



PDspect

INSPECTION SOFTWARE

Step by Step

How To

Add a Line

This How To article explains how to add a new line.

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 LINE

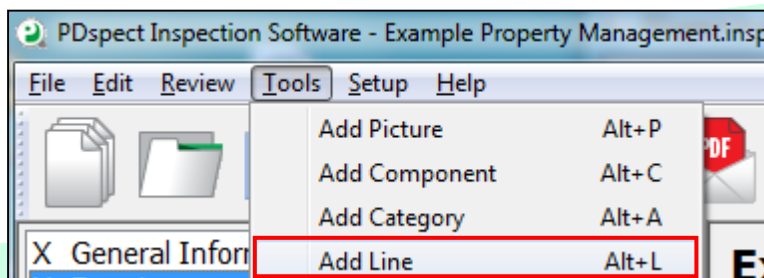
This document will show you how to add new lines into your inspection reports. It will show the steps for adding a new line for an individual inspection, as well as, how to add a line to a template and make it a permanent change.

Add a Line to one Report

There are two ways to add a new line into a report. This How To will cover both methods which are: (1) Go to Tools->Add Line (2) You can copy/paste/rename an existing line

Let's look at the Tools->Add Line method first:

1. First, go to Tools in the menu bar and click on 'Add Line'.



2. The 'Add Line' window will appear. Click on the 'Type:' dropdown to pick what type of line you want to add in. The different line types to choose from are below:

NOTE: The most commonly used line types are the '1 Question/Answer' and 'Rating, Prompt, Note'. Also, not all line types are compatible with the app. (For more information check out the line types and what lines work on the app how tos)

- 1 Question/Answer
- 2 Question/Answer
- 3 Question/Answer
- Yes/No
- Standalone Note
- Checkboxes
- Option List
- Text
- Page Break
- Signature Line
- Rating, Prompt, Note

HOW TO: ADD A LINE

- Once you select the type of line you want it add in, you'll be able to give specific properties to that line. For this example we are going to select a '1 Question/Answer' line.
- With this line type we need to give the new line a name in the 'Screen Prompt'. We also need to decide if we want a Rating and/or a Note to show up on the line by checking/unchecking the boxes in the lower left corner. The last thing to decide is where you want the line to show up in the line order. You decide this by selecting the line in the right column that you want the new line to show up after.

The screenshot shows the 'Add Line' dialog box with the following details:

- Type:** 1 Question/Answer
- Screen Prompt:** 1: New Line Item
- Print Prompt (only if different from screen):**
- Show Rating:**
- Show Note:**
- Insert List:** Rating Key, Driveway:, Walks:, Lawn, Trees, and Shrubs:, Windows:, Entry Doors:, Fences/Gates:, Garage:, **Roof:**, Page Break
- Buttons:** OK, Cancel

- Once you've entered the information as you want, simply click on 'OK' and the new line will be added in.

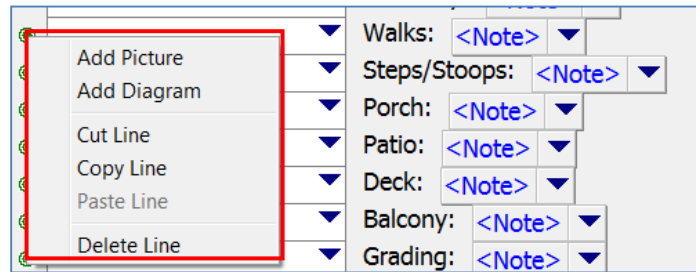
Now, let's look at the Copy and Paste method.

- This method works great if you have a line already in your report that you want in a different category. It should only be used to duplicate a line, and not create a new one.
- The first step is to right click on the circle on the left of the line you want to copy.

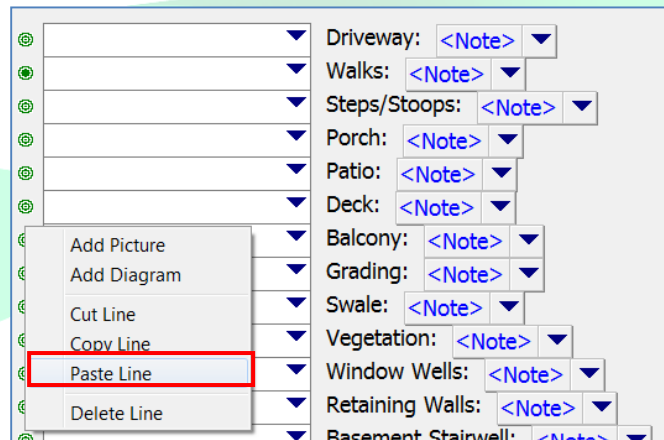


HOW TO: ADD A LINE

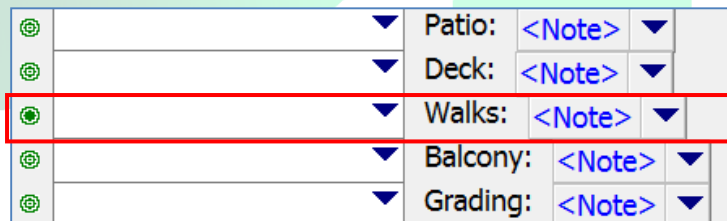
- When you right click, several options will appear. Click on 'Copy Line'



- Next, you want to right click on the circle to the left of the line that you want the newly added in line to be above and then select 'Paste Line'.



- A copy of the line will now be inserted.



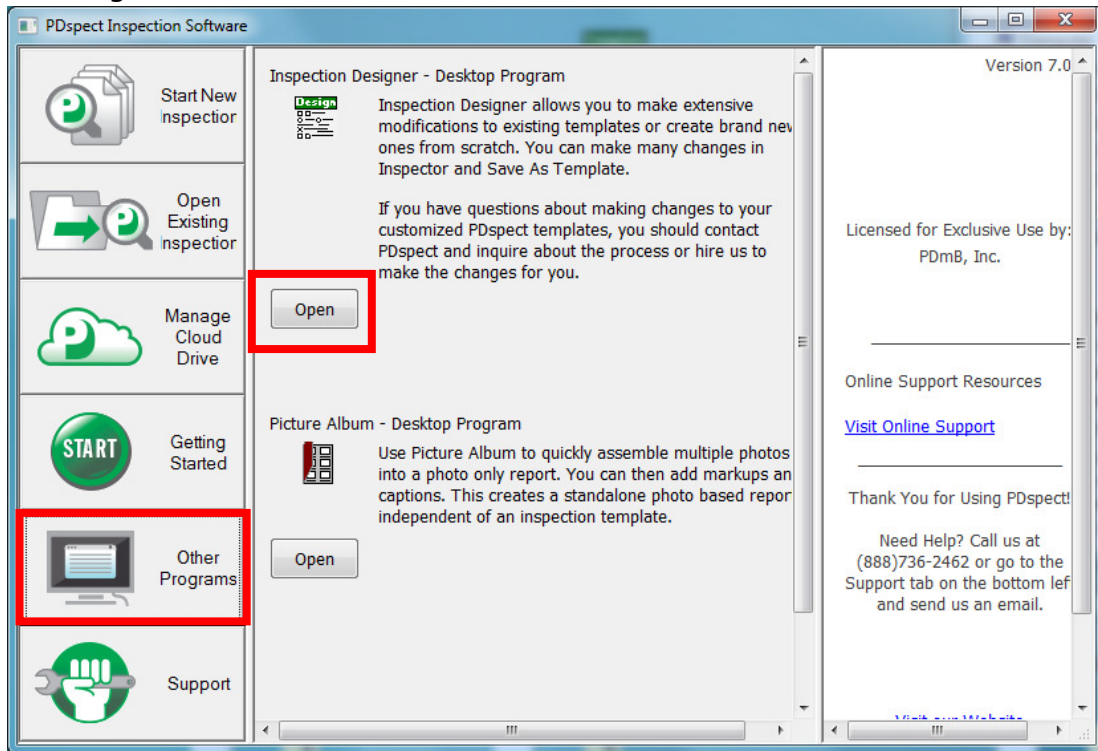
To make the change permanent you can save a new copy of your template by going to Tools->Save As Template. You will then be able to give a new name to the template that has the changes you made to the inspection that is open.

HOW TO: ADD A LINE

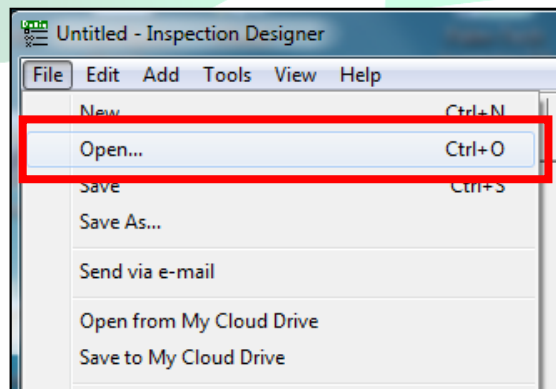
Adding a Line to a Template

There are two different ways to add a line to a template in Inspection Designer. One is copying and pasting a line to duplicate it in a report. The second is to add a whole line from scratch.

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



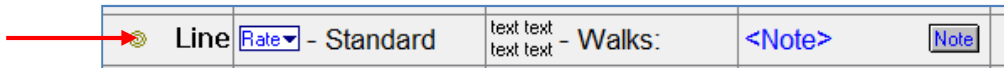
2. Next, open the template that you want to modify by going to File->Open. Click on the template you want to change, and once it is highlighted click on OK.



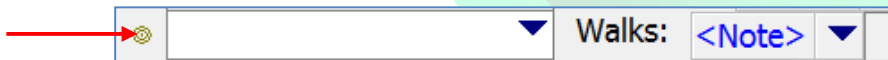
HOW TO: ADD A LINE

- Next, go to the category that contains the line you want to add.
- You can add the same line to a different category by using the Copy and Paste method shown on pages 2 and 3 of this document. You can use this method on either the Work Area (top half of the screen) or the Preview Area (bottom half of the screen). **(Note: This method is could for modifying components, and should only be used to duplicate a line.)**

Work Area

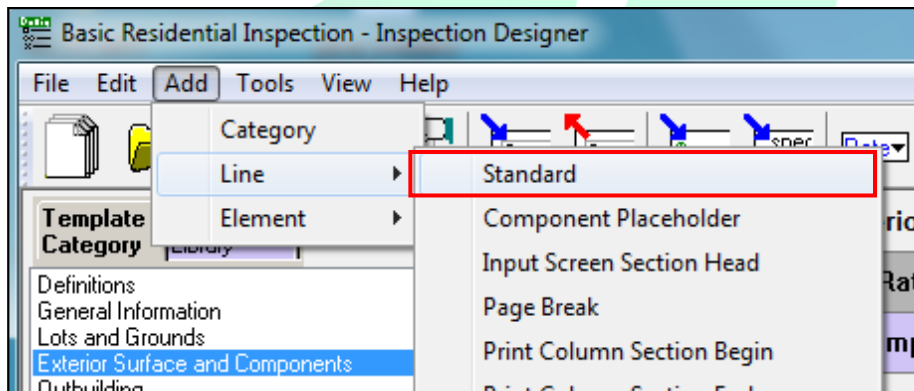


Preview Area



You can also add in a new line by adding in a blank line and then adding the desired individual pieces to it.

- The first step for this is to add in a new, standard line. To do this go to Add->Line->Standard.



- Next a screen appears for 'Line Properties'. Click 'OK'

HOW TO: ADD A LINE

7. You'll now see a new, empty line is added into your Work Area.

☉	Line	Rate - Standard	text text text text	Fences:	<Note>	Note
☉	Line	Rate - Standard	text text text text	Lawn Sprinkle	<Note>	Note
☉	Line					
☉	Line					

8. Now that the line is added in, you need to decide what individual pieces you want to add in for the line. You can choose from a: Rating, Text, Note, Checkboxes, Option Lists and more to build the line how you want. To add in new pieces, you can either select them from the Tool Bar or by going to Add->Element and select the piece you want to add in.

NOTE: Only certain line formats are supported with the PDspect app. If you want to create a new line that is outside of the standard format it may not show up on the app.

9. The line will now be added in to this template and the last step is to save the change. To save the template, go to File-> Save. If you wanted to create a new template that included the change you can do this by going to File -> Save As and giving the template a new template name.