myInspections 2017 User's Guide

new world ERP - Community Development

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new world
a tyler erp solution

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Contents

Chapter 1

Logging In

When you open the myInspections application on your iPad, you will be greeted by a login dialog:

Fill in the following information:

Host Name. Typically, you will have a Host Name that is defined by the SSL certificate installed on the server that hosts the inspection services.

Username and *Password*.

Date. Review or work with inspections scheduled for this date. The default selection is today's date, but you may change it to see inspections for another date.

Clear Cache on Login. Removes all data from the application and reloads the daily schedule from scratch. If the cache is not cleared, the inspections on today's schedule are not refreshed.

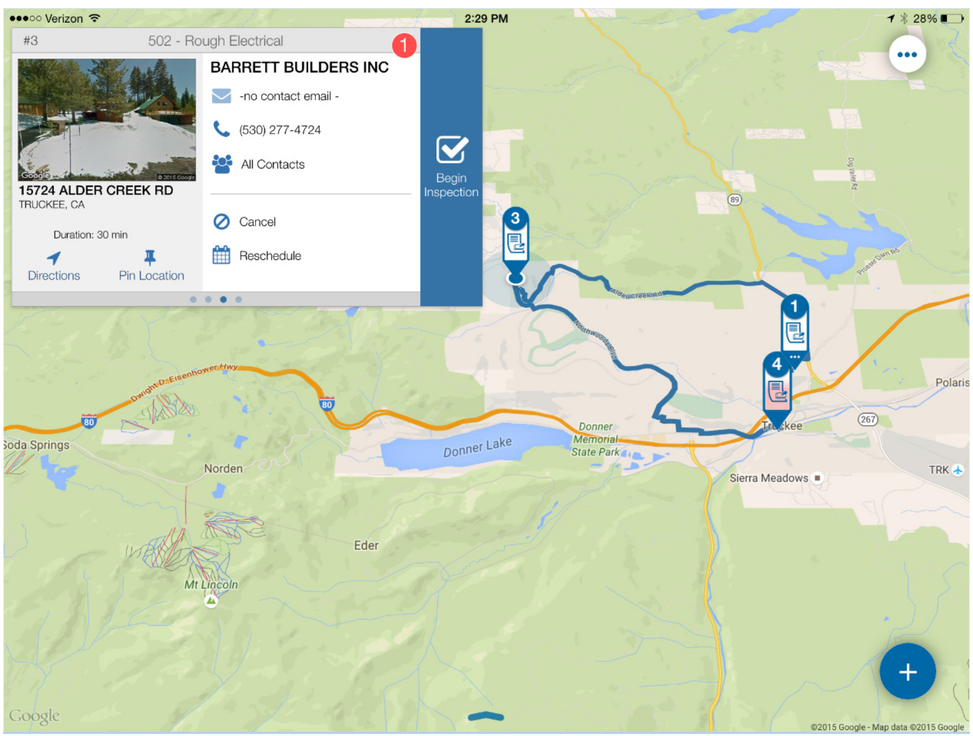
Once you have filled in this information, tap the **Login** button to open the map of inspections (see Chapter 2).

CHAPTER

2

MAP OF INSPECTIONS

To help you keep an eye on the big picture, the first thing you will see when logging into myInspections is a Google map that gives you a complete visual representation of your stops for the day:



Working the Map

Whenever you need to view more real estate to the east, west, north or south, simply touch the display and swipe in the opposite direction. To zoom out for a wide-angle view, pinch the display with two or more fingers; to zoom in for a close-up, spread your fingers apart.

Inspection Markers

Each stop is represented by an inspection marker that contains an image and a number. The image shows the parent type of the inspection to be performed, and the number refers to the order of its occurrence in your day.

The marker of an inspection scheduled for a specific time shows the image of a clock whose hands are positioned to the scheduled time.

Below are the images that appear on the markers and the type of inspection each represents:

Business

Case

License

Parcel

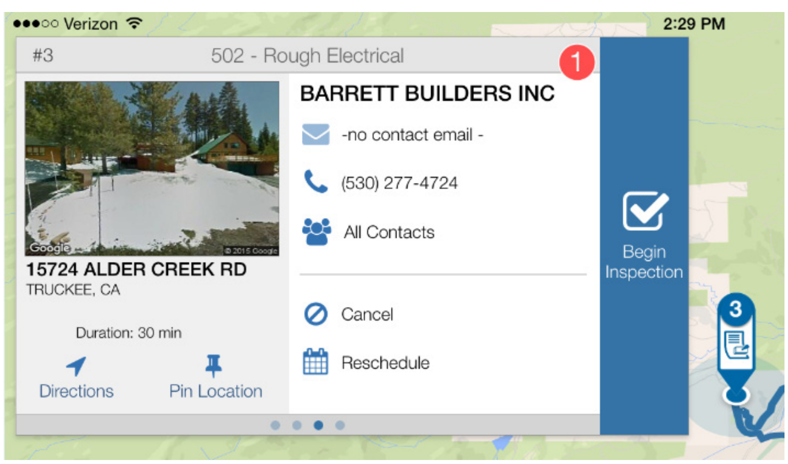
Permit

Residential

When an inspection is added to your schedule, the map refreshes to include the new inspection. Also, whenever your schedule is changed or a report is generated from new world ERP Community Development, you will receive a notification on your iPad.

Inspection Card

To delve into the details of an inspection, tap the corresponding marker. An inspection card will open in the top-left corner of the map display:

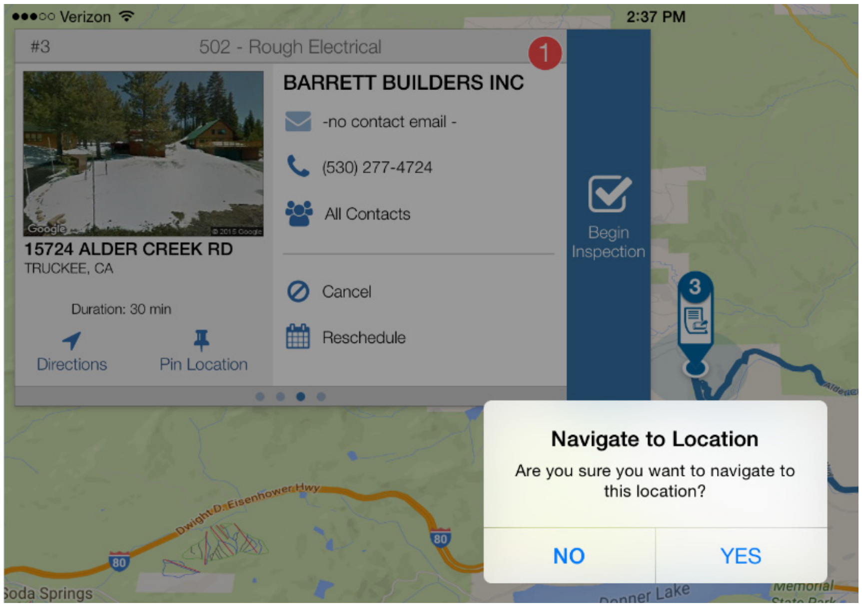


NOTE:

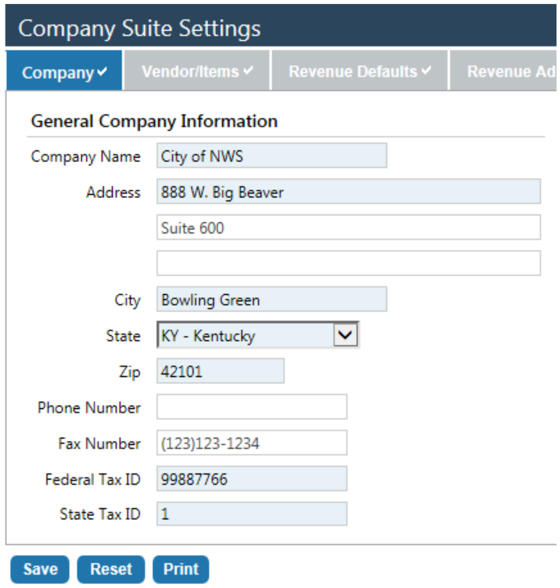
The card for the first inspection in the sequence is displayed by default.

The card gives you the address, time and duration of the inspection; a Google street view of the location; contact information; and the following buttons and options:

- **Directions**: See how to get from where you are to where you need to be:

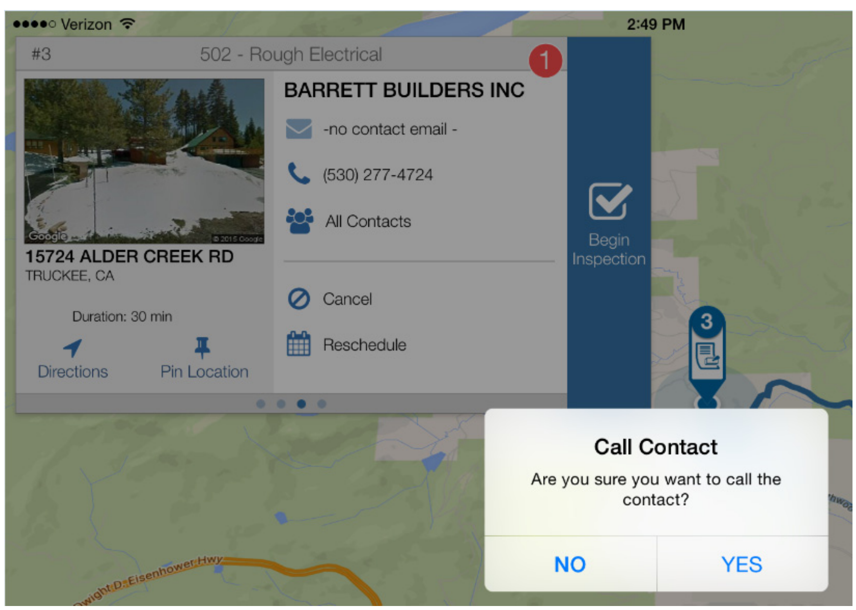


- **Pin Location**: Use this function to store the exact location (X, Y coordinates) of an address that Google Maps does not recognize. Travel to the location, tap the pin icon, and the X, Y coordinates will be updated so that all future inspections are plotted correctly. If Google does not recognize the address, the inspection point will be plotted according to the default address on the **Company** tab of new world ERP Company Suite Settings (Maintenance > new world ERP Suite > System > Company Suite Settings):



- **Email**: Send e-mails to inspection contacts. (If e-mail contacts are not associated with the inspection, “No contact e-mail” will display.) Tap the envelope icon to open an email form.

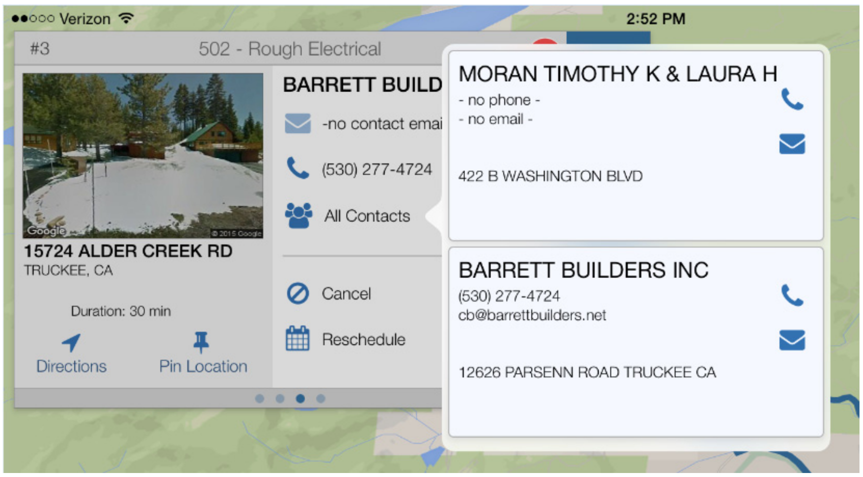
- **Call**: Make calls to inspection contacts. (If phone contacts are not associated with the inspection, “No contact phone” will display.) To make a call, tap the phone icon. A dialog will open to ask for confirmation that you want to call the contact:



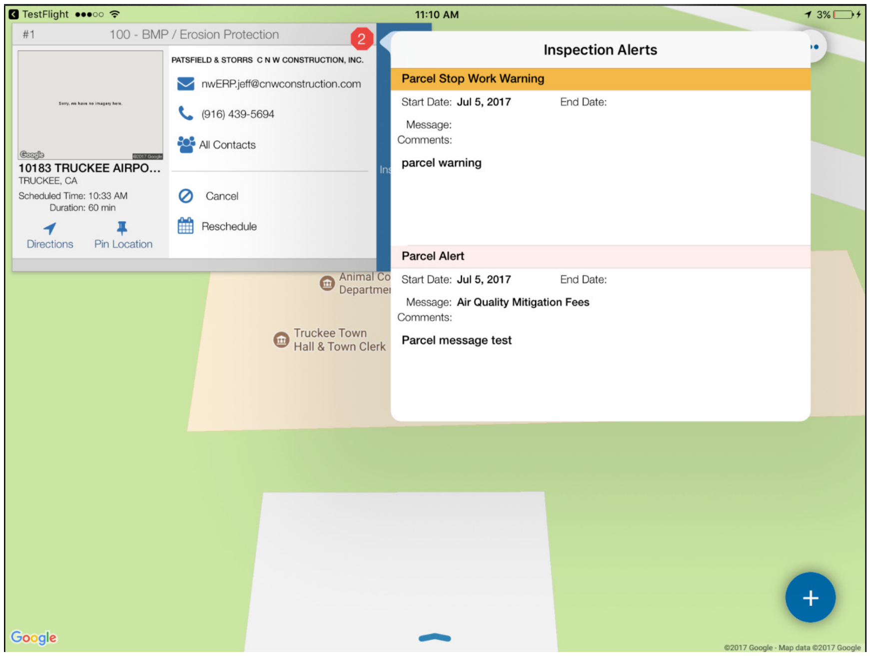
NOTE:

Calls work only if you have an iPhone connected to the iPad. Calls will be made using the iPhone.

- **All Contacts**: View a list of all phone and email contacts from the inspection parent (permit, business, etc.), with icons to let you call or email any:



- **Cancel**: Cancel the appointment.
- **Reschedule**: Reschedule the inspection.
- **Alerts**: If inspection alerts exist, a red circle with a number in it will appear in the top-right corner of the card. The number tells how many alerts exist. Tap the circle to open a pop-up that explains the alerts. Tap outside the pop-up to close it:

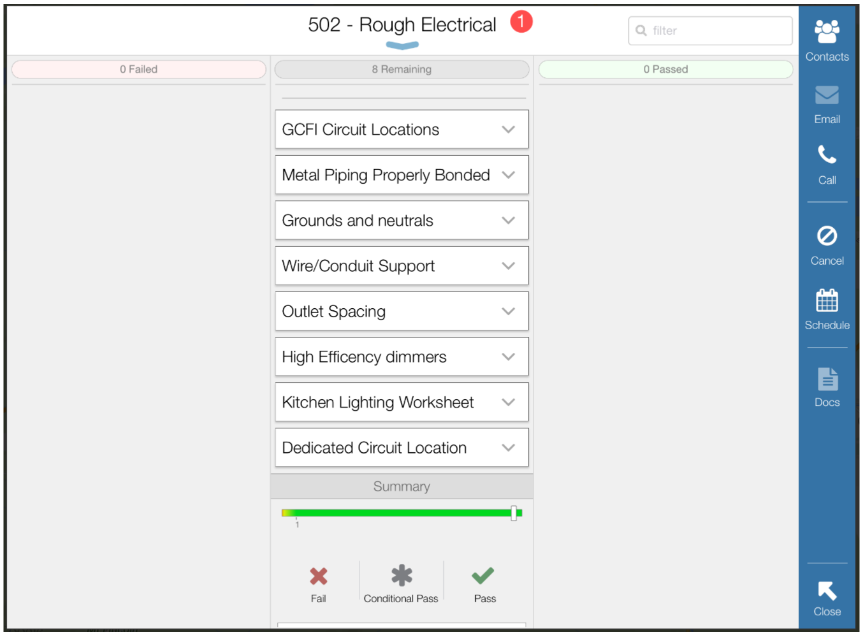


The types of alerts supported are parcel messages, stop works and balances owed.

NOTE:

Alerts also appear on the inspection resulting display. (See Chapter 3.)

- **Begin/Open Inspection**: Conduct the inspection. The button label depends on the status of the inspection: If it has not begun, the button will read, **Begin Inspection**; if it is in progress, the button will read, **Open Inspection**. Tapping the button will take you to the inspection resulting display:

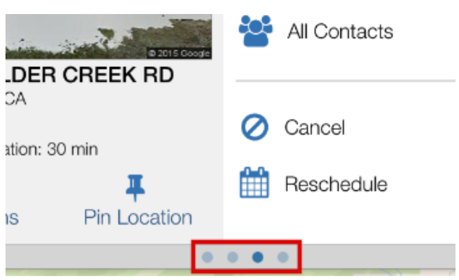


NOTE:

The application saves the begin-inspection time and, when the inspection is completed, the end-inspection time. These times are not shown in myInspections; they are shown in the Community Development Inspections application at headquarters.

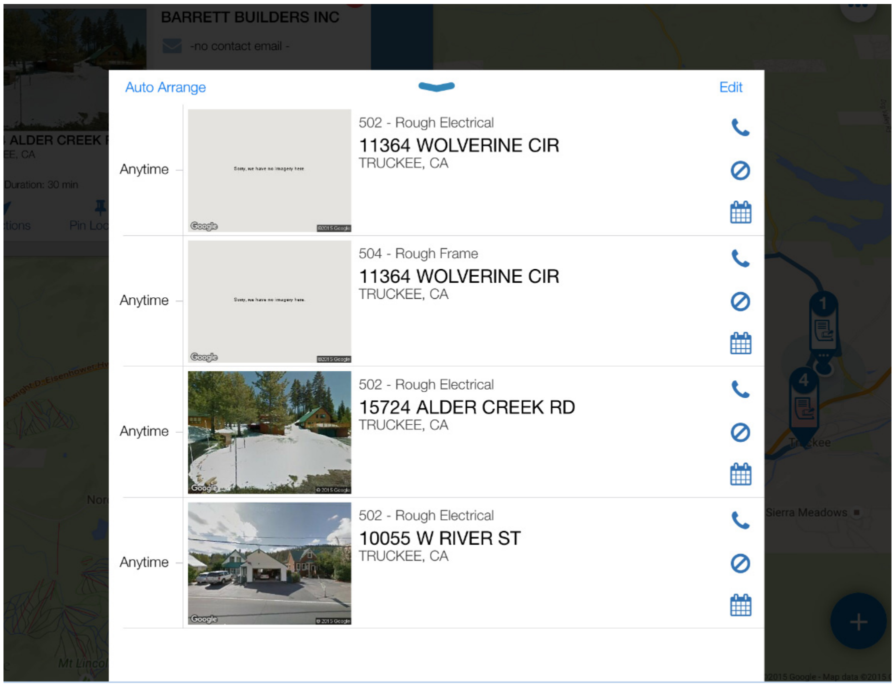
For more on inspection resulting, see Chapter 3.

To see the cards of the next or previous inspections, swipe left or right on the inspection card. The dots at the bottom of the card indicate what card you are viewing in the sequence.



Inspection List View

If you need to work from a list view of the inspections, tap the chevron at the bottom of the map. The list will slide up from the bottom of the display:

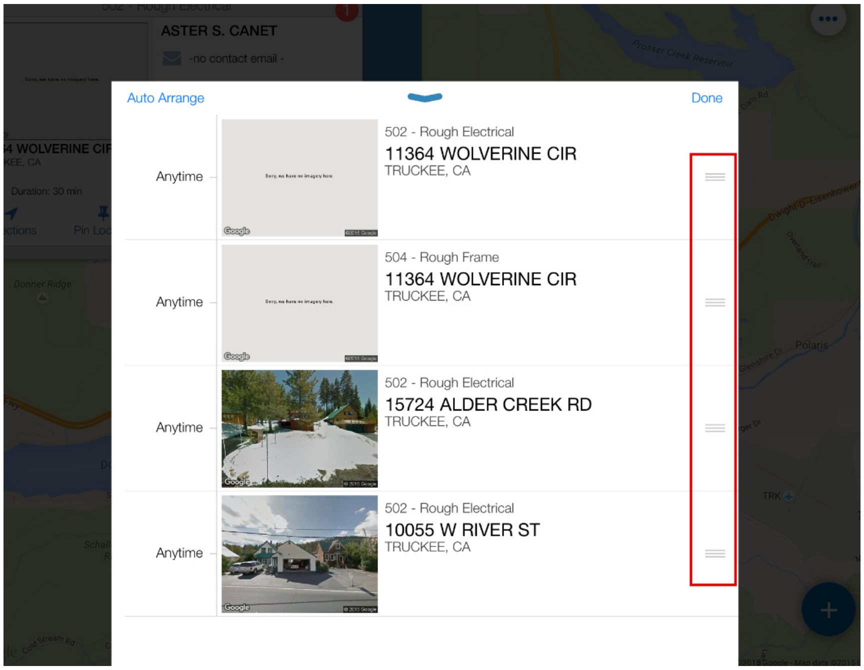


Automated Ordering

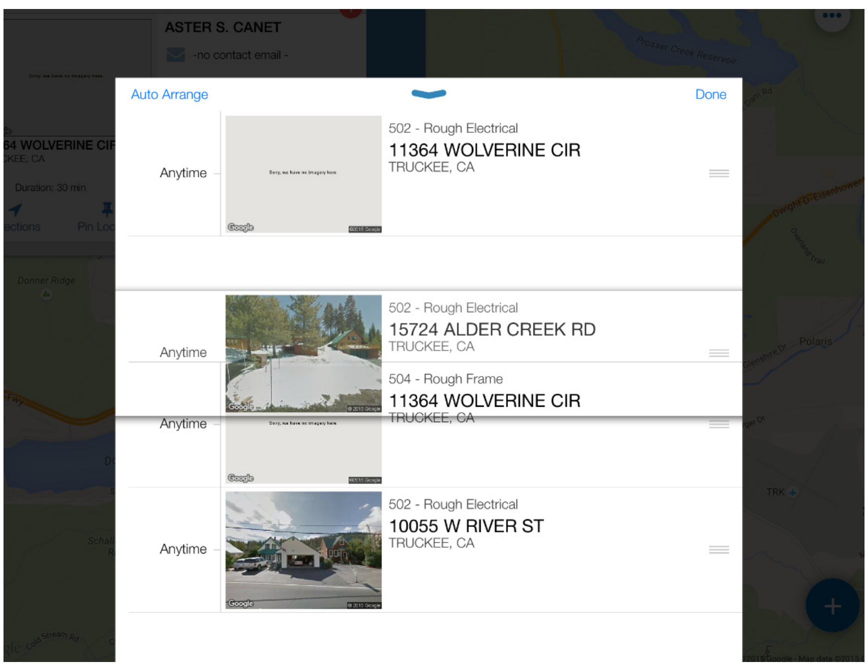
To adjust automated ordering, tap the *Auto Arrange* link in the top-left corner of the list. Inspections will be reordered based on their time configurations. Those with specific time slots will be placed, and the remainder of the list will be ordered by AM/PM preference, followed by non-specified inspections, and fit into the openings.

Manual Ordering

If you want to reorder inspections manually, tap the **Edit** button in the top-right corner of the list. The icons on the far-right of each inspection card will be replaced by a three-bar icon:



Place the tip of a finger on the icon and drag an inspection card to where you want it in the list:

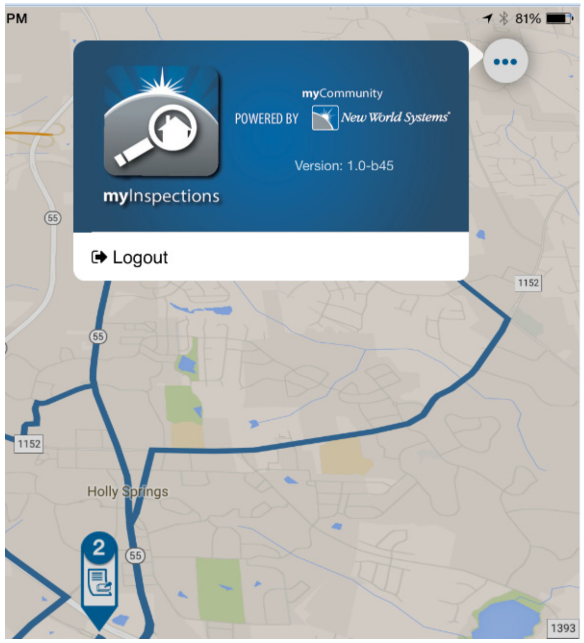


Most of the links and options available on the inspection card are available here, too. (See “Inspection Card” section, p. 2-2.)

To close the inspection list, tap the chevron in the top-center of the list.

Logout and About

To logout or learn the version number of myInspections, tap the ellipsis ••• in the top-right corner of the map:

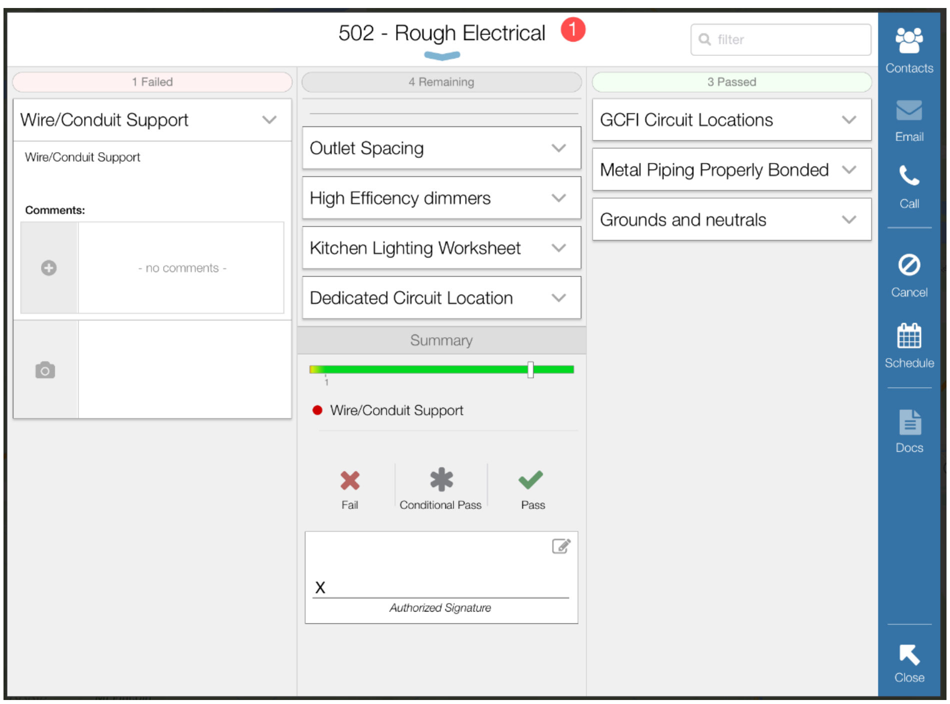


CHAPTER

3

INSPECTION RESULTING

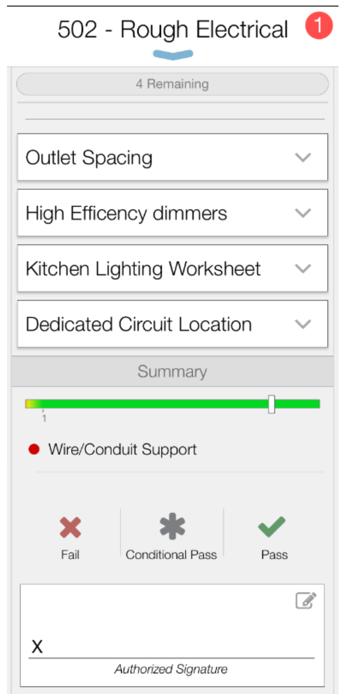
When you tap the **Begin Inspection** or **Open Inspection** button on an inspection card (see Chapter 2), you will get a three-panel display containing the compliance items that apply to the type of inspection you are conducting:



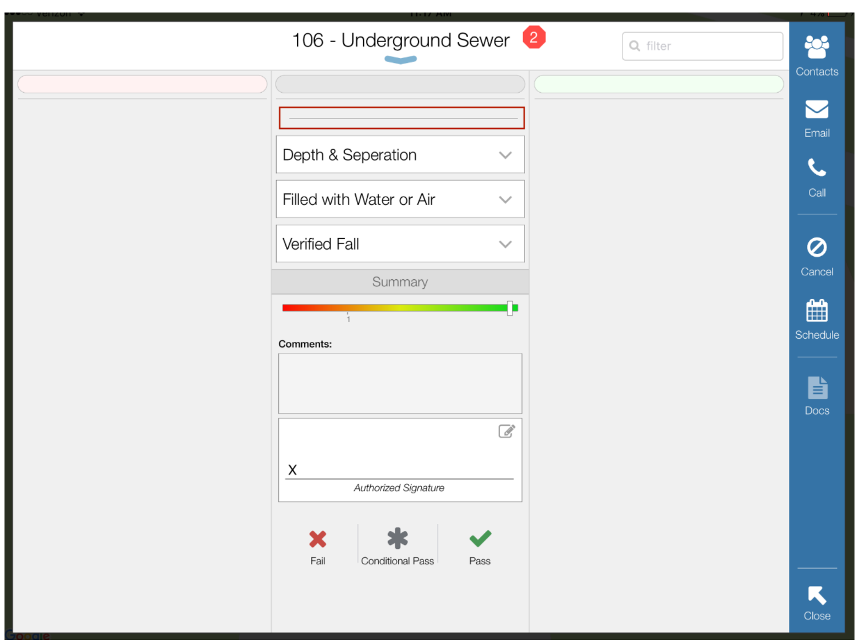
The type of inspection is named at the top of the display. Tap the chevron immediately below the name to pull down the parent details and other inspections and parents (case, permit, license, business) that are tied to the parcel.

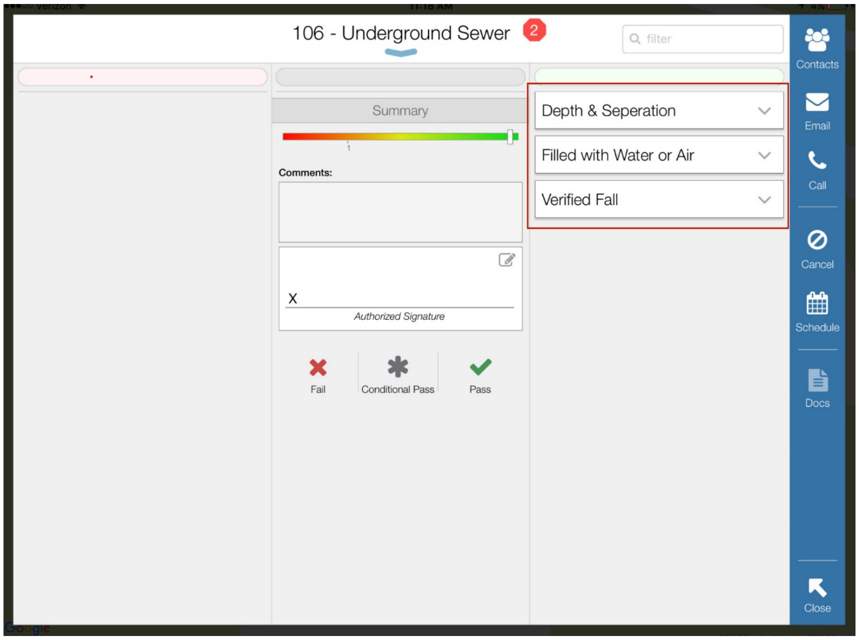
Center Panel

The center panel of the display contains a list of compliance items requiring inspection. The items appear on individual cards and are grouped by category. If an item passes inspection, swipe the item card to the right panel; if it fails, swipe it to the left. The count of remaining items is shown at the top of the center panel:



To pass or fail all compliance items at once, select the gray line at the top of the panel, and drag and drop the compliance items in the appropriate panel:





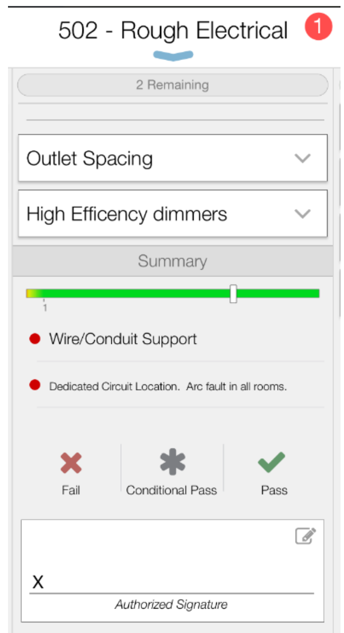
Summary Section

A **Summary** section at the bottom of the center panel provides a live summary of the inspection as it happens, showing failed items and comments from when the inspector completed the inspection; icons for failing ✖, passing conditionally ✱ or passing ✔ the inspection as a whole; and an authorized signature pad for customer acknowledgment.

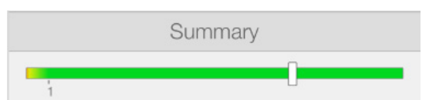
NOTE:

A conditional pass indicates a compliance infraction that was not enough to cause the inspection to fail but that needs to be corrected by the time a follow-up inspection is conducted.

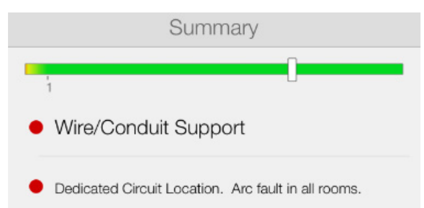
As you complete compliance items, this section expands upward automatically:



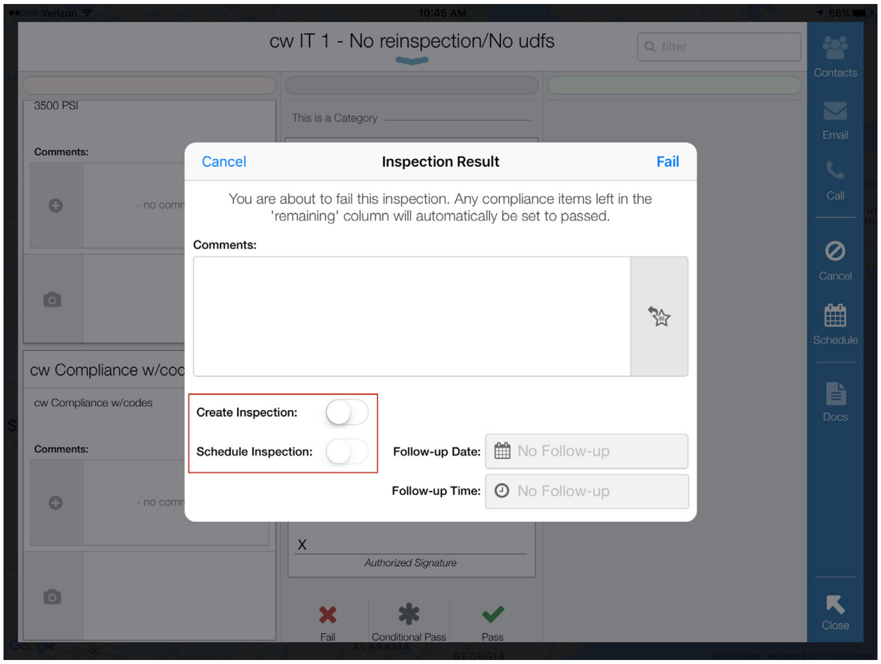
A heat bar also gives you a visual representation of the progress of the inspection, including the number of compliance items that still need to be passed before the inspection may be passed:



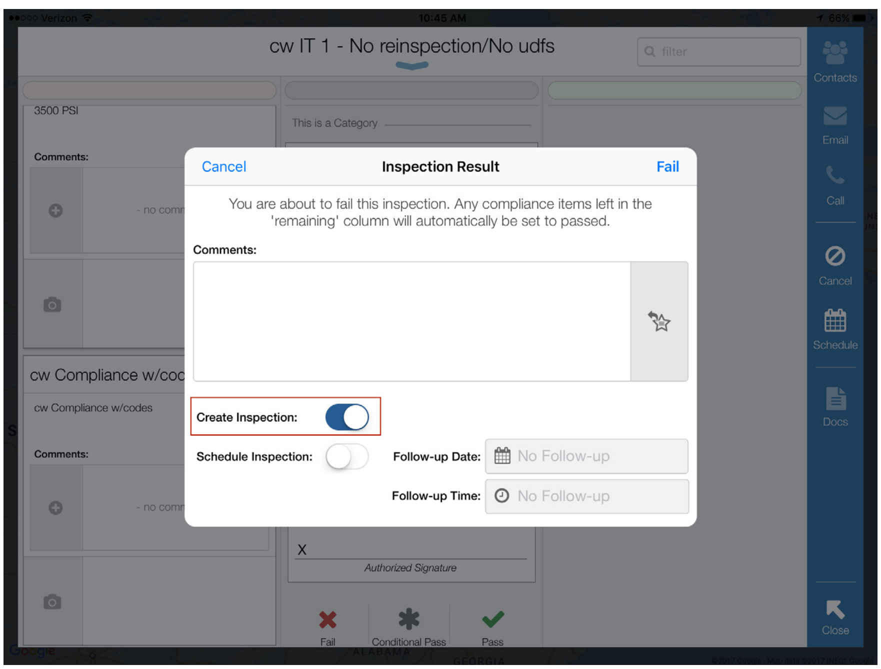
Below the heat bar, the titles of failed items are bulleted in red:



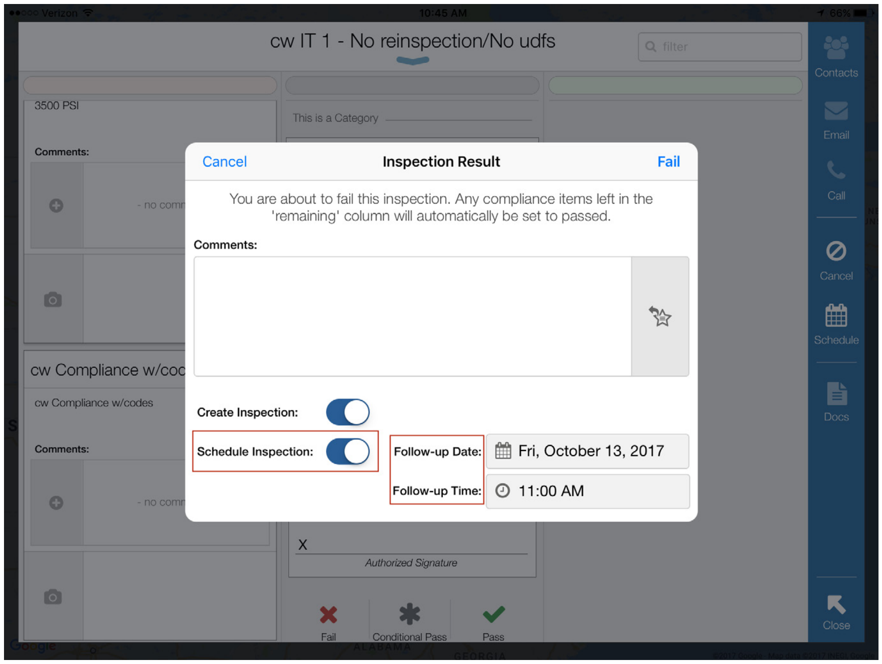
Tapping the **Fail** ✖, **Conditional Pass** ✱ or **Pass** icon ✔ opens an Inspection Result dialog that provides the options to write comments, create a follow-up inspection and schedule a follow-up inspection:



To create an inspection, tap the **Create Inspection** button:



To schedule an inspection, tap the **Schedule Inspection** button. The **Follow-up Date** and **Follow-up Time** fields will be enabled:

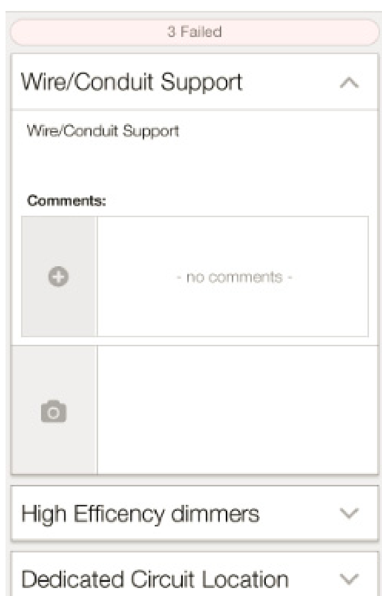


NOTE:

Follow-up inspections are scheduled for the logged-in inspector automatically.

Left Panel

The left panel of the display contains a list of compliance items that have failed the inspection:



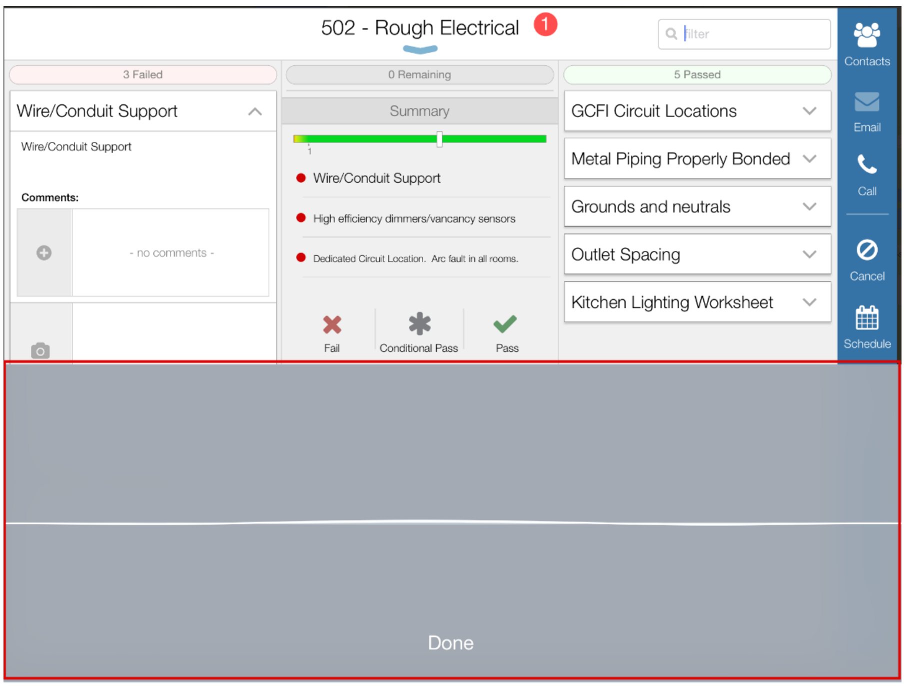
A running total of failed items is shown at the top of the panel. The cards of failed items are expanded by default. They show compliance codes and descriptions and let you add free-form or standard comments, correction instructions and supporting photos.

NOTE:

You may expand a card in any panel by tapping the chevron on the far-right of the card.

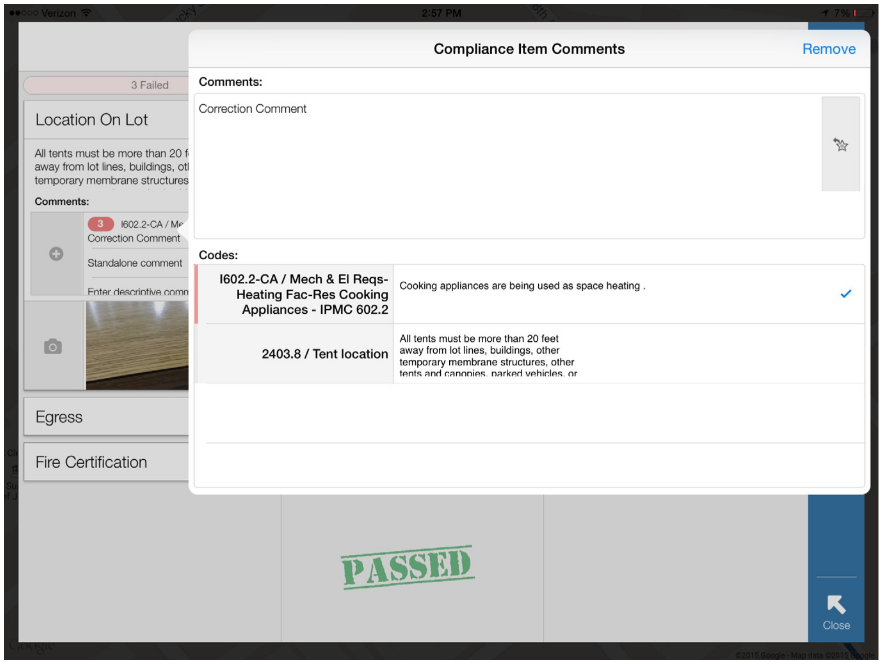
To add comments or correction instructions, tap the comments icon on the expanded card.

If you prefer, you may use Siri to dictate comments. To use SIRI, open comments and click the microphone key at the bottom of the keyboard, left of the space bar. The bottom of the display will become voice activated:



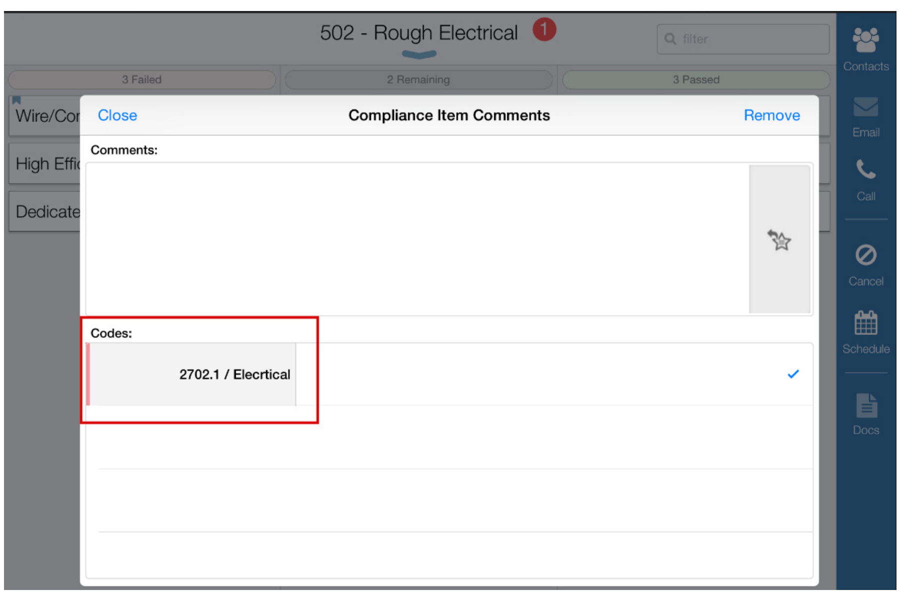
To take a photo related to the compliance item, tap the camera icon on the expanded card.

To view the details of a compliance code, tap the associated comment on the expanded item card. The Compliance Item Comments pop-up will open:

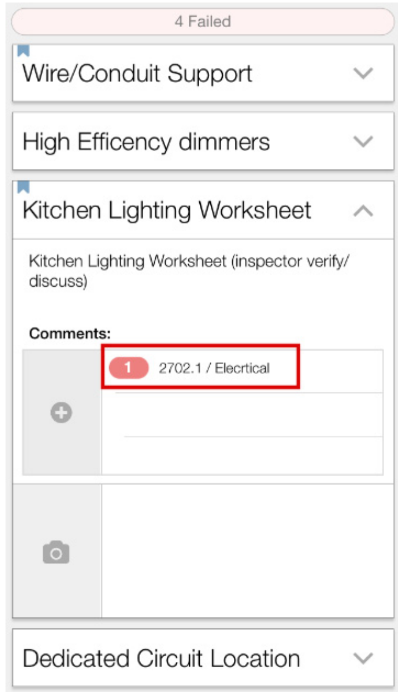


To remove the comment from the item card, tap the **Remove** button in the top-right corner of the pop-up. To close the pop-up without removing the comment, tap outside the pop-up.

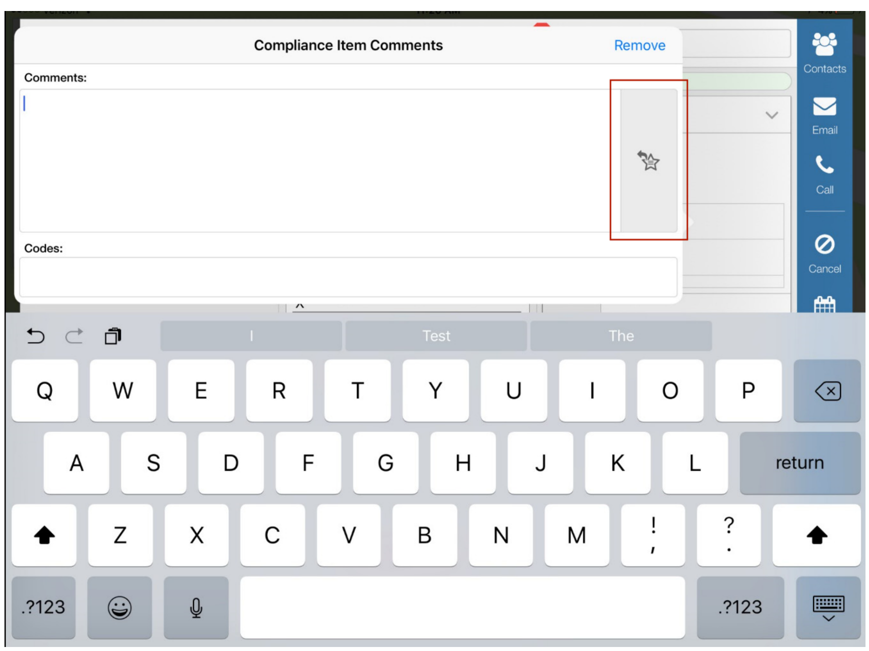
For a compliance item in violation of a code, you may select the code by tapping it before swiping the item card to the left (*Failed*) panel. To show that it has been selected, the left margin of the code will appear in red:



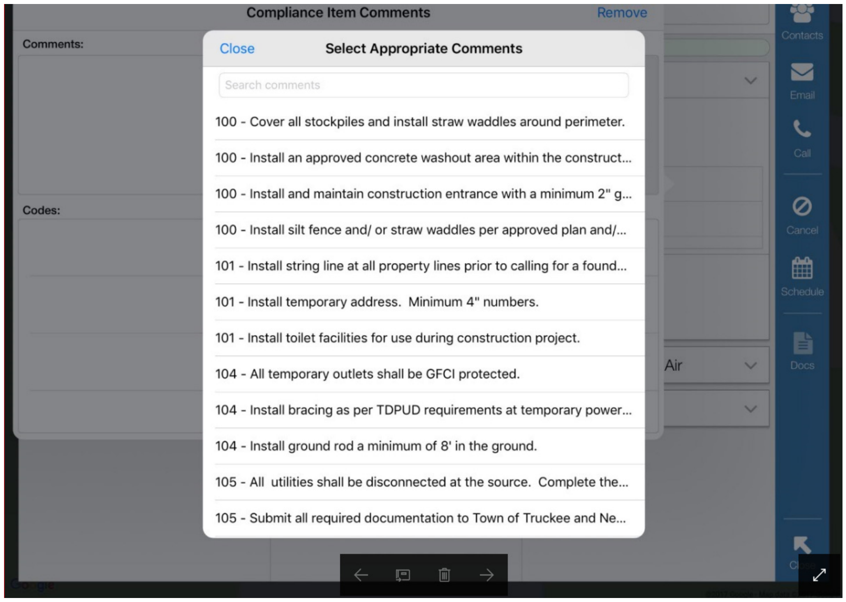
In the left panel, the code and description will appear with the item:



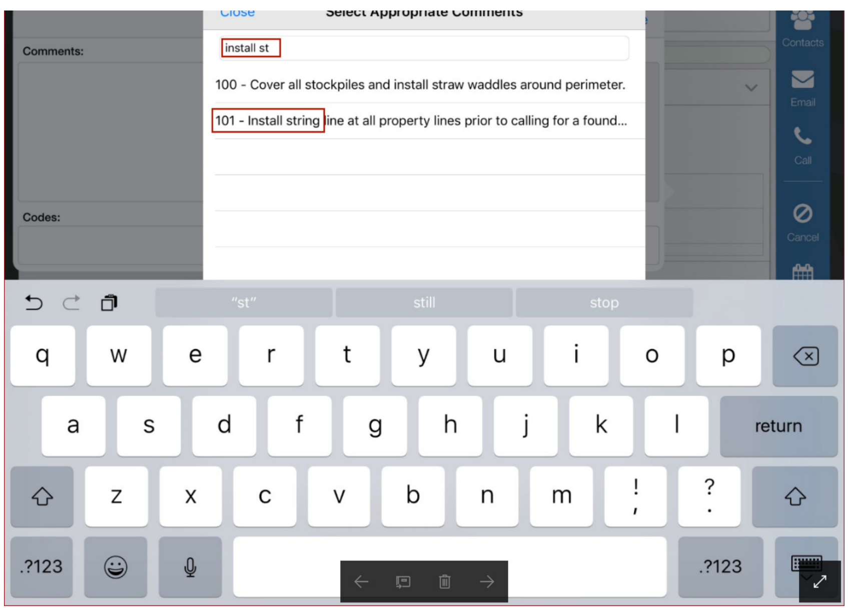
To filter and select comments quickly, click the **Filter** button on the right side of the *Comments* area:



This button opens open the Select Appropriate Comments filter containing a comprehensive list of available comments:

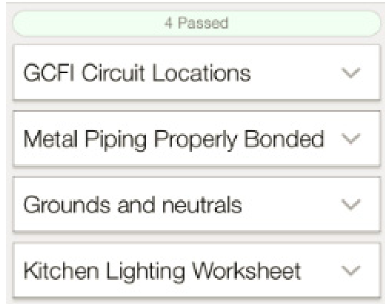


Start typing a comment in the *Search comments* field. As you type, the list refreshes to contain only the comments that most closely match what you type. When you see the comment you want, select it:



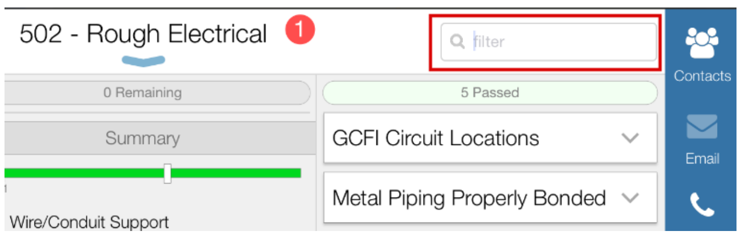
Right Panel

The right panel of the display contains a list of compliance items that have passed the inspection, with a running total shown at the top:



Filter Function

If you need to find a particular compliance item quickly, use the filter field in the top-right corner of the display:



Tap the field to pull up a keyboard at the bottom of the display. (For more on the keyboard, see Chapter 4.) Type directly in the field to find the item you need; for example, typing *Framing* in the field and tapping **Done** will refresh the display to show only the compliance cards that contain the word, *Framing*.

Action Bar

Similar to the inspection card, the blue action bar on the right side of the display gives you the following links and options to aid in processing the inspection as a whole:

- **Contacts**: View a list of all email and phone contacts from the inspection parent (permit, case, license/business), with icons to email or call any. In the parent information, contacts originate from the following:

  Permit

  Permit issued to

  Email contact on the permit

  Contractors associated with the permit

  Related professionals

  Parcel owner

Case

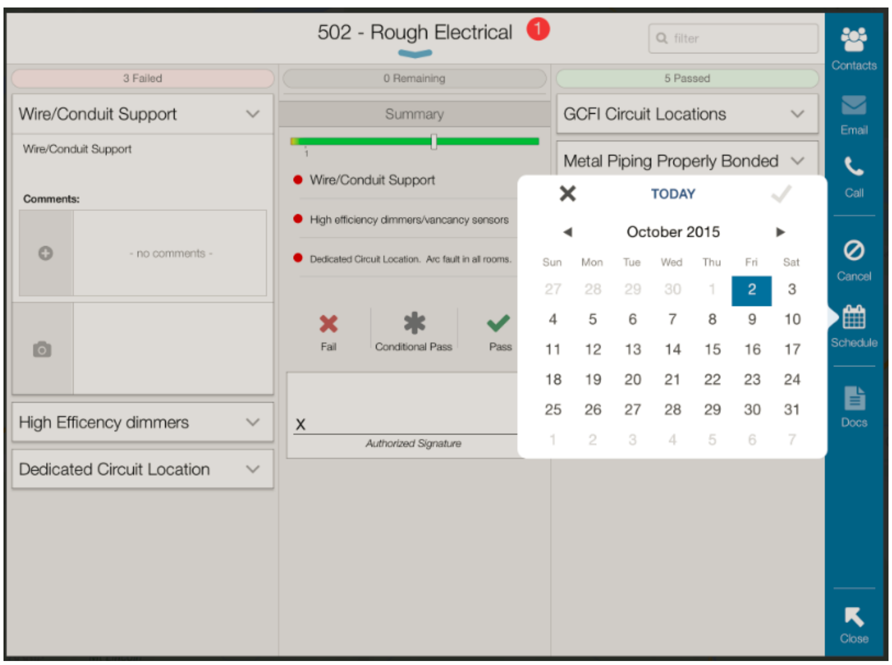
Parcel Owner

Cited party

License/Business

Contacts associated with the licensee

- **Email**: Send and receive e-mails from inspection contacts. Tap the envelope icon to open an e-mail form.
- **Call**: Make and receive calls from inspection contacts. When you tap the phone icon, a dialog will open to ask for confirmation that you want to make the call.
- **Cancel**: Cancel this appointment.
- **Schedule**: Open a calendar for selecting the date to reschedule the inspection:

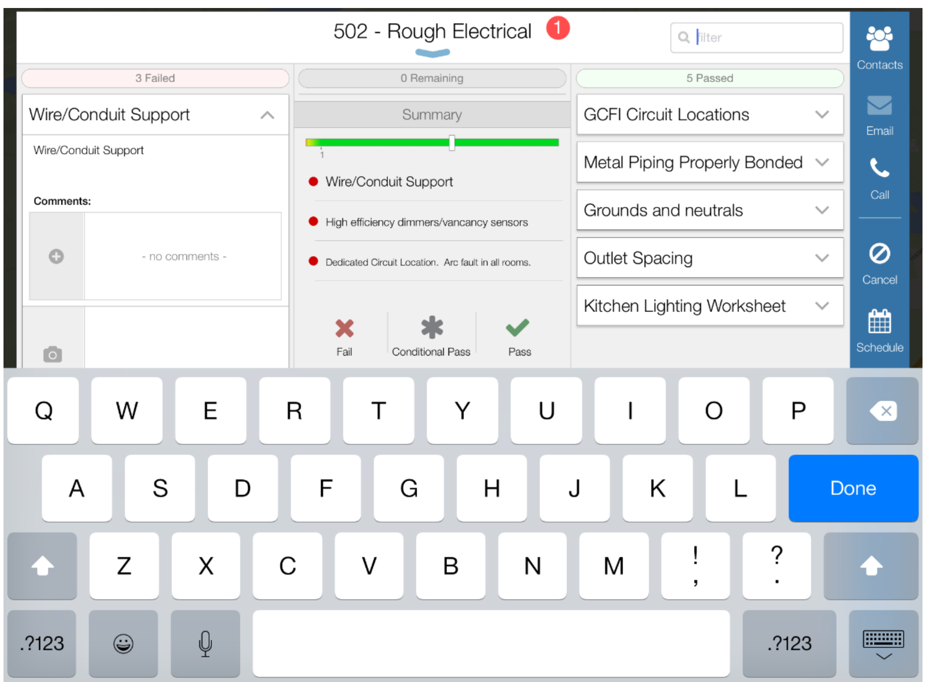


- **Docs**: Print or email the Inspection Result Report and other documents associated with the inspection.
- **Close**: Close the inspection and redisplay your map of inspections.

CHAPTER 4

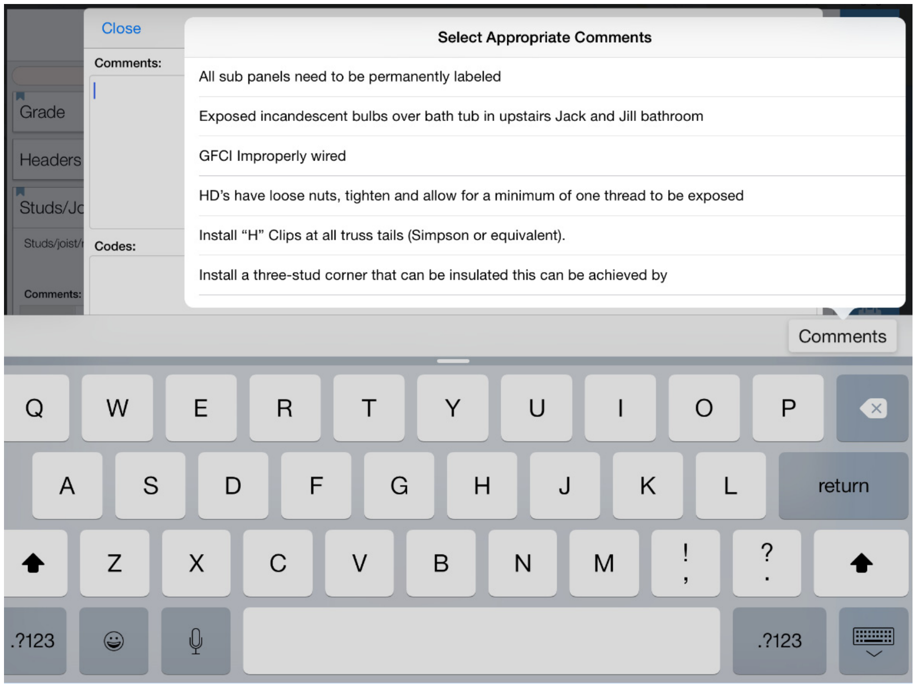
KEYBOARD

A keyboard appears whenever you tap a field or area where you need to type information:



Comments Button

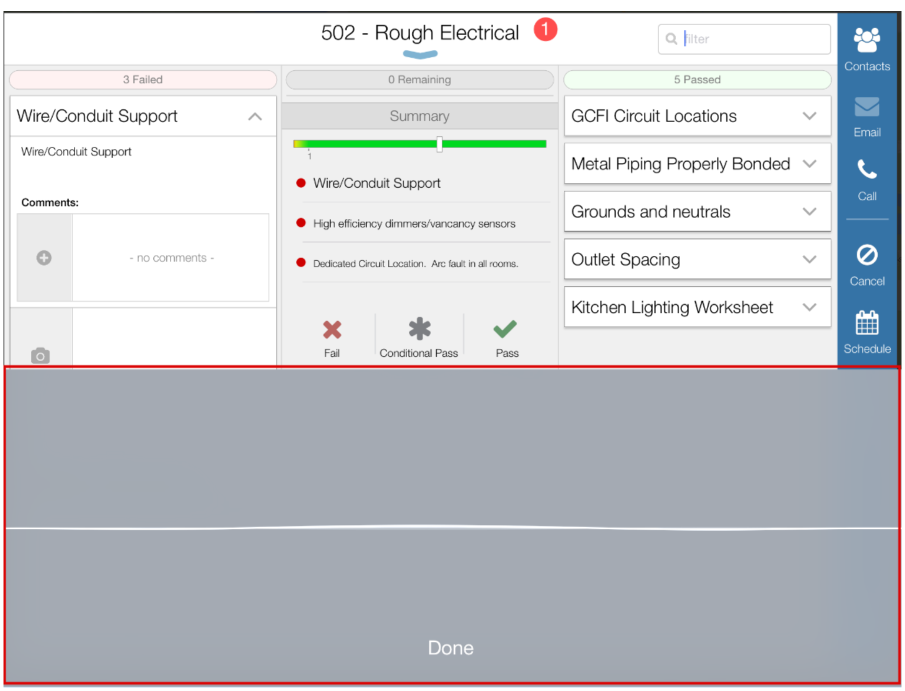
When you tap the Comments section on a compliance item card while completing an inspection, the keyboard that appears also contains a **Comments** button. Tap this button if you want to add commonly used phrases from a standard list to save time:



You may attach as many comments as you need.

Dictate Comments with Siri

If you prefer, you may use Siri to dictate comments. To use SIRI, open comments, and click the microphone key at the bottom of the keyboard, left of the space bar. The bottom of the display will become voice activated:



CHAPTER

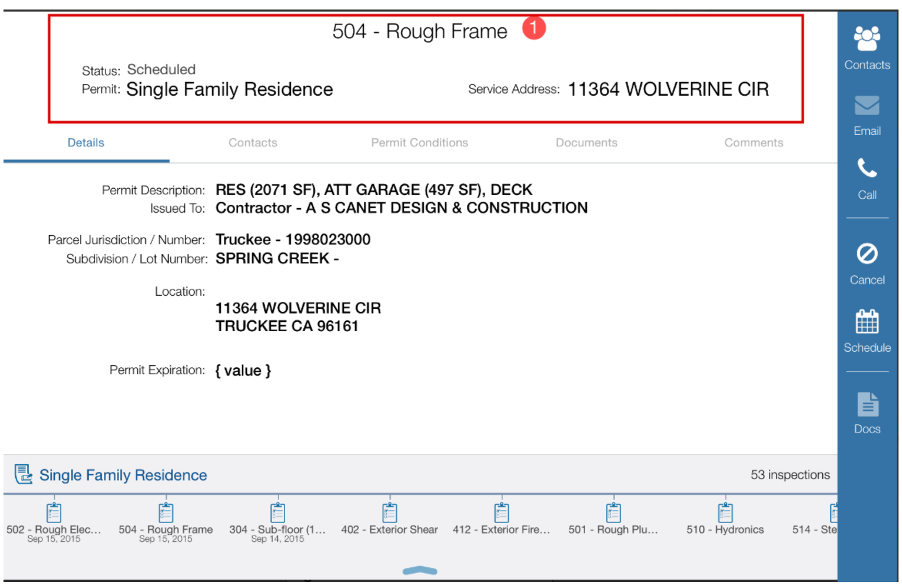
5

PARENT VIEWS AND TIMELINE

Parent Views

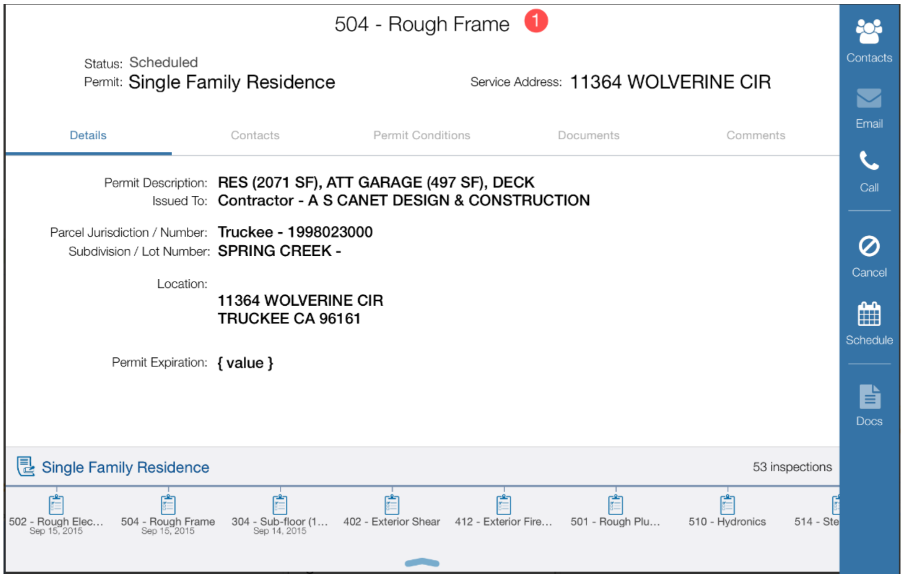
Header

The header of the parent view displays the inspection name, status, permit and service address:



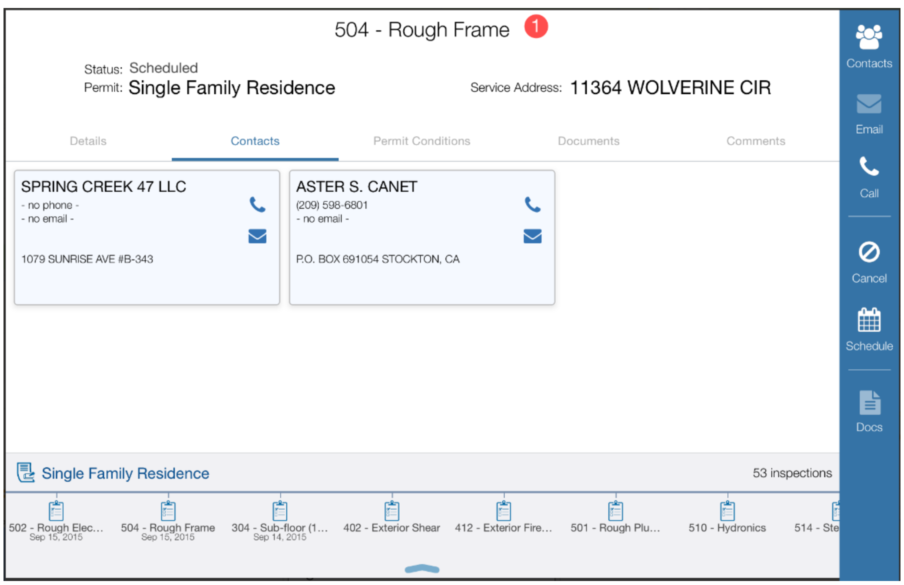
Details

The **Details** view shows the description, parcel and location of the parent item:



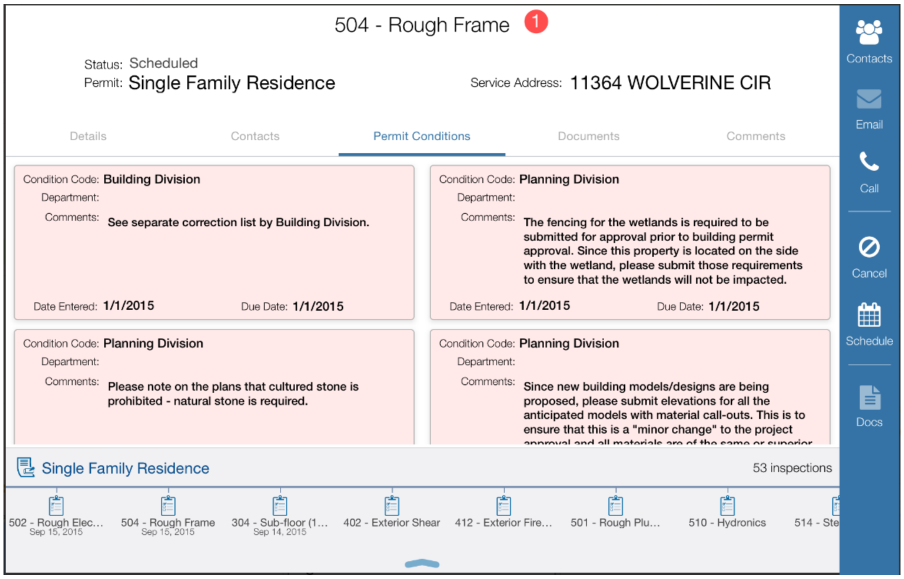
Contacts

The **Contacts** view shows the contact names, phone numbers, email addresses and addresses of the parent item. Call or email by tapping the corresponding icons:



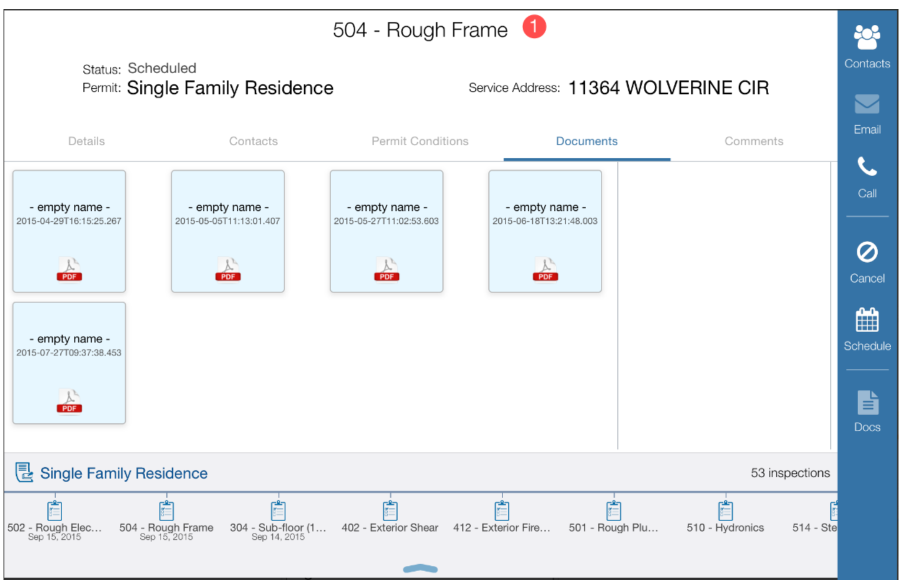
Permit Conditions (only available for permits)

The **Permit Conditions** view shows the conditions that have been applied to the selected permit:



Documents

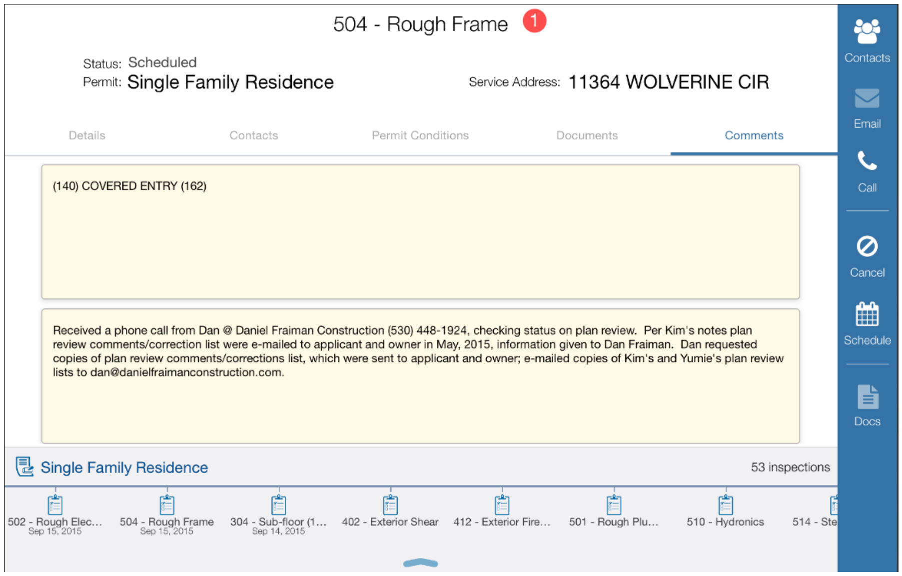
The **Documents** view contains all documents associated with the inspection and with the parent. Although all document types are supported, PDFs are recommended:



When you select a document, its contents will display in the preview pane on the right side of the display.

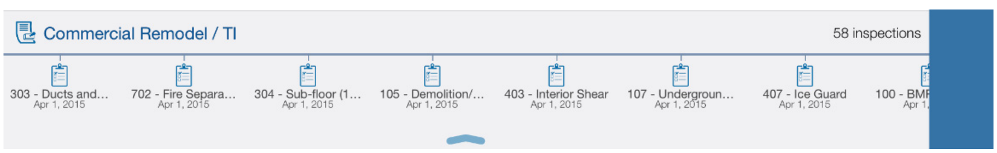
Comments

The **Comments** view shows the comments and notes associated with the parent item:

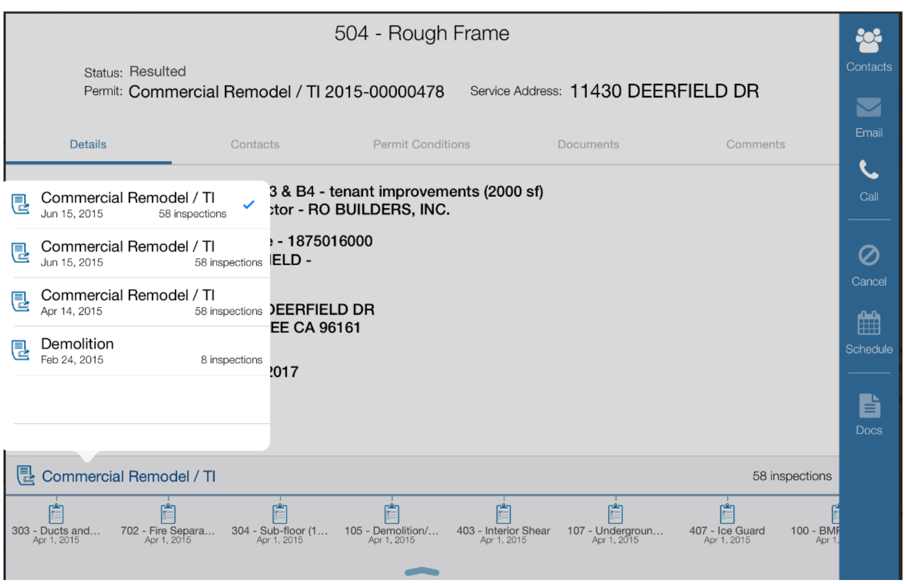


Timeline

The timeline at the bottom of the display gives you a visual representation of the list of all inspections associated with the selected property or parent item:

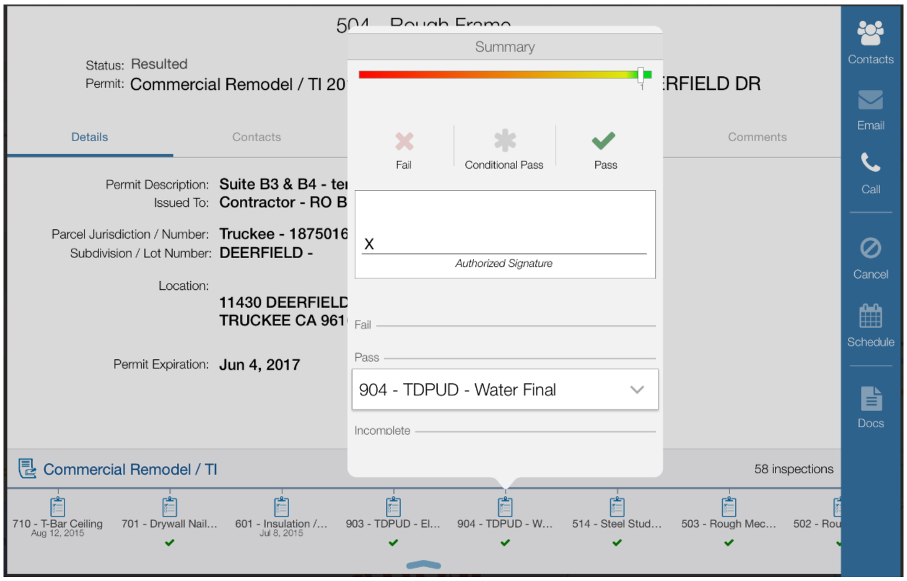


The icon on the top-left side of the timeline represents the inspection parent. Tap this icon to open a pop-up that lists, in descending-date order, all other inspection parents for that location:



Tapping an inspection parent in the list will reload the timeline with the inspections attached to that parent.

Tapping an inspection icon in the timeline opens a pop-up that provides the details of that inspection:

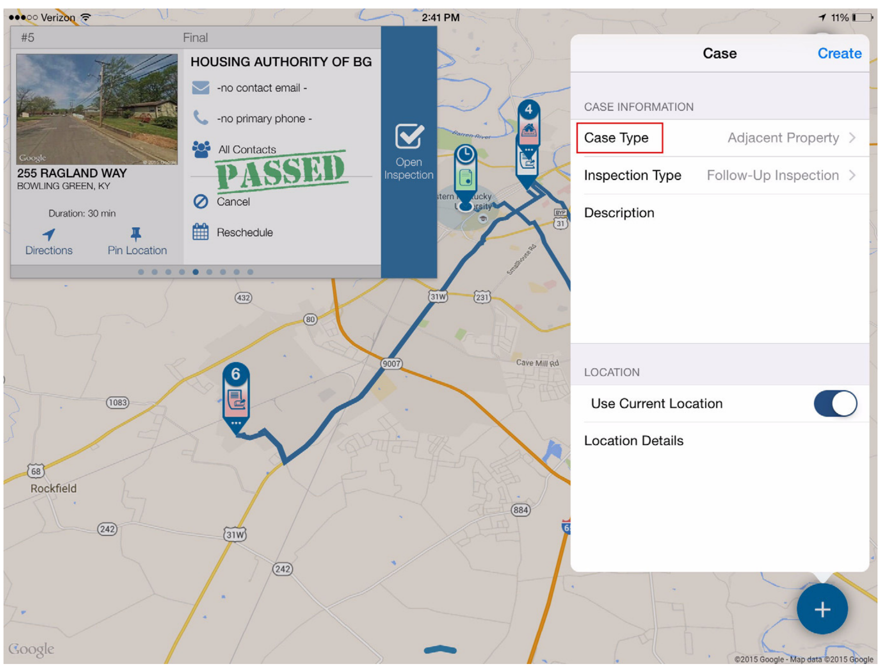


CHAPTER

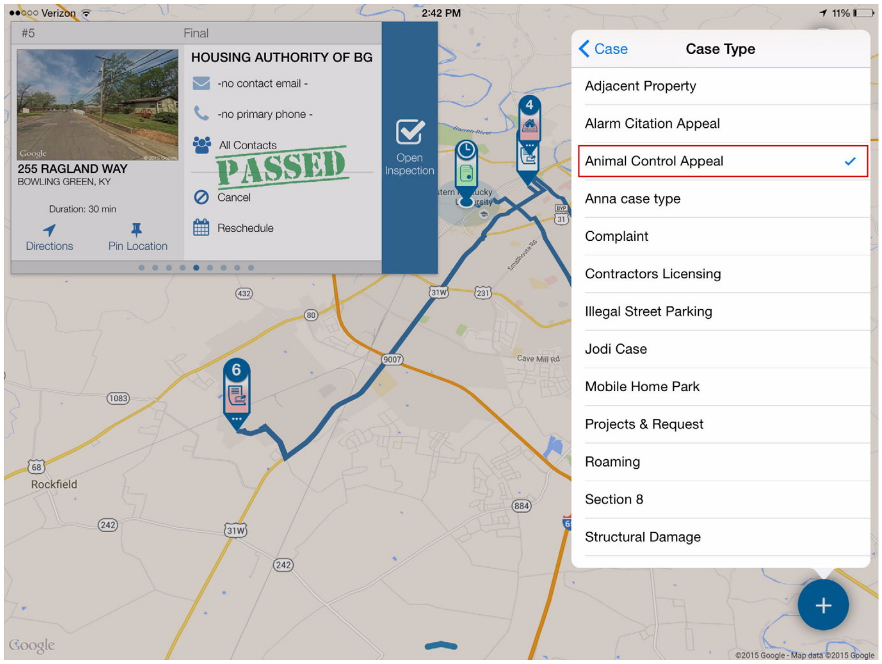
6

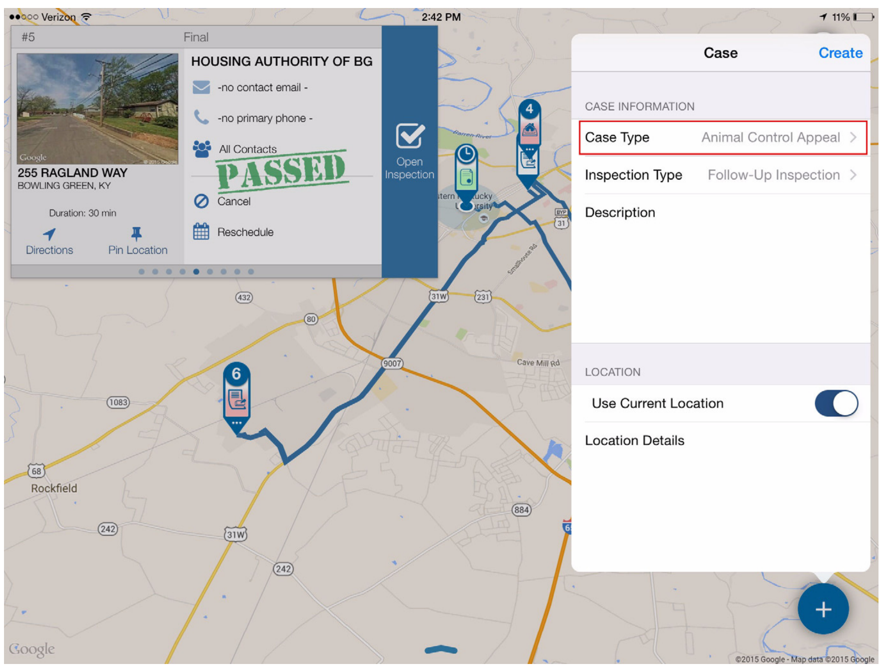
ADD CASE AND INSPECTION

The blue action button in the bottom-right corner of the map lets you create cases in the field and have inspections automatically added to your schedule; for example, while en route to an inspection, if you notice a code violation at another location and want to create a case and inspection for it, tap this button to open the Case dialog:



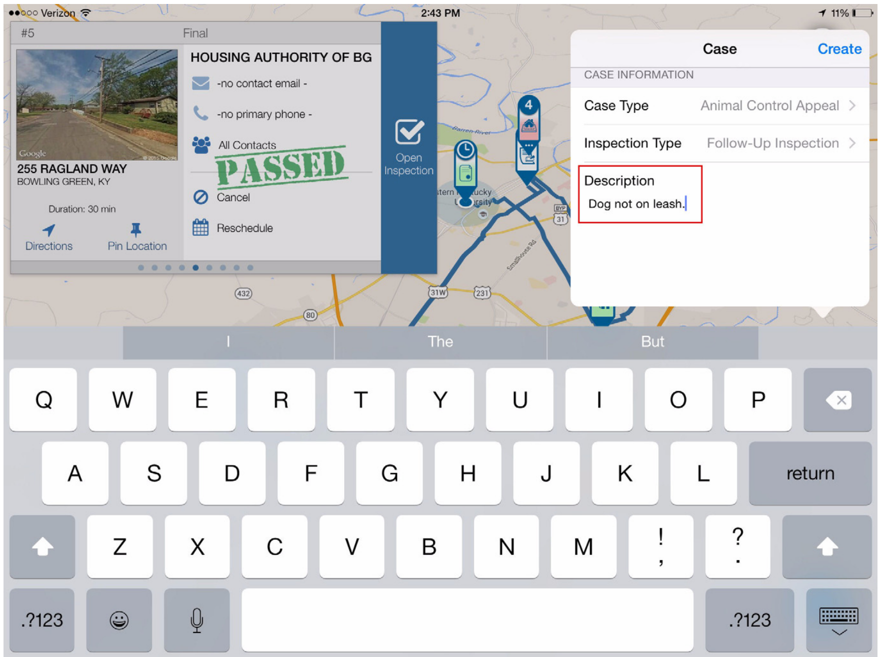
Tap the *Case Type* field to find and select the case type you want to add:





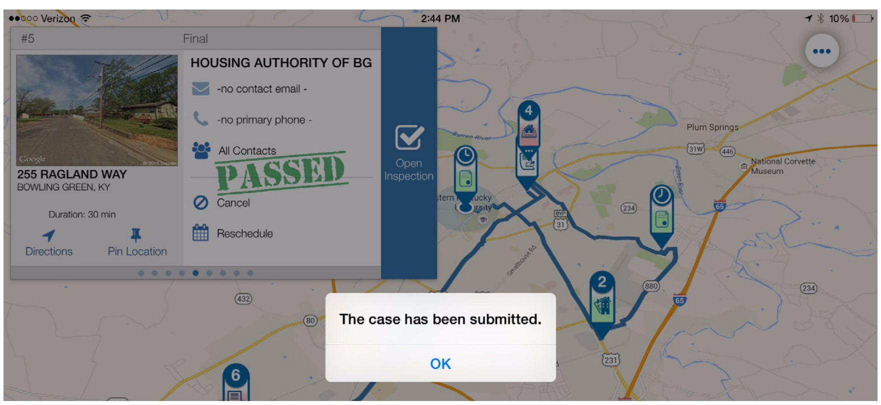
Tap the *Inspection Type* field to find and select the inspection type:

To add a description for the case/inspection, tap the *Description* field. A keyboard will slide up from the bottom of the display:



To place your current location in the *Use Current Location* field, tap the **Locate Me** icon. You also have the option to type the location manually.

Once you have made your entries, tap the **Create** button in the top-right corner of the Case dialog. The dialog will close, and a message will display, telling you the case has been submitted:



Click **OK**.

A case inspection will be created for you and added to your schedule for the current date. You will receive a notification that your schedule has changed. You may then conduct an inspection for the case reported, adding notes, call-out codes, photos and all other relevant data.

APPENDIX

A

TECHNICAL CONSIDERATIONS

iPad

The myInspections application supports the following devices:

- iPad Air
- iPad Air2
- iPad Mini

The application will work with new world ERP.

The application will work with Cellular or WiFi:

- Inspections are loaded in the morning.
- The device may be disconnected all day; inspections will be saved when the device is connected.
- Notifications will occur only when the device is connected.

Back Office

- myInspections 2017 is compatible with new world ERP 2017.1 only
- License framework services
- Licensed per user
- Requires a server outside of the firewall
- May be installed on eSuite machine

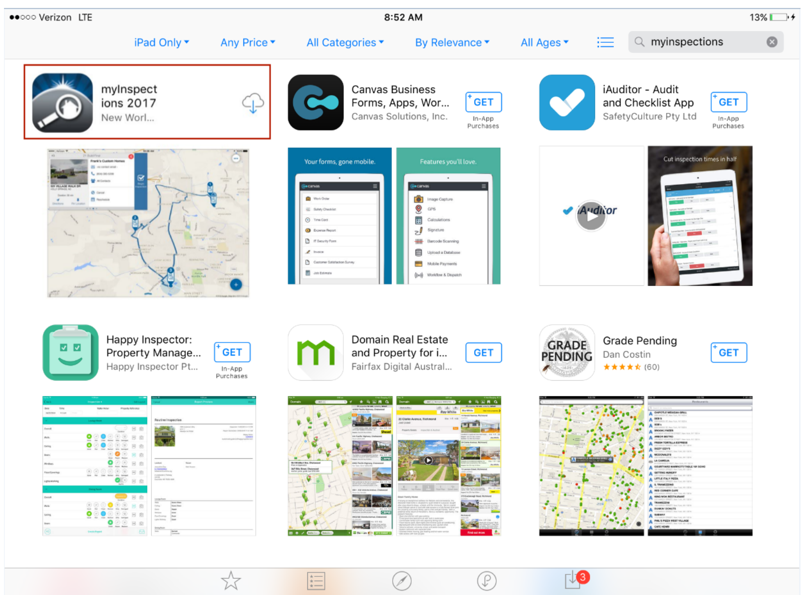
APPENDIX

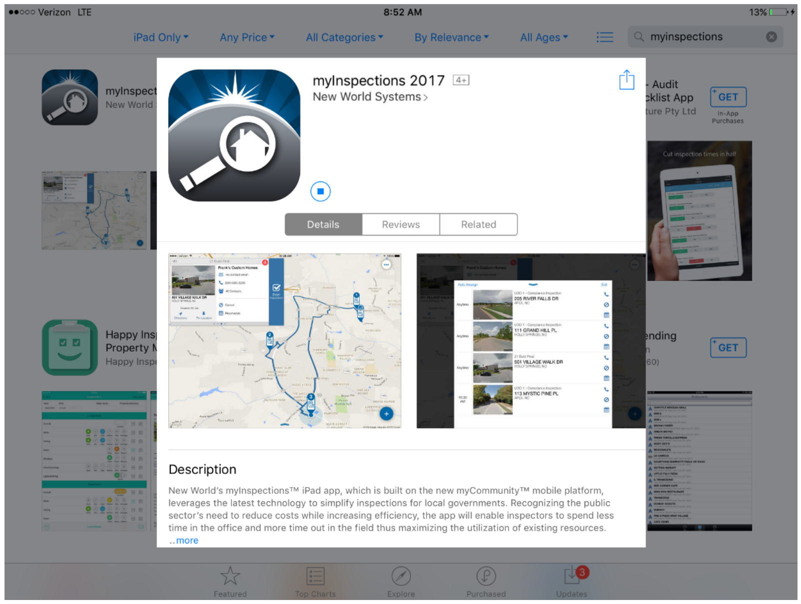
B

INSTALLING MYINSPECTIONS

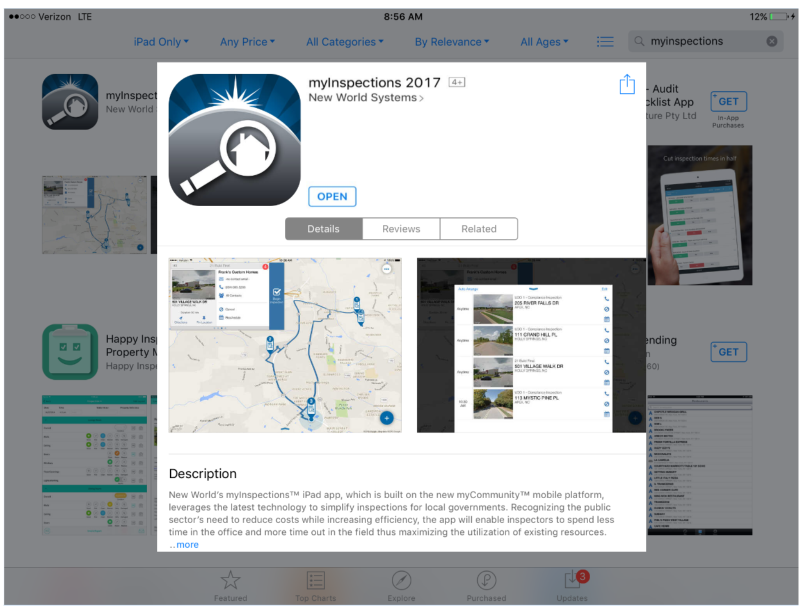
To install the myInspections app, follow these steps:

1. Access the App Store.
2. Search for ***myInspections***.
3. Tap the **GET** button:





4 Tap the **OPEN** button:



5 Launch the myInspections App.

6 To test the myInspections services to verify they were installed correctly, open a browser and navigate to the following link:

https://**[myInspections Server - Fully Qualified Domain Name]**/ cd.webapi.inspections/logos/myinspectionstest

Example:

https://cdcertmobile.nwsdev.newworldsys.com/cd.webapi.inspections/logos/ myinspectionstest

If the server is working correctly, you will receive the following message:

"Success: You were able to successfully hit the new world ERP CD Inspections endpoint."

APPENDIX

C

RELEASE NOTES

Following are descriptions of the myInspections updates that are part of the 2017 release of new world ERP:

- The ability to filter and select comments quickly has been added to the Compliance Item Comments display.
- The compliance item display has been upgraded to allow all compliance items associated with an inspection to be passed or failed at once.
- Inspectors are able to schedule follow-up inspections the same time they create them.
- When a follow-up inspection is selected during the inspection resulting process, the time is included with the date, and the inspection is scheduled automatically for the logged-in inspector.
- A stop work that has been issued to a parcel or permit appears in the Inspection Alerts pop-up, displaying the stop work type and severity.