

# Inspection Processing Guide

*new world ERP – Community Development*



©2018 Tyler Technologies, Inc.

Data used to illustrate the reports and screens may include names of individuals, companies, brands, and products. All of these names are fictitious; any similarities to actual names are entirely coincidental. Further, any illustrations of report formats or screen images are examples only, and reflect how a typical customer would install and use the product.



# Contents

---

System Administrator's Guide .....	1
Community Development System Settings .....	1
Inspection Maintenance .....	3
Trades.....	3
Inspector Profiles .....	4
Codes.....	6
Compliance Items.....	8
Inspection Templates.....	10
Comments .....	13
Notifications.....	13
GIS .....	16
Security Setup .....	17
User-Based Security .....	21
Inspection Processing Guide .....	23
Inspection List/Search.....	23
Search Functionality (Left Pane) .....	23
Inspection Card View (Middle Pane).....	26
Blue Menu Bar (Right Pane).....	27
Resulting an Inspection from the Inspection List/Search .....	28
Inspection Scheduler.....	32
Scheduling Inspections.....	34
Resulting Inspections from the Inspection Scheduler .....	35
Adding a Reinspection .....	37
Inspector Planner.....	38
Inspection Billing Batches .....	45
Stop Work .....	46
Tips and Tricks.....	46

## INTRODUCTION

Welcome to the new world ERP Inspection Processing Guide. This manual will guide the user through both the setup and processing aspects of Inspection Processing.

The guide is divided into two sections:

**The System Administrator's Guide** will focus on the set-up components necessary to utilize Inspection Processing within New World ERP. This will include detailed information on master files that must be set-up such as Inspection and Inspector types, and will also include the security settings which will be utilized to enable workflow and tailor user options to your needs.

**The End User's Guide** will describe the steps, workflow and options available in Inspection Processing to the end-user. It will guide you through the process from requesting inspection, through to scheduling and logging inspections.

This document is available in Microsoft Word format to allow for customization to your agency's needs and procedures.

## SYSTEM ADMINISTRATOR'S GUIDE

### COMMUNITY DEVELOPMENT SYSTEM SETTINGS

*Maintenance > Community Development > Systems Setting s> Inspections Tab*

The screenshot displays the 'Community Development System Settings' window with the 'Inspections' tab selected. The interface is divided into several sections:

- Defaults:** Includes fields for 'Start Time' (07:30 AM), 'End Time' (05:30 P.M.), a checkbox for 'Warn when scheduling an inspection if a balance is owed' (checked), and a 'Default Time of Day' dropdown (Specific Time).
- Citations:** Includes a 'Citation Number Counter' dropdown (Citation), an 'Override Citation Number' checkbox (unchecked), and a 'Complete Inspections with Uncited Violations' dropdown (Do Not Check).
- Miscellaneous Billing Interface Defaults:** Includes a 'Validation and Approval Sequence' dropdown (Require Validation for Approvals), a 'Centralized Inspection Billing Department' dropdown (System Gen.System Gen - System Generated), an 'Invoice Type' dropdown, an 'Invoice Billing Code' dropdown, an 'Apply Administration Fees' dropdown (No), an 'Administration Fee Percentage' field, an 'Administration Fee Billing Code' dropdown, and a checkbox for 'Allow Changes to Approved Inspection Billing Batches' (unchecked).
- Miscellaneous Billing Invoice Item Format:** Includes an 'Item Description' section with dropdowns for 'Invoice Billing Code', 'Violation', and 'Fee', all set to 'Code and Description'. It also includes an 'Administrative Fee Description' section with an 'Invoice Billing Code' dropdown set to 'Code and Description'.

At the bottom left, there are 'Save' and 'Reset' buttons.

The System Settings area contains universal behavior that will control system behavior within the Inspection Module.

The following fields are available in the Inspections tab. The setup in this tab will allow users to perform different functions within the Inspection module. The fields are listed below:

## Defaults Header

*Start Time* – The default start time for inspectors in your organization. Note: This can be changed for each unique inspector if desired in Inspector Maintenance.

*End Time* – The default end time for inspectors in your organization. Note: This can be changed for each unique inspector if desired in Inspector Maintenance.

*Warn Checkbox* – Select this if you would like a warning message to populate should there be a balance owing on the inspection parent (i.e., Permit Balance owing).

*Default Time of Day* – Select from four options: Specific Time scheduling, Any Time scheduling, AM scheduling, or PM scheduling. Note: All options are always available to users that desire unique scheduling types. The default may be changed to any of the other three choices for any inspection.

## Citations Header

---

Note: This will be required only if your organization uses the Inspection Citation Billing module.

---

*Citation Number Counter* – Select the desired counter from the dropdown. If nothing populates in the dropdown, create the citation counter by navigating to *Maintenance > Logos Suite > System > Counters*

*Override Citation Number* – Check the box should you want the ability to override the system created citation number

## Miscellaneous Billing Interface Defaults Header

---

Note: This will be required only if your organization uses the Inspection Citation Billing module.

---

*Validation & Approval Sequence* – Determines the requirements for batch validations and approvals. Financial Management staff may be helpful in this determination.

*Centralized Inspection Billing Department* – Select the department that will be managing the inspection billing invoices.

*Invoice Type* – Select the Invoice Type that will be used for inspection billing. Financial Management staff may be helpful in this determination.

*Invoice Billing Code* – Select the appropriate billing code for Inspection Billing. Financial Management staff may be helpful in this determination.

*Apply Administration Fees* – Select whether or not Administration Fees will apply to Inspection Billing.

*Administration Fee Percentage* – If Administration Fees will apply, select the appropriate percentage charged.

*Administration Fee Billing Code* – Select the appropriate billing code for the Administration Fee if applicable. Financial Management staff may be helpful in this determination.

*Allow Changes to Approved Inspection Billing Batches* – Financial Management staff may be helpful in this determination.

## Miscellaneous Billing Invoice Item Format Header

---

Note: This will be required only if your organization uses the Inspection Citation Billing module.

---

This area allows users to decide what content will display on the Inspection Billing Invoice. Select Code, Description, or Code & Description for the following:

*Invoice Billing Code, Violation, Fee & Invoice Billing Code*

## INSPECTION MAINTENANCE

The following options are available for administrators that are managing the back office setup of the Inspections Module. Access this area of the software by navigating to Maintenance > Community Development > Inspections:

Inspection Maintenance
Codes
Comments
Compliance Items
GIS
Inspector Profiles
Inspection Templates
Notifications
Trades

The items to be managed in the Inspections Module are listed in alphabetical order. However, there is some logic to consider regarding the order in which each attribute is setup. If setting up the system for the first time, this guide recommends the following order:

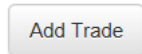
### TRADES

Trades are used as a sorting tool for various Inspection Maintenance items. Each trade serves as a grouping mechanism to categorize and filter data based on the type of trade and its association with a particular inspection template. You may assign multiple trades to codes, comments, compliance items and inspector profiles.

Examples include, but are not limited to: Building, Engineering, Planning, Electrical, Mechanical, Plumbing, Code Enforcement, Rental, etc.

## Adding a Trade

To create a Trade, click the **Add Trade** button:



Enter a required Trade Name and trade description if desired. Click **Save** when finished:

A web form titled "Add Trade" with a light gray header. Below the header, there are two input fields. The first field is labeled "Trade Name" and contains the text "Building". The second field is labeled "Trade Description" and contains the text "Building Department". To the right of the description field is a "Save" button. The form has a clean, modern design with a light gray border.

## INSPECTOR PROFILES

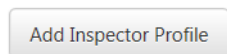
Use this feature to add and edit each inspector's contact information and default work schedule. An inspector may be an employee of your organization or an outside contractor. If the inspector is an employee and you are using the New World ERP Human Resources application, his or her contact information will be defaulted from Workforce Administration.

### Adding an Inspector Profile

## Inspector Profiles

A search and add form for "Inspector Profiles". It features two search input fields: "Search by trade..." and "Search by text...". To the right of these fields is a "Search" button. Below the search fields is a checkbox labeled "Active Only" which is checked. At the bottom of the form is a button labeled "Add Inspector Profile".

Click on the **Add Inspector Profile** button:



Inspector Profile Tab Features:

*Inspector Type* – Inspectors can be classified as External, Internal or Third Party Contractor.

- *External* – Classify your inspector as external if you do not use the New Word ERP Human Resources software for employee tracking, or if you simply do not want to select your inspectors from a list of Human Resources Employees
- *Internal* – Classify your inspector as internal if you prefer to create your inspectors from the Human Resources Employee list. A dropdown list will populate if you choose this option
- *Third Party Contractor* – Classify your inspector as such and a list of vendors will populate in a dropdown list. This will be the vendor list used for Miscellaneous Billing and Accounts Payable

vendors. This list is typically created and managed by the Finance Department. Note: If the third party inspector you are trying to create is not available in this list, use the External option listed above as an alternative

*Active Checkbox* – Leave this box checked as long as the individual is serving your organization as an inspector

*Link to User* – This feature links the inspector to their New World ERP user profile, and is required if your organization will be using the Inspection Mobile App in the field. Otherwise this is not a requirement.

*Job Title* – A placeholder for the inspector's title if desired

*Trades* – Attach a trade (or multiple trades) to the inspector to aid in search classification

*Inspection Worksheet* – Select the Standard form or a Custom Worksheet (built in the Mail Merge module) for that individual's daily run sheet (or other documentation).

*Inspection Result Form* – Select the Standard form or a Custom Result Form (built in the Mail Merge module) for the individual's inspection result report.

*General Information* – Enter the personal details of the inspector here. Include the email address of the inspector if you would like to utilize the Appointment Invitation functionality. First & Last Name are required. Note: If using the Human Resources List to create inspectors, the full proper name of the individual will default into the First, Middle & Last Name fields. These may be overwritten here to display the name of your choosing in the software.

---

Note: The Receive Appointment Invites checkbox when selected, will push scheduled inspections to the Inspectors Microsoft Outlook Calendar, if Outlook Integration has been administered in your environment.

---

*Company Information* – Enter the company details for third party inspectors here if desired

*Schedule Information Tab* – Add working hours to the inspector profile by selecting the days and times the inspector is normally on duty. Users will receive warning messages when trying to schedule inspections during the off times of the inspector. Click **SAVE** when finished.



Inspector Profile
Schedule Information

Add working hours to the profile by selecting a day, start, and stop times.

▼

08 : 00 AM 05 : 00 PM +

Current working hours

Sunday	07 : 00 AM 05 : 00 PM x
Monday	07 : 00 AM 05 : 00 PM x
Tuesday	07 : 00 AM 05 : 00 PM x
Wednesday	07 : 00 AM 05 : 00 PM x
Thursday	07 : 00 AM 05 : 00 PM x
Saturday	07 : 00 AM 05 : 00 PM x

## CODES

This feature will be a repository for any desired code regulation data (i.e. ICC, IFC, Local Municipal Code, etc.) that you would like to track on your inspections. The software offers the ability to upload these as a group via an import template or individually on a manual basis. Linked to Compliance Items (discussed later), these Codes may be shared across multiple trades.

### Codes

Search by trade...
 Search by text...

☒ Active Only

### Adding Codes Manually

Click on the **Add Code** button:

**Book/Year** – Enter the Code Book and Year here. (Examples might include IFC 2012, City Ordinance 2014, ICC 2015, etc.). This is a required field.

**Code** – The code number assigned by the Book (i.e. 301.2 or 415.27 (a)). This is a required field.

**Identification** – A short description of the code. Typically the title of the code ID. (i.e. Unlicensed Vehicles). This is a required field.

*Short Description* – An abridged version of the official code text (Required)

*Description* – Official language from the code library describing the code in detail. This tends to be the “long” version of the code. (Required)

*Code Comment* – Free form text field for additional notes on the code if desired

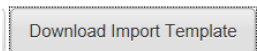
*Effective Date* – Defaults to the current date with the ability to select a date from the date selector.

*End Date* – Date the selected version of the of the code is no longer in effect

*Trades* – Select the trade(s) that the code applies to. In doing so, the trade will only populate for compliance items that have a matching trade. This will simplify the user’s selection process and increase efficiency.

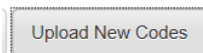
### **Adding Codes with the Import Template**

Click on the **Download Import Template** button:

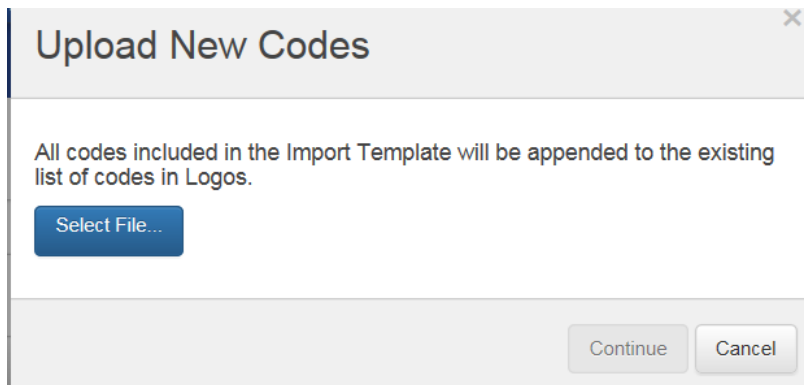


*Add data to the spreadsheet* - An Excel Spreadsheet with 8 column headers will open. The headers represent the Codes data fields mentioned above. Note that the required fields are marked with an asterisk (\*). Fill out the spreadsheet and save it to your computer

Click on the **Upload New Codes** button:



Click the Select File button when the window opens:



Once you’ve selected the Import Template, click the Continue button. A window will appear indicating the success or failure of your import. Note that the import will append the Codes list, it will not overwrite it. Additionally, Trades are not an importable feature so you will want to add trades to the newly imported Codes. These will be easy to spot as Codes in the list that already have Trades will display them in green, just beneath the Code. Your newly imported Codes will not have this displayed.

**TT - 2015 / C.104.320 / Tall Grass and Weeds**  
DPZ

## Adding New Versions of a Code

The software offers the ability to update Codes to accommodate changes in the Code Book over time. The Version History section contains three sub-sections showing the effective dates of the Current version of the code, the Future version(s) and the Archived version(s) for historical records. Click the title bar of each sub-section to view or hide effective dates

To update a Code, click on the Code Link from the Codes list

Give the current version of the Code an End Date based on the date you plan on adopting the new version of the code. Click **Save** when finished.

End Date    Today    09/01/2016    

Click on the **New Version** button:

### Version History

The system will open a new Code Profile and add a new date range starting one day after the End Date of the Current Code profile:

Current
10/10/2014 - 09/01/2016
Future
09/02/2016 - Open (New)

At this point, the Administrator can make any changes to any of the offered Code Fields. Click **Save** when finished. As of the future Effective Date, the new Code and its newly changed features will become available to inspectors.

## COMPLIANCE ITEMS

Compliance Items, previously known as Tasks, comprise a list of activities that are typically done during an inspection. The software requires that a minimum of one Compliance Item be attached to each Inspection Template. One might wonder why this manual recommends that Compliance Items be created prior to the Inspection Templates they are a part of. To answer this, it is important to explain that Trades & Codes are attached only to Compliance Items and not to Inspection Templates. Should different Trades be associated with different Compliance Items on the same Inspection Template, any Inspector that is associated with any of the Trades pinned to these Compliance Items will be prioritized where Inspector eligibility is concerned. If this seems confusing, this will be explained more thoroughly in the Inspection Scheduling processes defined in the Inspection Processing section of this guide.

**Important:** It is highly recommended that you plan which Compliance Items will be tracked on each Inspection Template prior to entering data. Additionally, the Compliance Item list will tend to be very long. It is advisable to create the Inspection Template immediately after creating all of its Compliance Items. This will allow the addition of the Compliance Items before the Item list gets too long. One more

item worth noting. Code all of the Compliance Items with an identical numeric or word based code to keep them together in the list as the system will list them alphabetically:

## Compliance Items

Search

Add Compliance Item

### Adding a Compliance Item

Click on the **Add Compliance Item** Button:

Add Compliance Item

Enter a required description.

Enter a short description. This field is used only to abridge the Compliance Item description on the Mobile App display. Customers not using the Inspectors Mobile App may ignore this field.

Click in the Trades field. Notice that all active trades are eligible to be added to the compliance item. Click on all eligible Trades. There is no limit to the number of Trades you can add:

Trades

Codes

ing & Const

All

Building

Code Compliance

Demolition

Grading

Heating and Cooling

Plumbing

The Trades field will look like this once all of your selections have been made:

Trades

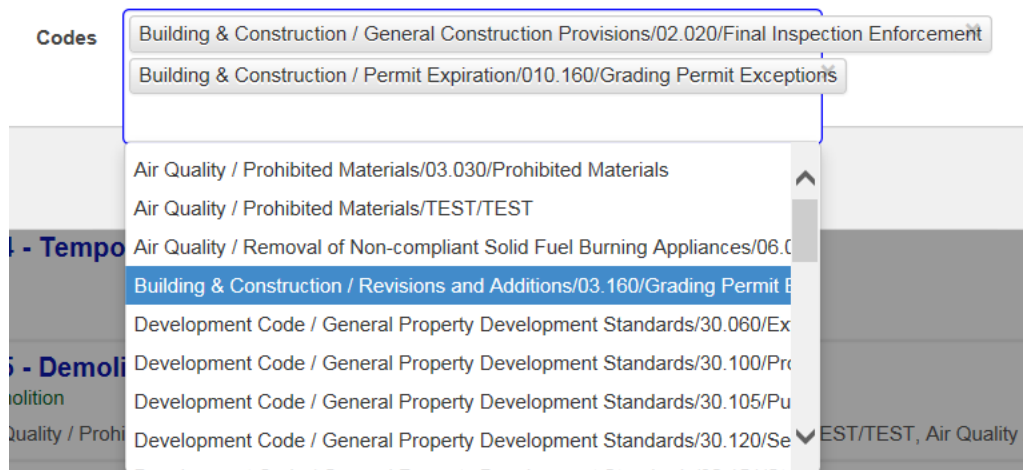
Building x

Code Compliance x

Grading x

Plumbing x

Click into the Codes field. Click on any Codes that could be sited on that particular task. There is no limit to the number of Codes that may be added. Click **Save** when finished.



Continue entering the Compliance Items for each Inspection. Once entered the administrator can begin creating Inspection Templates.

## INSPECTION TEMPLATES

Formerly known as Inspection Types, Inspection Templates represent the group of inspections done by each department. Each Inspection Template will have one required Compliance Item among several other features. As mentioned previously, it is recommended that a naming convention be utilized so that Inspection Templates and Compliance Items can be paired more easily.

## Inspection Templates

☒ Active Only

### Adding Inspection Templates

To begin adding an Inspection Template click on the **Add Inspection Template** button:

### General Details

The Add Inspection Template module is divided into three sections. The top section is list of general details that can be managed.

*Name* – Name the Inspection here.

*Active Checkbox* – Uncheck only if the inspection Template is no longer being used.

*Estimated Duration* – The default time it takes to complete the inspection. This will be the default timeframe seen on an inspector’s calendar after the inspection is scheduled. Note: This duration can be manually adjusted for each inspection as needed.

*Results Method* – Three options are offered:

- *Pass/ Fail* – Inspectors will be able to Pass, Fail, or Conditionally Pass an inspection.
- *Points* – Each compliance item will have a predetermined point value. The system will offer a default pass or fail result based on the number of points earned compared to the total amount required to pass.
- *In/Out* – A points based inspection typically used for Health Inspections.

*Create Reinspection* – Checking this box will allow users to set up follow up inspections after resulting an inspection

*Override Results* – Allows users to override the system’s default result (i.e. when a points based inspection does not meet the points requirement and the inspector would like to pass the inspection regardless).

*Allow Compliance Item Edits on Inspection* – Checking this box allows users to add or subtract Compliance Items for any individual inspection on the fly should the need arise. Note: This will not impact the default compliance items set up on the Inspection Template

*Compliance Item Result Default:* Three options are offered:

*Not Resulted* – The user will result each Compliance Item individually

*Pass All* – All Compliance Items will start with a result of “Pass” and may be adjusted accordingly after the inspection. Great for inspections that rarely fail.

*Fail All* - All Compliance Items will start with a result of “Fail” and may be adjusted accordingly after the inspection. Great for inspections that have a high rate of failure.

### **Compliance Items on the Inspection Template**

To add (or manage) Compliance Items on your Inspection Template, click the **Manage Compliance Items** button.

Manage Compliance Items

*Add Category* – Allows users to categorize groups of Compliance Items for better organization. This feature is optional.

Add Category

Type your category in the field provided. From here you can drag any Compliance Items previously created into the category field. Moreover any Compliance Items created subsequently can be added to a category as needed:

100 Series Compliance Items

100 - BMP / Erosion Protection - extra detail here

100 - Check Piers

*Add Compliance Items* – Clicking here will populate a dropdown with the entire list of Compliance Items to choose from. Each item will need to be selected one by one until your list is complete:

Add Compliance Item

*Required Checkbox* – Checking this will require that the user results that Compliance Item before the system will allow the user to result the inspection. Only use this feature if the Compliance Item is always necessary

*Total to Pass Field* – This field gives administrators the option of determining how many passing Compliance Items will be required for the system to recommend a passing result for that inspection. (The system will recommend a “Fail” otherwise) If a passing result is to be assumed, put “0” in the field. Note: the Red Triangle icon indicates a unique message. Hover over it with your cursor to see its meaning:

Compliance Items

Total to Pass

Total to Pass must be between zero and the total number of compliance items.

### Inspection User Defined Fields

User Defined Fields

Add a UDF

Insp UDF #1 (Text)

Administrators may select any number of previously created Inspection Based User Defined Fields for tracking purposes. These UDF’s can be created in the UDF module. Navigate to the following to create UDFs:

*Maintenance>Logos Suite>Security>User Defined Fields*

Click **Save** when your Inspection Template creation steps are complete.

## COMMENTS

Unlimited pre-populated comments may be configured to aid users in adding comments on an inspection quickly and efficiently. Trades may be assigned to Comments to ensure that only the needed portion of the Comments lists populates on the Compliance Item being commented on. This feature is optional as manual comment entry may be preferred.

### Comments

Search by trade...	Search by text...	Search
Add Comment		

#### Adding Comments

Click on the **Add Comment** button:

Add Comment
-------------

*Short Description* – A code, or short version of the comment

*Description* – The full comment language desired

*Trades* – Apply Trades to insure this comment only populates when necessary. If Trades are not applied, the comment will be available on all Compliance Items for all Inspections

Click **Save** when finished:

Short Description	Gas line
Description	Gas line must have shutoff
Trades	Plumbing X

## NOTIFICATIONS

Notifications may be created for unique events that occur in the software. It is important to understand that the recipient of the notification is predetermined (in most cases) by the contacts set up in the *Parent* modules. Note that your SMTP server and email settings must be input correctly in Maintenance System Settings for the Notification feature to function properly.



Email	
SMTP Server	mail.newworldsys.com
From Email Address	someone@newworldsys.com
System Admin Email Address	someone@newworldsys.com
Total Attachment Size Limit	5 MB
Maximum Attachments	5

### Notification Recipients

The following items describe who will receive the Notification by default, based on the parent the inspection is attached to:

#### Permit Inspection Notifications:

If the *Issue To* is a Contractor, the notification will be delivered to the Licensee email address listed on the Contractor Licensee profile in the Licensing Module

If the *Issue To* is the Owner, and no Contractor is associated to the permit, the notification will be delivered to email address listed on the Parcel Owner profile in the Parcel Management module

If the *Issue To* is the Owner and a Contractor is associated with the permit, both the Owner and Contractor will receive emails based on the email sources listed above.

If the Permit Contact email field is utilized during permit creation, an email will be sent to this address as well.

Keep in mind that the three possible email option for Permit Inspections work independently from one another. The possibility that a recipient receives duplicate email does exist should the same email address be entered in two different places.

*License Inspection Notifications* – If a License Inspection produces a notification, the email address associated to the Licensee will receive the notification

*Business Inspection Notifications* – The email address associated with the Business Owner will receive the notification

*Case Inspection Notifications* – The email address associated with the Case on the Case Management page will receive the notification

*Address Inspections* – The email address associated with the Parcel Owner record in the Parcel Management module will receive the notification

## Creating Notifications

### Notifications

Search

Add Notification

Click on the **Add Notification** button:

Add Notification

**Notification Name** – Enter a required name for the notification

**Inspection Event** – Eight events are offered that will drive the notification. Multiple events may be selected based on the notification required. This field is required:

Inspection Event	
Inspection Template	Appointment Canceled
	Conditional Pass
	Failed
Additional Information	Inspector Reassignment
	Passed
	Reinspection Created
Email	Report Created
	Scheduled

**Inspection Template** – Select the Inspection Template(s) that, when coupled with the Inspection Event(s) previously selected, will drive the Notification. At least one Inspection Template must be selected per Notification.

**Additional Information** – Enter free form text that will appear in the body of the Notification email if desired.

**Email** – If an email address is attached to a Notification, that address will receive an email based upon the notification criteria as described above. This feature is used for notifying internal staff as well as third parties that might have an interest in the inspection detail. To add an email, simply type it into the email field and click on the plus sign next to the field. An unlimited number of email addresses can be added to a Notification.

## GIS

Use this page to configure the interface with Community Development and the ESRI map you have created in ArcGIS online:

Inspection Maintenance

Codes

Compliance Items

Contacts

Comments

Inspector Profiles

Inspection Templates

Trades

Fees

Notifications

GIS

### GIS Maintenance

Map ID: a6bac4cb53c743f8bb931fc3f1f6ef00

Application ID: 1y7kncWb7z1zHxA

Application Secret: 4510e6083ec349b1af707e19ef718d26

#### Geocoder

Type: Esri World Geocoder

URL: http://geocode.arcgis.com/arcgis/rest/services/World/GeocodeServer/

Save Test Connection

Maps may be shared between ArcServer and ArcGIS online. You may use the ESRI Geocoder (identifies addresses by latitude/longitude) or your own. Credits are required for the GEOCoding Service if you use ArcGIS online. Map layers are supported. The feature is not tied to a specific version of ArcGIS.

---

Note: For the map link to be enabled, you must be licensed to GIS.

---

Note: If you use the ArcGIS World Geocoder service or a custom geocoder service that requires authentication, you will need to provide application credentials that allow for the use of the geocoding service. When the map loads in the map viewing area, it creates a login with the Application ID and the Application Secret. The response contains a token that is used on calls to the geocoder service or for any other service that requires the ability to consume credits.

---

### GIS Maintenance

**Map ID** - Typically 32 characters long, free-form alphanumeric entry identifying the map. This field may hold 100 characters.

(Sample Map ID: a6bac4cb53c743f8bb931fc3f1f6ef00)

**Application ID** - Typically 16 characters long, free-form alphanumeric entry identifying the application. This field may hold 100 characters.

(Sample Application ID: CRnzN3SfV9X7sUS5)

**Application Secret** - Typically 32 characters long, free-form alphanumeric entry identifying the application secret. This field may hold 100 characters.

(Sample Application Secret: 4ac58cb17f6441998b011bc5e8fdeab1)

### **Geocoder Data**

*Type* - Identifies the Geocoder type. Available selections: *Esri World Geocoder* and *Custom*

*URL* - Free-form alphanumeric entry identifying the Geocoder URL. This field may hold 200 characters.

If Geocoder Type = Esri World Geocoder, set value to  
<http://geocode.arcgis.com/arcgis/rest/services/World/GeocodeServer/>.

If Geocoder Type = Custom, key in the URL location of the custom geocoder service.

Once you have completed the setup on this page, clicking the **Map** button on the Inspector Planner page will replace the list of inspections with the map served up from ArcGIS Online. This will be described in more detail in the Inspection Processing Guide.

## SECURITY SETUP

Security for Inspection Processing is controlled through Application Permissions and User-Based Security. Process Manager is not used under Inspection Security. Workflow is controlled through **Permissions and User Based Security** which will control what the user is allowed to enter.

### **Inspection Security**

The checkboxes contained in this area are driven by the inspection entry, scheduling, and inspection creation. Selecting the checkboxes for individual levels within this area will allow the user to perform inspection processing functions for which they have application permissions, for that level. Not selecting a level will deny the user access to the unselected level of security. This feature will be used to designate maintenance & inquiry capability for inspections.

### **Inspection Reports Security**

The checkboxes contained in this area will give users ability to reports contained in the inspection module. Selecting a report will give users the ability to print that report.

### **Application Permissions**

Application Permissions for Inspection Processing can typically be completed effectively with 3 general template groupings. The first is intended to give users all access to the Inspection & Inspection Reports feature group. The second template is used for all users that need access to enter/schedule inspections within New World ERP. The third template is used for all users that need access to view inspection results or the schedule of inspectors. This is considered a view only or inquiry only, so users can enter search for parcel information, but cannot add or change data.

Maintenance>Logos Suite>Security>Users>Click Permissions Button

**Permission Type – Company Applications**

**Feature Group – All**

**Component Name – Inspection**

**Click Search**

Permission Type	Company Applications	Feature Group	<All>	User Specific	<input type="checkbox"/>
Component Name	Inspection	Application			
Company	Town of Truckee				
<input type="button" value="Search"/> <input type="button" value="Reset"/>					

There are several new permissions that have been added to the inspections list. These will default with Deny privileges (red X's across). Under Company Applications the new permissions will be:

**Inspection Details**

**Inspection Results**

**Inspections Maintenance**

**Result Inspections**

**Schedule Inspections**

**Be sure to add these to the appropriate Security Template, or simply assign them per user**

Application	Component	All	Add	Change	Delete	View/Use	Print
Community Development	Inspection Results	✗					✗
Community Development	Inspections Maintenance	✗		✗		✗	
Community Development	New Inspection Request	✓	✓	✓	✓	✓	✓
Community Development	Permit Inspection Report	✓					✓
Community Development	Print Inspection Report	✓					✓
Community Development	Result Inspections	✗		✗			
Community Development	Schedule Inspections	✗		✗	✗		
Community Development	To be removed in a future release - Inspection Center	✓				✓	✓
Community Development	To be removed in a future release - Inspection Lite Processing	✓	✓	✓	✓	✓	✓
Community Development	To be removed in a future release - Inspections	✓	✓	✓	✓	✓	✓

App	Component	Description	All	Add	Change	Delete	View/Use	Print
CD	Business Inspection Report	Provides the ability to see the report for business code enforcement inspections	✗					✗
CD	CD Inspection Processing	Provides the ability to log inspections within the inspection module	✗				✗	
CD	CD License Inspection Report	Provides the ability to see the License Inspection report	✗					✗

App	Component	Description	All	Add	Change	Delete	View/Use	Print
CD	Community Development Inspection Standard Responses	Provides the ability to enter, change, and view inspection standard responses under either tasks or violations.	X	X	X	X	X	X
CD	Community Development Inspection Type	Provides the ability to add, change, view inspection types under maintenance	X	X	X	X	X	X
CD	Inspection Billing Batches	Provides the ability to Create Inspection Billing Batches	X	X	X	X	X	X
CD	Inspection Billing Batches – Process Manager Approve	Provides the ability to approve Inspection Billing Batches	X		X			
CD	Inspection Billing Batches – Process Manager Post	Provides the ability to post Inspection Billing Batches	X		X			
CD	Inspection Billing Batches – Process Manager Validate	Provides the ability to validate Inspection Billing Batches	X		X			
CD	Inspection Billing Batches – Edit & Post Listing	Provides the ability to produce the Edit & Post Listing Reports for an Inspection Billing Batch	X					X
CD	Inspection Billing Batches – Error Listing	Provides the ability to produce the Error Listing Reports for an Inspection Billing Batch	X					X
CD	Inspection Citation Form	Provides access to the inspection citation form mail merge document if created	X					X
CD	Inspection Details	Provides access to the Inspection Details page in the inspection edit mode	X		X		X	
CD	Inspectors Results	Provides access to the Inspection Result page	X					X

App	Component	Description	All	Add	Change	Delete	View/Use	Print
CD	Inspections Maintenance	Provides administrators access to the Inspection Maintenance module	X		X		X	
CD	Permit Inspection Report	Provides access to the Permit Inspection Report in Permit Reports	X					X
CD	Print Inspection Report	Provides access to the <b>Print Inspection Report</b> Button in the inspection edit mode	X					X
CD	Schedule Inspections	Provides the ability to schedule inspections	X		X	X		

#### Permission Type – Company Applications

#### Feature Group – All

#### Component Name – Inspector

#### Click Search

Permission Type	Company Applications	Feature Group	<All>	User Specific	<input type="checkbox"/>
Component Name	inspector	Application			
Company	Town of Truckee				
Search		Reset			

App	Component	Description	All	Add	Change	Delete	View/Use	Print
CD	Community Development Inspectors	Provides administrators access to create and edit inspectors in Maintenance	X					X
CD	Inspector's Worksheet	Provides users access to create standard Inspector's Worksheets	X					X
CD	Inspector's Worksheet Mail Merge	Provides users access to create Inspector's Worksheets created as a Mail Merge form	X	X			X	

## Permission Type – Company Documents and Notes

### Feature Group – All

### Component Name – Inspection

Click Search

Permission Type	Company Documents and Notes	Feature Group	<All>	User Specific	<input type="checkbox"/>
Component Name	Inspection	Application			
Company	Town of Truckee				
<input type="button" value="Search"/> <input type="button" value="Reset"/>					

App	Component	Description	All	Add	Change	Delete	View/Use	Print	Checkout	Undo	Finalize	Reminder
CD	Inspection Compliance Item Documents	Provides ability to upload and use Compliance Item Documents	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
CD	Inspection Documents	Provides users access to attach documents when logging inspections	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
CD	Inspection Notes	Provides users access to notes when logging inspections	✓	✓	✓	✓	✓	✓				

## USER-BASED SECURITY

User Based Security gives access to specific functions within New World ERP. Once permission based security is granted, this second level of security will determine what the user can see and use once they access a module. Where inspections are concerned, *Inspector* User Based Security will need to be granted.

### User Based Security/Inspector Tab

*Maintenance>Logos Suite>Security>User Based Security*

The Inspector Tab within User Based Security is shown below. Select the user that needs security to particular inspectors, then move the appropriate inspectors from Available Inspectors to Authorized Inspectors:



User-Based Security - Inspectors

User

nws

Function

Inspectors

Available Inspectors: 2

1131 - Court Magistrate Hearings

Adam Johnson - Adam Johnson

Authorized Inspectors: 12

54 - Gerard C. Bien

57 - Emilie P. Lilliton

252 - Gerald J. Locker

254 - Barbara A. Elm

351 - Bruce E. Mc Derman

352 - Danford L. Gyorke

459 - Alejandro G. Counter

559 - Ruth A. Herringer

1049 - Gary Zepke

4650 - Franklin Judson

4859 - Theodore Samsong

5867 - Amy E. Binstocker

## INSPECTION PROCESSING GUIDE

Inspection Processing in New World ERP offers three unique inspection processing functions (List/Search, Scheduler, Planner) as well as the Inspection Billing Batch module for those who are utilizing the Citation Billing functionality.

### INSPECTION LIST/SEARCH

*Community Development>Inspections>Inspection List/Search*

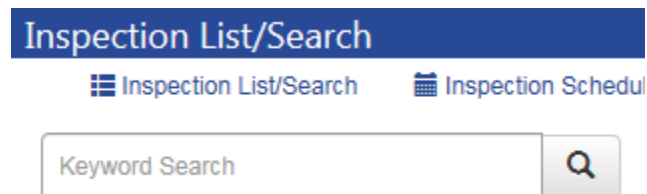
The Inspection List/Search page is the central location for finding and processing inspections, viewing associated parent information and printing inspection result reports.

Use the fields and check boxes in the left pane to generate a list of inspections in the center pane. Use the blue menu bar in the right pane to perform actions on selected inspections.

When you first navigate to this page, the list of inspections will default to those that have been scheduled for today. Use the following fields and check boxes in the left pane to generate the list of inspections you want to review or process.


#### SEARCH FUNCTIONALITY (LEFT PANE)

*Keyword Search* - The left pane gives users the ability to produce inspection cards that match the text you type into the search field. To get results, simply click on the magnifying glass or press enter:


The screenshot shows the top portion of the 'Inspection List/Search' web application. At the top is a dark blue header bar with the text 'Inspection List/Search' in white. Below the header, there are two navigation tabs: 'Inspection List/Search' (active, with a list icon) and 'Inspection Scheduler' (inactive, with a calendar icon). Below the tabs is a search bar with the placeholder text 'Keyword Search' and a magnifying glass icon to its right.

*Date Range* – Shows Inspection Cards with statuses that were applied with the date range selected. Some unique features can be utilized within the date range:

## Date Range

Today 03/20/2016 

To

Today 03/26/2016 

Clear Date

No Start No End

Last Week This Week

Last Month This Month

- *Today Button* – Clicking the **Today** button will default today's date into the date field:

Today

- *Calendar Button* – Populates a calendar for date selection:

< March 2016 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	01	02	03	04	05
06	07	08	09	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	01	02
03	04	05	06	07	08	09

- *Quick Date Options* – offers quick access to commonly used date ranges. Note you may do searches without start and/or end dates. The search will find all inspections based on your other search criteria in this case. Click on the Chevron below the End Date field to access these options:

Quick date options

Clear Date

No Start No End

Last Week This Week

Last Month This Month

*Linked To* - Show inspection cards linked to the types of parent items selected here. Selecting a *Permit* or *License* parent will display another set of check boxes giving you the option to narrow the search further by selecting the permit or license types:

#### – Linked To

- ☒ Permit (1)
- ☐ Case (0)
- ☐ License (0)
- ☐ Business (0)
- ☐ Location (0)

#### – Permit Type

- ☐ R - New SFR - Single Family Residence (1)

*Status* – There are a number of statuses to filter by. They are defined below:

- *Created* – Inspections that were selected during permit creation that have not been scheduled yet.
- *Requested* – Inspections that were requested from permit holders from the ePermits. Note: this is a new definition of the term *requested* compared to the classic CD product. It is important to understand that the created status mentioned above is different from the requested status.
- *Scheduled* – Inspections that have been scheduled & assigned to inspectors. When selected another set of check boxes will populate allowing users to filter by inspector
- *Resulted* – Inspection that have been Passed, Conditionally Passed or Failed. Note when this status is selected, another set of check boxes will populate allowing users to filter by specific result and/or inspector:

#### – Status

- ☐ Created (0)
- ☐ Requested (0)
- ☐ Scheduled (1)
- ☒ Resulted (0)
- ☐ Appointment Canceled (0)
- ☐ Past Due (0)

#### – Result

- ☐ Conditional Pass (0)
- ☐ Failed (0)
- ☐ Passed (0)

- *Appointment Canceled* – Inspections that were once scheduled, but were later canceled.
- *Past Due* – Inspections that were scheduled to be completed prior to today's date but are not yet resulted.

*Trades* – Inspection cards for the trades listed here

*Inspectors* – Shows the inspection cards

## INSPECTION CARD VIEW (MIDDLE PANE)

Your search will produce *Inspection Cards* in the middle pane. The following are features of the inspection cards:

11871 SADDLEBACK DR TRUCKEE, CA 96161	301 - Ground Plumbing (Unassigned)	Created 03/28/2015
2 Permit - Single Family Residence - 2014-00000728		<a href="#">View Details</a> ▼

*Address* – The address will be visible in the upper left corner

*Parent* – The inspection's parent will be visible as a hyperlink in the lower left corner. Clicking on the hyperlink will open a window that will provide users with a read only view of all parent attributes:

Permit Details	
Permit	R - New SFR - Single Family Residence - 2014-00000467
Address	15339 SKISLOPE WAY TRUCKEE, CA 96161
Status	Permit Issued - 09/04/2014
<div>Details   Contacts   Conditions   Documents   Comments   History</div>	
Issued Date	09/04/2014
Description	RESIDENCE (4133 SF) / ATTACHED GARAGE (834 SF) MECHANICAL ROOM
Issued to	GALLAGHER CONSTRUCTION
Jurisdiction Parcel #	Truckee 4619003000
Subdivision	TAHOE DONNER
Lot #	N/A
Location	N/A
Expiration	09/03/2016

*Parent Alerts* – This is represented by a red dot next to the parent (if applicable). Hovering over the red dot with your cursor will reveal any alerts on the permit record. Examples might include parcel messages or balances owed on the permit.

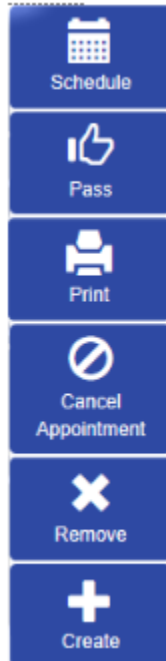
*Inspection Template* – The type of inspection and inspector assigned (if applicable) will be visible in the upper middle of the inspection card

*Status & Status Date* – These will be visible in the upper right corner

*Inspection View Details* – This link will be available in the lower right corner of the inspection card and is one portal to the Inspection Details mode. From here users can result Compliance Items, result inspections, view history, manage Inspection UDF's, view documents, schedule inspections, and print Inspection Worksheets. Note: These items will be explained further below.

## BLUE MENU BAR (RIGHT PANE)

The following features are available in the Blue Menu Bar:



### *Schedule*

- The Schedule Inspection dialog opens when you select an inspection with a status of Created, Requested or Appointment Canceled and click the **Schedule** button.
- The Reschedule Inspection dialog opens when you select an inspection with a status of Scheduled or Past Due.
- If you select an inspection with a status of Resulted, the label of the **Schedule** button will change to Re-inspection. Clicking it will open the Create Re-inspection dialog.
- All three dialogs ask you to select the date of the inspection, time of day and inspector.

*Pass* - To pass a scheduled inspection, select it in the list of inspection cards, and click this button. Passed will display in green in the right column of the inspection row. You may pass multiple, scheduled inspections simultaneously by selecting each one in the list, then clicking Pass.

*Print* - Enabled for inspections with a status of Resulted, this button generates and displays an Inspection Results Report containing the details of the resulted inspection.

*Cancel Appointment* - To cancel a scheduled inspection, select it in the list of inspections, and click this button. Appointment Canceled will display in red in the right column of the inspection card. You may cancel multiple, scheduled inspections simultaneously by selecting each one in the list, then clicking Cancel Appointment. Note: This will requeue the inspection making it eligible to be rescheduled in the future

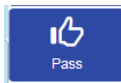
**Remove** - To remove an inspection, select it in the list of inspection cards, and click this button. A dialog will display to alert you that this action will delete the inspection from the system permanently. To go ahead with the removal, click Yes. To cancel the removal, click No.

**Create** – Allows users to create inspections from scratch, attaching them to the appropriate parent

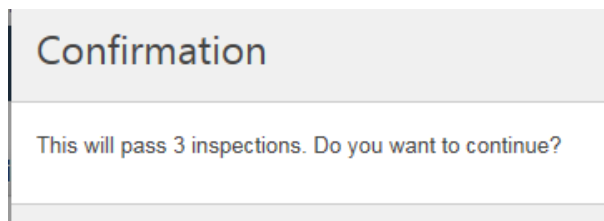
## RESULTING AN INSPECTION FROM THE INSPECTION LIST/SEARCH

**Quick Pass** – For those inspections that have passed and no comments are necessary.

- Search for your scheduled inspections.
- Highlight the Inspection Card(s) you would like to Quick Pass.
- Click on the **Pass** button in the right pane.



- A confirmation window will open. Click Yes to pass your inspections:



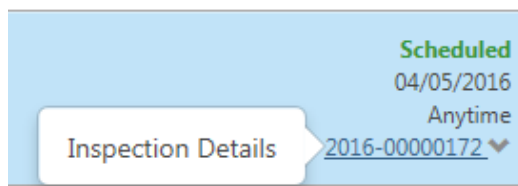
---

Note: Multiple Inspections may be Quick Passed at once

---

**Detailed Resulting** – Typically used for failed inspections, conditionally passed inspections or any inspections requiring comments.

- Search for your scheduled inspections.
- Click on the Inspection Details Link (the Inspection Number).



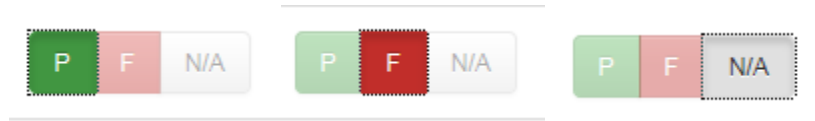
- When the Inspection Details screen opens, click on the Results option.



- You have the option of managing your compliance item(s) individually, or resulting the inspection outright, without managing the compliance item(s).

## Compliance Item Resulting

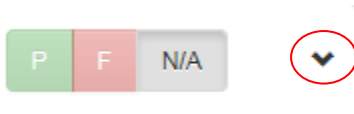
*Pass, Fail or N/A* - Simply click on the appropriate box to indicate your selection. Note: resulting Compliance Items does not result the Inspection. The Compliance Items indicate which portions of the inspection passed, failed or were not applicable to that inspection:



Note: Failing an inspection will automatically pass any Compliance Item that has not been resulted. Many users will therefore manage only the Compliance Items that have failed and allow the system to pass all others when they result the inspection.

## Adding Comments and/or Violations to a Compliance Item

- Click on the Chevron next to the Compliance Item Pass, Fail, N/A option:



- Click on the **Add Row** button:

Comments	Codes in Violation
<div>+ Add Row</div>	



- A box will open for both Comments and Codes. Select a prepopulated comment from the comments list (if created in setup) or type in your own unique comment. Select a code (if created in setup) from the Codes in Violation Box if desired.

Repeat for all Compliance Items you wish to result. Be sure to click **Save** at the bottom of the page when finished:



*Inspection Comments* – Any general inspection comments can be entered in the inspection Comments field. Click **Save** when complete:



Status	Scheduled
Partial	<input type="checkbox"/>
Estimated Duration	00:30  
Inspection Comments	<div></div>

**Inspection Resulting** – The system offers 3 result options: Pass, Fail & Conditional Pass. Any of these may be selected regardless of how the Compliance Items are resulted:


Fail

Conditional Pass


Pass

When any of these options are selected a window will appear that will allow for the following:

- Entering the Actual Date of the inspection should it be different than the default of Today's Date
- Adding a Comment – Any comment entered here will appear in the General Inspection Comments field after any comments input in that field previously.
- Changing the inspector of record if necessary
- Adding a Reinspection (see details below)

Fail Inspection 

Actual Date

Today 04/05/2016 

Start Time



08 : 00 AM

End Time

08 : 30 AM

Add a Comment (optional)

Inspector

Goetz, Johnny  

[Add a Reinspection >>](#)


Save


Cancel

**Adding a Reinspection** – If this feature was included on the Inspection Template during setup, users can add follow up reinspections during the inspection resulting process,

- Click the *Add a Reinspection* Link, as seen in the image above


- If you want to schedule an inspection immediately, select the date, time of day option, start and end time (if applicable) and Inspector. Click OK when finished. The inspection will then have a status of Scheduled and appear on the Inspector's Planner:

**Date** 04/05/2016 

**Time of Day** Specific Time 

**Start Time** 08 : 00 AM

**End Time** 08 : 30 AM


**Inspector** Goetz, Johnny 


- If you want to Create the inspection on the permit, and leave it in queue for future scheduling (i.e., waiting for a contractor to call for reinspection), click on the **X** in the inspector field, insuring the field is empty. Clicking the **OK** button will classify this inspection as Created. This inspection may then be scheduled at a later date:


**Create Reinspection**

11841 KITZBUHEL RD  
TRUCKEE, CA 96161

Goetz, Johnny

**Date** 05/02/2016 

**Time of Day** 

**Inspector** Select an Inspector... 

	7 AM	8 AM	9 AM	10 AM	11 AM

<

Here is an example of a search done for the reinspection that was just created from the filed inspection:

<b>11841 KITZBUHEL RD</b> TRUCKEE, CA 96161  Permit - Single Family Residence - 2014-00000752	301 - Ground Plumbing (Unassigned)
--	---------------------------------------

**Created**  
05/02/2016

**Reinspection**  
2016-00000188 .1 ▼

Note the inspection is now classified as a reinspection and the inspection number reflects the original inspection number with a (.1) added. The two inspections are now linked, as will be any subsequent reinspections.

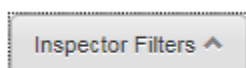
## INSPECTION SCHEDULER

*Community Development > Inspections > Inspections Scheduler*

The Inspection Scheduler View functions as a tool that allows for centralized scheduling for multiple inspectors. The scheduler uses the same elastic search functionality as the Inspection List/Search view, and allows for drag and drop scheduling for an unlimited number of inspectors. Great for comparing inspectors' schedules, this area allows for easy inspection rescheduling, resulting, moving an inspection from one inspector to another and parent detail viewing.

### Filtering the Inspector List

*Inspector Filters Dropdown* – Click on the **Inspector Filters** button to populate two fields that allow you to produce an Inspector list for scheduling:



*Inspector* – Placing your cursor into this field will populate the entire list of inspectors to choose from. Simply click on the inspector that needs to be added and the name will appear in the box. Note: The list will remain open so that users may easily click on all of the inspectors desired, without having to reopen the list. For extremely long lists, users may type a portion of the inspector's first or last name to filter the list. An unlimited number of inspectors may be selected:

- **Trades** – Placing your cursor in the Trades field will allow you to select all inspectors tied the trade(s) selected. This is a quick method of populating all of the inspectors in a particular department, for example. Below is a list of inspectors that populated by selecting the DPZ trade.

**Filter Options** – There are 4 selections that can be made regarding filters:

- **Save Filter** – Saves the filter selections for the user. The saved filter criteria will populate every time the user navigates to the Inspection Scheduler page.
- **Clear** – Removes any changes since the last filter Save or Apply.
- **Apply** – Changes your current filter options without changing your saved filter. The next time you navigate to the Inspection Scheduler, your saved filter will populate.
- **Cancel** – Closes the filter without making changes.

### Finding the Inspections You Want to Schedule

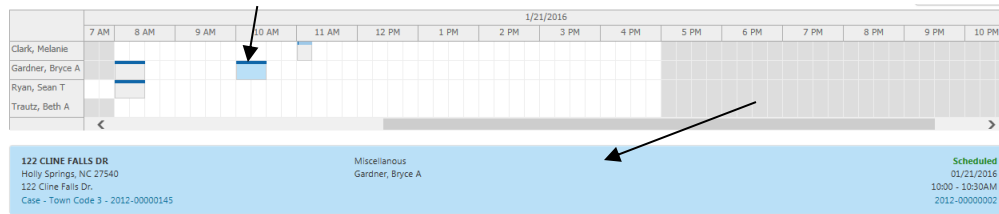
**Inspection Filters** – Similar to the Inspection List Search section of this manual, the left side of the Inspection Scheduler offers a Keyword Inspection search with various filters to help accomplish finding the Created, Requested, Past Due & Cancelled Appointment inspections that may need to be scheduled.

**Important:** Once your selection criteria in this search are made, you must click on the **Hide Inspection Filters** button at the top of the Left Pane to see your results:

Hide Inspection Filters

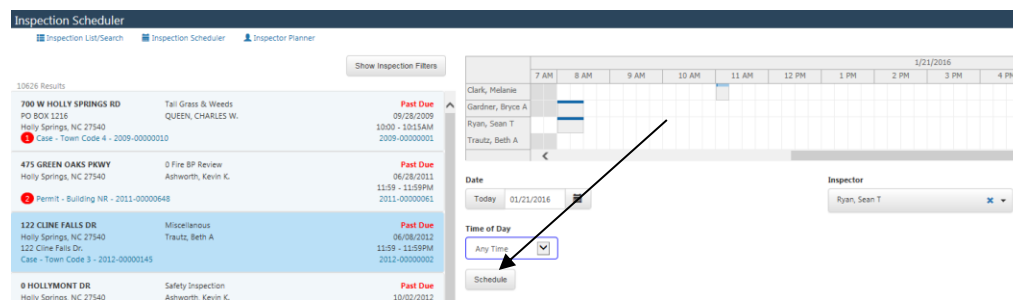
## SCHEDULING INSPECTIONS

To view the inspection card for a particular inspection, click the corresponding shaded area. The inspection card will appear in blue below the calendar, providing all the same information and links it provides on the Inspection List/Search page:



You may add an inspection to the calendar one of two ways:

- Use the fields below the calendar, selecting the *Date*, *Time of Day*, *Inspector*, *Start Time* and *End Time* and clicking the **Schedule** button. Use these fields, also, to reschedule an inspection already on the calendar: Click the inspection on the calendar. The inspection card will appear below the calendar. Make your selections in the date, time and inspector fields, and click **Schedule**:



- From your list of inspections in the left pane, click and drag the inspection to the desired place on the calendar. Any scheduling pre-conditions are verified and communicated. This method is convenient for scheduling a batch of inspections.

### Rescheduling from the Inspection Scheduler

There are two methods of rescheduling with the Inspection Scheduler:

**Drag & Drop** - This method is great for moving an inspection from one inspector to another on the same day. Simply hold LEFT + Click on the inspection block you'd like to move and drag it to another block on any of the visible inspectors' calendars

**Highlight & Change Inspection Criteria** – Once an inspection is highlighted on the inspection scheduler, the blue inspection card will appear and the Date, Inspector & Time of Day fields can be changed to reflect the rescheduling. Be sure to click on the **Schedule** button after the changes are made:

## RESULTING INSPECTIONS FROM THE INSPECTION SCHEDULER

To result inspections from the inspection schedule, highlight a schedule block on the calendar. This will populate the blue inspection card under the calendar. Click on the inspection number on the bottom right:

When the Inspection Details screen opens, click on the Results option

You have the option of managing your compliance item(s) individually, or resulting the inspection outright, without managing the compliance item(s).

### Compliance Item Resulting

*Pass, Fail or N/A* - Simply click on the appropriate box to indicate your selection. Note: resulting Compliance Items does not result the Inspection. The Compliance Items indicate which portions of the inspection passed, failed or were not applicable to that inspection:

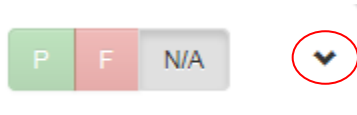
---

Note: Failing an inspection will automatically pass any Compliance Item that has not been resulted. Many users will therefore manage only the Compliance Items that have failed and allow the system to pass all others when they result the inspection.

---

### Adding Comments and/or Violations to a Compliance Item

- Click on the Chevron next to the Compliance Item Pass, Fail, N/A option:



- Click on the **Add Row** button:

Comments	Codes in Violation
<div>+ Add Row</div>	

- A box will open for both Comments and Codes. Select a prepopulated comment from the comments list (if created in setup) or type in your own unique comment. Select a code (if created in setup) from the Codes in Violation Box if desired.
- Repeat for all Compliance Items you wish to result. Be sure to click **Save** at the bottom of the page when finished:



*Inspection Comments* – Any general inspection comments can be entered in the inspection Comments field. Click **Save** when complete:

Status	Scheduled
Partial	<input type="checkbox"/>
Estimated Duration	<input type="text" value="00:30"/>
Inspection Comments	<input type="text"/>

**Inspection Results** – The system offers 3 result options: Pass, Fail & Conditional Pass. Any of these may be selected regardless of how the Compliance Items are resulted.



When any of these options are selected a window will appear that will allow for the following:

- Entering the Actual Date of the inspection should it be different than the default of Today's Date.
- Adding a Comment – Any comment entered here will appear in the General Inspection Comments field after any comments input in that field previously.
- Changing the inspector of record if necessary

- Adding a Reinspection (see details below)

### Adding a Reinspection

Note: If this feature was included on the Inspection Template during setup, users can add follow up reinspections during the inspection resulting process

Click the *Add a Reinspection* Link, as seen in the image above

If you want to schedule an inspection immediately, select the date, time of day option, start and end time (if applicable) and Inspector. Click OK when finished. The inspection will then have a status of Scheduled and appear on the Inspector's Planner:

If you want to Create the inspection on the permit, and leave it in queue for future scheduling (i.e., waiting for a contractor to call for reinspection), click on the **X** in the inspector field, insuring the field is



empty. Clicking the **OK** button will classify this inspection as Created. This inspection may then be scheduled at a later date:

### Create Reinspection

11841 KITZBUHEL RD  
TRUCKEE, CA 96161

Goetz, Johnny

Date

05/02/2016

Time of Day

Inspector

Select an inspector...

	7 AM	8 AM	9 AM	10 AM	11 AM

Here is an example of a search done for the reinspection that was just created from the filed inspection:

11841 KITZBUHEL RD  
TRUCKEE, CA 96161

301 - Ground Plumbing  
(Unassigned)

Permit - Single Family Residence - 2014-00000752

Created  
05/02/2016

Reinspection  
2016-00000188 .1

Note the inspection is now classified as a reinspection and the inspection number reflects the original inspection number with a (.1) added. The two inspections are now linked, as will be any subsequent reinspections.

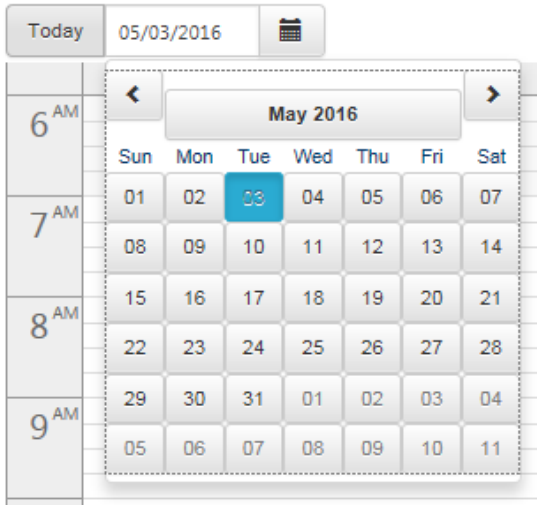
## INSPECTOR PLANNER

*Community Development > Inspections > Inspector Planner*

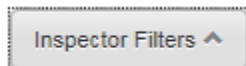
The Inspector Planner page provides inspectors with visual representations of what their workdays or weeks look like. While it can show the calendars for multiple inspectors, the primary design is to support an inspector who is logged into the system and quickly wants to view his or her workload. Although scheduling can be done from this area, this module is best for resulting and rescheduling inspections.

## Loading Data

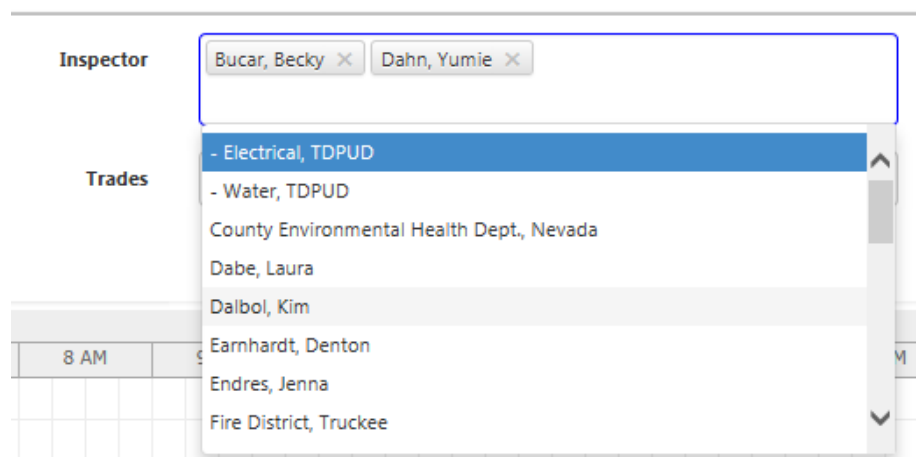
**Date Field** – Select the day you want to view. Today's date is the default. Click the **Today** button to switch back to today's date.



**Inspector Filters Dropdown** – Click on the **Inspector Filters** button to populate two fields that allow you to produce an Inspector list for scheduling:



**Inspector Field** – Placing your cursor into this field will populate the entire list of inspectors to choose from. Simply click on the inspector that needs to be added and the name will appear in the box. Note: The list will remain open so that users may easily click on all of the inspectors desired, without having to reopen the list. For extremely long lists, users may type a portion of the inspector's first or last name to filter the list. An unlimited number of inspectors may be selected:



**Trades Field** – Placing your cursor in the Trades field will allow you to select all inspectors tied the trade(s) selected. This is a quick method of populating all of the inspectors in a particular department, for example. Below is a list of inspectors that populated by selecting the DPZ trade:

---

<b>Inspector</b>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>Clark, Melanie ✕</span> <span>Gardner, Bryce A ✕</span> <span>Ryan, Sean T ✕</span> </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 5px;"> <span>Trautz, Beth A ✕</span> </div> </div>
<b>Trades</b>	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>DPZ ✕</span> </div> </div>

*Filter Options* – There are 4 selections that can be made regarding filters:

Save Filter

Clear

Apply

Cancel

- *Save Filter* – Saves the filter selections for the user. The saved filter criteria will populate every time the user navigates to the Inspection Scheduler page.
- *Clear* – Removes any changes since the last filter Save or Apply.
- *Apply* – Changes your current filter options without changing your saved filter. The next time you navigate to the Inspection Scheduler, your saved filter will populate.
- *Cancel* – Closes the filter without making changes.

## Planner Views

*Calendar View* – The default setting. Shows the inspections scheduled for one or more inspectors, based on the filters applied, in chronological order, in a calendar format.


### Views

Calendar

[Agenda](#)

[Map](#)

**Inspector Planner**

Today 05/03/2016  Save Schedule View: Week

		Brady, Joe
8 AM	Footing - Residential - 2015-00004427 7727 103RD AVE N Brooklyn Park, MN 55445	
9 AM	Foundation - Residential - 2015-00004428 10576 NOBLE CIR N Brooklyn Park, MN 55445	
10 AM	Framing - Residential - 2015-00004429 8140 GEORGIA CT N Brooklyn Park, MN 55445	
11 AM	Building Final - Residential - 2015-00004430 4071 SUNSET TER N Brooklyn Park, MN 55445	
12 PM		
1 PM	Footing - Residential - 2015-00004431 10105 NOBLE AVE N Brooklyn Park, MN 55445	
2 PM	Plumbing Final - Residential - 2015-00004434 10015 RUSSELL AVE N #6 Brooklyn Park, MN 55445	
3 PM	Plumbing Final - Residential - 2015-00004434 10015 RUSSELL AVE N #6 Brooklyn Park, MN 55445	
4 PM	CE Follow-Up Inspection - 2015-00004436	

#### Calendar features:

- Rearrange / Re-order the inspection sequence
- Access Right Click menus (Quick Pass, Inspection Details, Parent Details)
- Print Inspection Schedule Report
- Print Inspection Worksheets
- Print Inspection Results Report
- View a Daily Summary
- Create Inspections on the fly by clicking a timeslot
- Drag & Drop rescheduling
- Inspector Week View

**Agenda View** – This view offers a more linear presentation of an inspector's schedule, listing inspection cards in order of their occurrence in AM/PM sections.

#### Views

Calendar

**Agenda**

Map

Inspector Planner
Today 05/03/2016
Save Agenda

AM

<b>7727 103RD AVE N</b> Brooklyn Park, MN 55445 1 Permit - New Building Permit w PC - Res - 2014-00005898	Footing - Residential Brady, Joe
<b>10576 NOBLE CIR N</b> Brooklyn Park, MN 55445 2 Permit - New Building Permit w PC - Res - 2015-00000307	Foundation - Residential Brady, Joe
<b>8140 GEORGIA CT N</b> Brooklyn Park, MN 55445 1 Permit - Building Permit No PC - Res - 2015-00002832	Framing - Residential Brady, Joe
<b>4071 SUNSET TER N</b> Brooklyn Park, MN 55445 2 Permit - New Building Permit w PC - Res - 2015-00001831	Building Final - Residential Brady, Joe

PM

<b>10105 NOBLE AVE N</b> Brooklyn Park, MN 55445 1 Permit - Deck - Residential - 2015-00001502	Footing - Residential Brady, Joe
<b>7621 HAMPSHIRE AVE N</b> Brooklyn Park, MN 55445-82 1 Case - NUIS - 2015-00000979	CE Follow-Up Inspection Brady, Joe

## Agenda Features:

- Rearrange / Re-order the inspection sequence
- Access Right Click menus (Quick Pass, Inspection Details, Parent Details)
- Print Inspection Schedule Report
- Print Inspection Worksheets
- Print Inspection Results Report

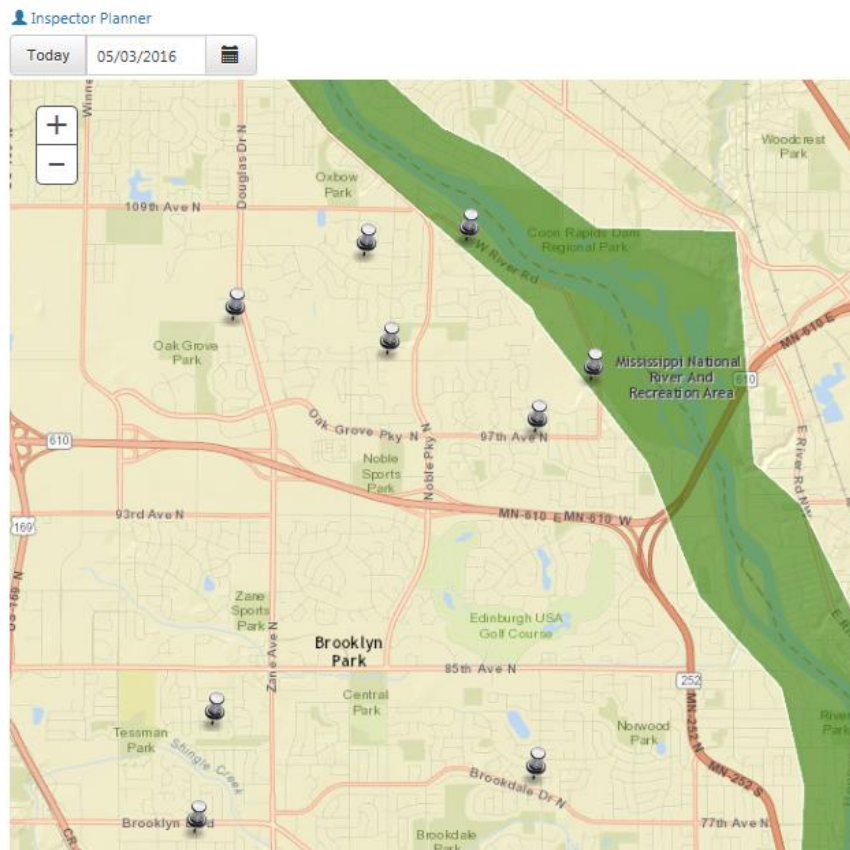
**Map View** – This view pinpoints your inspections on a map to let you determine the most efficient driving route. Note: A GIS configuration in Inspection Maintenance is required to utilize this feature:

## Views

Calendar

Agenda

Map

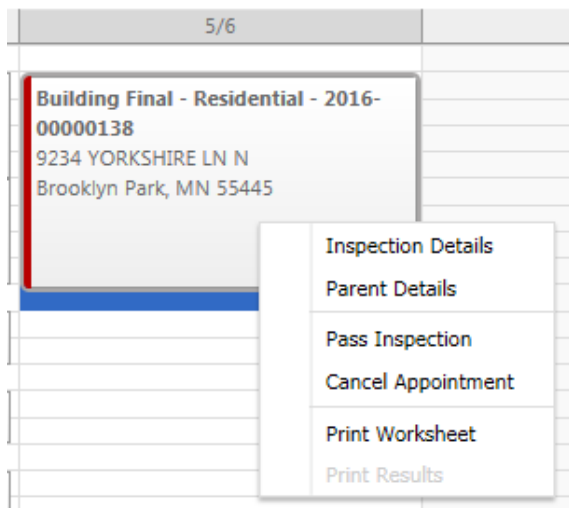


#### Map Features:

- Each inspection represented by a pin point on the map
- Pin colors differ by inspector
- Click on a pin to view inspection details, pass or cancel appointment
- (+ / -) feature allows for map zooming
- Map supports GIS layering for unique data view

#### Resulting Inspections from Calendar View

Right click on any inspection to access the following:



*Inspection Details* – As described above, this will open the inspection details page, giving the inspector the ability to result compliance items and the inspection.

*Parent Details* – Provides a pop up with the relevant parent details.

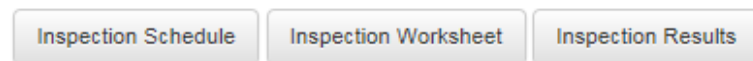
*Pass Inspection* – Allows the inspector to Quick Pass the inspection without comments.

*Cancel Appointment* – Ability to cancel the inspection and put it back in queue.

*Print Worksheet* – For inspectors that like something to write on when out in the field, this will produce a one page.

### **Printout Options in the Inspector Planner**

Three canned printout options are available in the planner view:



*Inspection Schedule* – Provides a one page “run sheet” detailing all of the inspector’s inspections for the day.

*Inspection Worksheet* – Provides one page per inspection highlighting the inspection details and giving the inspector space to take notes for each inspection.

*Inspection Results* – Provides a one page list of the inspections for the day including results and comments for each inspection.

## INSPECTION BILLING BATCHES

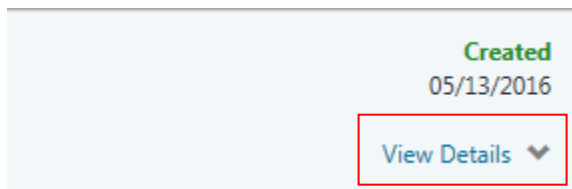
For users that are managing Citation Bills via Case Inspections, the system offers the ability to add Code Violation fees to the inspections. Subsequently, Inspection Billing Batches can then be created to gather all of the outstanding fees and send them to Miscellaneous Billing for invoice processing.

**Important:** Currently, only Case Inspections can accommodate the adding of fees. Permit, License, Business and Location inspections are not compatible with the Inspection Billing process.

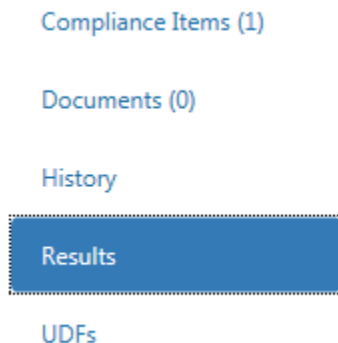
### Adding Code Violation Fees to a Case Inspection

Access the Inspection Details screen for any case inspection. One way to do this would be to search for Created or Scheduled inspections linked to Cases in the Inspection List/Search view (See pg. 34)

When you've found your inspection click on the *View Details* link:



Click on the Results Tab:



Manage your Compliance items as described previously:

A screenshot of a web form titled 'CE Proactive Inspection Photo'. At the top, there are three buttons labeled 'P', 'F', and 'N/A', with 'F' (Fail) being the active selection. To the right of these buttons is a search icon and a dropdown arrow. Below this is a text field containing '2012 ICC / M301.3 / C/E - Vacant Structures and Land'. The form is divided into two main sections: 'Codes in Violation' on the left and 'Comments' on the right. The 'Codes in Violation' section contains a dropdown menu with the same text as the field above, and an 'Add Row' button below it. The 'Comments' section contains a text area with the text 'Vacant structure not sound'.

To add fees you will need to either Fail or Conditionally Pass the Inspection. The Issue a Citation option will not populate for a Passing inspection:





Click on the Issue a Citation checkbox:

☒ Issue a Citation

Select a customer to be billed. You may type any part of the customer name to pare down the list. Note: If this is a first time customer, the customer will need to be added to the Miscellaneous Billing customer list. Please consult with a representative of your Finance Department for instructions and security access to this area of the software:

☒ Issue a Citation

Select Customer to be Billed

1000 - LENART, VU V

Select the Fee(s) to be included with this Citation Billing by clicking inside of the *Select Fees to be Included* field. Note: The fees that populate here are fees that have been specifically classified as Code Violation fees in the Community Development fee list.

*Maintenance > Community Development > Fees*

Please see your Community Development Fees administrator for questions regarding the creation of Code Violation fees.

Once your Fees have been selected click **Save**.

The fee will be stored in the background until an Inspection Billing Batch is created.

## STOP WORK

As of Version 9.5C, the new world ERP platform offers the ability to place a Stop Work on a Parcel or a Permit. (Note: The ability to place a Stop Work on an individual contractor will be available in the 9.6C release, May of 2017. We will update this guide appropriately). Stop Work will give users the ability to place a warn or a block on specific items within the parcel or permit. Notifications can also be configured to communicate with necessary parties to the stop work.

## TIPS AND TRICKS

1. Use List/Search and Scheduler to quickly see inspections requested from ePermits – The “Requested” inspection status is exclusive to ePermit requests. The “Created” inspection status now represents inspections selected during the permit creation process.
2. Use List/Search to search for Past Due Inspections. Great for deciphering why past inspections were not resulted timely.

3. Use the Inspection Schedule report in the Planner to produce an easy to use “Run Sheet” for the day. Great for inspectors without technology in their vehicles.
4. Use the Quick Pass option in List/Search to pass multiple inspections at once. A great time saver
5. Inspections can be created “on the fly” in all three views. Use the **Create** button in the List/Search or click on a time slot in the Scheduler & Planner.
6. Inspections may be tied to a location now. Great for “Courtesy” inspections that involve an address only.
7. Use Trades in your Inspector filters in the Scheduler and Planner to populate the schedules for the inspectors in an entire department.
8. Use the chevron under the date range in the List/Search & Scheduler to populate shortcuts for selecting (or clearing) unique date ranges.