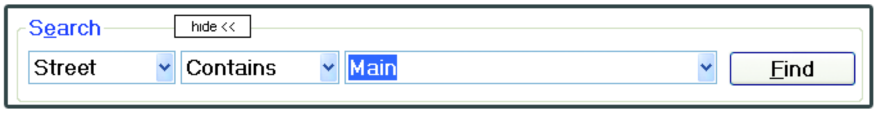


Figure 5-7 Using a search string in the search area

6. Click **Search**.
   The first matching permit or inspection is selected. Clicking **Search** again will take you to the second permit or inspection that matches the search criteria.

Checking Inspection History

Sometimes you need to check if an inspection has taken place or verify the result of a completed inspection. Use the Inspection History view to see a listed of completed inspections, and their status, for a selected permit.

1. Select a permit and click the **History** task item.
   The Inspection History view is displayed, as shown in Figure 5-8.

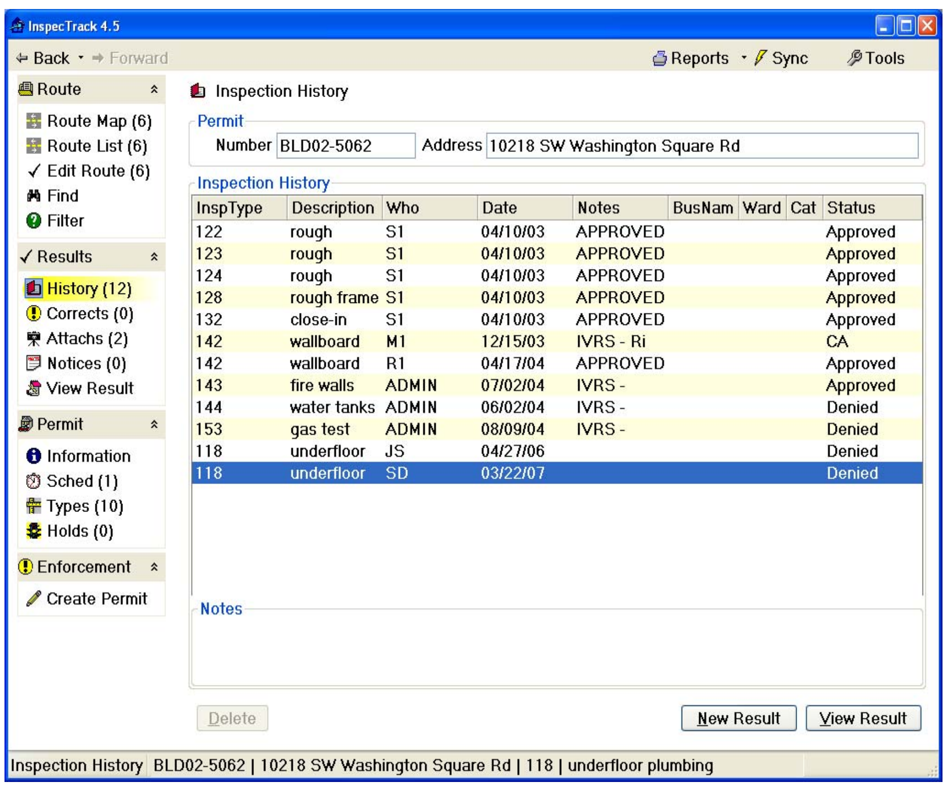


Figure 5-8 Inspection History view

2. Select any task item to leave this view.

Reviewing Corrections

When performing a reinspection, you may want to quickly review the corrections associated with an inspection without opening the Inspection Results Wizard. Use the Corrections view to see a list of all corrections associated with a permit.

Note that the Corrections view is not the same as the corrections window or the Edit Corrections window, both of which are accessed through the Inspection Results Wizard. See "Adding Corrections" on page 27 for detailed instructions on entering and updating corrections.

1. Select a permit from the Route List view and click the **Corrects** task item.
   The Correction view is displayed, as shown in Figure 5-9.

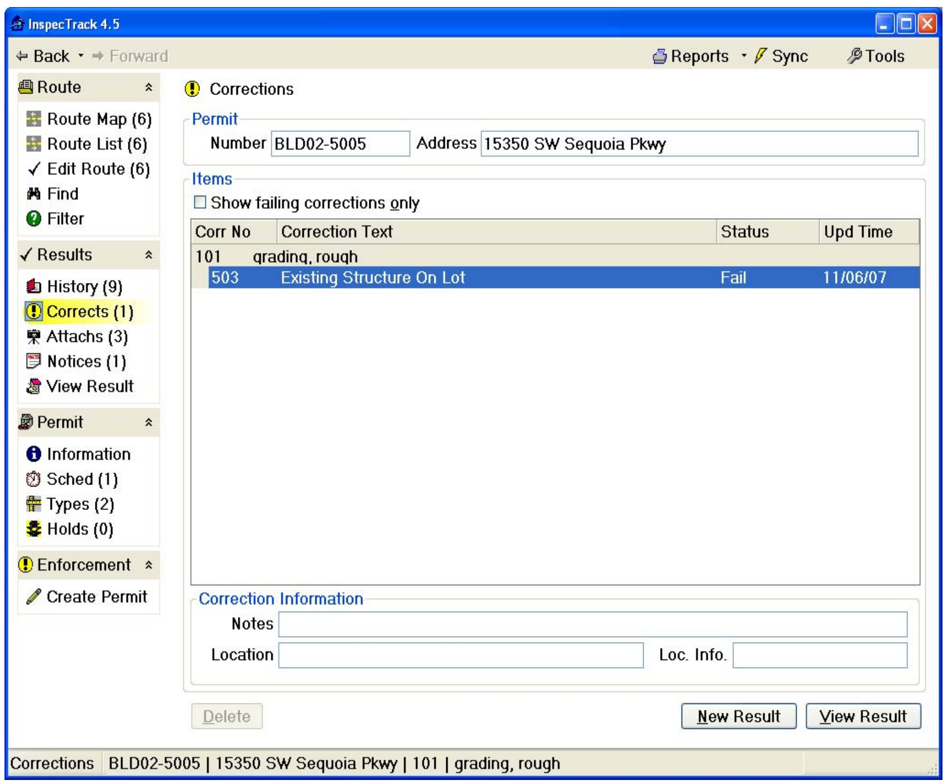


Figure 5-9 Corrections view with corrections displayed

2. Select any task item to leave this view.

View Failing Corrections Only

By default, all corrections (or code violations) associated with an inspection are listed in the Corrections view. Frequently though, you will only want to review failed inspections. You can set the Corrections view to display only failed corrections.

1. Select a permit from the Route List view and click the Corrects task item. The Corrections view is displayed (Figure 5-9 on page 49).
2. Select the Show failing inspections only check box. Failed corrections are visible; corrections that were passed are now hidden.

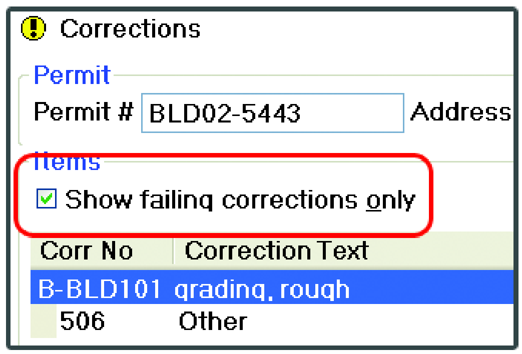


Figure 5-10 Corrections view with the Show failing corrections check box highlighted

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Notebook Edition remembers your last “Show failing inspections only” setting preference and will automatically use this next time you open the Correction view.

3. Select any task item to leave this view.

Scheduling New Inspections

While at an inspection site, you may notice that the contractor is ready for an inspection that has not been scheduled. To save a trip back to the inspection site, you may decide to perform the inspection while on-site. Inspections can be scheduled and updated through the Schedule Inspections view. After you enter or update inspection results, the inspection will remain listed in this view until the next synchronization between Notebook Edition and the InspecTrack server.

Schedule New Inspection

1. Select a permit in the Route List view and click the Sched task item. The Scheduled Inspections view is displayed (Figure 5-11 on page 51).

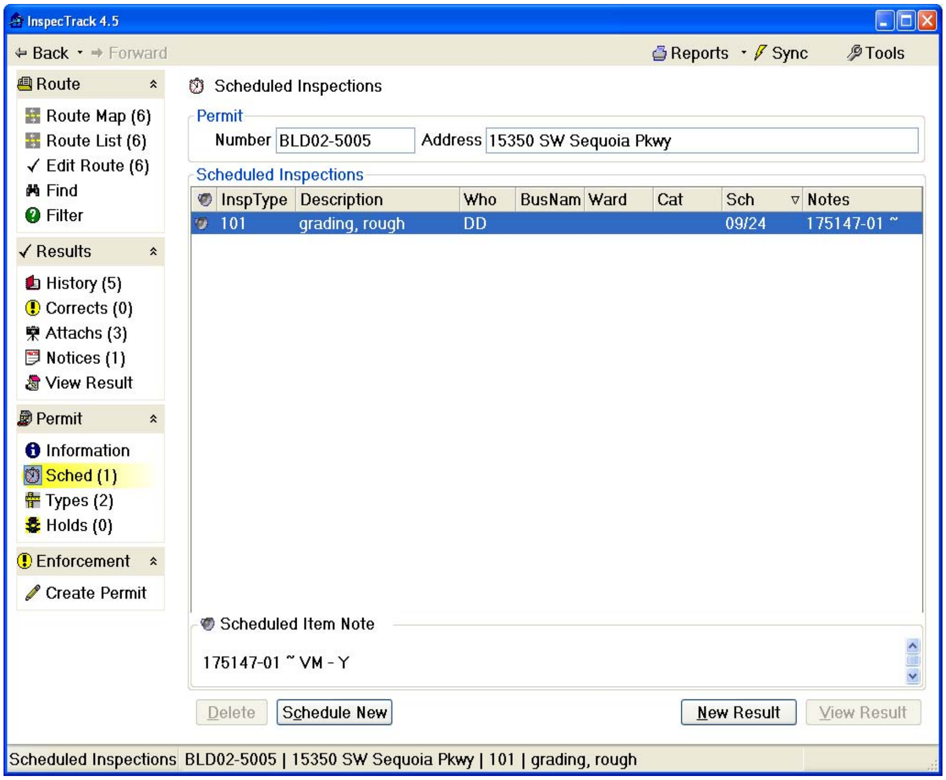

Figure 5-11 Scheduled Inspections view

2. Click Schedule New.
   The Schedule Inspection window opens, as shown in Figure 5-12.

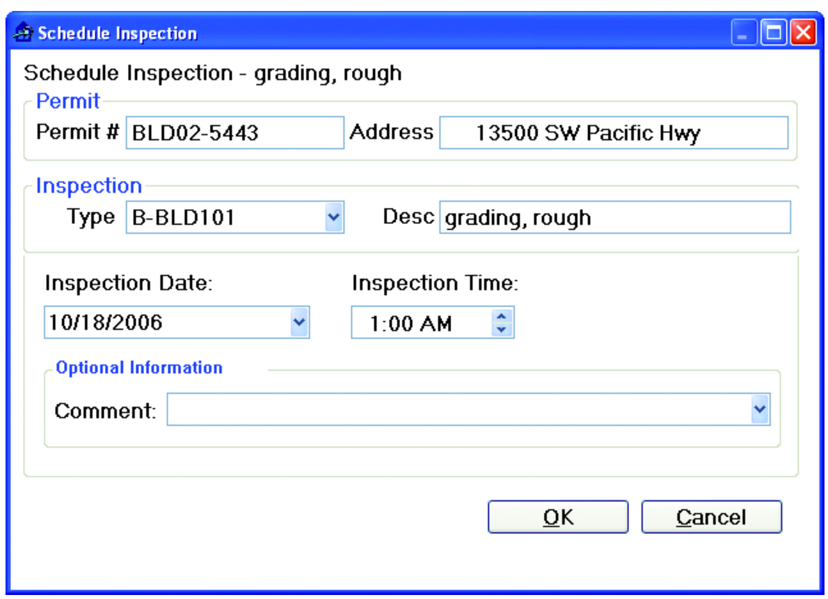

Figure 5-12 Schedule Inspection window

3. Under the Inspection area, use the drop-down list to enter the inspection type.

4. Use the drop-down lists to enter the inspection date and time.
5. Under Optional Information, enter any relevant notes in the Comment field, if necessary.
6. Click OK.
   The Scheduled Inspections view is displayed.

Entering and Updating Inspection Results

Inspection results can be entered or updated through the Schedule Inspection view (as well as other Notebook Edition views) by using the New Result or View Result buttons. Please see "Entering Inspection Results" on page 25 for step-by-step instructions on entering and updating inspection results.

Adding an Inspection Type

Completed, scheduled and unscheduled inspections are displayed in the Inspection Types view. While performing one inspection, you may notice that another type of inspection needs to be added to the permit. An inspection type can be added through the Inspection Types view.

Inspections that are deleted from other Notebook Edition views, such as the Scheduled Inspections view, will remain visible in the Types view. You can only delete inspections that you create in the field. In addition, inspections cannot be deleted after you perform a synchronization.

Caution! If an inspection type is deleted from the type view, all inspections of that type that are associated with the selected permit will be deleted. You can only delete inspections that you create in the field. In addition, inspections cannot be deleted after you perform a synchronization.

1. Select a permit and click the Types task item.
   The Inspection Types view is displayed (see Figure 5-13).

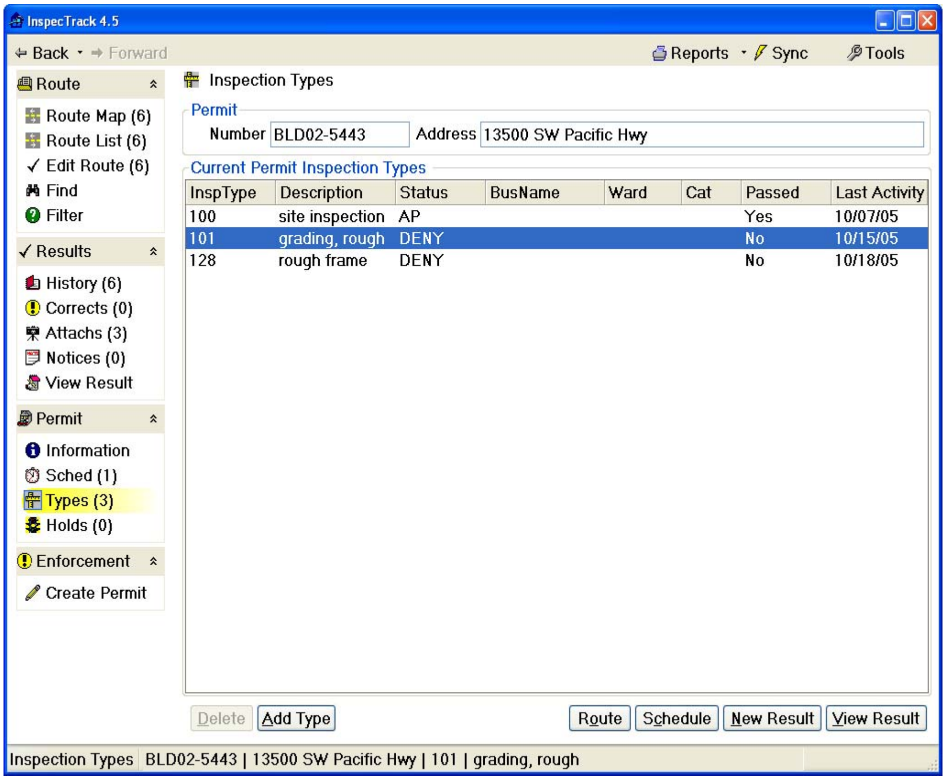

Figure 5-13 Inspection Types view

2. Click Add Type.
   The Add New Type window opens, as shown in Figure 5-14.

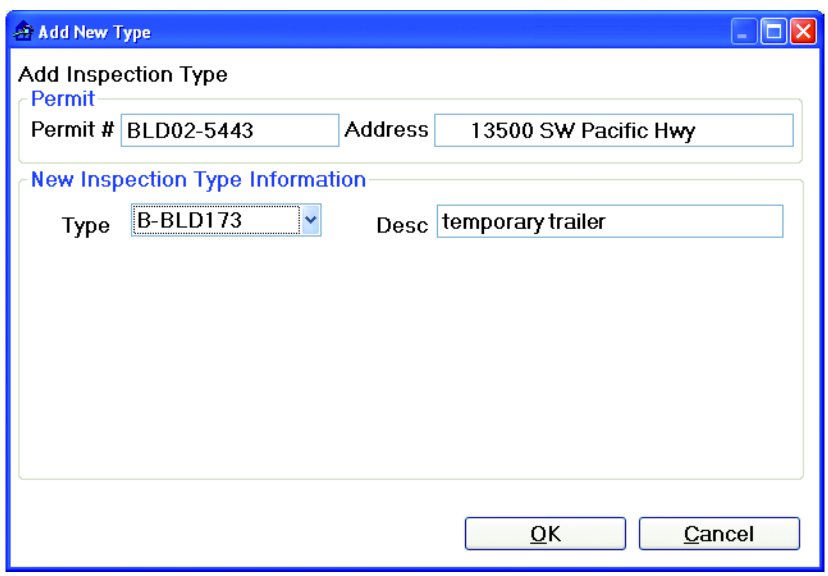

Figure 5-14 Add New Type window

3. Use the Type drop-down list to select the type of inspection you want to add.

4. Click **OK**.
The Inspection Types view is displayed.

Some permitting databases will not accept new inspection types that are added in the field unless the new inspection type has a result associated with it.

Updating Notebook Edition

6

CHAPTER

In order to keep the InspecTrack system up to date, regular synchronizations, or 'syncs,' need to be performed—usually on a daily basis. During a sync inspection results are uploaded from your field computer to the InspecTrack server, while new permits and inspections are downloaded to a database within Notebook Edition. The sync process keeps the information on both your field computer and the InspecTrack server accurate.

Synchronizing Notebook Edition

There are two types of synchronizations, daily and weekly. Daily syncs transfer updates between Notebook Edition and the InspecTrack server and usually run fairly quickly. Only changes on the field computer are uploaded to the server, and only changes from the server are downloaded to Notebook Edition.

By contrast, during a weekly sync, the InspecTrack server downloads a new version of the database to the field computer. All old inspection information that was entered into Notebook Edition will be replaced.

Performing Daily Synchronizations

At least once a day you should sync Notebook Edition with the InspecTrack server. Make sure that you establish a TCP/IP[1] connection to your server before starting the sync process.

1. Select Sync from the Navigation Menu bar.
   The Sync window opens, as shown in Figure 6-1 on page 58.

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1. Transmission Control Protocol/Internet Protocol. This allows your computer to establish a connection with the InspecTrack server and pass data back and forth. For more information on setting up a TCP/IP connection, speak with your system administrator.

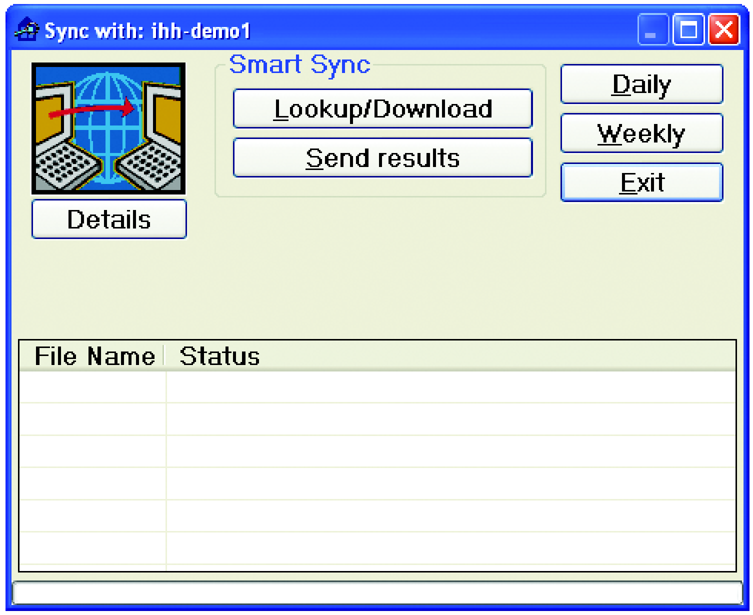


Figure 6-1 Notebook Edition Sync window

2. Click Daily to start the synchronization.
   The Sync window states the number of records that are being transferred.
3. Click Exit to close the Sync window.

! If you do not have a TCP/IP connection established when you click Daily, the connection error dialog box is displayed (Figure 6-2).

Figure 6-2 Connection Error dialog box

Performing Weekly Synchronizations

Weekly syncs refresh the data stored within Notebook Edition; you can perform a weekly sync whenever you feel that the information in Notebook Edition is out of date. You should establish a routine for performing a weekly sync. Ideally, you should run this on a weekly or bi-weekly basis, but this can be done at a time convenient to your schedule. In other words, this does not need to be run every Monday morning. Make sure that your field computer is connected to a TCP/IP connection before starting the synchronization process. You will probably want to use a high-speed connection (e.g. LAN[1]) during a weekly sync as there is a large amount of data being processed.

When you perform a weekly sync, any current inspection data that you have entered will be uploaded to the InspecTrack server. After that data is uploaded, an updated version of the InspecTrack database will be downloaded and will replace the existing data stored in Notebook Edition.

1. Click Sync.
   The Sync window opens.
2. Click Weekly.
   The sync confirmation dialog box appears.

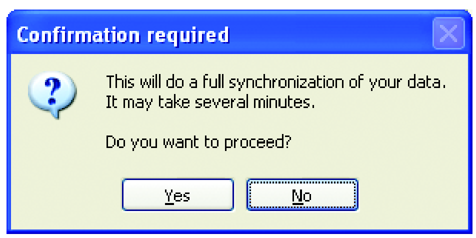


Figure 6-3 Sync confirmation dialog box

3. Click Yes.
   The weekly sync will start. Notice that all buttons are unavailable while the sync is processing. The progress bar and status field allow you to track the progress. An example of a weekly sync in progress is shown in Figure 6-4 on page 60.

1. Local Area Network. A small computer network, typically constrained to a single building or area. In the instance above, you would want to do a weekly while your computer was connected directly to your jurisdiction's network, rather than doing it remotely. For more information on connecting to a LAN, speak to your system administrator.

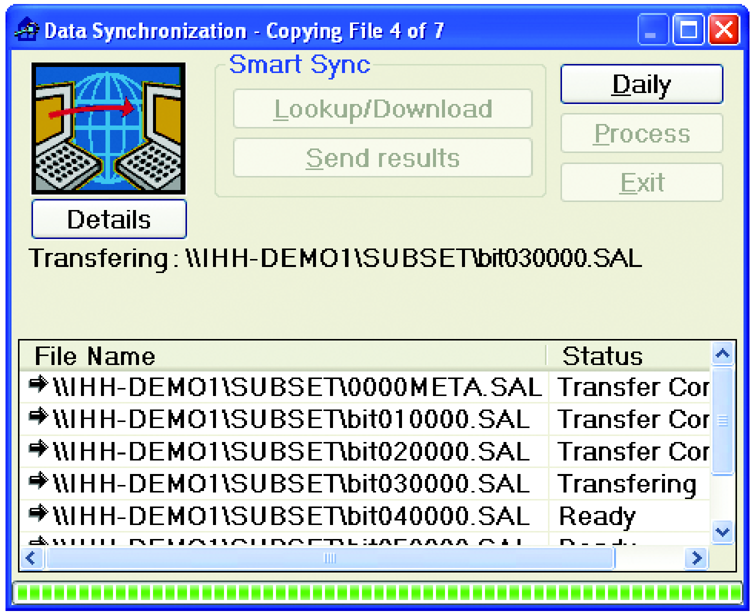


Figure 6-4 Weekly Sync in progress

4. When the sync is finished, the status of all files will be marked as Done.
5. Click Exit to close the Sync window.

Warning! Once the sync has started, do not close the Sync window until synchronization is complete.

Verifying Sync Settings

The Notebook Edition synchronization settings should be configured by your InspecTrack Administrator before your field computer is delivered to you. Occasionally, you may need to verify these settings, or test your connection to the remote server.

Verify Remote Server

At some point you may need to check and make sure that Notebook Edition has the correct server name listed. If the wrong server name is listed, a sync cannot occur.

1. Select Tools from the Navigation Menu bar.
   The Tools window opens with the Settings tab displayed.
2. Click Sync.
   The Sync tab is displayed.

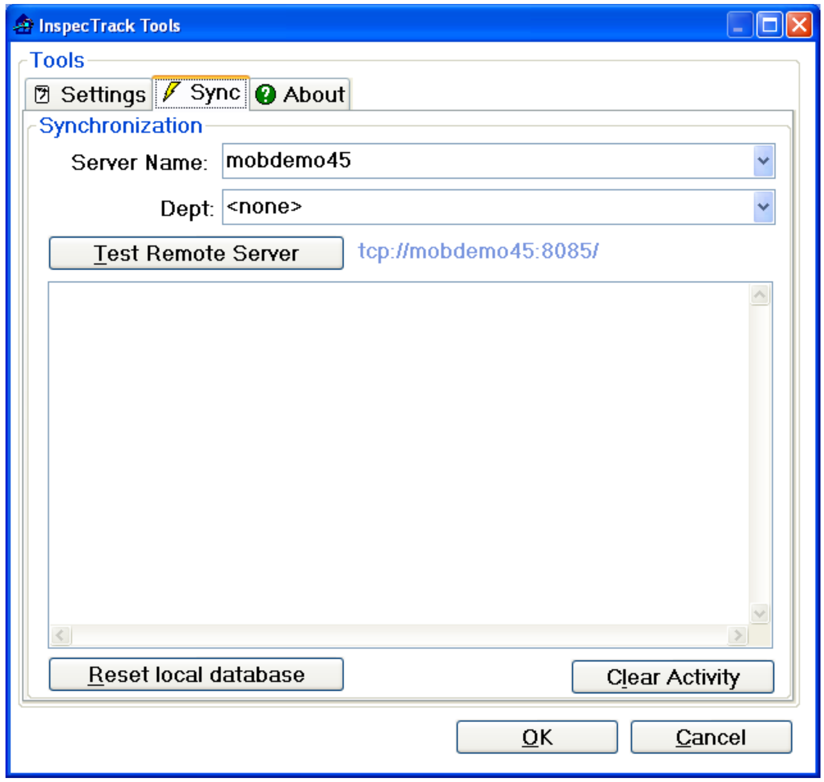


Figure 6-5 Tools window with Sync Tab displayed.

3. The InspecTrack server name will be displayed in the Remote Server field.

Test Connection to Remote Server

Once you've verified that Notebook Edition lists the correct server, you may want to test the connection. Make sure that your field computer is connected to a TCP/IP connection before testing your connection.

1. Select Tools from the Navigation Menu.
   The Tools window opens with the Settings tab displayed.
2. Select the Sync tab.
   The Sync tab is displayed.
3. Click Test Remote Server to check the connection between your field computer and the InspecTrack server.
   The connection is tested and connection status is displayed.

An example of a successful connection to the remote server is shown in Figure 6-6 on page 62. An active connection to the remote server is indicated by the IsDatabaseAvailable=True message. For more information about error messages that appear when the connection is active, see “Sync Tab” on page 104.

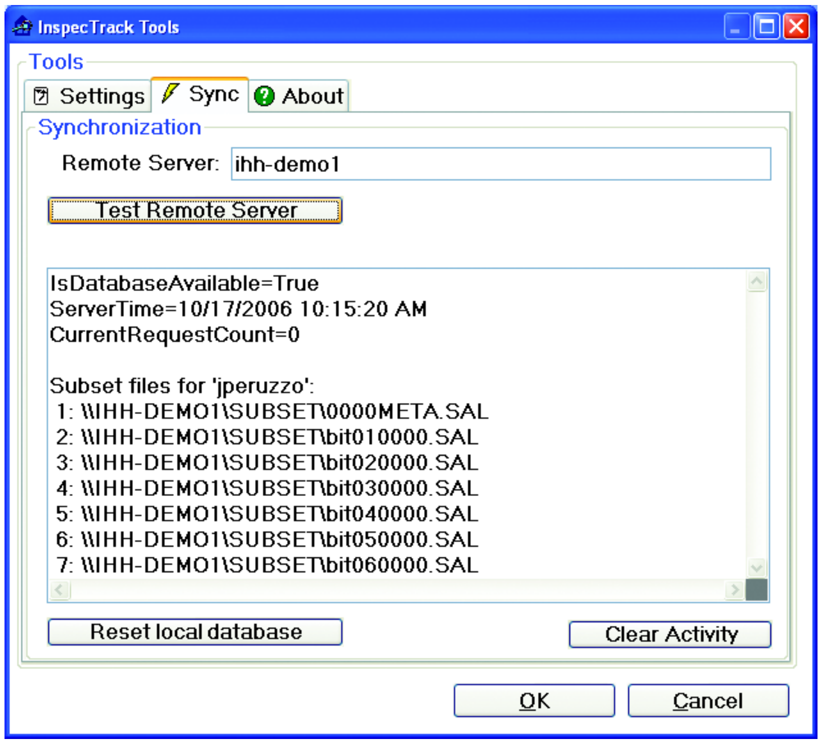


Figure 6-6 Sync tab showing successful connection to remote server

4. Click OK to close the Tools window.

Refreshing Notebook Edition Data

When Notebook Edition downloads information from the InspecTrack server, the data is placed in a database on your field computer. The data from the inspections that you perform are added to this database. When you perform daily syncs, the changes in your local database are uploaded to the server, and changes from the InspecTrack server are downloaded to your local database.

Occasionally your local database may become corrupted, and it may be helpful to reset your local database and replace it with fresh data from the server. You can reset your local database while offline, which is helpful if you determine that your database is corrupt while out in the field.

If Notebook Edition determines that you do not have an active TCP/IP connection you will be unable to sync.

Warning! Resetting your local database will remove the existing data stored in Notebook Edition. Any data that has not been synchronized will be lost.

1. Select **Tools** from the Navigation Menu.
   The Tools window opens with the Settings tab displayed.
2. Click the Sync tab.
   The Sync tab is displayed.
3. Click **Reset local database**.
   The reset confirmation dialog box is displayed.

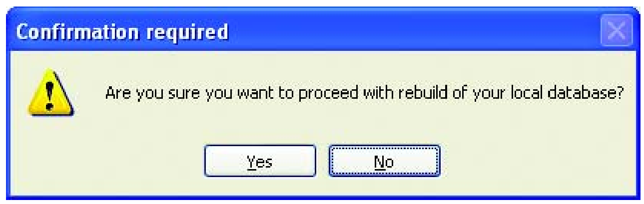


Figure 6-7 Confirmation dialog box

4. Click **Yes**.
   The Sync window opens and Notebook Edition starts to reset your database (Figure 6-8).

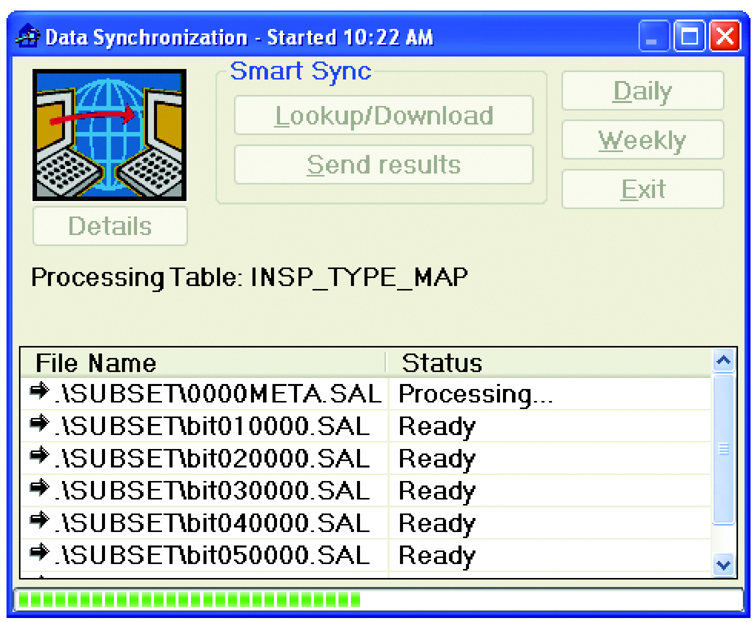


Figure 6-8 The Sync window while rebuilding your local database

5. When the sync is finished, the status of all files will be marked as Done.

6. Click **Exit** to close the Sync window.

Warning! Once Notebook Edition has started rebuilding your database, do not close the Sync window until the rebuild is complete.

Using Smart Sync

The Smart Sync function allows you to either upload or download specific permit records to and from the InspecTrack database. Typically, when you perform synchronizations, only permit information that applies to you will be downloaded. If you needed to perform an inspection that wasn't on your route, and isn't available on Notebook Edition, you could use Smart Sync to search for the permit. On the other hand, you may only want to upload certain permits when performing a sync—with Smart Sync, you can pick and choose which records are sent to the InspecTrack database.

This section explains how to use the Smart Sync function.

Downloading Specific Permit Information

Using Smart Sync, you can remotely search the permitting database for a specific permit. Once you have located the correct permit you can download it (and any others you might need) to Notebook Edition

1. Select **Sync** from the Navigation Menu bar.
   The Sync window displays.
2. Click **Lookup/Download** from the Smart Sync menu.
   The Smart Sync Lookup window displays (Figure 6-9).

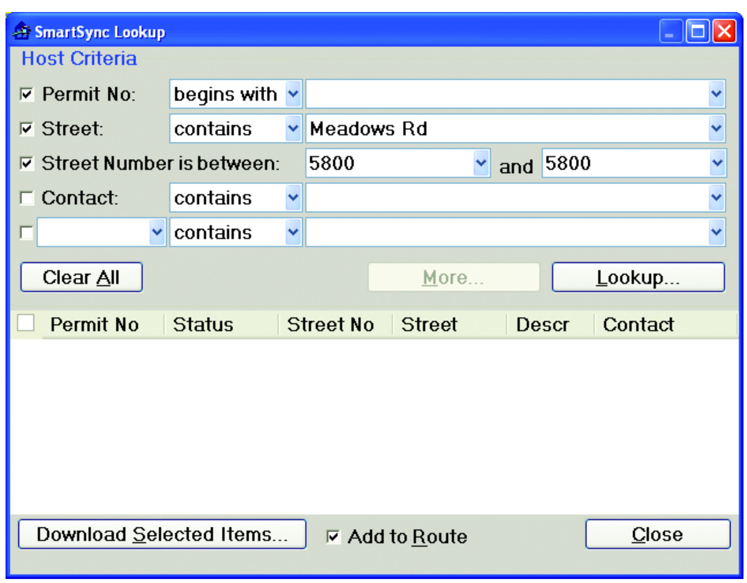


Figure 6-9 Smart Sync lookup window

3. Enter search criteria by selecting any combination of check boxes and entering information using the drop-down fields.

The Smart Sync search feature works much like the Filter view when adding permits to your route. See "Building a Route" on page 15 for more information.

4. Click **Lookup**.
   All permits matching the search criteria will be displayed.

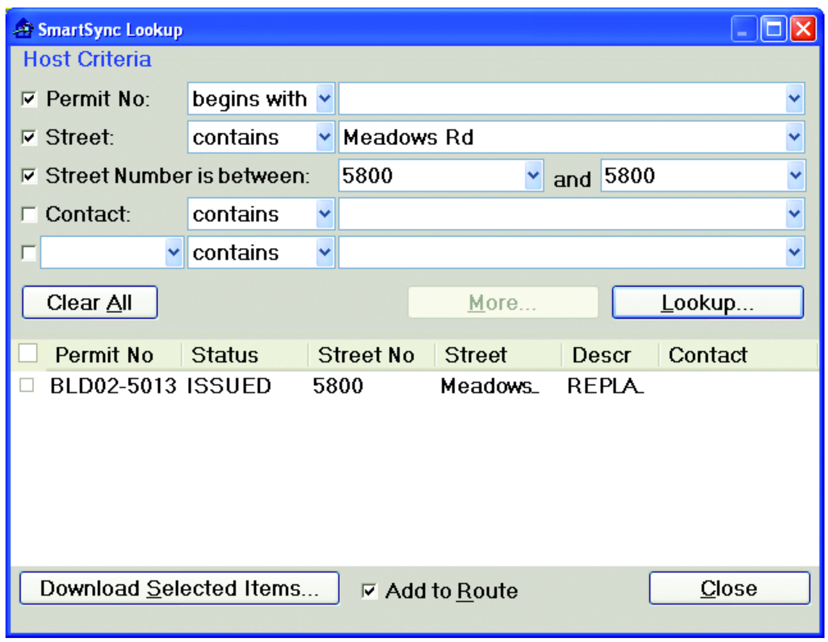


Figure 6-10 Smart Sync Lookup window with search results

Smart Sync only displays the first 10 records that match the search criteria. To view additional records (in groups of 10) click More.

5. Select the check box next to each permit you wish to download to Notebook Edition.
6. Click **Add to Route** if you want the permits added directly to the Route List view.
7. Click **Download Selected Items**.
   If you have selected a large number of permits, the Confirm Large Download dialog box will appear (Figure 6-11).

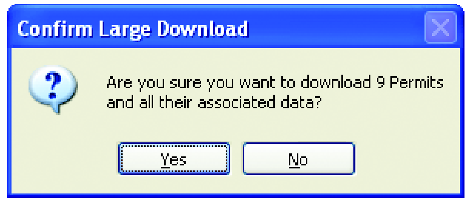


Figure 6-11 Confirm Large Download dialog box

8. Click Yes.
9. Click Close.

Uploading Specific Permit Information

Smart Sync allows you to upload specific permits to the InspecTrack database, while leaving others on Notebook Edition.

1. Select Sync from the Navigation Menu bar.
2. Click Send Results from the Smart Sync menu.
   The upload results dialog box appears with all completed, un-synchronized inspections (Figure 6-12).

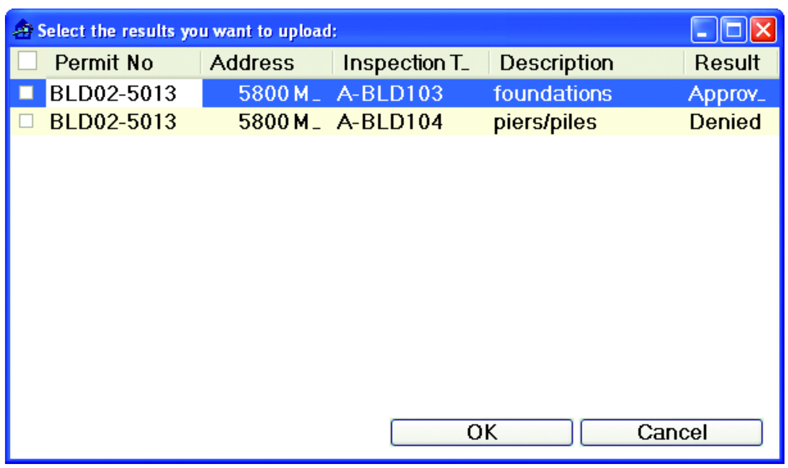


Figure 6-12 Upload Results dialog box

3. Select the check box next to each permit that you wish to upload.
4. Click OK.
   The Sync window displays a message confirming the upload (Figure 6-13).

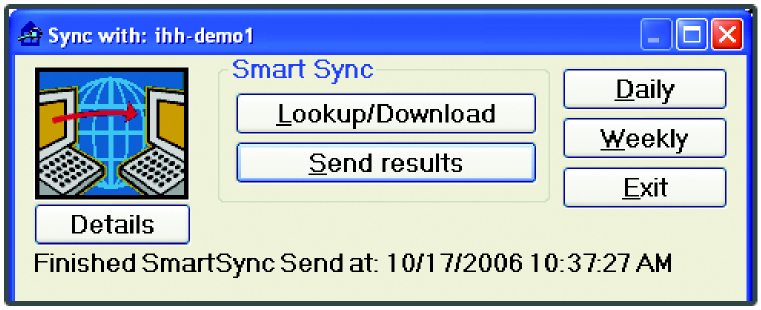


Figure 6-13 Sync window after successful Smart Sync upload

5. Click Exit to close the Sync window.

Upgrading Notebook Edition to a New Version

At some point, your jurisdiction may choose to upgrade the InspecTrack system to the latest version. When this occurs, you will need to upload the new version to your mobile computer. While this will not happen frequently, this section details how to upgrade your version of Notebook Edition when the time comes.

1. Select Tools from the Navigation Menu Bar.
   The Tools window opens with the Settings tab displayed.
2. Select the About tab.
   The About tab displays (Figure 6-14).

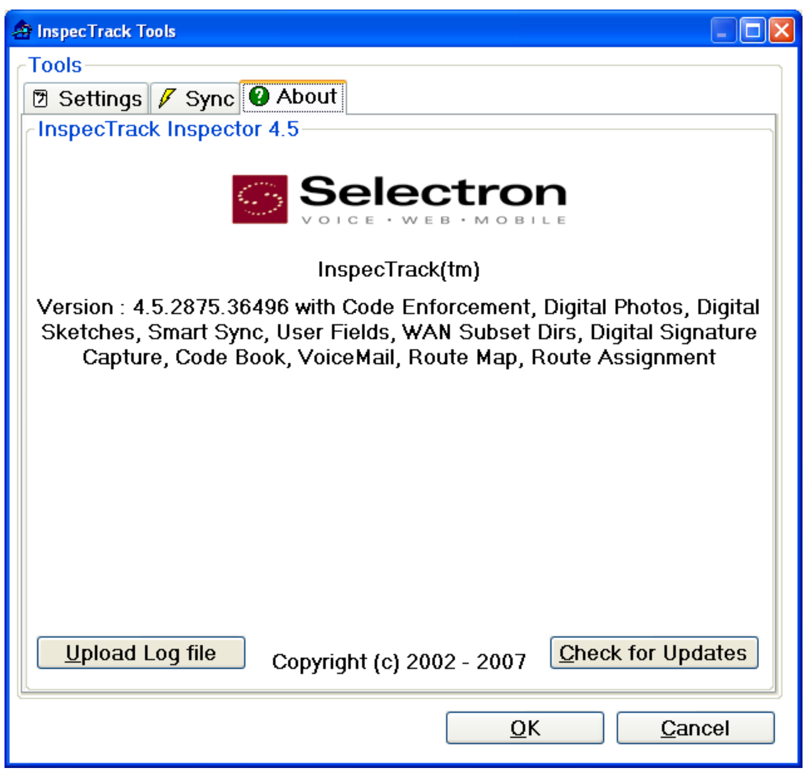


Figure 6-14 About tab

3. Click **Check for Updates**.

   If an update is available, the Check for updates window appears along with the Program Updates dialog box (Figure 6-15).

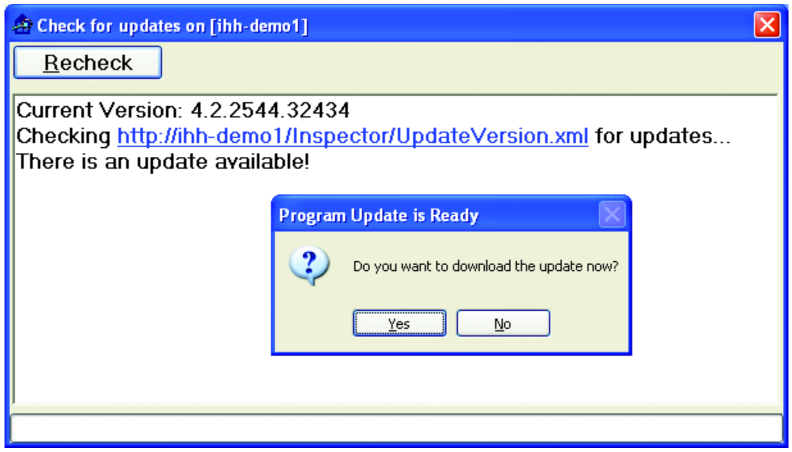


Figure 6-15 Check for Updates window and the Program Updates dialog box

4. Click **Yes**.

   The Check for Updates window displays the update status. Once the download is complete, your local Notebook Edition database will be rebuilt (Figure 6-16). Once that has completed, Notebook Edition will reboot and display the Sync window.

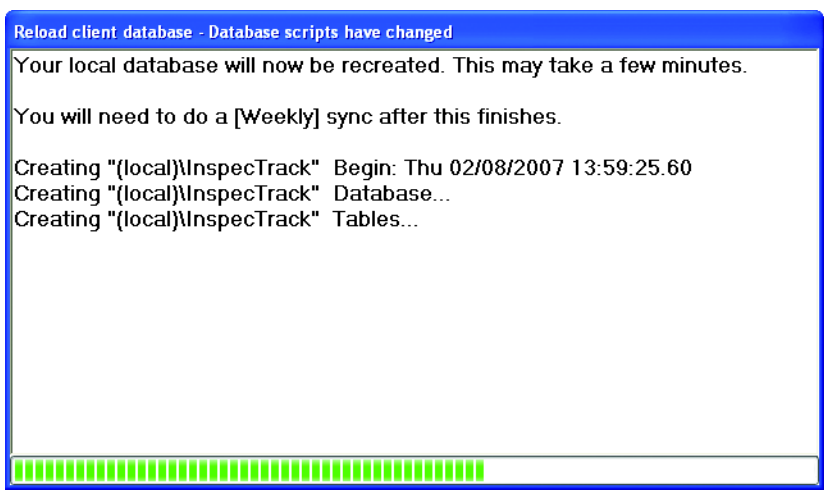


Figure 6-16 Notebook Edition database being rebuilt

5. Click **Weekly**.

   Once the Weekly sync has completed, Notebook Edition is ready for use.

Using Reports

A

APPENDIX

While using Notebook Edition, you may need to print a report (Route Report, Activity Summary, or Inspection Summary) or a notice (Correction or Inspection). All reports and notices use the same tool bar and behave in a similar manner. So once you learn one report, you'll know how to use all reports.

To begin with, all reports and notices use the reports tool bar. Table A-1 briefly describes the icons on the tool bar.

Table A-1 Report Tool Bar Icons

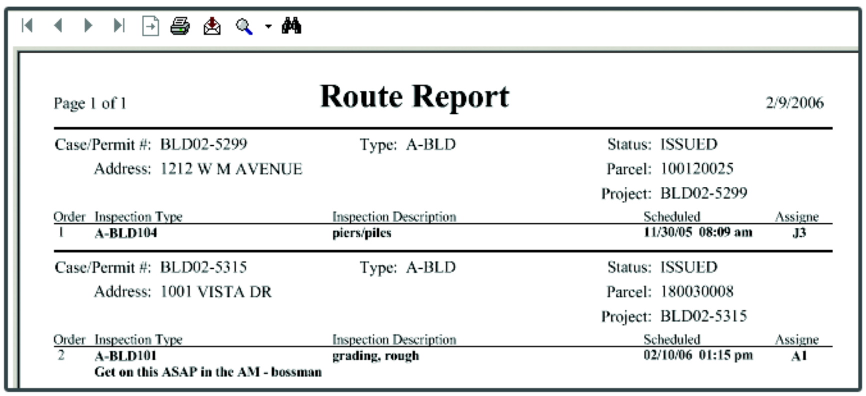
Icon	Description
	Go to first page of report
	Go to previous page of report
	Go to next page of report
	Go to last page of report
	Go to a specific page in the report
	Print report
	Export report to an external file in .PDF, .XLS, .DOC, or .RTF formats
	Zoom in or out
	Search report

Note that the ‘go-to’ icons are only available if you are viewing a multi-page report.

Print a Route Report

At the beginning of the day, before leaving the office, you may want to print a Route report. A paper copy of your Route List view may be useful while you are driving to inspection sites.

1. Select **Reports** from the Navigation Menu Bar.
2. Select **Route Listing** from the drop down list.
   The report appears in the Display Window. An example is shown in Figure A-1.


Page 1 of 1 **Route Report** 2/9/2006

Case/Permit #: BLD02-5299 Type: A-BLD Status: ISSUED
Address: 1212 W M AVENUE Parcel: 100120025
Project: BLD02-5299

Order	Inspection Type	Inspection Description	Scheduled	Assigne
1	A-BLD104	piers/piles	11/30/05 08:09 am	J3

Case/Permit #: BLD02-5315 Type: A-BLD Status: ISSUED
Address: 1001 VISTA DR Parcel: 180030008
Project: BLD02-5315

Order	Inspection Type	Inspection Description	Scheduled	Assigne
2	A-BLD101 Get on this ASAP in the AM - bossman	grading, rough	02/10/06 01:15 pm	A1

Figure A-1 Route Report

3. Click the print icon.
   The print dialog box opens (as shown in Figure A-2 on page 73).

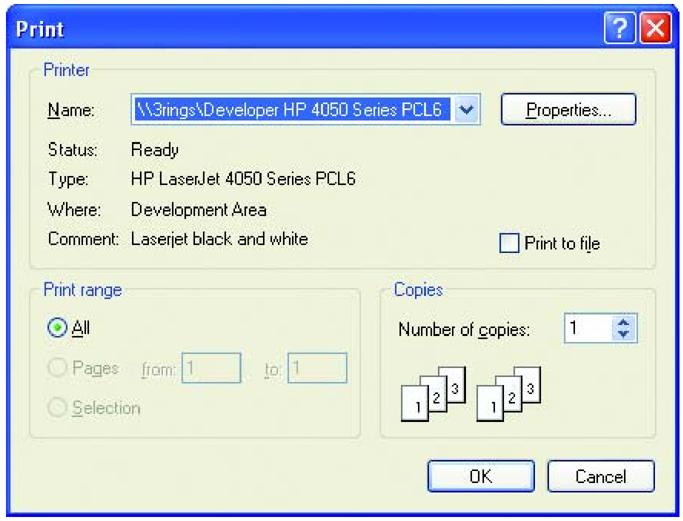


Figure A-2 Print dialog box

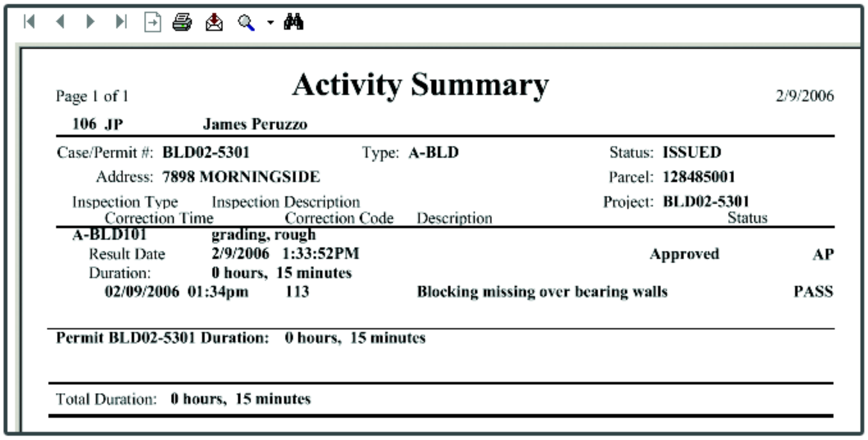
4. Click **OK**.
   The report is sent to the default printer. For information on changing your default printer, see “Changing your Default Printer” on page 75.

Print the Activity Summary

At the end of the day, use the Activity summary to print a list of all inspections that you have performed that day. This report can include information about multiple permits and is divided by permit number. If no inspections have been performed, the summary will be blank. Use this report at the end of the day when you need a detailed list of the day’s activities.

Keep in mind that this summary includes all inspections that have been performed since the last time that Notebook Edition synchronized with the InspecTrack server.

1. Select **Reports** from the Navigation Menu Bar.
2. Select **Activity Listing** from the drop down list.
   The report appears in the Display Window. An example is shown in Figure A-3 on page 74.



Page 1 of 1 **Activity Summary** 2/9/2006

106 JP **James Peruzzo**

Case/Permit #: **BLD02-5301** Type: **A-BLD** Status: **ISSUED**

Address: **7898 MORNINGSIDE** Parcel: **128485001**

Inspection Type	Inspection Description		Project: **BLD02-5301**	
Correction Time	Correction Code	Description		Status
A-BLD101	**grading, rough**			
Result Date	**2/9/2006 1:33:52PM**		**Approved**	**AP**
Duration:	**0 hours, 15 minutes**			
02/09/2006 01:34pm	**113**	**Blocking missing over bearing walls**		**PASS**

Permit BLD02-5301 Duration: 0 hours, 15 minutes

Total Duration: **0 hours, 15 minutes**

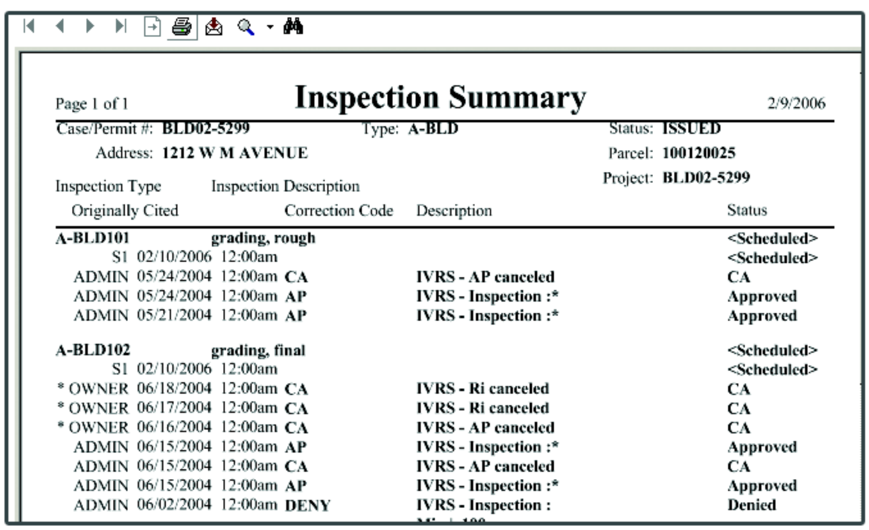
Figure A-3 Activity Summary report

3. Click the print icon.
   The print dialog box opens (as shown in Figure A-2 on page 73).
4. Click OK.
   The report is sent to the default printer. For information on changing your default printer, see "Changing your Default Printer" on page 75.

Print an Inspection Summary

Use the Inspection Summary when you want to print a detailed list of inspections associated with a particular permit. Details of both completed and scheduled inspections are shown.

1. Select Reports from the Navigation Menu Bar.
2. Select Inspection Summary from the drop down list.
   The report appears in the Display Window. An example is shown in Figure A-4.



Page 1 of 1 **Inspection Summary** 2/9/2006

Case/Permit #: **BLD02-5299** Type: **A-BLD** Status: **ISSUED**

Address: **1212 W M AVENUE** Parcel: **100120025**

Project: **BLD02-5299**

Inspection Type	Inspection Description		
Originally Cited	Correction Code	Description	Status
A-BLD101	**grading, rough**		**<Scheduled>**
S1 02/10/2006 12:00am			**<Scheduled>**
ADMIN 05/24/2004 12:00am	**CA**	**IVRS - AP canceled**	**CA**
ADMIN 05/24/2004 12:00am	**AP**	**IVRS - Inspection :***	**Approved**
ADMIN 05/21/2004 12:00am	**AP**	**IVRS - Inspection :***	**Approved**
A-BLD102	**grading, final**		**<Scheduled>**
S1 02/10/2006 12:00am			**<Scheduled>**
* OWNER 06/18/2004 12:00am	**CA**	**IVRS - Ri canceled**	**CA**
* OWNER 06/17/2004 12:00am	**CA**	**IVRS - Ri canceled**	**CA**
* OWNER 06/16/2004 12:00am	**CA**	**IVRS - AP canceled**	**CA**
ADMIN 06/15/2004 12:00am	**AP**	**IVRS - Inspection :***	**Approved**
ADMIN 06/15/2004 12:00am	**CA**	**IVRS - AP canceled**	**CA**
ADMIN 06/15/2004 12:00am	**AP**	**IVRS - Inspection :***	**Approved**
ADMIN 06/02/2004 12:00am	**DENY**	**IVRS - Inspection :**	**Denied**

Figure A-4 Inspection Summary report

3. Click the print icon.
   The print dialog box opens (as shown in Figure A-2).
4. Click **OK**.
   The report is sent to the default printer. For information on changing your default printer, see "Changing your Default Printer" on page 75.

Print Correction and Inspection Notices

Correction and inspection notices use the same navigation bar. For more information on viewing and working with corrections see "Reviewing Corrections" on page 49. Similarly, "Adding and Printing Field Notices" on page 36 provides information on working with notices.

Follow these steps if you want to print or view an inspection or correction notice that has already been associated with an inspection.

Viewing a Notice or Correction

1. Select the **Notices** task item.
   The Notices view opens.
2. Select the notice or correction that you want to view. Click **View**.
   The inspection notice or inspection correction opens.

You can print your notice by clicking the print icon on the tool bar.

Printing a Notice or Correction

1. Select the **Notices** task item.
   The Notices view opens.
2. Select the notice or correction that you want to print and click **Print**.
   The notice or correction prints to the printer selected in the Tools window.

Changing your Default Printer

By default, Notebook Edition prints reports, notices and summaries to your computer's default printer.

1. Select **Tools** from the Navigation Menu.
   The Tools window opens with the Settings tab displayed (Figure A-5 on page 76).

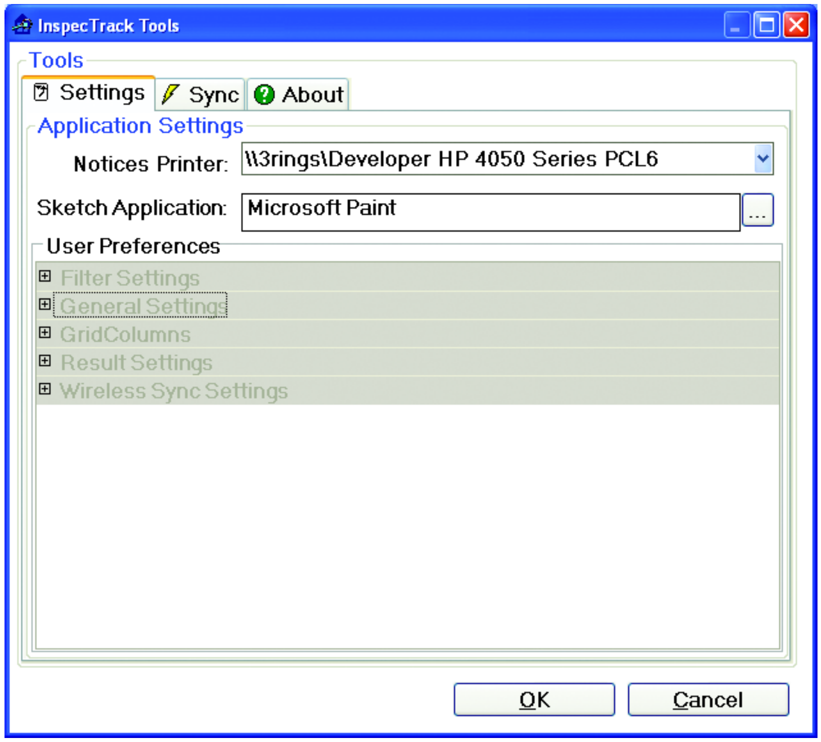


Figure A-5 Tools window with Settings tab displayed

2. In the Notices Printer field, use the drop-down list to select the printer to which you want to print your notices and reports (see Figure A-5).
3. Click Apply to apply the change.
4. Click OK to close the Tools window.

Your computer's default printer is controlled by Microsoft® Windows®. You can add printers to your computer by navigating to the Control Panel and selecting Printers. Contact your System Administrator for additional help with Windows.

Using the Route Map

B

APPENDIX

The Route Map view provides a visual alternative to the Route List view[1]. The Route Map view displays a map showing points that correspond to all inspections currently available on your route. From the Route Map view you can change the order of your route, see detailed street information for each inspection site, post inspection results, and listen to inspection messages. The Route Map does not provide driving instructions to each inspection site, instead it focuses on presenting an overview of inspection locations.

Using the Route Map

After you have created your Route, all inspections will display in the Route Map view. Figure B-1 shows an example of a map showing all inspections from the Route List view.

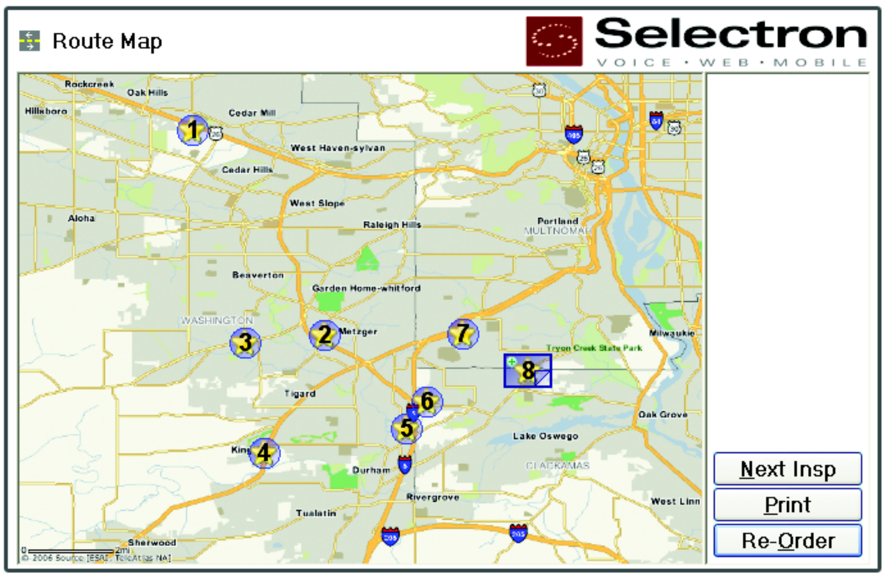


Figure B-1 Route Map with inspections

---

1. The Route Map view is optional functionality and may not be available, depending on how your jurisdiction implemented the InspecTrack system.

Each inspection is indicated by a marker on the map. There are two main marker types, active and inactive. An active marker indicates the currently selected inspection, while the inactive marker applies to all other inspections on the route. However, the active inspection type does have a few variations, depending upon system configurations and specific inspection details. Each marker type is discussed below in Table B-1.

Table B-1 Route Map Marker Types

Marker	Description
	Active inspection marker
	Inactive inspection marker
	Active inspection marker—The speaker icon indicates that a message is associated with the inspection.
	Active inspection marker—The speaker icon with a check mark indicates that the message has been played
	Active inspection marker—The page fold indicates that there are multiple inspections associated with the address
	Inspection location marker on detailed street view map

To make a particular inspection the active inspection, click its marker, or you can click the **Next Insp** button to the right of the map. By clicking **Next Insp**, you can cycle through the inspections one number at a time. As each inspection is selected, it becomes the active inspection.

If the inspection marker has a page-fold in the bottom right hand corner (see Table B-1, marker number 5), multiple inspections are associated with the address. To view all other associated inspections, click the page fold. The next inspection will display in the inspection marker.

Information about the active inspection is displayed in the Inspection Information section below the Route Map. Inspection information includes the permit number, address, inspection type and the schedule note (Figure B-2 on page 79).

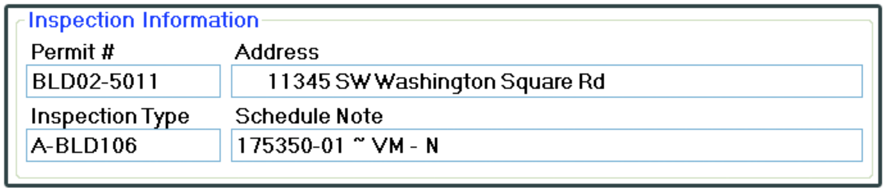


Figure B-2 Inspection Information section

Viewing Detailed Maps

Each inspection on the map has a detailed street view, allowing you to see a close-up look of the inspection address and the surrounding side streets. Additionally, this view displays the inspection's route order number, the address, and the inspection type.

To access this detailed street view, select a marker to activate the inspection and click the zoom icon ( ). The detailed street map will display in the Route Map view (Figure B-3). To return to the main Route Map view, select the zoom out icon ( ) from the top, left-hand corner of the detailed street view.

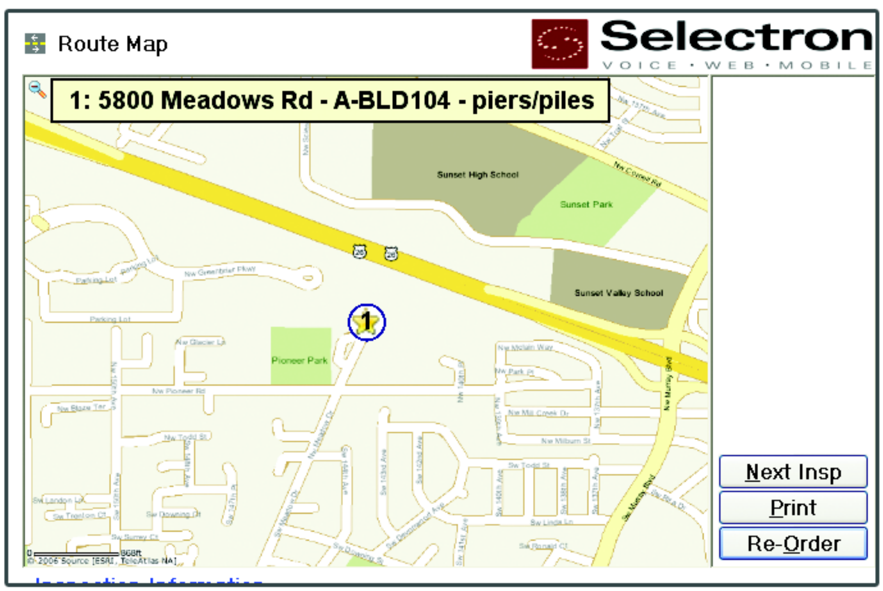


Figure B-3 Detailed street view

Reordering Your Route

Using the Route Map, you are able to reorder your route.

1. Click the Re-Order button.
   All of the inspection markers on the map now have a yellow background.
2. Select the inspection that you want to be first on your route.
   The selected inspection is now the active inspection and has a purple background (indicating that the inspection has been re-ordered).
3. Select the marker for the inspection you want to be next on your route. Repeat this step until you have finished re-ordering your route.

If you select an inspection marker with multiple associated inspections (see Table B-1, marker number 5), the first inspection will be added to your route. To select another inspection at that location, click the marker's book fold to cycle through to the appropriate inspection. Once you have selected the first inspection, the next inspection (associated with the address) will display on the marker, but it won't yet be added to your re-ordered route. You can select that inspection to be the next on the route or choose to select a different marker and come back to the inspection address later in the route.

When coming back to the marker, it will display an inactive marker with the first associated inspection displayed. Select the marker and click the page fold to cycle to the next inspection associated with the address. Click the marker to add the inspection to your route. To ensure that the inspections are in the correct order, click the page fold to cycle through all inspections on the marker.

4. Click Done when you are finished re-ordering the route.

If you select just one inspection icon and click Done, the selected inspection becomes the first on the route, and the rest are pushed back in the original order. In other words, if you move inspection #6 to be the first on the route, #1 will become #2, #2 will become #3, and so on.

Printing a Copy of the Route Map

You may find that a printed copy of the Route Map would be useful as you head out on your route. The printed copy of the Route Map displays the map with the inspection markers, as well as a list of inspection sites and types.

1. Select Print.
   The Page Setup window appears.
2. Configure the printer settings, as necessary.

3. Click **OK**.
   The Print Preview window displays how the map will look when printed.

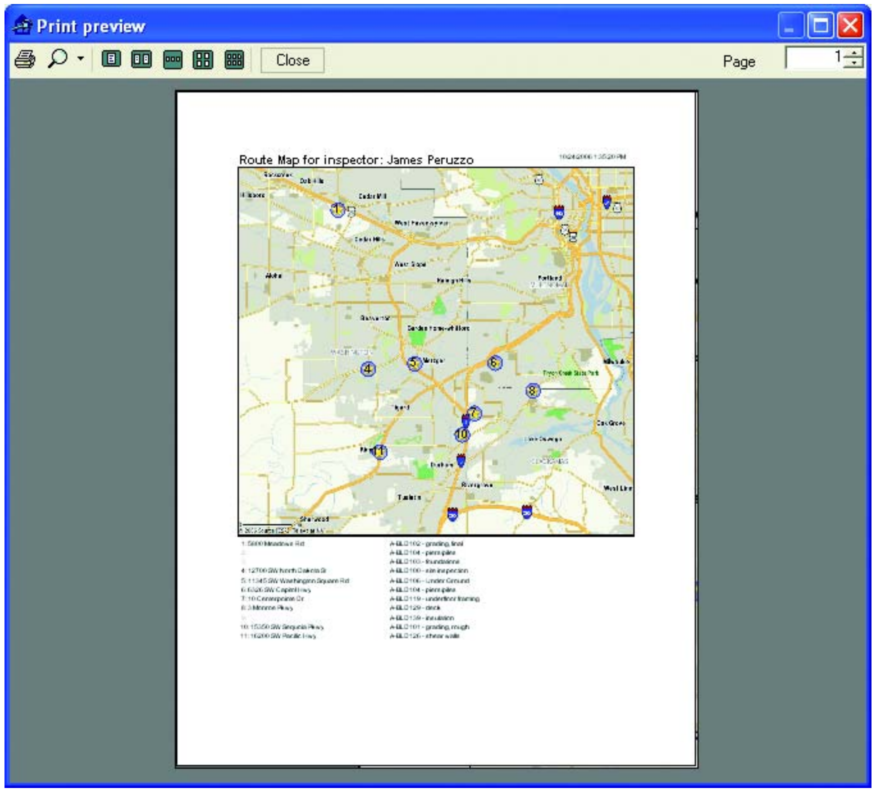


Figure B-4 Print Preview window with map

If the print preview is more than one page, you can use the Page numbered list on the Print Preview menu bar (Figure B-5) to view each page. You can also select various view options so that you can view more than one page in the Print Preview window or zoom in to a particular spot on the map.

Figure B-5 Print Preview menu bar

4. Click the print icon on the Print Preview menu bar.
5. Click **Close** to return to the Route Map view.

Entering Inspection Results with the Route Map View

When using the Route Map view to enter results, click the New Result button to access the Inspection Results Wizard. To enter inspection results using the Wizard, follow the instruction detailed in "Entering Inspection Results" on page 25. You can also double-click the inspection marker on either the main map or the detailed street view map to access the Inspection Results Wizard.

Listening to Inspection Messages

If an inspection has an associated inspection message[1], the active icon will display a speaker icon (Table B-1, marker number three). To listen to the message, click the speaker icon. Once the message has finished playing, the speaker icon will now have a red checklist, indicating that the message has been played (Table B-1, marker number four). Additionally, the speaker icon is available on the detailed street view. For further information on playing inspection messages, see "Listening to Inspection Messages" on page 33.

1. Inspection messages are only available if your jurisdiction is also using the **VoicePermits** Interactive Voice Response (IVR) system from Selectron Technologies.

Digital Photos and Sketches

C

APPENDIX

Imagine that you have come across a violation that you can't sum-up easily when entering your inspection results into Notebook Edition. You may find it useful to have a visual representation of a code violation or inspection result. Notebook Edition allows you to attach digital photos and sketches to a permit, much like attaching a file to an e-mail. These attachments can be added in the field or when you return to the office. Once you have performed a synchronization, other inspectors will be able to view the attachment(s).

This section covers all of the steps needed to attach a digital photo or sketch to a permit[1].

Becoming Familiar with the Attachments View

Any digital photos or sketches attached to a selected permit are displayed in the Attachments view. To access this view, select the Attach task item. The number in parentheses indicates the number of attachments associated with a particular permit. From this task item you can also add, delete, view, edit, and print attachments for a selected permit (Figure C-1 on page 84).

1. Both the **Digital Photo** and the **Digital Sketch** modules are add-ons and may not be available for use, depending on how your jurisdiction decided to set up the InspecTrack system.

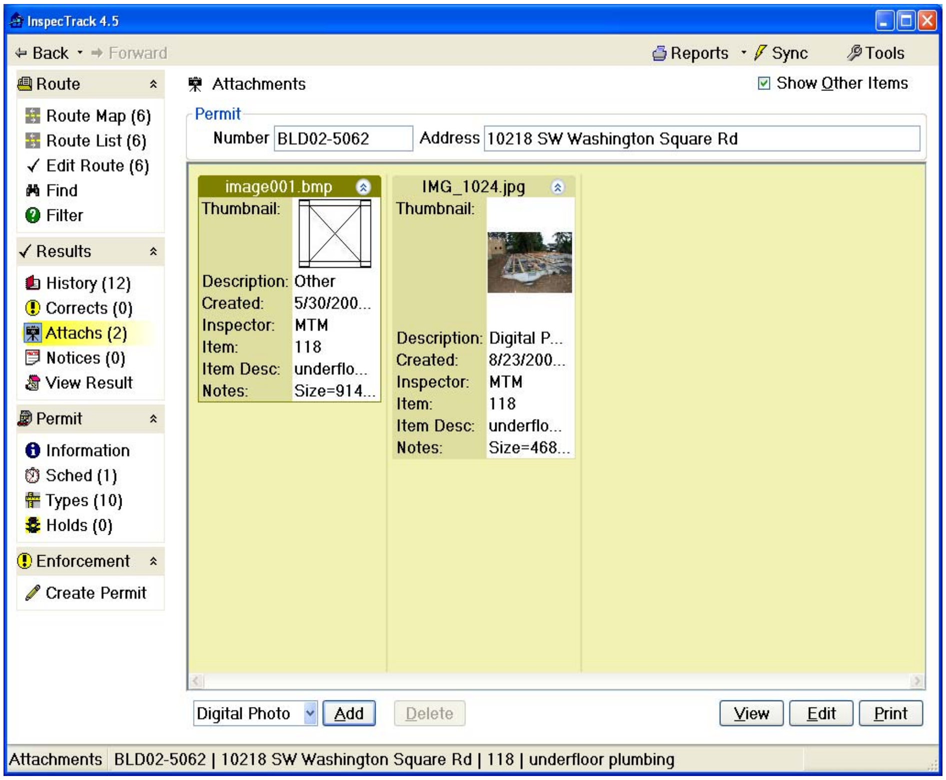


Figure C-1 Attachments view

Any photos or sketches attached to a permit will show up in the Attachments view as thumbnails. A thumbnail is a miniature version of the attachment, allowing you to see the contents of many attachments at once. Along with the thumbnail is information regarding the attachment, which includes file name, description, date created, and inspector (Figure C-2). If the attachment is associated with a correction, the correction, correction text, and correction date fields will also display information.

Figure C-2 Attachment thumbnail

Attaching a Digital Photo or Sketch

During an inspection, you may find that a photo or sketch helps to illustrate a code violation or inspection result. Using the Attach task item, you can easily add an attachment to a permit.

Prior to attaching a photo or sketch, one must exist or be created. Most likely you will want to create one in the field. You will need to use either a digital camera or the sketch application installed on your laptop.

Adding a Photo

1. Select the Attach task item.
   The Attachments window opens.
2. Select Photo from the drop-down list in the bottom left-hand corner.
3. Click Add.
   The Open window appears (Figure C-3).

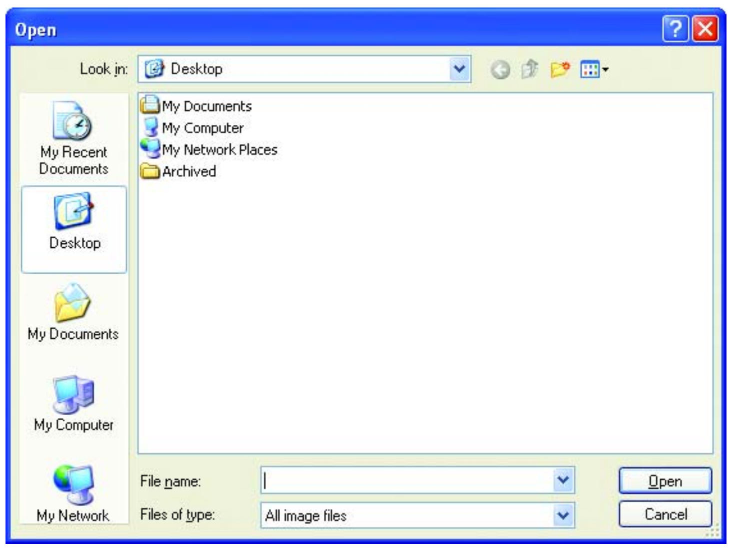


Figure C-3 Open window

4. Browse to the location of the file.
5. Select the appropriate file *and* Click Open.
   The file now appears as a thumbnail in the Attachments window.

Adding a Sketch

1. Select the Attach task item.
   The Attachments window opens.
2. Select Sketch from the drop-down list in the bottom left-hand corner.
3. Click Add.
   The default sketch application opens.
4. Create and save your sketch.

5. Close the sketch application
   The sketch will now be attached to the permit.

Deleting an Attachment

1. Select the Attach task item.
2. Select the attachment that you would like to delete and click Delete.
   The Confirm window appears (Figure C-4).

Figure C-4 Delete confirmation dialog box

3. Click Yes.
   The attachment is removed from the permit.

Viewing an Attachment

1. Choose the Attach task item.
2. Select the attachment that you would like to view and click View.
   The Image Viewer opens, displaying the attachment.

You can view an attachment by double-clicking anywhere on the thumbnail section.

Printing an Attachment

1. Select the Attach task item.
2. Select the attachment that you would like to print.
3. Click Print.
   A copy of the attachment is automatically printed to your default printer. The printed copy will have the photo as well as the date, time, permit number, and address listed. See “Changing your Default Printer” on page 75 for information on changing the printer Notebook Edition uses.

Editing an Attachment

After attaching a photo or sketch to a permit, you may want to edit the attachment. For example, you may want to highlight an aspect of a photo that illustrates a code violation. When choosing to edit an attachment, you can use your sketch application to modify both photos and sketches.

Editing an Attachment

1. Select the Attach task item.

2. Select the photo or sketch you wish to edit and click **Edit**.
   Your sketch application opens with the attachment displayed.
3. Use your sketch application to modify and save the attachment.
   When finished and the attachment is saved, the modified attachment will appear as a thumbnail on the Attachments window.

Adding Attachments using the Inspection Results Wizard

You may also add attachments when you are entering inspection results or marking corrections. After entering inspection results information using the Results view, attachments can be added by clicking the **Attach** button. The Attachments view displays and you may add, delete, view, edit or print attachments. Select the **Show Other Items** check box to view all attachments associated with the permit (Figure C-5).

Figure C-5 Show Other Items check box

When selecting the **Attach** button from the Corrections window, the Attachments view displays. The number on the button indicates the number of attachments associated with corrections. From here, you may add, delete, view, edit, or print attachments. When adding an attachment from here, it will be associated with the correction. Selecting the **Show Other Items** check box allows you to view all attachments associated with the permit, while the **Show other Corrs** check box allows you to view all other correction-associated attachments (Figure C-6).

Figure C-6 Show other Corrections check box

Changing the Default Sketch Application

You may find it necessary to change the sketch application that Notebook Edition defaults to.

Changing the Sketch Application

1. Select Tools from the Navigation Menu bar.
   The Tools window opens with the Settings tab selected (Figure C-7).

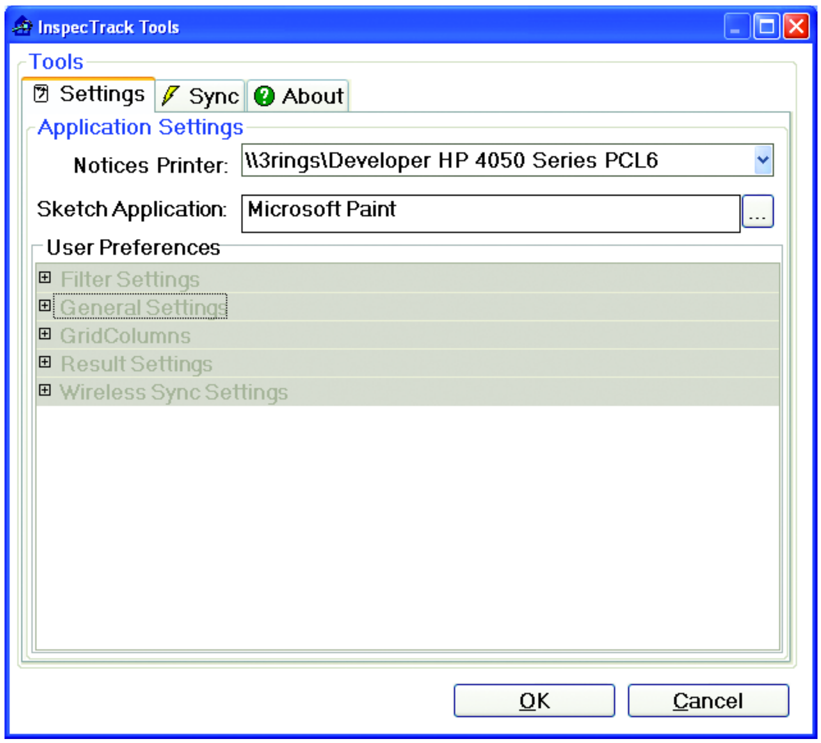


Figure C-7 The Tools window with the Settings tab selected

2. Click the Browse button "..." to the right of the Sketch Application text box.
   The Open window displays.
3. Browse to the correct application.
4. Select the appropriate application and click Open.
   The Tools window now displays the new application in the Sketch Application text box.
5. Click OK.

Code Enforcement

D

APPENDIX

While going about your daily tasks, you may notice a code violation at a site that isn't on your route. Depending on your jurisdiction's business rules, you might want to stop and record a correction for that site. Using Notebook Edition's Find and Filter functionality, as well as the Smart Sync capability, you can search for the permit number associated with the site. If there is no permit associated with the site, you can use the Create Permit task item from the Enforcement task bar to generate permits on the fly[1]. This appendix covers the steps you can take to create a new permit in the field.

Creating a New Permit

1. Select **Create Permit** from the Enforcement task bar.
   The Create Permit view displays (Figure D-1).

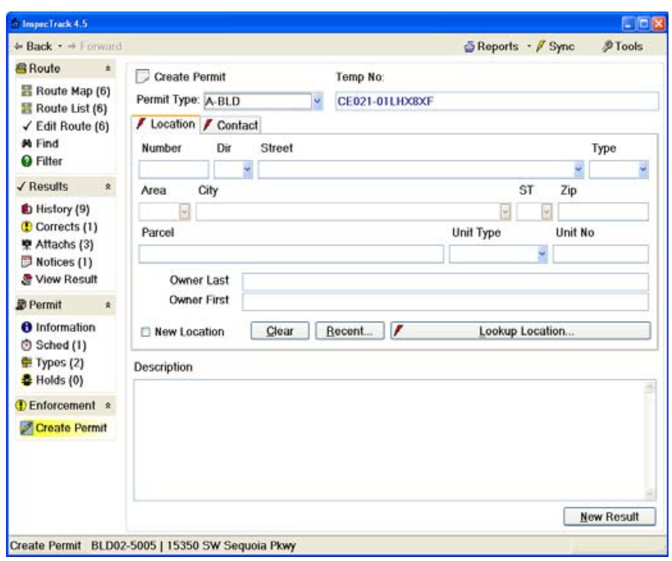


Figure D-1 Create Permit view

1. If the Enforcement task bar is not available, this functionality has not been purchased by your jurisdiction and is not available for use.

2. Every new permit requires a valid location. On the Location tab, select a location by clicking the Lookup Location... button, or check New Location and enter the address information.

3. Every new permit also requires a contact person associated with it. On the Contact tab, select an existing contact by clicking the Lookup Contact... button, or check New Contact and enter (at least) the contact's last name, address, and contact type..

Note that permits must have a location and contact associated with them. If you do not provide all the required information, the errors dialog box (Figure D-2) will inform you of any missing information. Click OK and enter the missing information.

Figure D-2 Errors dialog box

4. Enter information in the Prefix, Direction, Parcel#, and Unit# fields, as well as the Type drop-down list, if necessary. These fields are not required.

5. Enter a description of the code violation in the Description field, if you want to provide additional information regarding the violation.

6. Once finished, click New Result.

You may now enter inspection result information using the Inspection Results wizard— see Chapter 4, Performing Inspections, for more information. When finished entering inspection results, the Route List view displays with the finished inspection added to your route (Figure D-3).

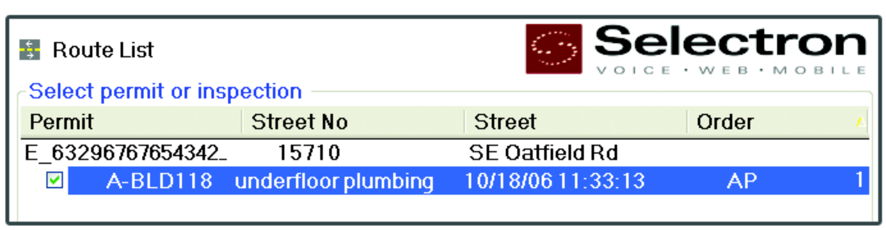


Figure D-3 Route List view with the newly added permit highlighted

Reference

E

APPENDIX

Now that you have used Notebook Edition and are familiar with the basic tasks, you may want to learn more about the buttons that are visible in each Notebook Edition view. Use this section as a reference guide for the functions and buttons that aren't mentioned in the first six sections.

The availability of some buttons depends on whether a permit or inspection is selected, and then, on the inspection status. In other words, different options are available depending if an inspection has been scheduled, completed or synchronized. Nevertheless, button functionality is consistent throughout Notebook Edition. For example, you can expect that the print icon will produce the same results regardless of your current view.

Inspection Results Wizard

The Inspection Results Wizard is a key—and crucial— component of Notebook Edition, and in fact, the entire InspecTrack system. You can access this wizard from almost every view, and use it to enter and update inspection results. Detailed steps on using the wizard can be found under "Entering Inspection Results" on page 25. There are only a few buttons in the Inspections Results Wizard; their functions are very straight-forward.

Cancel

Use Cancel to close the Inspection Results Wizard and return to the previous Notebook Edition view. Changes to the inspection results will not be saved. This option is always available.

< Back and Next >

Use the < Back and Next > buttons to switch back and forth between the Checklists, Results, and Corrections windows of the Inspection Results Wizard. Next > moves you forward from the Checklists window, to the Results window, and then to the Corrections window. < Back returns you back through each window to the Checklists window.

Note that the Checklists, Results, Corrections, and Multi-Result arrows will indicate the active window within the Inspection Results Wizard. The arrow will point to the right when the window is active. Figure E-1 shows examples.

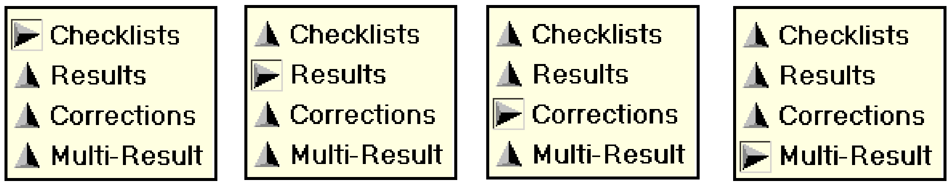


Figure E-1 A right-pointing arrow shows the active window

Attachments

Use the Attach button to open the Attachments window. From there, you may add attachments to the permit, as well as delete, view, edit, or print all attachments. The number in parentheses on the Attach button indicates the number of attachments associated with the permit.

Finish

Use Finish to save changes to the current inspection and close the Inspection Result Wizard. This option is always available.

Checklists Window

The Checklists window is the first window to display in the Inspection Results Wizard when your supervisor has set up a required checklist. Otherwise, it is an optional window, depending upon your jurisdiction's business rules. Using the Checklists window you can complete the checklist using three different types of buttons (additionally, you can manually complete a checklist).

Check All

The Check All button automatically sets all checklist items to 'checked.' This option may not be available, depending on how your jurisdiction has designed checklists.

Uncheck All

Use the Uncheck All button to uncheck all items in the checklist. You may use this when you need to reset a lot of the items, or if your supervisor would rather have you uncheck each item on the checklist (instead of checking each one off). This option may not be available, depending on how your jurisdiction has designed checklists.

N/A All

The N/A All button automatically sets all checklist items to 'not applicable.' This option may not be available, depending on how your jurisdiction has designed checklists.

Corrections Window

You can enter and update corrections through the corrections window in the Inspection Results Wizard. This window has a few additional options; their availability depends on whether or not any corrections have been entered for the selected inspection, and then on the inspection's status. See "Adding Corrections" on page 27 for step-by-step instructions on entering and updating corrections.

Add

Use the Add button to add a correction to an inspection; selecting this button will open the Edit Correction window. This option is always available.

View

The View button opens the Edit Correction window. View is available when an inspection has a correction; if there are no corrections, there is no need to view details. This option is available when viewing corrections that have not been synchronized with the InspecTrack server.

Attachments

Use the Attach button to open the Attachments window. From there, you may add correction-specific attachments to the permit, as well as delete, view, edit, or print all attachments. The number in parentheses on the Attach button indicates the number of attachments associated that are associated with corrections.

Delete

Use Delete to remove a correction. You can only delete corrections that you have created; corrections added by other inspectors cannot be deleted. In addition, corrections cannot be deleted after you perform a synchronization; the Delete button will be dimmed.

Pass All

Use Pass All to change the correction status for all corrections to the passing status. All corrections will be updated to default passing status. This option is available when viewing corrections that have not been synchronized with the InspecTrack server. The button will be dimmed when you select an inspection that has been synchronized.

Edit Correction Window

Use the Edit Correction window to enter and edit correction details. This window is accessed by clicking Add from the corrections window (see above). Please see "Adding Corrections" on page 27 for more information on entering corrections.

Code Book

The Code Book button opens the Code Book Details window. The Code Book Details window displays all relevant code book information associated with a correction. This button is not available if there are no Code Book details associated with the correction.

Add

Use Add to save the current correction, and enter an additional correction for the inspection. This button is always available.

OK

OK saves the currently displayed entry and returns to the Inspection Results Wizard. Use OK after all corrections have been entered.

Cancel

Use Cancel to close the Edit Correction window without saving changes to the current correction. After clicking Cancel, you will return to the Inspection Results Wizard.

Route List View

Use the Route List view to organize your day. There are three buttons in the Route List view: View Permit, New Result, and View Result. View Permit and New Result are active for every permit and inspection; the View Result button is available only for completed inspections.

The current permit and inspection are displayed in the status bar at the bottom of the screen. If you only see a permit in the status bar, this indicates that you don't have an inspection selected.

From the Route List view, double-click on an inspection to go straight to the Inspection Results Wizard.

New Result

The New Result button opens the Inspection Results Wizard in 'New Result' mode. Entering a result while in this mode will create a new inspection result. Use this button when you are updating an inspection after the initial result has been synchronized, or when you are performing a reinspection. This option is always available.

View Result

The View Result button opens the Inspection Results Wizard in edit mode. Results that you enter will be associated with the current inspection.

This option is available for completed inspections that have not been synchronized with the InspecTrack server. When a permit or scheduled (but not completed) inspection is selected, the View Result option is not available. The button will also appear dimmed when you select an inspection that has been synchronized.

View Permit

The View Permit button opens the Inspection History view. From here you can see all inspection activity associated with the permit. This option is always available.

Edit Route View

The Edit Route view is designed to allow you to modify your route. The order of permits and inspections can be changed, and inspections can be removed. This is particularly helpful if you don't want to have a particular inspection included on your route. Within this view, there are six buttons, plus the advanced search feature.

Move Up

The Move Up button moves an inspection closer to the first position on your route. If you click Move Up, an inspection that is currently third on the route, will move up to second. This option is always available. See "Changing the Inspection Order Manually" on page 22 for step-by-step instructions on changing the order of inspections in your route.

Move Down

The Move Down button moves an inspection closer to the last position on your route. If you click Move Down, an inspection that is currently third on the route, will move down to fourth. This option is always available. See "Changing the Inspection Order Manually" on page 22 for step-by-step instructions on changing the order of inspections in your route.

Order as Shown

Use the Order as Shown button to reset the order number to match the current order displayed in the display window. This is helpful if you sort inspections by permit number, type, or address, and want the display to match the sort order. Immediately after you use this option to re-order inspections, the button will be dimmed; it will be available if you sort by column. See "Changing the Sort Order" on page 23 for step-by-step instructions on using the Order as Shown button.

Save Route Changes

Use the Save Route Changes button to save the changes you've made to the route order. This option is always available. If you don't save your route changes before leaving the Edit Route view, the Save Changes dialog box will open (as shown in Figure E-2).

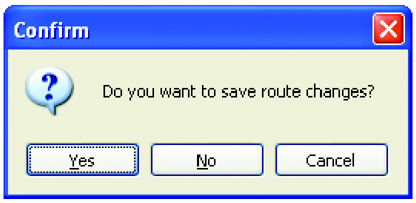


Figure E-2 Save Route Changes dialog box

Add Current Activity

The Add Current Activity button lets you add any permit you have entered results for during your current session. This option is useful if you accidentally clear your route after performing inspections and would like to re-add them to your route. In other words, any inspections that have been "checked-off" will reappear on the Route List view.

Filter

The Filter... button opens the Filter window. Please refer to "Building a Route" on page 15 for step-by-step instructions on using the Filter function. For detailed information about Filter functions, please see "Filter Window" on page 98. Filter... is always available.

Search

Use the show>> and hide<< toggle buttons to access, or hide, the search area. Search is useful when many inspections are displayed and you would like to find an inspection without scrolling through the display. If Notebook Edition finds a permit or inspection within the Edit Route view that matches your search criteria, the matching permit, or inspection, will be selected.

Find View

Using the Find view you can search for a specific inspection by permit number, area, street number, street, type, and description. The Find view contains the search feature, as well as Find and Save Route buttons (see Figure E-3). Please see "Add Permits to your Route" on page 20 for information on using the Find view.

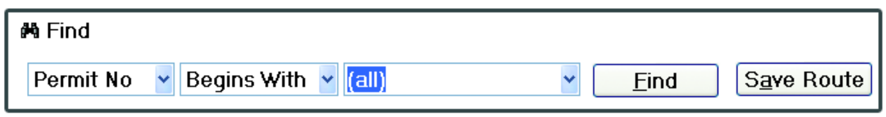


Figure E-3 Find view search area

Find

Use the Find button after you have set your search parameters in the search area. Notebook Edition will find all matching inspections. After Notebook Edition performs a search, this option is unavailable. You need to enter new search parameters in the search area for the button to be active.

Save Route

After you find, and then select, the inspections that you want to add to your route, use the Save Route button to save changes. After you select an inspection, Save Route becomes available.

Search Options

The search options in the Find view search area is similar to the Filter and Edit Route search areas. See "Add Permits to your Route" on page 20 for information on finding permits or inspections.

Filter Window

The Notebook Edition Filter is designed to assist your search for groups of inspections based on scheduled dates, permit types, permit areas, and inspections types. In addition to the search area, the Filter window has five buttons: Clear All, Load Defaults, Save as Default, OK, and Cancel. These buttons are always available. For more information on using the Notebook Edition Filter, see "Building a Route" on page 15.

Clear All

The Clear All button removes all selected filters in the Filter window. This option is useful when you have applied many filters and would like to remove them all so that you can have a fresh start.

Load Defaults

The Load Defaults button loads your saved default filters with a single click. Use this option in conjunction with the Save as Default button.

Save as Default

The Save as Default button saves the currently applied filters as the default setting. These options will be loaded each time the Filter dialog box is opened. For example, if you frequently search for a specific permit and inspection type within a date range, you may want to make those the default settings.

OK

The OK button tells Notebook Edition to search for inspections using the applied filters. The results are displayed in the Filter view.

Cancel

Use the Cancel button to close the filter window and return to the previous view.

Filter View

To see the Filter view, you first need to apply filters through the Filter window. This view works in conjunction with the Filter window and displays the results of your search. You can also see which filters were applied to the search.

Filter Summary

Use the show>> and hide<< toggle buttons to access, or hide, the Filter Summary. The summary is useful when you want to see what filters have been applied to a search (see Figure E-4). For example, far fewer results than you expect may be displayed. By checking in the summary, you can check to see if additional filters were applied.

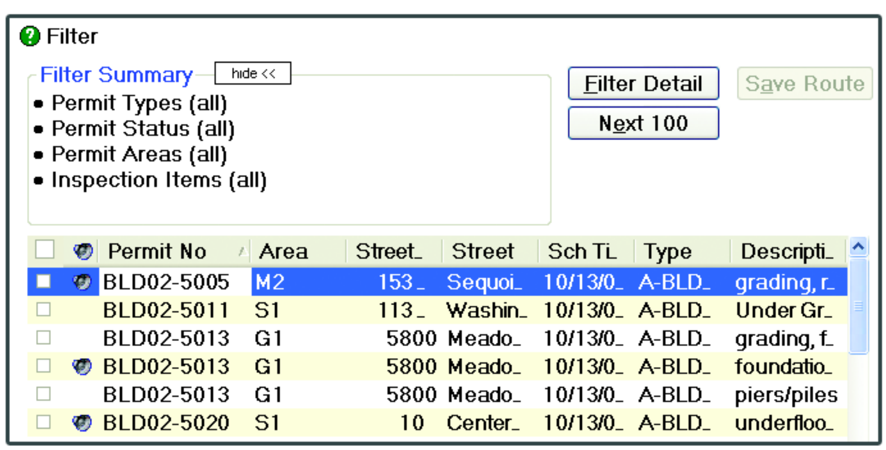


Figure E-4 Filter view with results and applied filters displayed

Filter Detail

The Filter Detail button opens the Filter window. Use this option when you want to modify the filters applied during a search. This button is always available.

Save Route

Use Save Route to save the selected inspections to your route. The button will be dimmed if no inspections have been selected.

Next 100

The Filter view displays the first 100 inspections that match the criteria you searched for. Use the Next 100 button to view the next group of 100 inspections. This option is only available if there are more than 100 inspections found during the Filter process.

Inspection History

Use the Inspection History view to check inspection status. This view displays a list of completed inspections, and their status, for the selected permit. It's a quick way to see if an inspection has passed or failed. Once Notebook Edition has been synchronized with the InspecTrack server, completed inspections cannot be changed, however, a new result can be entered. There are three options in this view: Delete, New Result and View Result. Their availability depends on the inspection's status.

From the Route List view, double-click on an inspection to go straight to the Inspection History view.

Delete

The Delete button removes the selected inspection from the inspection history. You can only delete inspections that you have created. In addition, inspections cannot be deleted after you perform a synchronization; the Delete button will be dimmed.

New Result

The New Result button opens the Inspection Results Wizard in 'New Result' mode. Entering a result while in this mode will create a new inspection result. Use this button when you are updating an inspection after the initial result has been synchronized, or when you are performing a reinspection. This option is always available.

View Result

The View Result button opens the Inspection Results Wizard in edit mode. Results that you enter will be associated with the current inspection.

This option is available for completed inspections that have not been synchronized with the InspecTrack server. When a scheduled (but not completed) inspection is selected, the View Result option is not available. The button will also appear dimmed when you select an inspection that has been synchronized.

Corrections View

From the Corrections view, you can quickly see any corrections associated with the selected permit. This is a useful reference tool that consolidates all corrections for a particular inspection in one place. There are three options in this view: Delete, New Result and View Result; their availability depends on the inspection's status. You can also set the view to display only failed corrections.

Note that the Corrections view, which is accessed using the Corrects. task item, is not the same as the correction window in the Inspections Result Wizard. For more information on using the Corrections view, see "Reviewing Corrections" on page 49.

Delete

The Delete button removes the selected correction from the Corrections view. You can only delete corrections that you have created. In addition, corrections cannot be deleted after you perform a synchronization; the Delete button will be dimmed.

New Result

The New Result button opens the Inspection Results Wizard in 'New Result' mode. From the Inspection Result Wizard, a new correction can be entered. See "Adding Corrections" on page 27, for more information on entering a correction. Use this button when you are updating an inspection's correction after the initial result has been synchronized, or when you are performing a reinspection. This option is always available.

View Result

The View Result button opens the correction window of the Inspection Results Wizard in edit mode. From the Inspection Result Wizard, a new correction can be entered. Corrections that you update will be associated with the current inspection. See "Updating Corrections" on page 30, for more information on updating a correction.

This option is available when viewing corrections for inspections that have not been synchronized with the InspecTrack server. The View Result button will also appear dimmed when you select an inspection that has been synchronized.

View Failing Corrections Only

Select the "Show failing corrections only" check box if you only want failing corrections to be visible. This may be useful to you if failing corrections will need to be corrected before a reinspection can pass.

Notices View

The Notices view is a little different than the other Notebook Edition views—correction and inspection notices are not automatically displayed in this view. Instead, you can add notices as needed—typically when you want to leave a notice at an inspection site. In this view, you can choose to Add, Delete, Print and View notices. The Add button is always available, but the availability of the other options varies. For more information on working in the Notices view, please see “Viewing a Notice or Correction” on page 75.

Add

As it sounds, you use the Add button to add a notice to the Notice view. Before you click Add, you need to select a notice type— correction or inspection—and location in the Add Notice area. An example of this is shown in Figure E-5.

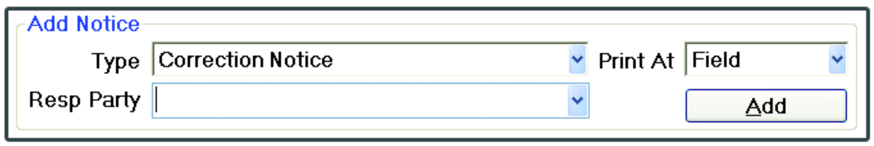


Figure E-5 Add Notice section of the Notices view

Delete

The Delete button removes the selected notice from the Notices view. You can only delete notices that you have added; you cannot remove notices added by other inspectors. In addition, notices cannot be deleted after you perform a synchronization; the Delete button will be dimmed.

Print

Use the Print button to print the selected notice to the Field, the Office, or both. Logically, there must be a notice in the view for the Print button to be available. If Field is selected, the notice will be immediately printed to the printer attached to your field computer. When Office is selected, the notice will print in your office, after Notebook Edition is synchronized with the InspecTrack server. Note that the InspecTrack Administrator will need to run a report to generate the printout.

View

The View button opens the notice in an easy-to-read format. Please refer to Appendix A, Using Reports, for details on using the report navigation bar.

Sync Window

The Notebook Edition synchronization feature is critical to the accurate functioning of the InspecTrack system. You must establish a TCP/IP connection for the sync function to work. Generally, daily syncs can be performed over a wireless or dial-up connection because a relatively small amount of data is being transferred. A large amount of data is transferred during a weekly sync; you will probably want to use a high speed connection (i.e. LAN). Chapter 6, Updating Notebook Edition, discusses the step-by-step procedures for performing daily and weekly synchronizations.

Details

Use the Details button to see synchronizations details (as shown in Figure E-6). This dialog box will display the last sync time, the last subset build, and the number of permits that are ready to be uploaded. Click OK to close the Details box and return to the Sync window.

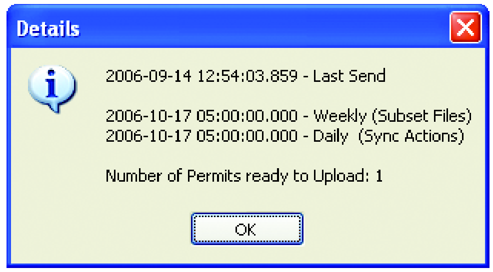


Figure E-6 Sync Details dialog box

Daily

Use the Daily button to initiate a daily synchronization; this should be performed at least once a day. Daily syncs are designed to upload recent inspection activity from your field computer to the InspecTrack server, and conversely to download updates from the server to Notebook Edition.

Weekly

The Weekly button initiates a weekly synchronization. This type of sync is meant to refresh the Notebook Edition database on your field computer, and replace it with fresh data subsets from the InspecTrack server.

Exit

Use Exit to close the Sync window and return to your previous Notebook Edition view. This option is available before you start a sync, and after a synchronization is complete.

Lookup/Download

The Lookup/Download button is for accessing the SmartSync Lookup view (see below). This option is always available.

Send Results

Use the Send Results button to send specific inspection information to the InspecTrack server, rather than sending all inspection results. This option is always available.

Smart Sync Lookup View

The SmartSync function allows you to lookup specific permits on the InspecTrack server that are not located on Notebook Edition.

Lookup

Once you have configured all the Smart Sync search criteria, you can use the Lookup button to search the InspecTrack server. The Smart Sync will display the first 10 records matching the search criteria.

More

You may use the More button to display additional records matching the Smart Sync search criteria. The Smart Sync view displays 10 criteria-matching records at a time.

Clear All

The Clear All button removes all records from the Smart Sync view's search results display field.

Download Selected Items

Once you have selected all of the records you wish to download to Notebook Edition, you may select the Download Selected Items button to begin the process. If there are a number of records to be downloaded, you may be prompted to confirm the download.

Add to Route

Use the Add to Route check box to add all newly downloaded inspections to your route. This option is always available.

Close

The Close button returns you to the Sync window.

Tools Window

Through the Tools window you can control some Notebook Edition settings, including the printer to which your reports and summaries will be sent. You can also change your remote server and test the connection. Tools options are accessed via the Settings, Sync and About tabs. There are two buttons, OK and Cancel, which are always available.

Settings Tab

Use the Settings tab to change your selected printer. Notebook Edition uses your field computer's default printer unless you select another printer. Your computer's default printer is controlled by Microsoft Windows®. You can add printers to your computer by navigating to the Control Panel and selecting Printers. Contract your System Administrator for additional help with Windows.

You can also use the Settings tab to change the sketch application. Click the browse button and navigate to the new application.

Sync Tab

The Sync tab is the first place you should look if you have problems synchronizing Notebook Edition with the InspecTrack server. On this tab you can verify that the name of the remote server is correct, as well as test your connection to the server with the Test Remote Server option. If your local database has become corrupt, you can rebuild it using the Reset local database button. These buttons are described in more detail below.

- The Test Remote Server button will test the connection between your field computer and the InspecTrack server. The connection status will be displayed in the panel; examples of the three possible connections messages are shown below. Figure E-7 is an example of a successful connection. An active connection to the remote server is indicated by the IsDatabaseAvailable=True message. This indicates that your field computer has a TCP/IP connection, and that the InspecTrack server is running. If you do not have a TCP/IP connection, you will be unable to connect to the server and will see the message displayed in Figure E-8. Finally, if there is a problem on the InspecTrack server, you will see the error in Figure E-9.

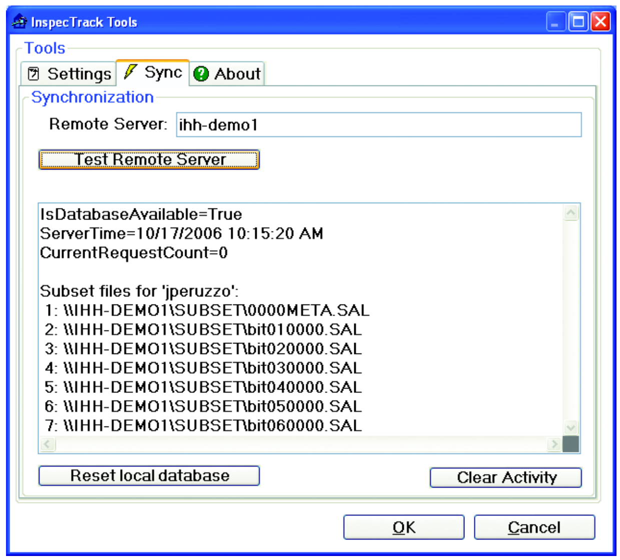


Figure E-7 Sync tab showing successful connection to remote server

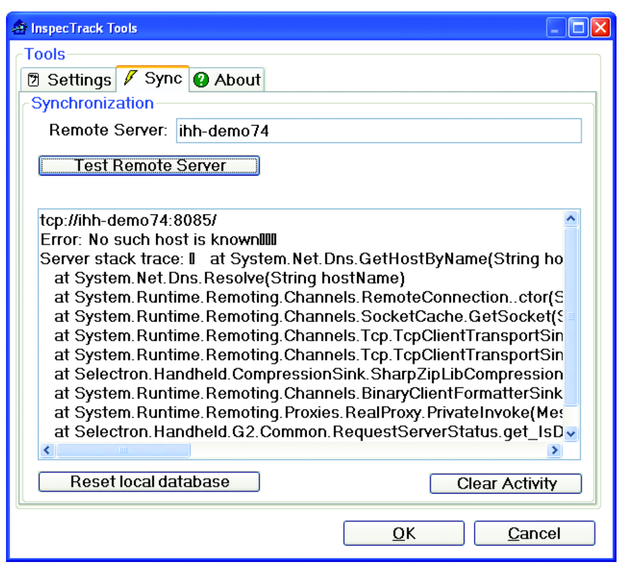


Figure E-8 Sync tab displaying no connection to remote server message

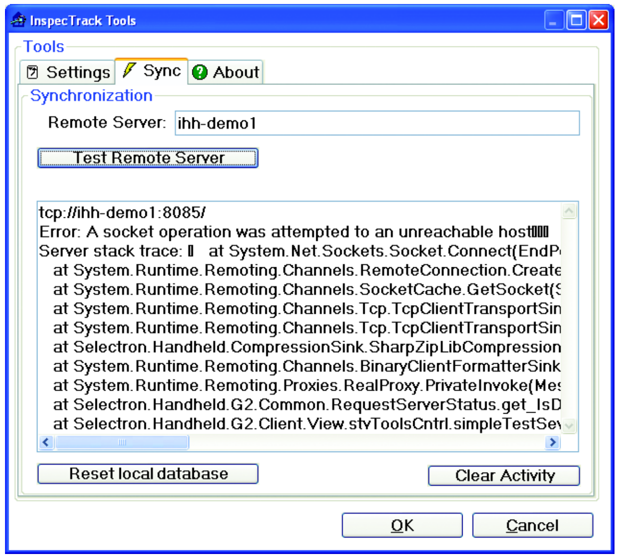


Figure E-9 Sync tab showing an error on the remote server

- Use the **Reset local database** button to rebuild the database on your computer. This is particularly useful if the data on your field computer is corrupt, or if it seems to be out-of-sync even after you have synchronized Notebook Edition with the InspecTrack server. See "Refreshing Notebook Edition Data" on page 62 for more information about performing this action.

- Use the **Clear Activity** button to clear results, corrections, notices, and all other data entered since the last sync. This might be useful when you feel the information entered for the day has been corrupted and needs to be reentered.

About Tab

The About tab is similar to the About option on any software application. This screen details the product version and provides copyright information.

Types View

The Types view is a good place to see all inspections that are associated with a particular permit. Both scheduled and completed inspections are shown. An inspection type will only be listed once, so if an inspection failed, and needed to be rescheduled, you will not see two listings for that type in the Types view. There are five buttons in this view; their availability depends on the status of the selected inspection.

Some permitting databases will not accept new inspection types that are added in the field unless the new inspection types has a result associated with it.

Delete

The **Delete** button removes the selected inspection type from the Types view. You can only delete an inspection type that you have added. In addition, corrections cannot be deleted after you perform a synchronization; the **Delete** button will be dimmed.

Caution! If an inspection type is deleted from the Type view, all inspections of that type that are associated with the selected permit will be deleted. You can only delete inspections that you create in the field. In addition, inspections cannot be deleted after you perform a synchronization.

Add Type

The **Add Type** button opens the Add New Type window. Use this when you want to create a new inspection while out in the field. This option is always available.

Route

The **Route** button allows you to add the selected inspection to your route.

Schedule

Schedule opens the Schedule Inspection window; use this button to schedule an existing inspection. This option is frequently used in conjunction with the **Add Type** button. See "Scheduling New Inspections" on page 50 for more details on how to schedule an inspection. The **Schedule** button is always available.

New Result

The **New Result** button opens the Inspection Results Wizard in 'New Result' mode. Use this button when you are updating an inspection after the initial result has been synchronized, or when you are performing a reinspection. This option is always available.

View Result

The **View Result** button opens the Inspection Results Wizard in edit mode. From the Inspection Result Wizard, an inspection result can be modified. See "Updating Corrections" on page 30, for more information on updating a correction.

This option is available when viewing inspections that have not been synchronized with the InspecTrack server. The **View Result** button will appear dimmed when you select an inspection that has been synchronized.

Schedule View

The Schedule view provides a quick reference to the number of inspections that are scheduled for the selected permit. While at an inspection site, this can be an easy way of determining whether there are any other upcoming inspections. There are four buttons in this view: Delete, Schedule New, New Result and View Result. The availability of these options depends on the inspection status. See "Schedule New Inspection" on page 50 for more details on how to schedule an inspection.

Delete

The Delete button removes the selected inspection type from the Schedule view. You can only delete an inspection that you have scheduled. In addition, inspections cannot be deleted after you perform a synchronization; the Delete button will be dimmed.

Schedule New

Schedule New opens the Schedule Inspection window; use this button to schedule a new inspection. The Schedule button is always available.

New Result

The New Result button opens the Inspection Results Wizard in 'New Result' mode. Use this button when you are updating an inspection after the initial result has been synchronized, or when you are performing a reinspection. This option is always available.

View Result

The View Result button opens the Inspection Results Wizard in edit mode. From the Inspection Result Wizard, an inspection result can be modified. See "Updating Inspection Results after Synchronization (Performing a Reinspection)" on page 26, for more information on updating an inspection.

This option is available when viewing inspections that have not been synchronized with the InspecTrack server. The View Result button will appear dimmed when you select an inspection that has been synchronized.

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