



Inspections User Guide



Configuring and performing scheduled, ad-hoc, and dynamic building inspections

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Inspections

The Inspections Manager provides a centralized management system for configuring and scheduling property inspections. The inspection templates can be created for a variety of question types and styles, and include conditional and/or photo responses. Performance evaluation can be configured through scored inspections, in addition to automatic work order creation upon a failed inspection point. Dynamic Building Inspections can also be built to customized occupancy, equipment, or room type specifications.

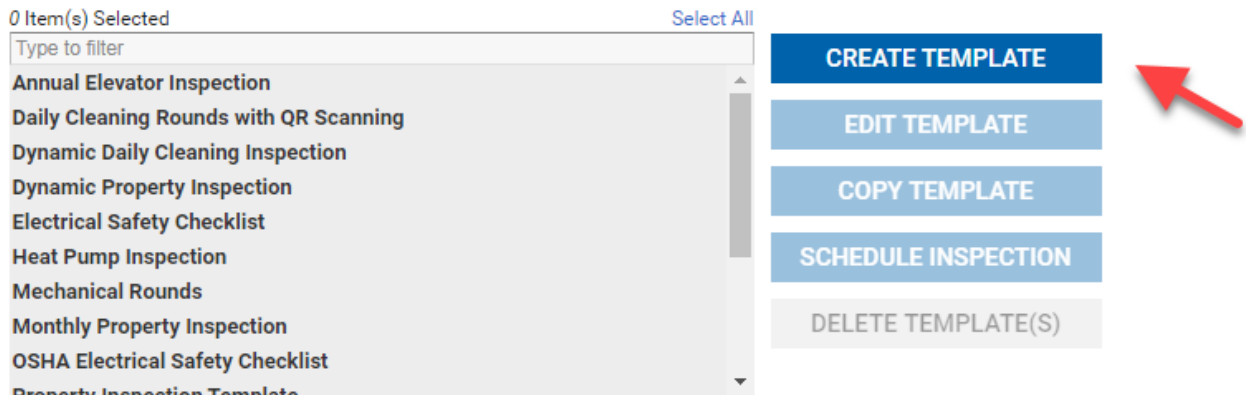
Creating a New Inspection Template

An Inspection Template is a collection of inspection questions, response types, and requirements. Templates not only expedite the inspection setup process, but also provide standardization across your portfolio.

This section describes how to create a new building inspection template.

To create a building inspection template:

1. Click **Go To → Inspections → Inspections Template Manager**.
2. Click **Create Template**.



3. Provide a **Template Name** and select the **Type of Inspection**.
4. (Optional) To create custom header questions, click the **Customer Header Questions** field, and enter your questions.
5. Complete the **Inspection Completion Options**.
6. Click **Save and Continue** to begin creating inspection questions.

7. (Optional) You can divide groups of questions into sections. To create a section:

- a. Click **Add Section**.
- b. Enter a **Name** for the section, and click **Save**.

Note: You can rearrange sections by selecting and dragging the section to place them in a different order.

8. Select the (+) icon to create a new question. Select a format for your first question, enter your question in the provided field and click **Save** to add the question. Depending upon the question type selected, the following options can be applied to the question and/or response:

- a. Require Response: Inspection cannot be completed without a response.
- b. Require Photo: Inspection cannot be completed without a photo.
- c. Add Another Response: Click to add additional responses to your question.
- d. Optional Prompt: Allows you to ask a follow-up question to a particular response.
- e. WO: Automatically generates a work order if a particular response is selected.
- f. Photo: Prompts the inspection assignee to add a photo if a particular response is selected.

Note: Hovering over a question type displays an example of the question format. You can also rearrange questions once saved by selecting and dragging the question to place them in a different order.

Uncategorized +

No Questions Found

Customize Your Question and Responses

Option-based Questions

- Multiple Answer Checkboxes
- Single Answer Radio Buttons**
- Single Answer Dropdown

Other Questions

- Scan Response Input
- Photo Response Input
- Numeric Response Input
- Single-line Response Input
- Textbox Response Input

ENTER YOUR QUESTION *

Require Response Require Photo Allow N/A

Responses	Optional Prompt	WO	Photo
<input type="checkbox"/> <input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> <input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> <input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Add Another Row](#)

SAVE
CANCEL

9. Once you have entered all of your inspection questions, continue to the **Schedule** tab to activate the inspection.

Scheduling an Inspection

Once the inspection template has been created you can schedule the inspection to fire immediately or on a predetermined frequency. This section describes how to schedule an inspection.

To schedule an inspection:

1. To schedule a previously created inspection template click **Go To → Inspections → Inspections Template Manager**.
2. Select the name of the template, and then click **Schedule Inspection**.

Note: To schedule a newly created inspection select the 'Schedule tab' after configuring questions.

The screenshot shows the 'Schedule' form with the following elements:

- Schedule** section with radio buttons for **Single Day** and **Recurrence**. A red arrow points to the **Recurrence** option.
- FREQUENCY** dropdown menu with options: Define Custom Recurrence, Annually, Semi Annually, Tri Annually, Quarterly, Monthly, Weekly, Every Day, Weekdays Only.
- INSPECTION NAME** field containing 'Property Inspection'.
- DAYS TO COMPLETE** field containing '1'.
- ASSIGNEE** dropdown menu with the text 'Select an Assignee'.
- ACTIVATE INSPECTION** button at the bottom right, with a red arrow pointing to it.

3. Select if you wish to activate the inspection for a Single Day or if you wish to schedule it on a recurring frequency. For a scheduled inspection, select an occurrence, the start date, frequency, and end date.

Note: If you wish to activate the inspection for the current day select the 'Single Day' option to select the day as inspections can only be scheduled for a future date.

4. (Optional) Edit the inspection name that will appear when generated.
5. Insert a target number of days to complete once the inspection is generated. The number of days to complete will generate a due date for each inspection once active.
6. Select the **Building(s)** and **Assignee** for the inspection(s).
Note: To activate to multiple properties add assignments by clicking the (+) icon.
7. Click **Activate Inspection**.

Locating an Inspection

This section describes how to locate an inspection from the desktop version.

To locate an inspection:

1. Click **GoTo → Inspections → Inspections Dashboard**.

Note: The Inspections Dashboard defaults to show active inspections which have not yet been completed but have already met their scheduled date.

STATUS	REQUEST	INSPECTION NAME	BUILDING	ASSIGNEE	TYPE	START	DUE
	1708239237	Vacant Unit Condition Report	Holden Tower East	Anna Nance		09/18/2019	10/18/2019
	1814384812	Monthly Property Inspection	Holden Tower East	Joe Silverman		12/16/2019	01/15/2020
	1814385900	Electrical Safety Checklist	Holden Tower North	Ben Carey		12/16/2019	01/15/2020
	1814397256	Quarterly Inspection	Holden Tower East	Ben Carey		12/16/2019	01/15/2020

2. Click **SEARCH** box to specify your search parameters.

- (Optional) Enter the Inspection Name.
- Select the **Status(es)** you wish to view.

Note: To view inspections which have not yet met their scheduled date select 'Scheduled.' To view inspections which have been completed select 'Completed' and/or 'Closed.' To view active inspections which have not met their target date select 'Overdue'.

- (Optional) Select Inspection Type.
- Select the **Building(s)** you wish to view.
- (Optional) Select the assignee of the inspection.

3. Click **Search** to view results.

4. Select the desired inspection from the dashboard by selecting the inspection **Request** number. You will be brought directly into the inspection record.

Note: Scheduled inspections which have not met their scheduled date are not given a request number and will display a 'Scheduled' hyperlink to view / edit the scheduled inspection.

Completing an Inspection

This section describes how to complete an inspection from the desktop version.

To complete an inspection:

1. Click **Go To** → **Inspections** → **Inspections Dashboard**.
2. If you are unable to locate your desired inspection, use the **SEARCH** button and/or column filters to narrow down your search.
3. Select an inspection via the **Request** column.
4. Provide answers to the required questions, create any work orders, or attach any documents as required to complete the inspection.
*Note: You may save an inspection at any point by clicking the **SAVE** located within each inspection section.*

#1814397256 - Quarterly Inspection
Holden Tower East

ASSIGNED TO:
Ben Carey

STATUS: Not Started
DUE DATE: 01/15/2020
DATE OF INSPECTION: Not yet complete
Labor Hours: 0.0 Hours

BUILDING: Holden Tower East
BUILDING ADDRESS: 123 Main st. MA 02143

REASSIGN CHANGE STATUS SHARE PRINT

Questions 6

Building Exterior

1. What is the condition of the exterior facade of the building?: *

Good
 Fair
 Bad

2. Are all exterior lights functional?: *

Yes
 No

SAVE

Building Interior

Uncategorized

MARK AS COMPLETE

5. (Optional) Add any Labor or Materials tracked on this inspection in the Labor and Materials section

6. (Optional) Attach any additional files in the Files section of the inspection.

7. Click **Mark as Complete** to complete the inspection.

Canceling an Existing Inspection

This section describes how to cancel an existing inspection from the desktop version. To cancel an inspection:

1. Click **Go To → Inspections → Inspections Dashboard**.
2. Use the **SEARCH** button and/or dashboard column filters to locate the inspection you want to cancel.
3. Click the inspection **Request** number.
4. Click **Change Status**.
5. Select the **Cancelled** status and click **SAVE**.

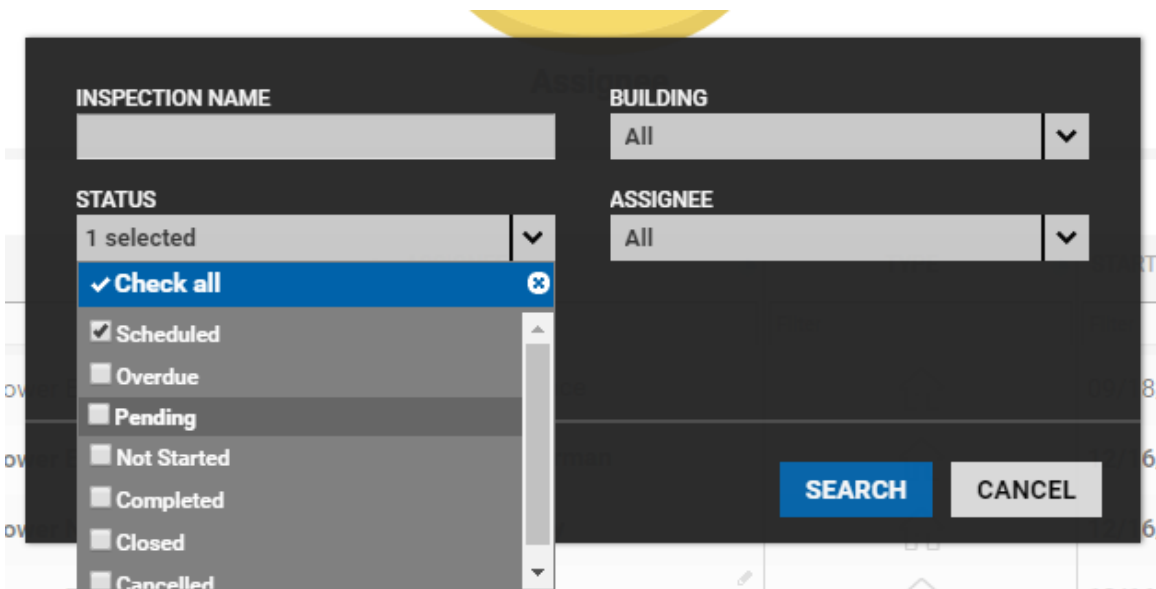
The screenshot displays the 'Change Status' dialog box for inspection #1814397256. The dialog box is open, showing a 'STATUS' dropdown menu with 'Cancelled' selected. A red arrow points to the 'Cancelled' option. Below the dropdown is a 'COMMENT' text area. At the bottom of the dialog, there are three buttons: 'SAVE', 'SAVE AND ADVANCE', and 'CANCEL'. A red arrow points to the 'SAVE' button. The background shows the inspection details for 'Holden Tower East' and a list of questions.

Editing or Canceling Future Instances of a Scheduled Inspection

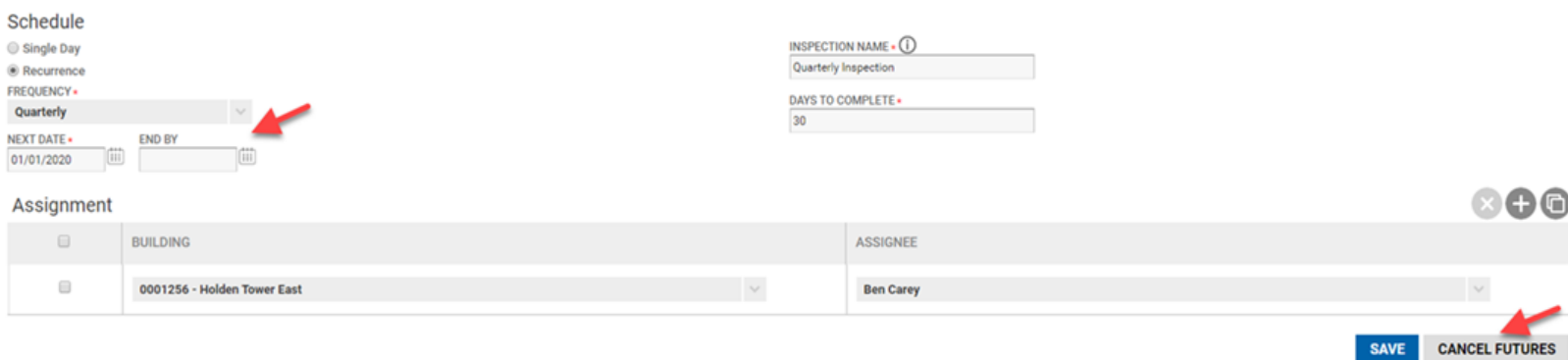
This section describes how to cancel a future instances of a scheduled inspection from the desktop version. To cancel or edit an inspection:

1. Click **GoTo → Inspections → Inspections Dashboard**.
2. Click **SEARCH** box to specify your search parameters.

Note: To view inspections which have not yet met their scheduled date select 'Scheduled.'



3. From the inspections dashboard select the '**Scheduled**' link for the desired inspection.
4. Within the Inspection Template Manager page for the scheduled inspection select the '**Schedule**' Tab.
5. To edit the frequency select the '**Frequency**' drop down or edit the '**Next Date**'.
6. To cancel all future instances of the inspection select **Cancel Futures**.



Dynamic Building Inspections

A Dynamic Building Inspection is an inspection that takes into consideration your building's layout. With a single template, you can setup a unique set of inspection questions and responses based on room type and occupancy. This section describes how to create your room types, setup your stacking plan, and then define each room type's inspection questions.

Managing Room Types

The first step to creating a Dynamic Inspection is to define your building's room types and layout, which is commonly referred to as the Stacking Plan.

To build out the Room Type list:

1. Click **Admin** → **System Labels**.
2. Select **Room Types** from the list on the left side.
3. Click Add.
4. Enter the room type **Name**, and click **Save**.

Building a Stacking Plan

After you have established your Room Types, you need to setup your building's stacking plan. This section describes the process of building a stacking plan.

To build your building's Stacking Plan:

1. Click **Admin** → **Building Settings** → **Space Management**.
2. Select a building from the building drop down.
3. Build out your building's Stacking Plan.

*Note: For information regarding how to setup your stacking plan, see the **Space Management User Guide**.*

Creating a Dynamic Building Inspection Template

After your room types and Stacking Plan have been configured, you need to create a Dynamic Building Inspection Template. This type of template allows you to create a unique set of questions for each room type and occupancy status.

To create a dynamic building inspection template:

1. Click **Go To → Inspections → Template Manager**.
2. Click **Create Template**.
3. Enter a name for the template, using the **Name** field.
4. Select **Dynamic Property Inspection** from the Type of Inspection drop down.
5. (Optional) Use the Custom Header Questions field to enter additional questions.
6. Select the type of suites you're looking to create the inspection for in the **Dynamic Inspection Options** drop down.

Note: You can select from All Tenant Suites, Occupied Tenant Suites Only, or Vacant Tenant Suites Only.

Details

NAME *

TYPE OF INSPECTION *

Dynamic Building Inspection
▼

SCORED INSPECTION *

Yes
 No

Header Options

Include Property Address

CUSTOM HEADER QUESTIONS

DYNAMIC INSPECTION OPTIONS

Inspect All Tenant Suites
▼

Inspect All Tenant Suites

Inspect Occupied Tenant Suites Only

Inspect Vacant Tenant Suites Only

occupied by a single Tenant

IS

You may (optionally) prevent the completion of an Inspection if there are any open associated Work Orders.


Allow Inspection to be completed with open Work Orders.
 Rollover open Work Orders to next scheduled Inspection.
 Prevent completion of Inspection with any open Work Orders.

7. Click the **Questions** tab to continue to the inspection questions.
8. To begin creating questions, click the room type, and select a question format. Questions for a room type will activate to all spaces within the property labeled as the room type when the inspection is activated based on the current stacking plan of the property.

Note: If you do not want to inspect a particular room type, leave the questions in that section blank.

Questions MANAGE ROOM TYPES SETUP STACK PLAN

Common Area +

1  Is the common area clean and accessible?
 Yes
 No
 N/A

Tenant Suite + v

Tenant Common Area + v

9. When you have finished adding questions for each room type, click the **Schedule** tab.
 10. Select if you wish to activate the inspection for a Single Day or if you wish to schedule it on a recurring frequency. For a scheduled inspection, select an occurrence, the start date, frequency, and end date.
- Note: If you wish to activate the inspection for the current day select the 'Single Day' option to select the day as inspections can only be scheduled for a future date.*
11. (Optional) Edit the inspection name that will appear when generated.
 12. Insert a target number of days to complete once the inspection is generated. The number of days to complete will generate a due date for each inspection once active.
 13. Select the **Building(s)** and **Assignee** for the inspection(s).
- Note: To activate to multiple properties add assignments by clicking the (+) icon.*
14. Click **Activate Inspection**.

Scored Inspections

Scored inspections allow you to assign a score to each inspection question based upon a pre-determined range. The score of each question is then tallied up, and if the total amount doesn't meet or exceed the minimum threshold, an alert is sent to a designated recipient.

Creating a Scored Inspection

This section describes the process of creating a Scored Inspection. To create a Scored Inspection:

1. Click **Go To → Inspections → Template Manager.**
2. Click **Create Template.**
3. Within the **Scored Inspection** area, click **Yes.**
4. (Optional) From the Send Email To field, select a recipient to receive an escalation if the minimum score target is not achieved.

Details

NAME *

TYPE OF INSPECTION *

SCORED INSPECTION *
 Yes No

Send an email alert if the score for this Inspection is below target upon completion

MINIMUM SCORE TARGET *
 %

SEND EMAIL TO *
 7 Item(s) Selected [Select All](#)

Type to filter

- Kathleen Andrews
- Sarah Ballard
- Ben Carey
- KYLE COITEST
- Amanda Garcia-Waters
- Alexander Moore
- Anna Nance
- Joe Silverman
- Elizabeth Test
- Bachel VanHoven

Header Options

Include Property Address

CUSTOM HEADER QUESTIONS

Inspection Completion Options

You may (optionally) prevent the completion of an Inspection if there are any open associated Work Orders.

Allow Inspection to be completed with open Work Orders.

Rollover open Work Orders to next scheduled Inspection.

Prevent completion of Inspection with any open Work Orders.

SAVE AND CONTINUE

5. Create your inspection template, and assign score points to the multiple choice answers.

Customize Your Question and Responses

Option-based Questions
 Multiple Answer Checkboxes
Single Answer Radio Buttons
 Single Answer Dropdown

Other Questions
 Scan Response Input
 Photo Response Input
 Numeric Response Input
 Single-line Response Input
 Textbox Response Input

ENTER YOUR QUESTION *

Review the exterior of the building and select the condition that most accurately matches the description.

Require Response Require Photo Allow N/A

Responses	Optional Prompt	Score
⌵ ⊗ Excellent		3
⌴ ⊗ Fair		2
⌶ ⊗ Poor		1

[Add Another Row](#)

6. When you are finished entering questions, click **Schedule**.

7. Select if you wish to activate the inspection for a Single Day or if you wish to schedule it on a recurring frequency. For a scheduled inspection, select an occurrence, the start date, frequency, and end date.

Note: If you wish to activate the inspection for the current day select the 'Single Day' option to select the day as inspections can only be scheduled for a future date.

8. (Optional) Edit the inspection name that will appear when generated.

9. Insert a target number of days to complete once the inspection is generated. The number of days to complete will generate a due date for each inspection once active.

10. Select the **Building(s)** and **Assignee** for the inspection(s).

Note: To activate to multiple properties add assignments by clicking the (+) icon.

11. Click **Activate Inspection**.

Mobile Inspections

Activating a New Inspection

This section describes how to activate a new inspection from an existing template from your mobile device.


To activate an inspection:

1. Click **Inspections > Create Inspection**.
2. Select a **TEMPLATE**, provide an **INSPECTION NAME**, select a **BUILDING**, an **ASSIGNEE**, and click **Create Inspection**.

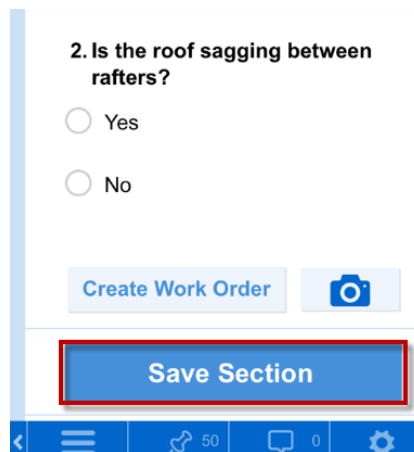
Completing Inspection Questions

After an inspection has been activated the inspection's questions appear below the details within the Questions section. This section describes how to complete the inspection questions.

To complete the inspection questions:

1. Click **Inspections**.
2. Select an inspection from the list.
3. Scroll down and click on the **Questions** section.
Note: If question sections are present, click the section to view that sections questions.
4. (Optional) If you want to create a work order associated to the inspection, click Create Work Order.
5. (Optional) If you want to add a picture to a inspection question, click the  icon.
6. Click **Save Section** once you are finished with a section.

Note: Question responses do not auto-save on mobile. Please ensure you save each section.



7. Once all of the inspection questions have been completed, click **Complete Inspection**.



Adding a Photo to an Inspection

It is common for photos to be included in an inspection. Depending upon how the inspection was created, you may be required to use a photo to answer a question, or add a photo as a supplement to your text based answer. This section describes the process of adding photos to your inspection.

To add a photo to a specific question in an inspection:

1. Click **Inspections**.
2. Select an inspection from the list.
3. Scroll down and click on the **Questions** section.

Note: If question sections are present, click the section to view that sections questions.

4. Locate the question you want to add a photo to and click the  icon.
5. Click either **Take Camera Photo** to use your device's integrated camera, or click **Add From Gallery** to access your device's photo gallery.
6. (Optional) To draw on the photo, click , select a color, and use your finger to draw on the photo.
7. Click **Use**.
8. (Optional) Enter a comment to accompany the photo.
9. Click **Save** or **Add More** to add additional photos.

To add a photo into the Files section of an inspection:

1. Click **Inspections**.
2. Select an inspection from the list.
3. Scroll down and click on the **Files** section.
4. Click **Add Photo**.
5. Click either **Take Camera Photo** to use your device's integrated camera, or click **Add From Gallery** to access your device's photo gallery.
6. Click **Use**.
7. Click **Save** or **Add More** to add additional photos.