



PMWeb Inspections

Version 7.1 and Higher

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Introduction

With PMWeb Inspections you can assess the state of anything you want to, using criteria that you define yourself. Interactive inspection points can be placed on images if you wish, and you can use an inspection to automatically generate Work Requests, Work Orders, Initiatives, and Projects.

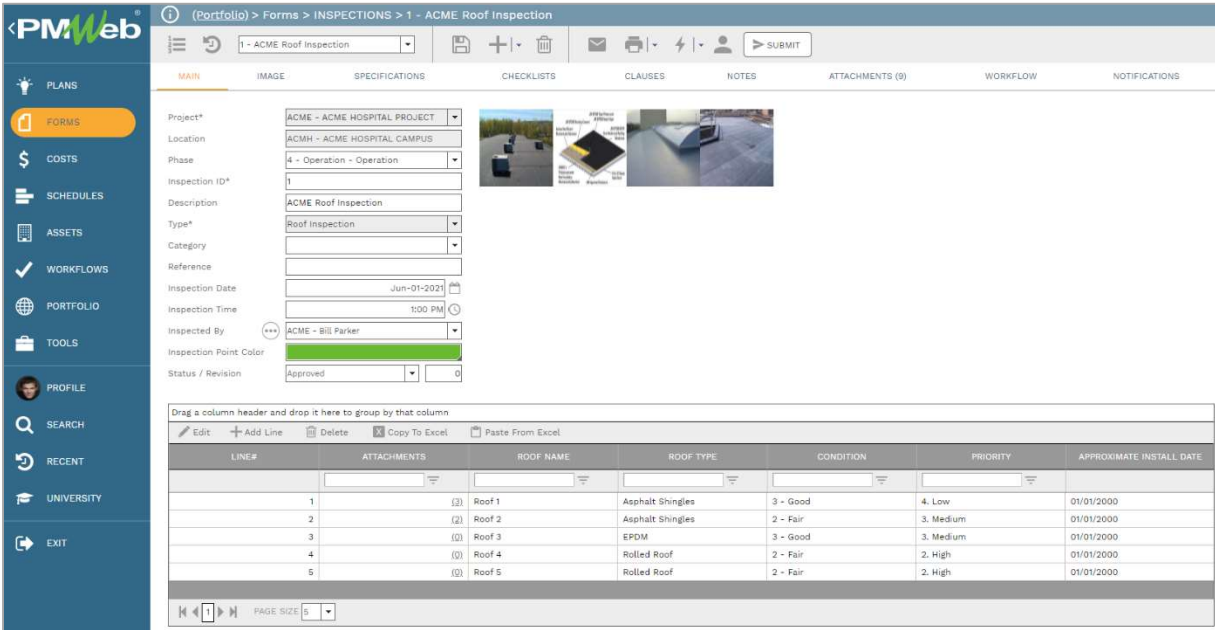


Figure 1 - A PMWeb Inspection Record

Inspection points can be entered in table form, or as overlays on an image.

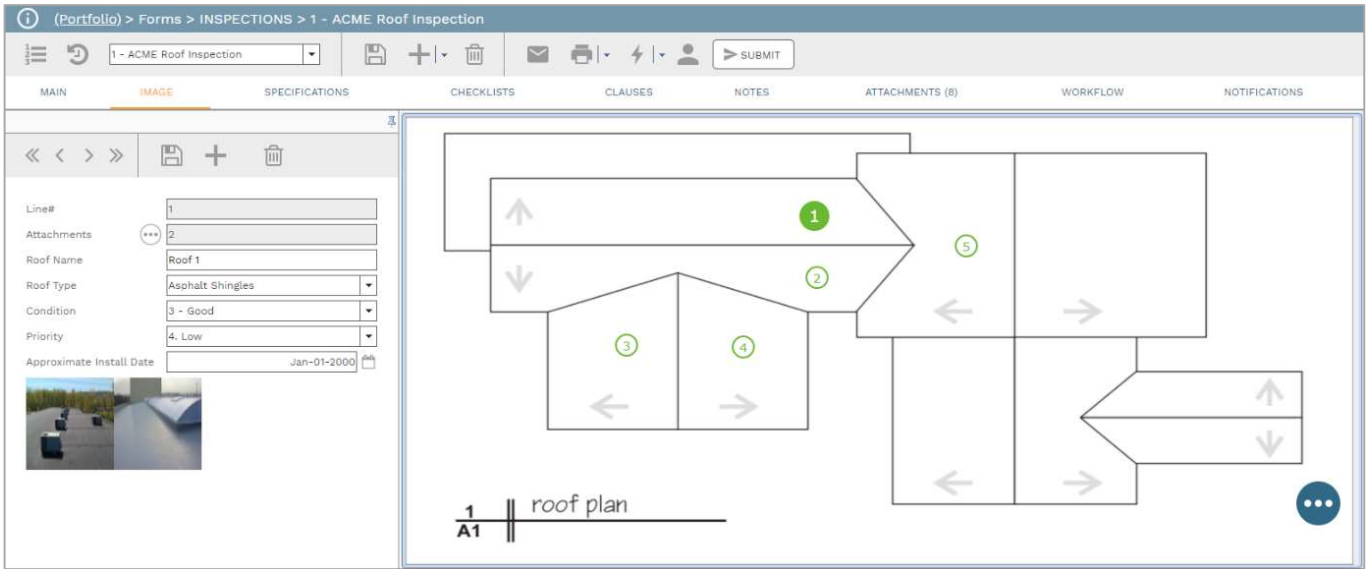


Figure 2 – Inspection Points on an Image

Inspections are part of the PMWeb Forms module. Before creating Inspection records you must first define at least one Inspection Type.

Inspection Types

Using Inspection Types, you define what criteria, or questions, each inspection point will contain. Inspection Types can contain an unlimited number of questions, and you select a data type for each.

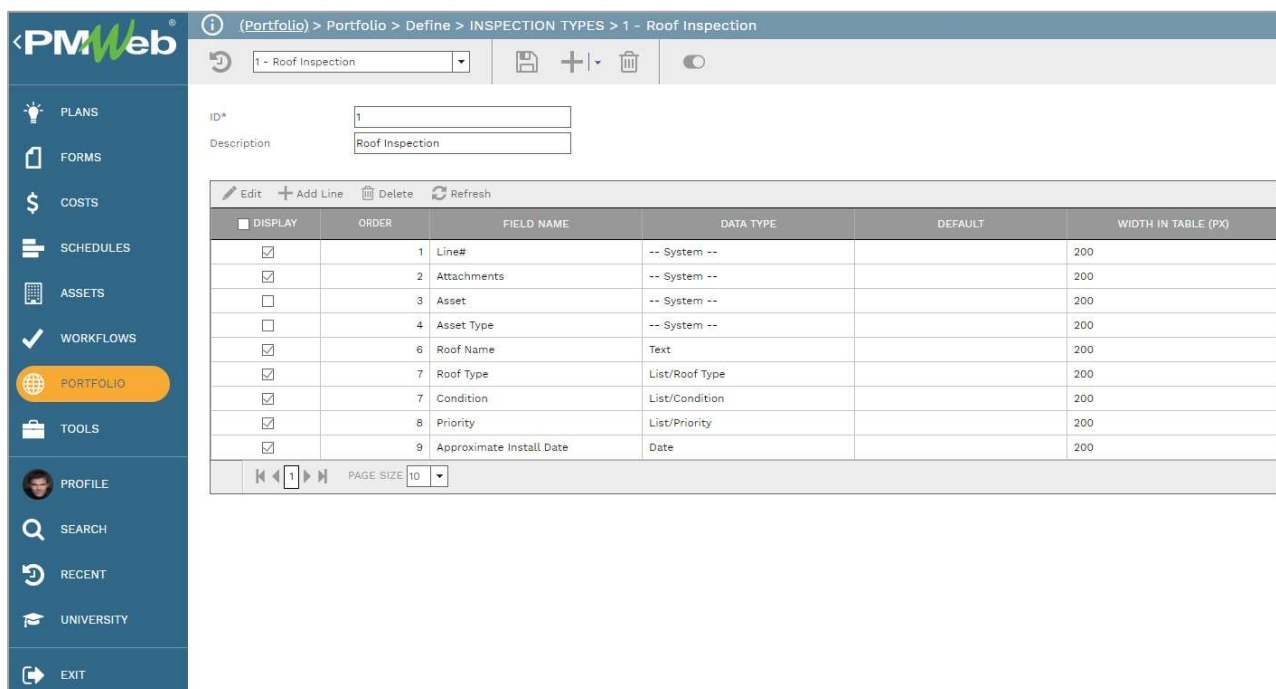


Figure 3 - Defining Inspection Types

In the screenshot above, each line in the table represents one of those question fields. For each question you can enter a name, select a data type, enter a default value, or enter a width for the field in the Inspections record table. These fields are available:

- Display – Check this box to display the question in Inspection Records.
- Order – This is the order in which the question appears in the Inspection record. This field cannot be directly edited. Instead, with the table in read mode, click a line and drag it up or down in the table to automatically change its order.
- Data Type – The options are: Integer, Double, Currency, Date, Boolean, List (Including system lists and custom list), Text (the default), and Memo.
- Default – You can enter a default value for the question here.
- Width in Table – This is the width of the question in the Details table of the Inspection record, in pixels. The default is 200. These are default widths. PMWeb may adjust these in order to accommodate the width of your screen.

Note that several questions have a read-only Data Type of “—System —”. These questions cannot be deleted, but you can uncheck the Display checkbox if you do not want to show them in the Inspection Record. System questions include: Line #, Attachments (to allow attaching to lines in the Inspection record), Asset, and Asset Type.

You can use the toggle switch in the header toolbar to make an Inspection Type inactive. Inactive Inspection Types cannot be used in new Inspection records.

Inspection Records

After defining at least one Inspection Type, you can enter Inspection records. When you select a Project for the record, the Location linked to it appears in a read-only field. The next most important decision you make when adding an Inspection record is selecting a Type. By selecting a type, you are determining which questions will be asked for each inspection point. (See [Inspection Types](#), above, for information about defining Inspection Types.) The Type field is required, and it becomes read-only if there are any lines in the Details table.

LINE#	ATTACHMENTS	ROOF NAME	ROOF TYPE	CONDITION	PRIORITY	APPROXIMATE INSTALL DATE
1	(3)	Roof 1	Asphalt Shingles	3 - Good	4. Low	01/01/2000
2	(2)	Roof 2	Asphalt Shingles	2 - Fair	3. Medium	01/01/2000
3	(0)	Roof 3	EPDM	3 - Good	3. Medium	01/01/2000
4	(0)	Roof 4	Rolled Roof	2 - Fair	2. High	01/01/2000
5	(0)	Roof 5	Rolled Roof	2 - Fair	2. High	01/01/2000

Figure 4 - The Inspection Type Selected Determines the Questions Asked

Each line in the Details table is an inspection point. Information can be added to the table using:

- The Add Line button
- The Link Assets button – This button is only visible if you elected to Display the Assets field when you defined the Inspection Type. Assets shown are linked to the Location displayed in the header.
- The Paste From Excel button

Inspection points can also be added and edited using the [Image Tab](#), below.

Generating Records

After the Inspection record has been approved you can click the Generate button in the header toolbar and generate a Work Request, Work Order, Initiative, or Project.

Image Tab

Inspection points can be added in the Details table or on the Image tab. It does not matter where you do the editing – every inspection defined in the Details table is available on the Image tab, and vice versa. In the Image tab you can set an image file as a background and then place inspection point markers on it. Inspection points can be dragged around the image area, new points can be defined on the image, and clicking a point displays its questions and lets you edit the answers.

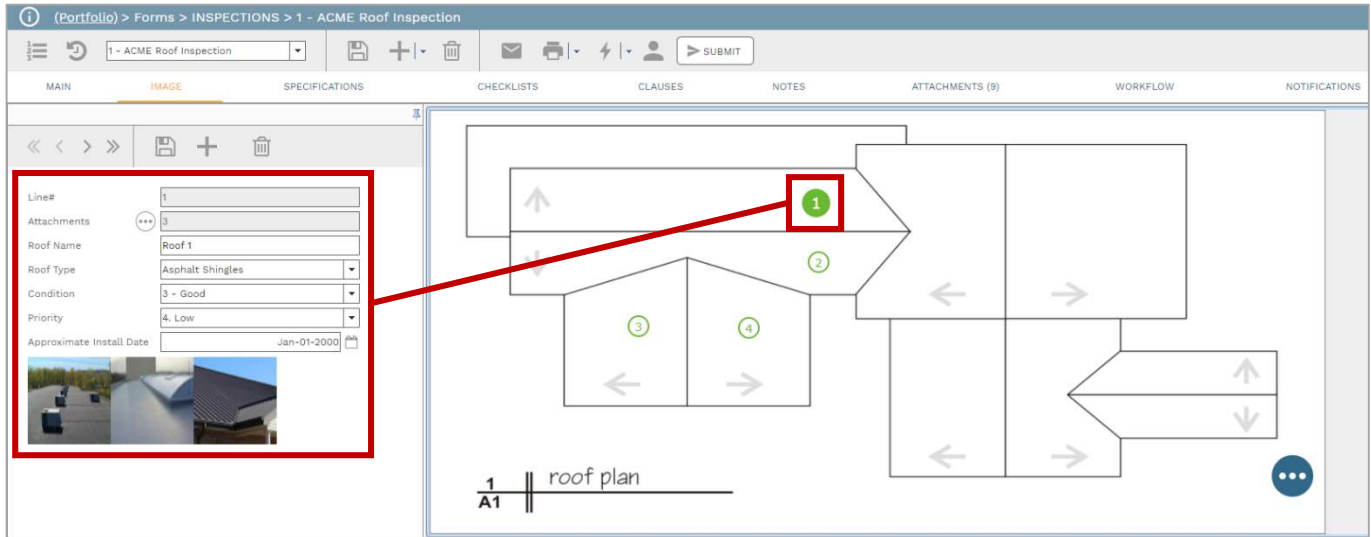


Figure 5 - The Selected Point is Shown in the Details Flyout

Point details can be shown in the flyout to the left of the image or in a dialog box. You can right-click on the image or click the floating action button in the lower right to see a context menu. Context menu actions can include:

- Add a Point – Opens a new inspection point in the flyout (if it is open) or in the Inspection Details dialog if the flyout is collapsed. After saving, the point will be added to the image at the current cursor location.
- View Details – Opens the inspection point in the flyout (if it is open) or in the Inspection Details dialog if the flyout is collapsed.
 - Remove Selected Point from Image – Clears the inspection point from the image area. This does not delete the line from the Details table or the flyout, it merely removes the point from the image. This causes the Place Point button to appear in the flyout toolbar. To replace the point in the image: Click the point button, click OK in the Place Point dialog, click in the image area.

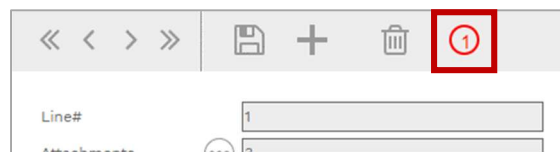


Figure 6 - The Place Point Button in the Flyout Toolbar, to the Right of the Delete Button

- Delete Selected Point – Deletes the point from the image and deletes the line from the Details table.
- Change Image – Opens your device's file browser.
- Delete Image – Removes the image from the record and clears all inspection points. This does not delete lines from the Details table.