



PDspect

INSPECTION SOFTWARE

Step by Step

How To

Rearrange Categories

This How To article explains how to rearrange the order of categories.

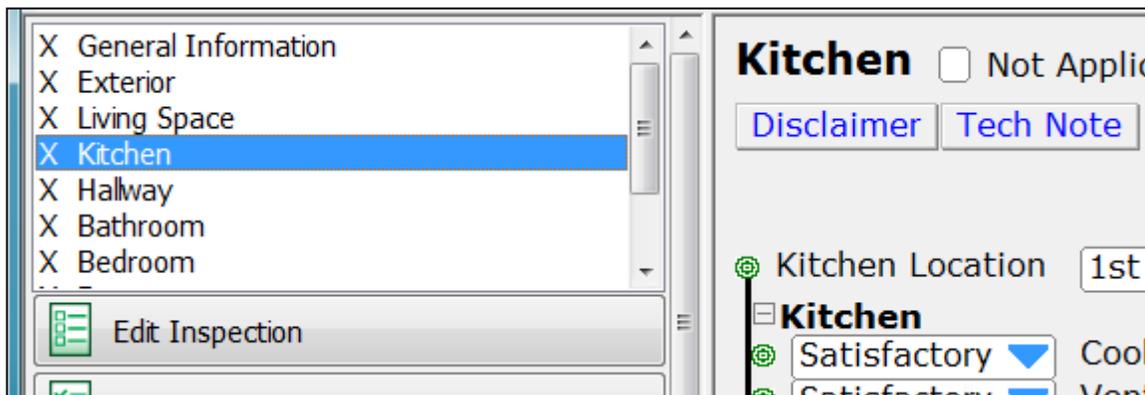
For a complete list of available How To documents visit the Support section of our website: <http://www.pdspect.com/support/index.php>

HOW TO: REARRANGE CATEGORIES

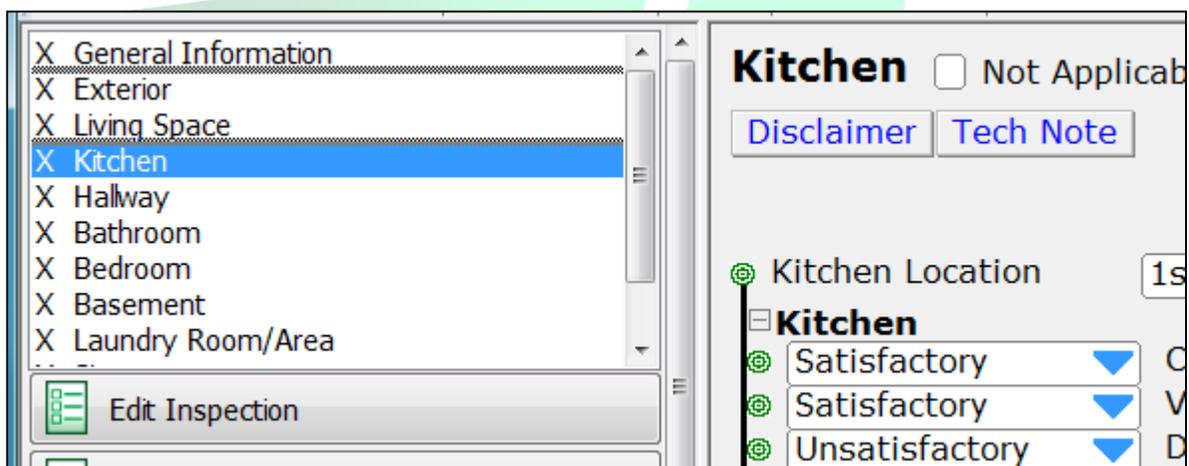
This Document will show you how to rearrange the order of categories in your inspection reports. It will show the steps for rearranging categories for an individual inspection, as well as, how to rearrange categories in a template to make it a permanent change.

Rearranging Categories in one Report

1. To change the order of Categories, simply click and hold on the category you want to move up or down in the Choose Category list on the left. Let's say we want to move the Roof category up to be below Lots and Grounds.

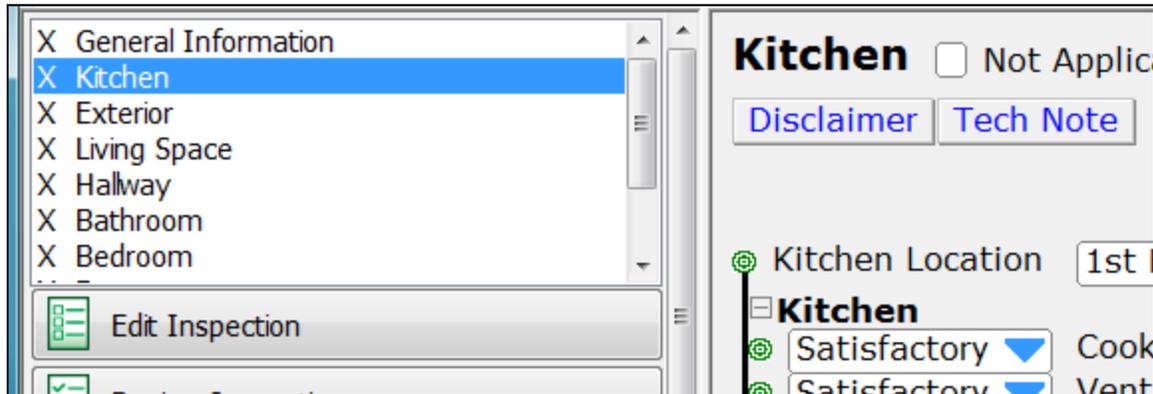


2. Next, (while still holding the left click on your mouse down) move your mouse to drag and drop the category to the new position you want it to be in. As you are doing this, you'll see a gray line indicating where the category will be moved to once you let go of the mouse button.



HOW TO: REARRANGE CATEGORIES

3. Once you let go of the mouse the category will be moved to the desired position.

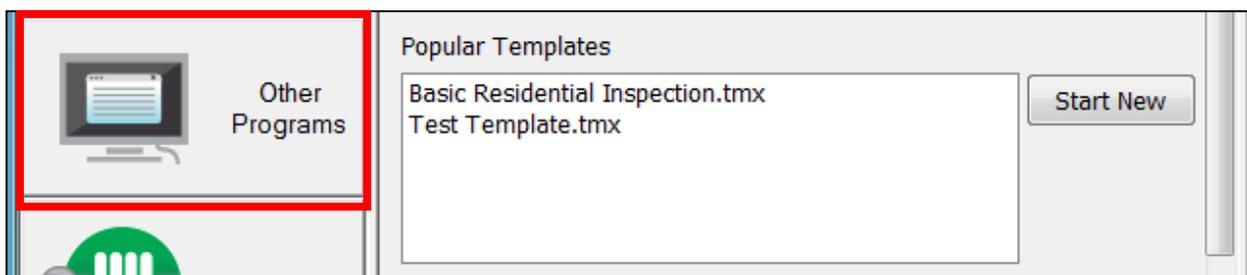


To make the change permanent you can save a new copy of your template by going to Tools->Save As Template. You will then be able to give a new name(or the same name if you want to overwrite what you already have) to the template that has the changes you made to the inspection that is open.

Rearranging Categories in a Template

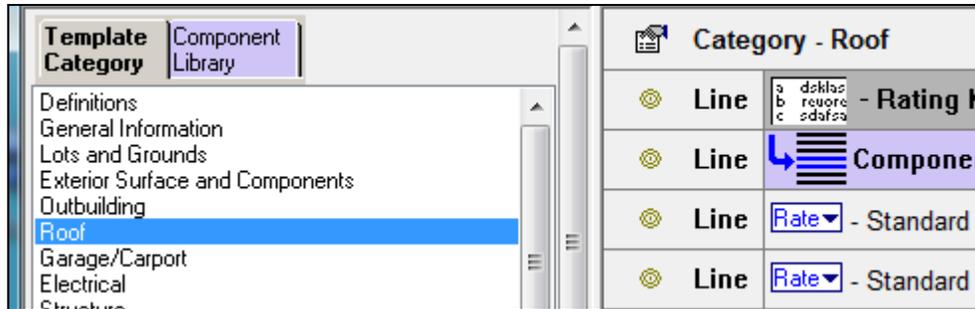
There are two different ways to rearrange categories in a template. The first method is from within the PDspect Inspector program. You can rearrange the order of categories by following the steps outlined on page 2-3 of this document. To make the change permanent you can save a new copy of your template 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. The second method for rearranging categories in a template is done in Inspection Designer and the steps are below:

1. First, open your PDspect icon and then select 'Other Program' to open up Inspection Designer.

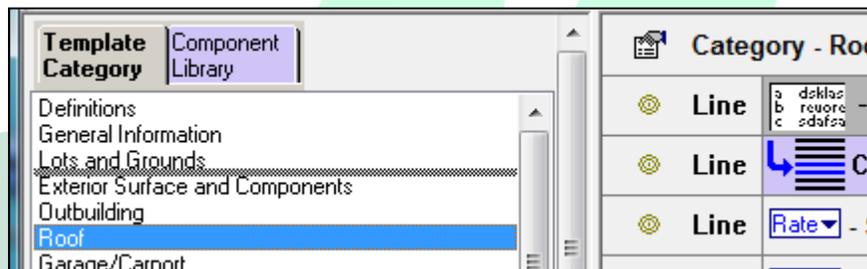


HOW TO: REARRANGE CATEGORIES

- Next you need to open the template file 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.
- To change the order of Categories, simply click and hold on the category you want to move up or down in the Choose Category list on the left. Let's say we want to move the Roof category up to be below Lots and Grounds.



- Next, (while still holding the left click on your mouse down) move your mouse to drag and drop the category to the new position you want it to be in. As you are doing this, you'll see a gray line indicating where the category will be moved to once you let go of the mouse button.



- Once you let go of the mouse the category will be moved to the desired position.



- The category will now be moved to the desired position 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.