



# **PDspect**

INSPECTION SOFTWARE

Step by Step

## **How To**

## **Add a Category**

*This How To article explains how to add a category.*

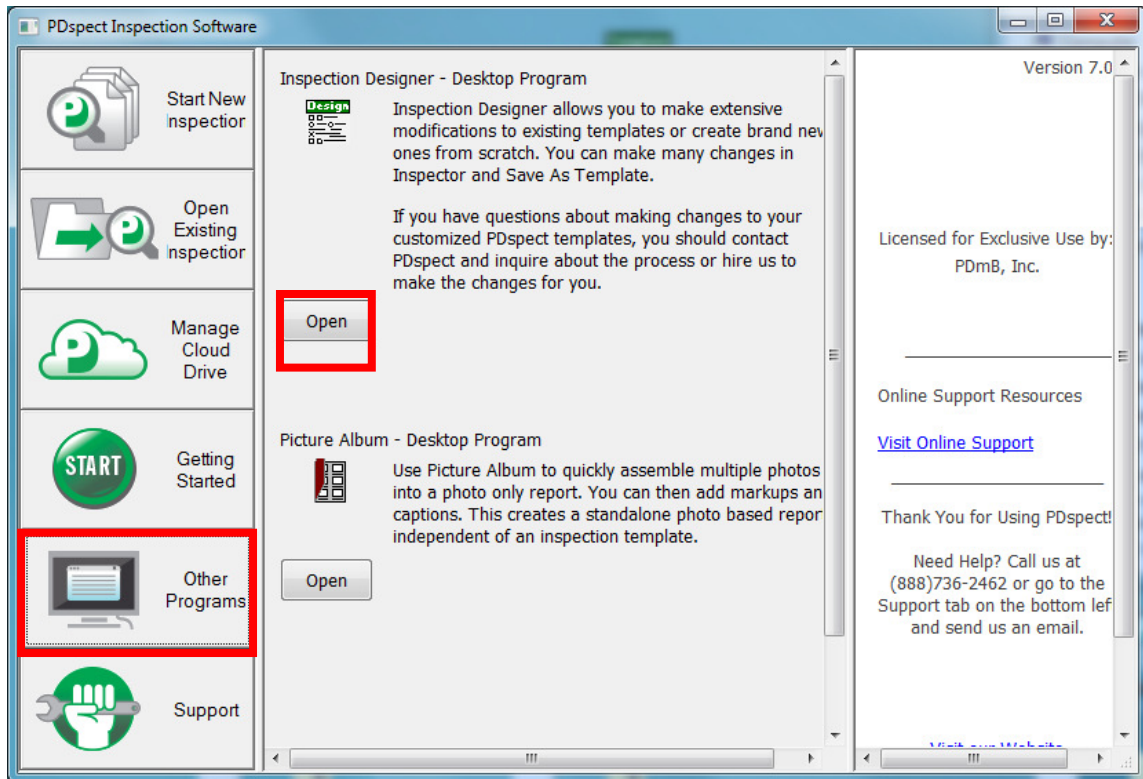
For a complete list of available How To documents visit the  
Support section of our website: <http://www.pdspect.com/support/index.php>

# HOW TO: ADD A CATEGORY

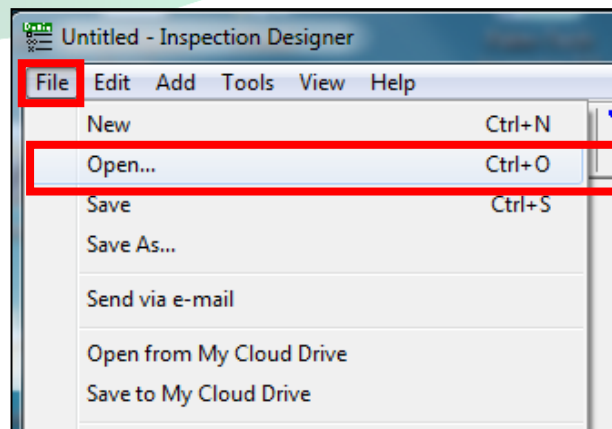
This document will show how to add a category to your inspection reports. There are two different methods for adding a new category. The first is adding it directly to the template in Inspection Designer. The second is adding it to an inspection report in PDspect Inspector.

## Adding a Category to a Template

1. First, open your PDspect icon and then select Inspection Designer under the 'Other Programs' tab.

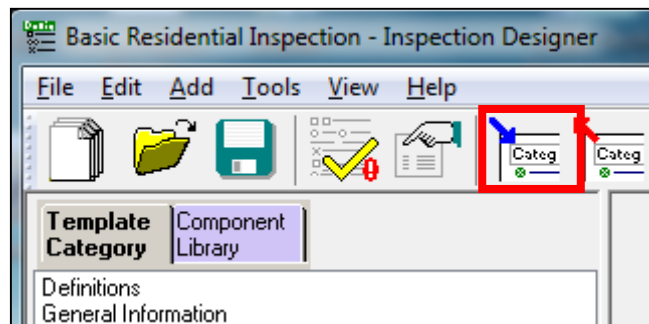


2. Next open the template that you want to modify by going to File->Open. Click on the template you want to change, and once it is highlighted click on OK.

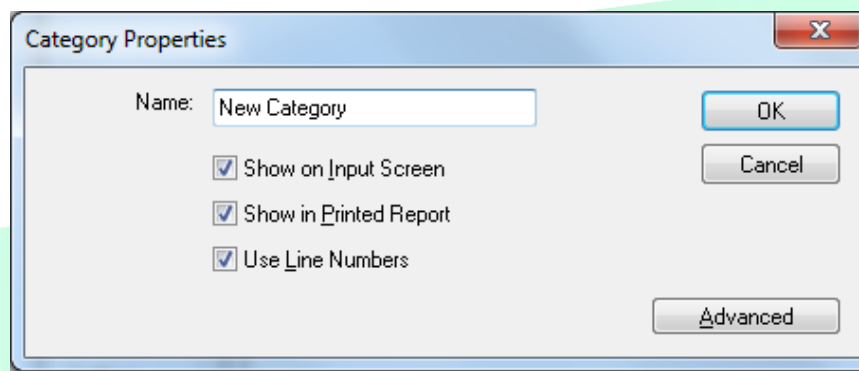


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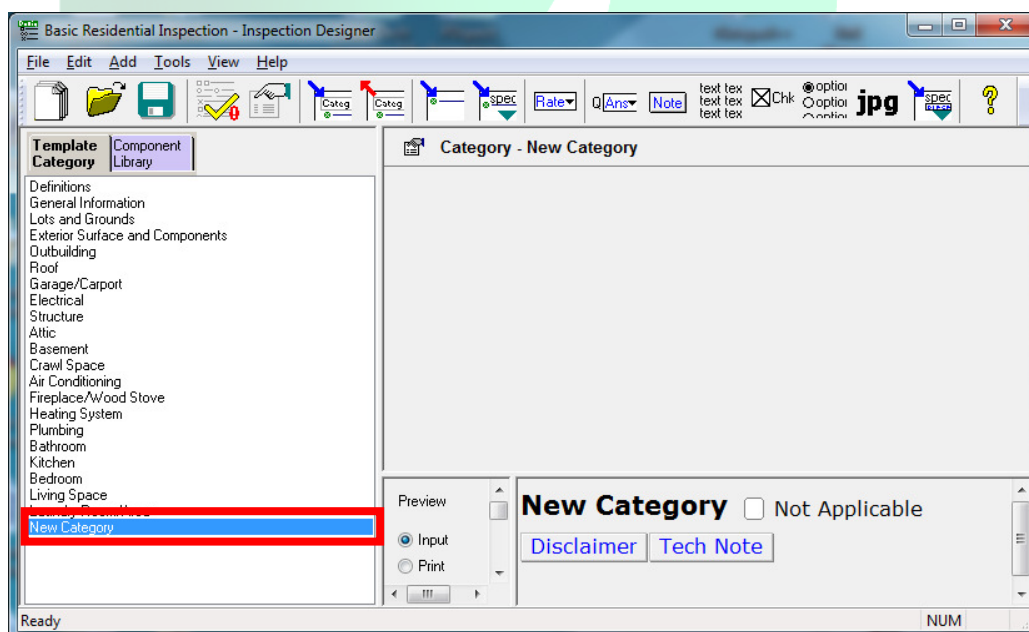
3. To add in a new category, click on the 'Add Category' button from the toolbar.



4. Next, the Category Properties window appears. This is where you give your new category a name. Let's name it 'New Category'



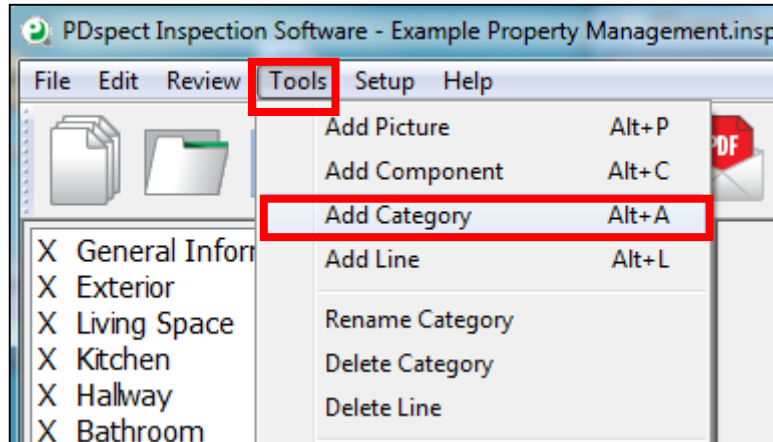
5. Click OK when finished.
6. Your new category now shows up on the left hand side of the category list. From here you can add in new lines as needed. For more information on this, see the How To on Adding Lines.



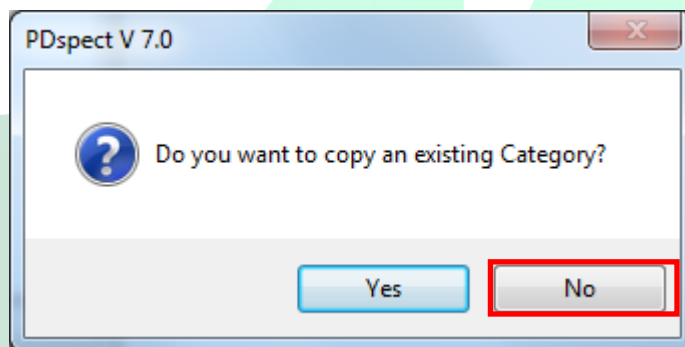
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## Adding a Category to a Report

1. If you an inspection open you can add a new category to it by going to Tools>Add Category.



2. Next, you will be prompted with the following question 'Do you want to copy an existing category?'. If you click on 'Yes' you will be able to make an exact copy of an existing category. If you select 'No' you will be able to add in a new, blank category. Click on 'No'.

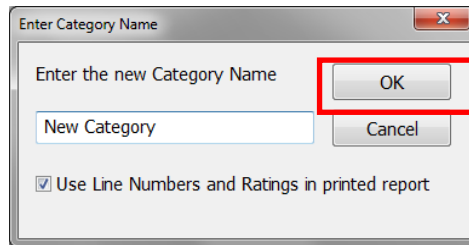


3. Next you can enter the new category's name. For this example we'll call it 'New Category'. Notice there is a box at the bottom to use line numbers and ratings in the new category. If you are adding a category that will not have any ratings in it then you will most likely want to uncheck this box. For this example, we'll leave it checked.

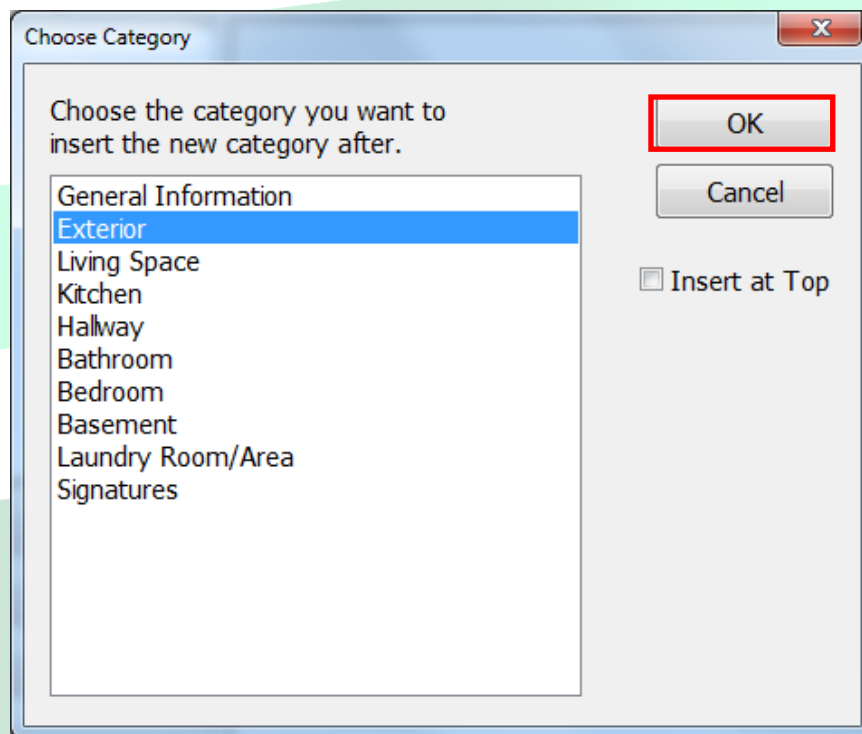
## HOW TO: ADD A CATEGORY

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4. Click on 'OK' when finished.



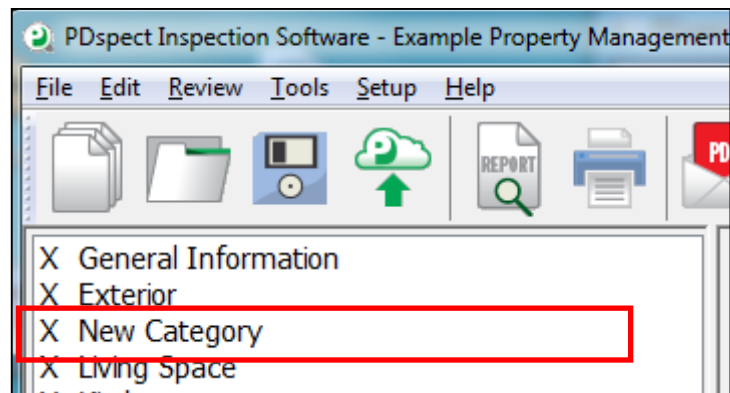
5. Now pick where you want the new category to show in the category list. Click on the category you want the new category to appear after (or click on 'Insert at Top'). Click 'OK' when finished.



## HOW TO: ADD A CATEGORY

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- The category has now been added. From here you can add in new lines and components to set the category up with the exact information that you want.



- By going to Tools->Save as Template you can create a new version of your template that includes the new category(s) that you added in. This makes it so that if you want this to be a permanent change you only have to walk through the process one time.