Inspect_It

Software for performing periodic detailed inspections on equipment using self-contained checklists

By: North Western Machinery (256) 777-4002

Table of Contents

System Requirements

Windows XP, Vista, 7 or, 8 computer (laptop is preferred)
A color printer (installed but not necessarily connected) capable of printing with ½" margins
A current version of Adobe Reader
Optional TOPAZ signature pad
Optional Digital camera
Optional Microsoft Access 2007 (SP2)

Installation of Inspect_It

1. Download Inspect_It from www.NorthWesternMachinery.com or place CD in drive.
    a. It may be necessary to tell your virus protection to trust this download, or turn off the virus protection until the file has downloaded and then turn it back on.
2. Click on the setup program to begin the installation
3. If you already have Microsoft Access 2007 (SP2) or Access 2010, select the option "Access 2007/2010 is already installed"
    a. All Microsoft updates need to be applied to your version of Access 2007
    b. If you don't have Access 2007 and wish to use the free runtime version from Microsoft (included in the install package), the spell check feature does not work. You must have at least one Microsoft Office 2007 product (i.e. Word) before spell checker works. If you are using the free access 2010 version, you'll need an office 2010 product.
4. Select next [default] to continue
5. Click install
6. At the end of the installation the following support programs get installed
    a. Access Runtime 2007 (If you choose to use it)
    b. Microsoft Office PDF & XPS add-on (for office 2007)
    c. TOPAZ signature pad model SigLite1X5 (TS461)
    d. dbPix picture software
7. Click finished after support programs have installed
8. Use your company's logo
    a. Obtain your company's logo in a picture (jpg) format. Dimensions of around 2 ¼ " x 2 ¼ " are preferable. Whatever the size, it will be scaled to fit.
    b. Copy your company's logo (see step 1 "Quick Guide for Getting Started…") into the inspect_It folder
9. If your company owns more than one copy if Inspect_It, then copy users/public/documents/Inspect_It/InspectItV435Data.accde from one of your another PCs to this new one. Be sure to **change the PC name** to something unique (different) to insure proper functionality

Quick Guide for Getting Started on your 1st Inspection

1. Copy your company's logo to the Inspect_It folder with the filename of logo.jpg
    a. XP folder is c:\Documents and Settings\All Users\Shared Documents\Inspect_It
    b. Vista & Windows 7 folder is c:\Users\Public\Public Documents\Inspect_It
2. Double Click Inspect_It icon on your desktop
3. Edit My Company Info (not available in trail version)
4. Add Your Name to Inspectors (remove sample inspectors if desired)
5. Add Customer Info (not available in trial version)
6. Add Equipment Info
7. Select Type of Equipment to Inspect
8. Select <new> to open a new blank equipment checklist
    a. Select customer and equipment from drop down menus

    b. Enter information as you are inspecting equipment.
    c. Exit inspection checklist form
9. Select inspection just inspected from menu
    a. Review and make changes as needed
    b. Add pictures you've taken if desired
    c. Get customer's electronic signature if desired (requires TOPAZ signature pad),
    d. Print or PDF
10. Exit inspection checklist form
11. If inspection report was PDF'ed look in PDFs folder to find the PDF to email, etc.
    a. XP folder is c:\Documents and Settings\All Users\Shared Documents\Inspect_It\PDFs
    b. Vista & Windows 7 folder is c:\Users\Public\Public Documents\Inspect_It\PDFs
12. Repeat steps 5 through 11 as needed for additional inspections

Removing Sample Data

- Delete ER's company
    - Click "Customer Add/Change"
    - Make sure ER's company is showing on screen
    - Click "Delete Customer"
        - At the prompt: "Deleting this customer will also delete 3 pieces of equipment and 4 inspections against this equipment. You can't get this data back, are you sure?"
        - Click "Yes"
- Delete Imported Inspections (Company name is not in database)
    - Click "Hydraulic Telescopic Crane"
    - Click "Truck & Tractor Rental"
    - Change HrsUp to -9
    - Click exit
    - Click "Lattice Crawler Crane"
    - Click "Midtown Steel"
    - Change HrsUp to -9
    - Click exit
    - Click "Load Test"
    - Click "Truck & Tractor Rental"
    - Change HrsUp to -9
    - Click exit
    - Click "Delete Inspections where HrsUp = -9"
    - At prompt: "You are about to delete 3 inspections"
    - Click "Yes"
- Click "Inspectors Add/Change" to remove test inspector's names
    - Find Greg Beam (Click next inspector or previous inspector if necessary)
    - Click "Delete This Inspector"
    - Click "Yes" at the warning message
    - Find Bob Tester
    - Click "Delete This Inspector"
    - Click "Yes" at the warning message

Main Menu

Select Type of Inspection

- This box contains a list of each type of inspection in your database

- If you don’t have any inspections for a particular checklist, the checklist name is shown.
- Click any checklist/inspection name to show all inspections of this type in the inspections box

Sort Selected Inspections

- The inspections showing in the inspection box can be sorted by any of the 5 pre-selected categories
- Date (Descending) – most recent inspections are at the top
- User Name – User Name, Manufacturer, Model, Date (Descending)
- Manufacturer - Manufacturer, Model, Date (Descending)
- Model - Model, Date (Descending)
- Serial No. – Serial No, Date (Descending)

Filter Inspections

- The inspections showing in the inspection box can be filtered by any of the 4 pre-selected categories. After selecting one of the 4 categories, start typing until you see what you want filtered the press return. For example, if you want all TEREX cranes, click manufacturer, and start typing TEREX. When you see TEREX highlighted in the box just below where you are typing, press enter or click. The inspections box will contain only TEREX cranes.
- Remove Filter – to remove a filter setting and show all completed inspections for a particular checklist
- User Name – User Name, Manufacturer, Model, Date (Descending)
- Manufacturer - Manufacturer, Model, Date (Descending)
- Model - Model, Date (Descending)
- Serial No. – Serial No, Date (Descending)

Select an Existing Inspection

- The inspections box lists all the inspections in the database for the type clicked in the Type of Inspection box.
- If you have a checklist or template for performing a new inspection, then <New “Checklist name”> will appear as the first item in the inspections box.
- Typically all inspections will have a corresponding checklist or template and <New “Checklist name”> will be the first thing listed.
- However, if you import an inspection that was done from a checklist you don’t have, the <New “Checklist name”> is not shown and doing a new inspection is not an option. Contact North Western Machinery to obtain new checklists for a fee.
- Click <New “Checklist name”> to start a new inspection
- Click any existing inspection to edit that inspection

Start a New Inspection

- Click <New “Checklist name”> where Checklist is the name of the inspection you want to start
- If there are multiple inspectors, you must select an inspector’s name
- Select Customer from the drop down
  - The list of customers will be limited to only those customers that have equipment of some kind.
- Select Equipment from the dropdown
  - The list of equipment will be limited to the equipment owned by the customer you’ve previously selected
  - In addition, the list will be further limited to equipment matching the inspection you selected
  - For instance, if you are doing an aerial lift, equipment with a Hook & Block will not be available for selection
- This inspection form is filled in with information about this piece of equipment you’ve selected.
- Enter hours up (text may be used if needed)
  - Note: enter -9 to mark this inspection for deletion, if this inspection needs to be trashed
- Enter hours low (text may be used if needed)

- Make adjustments to main block, headache ball and auxiliary (if applicable) as needed based on the configuration of the equipment now, as you are inspecting it.
- Move through the checklist, item by item, recording findings in the yellow box.
  - To go to the next item press page dn, or click the ▶ in the lower left corner
  - To go back to the previous item press page up or click ◀ in the lower left corner
- If you select "OK" and type something, the comments will appear on the printed report and also in the Recommendations Report. If the comments are longer that 70 characters, it will appear only on the Recommendations report.
- If you select "X" the item with comments will appear in the deficiency report
- If you select N/A and type something, the comments will appear on the printed report and also in the Recommendations Report. If the comments are longer that 70 characters, it will appear only on the Recommendations report.
- Pass & Fail are used for checking method in the hook and block section
- Selecting Misc opens the "Wear/Size" window and allows you to type data in the "KEY" column. This is typically used for wire rope and other measurements and is limited to 15 characters, but it can be used for anything where the standard key selections don't work.
- Use Quick Nav to quickly move to a section of the checklist by clicking the words for the heading you want
- Click "View Previous Inspections" to compare all previous inspections for this equipment serial no. Quick and Compare show the same information, but in different formats. Only lines that have information will be displayed. In other words, lines where the remarks are blank will not be displayed.
- Click exit when you have completed your initial assessment.

Edit existing inspection

- Click any existing inspection to edit that inspection
- Add an Equipment Picture to the first page of the inspection, if desired.
- Review and adjust any wording you've entered.
- Add Pictures you've taken (if desired)
  - Click on the "Pictures" button
  - If your camera attached to your laptop with an USB cord, the laptop likely assign's a drive letter or place the camera's memory card in the computer
    - When you click "Add Picture", use this drive letter to add pictures
  - If not, transfer the pictures to a place on the laptop's hard drive
    - When you click "Add Picture", use this place on your hard drive to add pictures
  - Place remarks about the picture in the picture remarks box.
  - If you wish to load multiple pictures a once, click the "Add Multiple Pictures" button. Select multiple pictures using the standard windows Shift Click or Crtl Click feature.
  - In the event you'd like to re-arrange the pictures, then change the sort order to match the desired sequence and click the re-sort button.
  - The other buttons on the pictures form are self explanatory
- Get signatures (Requires a TOPAZ Signature Pad)
  - Inspect_IT comes pre-loaded with software for TOPAZ TS461-HSB
  - Make sure signature pad is plugged in to your laptop
  - Review the inspection with your customer
  - Click "Get Signatures"
  - Click "customer signature"
  - Have customer sign pad and click accept
  - If you entered your signature on the inspectors form, your signature will display
  - If not, click "Inspector's Signature", and sign the pad
  - Click "Done"
- Keep a picture of a signed deficiency page with the inspection

        - In the event it is not convenient to get a customer's signature when your inspection is complete, you can get your customer to sign the deficiency page and send you a picture of the signed page using a smart phone or camera. If you get a fax of the signed signature page, you must scan it into a picture format like jpg, png, etc.
        - If it is not convenient to get the deficiency page signed, have your customer sign a blank piece of paper with a date and take a picture of the signature and use it.
        - Once a picture of the signed deficiency page, or a signature on paper can be accessed by your computer, you can save it as part of the inspection and each time the inspection is printed (or PDF'ed) the picture of the signed deficiency will print also.
        - Click the inspection in question and the edit screen opens
        - Click signatures
        - Click which type of signature, blank paper or deficiency page.
        - Locate the picture and click it. You will see it appear on the screen.
    - Print the inspection
        - Click "Print This Inspection"
        - Before showing the Print Options screen, Inspect_it checks the inspection
            - If this is equipment with a Hook & Block, the checking method must be completed. If it is not, and error message is displayed and the checking method screen is displayed.
        - Select the parts of the inspection report you want to print by selecting the appropriate options
        - Click "Print This Inspection" to print report on paper
            - Select the printer you want from the list of printers on your laptop
            - The Left box
                - Click reverse order if you want the last page printed 1st. This is useful for inkjet printers
                - Click "Print All Reports" for a complete inspection report
                - Or click any section by clicking on the section name
            - The Right Box
                - If you need specific pages printed, fill in the page numbers
                - Click "print pages"
            - Click "View Reports on Screen" to preview the inspection report
        - Click "PDF This Inspection" to print report as a PDF to a file
            - A PDF is generated in the following folder
                - XP folder is c:\Documents and Settings\All Users\Shared Documents\Inspect_It\PDFs
                - Vista & Windows 7 folder is c:\Users\Public\Public Documents\Inspect_It\PDFs
                - You may want to delete PDFs after you are finished
            - See IILog.txt on your desktop for a history of PDFs and Synchronization

Customers (Add/Change/Delete)

- Adding a new customer
    - Click "New Customer". Inspect_It uses information in the owner/user for the inspection report title block and the address for printing envelopes. All other information is for your reference and is not used by Inspect_It.
- Change something on an existing customer
    - Find the customer to edit by:
        - Select or typing then select the name from the "find a user to edit" drop down or
        - Press page up or page down until you see the customer you wish to edit

    - Make necessary changes
    - All new inspections will reflect these changes
- Delete the customer
    - Find the customer to delete by:
        - Select or typing then select the name from the “find a user to edit” drop down or
        - Press page up or page down until you see the customer you wish to delete
    - Once the customer you want to delete is being displayed, click the “delete customer” button.
        - If the customer does not have any equipment or inspections in the database it will be deleted.
        - If the customer does have equipment and inspections in the database, you will be given a warning message to confirm you want to delete the customer, any equipment belonging to this customer, and any inspections done for this customer.
- Find a customer using the binoculars button
    - Click in the field you want to search
    - Click the binoculars button
    - Click the “Match:” dropdown and select what’s appropriate for your search
    - Example: Someone called you but can’t make out the message they left. You recognize the number as someone’s cell phone. Assuming you’ve entered their cell phone in Inspect_It, then you can find the customer by clicking the cell phone field, then clicking the binoculars, typing in some (or all) of the number, selecting “any part of field” from the “match:” drop down, and clicking “find next”.
- If you decided to abandon adding a new customer before you are finished, you must press the esc key twice before pressing the exit form button

Equipment (Add/Change/Delete)

- Adding New Equipment
    - Before adding new equipment, make sure you have entered the customer who owns this equipment first.
    - Click the new equipment button
    - Select the equipment owner from the drop down
    - Fill in the other information on the screen. All the information being asked for is displayed on the Inspect_It reports in some form or another.
    - Be sure to check (click) “Equipment has hook and block” if appropriate and fill in information requested. The hook and block information can be changed for each new inspection depending on how you find the equipment at the time of the inspection. You want to enter how the equipment is typically configured here.
    - The serial number for each piece of equipment must be unique. In other words, no two pieces of equipment in you database can have the same serial number. Serial number is what is used to find and view previous inspections. If you try to enter a serial number already in use, you’ll get an error message. Most of the time this error occurs when equipment is being entered that is already there, and you are trying to enter it again. There is a slim change two pieces of equipment have the same number. If that occurs, add something like a period or extra letter to make it unique.
    - If you decided to abandon adding a new piece of equipment before you are finished, you must press the esc key twice before pressing the exit form button
- Changing something on equipment you’ve already entered
    - Select the customer who owns the equipment in the “which customer owns equipment to edit” dropdown, then
    - Select the equipment by pricking from the “find equipment to edit” dropdown. Only the equipment owned by this customer will be shown in the drop dropdown.
    - You can instead press page up or page down to find the equipment to edit if that is easier
    - Make changes as necessary.
    - All new inspections will reflect these changes

- Changing the owner of equipment
    - This is not used often, but when equipment is sold to another, you can retain the inspection history by simply changing the owner.
    - Find the equipment by using the dropdown or page up or page down keys as described in the changing equipment section.
    - With the equipment you want to change ownership showing on the screen, select "change owner of this equipment" button.
    - All new inspections will reflect these changes
- Deleting Equipment
    - Find the equipment by using the dropdown or page up or page down keys as described in the changing equipment section.
    - Click "delete this equipment" button.
        - If there are no inspections in the database that pertain to this equipment, it will be deleted
        - If there are inspections for this equipment, you will be given a warning message. If you choose to continue, the equipment and all relative inspections for this equipment will be deleted.
- Find a Equipment using the binoculars button
    - Click in the field you want to search
    - Click the binoculars button
    - Click the "Match:" dropdown and select what's appropriate for your search
    - Example: You know the main block is a Johnson. Assuming you've entered this information in Inspect_It, then you can find the equipment by clicking the "make" field under main block, then clicking the binoculars, typing in some (or all) of the word "Johnson", selecting "any part of field" from the "match:" drop down, and clicking "find next". Click "find next" again if this is not the correct equipment.

Edit My Company Information

- Line1: Enter your company name as you wish it to appear in all title blocks of reports and return address on envelops
- Line2: Enter your street address (there is only one line assigned for street address)
- Line3: Enter your City, State and Zip
- Line4: Enter your phone number. This number appears multi places on reports
- Line5: Not Used at this time
- Line6: Not Used at this time
- Line7: Place your email address here. It is used when registering you product
- Line8: Default Sync Location (example - e:\MySync\InspectIt_V435Data.accdb) All characters after the '(single quote) are ignored.
- Line9: Not Used at this time
- Line10: Place a 1 to 5 character name for your PC here. This is used by synchronization and **<u>must</u>** be unique within each company. All characters after the '(single quote) are ignored.
- Line11: Not Used at this time

Change Inspection (checklist) Wording

- Comments:
    - Inspect_It provides minimal ability to change Checklist wording. New checklists and major wording changes to existing checklists are provided by North Western Machinery for a fee.
    - Inspect_It does provide for wording changes to any checklist item, but does not provide for adding or deleting lines.
- Click continue to make wording changes
- Click checklist you want to change

- Keep in mind the changes you are making apply to new inspections only. Old inspections retain the wording of the checklist that was in use at the time of the inspection.
- The format of the line is important
  - Each Description heading must begin with a (#) where # is a number or letter. The parentheses must be present.
  - The description detail must begin with #. Where # is any number or letter and end with a period.
- Reference is typically an OSHA or ANSI reference number, but anything can be placed here. The reference number appears on the deficiency report with the checklist item and the deficiency you, the inspector, found and typed into Inspect_It.
- Auto N/A and other features
  - Typically you do no need to changes anything is this field, but if you make enough changes, you'll likely need to change Auto N/A, too
  - This field changes the behavior of how the checklists are displayed, how data is entered, and how some fields are filled out.
  - Auto N/A feature
    - By allowing for generic checklists, some items will not be applicable for all equipment. When an item is not applicable to the equipment you are inspecting, it should be "N/A"ed.
    - Example: Hydraulic Telescoping Crane checklist
      - Not all Hydraulic Telescoping Cranes have an Air Compressor (4) A. – (4) F.
      - But all compressors have a safety valve (4) A.
      - If I don't have a safety valve I don't have a compressor either and I can "N/A" all fields that have to do with a compressor based on my answer of "N/A" for the safety valve.
      - In other words, if I inspect a crane without a compressor, all I need to do is "N/A" one item and it will trigger the others to get "N/A", too.
    - Pick the description detail that if N/A'ed means all like description details get N/A'ed, too. In the example above it was the (4) Air Compressor A. Safety Valve.
    - Put a slash then any letter (A-Z) to trigger Auto N/A. In the example above Item (4) A. is the trigger line and set to /A. The slash triggers a search for other "A"'s and N/A's them, too
    - Put just the single letter, without the slash ("A" in the example) on all other items that get set to N/A based of the trigger line. In our example it was lines (4) B. – (4) F.
    - Note: the trigger line must be set to "N/A" to cause the Auto N/A to fire. Any other value is assumed to be legitimate and does not trigger the Auto N/A.
    - The Auto N/A's don't have to be in the same group. See (6) Auxiliary Hoist Winch A. Condition of hoist break & brake control system. If line (6) A. is set to N/A, then it triggers (6) B. – (6)I. and (16) A. - (16) P. to be set to N/A as well.
    - Make sure character after / is limited to letters. Upper case and lower case are treated the same. Therefore, there is a maximum of 26 different triggers per checklist.
- Sometimes it is necessary to have a catch all line(s) for things the checklist does not cover.
  - If you want to change the description detail "on the fly" while inspecting the equipment use a squiggly ~.
  - If you place a squiggly ~ in the Auto N/A box, the description line opens up for editing, but whatever you type, only effects the current inspection. It does not change the checklist template. See (14) Miscellanous A. – C. in Hydraulic Telescoping Cranes for an example.

- The default value for each checklist item is set here and this is what initially shows on each new inspection.

Edit Report Wording

- Comments
  - Inspect_It gives you the ability to customize how your reports look by allowing your own wording and pictures in certain places on certain reports.
  - Be sure and click the refresh button to see any changes you've made.
  - A text box, for wording, can be a maximum of 7.9" wide by 5.5" high. The text box can display different fonts, size, color, and annotation common to any word processor. You make these kinds of font changes by selecting the text, and moving the cursor to the upper left corner of the selected text. A small option box appears that allows these types of font changes to be made.
  - A picture box can be a maximum of 7.9" wide by 5.5" high. The picture will be resized to fit the size of box you put it in.
  - There is one text box and one picture box per item. They can overlap each other, so test on an actual inspection to see how it will look.
  - This wording is kept with each inspection. Therefore you cannot edit report wording an old or completed inspection. Report wording is added each time a new inspection is started.
  - If you don't want to use any one of the wording features, click hide and nothing will be printed.
  - Each checklist has its own report wording and this report wording is used when printing a report.
  - To edit report wording for a particular type of checklist, be user to click on the checklist so entries are displayed in the bigger box with all previous inspection.
- Report words to edit
  - Magnetic - When the block, ball and/or auxiliary are inspected by you, you must pick between 1 of 3 choices (Visual, Magnetic, or Dye) documenting what you did. If you choose magnetic, an extra page describing the details of the magnetic test is printed. Inspect_It provides a sample magnetic test details template as a starting place. You need to make the necessary changes to this template to reflect your way of testing with your particular type of equipment. This template gets copied onto the inspection report and can be modified as needed to meet the needs of each inspection.
  - Deficiency report footer (rptDefFoot) – the text and picture will display at the bottom of the deficiency page just above the signatures in the inspection report.
  - Deficiency report header (rptDefHead) – the text and picture will display just above the title block the deficiency page just above the signatures in the inspection report.
  - Hook & Block key below title block (rptHookBlock) – the text and picture will display between the title block and the inspection wording on the hook & block page in the inspection report.
  - Main report 1st page only (rptMainHead) – the text and picture will display between the title block and the inspection wording on the first page in the inspection report.

Inspectors (Add/Change/Delete)

- Comments:
  - You can have multiple inspectors on any given computer. You will be prompted to select an inspector at the beginning of each new inspection if there is more than one inspector.
  - You can store each inspector's signature here and it will be placed on each new inspection. You can choose not to sign here and sign with the customer at the end of the inspection if you wish.
  - At the beginning of each inspection, the certification date is checked. If the certification is not current, the inspection will stop.
  - To use the signature feature, a TOPAZ signature pad is required. Inspect_It comes with software to support the SigLite1X5 (TS460 or TS461)

Delete Unwanted Inspections

- In the event you want to delete an inspection, open the inspection and enter -9 (negative 9) for HrsUp and close the inspection. Click the "Delete Inspections where HrsUp = -9" button and all inspections with -9 in HrsUp will be deleted.
- You can change multiple inspections HrsUp = -9 and delete them all at once.
- To delete all inspections done for a particular customer or piece of equipment, delete the customer or equipment and all inspections will be deleted, too.

Synchronize Inspect_IT Databases

- Comments:
  - Synchronization is between Inspect_It databases only. It is not intended to import or export anything else. If you have previous inspections from other sources you wish to import into Inspect_It, then contact North Western Machinery. This service is provided for a fee.
  - With pictures, it is easy to export a file too large to send via public email. Most public email services limit attachments to 25 mbtyes. You may need to send only a few inspections at a time or use services like Dropbox or Google Drive to store the data on the web and send a link to the data so it can be downloaded.
  - You can export only one type checklist/inspection type at a time, but multiple inspections of the same type.
  - The more inspections you import/export the longer it takes to process the information.
  - What information is synced
    - Customers
    - Equipment info
    - Headings (i.e. date, time block, ball, aux, signatures, the equipment picture, etc)
    - Details (each item on the checklist and the comments that go with it
    - Pictures
    - Load tests
    - Wire rope table
  - What information is not synced
    - Company Info
    - Inspector(s) names
    - Report wording
    - Inspection Checklists/Templates -You may import, edit, and print inspections from others, but unless the inspection template that matches the imported inspection type is present, you can not make a new inspection.
- Exporting
  - Click "Export Inspections to send"
  - Click the type of checklist/inspection you wish to send
  - Sort the inspections shown in any order you wish
  - Select one or more inspections
    - Hold down the shift or ctrl key while clicking to select multiple inspections
  - Click "Add Selected Items to Send List"
  - As long as you don't change the type of checklist/inspection you can re-sort, select more inspections and click "Add Selected Items to Send List" multiple times
  - Once you have finished adding inspections to the send list, click "Done Selecting … Package Items to Send"
  - A blue box appears while the inspections are being packaged
  - A message appears on the screen indicating the export file name

- Once this is complete the blue box goes away and you can select another checklist/inspection type and continue exporting, if desired.
- The exported files can be found in the following folder:
  - XP folder is c:\Documents and Settings\All Users\Shared Documents\Inspect_It\Sync\Export
  - Vista & Windows 7 folder is c:\Users\Public\Public Documents\Inspect_It\Sync\Export

- Importing
  - If an inspection already exists in your database, only the parts with more current information will actually be imported
  - In order for Inspect_It to “find” inspections to import, the file(s) exported from another Inspect_It database must be place in the import folder.
    - XP folder is c:\Documents and Settings\All Users\Shared Documents\Inspect_It\Sync\Import
    - Vista & Windows 7 folder is c:\Users\Public\Public Documents\Inspect_It\Sync\Import
  - Click “Import Inspect_It Inspections sent from others”
  - From the list of files found in the import folder, click one
  - The inspections contained in the file appear in the inspections box. Select one or more inspections to import into your database
  - Click “Add Selected Items to Import”
  - Once you’re finished adding inspections to import, then click “Done Selecting…Import Items into my Database”
  - A blue box appears while inspections are being imported
  - When the blue box goes away, the items are in your database. The import file is deleted for you.
  - Select the next file to import, if any, and repeat the process.
  - You can now open, edit, view and/or print the imported inspections.
- Total Synchronization
  - Total synchronization is designed to be used on a home or office network where two (or more) Inspect_It databases reside.
  - Only two databases can sync at a time.
  - The versions of Inspect_It must be the same
  - All Customers, all Equipment, & all inspections are synch’ed during a total synchronization. Inspectors, checklists & report wording are not shared.
  - You will not be able to select what gets sync’ed in a total synchronization.
  - Synchronization is a two way street. Information is shared between both databases.
  - Conflicts are resolved based on last modification date. The newest data gets kept.
  - Click “Total Synchronization with another Insect_It database”
  - Inspect_It will look for the other database at the default sync location read from the company info table, line 8. If it can’t be found, then you must “Find” the other Inspect_It on a network drive or equivalent.
  - Total Synchronization was designed for the following scenarios:
    - Make sure each laptop has a unique name. See line 10 of edit my company info button. Each laptop must have a unique name or synchronization will not work. Inspection numbers generated by Inspect_It are prefixed with this name to insure each laptop does not generate the same inspection number.
    - Your company/office has multiple inspectors and multiple laptops. Your office has a network with a server/PC and shared network drives. The laptops map to this drive when they are in the office. Note: using dial-up or other remote connections are not recommended. Place a copy of just the file InspectItV435Data.accdb on the server/PC where all the laptops can “see” it. You must tell access to trust this location on the server (North Western Machinery will assist, if necessary, at no charge). When in the office, select total synchronization, and point to InspectItV435Data.accdb on the server. The server copy of the data will lock (so only one person can sync at a time) during the synchronization and will unlock when complete.
    - Another scenario is using usb or thumb drives and syncing 2 laptops.

    - While this scenario is for two laptops, there is no reason it won't work on more than two laptops. Use the default sync location to save a few mouse clicks.
    - Do this step only once. Dedicate a thumb drive for the purpose of syncing and use it all the time. Copy InspectItV435Data.accdb from one of the laptops onto the sync thumb drive once. Don't do this step again.
    - Place the thumb drive in laptop1 and click synchronization, total synchronization.
    - After laptop 1 is finished, remove the thumb drive and place it in the 2nd laptop where Inspect It is installed. Run total synchronization on the laptop 2.
    - Place the thumb drive back in laptop 1. Run total synchronization on the laptop 1 again.
    - Open Inspect_It on each laptop and look for new data.
- Export PDFs to Inspect_It PDF Keeper
  - A copy of the Inspect_It PDF Keeper program is required to "Import" this data.
  - You may select multiple inspections of the same type to be included in each export. If you wish to export another type of checklist, you can do so, but a separate file will be generated.
  - The company name, make, model, unit, and serial number along with a PDF of the entire inspection is exported.
  - If a PDF for the inspection already exists in the inspect_It/PDFs/ folder, it will be used. If one does not exist, one will be generated.
  - The file is compressed and placed in the Inspect_It\Sync\export folder. The filenames start with IIsync and end with 7z. Do not attempt to change the filenames.
  - If the file contains multiple inspections, it may be too large to email. Use a service like Dropbox or Google Drive to send large files over the internet.
- Synchronization Log
  - The synchronization log is there to help you remember what was synchronized and when
  - Click view sync log
  - The information can be erased whenever you want by clicking "Erase all Sync log entires"

Fun Facts

- Fun Facts
- Quick List by Equipment
- Quick List by Customer
- Quick List by Inspection
- Quick List by Serial No.

Inspections Due

- Choose how many days (typically 365 for annual inspections) since the last inspection
- A list of inspections that are older than the number of days you entered will display

Envelope & Labels

- Place a check (click the small box at left) in every label or envelope you wish to print
- Inspect_It is formatted for Standard No.10 envelops
- Inspect_IT uses label sheets with 30 labels (3x10) with each label being 1" x 2 5/8" (Avery 5160)

Compact Back End (Data)

- The part of Inspect_It that holds your data (InspectItV435Data.accdb) needs to be compacted occasionally

- When you exit Inspect_It, a check is done to see if 30 days passed since the last compact.
- If 30 days has passed, allow Inspect_it to compact your data.
- A backup copy of your data is made (InspectItV435Data.bak)
- The more inspections you have in Inspect_It the longer this step takes.
- If you look in the inspect_it folder, typically the "bak" file is larger that the "accdb" file.

Delete a Checklist

- Inspect_It can hold many different kinds of checklists.
- After you delete a checklist, you may still see the checklist in the Equipment Type box.
    - This means you have inspections that used this checklist
    - Delete all the inspections using this checklist and it will be gone from the Equipment type box, too.
        - You can delete each inspection individually by typing -9 in the HrsUp box or
        - Delete the equipment that was inspected using this checklist and the inspections will be deleted, too. Warning: by deleting a piece of equipment, all inspections will be deleted including those done by a different checklists other than the one you are deleting now.
- Click "Delete a Checklist"
- Pick the checklist to delete from the drop down
- Click "Delete this Checklist" button
- Click "Yes" to confirm you are sure

Add a Checklist

- Checklists are added to Inspect_It using another program. This program is specific to each checklist. North Western Machinery will provide you with new checklist programs for a fee. The fee is based on the condition of the checklist we receive. For example, if the check list is already typed and in a format like excel or word, the process is short. We charge $45/hr to prepare checklists. Once you have a checklist program, you can use it to add the checklist to Inspect_It on as many of your company owned laptops as you wish.

Trusted Location Utility

- This utility is used in the synchronization of Inpsect_It databases.
- Since MS Access, like the other office products, has the ability to execute underlying programs, it is necessary for Access to know which folder to trust and allow these underlying programs to run. This utility tells Access which folders to trust. If you are running the free copy of Access, you'll need this utility. If you purchased a copy Access, you can do it yourself, or use this utility.
- The utility tells access to trust the folder X:\MySync\ where X = E, F, G or H.
- The utility adds one trusted location at a time. If you want to add more than one, run the utility again.

Contact Us

Greg@northwesternmachinery.com
(256) 777-4002