InspecTrack™ Notebook Edition

Connecting Citizens to Digital Government

Mobile Inspection System

SUPERVISOR'S MANUAL

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Selectron Technologies, Inc.
7405 SW Tech Center Drive
Suite 140
Portland, OR 97223
(866) 878-0048, (503) 443-1400
www.selectrontechnologies.com

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Getting Started

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CHAPTER

Welcome to Selectron Technologies' InspecTrack™ Mobile Inspection System—the mobile inspection system used by Community Development agencies. The InspecTrack system provides an improved method of data collection and delivery in the field, so it reduces the amount of time inspectors 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 field application. The field application has two versions: Notebook Edition™ and Pocket Edition™. This manual is geared towards jurisdictions who are using InspecTrack Notebook Edition.

InspecTrack Notebook Edition is installed on field computers and is the software that inspectors use on a daily basis to track inspections. Much of Notebook Edition functionality is controlled through the InspecTrack Administration and Supervisor Tools. This manual is a guide to using the Supervisor Tool. For questions regarding the Administration Tool, refer to the InspecTrack Administrator's Manual.

Administrator and Supervisor Responsibilities

InspecTrack system administration has two management roles—an administrator and a supervisor—which allow for an easy division of responsibilities. The administrator is responsible for monitoring the overall system performance, as well as performing regular system maintenance. The supervisor role should be filled by the person who manages inspectors, and this person should be familiar with both the inspection process and the permitting database. The supervisor is responsible for managing the daily interaction of inspectors and inspection data with the InspecTrack system.

Responsibilities of the Administrator

The InspecTrack administrator's responsibility is to ensure the proper operation of the InspecTrack system. Frequently a staff member from the jurisdiction's IT department is assigned to this role. The administrator is responsible for regularly performing the following tasks:

- Updating the InspecTrack system information that is used by both the permitting database and the field application
- Troubleshooting basic problems

Responsibilities of the Supervisor

While the administrator is responsible for the overall functioning of the InspecTrack system, the supervisor is responsible for monitoring inspectors' interaction with the InspecTrack system. Usually the inspectors' supervisor occupies this role. Depending on your jurisdiction's implementation of InspecTrack, the supervisor may be responsible for assigning specific inspections to inspectors and creating inspector routes.[1] The following tasks must be performed on a daily basis:

- Monitor InspecTrack's daily activities
- Print inspection reports
- Run reports to document InspecTrack system use
- Assign inspections and create routes (if applicable to your jurisdiction)

About this Manual

The InspecTrack Supervisor Manual is designed to serve as a guide for supervisors managing the inspectors who are using Notebook Edition. The manual was designed with self-contained, task-oriented sections for quick use. Many of the tasks will have been previously explained when the system was installed. This manual was designed both to support previously instructed users, as well as serve as a guide to beginning users.

Becoming Familiar with the System Tools

On the left-hand side of the Supervisor Tool is a sidebar containing tool sets. Each tool set expands to reveal options that allow you to perform tasks. The number of options in each tool set depends upon the feature set licensed for your system. As you select the different options, their respective panels appear in the window on the right side of the Supervisor Tool. An example of the Supervisor Tool is shown in Figure 1-1 on page 5. An example of available tool sets is shown in Figure 1-2 on page 5, with the Setup tool set expanded to show available options.

1. By default, InspecTrack Notebook Edition allows inspectors to create their own routes, although jurisdictions may choose to require supervisors to assign inspections. (InspecTrack Pocket Edition always requires supervisors to assign inspections and create inspector routes.)

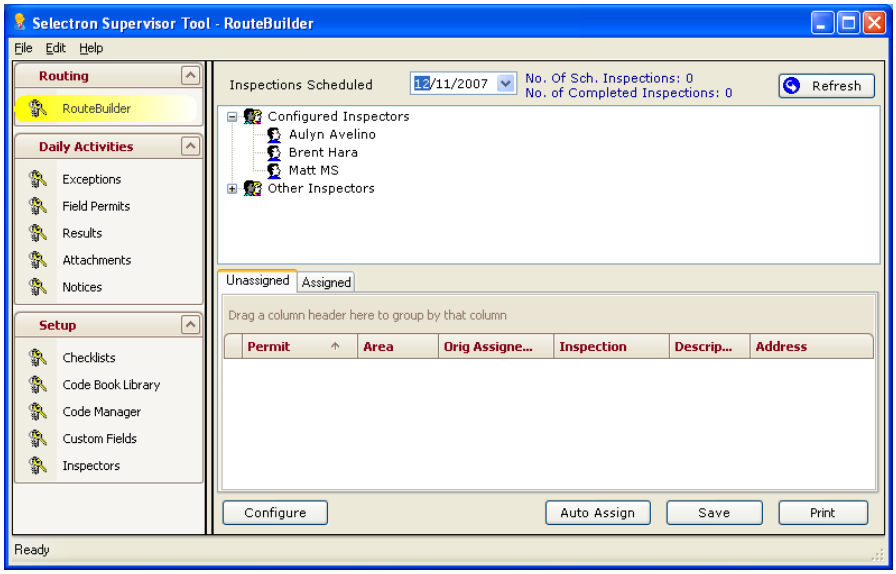


Figure 1-1 Supervisor Tool

Figure 1-2 Supervisor tool sets; the Setup tool set has been expanded to show options

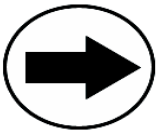
Format Conventions Used in this Manual

Format

In this manual, words in bold represent InspecTrack buttons. 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.



Black arrows point to shortcuts you can take when using the Supervisor Tool.

Creating Inspector Accounts 2

CHAPTER

When setting up the InspecTrack system, you need to create inspector accounts. Each inspector must have an InspecTrack account in order to update InspecTrack Notebook Edition on their field computers. In addition, each inspector account needs to be associated with at least one data subset—each subset directly corresponds with a permit type; you assign sub-sets as part of the inspector account creation process. In other words, you can set up inspectors to only receive specific permit types that have been assigned to them.

Inspector accounts allow inspectors to use Notebook Edition. Refer to your InspecTrack Administrator's Manual for assistance on creating administrative accounts for InspecTrack.

Creating and Deleting Inspector Accounts

As the InspecTrack supervisor, you must create user accounts for inspectors before they attempt to synchronize their field computers with the InspecTrack server. In addition, new inspector accounts need to be created as inspectors are hired, and old accounts should be deleted when inspectors leave your organization.

Creating an Inspector Account

1. Choose Inspectors from the Setup tool set.
   The Inspector Setup panel displays (Figure 2-1 on page 8).

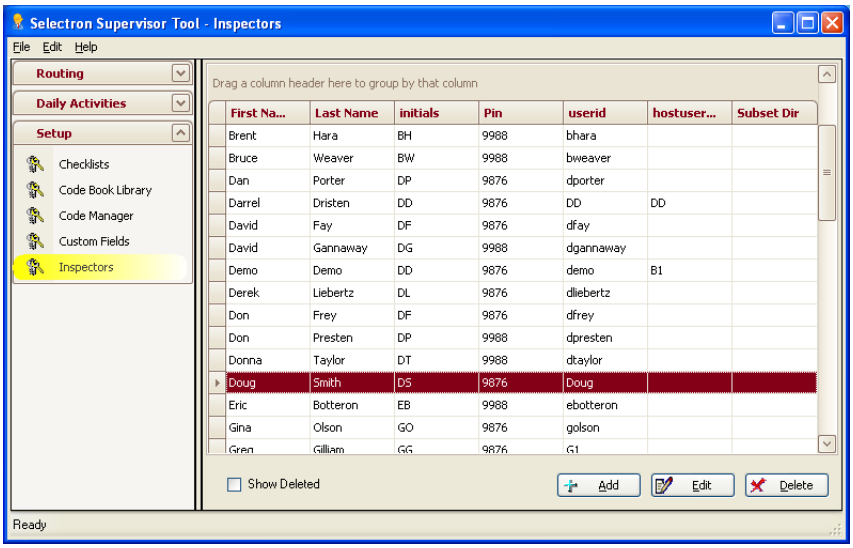


Figure 2-1 Inspector Setup panel

2. Click **Add**.
   The Add window opens (Figure 2-2).

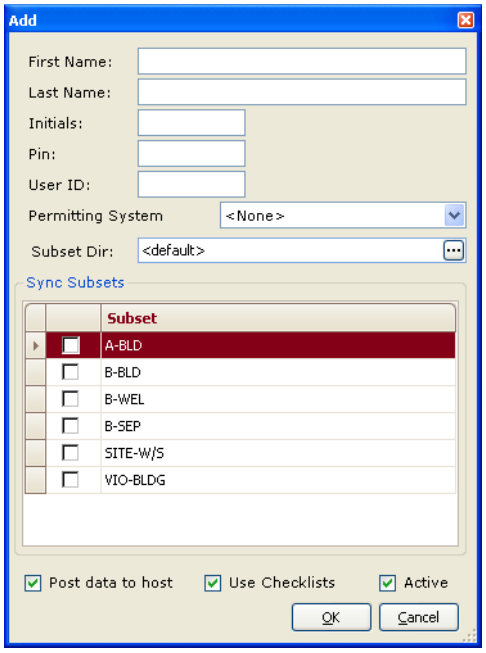


Figure 2-2 Add window

3. Enter the inspector's first name, last name, initials, PIN and user ID in the appropriate fields.

The user ID must be the same as the inspector's authenticated network logon. Without the correct user ID, the inspector will not be able to use InspecTrack Notebook Edition.

4. Select the inspector's permitting system ID from the Permitting System User drop-down field.

It's a good idea to set up inspector accounts in the permitting database prior to setting them up in the Inspector Setup panel. This allows the system to pull information from the 'HostUserID' field and populate the Permitting System User drop-down when adding an inspector to the InspecTrack system. If inspectors are not set up, InspecTrack will simply use the initials field for inspector identification.

5. Select the subsets (permit types) that the inspector account should be associated with.

Each subset identifies a group of inspections, such as building or electrical. Inspectors must have at least one subset assigned to them in order to download inspection data onto their field computer. After synchronizing their field computers, inspectors will only see inspection data from their assigned subsets. Limiting the subsets assigned to inspectors prevents an electrical inspector from seeing plumbing inspections, for example.

6. Select the Active check box to enable the inspector account.
7. Select the Post data to host check box to enable the inspector account to post information back to the permitting database.
8. Select the Use Checklists check box if checklists have been configured for your system. For more information on checklist configuration see "Managing Checklists" on page 71.
9. Click OK.
   The new inspector appears in the Inspector Setup panel.

Deleting an Inspector Account

1. Choose Inspectors from the Setup tool set.
2. In the panel window, select the inspector account you wish to delete and click Delete.
   The Delete Confirmation dialog box appears.
3. Click Yes.
   The inspector disappears from the Inspector Setup panel.

After deleting an inspector account, the inspector will no longer be able to synchronize their field computer with the InspecTrack server.

Viewing Deleted Inspector Accounts

Once you have deleted inspector accounts, they will not appear in the Inspector Setup panel. If you would like to view all deleted inspector accounts, select the Show Deleted check box. By selecting the check box, you toggle the Inspector Setup panel to only show deleted accounts.

Re-Adding a Deleted Inspector Account

You may find that you need to re-add a deleted inspector account. This may occur if you accidentally delete an account or an inspector returns to work at your jurisdiction.

1. From the Inspector Setup panel, select the Show Deleted check box.
2. Select the deleted account and click UnDelete.
   The account is now added to the active list of inspectors.

The number of active inspectors is displayed on the bottom, left-hand corner of the Inspector Setup panel. This number will change as you add, delete, or re-add inspectors.

Editing an Inspector Account

When you edit an inspector account, you are changing information in an already existing account. By editing an inspector account, you can change subsets or enter a new PIN without having to create an entirely new inspector account.

Editing Inspector Subsets

1. Choose Inspectors from the Setup tool set.
   The Inspector Setup panel displays.
2. Select the inspector account you wish to edit and click Edit.
   The Edit dialog box opens (Figure 2-3 on page 11).

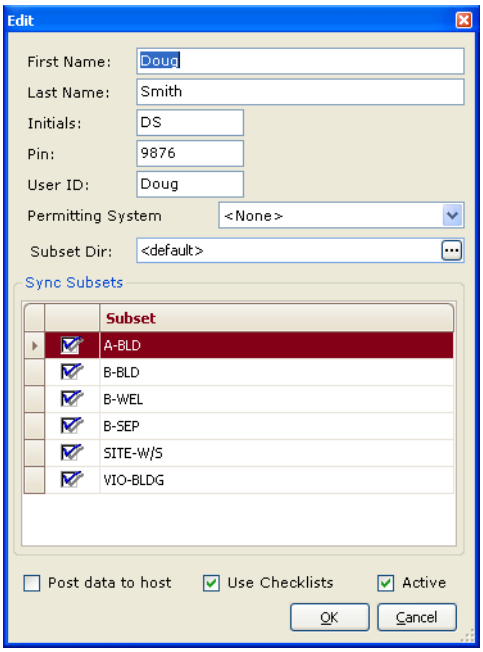


Figure 2-3 Edit dialog box

3. Using the check boxes, add or remove subsets as necessary and click OK.

Editing an Inspector PIN

1. Choose Inspectors from the Setup tool set.
2. Select the inspector account you wish to edit and click Edit.
   The Edit dialog box opens.
3. Modify the inspector PIN and click OK.

RouteBuilder

3

CHAPTER

When RouteBuilder functionality is utilized, supervisors can control route assignment using the Supervisor Tool. The created route is loaded onto the inspectors' field units and they no longer need to worry about route creation. RouteBuilder allows you to set up a filter to 'auto-assign' inspections, or you may choose to assign routes manually. If you decide not to use RouteBuilder, inspectors can still create their routes using Notebook Edition.

RouteBuilder Overview

The Route Builder interface is divided into two sections: the Inspectors view and the Inspections view. The Inspectors view displays all inspectors who have had accounts created using the Inspector Setup panel.

The Inspections view displays all inspections that have been scheduled in the permitting database and whether or not they have been assigned to an inspector or if they are unassigned. Figure 3-1 shows the RouteBuilder panel with both views displayed; the top half of the panel is the Inspector view, while the lower half contains the Inspections view. This section provides an overview of both views.

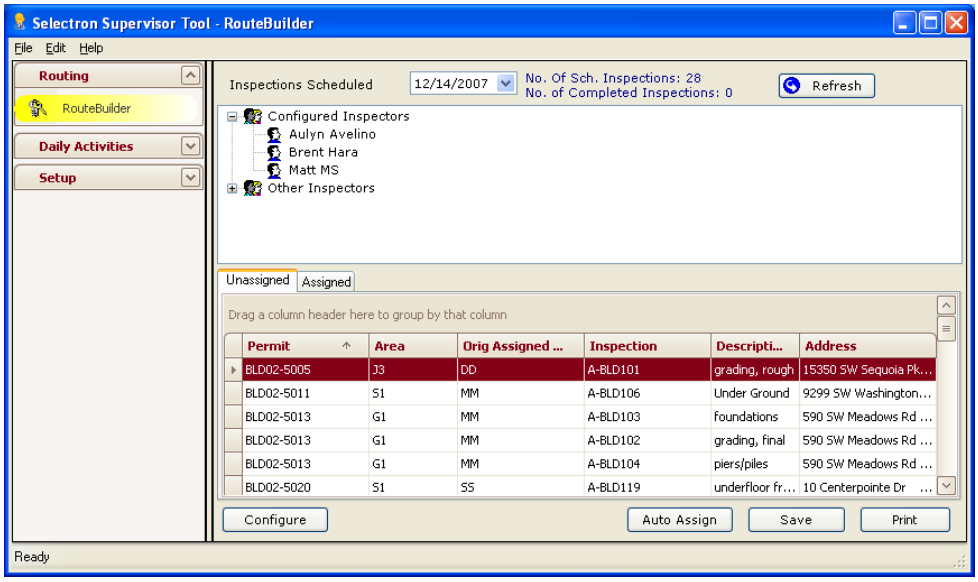


Figure 3-1 RouteBuilder panel

Inspectors View

The Inspector View provides a visual representation of all inspectors that have been set up using the Inspector Setup panel (see Chapter 2, Creating Inspector Accounts). Inspectors are grouped into two categories: Configured and Other. Inspectors in both categories can have inspections assigned; the difference is that 'configured' inspectors have been set up for RouteBuilder's auto-assignment functionality (see "Auto-Assigning Inspections" on page 17).

To view a list of inspectors in either category, expand the appropriate header icon (Configured Inspectors or Other Inspectors). If there are no inspectors set up, you will be unable to expand the header. Figure 3-2 shows an example of an expanded Configured Inspectors header.

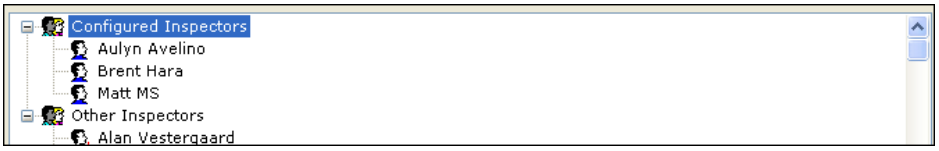


Figure 3-2 Expanded 'Configured Inspectors' header

When an inspector has inspections assigned, the number of inspections will appear to the right of the individual inspector's icon ( ) and name. To view the details of each assigned inspection, expand the inspector icon and name. Figure 3-3 on page 14 shows an example of an expanded inspector icon.

Figure 3-3 Expanded inspector icon

To get expanded assignment information, double-click an inspection below the inspector icon. The Assignment Inspection Details dialog box appears (Figure 3-4).

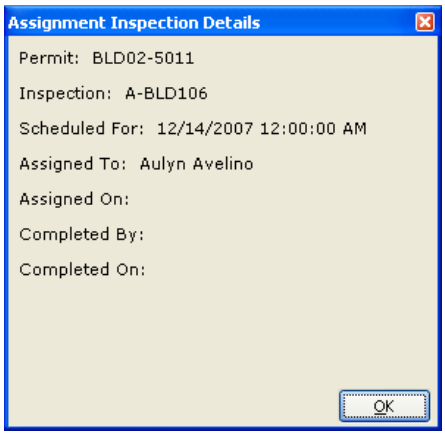


Figure 3-4 Assignment Inspection Details dialog box

Inspections View

The Inspections view displays all inspections that have been scheduled in the permitting database. These inspections are grouped into two categories: Unassigned and Assigned.

The Unassigned tab shows all inspections that have been scheduled in the permitting database, but have not been assigned in RouteBuilder. The information displayed on this tab includes the permit number, the original inspector assignment in the permitting database (if applicable), inspection type, description, address, and area (if applicable). Figure 3-5 on page 15 shows an example of the Unassigned tab.

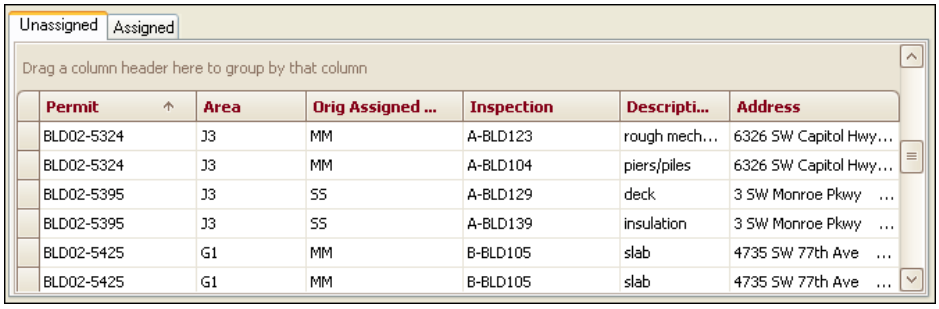


Figure 3-5 Unassigned tab

The Assigned tab shows all inspections that have been assigned using RouteBuilder. The information displayed on this tab includes the permit number, the original inspector assignment from the permitting database (if applicable), inspection type, address, area (if applicable), and the assigned inspector. Figure 3-6 shows an example of the Assigned tab with assigned inspections.

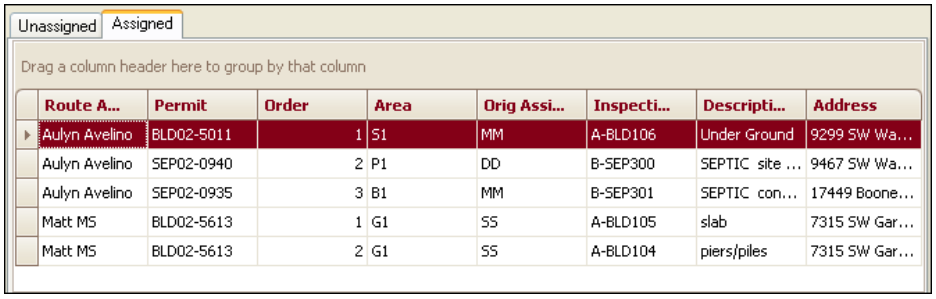


Figure 3-6 Assigned tab

You can also sort the information in the Assigned tab by the assigned inspector (or any other column header). Click and drag the Route Assigned column header to the area above the table. Figure 3-7 on page 16 shows an example of the Assigned tab with inspections grouped by assigned inspector.

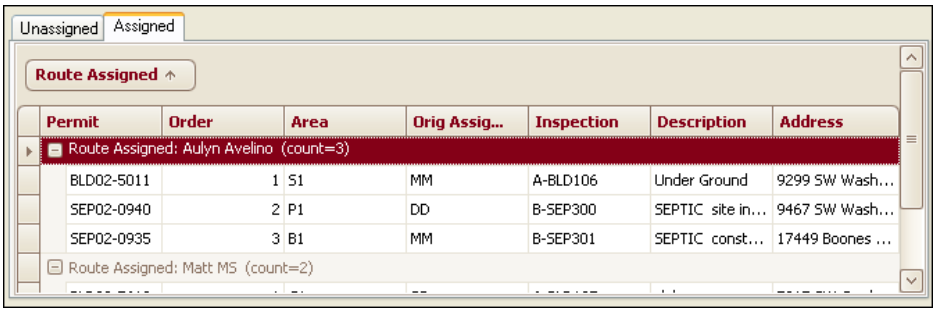


Figure 3-7 Assigned tab grouped by assigned inspector

Assigning Inspections Manually

When using RouteBuilder, you will want to assign inspections prior to inspectors performing their daily syncs. One option is to assign each inspection manually; this allows you to evaluate each inspection individually and assign it to a specific inspector.

Assigning Inspections Manually

1. Choose RouteBuilder from the Routing tool set.
2. Select the appropriate date from the Inspections Schedule For drop-down calendar. By default, the current date is selected.

The total number of scheduled inspections appears at the top of the RouteBuilder panel.

3. From the Unassigned tab, select the inspection you wish to assign.
4. Click and drag the inspection to the appropriate inspector icon in the Inspector view.
   The number indicator to the right of the inspector icon increases by one.

To drag multiple inspections, control-click each inspection that you wish to assign. Then click and drag one inspection to the appropriate inspector icon—all selected inspections will be assigned.

5. Repeat the process for all inspectors and inspections.
6. Click Save when finished.
   Once inspectors perform their daily syncs, they will receive their assigned routes. These routes are displayed in the Route List view of Notebook Edition.

Once you have assigned inspections to inspectors, you may need to reorder the inspection list. Simply click and drag inspections into the order you wish.

Auto-Assigning Inspections

RouteBuilder has a built-in auto-assign feature that automatically assigns inspections for you. To auto-assign inspections, you will need to configure filter criteria for each inspector. Once you've assigned the criteria, you can have RouteBuilder create routes automatically.

Configuring Filter Criteria

You can set RouteBuilder to assign inspections using certain criteria. There are three filtering options available: Assigned, Area, and Inspection Types. You can choose to filter by one criteria, or use any other combination. If different inspectors are configured similarly, RouteBuilder balances out the number of inspections assigned to each inspector.

1. Choose RouteBuilder from the Routing tool set.
2. Click Configure.
   The RouteBuilder Configuration window displays (Figure 3-8).

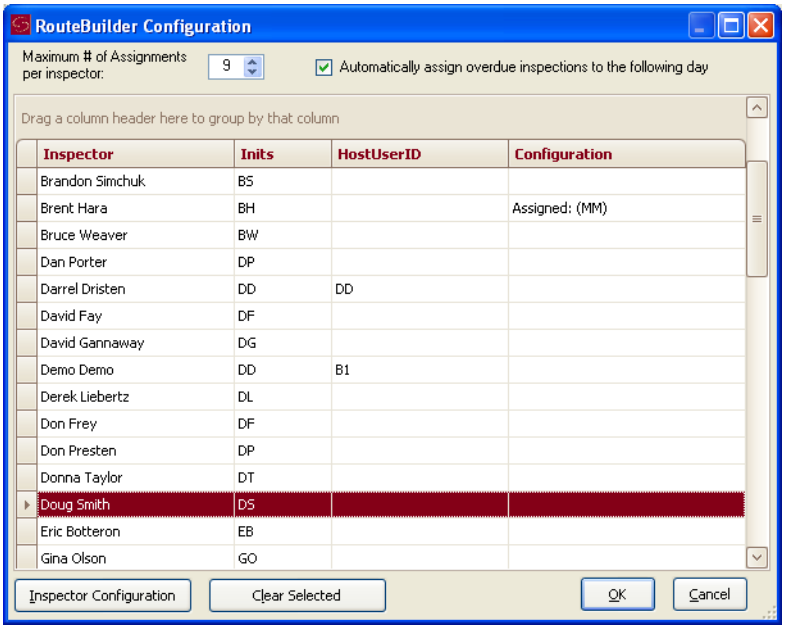


Figure 3-8 RouteBuilder Configuration window

The RouteBuilder Configuration window displays all active inspector accounts that have been set up using the Inspector Setup panel (see Chapter 2, Creating Inspector Accounts). Information displayed includes the inspector name, initials, HostUserID, and RouteBuilder Configuration settings. Only inspectors who have been configured for RouteBuilder's auto-assignment functionality will have information in the Configuration column.

3. Select the inspector you wish to configure for auto assignment and click **Inspector Configuration**.
   The Inspector Configuration window displays (Figure 3-9).

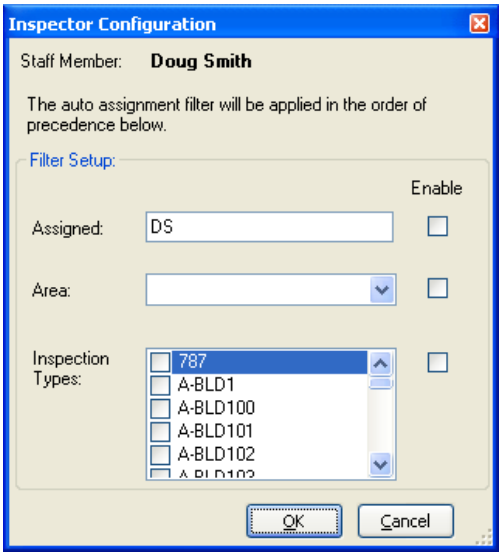
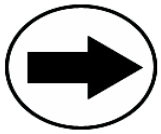


Figure 3-9 Inspector Configuration window



To access the Inspector Configuration window, you can also double-click an inspector name.

4. Select the Enable check box for each filter you wish to use.
5. Configure each selected filter appropriately. For more information on setting these filters, see the following sections:
   - To configure the Assigned field, see "Filtering By Assigned" on page 20
   - To configure the Area field, see "Filtering by Area" on page 20
   - To configure Inspection Types, see "Filtering by Inspection Type" on page 20
6. Click OK when finished.
   The inspector is now set up for auto-assignment and the inspector icon is now displayed under the Configured Inspectors header (Configured Inspectors).

Note that the inspector icons listed under the Configured Inspectors are blue ( ), while inspector icons listed under Other Inspectors are red ( ).

Filtering By Assigned

The Assigned field filters by the Assigned To field in the permitting database. To configure this field, enter the inspector's ID from the permitting database. This is the ID you entered when configuring the Permitting System User field when setting up the inspector's account in the Inspector Setup panel (see Chapter 2, Creating Inspector Accounts). If this field is not available in the permitting database, or has not been configured, enter the inspector's initials you used when setting up the inspector account.

If you want to configure more than one ID (or set of initials) for an inspector, enter each additional ID separated by a comma (with no additional spaces). This might be useful when an inspector is on vacation and another inspector (or inspectors) is covering for the absence. Figure 3-10 shows an inspector configured for three different IDs.

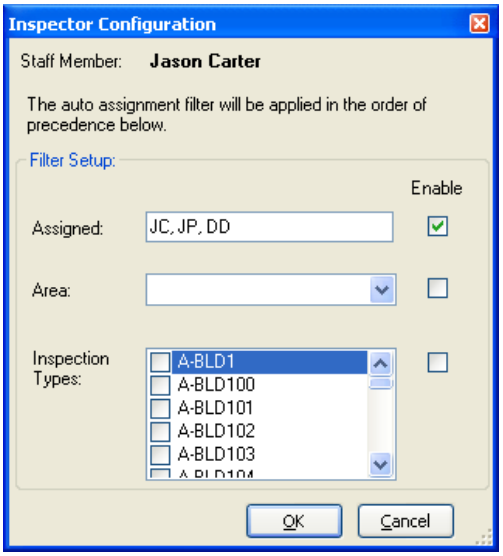


Figure 3-10 Assigned filter set to three separate IDs

Filtering by Area

The Area field filters by the area that has been set up in your permitting database. To assign a specific area to an inspector, select the area from the drop-down selection list. If the area is unavailable, type the area into the drop-down field. If you would like to assign more than one area to an inspector, separate each area value by a comma (with no additional spaces). As you add values to this field, they will be added to the drop-down selection list.

Filtering by Inspection Type

The Inspection Type field allows you to auto-assign specific inspection types to an inspector. Only inspection types associated with an inspector's subsets (permit types) are available for selection. When filtering by inspection type, select the check box for each inspection type that you would like assigned to the inspector.

Configuring the Auto-Assign Process

Once you've configured each inspector, you may want to configure some general settings for the auto-assign process.

1. Choose RouteBuilder from the Routing tool set.
2. Click Configure.
   The RouteBuilder Configuration window displays.
3. Select the maximum number of assignments per inspector using the Maximum # of Assignments selection list.
4. Select the Automatically assign overdue inspections to the following day check box if you want inspections that were not completed the previous day to be added to the current route for the inspector.
5. Click OK when finished.

Auto-Assigning Inspections

Once you have set up inspectors in RouteBuilder (see "Configuring Filter Criteria" on page 17) and configured the auto-assign process (see "Configuring the Auto-Assign Process" on page 21), you can have the system automatically assign inspections.

1. Choose RouteBuilder from the Routing tool set.
2. Select the appropriate date from the Inspections Scheduled For drop-down calendar. By default, the current date is selected.
3. Click Auto-Assign.
   Inspections are assigned following the criteria you established for each inspector. Once inspectors perform their daily sync, they will receive their assigned route. This route is displayed in the Route List view of Notebook Edition.

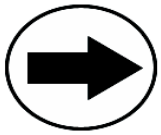
Once you have assigned inspections to inspectors you may need to reorder the inspection list. Simply click and drag inspections into the order you wish.

Reassigning Inspections

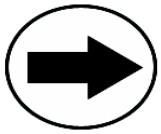
Whether you have manually assigned inspections, or used RouteBuilder's auto-assign feature, you may want to reassign inspections. When reassigning inspections, make sure that the Unassigned tab is showing in the Inspections view.

1. From the Inspectors view, find the inspector you wish to remove an inspection from and expand the inspector icon.
2. Click and drag the inspection to the Unassigned tab.
   The inspection appears in the grid on the Unassigned tab.
3. In the Inspector view, find the inspector icon you wish to assign the inspection to.

4. Click and drag the inspection from the Unassigned tab to the inspector icon. The number of assigned inspections for that inspector increases by one.
5. Repeat for all inspections you wish to reassign.
6. Click Save Route when finished.



Instead of dragging the inspection to the Unassigned tab, you can drag the inspection from one inspector icon to another. This only works when both inspector icons are visible in the Inspectors view, however. You may also reassign inspections from the Assigned tab in the same way.



If you wish to unassign all inspections from an inspector, click and drag the inspector icon to the Unassigned tab. All the associated inspections will then be unassigned. To unassign every inspection from every inspector, click and drag the correct header (Configured Inspectors or Other Inspectors) to the Unassigned tab.

Printing the Inspection Route

You may find it necessary to have a hard copy of each inspector's route assignment. RouteBuilder allows you to print route assignment details for a specific date or by a date range.

1. Choose RouteBuilder from the Routing tool set.
2. Click Print.
   The Route Report Options window displays (Figure 3-11).

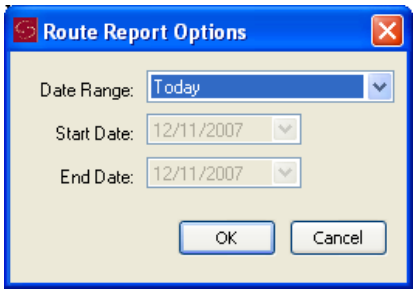


Figure 3-11 Route Report Options window

3. Select the appropriate date (or date range) from the Date Range drop-down list.
4. If you selected the custom date range option, select the start and end dates from the Start Date and End Date drop-down calendars.
5. Click OK.
   The Report Preview window displays. Each inspector's route will be visible on a separate page. For more instructions on using the Report Preview window, refer to Appendix A, Report Preview Guide.

Using the Code Manager

4

CHAPTER

After performing an inspection, inspectors enter results into InspecTrack Notebook Edition. When entering results, InspecTrack displays a list of pre-defined inspection results from which inspectors can choose the appropriate entry. Similarly, when inspectors want to enter correction information for an inspection, all correction codes and results have been pre-defined and are available on their field computers. These pre-defined lists ensure that data is entered in a standard and consistent manner.

As a supervisor, you are responsible for defining and entering the inspection and correction results, as well as defining the list of inspection types, correction codes and location information. Use the Code Manager to enter and manage this data.

Defining Inspection Results

To ensure that all inspectors enter standard results, the results must be pre-defined. The inspection result codes must exactly match the codes that are stored in your permitting database. For instance, if "DONE" is defined in your permitting database as meaning that an inspection has passed, then "DONE" must be entered into the Code Manager. When an inspector synchronizes Notebook Edition with the InspecTrack system, the inspection result, along with the appropriate code, is uploaded to your permitting database.

Entering Inspection Result Codes

1. Choose Code Manager from the Setup tool set.
   The Code Manager panel displays (Figure 4-1 on page 26).

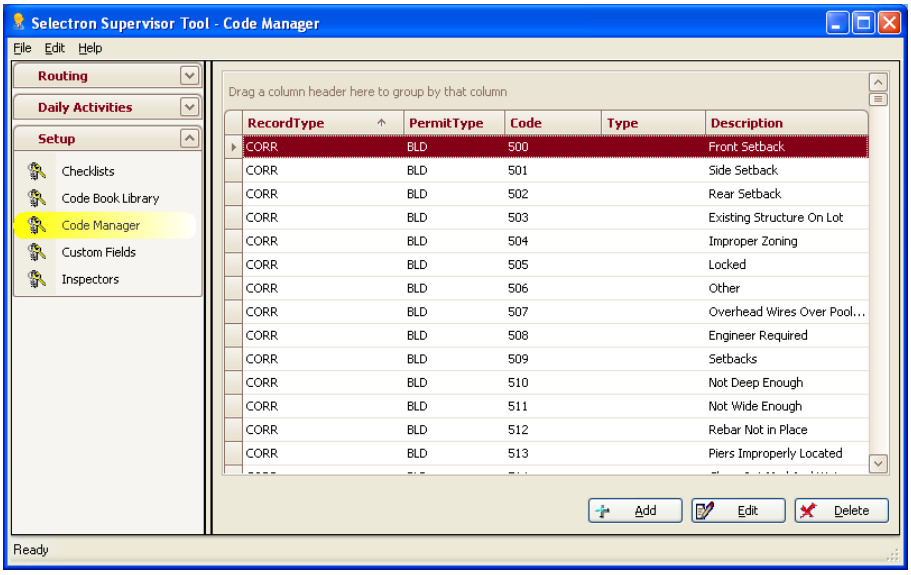


Figure 4-1 Code Manager

2. Click Add.
   The Add Code window opens (Figure 4-2).

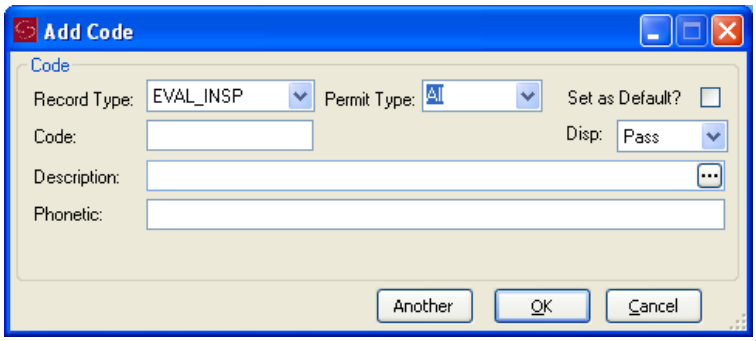


Figure 4-2 Edit Code dialog box

3. Select EVAL_INSP from the Record Type drop-down list.
4. Enter a specific permit type, that this result applies to, in the Permit Type field. If the result applies to all types, type, or select, ALL.

A permit type must be entered in order for the code to be added to the Code Manager. As stated above, if you are not using a specific permit type for inspection results, enter ALL.

5. Enter the inspection result in the Code field. This is unique to your jurisdiction, although an example might be PASS or FAIL. This result should be defined in your permitting database.
6. Enter a description in the Description field.

Descriptions entered in the Description field are visible in InspecTrack Notebook Edition and make it easier for inspectors to quickly choose an inspection code. This is especially helpful if your inspection result is an abbreviation whose meaning may not be immediately clear.

7. Set the disposition status using the Disposition drop-down menu.
8. Select the Set as Default check box if you want to set a default setting for an inspection result. Setting a default for a permit type allows inspectors to choose the most commonly used option, saving time in choosing the appropriate result.

9. Click OK.
   The inspection result is displayed in the Code Manager.

To enter additional inspection result codes, click Another instead of clicking OK. This leaves the Add Code window open and the correct Record Type selected. When finished adding codes, click OK to close the Add Code window.

Editing Inspection Results

1. Choose Code Manager from the Setup tool set.
2. Select the inspection result that you want to edit and click Edit.
   The Edit Code window opens.
3. Edit the fields that you want to change and click OK.

Deleting Inspection Results

1. Choose Code Manager from the Setup tool set.
2. Select the inspection result that you want to delete and click Delete.
   The Delete Confirmation dialog box opens (Figure 4-3).

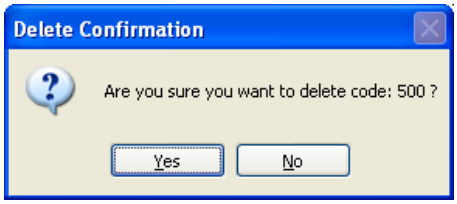


Figure 4-3 Delete Confirmation dialog box

3. Click Yes.
   The inspection result is removed from the Code Manager.

Defining Correction Results (or Correction Dispositions)

Inspectors use a pre-defined list of correction results (or correction dispositions) to indicate a correction's status. You need to define the correction results that are available for use by using the Code Manager. Unlike inspection results, correction results (or dispositions) are not stored in the permitting database.

Entering Correction Result Codes

1. Choose Code Manager from the Setup tool set.
2. Click Add.
   The Code Editor dialog box opens (Figure 4-4).

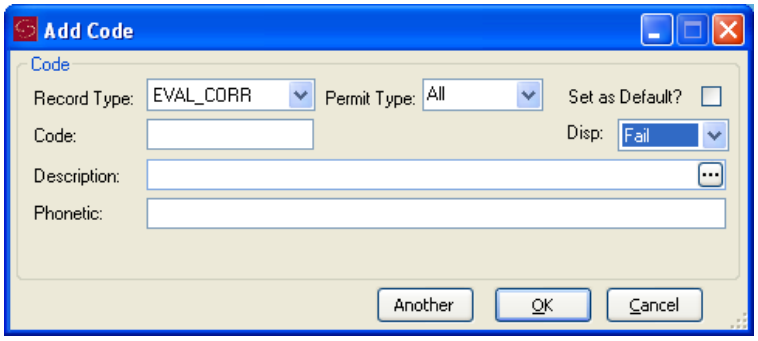


Figure 4-4 Edit Code dialog box

3. Select EVAL_CORR from the Record Type drop-down list.
4. Enter a specific permit type, that this correction result applies to, in the Permit Type field. If the result applies to all types, type, or select, ALL.

A permit type must be entered in order for the code to be added to the Code Manager. As stated above, if you are not using a specific permit type for correction results, enter ALL.

5. Enter the correction result in the Code field. This is unique to your jurisdiction, although an example might be PASS or FAIL. Some jurisdictions also use codes to indicate partial approval.
6. Enter a description in the Description field.

Descriptions entered in the Description field are visible in InspecTrack Notebook Edition and make it easier for inspectors to quickly choose a correction result. This is especially helpful if your correction result is an abbreviation whose meaning may not be clear, such as 'PA' for partial approval.

7. Set the disposition status using the Disposition drop-down menu.
8. Select the Set as Default check box if you want to set a default setting for a correction result. Setting a default for a permit type allows inspectors to choose the most commonly used option, saving time in choosing the appropriate result.
9. Click OK.
   The correction result is displayed in the Code Manager.

To enter additional correction result codes, click Another instead of clicking OK. This leaves the Add Code window open and the correct Record Type selected. When finished adding codes, click OK to close the Add Code window.

Editing Correction Results

1. Choose Code Manager from the Setup tool set.
2. Select the correction result that you want to edit and click Edit.
   The Code Editor opens.
3. Edit the fields that you want to change and click OK.

Deleting Correction Results

1. Choose Code Manager from the Setup tool set.
2. Select the correction result that you want to delete and click Delete.
   The Delete Confirmation dialog box opens.
3. Click Yes.
   The correction result is removed from the Code Manager.

Defining Inspection Types

Frequently there are multiple types of inspections associated with each permit. These inspection types need to be defined in the Supervisor Tool by using the Code Manager.

Entering Inspection Types

1. Choose Code Manager from the Setup tool set.
2. Click Add.
   The Add Code window opens (Figure 4-5).

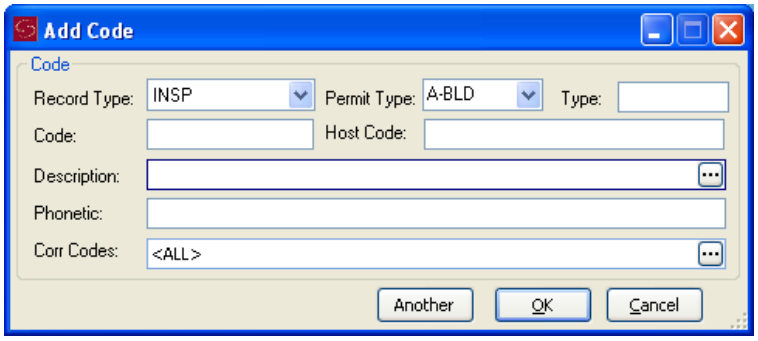


Figure 4-5 Add Code window

3. Select INSP from the Record Type drop-down list.
4. Enter a permit type in the Permit Type field.

If you have an Accela Tidemark Advantage database, the permit type is located in the Case Type field. If you have an Accela 'PERMITS' Plus database, the permit type is located in the Composition Type field.

5. If necessary, enter data in the Type field.

Jurisdictions using an Accela Tidemark Advantage database must enter data from the Activity Code field in the Code Manager's Type field. Jurisdictions utilizing other databases may ignore the Type field.

6. Enter the inspection code number in the Code field.

The code entered in the Code field must match the codes in your permitting database. For example, if you have an Accela Tidemark Advantage database, enter the code from the Activity Code field. If you use Accela 'PERMITS' Plus, enter the code from the Item ID field.

7. Enter a description in the Description field. Descriptions entered here are visible in InspecTrack Notebook Edition and make it easier for inspectors to quickly enter inspection information.

8. Click OK.
   The inspection type is displayed.

To enter additional inspection types, click Another instead of clicking OK. This leaves the Add Code window open and the correct Record Type selected. When finished adding codes, click OK to close the Add Code window.

Associating Correction Codes with an Inspection Type

While you are adding an inspection type, you can choose to associate specific correction codes with it. When inspectors add a correction to the inspection type in the field, only the specified correction codes will be available.

1. Follow steps 1-7 in "Entering Inspection Types" on page 29.
2. If you want to associate all correction codes with the inspection type, leave ALL selected in the Corr Codes field. Otherwise, continue to step 3 below.
3. Click the Corr Codes browse button (…).
   The Select Inspection Codes window displays (Figure 4-6).

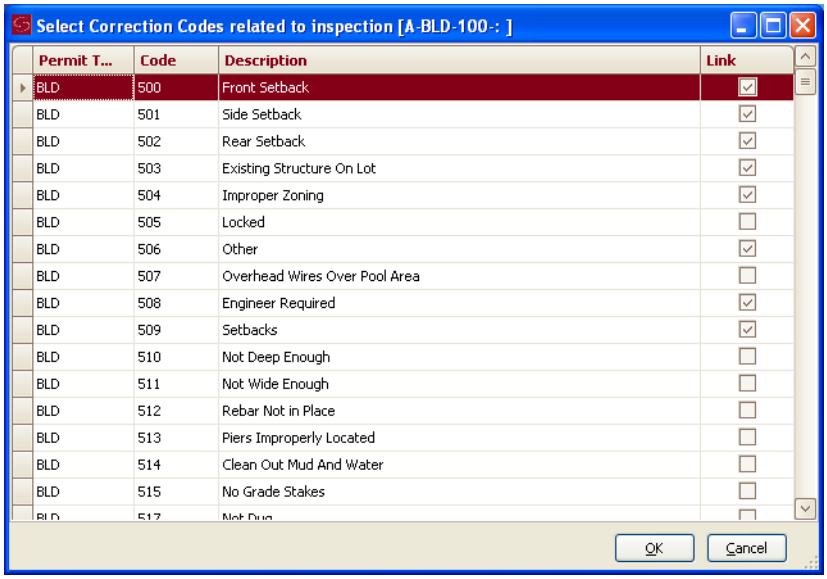


Figure 4-6 Select Correction Codes window

4. Select the check box next to all of the correction codes that you want to associate with the inspection type.
5. Click OK.
   The selected correction codes display in the Corr Codes field.
6. Click OK to return to the Code Manager.

If you have already associated an inspection type with a correction code (see "Associating Inspection Types with a Correction Code" on page 33), the correction code check boxes will already be selected.

Editing Inspection Types

1. Choose Code Manager from the Setup tool set.
2. Select the inspection type that you want to modify and click Edit.
   The Edit Code window opens.
3. Edit the fields that you want to modify and click OK.

Deleting Inspection Types

1. Choose Code Manager from the Setup tool set.
2. Select the inspection type that you want to delete and click Delete.
   The Delete Confirmation dialog box is displayed.
3. Click Yes.
   The inspection type is removed from the Code Manager.

Defining Correction Codes

When inspectors add corrections (or violations) during the inspection process, they choose the correction codes from a pre-defined list. Using the Code Manager you will be able to define correction codes. This code, and its corresponding description, will be attached to the inspection result and stored in your permitting database.

Entering Correction Codes

1. Choose Code Manager from the Setup tool set.
2. Click Add.
   The Add Code window opens (Figure 4-7).

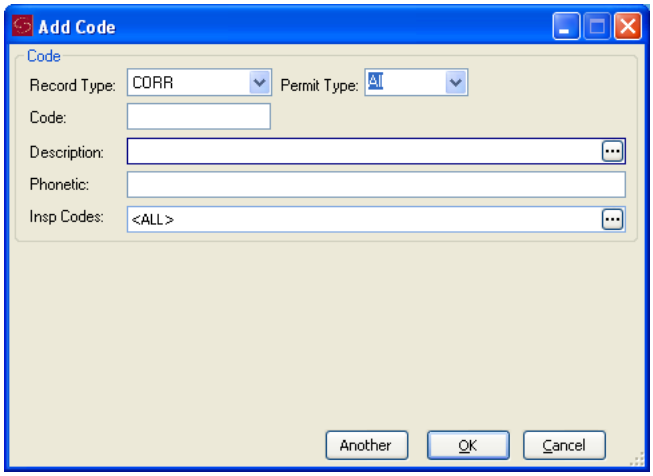


Figure 4-7 Add Code window

3. Select CORR from the Record Type drop-down list.
4. Enter a specific permit type, that this correction code applies to, in the Permit Type field. If the result applies to all types, type ALL.

A permit type must be entered in order for the code to be added to the Code Manager. As stated above, if you are not using a specific permit type for correction results, enter ALL.

5. Enter the correction code in the Code field. This code is unique to your jurisdiction, although the code number is not located in the permitting database.
6. Enter a description in the Description field.

Descriptions entered in the Description field are visible in InspecTrack Notebook Edition and make it easier for inspectors to quickly choose a correction code.

7. Click OK.
   The correction code is displayed in the Code Manager.

To enter additional correction codes, click Another instead of clicking OK. This leaves the Add Code window open and the correct Record Type selected. When finished adding codes, click OK to close the Add Code window.

Associating Inspection Types with a Correction Code

While you are adding a correction code, you can choose to associate specific inspection types with it. When inspectors add a correction to the inspection type in the field, only the specified correction codes will be available.

1. Follow steps 1-7 in "Entering Correction Codes" on page 32.
2. If you want to associate all inspection types with the correction code, leave ALL selected in the Insp Codes field. Otherwise, continue to step 3 below.
3. Select the Insp Codes browse button (…).
   The Select Inspection Codes window displays (Figure 4-8).

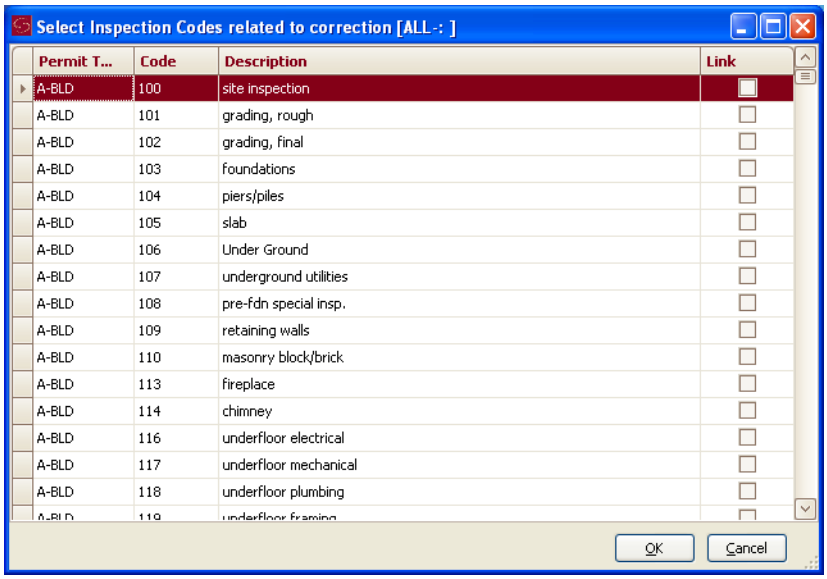


Figure 4-8 Select Inspection Codes window

4. Select the check box next to all of the inspection types that you want to associate with the correction code.
5. Click OK.
   The selected inspection types display in the Insp Codes field.
6. Click OK to return to the Code Manager.

If you've already associated correction codes with an inspection type (see "Associating Correction Codes with an Inspection Type" on page 31), you will see the inspection type check boxes already selected.

Editing Correction Codes

1. Choose Code Manager from the Setup tool set.
2. Select the correction code that you want to modify and click Edit.
   The Code Editor opens.
3. Edit the field that you want to change and click OK.

Deleting Correction Codes

1. Choose Code Manager from the Setup tool set.
2. Select the correction code that you want to delete and click Delete.
   The Delete Confirmation dialog box opens.
3. Click Yes.
   The correction code is removed from the Code Manager.

If your jurisdiction has purchased Code Book Details functionality, additional options are available on the Add Code and Edit Code windows. For a full description of this functionality, see "Code Book Details" on page 83.

Defining Location Choices

When inspectors cite corrections, or violations, they have the option of selecting a pre-defined location. The location usually pertains to a room in a house or a building, and can be helpful when marking corrections. The InspecTrack administrator is responsible for defining a list of primary locations and location descriptions.

Entering Locations

1. Choose Code Manager from the Setup tool set.
2. Click Add.
   The Add Code window displays.

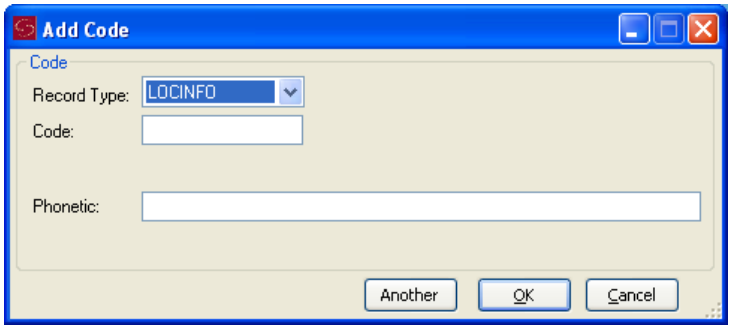


Figure 4-9 Add Code window

3. Select LOCINFO from the Record Type drop-down list.
4. Enter the location in the Code field. This is frequently a room of a house, although the content is unique to your jurisdiction.
5. Click OK.
   The Location code is displayed in the Code Manager.

To enter additional location codes, click Another instead of clicking OK. This leaves the Add Code window open and the correct Record Type selected. When finished adding codes, click OK to close the Add Code window.

Editing Locations

1. Choose Code Manager from the Setup tool set.
2. Select the location that you want to modify and click Edit.
   The Edit Code window opens.
3. Edit the fields that you want to change and click OK.

Deleting Locations

1. Choose Code Manager from the Setup tool set.
2. Select the location that you want to delete and click Delete.
   The Delete Confirmation dialog box is displayed.
3. Click Yes.
   The location is removed from the Code Manager.

Defining Location Types

When inspectors cite locations, they also have the option of noting the location type. Location types are frequently a location (e.g., North, NW, SE), but the exact content is unique to your jurisdiction.

Entering Location Types

1. Choose Code Manager from the Setup tool set.
2. Click Add.
   The Code Editor opens.
3. Select LOC from the Record Type drop-down list.
4. Enter the location type in the Code field.
5. Click OK.
   The location type is displayed in the Code Manager.

To enter additional location types, click Another instead of clicking OK. This leaves the Add Code window open and the correct Record Type selected. When finished adding codes, click OK to close the Add Code window.

Editing Location Types

1. Choose Code Manager from the Setup tool set.
2. Select the location type that you want to modify and click Edit.
   The Edit Code window opens.
3. Edit the fields that you want to modify and click OK.

Deleting Location Types

1. Choose Code Manager from the Setup tool set.

2. Select the location type that you want to delete and click Delete.
   The Delete Confirmation dialog box opens.
3. Click Yes.
   The location type is removed from the Code Manager.

Viewing and Printing Codes

After defining and entering information into the Code Manager, you may want to view the codes in an easy-to-read format. The Code Manager allows you to print a list of codes, which is divided by code type.

1. Choose Code Manager from the Setup tool set.
2. Click Print.
   The Code Report Criteria window opens (Figure 4-10).

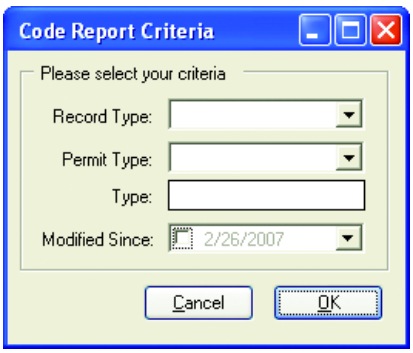


Figure 4-10 Report Filtering window

3. Select a Record Type from the drop-down list.

If you want to see all Record Types, leave the field blank.

4. Select a Permit Type from the drop-down list. To search for all permit types, select ALL.
5. (Optional) Enter a value in the Type field. This only applies to Accela Tidemark Advantage users.
6. (Optional) Select a date from the Modified Since field if you want to set a date range for the report.
7. Click OK to generate the report listing.
   The Codes Report window displays (Figure 4-11 on page 38).

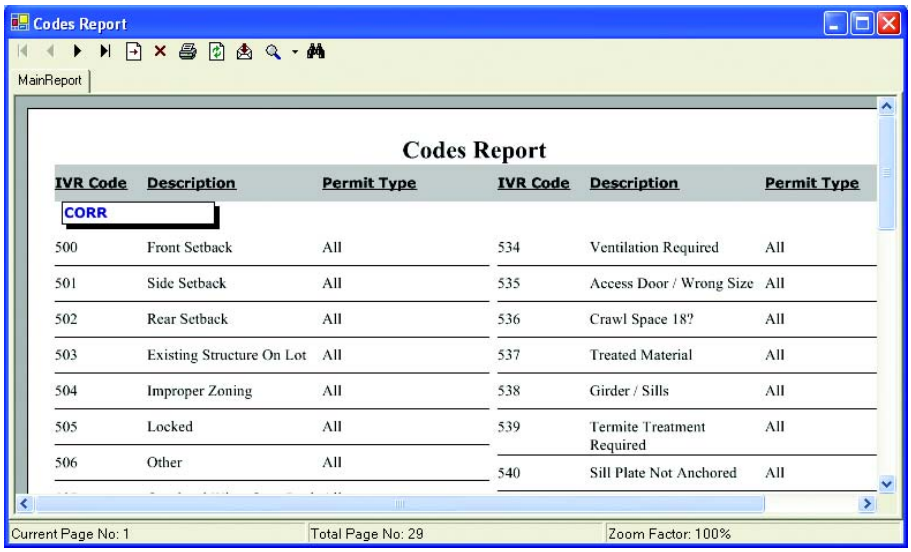


Figure 4-11 Codes Report window

8. Use the Codes Report navigation bar to view or print the report. Refer to "Report Preview Guide" on page 69 for more information on using the navigation bar.

Verifying the Sync Process

CHAPTER 5

After inspectors synchronize the field application with the InspecTrack server, inspection results are transferred from the InspecTrack server to your permitting database. The synchronization process usually works smoothly, but occasionally there are exceptions such as a conflict related to scheduling or posting results. For example, your jurisdiction may require that if fees are owed on a permit, a passing result cannot be issued. In this instance, when an inspector marks a passing result on a permit with fees, the permitting database will not let InspecTrack post the result and an exception will be generated on the Exceptions panel.

When the Code Enforcement module has been implemented, inspectors can generate new permits in the field[1]. Exceptions generated for new permits are tracked on the Field Permits panel.

As the InspecTrack supervisor, you should check the Exceptions panel and Field Permits panel (if applicable) on a daily basis so conflicts can be corrected either in your inspection workflow or in your permitting database.

Monitoring Exceptions

Any conflicts in scheduling or posting results will appear on the Exceptions panel. It's extremely important for you to closely monitor the Exceptions panel since inspectors are not notified of conflicts or errors when synchronizing. Close monitoring allows you to verify that your permitting database contains accurate information.

The Exceptions panel's default view displays all unresolved exceptions in a table format. Information contained in the table includes the date and time of the exception, the permit number, and the description of the exception. An example of the Exceptions panel can be seen in Figure 5-1.

1. Code Enforcement is an optional, add-on module for InspecTrack and may not be available with your system. If you are interested is this functionality, speak to your Selectron Technologies representative.

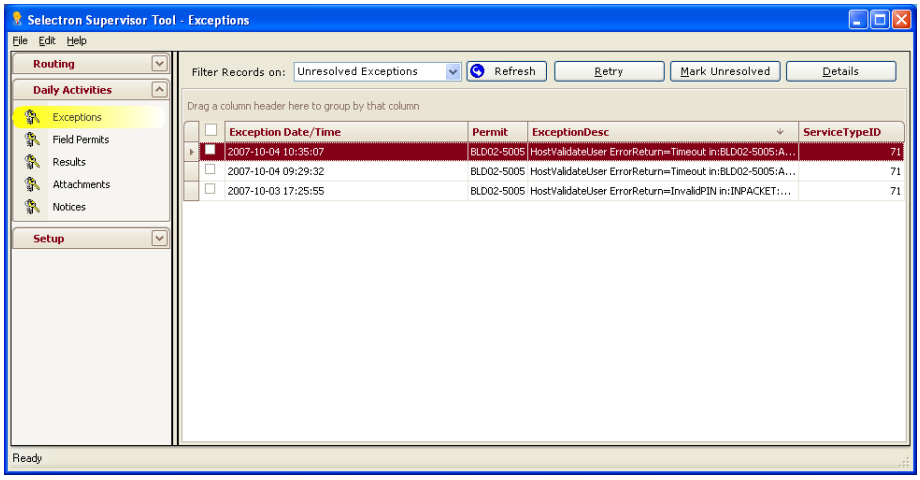


Figure 5-1 Exceptions panel

Unresolved exceptions are items that you have not attended to or are not 'resolved.' Generally, you will want to resolve exceptions, but your methods may differ depending on the type of exception. If the exception indicates that data was not uploaded to the permitting database you may want to resolve a work flow issue and try to resend the exception's information. If the information is successfully transmitted, the exception is automatically resolved.

Viewing an Exception

1. Choose Exceptions from the Daily Activities tool set.
   The Exceptions panel appears. By default, unresolved exceptions are displayed.
2. Select an exception and click the Details button.
   The Exception Details window opens (Figure 5-2 on page 40).

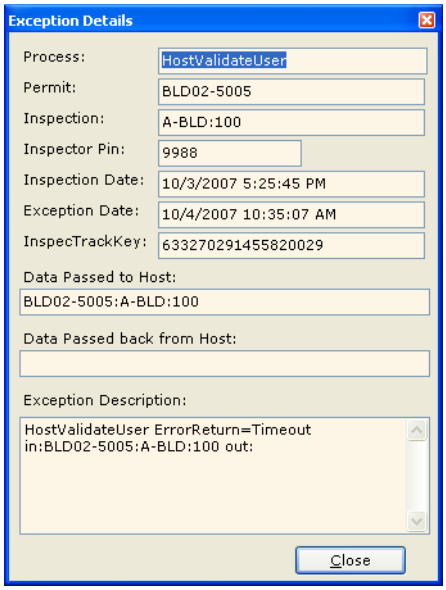


Figure 5-2 Exception Details window

Check the Exception Description field for information about why the exception was generated. In the instance above, a connection to the permitting system could not be established, resulting in an exception being generated.

3. Click the Close button.

Resolving an Exception

After reviewing an exception, it may be necessary to update the permitting database, particularly if there is a scheduling conflict. Please review the documentation for your permitting database for assistance on making these changes to your database. Once you have adjusted any conflicts you can try again to send the exceptions on to the permitting system.

1. Select Exceptions from the Daily Activities tool set.
2. Select the check box for each exception that you would like to re-send.

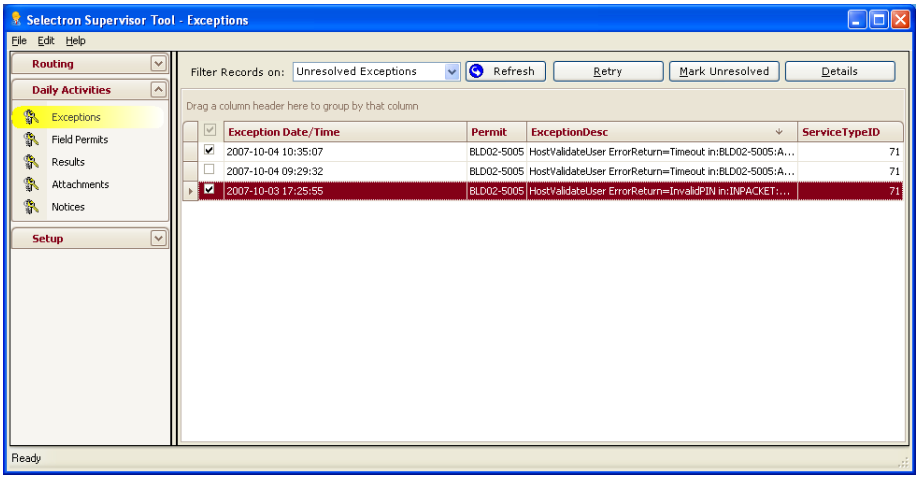


Figure 5-3 Unresolved Exceptions with selected check boxes

To mark all exceptions to be resent, select the check box in the column header.

3. Click Retry.
   The system will attempt to process the exceptions again.
4. Click Refresh.
   If an exception was successfully sent, it will be removed from the unresolved exceptions and placed with the previously resolved exceptions. If an exception was

not successfully sent, the ExceptionDesc field will be updated with a new description.

5. If the exception cannot be resent, but you want to remove it from the unresolved view, select the exceptions check box and click Mark Resolved.
   The exception is moved onto the Resolved Exceptions screen.

6. To view resolved exceptions, select Resolved Exceptions from the Filter Records on drop down list.
   The list of resolved exceptions appears.

Adding Permits Created in the Field

When your jurisdiction has implemented the Code Enforcement module[1] for InspecTrack, inspectors can create permits in the field. These permits are typically created when inspectors come across a code violation that requires that a correction be recorded for the site. InspecTrack is unable to create new permits in your permitting system, so these newly created permits appear in the Supervisor Tool.

As the administrator of the Supervisor Tool, it is your responsibility to create a new permit in the permitting database and associate it with the field-generated permit.

Adding Field Permits

1. Run a code enforcement report.
   Refer to "Printing a Code Enforcement Report" on page 43 for additional assistance with adding permits to the permitting database.

2. Create a new permit in the permitting database.

When adding a permit to the permitting database it is unnecessary to add inspection information collected by the inspector. This information will be added automatically. You will have to add all permit information, however. This includes the address information (Street number, street address, etc.).

3. Choose Field Permits from the Daily Activities tool set.

4. Select Unresolved Permits from the Filter Records on drop-down list.

5. Select a permit and click Details.
   The Permit Exception Details window appears with the inspector-entered information displayed (Figure 5-4).

1. Code Enforcement is an optional, add-on module for the InspecTrack system. This functionality will not be available if your jurisdiction has not purchased the module.

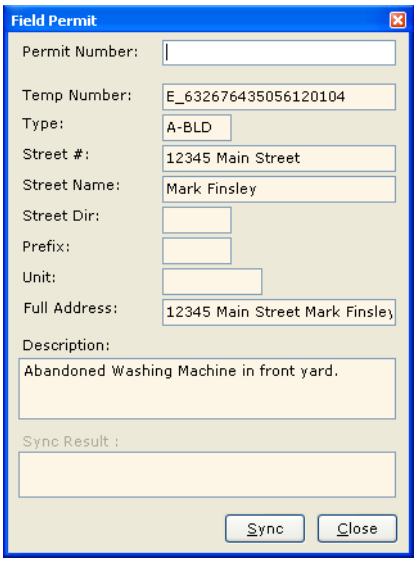


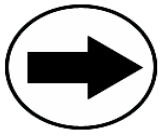
Figure 5-4 Permit Exception Details window

6. In the Permit Number field, enter the permit number that was generated by the permitting database.
7. Click Sync.
   The result of the sync displays in the Sync Result field.
8. Click Close.
   The exception should be removed from the screen.

Printing a Code Enforcement Report

When creating a permit in the permitting database, it is a good idea to write down the permit number so that you have an easy reference when updating the Field Permits panel. The Code Enforcement report creates a user-friendly list of exceptions, with an area to record permit numbers generated by the permitting database.

1. Choose Field Permits from the Daily Activities tool set.
2. Select the check box for all permit exceptions that you wish to upload to the permitting database.



To mark all exceptions to be resent, select the check box in the column header.

3. Click Print.
   The Report Preview window appears, displaying all permit exceptions (Figure 5-5). For more information on using the Report Preview options, refer to Appendix A, Report Preview Guide.

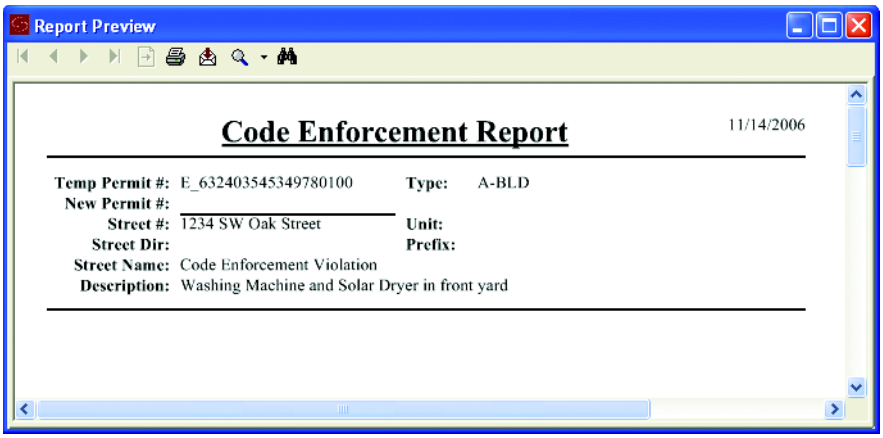


Figure 5-5 Code Enforcement Report

4. Create a permit in the permitting database for each exception and record the permit number in the New Permit# section of the report.
5. Follow the instructions in "Adding Field Permits" on page 42 to add permits to the permitting database.

Monitoring Permit Activity

CHAPTER 6

Once inspectors are done performing their final syncs for the day, you can monitor all permit activity that occurred. 'Permit activity' includes all inspection results, corrections, and notices that were attached to permits by inspectors in the field. The Results panel allows you to view permit activity for a specific date range or by permit number.

Filtering for Activity

Prior to viewing inspection activity, you will need to run a permit filter. You can choose to filter by date range, or by a specific permit number. The filter returns all permit activity that matches the search criteria and displays the activity date, permit number, inspector, the number of failed inspections associated with the permit, the number of passed inspections, and the number of notices attached.

Filter by Date Range

When filtering by date range, all activity for all permits meeting the search criteria will be displayed.

1. Choose Results from the Daily Activities tool set.
   The Results panel displays (Figure 6-1 on page 47).

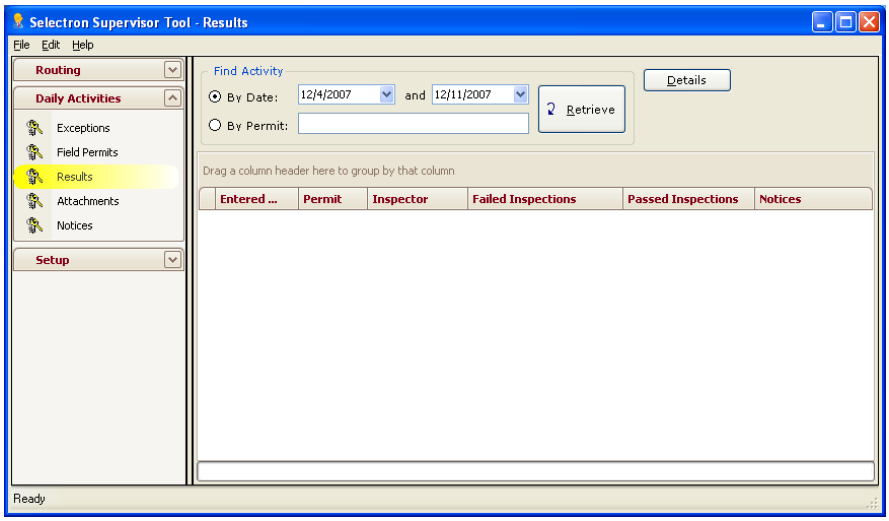


Figure 6-1 Results panel

2. Select the By Date radio button.
3. Select the start and end date from the drop-down calendars.

4. Click Retrieve.
   Permit activity that matches the search criteria will appear in the permit filter table.

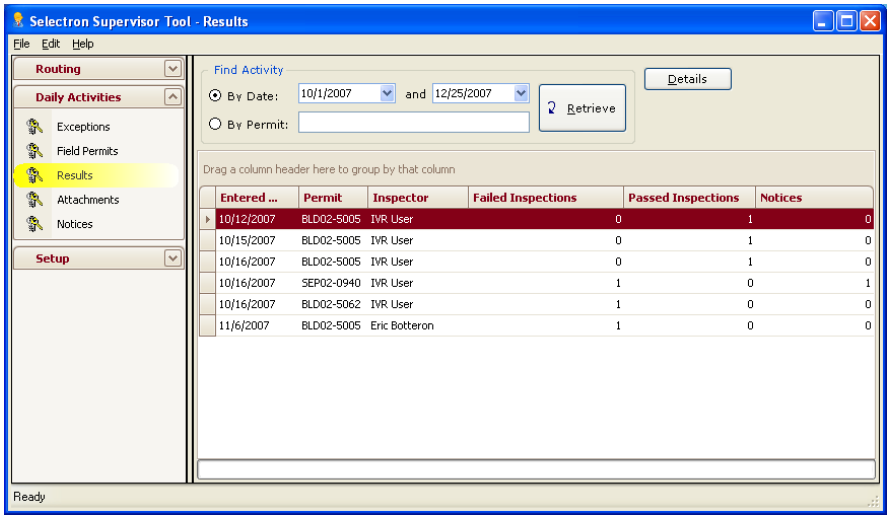


Figure 6-2 Results panel with activity displayed in the permit filter table

Filter by Permit Number

When filtering by permit number, only activity for the specific permit displays.

1. Choose Results from the Daily Activities tool set.
2. Select the By Permit radio button.
3. Enter the permit number in the text field.
4. Click Retrieve.
   All activity matching the search criteria displays.

Viewing Permit Activity

Once you have performed a filter, you can view the details associated with each activity item on the permit filter table. When viewing details, you will see all applicable information regarding results, corrections, and notices. Table 6-1: shows the data displayed for each activity type.

Table 6-1: Displayed Activity Details

Activity Type	Displayed Data
Results	• Inspection type • Inspection results • Inspector's results notes (if available) • Reinspection date (if applicable) • Result date • Result ID (unique identifier for the activity)
Corrections	• Inspection type • Inspection results • Inspector's correction notes (if available) • Correction code • Correction description • Creation date • Code book reference[a] • Result ID (unique identifier for the activity)
Notices	• Creation date • Notice description (e.g., correction or inspection)

a. Only applicable if the Code Book Details add-on module has been purchased.

Viewing Permit Activity Details

1. Choose Results from the Daily Activities tool set.
2. Perform a permit filter, if necessary (see "Filtering for Activity" on page 47).
3. Select the correct activity and click Details.
   The Uploaded Result Session Detail window displays (Figure 6-3).

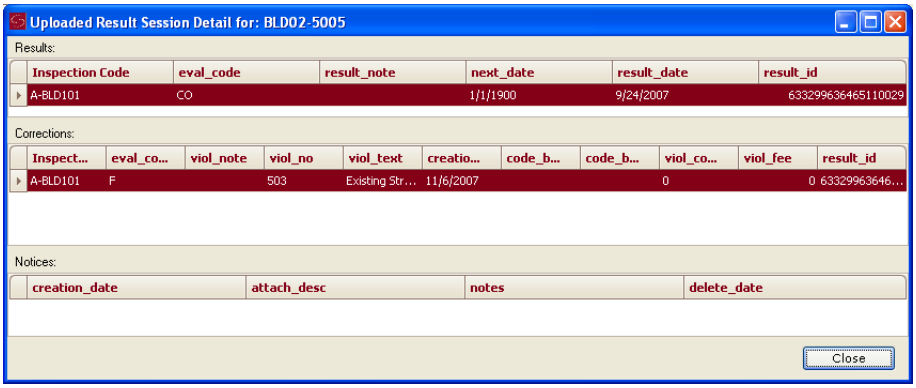


Figure 6-3 Uploaded Result Session Detail window

To view the Uploaded Results Session Detail window, you can also double-click the activity in the permit activity table

Managing Notices

CHAPTER 7

Once inspectors have performed their daily syncs, any notices that have been created will be available for viewing in the Supervisor Tool. Using the Notices panel, you can view notices, print notices, view the print history for a specific notice, as well as delete notices. This chapter describes how to use the Supervisor Tool to manage these notices.

Filtering for Notices

Prior to viewing notices, you will need to run a filter. You can choose to filter by date range, or by a specific permit number. The filter returns all notices that match the search criteria and displays the permit number, notice description, creation date, last print date, and the print location that was specified in the field.

Filter by Date Range

1. Choose Notices from the Daily Activities tool set.
   The Notices panel displays (Figure 7-1).

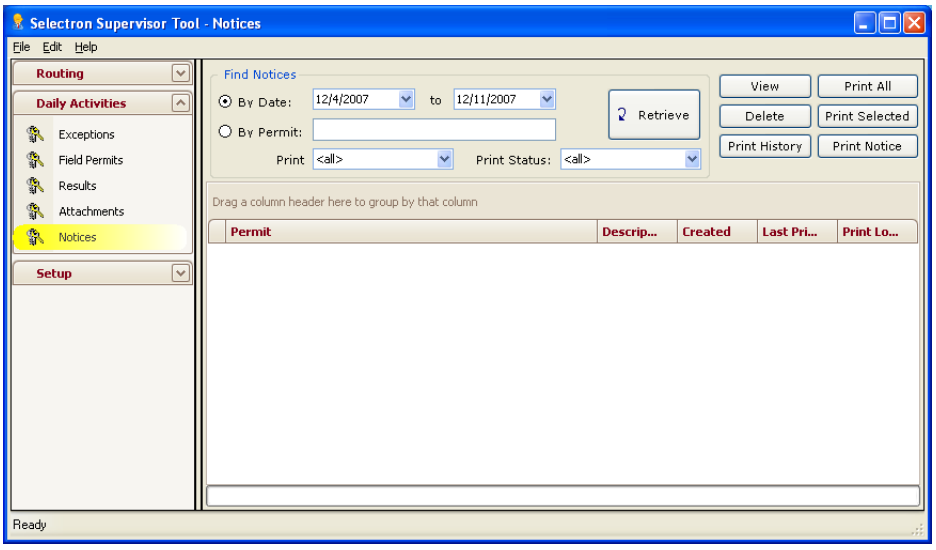


Figure 7-1 Notices panel

2. Select the By Date radio button.
3. Select the start and end date from the drop-down calendars.
4. Select a print location from the Print Location drop-down list.

The Print Location indicates whether or not a notice has been printed and given to the contractor or permit holder. When inspectors print a notice in the field, they should set the print location status to Field. When you see the 'field' status in the Supervisor Tool, you can assume that the notice was given to the permit holder. Optionally, if inspectors don't print the notice, the status should be set to Office, alerting you to the fact that the notice was not provided to the permit holder. Additionally, if your business rules require it, the inspector can set a status of Field and Office.

5. Select a print status from the Print Status drop-down list.
6. Click Retrieve.
   Notices that match the search criteria will appear in the permit filter table (Figure 7-2 on page 52).

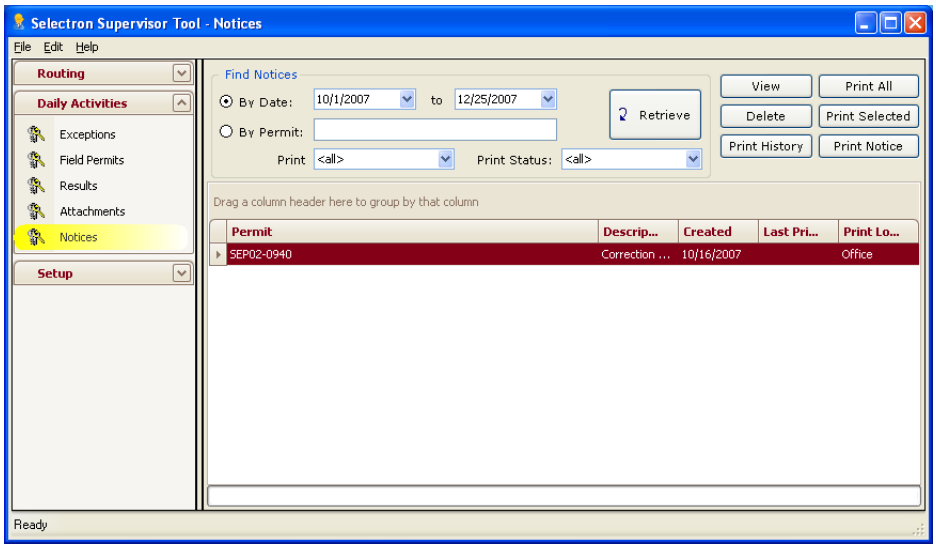


Figure 7-2 Filtered notice

Filter by Permit Number

When filtering by permit number, only notices for the specific permit display.

1. Choose Notices from the Daily Activities tool set.
2. Select the By Permit radio button.
3. Enter the permit number in the text field.

4. Select a print location from the Print Location drop-down list.
5. Select a print status from the Print Status drop-down list.
6. Click Retrieve.
   All notices matching the search criteria display.

Managing Notices

Once you have performed a filter, you can view all permit activity associated with a notice from the Notices panel. Information displayed on this panel includes the permit number, notice description, the date that the notice was created in Notebook Edition, the last printing date of the notice, and the print location specified by the inspector. The filter criteria used is displayed at the top of the tab. Figure 7-2 on page 52 shows an example of the Notices panel with a successful search.

Viewing Notices

1. Choose Notices from the Daily Activities tool set.
2. Perform a permit filter, if necessary (see "Filtering for Notices" on page 51).
3. Select the correct notice from the table and click View.
   The Report Preview window appears, displaying the notice (Figure 7-3).

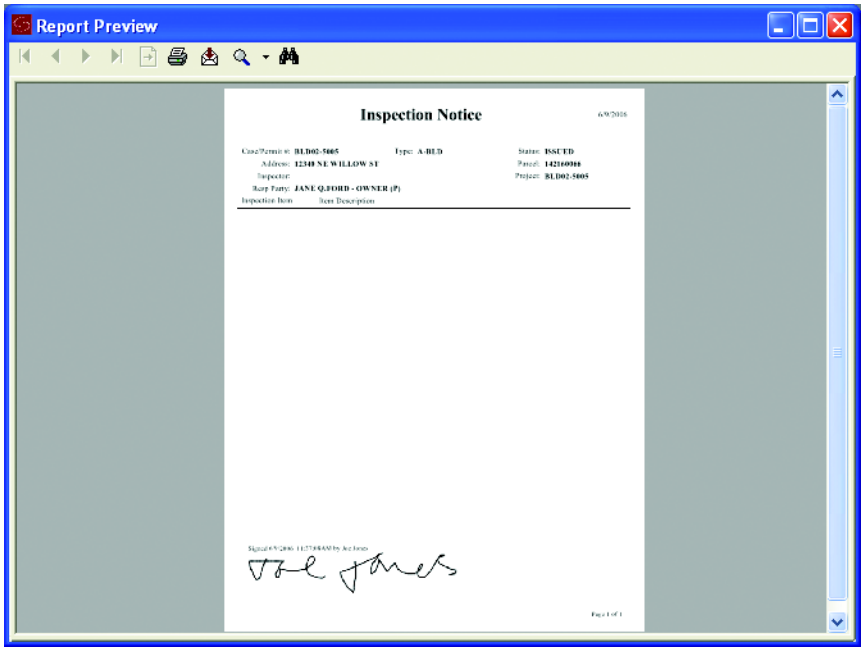
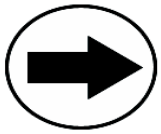


Figure 7-3 Report Preview window displaying a notice



To view a notice, you can also double-click the notice in the Notices table.

4. Use the Report Preview navigation bar to adjust the view or print the notice. See "Report Preview Guide" on page 69 for more details on the use of the navigation bar.

Printing Notices

1. Choose Notices from the Daily Activities tool set.
2. Perform a permit filter, if necessary (see "Filtering for Notices" on page 51).
3. Select the correct notice from the table and click Print Notice.
   The notice will be sent to your default printer.

To print more than one notice at a time, select all applicable notices in the table and click Print Selected. To select multiple notices, Control-click each notice that you want to print. To print all notices at once, click the Print All button. All notices will be sent to your default printer.

Right-click on a notice to open the shortcut menu (Figure 7-4). You can choose to print the notice (or notices) from this menu. In addition to printing, you can quickly access the print history, select or deselect all notices, toggle the selection, and view the notice.

Figure 7-4 Shortcut menu

Viewing Print History

The Supervisor Tool keeps a record of the number of times a notice is printed. When viewing the print history, the Supervisor Tool displays the date(s) the notice was printed on, who printed the notice, printer used, and the computer that the notice was printed from.

1. Choose Notices from the Reporting tool set.
2. Perform a permit filter, if necessary (see "Filtering for Notices" on page 51).

3. Select the correct notice from the table and click Notice Print History. The Notice Printing History window displays (Figure 7-5).

Figure 7-5 Notice Print History window

Double-click a print history listing to access the Report Preview window for the notice.

Managing Digital Attachments 8

CHAPTER

When either the Digital Photos or Digital Sketches modules are implemented, inspectors are able to connect digital attachments to permits, much like attaching a file to an e-mail. Once an inspector performs a synchronization, all digital attachments are available in the Supervisor Tool. Using the Attachments panel you can choose to view or delete the attachment.

Filtering for Attachments

Prior to viewing attachments, you will need to run a permit filter. You can choose to filter by date range, or by a specific permit number. The filter returns all attachments that match the search criteria and displays the permit number, inspector, attachment type description, created date (which may not be the date the attachment was connected to the permit), file name, and file size.

Filter by Date Range

When filtering by date range, all attachments for all permits meeting the search criteria will be displayed.

1. Choose Attachments from the Daily Activities tool set.
   The Attachments panel displays (Figure 8-1 on page 57).

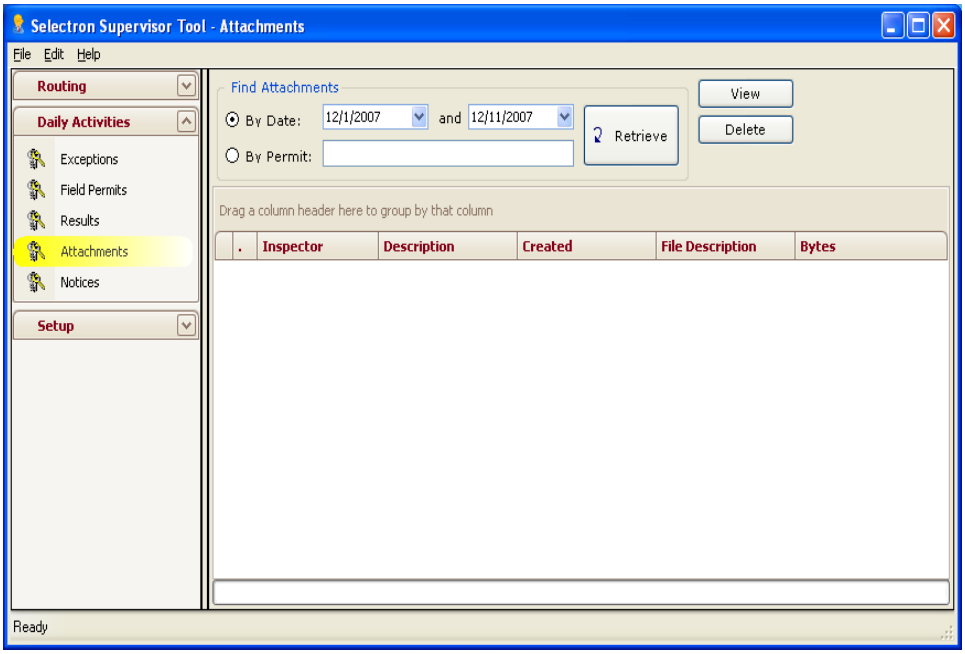


Figure 8-1 Attachments panel

2. Select the By Date radio button.
3. Select the start and end date from the drop-down calendars.
4. Click Retrieve.
   Attachments that match the search criteria will appear in the permit filter table (Figure 8-2).

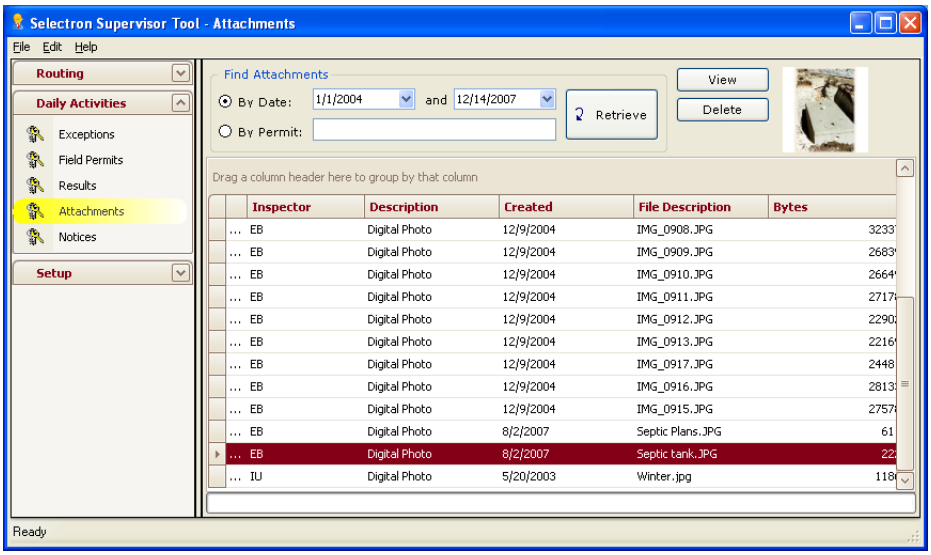


Figure 8-2 Attachment panel with filtered attachments

Filter by Permit Number

When filtering by permit number, only activity for the specific permit displays.

1. Choose Attachments from the Daily Activities tool set.
2. Select the By Permit radio button.
3. Enter the permit number in the text field.
4. Click Retrieve.
   All attachments matching the search criteria display.

Managing Attachments

Once you have performed a filter, you can view all details associated with an attachment from the Attachments panel. Information displayed on this panel includes the permit number, inspector, attachment type, attachment creation date (not the same as the attached date), file name, and file size. Figure 8-2 on page 58 shows an example of the Attachments panel with a successful search.

Viewing an Attachment

1. Choose Attachments from the Daily Activities tool set.
2. Perform a permit filter, if necessary (see "Filtering for Attachments" on page 57).
3. Select the correct attachment from the table.
   A thumbnail appears at the top right of the screen (Figure 8-3).

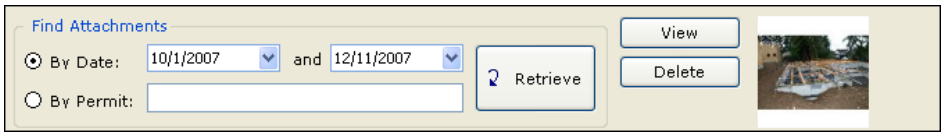


Figure 8-3 Thumbnail of attachment

4. Click View to see the attachment.

Depending on the type of attachment, a different viewer may open. For sketches, your default sketch application will open (e.g., Microsoft® Paint®). For photos, the Windows® Picture and Fax viewer will open.

To view an attachment, you can also double-click the attachment in the Attachments table.

Deleting an Attachment

1. Choose Attachments from the Daily Activities tool set.
2. Perform a permit filter, if necessary (see "Filtering for Attachments" on page 57).
3. Select the correct attachment from the table and click Delete.
   The Confirm dialog box appears.
4. Click Yes.
   The attachment is removed from the Attachments table and from the InspecTrack database.

Attachments are stored on the InspecTrack server and are not available in the permitting database. If you delete the attachment from the Supervisor Tool, you will not have it available in the future.

Creating System Reports

9

CHAPTER

To track the number of uploads inspectors perform, as well as other system-use indicators, you can generate web-based reports. A variety of reports are available to document system use and activity.

Table 9-1: describes the reports that are available with a standard InspecTrack installation.

Table 9-1: InspecTrack Standard Reports

Type	Report	Definition
System	System Usage	Inspector uploads for selected date range
System	System Usage by Hour	Inspector uploads by hour for selected date range
System	Call Activity Details	Detail of each inspector action associated with a permit.
Application	Action Report	A report of the type of actions made for a selected date range
Application	Inspector Post Activity Report	A list of the number of inspections posted, by inspector name, for a selected range.

Creating a Report

Reports are run using the Reporting module included with the InspecTrack system.

1. Open a web browser and go to http://*YourInspecTrackServer*/STIReports/login.aspx. Replace "*YourInspecTrackServer*" with the name or IP address of the InspecTrack server.
   The report login screen is displayed (Figure 9-1).

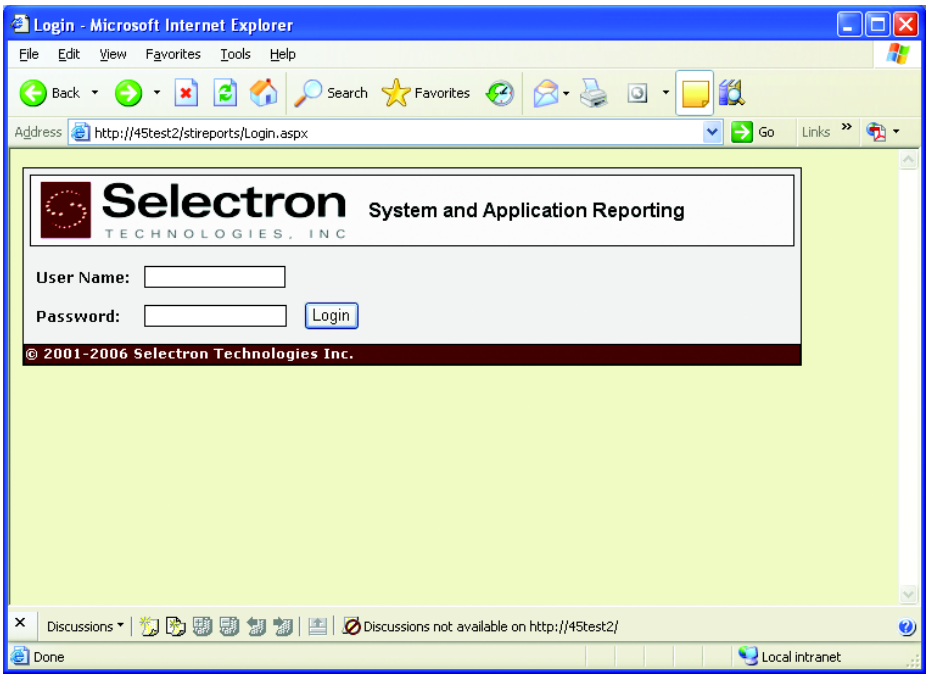


Figure 9-1 Report login screen

Note that if you are accessing web reports from the InspecTrack server, you may use: http://localhost/STIReports/login.aspx

2. Enter your user name and password, and click Login.
   You will now see the SelectReport screen (Figure 9-2 on page 63).

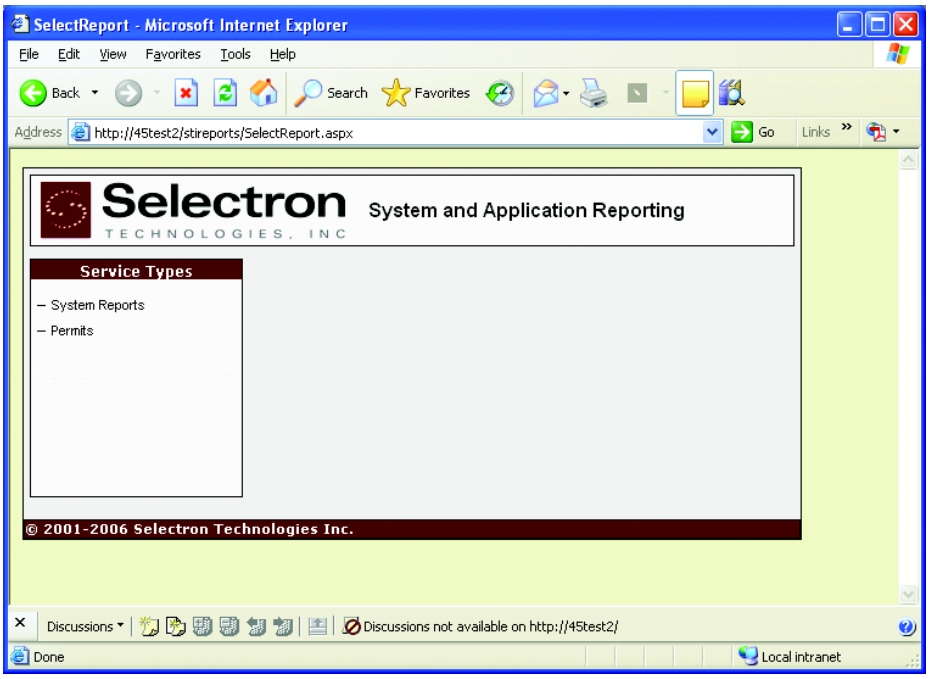


Figure 9-2 SelectReport screen

Your login name and password for the Reporting module should be set up by the InspecTrack administrator. For instructions on creating access to the Reporting module (and the Administration Tool) refer to the InspecTrack Administrator's Guide.

3. Select **System Reports** from the Service Types menu to expand reporting options (Figure 9-3).

Figure 9-3 Service Type menu with expanded reporting options.

Mouse over the report name to see a brief description and example of the report.

4. Select the appropriate report from the expanded list.
   The date range screen is displayed (Figure 9-4).

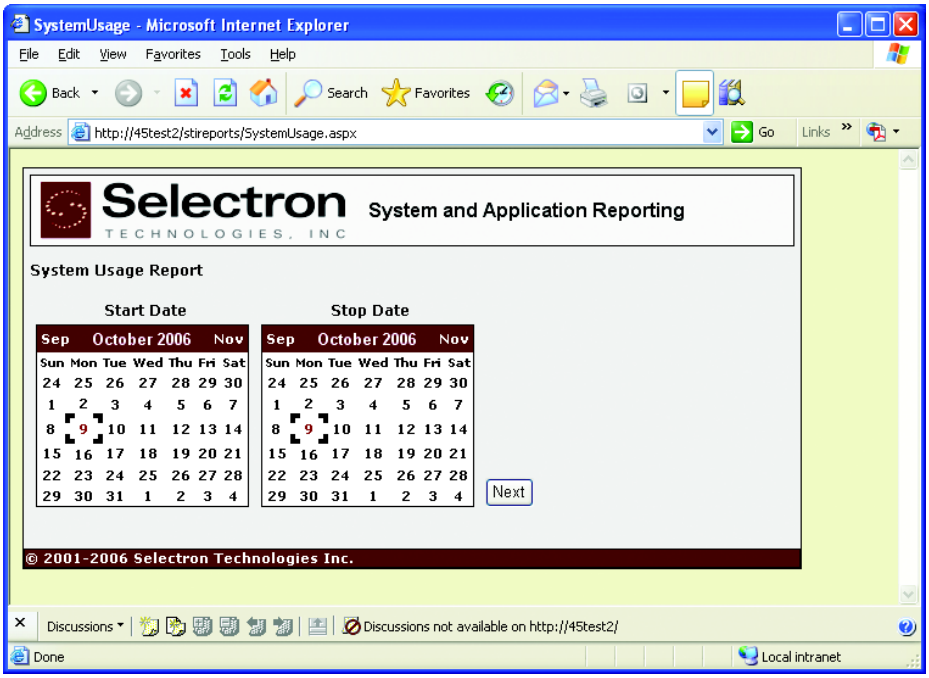


Figure 9-4 Date Range screen

5. Select the report date range using the start and stop calendars, then click Next. If a date range is not selected, the report will default to the current date.
   The report is generated.

6. To print, click on the print icon (). The report will open as a print-friendly PDF file.

Note that Adobe® Reader® must be installed in order for the report to open in this format. To get the latest version of Adobe Reader, use the following link: www.adobe.com

System Reports

System reports monitor the amount of activity your system is receiving from inspectors in the field. This section will briefly review each system report.

System Usage

The System Usage report provides the number of uploads that inspectors performed by a specific date range. Figure 9-5 displays an example of this report.

System Usage

Machine: nt87 — 4/10/2006 To 4/21/2006

Application	Sun	Mon	Tues	Wed	Thurs	Fri	Sat	Total
MOBILE								
Permits	12	76	54	35	91	13	12	293
Totals:	**12**	**76**	**54**	**35**	**91**	**13**	**12**	**293**

Figure 9-5 System Usage report

System Usage by Hour

The System Usage by Hour report provides the number of uploads performed by inspectors, per hour. This report can be generated for a specific date range. Figure 9-6 shows an example of this report.

System Usage by Hour

4/10/2006 To 4/21/2006

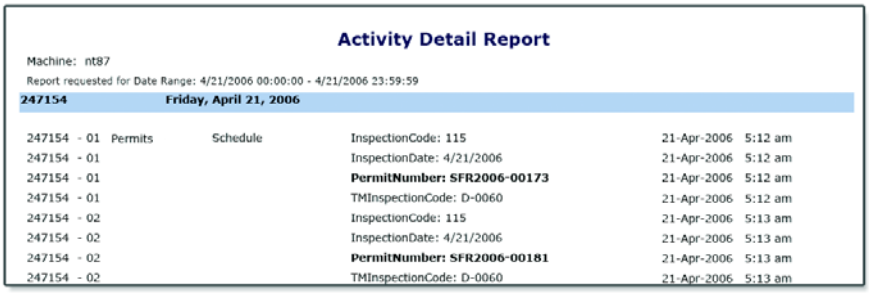
Machine: nt87

Mobile	Hour Of Day	Sun	Mon	Tue	Wed	Thurs	Fri	Sat	Total
Permits	01:00	0	0	0	1	0	0	0	**1**
	02:00	0	0	0	0	1	0	0	**1**
	03:00	0	1	0	0	0	0	0	**1**
	04:00	0	9	2	2	1	2	1	**17**
	05:00	0	2	2	0	2	0	0	**6**
	06:00	0	3	6	4	7	5	0	**25**
	07:00	0	9	9	3	1	8	0	**30**
	08:00	0	8	7	6	1	7	0	**29**
	09:00	1	9	2	1	6	0	0	**19**
	10:00	0	4	5	6	0	7	1	**23**
	11:00	1	9	8	9	8	7	0	**42**
	12:00	0	3	8	0	1	9	3	**24**
	13:00	1	9	4	4	9	0	2	**29**
	14:00	2	9	7	4	8	3	0	**33**
	15:00	0	8	5	2	8	2	0	**25**
	16:00	0	2	0	1	4	3	0	**10**
	17:00	0	2	6	1	0	6	2	**17**
	18:00	0	1	4	7	0	4	0	**16**
	19:00	2	2	3	8	5	0	0	**20**
	20:00	1	7	3	0	3	0	2	**16**
	21:00	1	6	7	2	7	0	0	**23**
	22:00	2	0	9	1	1	0	1	**14**
	23:00	1	3	5	2	5	0	0	**16**
	24:00	0	0	2	1	3	0	0	**6**
Totals:		**12**	**106**	**104**	**65**	**81**	**63**	**12**	**443**

Figure 9-6 System Usage by Hour report

Activity Detail Report

The Activity Detail report displays all actions taken by the inspector. Figure 9-7 shows an example of this report.



Activity Detail Report

Machine: nt87

Report requested for Date Range: 4/21/2006 00:00:00 - 4/21/2006 23:59:59

247154 **Friday, April 21, 2006**

247154 - 01	Permits	Schedule	InspectionCode: 115	21-Apr-2006 5:12 am
247154 - 01			InspectionDate: 4/21/2006	21-Apr-2006 5:12 am
247154 - 01			**PermitNumber: SFR2006-00173**	21-Apr-2006 5:12 am
247154 - 01			TMInspectionCode: D-0060	21-Apr-2006 5:12 am
247154 - 02			InspectionCode: 115	21-Apr-2006 5:13 am
247154 - 02			InspectionDate: 4/21/2006	21-Apr-2006 5:13 am
247154 - 02			**PermitNumber: SFR2006-00181**	21-Apr-2006 5:13 am
247154 - 02			TMInspectionCode: D-0060	21-Apr-2006 5:13 am

Figure 9-7 Call Activity Detail report

Action Report

This report details the type of actions that inspectors took during a selected date range. Figure 9-8 shows an example of this report.

Machine: nt87

Application Usage

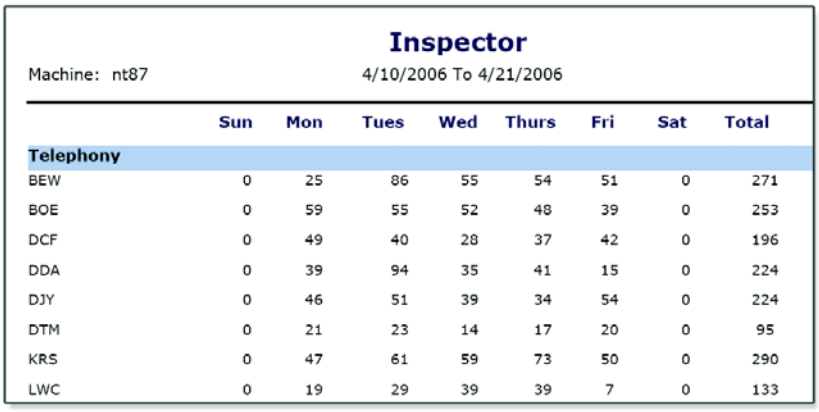
4/10/2006 To 4/21/2006

	Mobile	Telephony	Web	Total
Cancel	0	0	0	0
Hear Messages	0	0	0	0
Operator	0	0	0	0
PlanReview	0	0	0	0
Post	443	0	0	443
Results	0	0	0	0
Schedule	25	0	0	25
Total	**0**	**0**	**0**	**468**

Figure 9-8 Action report

Inspector Activity Report

The Inspector Activity report details the number of inspections posted by each inspector for a specified date range. Figure 9-9 shows an example of this report.



Inspector

Machine: nt87 — 4/10/2006 To 4/21/2006

	Sun	Mon	Tues	Wed	Thurs	Fri	Sat	Total
Telephony								
BEW	0	25	86	55	54	51	0	271
BOE	0	59	55	52	48	39	0	253
DCF	0	49	40	28	37	42	0	196
DDA	0	39	94	35	41	15	0	224
DJY	0	46	51	39	34	54	0	224
DTM	0	21	23	14	17	20	0	95
KRS	0	47	61	59	73	50	0	290
LWC	0	19	29	39	39	7	0	133

Figure 9-9 Inspector Activity report

Report Preview Guide

A

APPENDIX

There are many places in the Supervisor Tool that allow you to print information. When you decide to print, the Report Preview window (or some variation) opens. From this window, you can print, search for specific text, or adjust the view using the Navigation Bar (which is located atop the Report Preview window). Table A-1 displays all available buttons on the Navigation Bar and provides a brief description of each option.

Table A-1 Navigation Bar Buttons

Icon	Description
	Go back to the first page of the report
	Go back one page in the report
	Go forward one page in the report
	Go forward to the last page in the report
	Go to a specified page in the report
	Print the report
	Export report as a PDF
	Increase/decrease size of report view (zoom)
	Search for specific text in the report

Managing Checklists

B

APPENDIX

Checklists function as 'to-do' lists, ensuring that inspectors follow your jurisdiction's established guidelines[1]. Checklists can be configured for specific permit types, all permit types, specific inspection types, all inspection types, or a combination. As a supervisor, you can choose to require that inspectors complete an entire checklist–or just individual items–before completing an inspection.

On the Checklists panel, the Supervisor Tool displays all currently configured checklists. Additional information displayed includes the checklist description, associated permit type(s), sequence number (relative to all other checklists), the number of associated inspection types, the number of items on the list, and whether or not the checklist is active. Figure B-1 shows an example of the Checklists panel with a set of configured checklists.

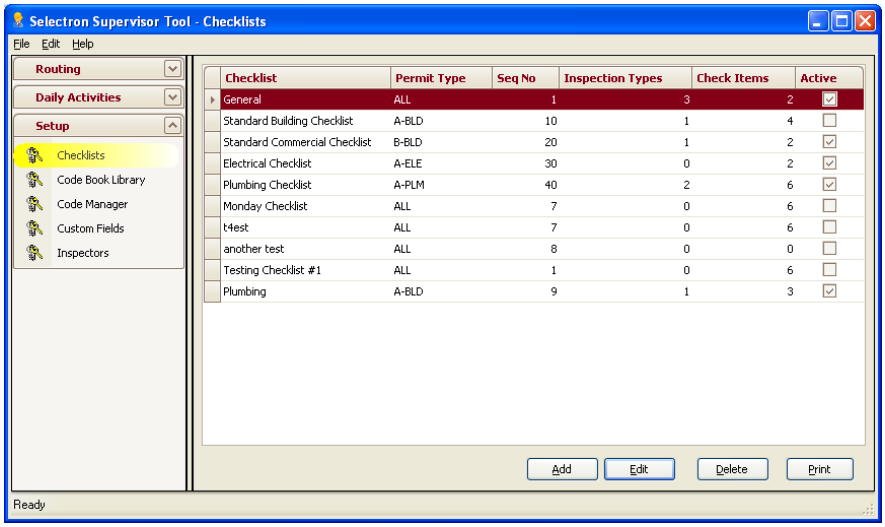


Figure B-1 Checklists panel

1. Checklist functionality is an optional, add-on module for InspecTrack that may not have been implemented for your system. If you are interested in this functionality, speak to your Selectron Technologies Representative.

Creating Checklists

Creating a checklist involves setting up checklist details and adding items to the list. Checklist details include the checklist description, associated permit and inspection types, whether or not the checklist is 'active,' as well as other settings. Checklist items are the steps that need to be completed by the inspector.

Configuring Checklist Details

1. Choose Checklists from the Setup tool set.
   The Checklists panel displays.
2. Click Add.
   The Checklist window displays (Figure B-2).

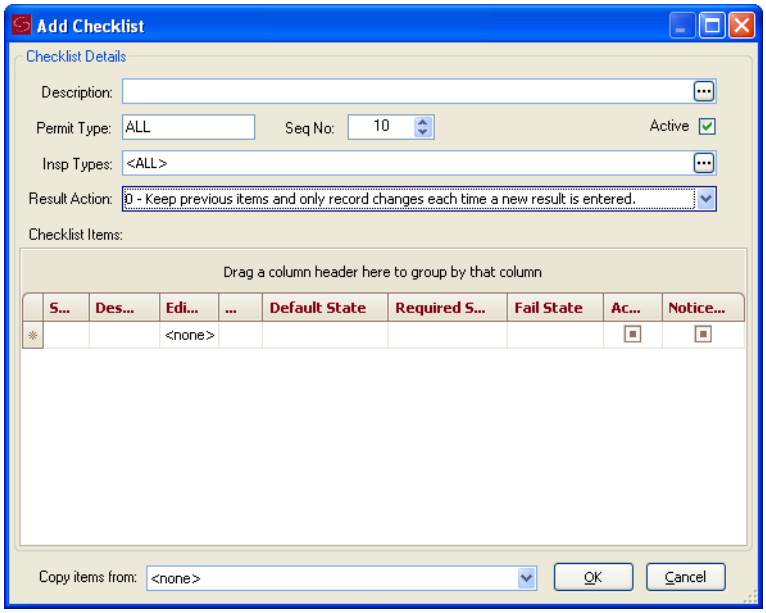


Figure B-2 Checklist window

3. Enter a name for the checklist in the Description field.

Click the Browse button (…) to increase the size of the Description field.

4. In the Permit Type field, enter the permit type that this checklist should apply to. If it applies to all permit types, enter ALL.
5. Select the sequence number for the checklist from the Seq No selection list. If more than one checklist is active (and applicable) this field determines the order in which each checklist will be presented to inspectors.

6. Select the Active check box to make this checklist active and available to inspectors in the field.
7. Select all inspection types to be associated with the checklist using the Insp Types browse button(...). For more information on associating inspection types with a checklist, see "Associating Inspection Types with a Checklist" on page 73.
8. Select a result action from the Result Action drop-down list.

Two options are available in the Result Action field. The "0" option saves the checklist settings that an inspector records. These settings will change only if the next inspector manually adjusts items on the checklist. This option can reduce the number of items that inspectors need to check, especially if another inspector has previously marked checklist items. The "1" option resets all the items in a checklist every time an inspector records a new result for the inspection.

9. Add the checklist items (see "Adding Checklist Items" on page 74) and click OK. The checklist displays in the Checklists panel.

Associating Inspection Types with a Checklist

When creating checklists you can associate a checklist with a specific inspection type (or types). Complete steps 1-6 in "Configuring Checklist Details" on page 72 prior to performing the following steps.

1. Select the Insp Types browse button (...).
   The Select Inspection Types window appears.

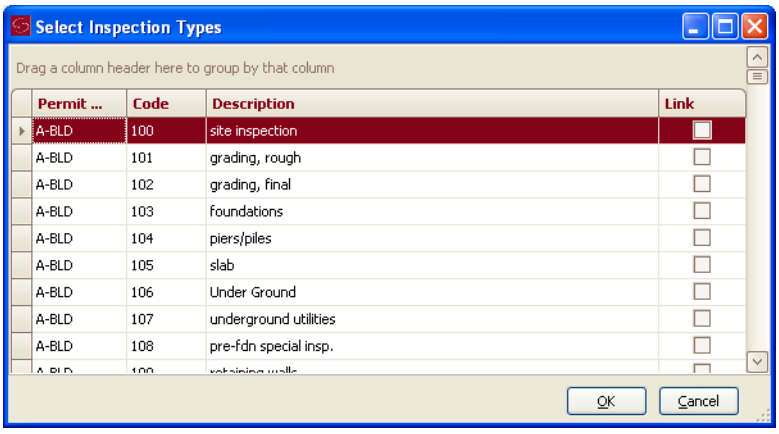


Figure B-3 Select Inspection Types window

2. Select the check box for each inspection type that should be associated with the checklist.

If the checklist applies to all inspection types, leave 'ALL' selected in the Insp Types field.

3. Click OK.
   The selected inspection types display in the Insp Types field (Figure B-4).

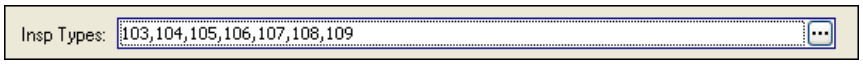


Figure B-4 Selected inspection types in the Insp Types field

Adding Checklist Items

While you are creating a checklist, you will need to add items to the list. Follow steps 1-8 in "Configuring Checklist Details" on page 72 prior to completing the steps in this section.

1. Type the description of the checklist item in the Description column of the Checklist Items table.
2. Enter a sequence number in the Seq No column. This determines the order in which the items will be displayed in the checklist.
3. Select the appropriate default state for the checklist item.

There are four available default states for a checklist item: Not Set, Checked, Unchecked, and Not Applicable. The default state will appear when an inspector first looks at the checklist item. Depending on your business rules, this indicator will either let the inspector know if the item needs to be completed or ignored. Figure B-5 shows the three available default states.

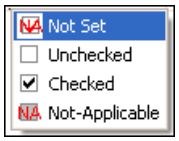


Figure B-5 Checklist item default state options

4. Select the checklist item's required state from the Required State drop-down field.

The Required State options indicate how the checklist item should be completed by an inspector, prior to moving on to the next item. There are seven Required States available: Not Required, Unchecked, Checked, Not Applicable, N/A or Unchecked, N/A or Checked, and Must Be Set. Figure B-6 shows the seven Required State options.

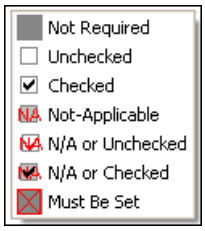


Figure B-6 Checklist item Required State options

5. Select the checklist item's fail state from the Fail State drop-down field.

The Fail State options indicate what status indicates failure for the corresponding checklist item. There are three Fail States available: Unchecked, Checked, and Not Applicable. Figure Figure B-7 shows the Fail State options.

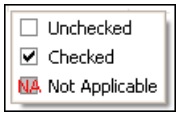


Figure B-7 Checklist item Fail State options

6. Select the Active check box. This determines whether or not the checklist item is available to inspectors in the field.
7. Select the Notice check box if you want the checklist item to appear on inspection notices.

If you want to reuse some items from another checklist, select that checklist from the Copy items from drop down list and click OK. The items from that checklist appear in the checklist item table.

8. Click OK when finished adding checklist items.

Editing Checklist Details and Items

Once you have created a checklist, you may find that you need to modify, or even delete, the settings.

Editing Checklist Details and Items

1. Choose Checklists from the Setup tool set.
   The Checklists panel displays.
2. Select the checklist you wish to modify and click Edit.
3. Modify checklist details ("Configuring Checklist Details" on page 72) and checklist items ("Adding Checklist Items" on page 74) as necessary.
4. Click OK.

Deleting a Checklist

1. Choose Checklists from the Setup tool set.
   The Checklists panel displays.
2. Select the checklist you wish to delete and click Delete.
   The Warning dialog box displays.
3. Click Yes.
   The checklist is removed from the Checklists panel.

When you delete a checklist, you will completely remove it from the system. If you think that you might need to reuse the checklist in the future, open the edit checklist window and deselect the Active check box for the checklist. This will make the checklist inactive, but available for future use.

Deleting a Checklist Item

1. From the Edit checklist window, right-click the description field for the checklist item you wish to delete.
2. Click Delete.
   The Delete Items dialog box appears.
3. Click Yes.
   The checklist item is removed from the checklist.

When you delete a checklist item, you will completely remove it from the system. If you think that you might need to reuse the item in the future, deselect the Active check box for the item. This will make the checklist item inactive, but available for future use.

Creating Custom Fields

C

APPENDIX

Your jurisdiction may have created custom fields in your permitting database which, by default, are not visible in Notebook Edition. If your jurisdiction has implemented the Custom Fields module, you can use the Custom Field Display Manager to display these fields. Inspectors will be able to view these custom, read-only fields which may contain helpful reference information such as the number of water heaters or outlets, square footage of a building, or construction value. As the InspecTrack supervisor, you need to use the Custom Fields panel to specify which fields are visible in the field application, and then customize the corresponding labels.

Custom fields must be created in your permitting database before they can be downloaded or viewed in the InspecTrack system. Each permitting database handles custom fields differently. Please refer to your user documentation for assistance.

Defining Custom Fields

In the Custom Fields panel each tab represents a data subset. After you select a subset, the display name can be edited. There are two steps to defining custom fields: identifying the fields that you want to be visible and customizing the labels associated with the selected fields. When you define labels for custom fields, you first need to select a subset and field. After selecting the field, you can edit the label to match your jurisdiction's preference.

1. Choose Custom Fields from the Setup tool set.
   The Custom Fields panel appears (Figure C-1).

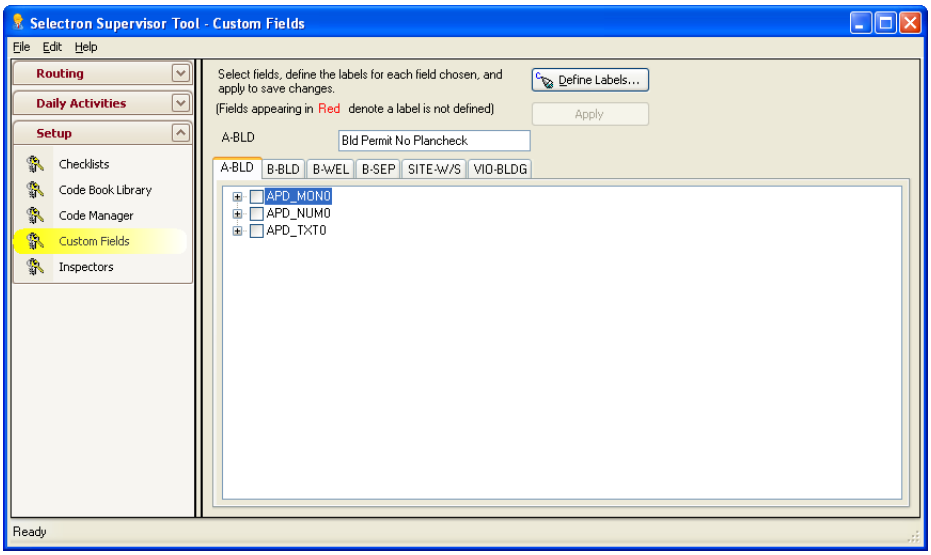


Figure C-1 Custom Fields panel

2. Select the subset tab with which you want to work.
   A list of database tables appears.
3. Expand a database table icon to view all its associated custom fields (Figure C-2).

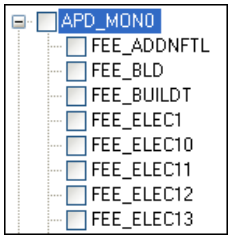


Figure C-2 Database Table expanded to show custom fields

4. Select the check box next to the custom field you want to display.

If you would like to select all custom fields in a database table, select the check box next to the table name. All custom fields are then automatically selected.

5. Click Define Labels.
   The Custom Label Definition window opens (Figure C-3 on page 81).

When a custom field is red, it means that it does not yet have a custom label. Custom labels appear in Notebook Edition and provide more information to the inspector. For example, the database field may be C_Phone#, so you might give this field a custom label of 'Contractor Phone Number.'

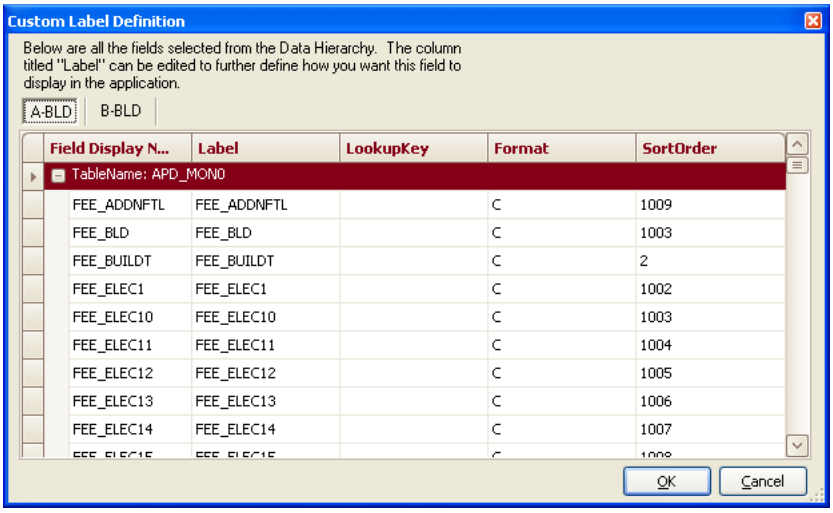


Figure C-3 Custom Label Definition window

6. Select the appropriate subset tab (the Custom Label Definition window only shows subset tabs containing fields you have check-marked).
7. Select the field name whose label you want to edit. Edit the label by typing in the label field.
8. Click OK.

Working with the Extended Tab

If you have a Tidemark permitting database, the Extended tab is visible in the Custom Fields panel. Fields that are displayed on the Extended tab are included in every subset. For example, editing the label for the "square foot" option on the extended tab will change the square foot label on subsets A-BLD, B-BLD, B-WEL, B-SEP, and SITE-W/S.

1. Choose Custom Fields from the Setup tool set.
2. Select the Extended tab with which you want to work.
   Custom fields will be displayed.

Fields that are listed on the Extended tab are included in every subset. Thus, there may be a smaller list of fields on the Extended tab than under the other subsets.

3. Select the check box next to the custom field you want to display.
   If a field has a plus sign next to the check box, it can be expanded.
4. Click Define Labels.
   The Custom Label Definition dialog box opens.
5. Select the Extended tab.
6. Select the field name whose label you want to edit. Edit the label by typing in the label field.
7. Click OK.
   The label will be changed across all subsets.

Code Book Details

D

APPENDIX

Depending on your jurisdiction, there may be multiple code books that your inspectors refer to throughout the day. InspecTrack's Code Book Details functionality allows inspectors to look up code book language from Notebook Edition, as well as cite code book language when marking a correction. Inspectors can also choose to add a code book reference to notices, in addition to printing an additional document displaying the specific code language. When multiple code books are in effect, the inspector can choose to reference the correct edition and/or modify the amount of information provided to permit holders.

In order for inspectors to cite code book details, code book information must be entered into the InspecTrack system. Code book details can be broken down into two separate parts: editions and entries. This chapter details how to import code book editions and code book entries using the Supervisor Tool.

Managing Code Book Editions

The first step to including code book details in InspecTrack is to ensure that all necessary code book editions are entered. For InspecTrack, a code book edition refers to a particular code book's title, description, and effective dates, but not its actual contents—entering the contents of a code book is discussed in "Managing Code Book Entries" on page 86. Using the Supervisor Tool, you can add, edit, and delete code book editions.

Adding a Code Book Edition

1. Choose Code Book Library from the Setup tool set.
   The Code Book Library displays (Figure D-1 on page 84).

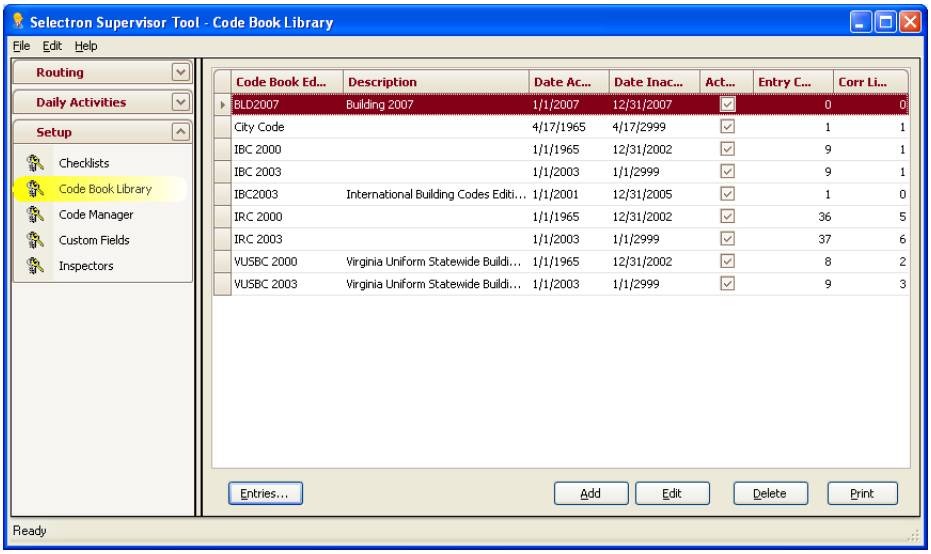


Figure D-1 Code Book Library

2. Click **Add**.
   The Add Code Book Edition window displays (Figure D-2).

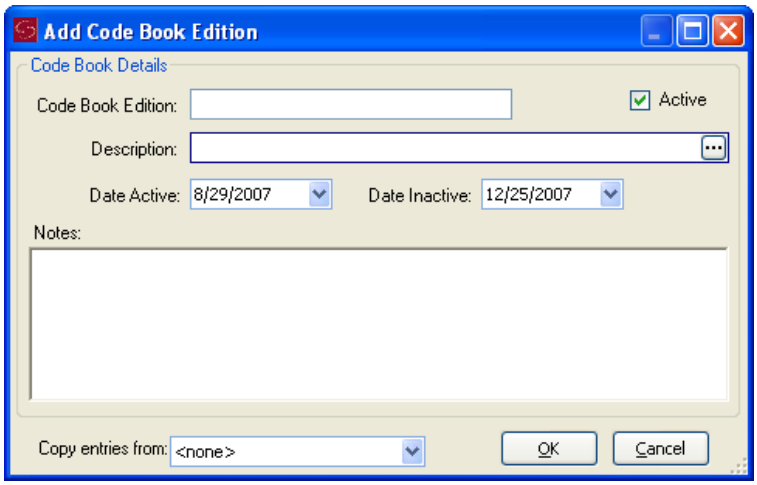


Figure D-2 Add Code Book Edition window

3. Enter the name of the code book in the **Code Book Edition** field.
4. Enter a description of the code book in the **Description** field.
5. Select the date that the code book took effect using the **Date Active** drop-down calendar.
6. Select the date that the code book expires/expired using the **Date Inactive** drop-down calendar.
7. Enter any applicable code book notes in the **Notes** field.

8. Select the Active check box to make the code book active and available to inspectors in the field.
9. Click OK.
   The added code book displays on the Code Book Editions screen.

Reusing Code Book Settings

When entering a new code book you may want to use a previously entered code book's settings. These settings include all code book entries as well as the associated corrections. You will still need to enter the code book edition, description, and active/inactive dates. For more information on adding items to a code book, see "Managing Code Book Entries" on page 86.

1. Complete steps 1-8 from "Adding a Code Book Edition" on page 83.
2. Select the code book whose settings you wish to copy from the Copy entries from drop-down list.

When copying entries, you can only copy a single code book's entries to the new edition. If you add entries from an additional code book, the original imported entries will be written over.

3. Click OK.
   The new code book displays in the Code Book Editions screen, with entries and corrections already added (displayed in the Item Count and Corr Links columns).

Editing a Code Book Edition

1. Choose Code Book Library from the Setup tool set.
   The Code Book Library displays.
2. Select the code book you would like to edit and click Edit.
   The Edit Code Book Edition window displays.
3. Revise all fields as necessary and click OK.
   The revised code book displays on the Code Book Editions screen.

Deleting a Code Book Edition

1. Choose Code Book Library from the Setup tool set.
2. Select the code book that you want to delete.
3. Click Delete.
   The Warning dialog box appears.
4. Click Yes.
   The code book is removed from the Code Book Editions screen.

You may not want to delete a code book if there is a possibility of using it again. The best procedure may be to make the code book inactive by deselecting the Active check box in the Edit Code Book Edition window.

Managing Code Book Entries

After adding a code book edition to InspecTrack, you will want to add code book entries. Code book entries include the building code numbers, as well as the specific text of the code. Using the supervisor tool you can add code book entries, link correction codes to each entry, edit entries, delete entries, and search for entries associated with a particular code book.

Adding a Code Book Entry

1. From the Code Book Library, select the code book that you want to add entries to.
2. Click Entries.
   The Code Book Entries window displays (Figure D-3).

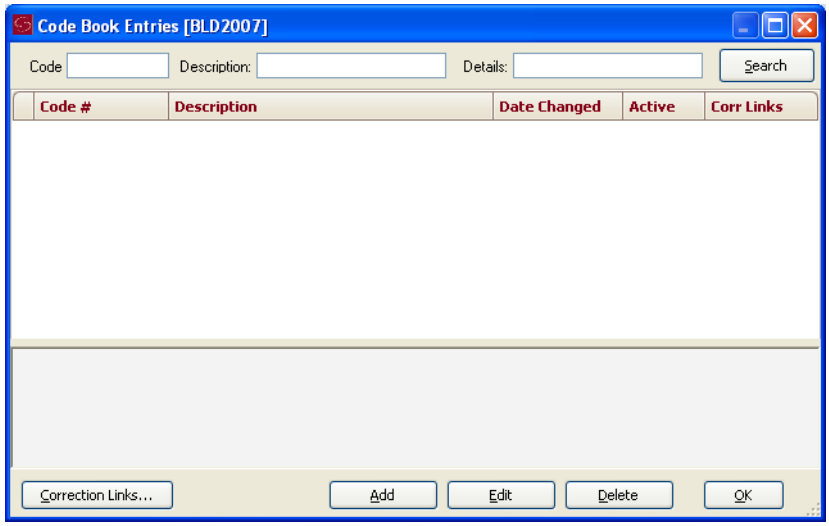


Figure D-3 Code Book Items window

3. Click Add.
   The Add Code Book Entry window displays (Figure D-4).

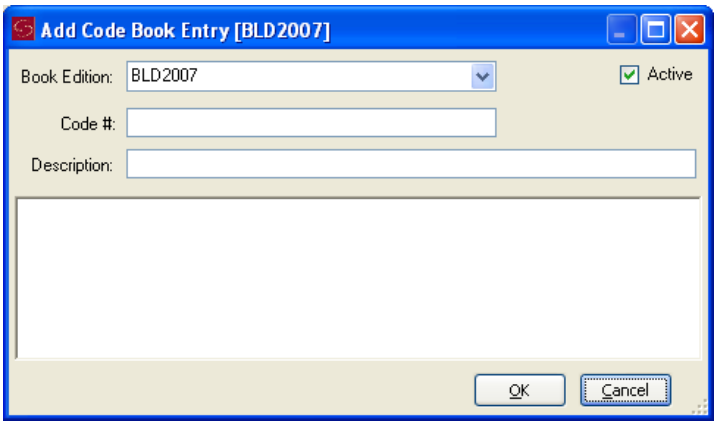


Figure D-4 Add Code Book Entry window

4. Select the correct code book edition from the Book Edition drop-down list. By default, the code book you selected in step 1 displays in the drop-down.
5. Enter the code number in the Code # field.
6. Enter a brief description of the code in the Description field.
7. Enter the text of the code into the text field.

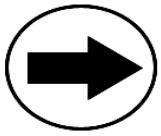
If you are entering details from an online code book, simply cut and paste the specific language into the text field.

8. Click OK.
   The item displays in the Code Book Entries window.

Linking Corrections to Code Book Entries

In order for code book functionality to work, you must assign correction codes to each code book entry. After linking correction codes, inspectors will be able to add code book details to an inspection when adding a correction during an inspection result. If correction codes have not been linked to a code book entry, the Code Book functionality will not be available in Notebook Edition.

1. From the Code Book Entries window, select the code book entry that you wish to attach corrections to.
2. Click Corrections Links….
   The Select Correction Codes window displays.



To access the Select Correction Codes window, you can also click the browse (...) button in the Corr Links column for the Code book entry you are adding corrections to.

3. Select the check box associated with each correction code that you want linked to the entry.
4. Click OK.
   The number of associated correction codes displays in the Corr Links column for the code book entry.
5. Click OK.
   The number of associated correction codes is added to the Corr Links column, for the code book, in the Code Book Library.

Searching for Code Book Entries

Finding entries in large code books might become difficult when there are numerous entries. To find an entry quickly, use the Search functionality on the Code Book Entry window. You can search for the code number, the description, the details, or by a combination of all three.

Editing a Code Book Entry

1. Select the code book from the Code Book Library and click Entries.
   The Code Book Entries window displays.
2. Select the item you wish to edit and click Edit.
3. Edit all fields as necessary and click OK.
4. To update the list of linked corrections, click Correction Links.
   The Select Correction Codes window displays.
5. Select the check box associated with each additional correction code that you want linked to the entry.
6. Deselect the check box for each correction that you don't want linked to the entry.
7. Click OK.
   The Corr Links column updates to reflect the new number of linked correction codes.
8. Click OK.
   The Corr Links columns updates to reflect the new number of linked correction codes for the code book.

Deleting a Code Book Entry

1. Select the Code Book whose entry you wish to delete and click Entries.
   The Code Book Items window displays.
2. Select the appropriate code book entry and click Delete.
   The Warning dialog box displays.

3. Click Yes.
   The code book entry is removed from the Code Book Entries window.

You may not want to delete a code book entry if there is a possibility of using it again. The best procedure may be to make the code book entry inactive by deselecting the Active check box in the Edit Code Book Entry window.

Linking Code Book Entries to Corrections

In order for code book functionality to work, you must assign correction codes to each code book entry. As stated above in "Linking Corrections to Code Book Entries" on page 87, you can associate, or link, corrections with a Code Book Entry. Alternatively, you can link existing code book entries to correction codes using the Code Manager.

1. Follow steps 1-7 in "Entering Correction Codes" on page 32 to create a correction code.
2. Select the correction code you added from the Code Manager and click Edit.
   The Edit Code window displays with a Code Edition section visible (Figure D-5 on page 89).

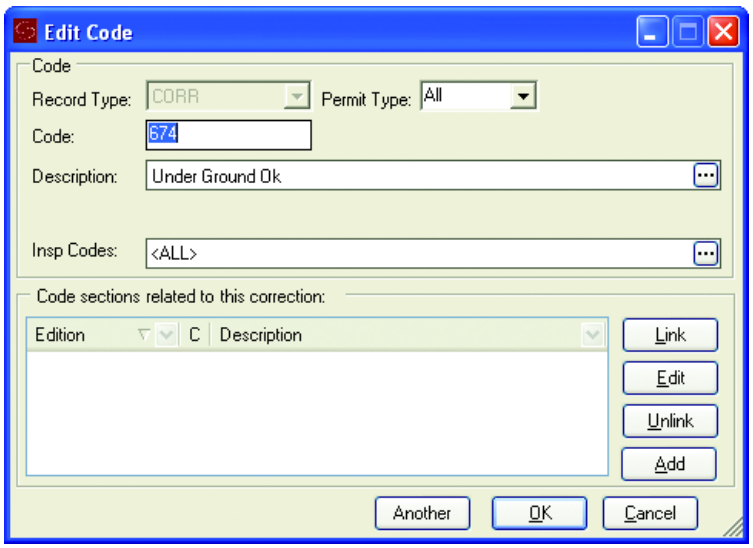


Figure D-5 Edit Code window with Code Editions section visible

3. Click Link.
   The Select Code Sections window displays (Figure D-6).

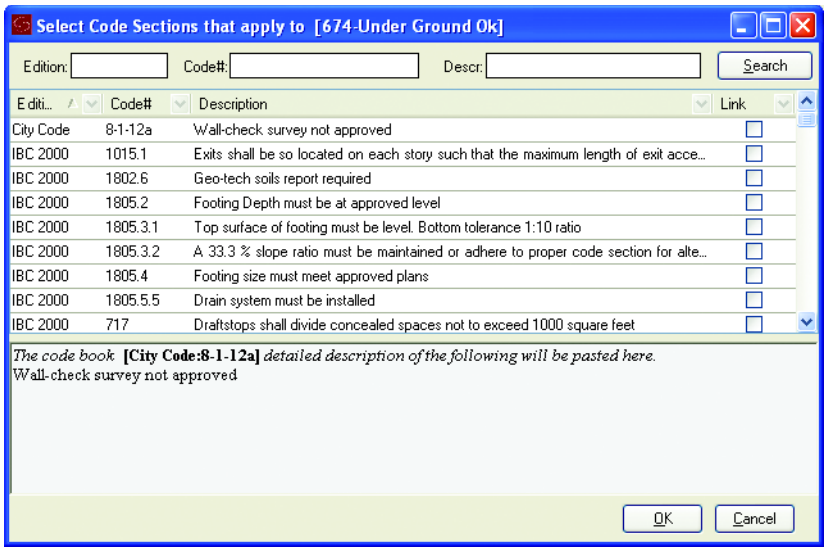


Figure D-6 Select Code Sections window

The Select Code Sections window displays all code book entries, for all editions entered into the Code Book Library. If you have a large amount of entries, use the search functionality at the top of the window to find specific entries. You can search for the edition, code number, entry description, or by a combination of all three.

4. Select the link check box for each code book entry that you would like to associate with the correction.
5. Click OK when finished.
   The code book edition details are displayed in the Code Editions section (Figure D-7).

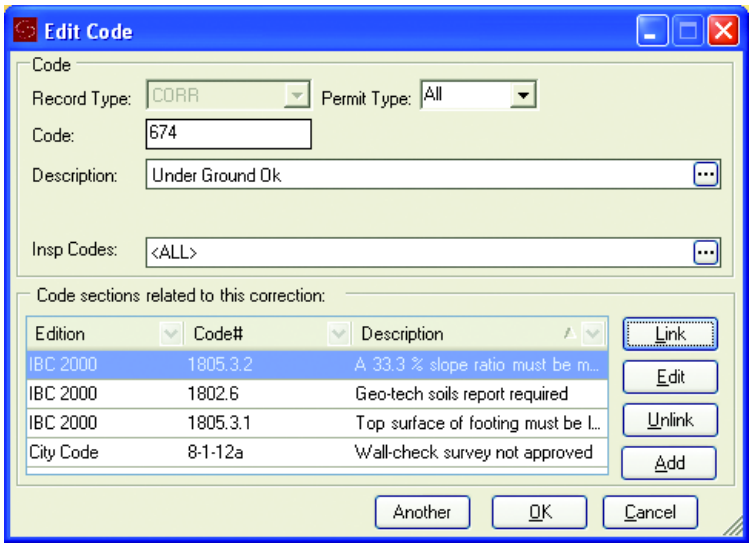


Figure D-7 Edit Code window with linked code book entries listed

6. Click OK to return to the Code Manager.

Unlinking Code Book Entries from Corrections

1. Select Code Manager from the Setup tool set.
2. Choose the code you wish to unlink from code entry and click Edit.
   The Edit Code window displays.
3. Select the code book entry from the Code Editions section that you wish to unlink and click Unlink.
   The Confirm Unlink dialog box displays.
4. Click Yes.
   The code book entry is removed from the Code Editions section.
5. Click OK to return to the Code Manager.

Adding Code Book Editions using the Code Manager

While linking or unlinking code book entries to corrections, you may need to add additional code book editions. The Code Manager allows you to add additional editions quickly, without having to go back to the Code Book Library.

1. From the Edit Code window, click Add.
   The Add Code Book Entry window displays.
2. Select the correct code book from the Book Edition drop-down list.

If the code book edition isn't available in the Book Edition drop-down, you can type the correct edition in the field.

3. Enter the code number in the Code # field.
4. Enter a brief description of the code in the Description field.
5. Enter the text of the code into the text field.

If you are entering details from an online code book, simply cut and paste the specific language into the text field.

6. Click OK.
   The code book entry displays in the Code Editions section. If you entered a new edition, it appears in the Code Book Library as an active book edition.
7. Click OK to return to the Code Manager.

Editing Code Book Entries using the Code Manager

While linking or unlinking code book entries to corrections, you may need to edit code book entries. The Code Manager allows you to edit entries quickly, without having to go back to the Code Book Library.

1. From the Edit Code window, select the entry you wish to edit.
2. Click Edit.
   The Edit Code Book Entry window displays.
3. Edit the fields as necessary and click OK
   The edited entry displays in the Code Editions section and in the Code Book Library.
4. Click OK to return to the Code Manager.

Creating a Code Book Report

To see a listing of all code books, and their associated items, you can run a code book report. The report lists each code book in the order listed on the Code Book Editions screen. The report details the code book edition, active/inactive dates, change date, code book edition notes, and all associated code book items.

1. Select Code Book Editions from the Setup tool set.
   The Code Book Editions screen displays.
2. Click Print.
   The Report Preview window opens, displaying the code book report (Figure D-8).

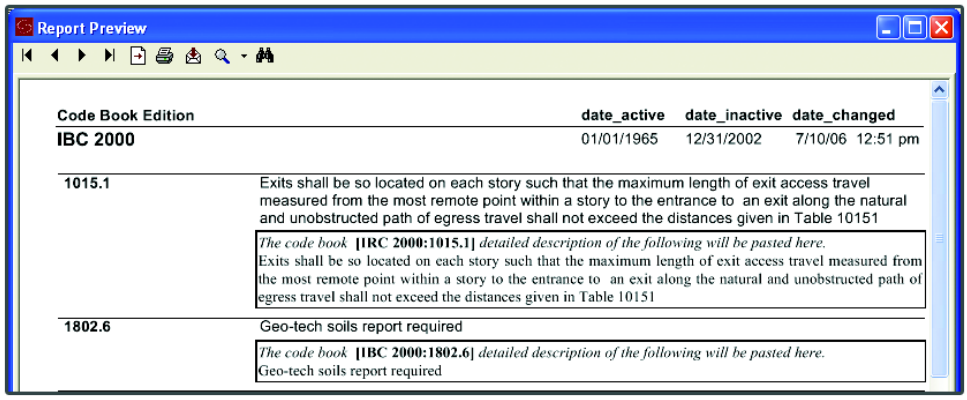


Figure D-8 Code Book Report

3. Use the Report Preview navigation bar to view or print the report. Refer to "Report Preview Guide" on page 69 for more information on using the navigation bar.

Troubleshooting

E

APPENDIX

This section outlines diagnostic tools that may help you resolve problems with your InspecTrack system. It also contains contact information and service policies. If you experience a problem with your InspecTrack system that is addressed in this section, follow the troubleshooting steps listed below:

Troubleshooting Steps

1. Identify the symptom your system is currently experiencing.
2. Go to the first Possible Cause and the corresponding testing procedure listed for that symptom.
3. If the test procedure identifies the source of the problem, you will be directed how to correct it. If it is not, you will be directed to the next Possible Cause.

If the problem requires Selectron Technologies technical support, please provide a callback phone number and a contact who will be available for 2 hours from the time of the request. Please notify Selectron Technologies if either that person or number changes during the 2 hours.

Selectron Technologies' Customer Support

All customer service and technical support calls should be directed to Selectron Technologies' Customer Support line. A Customer Support Engineer will ensure your problem is handled in a timely fashion. Service before or after Selectron Technologies' normal business hours (6:00 a.m. to 5:00 p.m. PST, Monday through Friday) will be dispatched by Selectron Technologies' answering service.

Please refer to your Support and Maintenance Agreement to determine the fees, if any, for support.

Customer Support Line: (866) 878-0048

E-mail: Support@SelectronTechnologies.com

Table E-1: Troubleshooting Issues and Solutions

Problem	Possible Cause	Solution
Inspectors Can't Sync: Inspectors report that the field application doesn't sync with the InspecTrack server	1. Inspectors do not have network connectivity	1. Confirm that the inspector's field computer has an active network connection. Verify that the inspector has a valid IP address. Ask the inspector to ping a known, working IP address. If the inspector's network connection is not active, assist them with enabling the connection. Contact your IT department for additional assistance troubleshooting your network connection, if necessary. If the inspector's network connection is active, go to the next possible cause.
	2. SmartSync settings may be preventing the transfer of certain types of data at the time that the error occurred.	2. Identify the types of data that are not being transferred. Verify that the inspector is only transferring inspection updates; digital photos and sketches may not be uploaded while inspectors are in the field. Ask the inspector to sync digital photos and sketches while in the office, or while using a high-speed connection. If this does not work, go to the next possible cause.

Table E-1: Troubleshooting Issues and Solutions

Problem	Possible Cause	Solution
Inspectors Can't Sync: Inspectors report that the field application doesn't sync with the InspecTrack server	3. The inspector login may have been deleted or modified.	3. Verify that the inspector login still exists. This can be checked by going to the Inspector Manager panel in the Setup tool set in the Supervisor Tool. Also, check if the inspector is using a valid login for their Microsoft® Windows® domain. If the inspector's login has been deleted, recreate the login. Make sure that the PIN and data subsets are included. If the PIN or subsets are missing, fill in the missing information. Recreate the inspector's Windows login, if necessary. If all fields are complete and accurate, go to the next possible cause.
	4. There's a problem with the inspector's field computer or the InspecTrack server hardware.	4. If all of the previous tests have failed, contact Selectron Technologies Customer Support.
Outdated Inspection Information: Customers or inspectors complain that inspection information is out of date.	1. There was a conflict posting inspection results or with inspection scheduling resulting in inspection information being out-of-date.	1. See "Verifying the Sync Process" on page 39 for information on checking for exceptions. Check the permitting database for any conflicts in the permits that were listed in the Exception Manager. If needed, update the permitting database. If there are no exceptions, go to the next possible cause.

Table E-1: Troubleshooting Issues and Solutions

Problem	Possible Cause	Solution
Outdated Inspection Information: Customers or inspectors complain that inspection information is out of date.	2. Inspector data is outdated; one or more inspectors need to perform a weekly sync or refresh their local databases.	2. Have the inspector perform a daily sync. If data is still out-of-date, have the inspector refresh the database. This can be performed by opening Notebook Edition, clicking on the Tools button, and then selecting the Sync tab. Have the inspector click Refresh local database. If the field application data is still outdated, contact Selectron Technologies Customer Support.
Connection Refused During Sync: The inspector receives an error message stating "No connection could be made because the target machine actively refused it."	1. The Request Server service on your InspecTrack server may have stopped.	1. Have the inspector open Notebook Edition, click the Tools button, select the Sync tab, and then click Refresh local database. If the error comes up again, there is a problem with the Request Server service. Contact Selectron Technologies Customer Support.

Table E-1: Troubleshooting Issues and Solutions

Problem	Possible Cause	Solution
Data is unavailable in Notebook Edition.	1. Inspector subsets need to be assigned.	1. Verify that the inspector login still exists. Check the Inspector Manager, in the Supervisor Tool, and verify that the necessary subsets are assigned to the inspector. Verify that the inspector is logged into their field computer with the correct login. Add the appropriate subsets to the inspector's account. See "Creating and Deleting Inspector Accounts" on page 7 for more information on assigning a subset. If necessary, recreate the inspector login in the Inspector Manager. Ask the inspector to log off and back on to their field computer. If data is still unavailable, contact Selectron Technologies Customer Support.

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