



# **PDspect**

INSPECTION SOFTWARE

Step by Step

## **How To**

## **Edit Rating Sets**

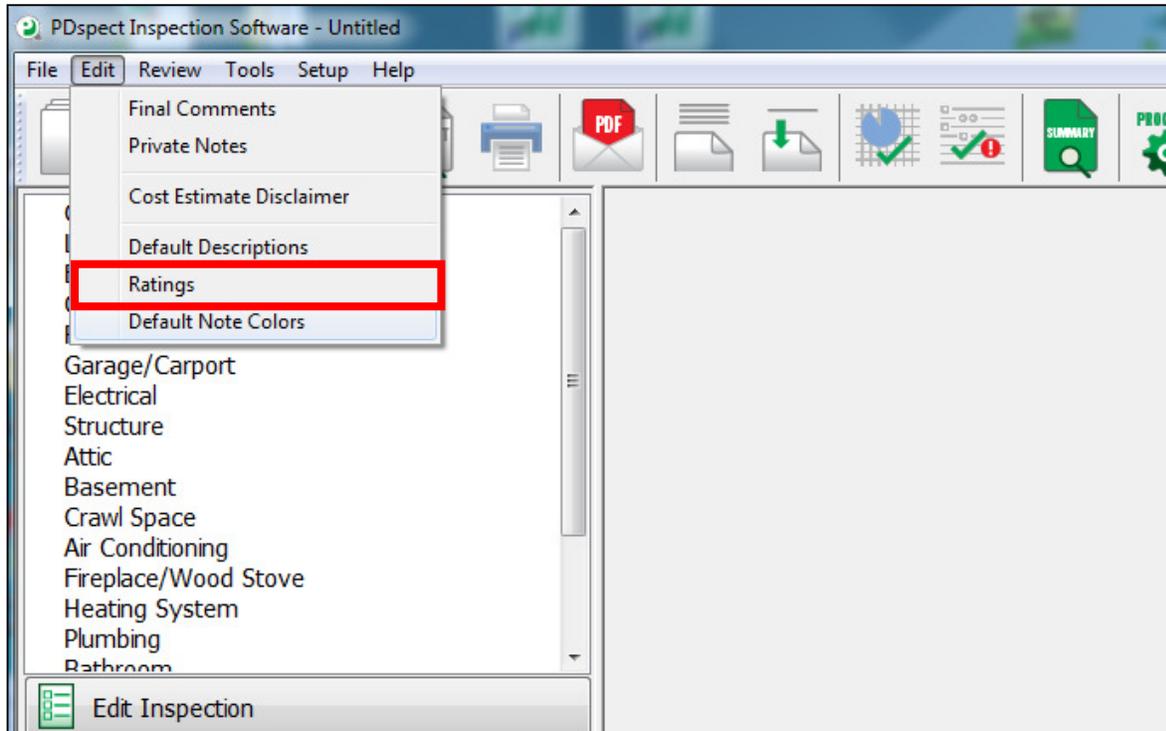
*This How To article explains how to edit rating sets.*

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

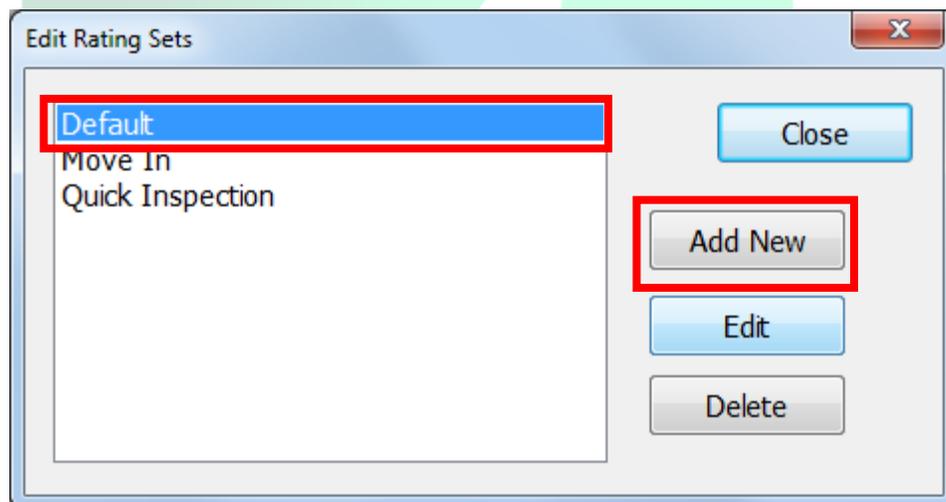
# HOW TO: EDIT RATING SETS

This document will show you how to customize your ratings by adding, deleting, renaming, and editing the default ratings properties.

1. With an inspection open, click 'Edit' -> Ratings.



2. The 'Edit Rating Sets' box will appear like below. Highlight the rating set you want to make changes to and then click 'Edit'. For this example we'll make changes to the 'Default' rating set.



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- The 'Edit Rating Set' box will appear like below. Here you will see all of the settings for the Default Ratings. The ratings are listed on the left side of the box. To edit a Rating, highlight it on the left and all of its properties will show up on the right. You can then edit these properties for the selected rating.

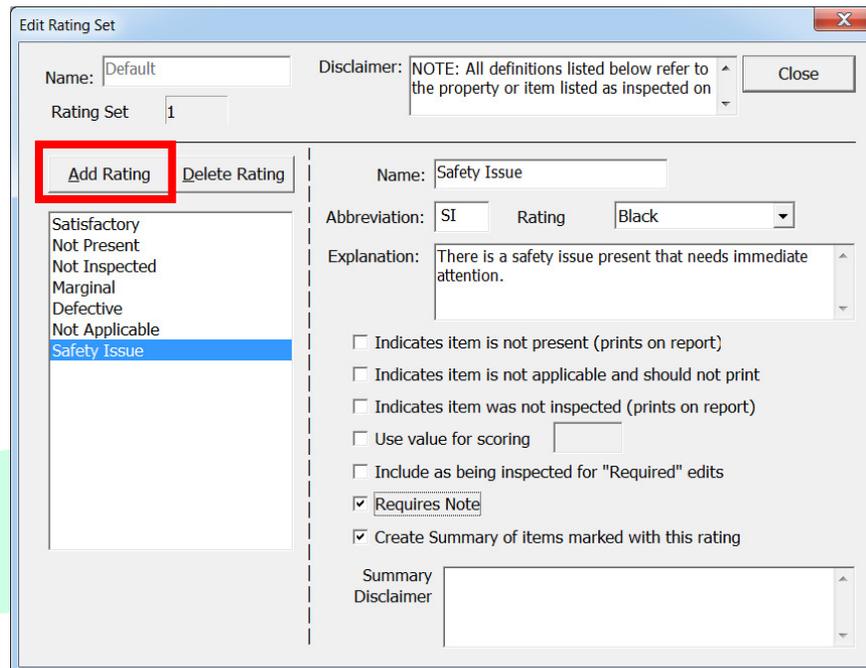
The screenshot shows the 'Edit Rating Set' dialog box. At the top, there are fields for 'Name: Default' and 'Rating Set ID: 1'. A disclaimer reads: 'NOTE: All definitions listed below refer to the property or item listed as'. A 'Close' button is in the top right. Below this, there are 'Add Rating' and 'Delete Rating' buttons. On the left, a list of ratings is shown: 'Acceptable' (highlighted in blue), 'Not Present', 'Not Inspected', 'Marginal', 'Defective', and 'Not Applicable'. On the right, the properties for the selected 'Acceptable' rating are displayed: 'Name: Acceptable', 'Abbreviation: A', 'Rating: Black', and 'Explanation: Functional with no obvious signs of defect.'. Below these are several checkboxes: 'Indicates item is not present (prints on report)', 'Indicates item is not applicable and should not print', 'Indicates item was not inspected (prints on report)', 'Use value for scoring' (with a text input field), 'Include as being inspected for "Required" edits' (checked), 'Requires Note', and 'Create Summary of items marked with this rating'. At the bottom, there are fields for 'Summary' and 'Disclaimer'.

- Let's say we want to change the 'Acceptable' rating to 'Satisfactory'. To do this, we'll highlight 'Acceptable' on the left and then type 'Satisfactory' in the Name field on the right. We'll also change the abbreviation to 'S'.

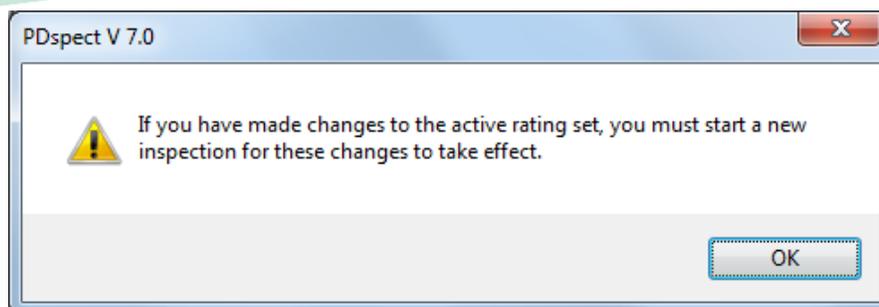
This screenshot shows the 'Edit Rating Set' dialog box after editing. The 'Name' field now contains 'Satisfactory' and the 'Abbreviation' field contains 'S'. The 'Rating' dropdown is still set to 'Black'. The 'Explanation' remains 'Functional with no obvious signs of defect.'. The checkboxes are the same as in the previous screenshot, with 'Include as being inspected for "Required" edits' still checked. The 'Summary' and 'Disclaimer' fields are empty.

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- Now let's say we want to add in a new rating. To do this, we'll click 'Add Rating' on the left. For this example we'll add a new rating for 'Safety Issue'. After we click 'Add Rating', we are going to type 'Safety Issue' into the Name field. We'll also make the abbreviation 'SI'. In the explanation field we'll type a brief explanation about the rating. Finally, we'll check the boxes for 'Requires Note' and 'Create Summary of items marked with this rating'.



- You can also rearrange the order of the ratings into the order you prefer. This is done by clicking on the rating on the left and dragging and dropping it to your desired location.
- When you are finished with your changes click 'Close' and then 'Close' again. A message will pop up informing you that you must start a new inspection for your changes to show up. Therefore, the ratings for your current inspection and past inspections will not change. Click 'OK'.



- The next time you start a new inspection your changes will be there.

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### Here is a breakdown of what each option available on the 'Edit Rating Set' screen does:

- a. Name – This is the name of the rating. To change it, simply click in the box and make the change.
- b. Abbreviation – This is the rating abbreviation. If your ratings are set to show as checkboxes on the printed report, this is what will show up above the checkboxes to distinguish between ratings.
- c. Rating Color – This is the color that you want notes to appear in for lines that are marked with this rating.
- d. Explanation – This is the text that will appear in the definitions section of the report defining what a particular rating means.
- e. Indicates item is not present – This option is checked for the Not Present rating.
- f. Indicates item is not applicable and should not print – This option is checked for the Not Applicable rating. It makes it so that lines marked with this rating will not show on the printed report.
- g. Indicates item was not inspected – This option is checked for the Not Inspected rating.
- h. Use value for scoring – This option should only be selected if you are setting up your template to calculate an inspection score.
- i. Include as being inspected for 'Required' edits – This option is used for completeness checks and edit checks. If a rating is used on a line that has this option checked, then no additional information will need to be filled out for the line to be considered 'complete'.
- j. Requires Note – Check this item if you don't want a line marked with this rating to be considered complete unless a note is entered.
- k. Create Summary of items marked with this rating – If this is checked, then a summary will be created for all items marked with the given rating.
- l. Summary Disclaimer – This is the text that will show up at the top of the summary created for the given rating