User's Guide

Inspectit® ReportPro for Texas



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Overview

Thank you for ordering ReportPro for Texas. The InspectIt family of software is the most comprehensive automated reporting software available on the market today. The programs allow you to generate a report that conforms to the TREC standards with the ease of filling out forms.

The ReportPro program generates the report inside Microsoft Word for Windows. This enables the inspector to compile, edit and print the report using the world's most powerful, full featured word processor.

ReportPro allows you to provide reports that suit your marketplace. If you provide a summary of significant items, the software accommodates this. If you would like to include digital photos or line drawings, this can be done. The software is extremely flexible.

Useful field checklists can be used at the inspection to collect the necessary information with which to generate a report. The checklists are identical in content to the program and can also be edited by you as you make changes to the software. This allows you or your office staff to compile the report with ease after the inspection. A master copy of the checklists has been included with the program. You can use these masters to make copies of the field checklists for use during your inspections.

If you prefer to generate your inspection report on site, the software is quick and simple enough that you can compile and print your report at the end of an inspection. The availability of reliable, yet inexpensive portable computing equipment makes this a more and more viable approach.

NOTICE: Before using the software please review the End-User License Agreement - which can be found in Appendix 2 of this Guide.

Installation Procedures

Steps by step installation are available from the InspectIt website at http://www.ahit.com/support. Should you have any problems or require assistance with the installation of the program, please do not hesitate to contact our Technical Support office by calling 1-800-441-9411 (Option 3), Monday through Friday, 9 AM to 5 PM Central time.

The installation consists of copying the files within the *Setup.exe* file to the \Templates folder for Word. The installation program will then switch the location of your \Templates folder to:

C:\InspectIt\ReportPro for Texas

Word will complete the installation the next time that it is run. Should you have existing templates that you have created within Word and still wish to use them, you will need to copy these template files to the new location of the Templates folder.

Field Check List and AutoText Document

Two additional document files are now on your hard disk in the same folder that you installed the program. The documents are named AUTOTEXT.DOC and CHEKLIST.DOC. The AutoText.doc file is a Word document containing all of the text that the ReportPro program can produce and lists the AutoText entry names. The ChekList.doc file contains a set of checklists that can be used in the field during the inspection, should you wish to use them. You can edit this file as you modify the program to include your own options.

Note: These files can be opened by clicking on the Inspection menu within the program and choosing the option View AutoText Document / \underline{F} ield Checklist.

Navigating Microsoft Word

Using the ReportPro for Texas software means that you will need to be able to navigate through Microsoft Word. To help you understand Word, we have put together a few of the basic terms and features that we feel you will need to use our program. Additional information can be found in Word from the Help option.

Navigate the Word Screen

Word 97 through 2003: The screen shown below will identify the basic components of Word that you will use to navigate through the program. The ReportPro for Texas toolbar will appear on the left side of the screen and each of the section toolbars will float over the top of the document by default.



Word 2007: In this version of Word, the ReportPro for Texas toolbar and each of the section toolbars will appear on the Add-Ins tab at the top of the screen. The floating toolbars are not an option in this version of Word.



Using the Keyboard and Highlighting Shortcuts within Word

While Microsoft Windows is thought of as a "point-and-click" interface, the keyboard can also be used to effectively navigate many Windows applications. Microsoft Word is no different and has proven this by the many different ways to navigate within their program. In addition to using the mouse in a point-click fashion, Word also allows you to use the keyboard with what they call keyboard shortcuts. These are key strokes in which you press two or more keys simultaneously to accomplish many functions. In the keyboard combinations shown below, keys pressed at the same time are separated by a plus (+) sign.

You may find that, with practice, a combination of keyboard and mouse functions can substantially speed up your work, and working in ReportPlus software will be no exception.

Common tasks done in Word	
Bold letters	Ctrl+B
Italic letters	Ctrl+I
Underlining	Ctrl+U
Сору	Ctrl+C
Cut	Ctrl+X
Paste	Ctrl+V
Undo	Ctrl+Z
Select all	Ctrl+A
Selecting Text by mouse	
Any amount of text	Drag over the text.
A word	Double-click the word.
A line of text	Move the pointer to the left of the line until it changes to a right-pointing arrow, and then click
A sentence	Hold down CTRL and then click anywhere in the sentence
A paragraph	Move the pointer to the left of the paragraph until it changes to a right-pointing arrow.
1	and then double-click. Or triple-click anywhere in the paragraph.
A graphic	Click the graphic.
A text box or frame	Move the pointer over the border of the frame or text box until the pointer becomes a
	four-headed arrow, and then click to see the sizing handles (sizing handle: One of the
	small circles or squares that appears at the corners and sides of a selected object. You
	drag these handles to change the size of the object.).
Selecting Text by keyboard	
One character to the right	SHIFT+RIGHT ARROW
One character to the left	SHIFT+LEFT ARROW
To the end of a word	CTRL+SHIFT+RIGHT ARROW
The beginning of a word	CTRL+SHIFT+LEFT ARROW
To the end of a line	SHIFT+END
To the beginning of a line	SHIFT+HOME
One line down	SHIFT+DOWN ARROW
One line up	SHIFT+UP ARROW
To the end of a paragraph	CTRL+SHIFT+DOWN ARROW
The beginning of a paragraph	CTRL+SHIFT+UP ARROW
One screen down	SHIFT+PAGE DOWN
One screen up	SHIFT+PAGE UP
To the beginning of a document	CTRL+SHIFT+HOME
To the end of a document	CTRL+SHIFT+END
To the end of a window	ALT+CTRL+SHIFT+PAGE DOWN
To include the entire document	CTRL+A

NOTE: Many more keyboard shortcuts can be found in the Help menu within Word

The "Undo" Feature in Word

One of the features of Microsoft Word is the **Undo** command. This feature can be accessed from the Edit menu (or the Title Bar in Word 2007) or from the Undo button (shown at the beginning of this paragraph).

You can actually undo multiple actions; up to the last 100 that have been performed on the document. If you inserted the wrong text into your report, click on the Undo button until the unwanted text is cleared. The keyboard command for the undo feature is Ctrl+Z.

Deleting Sections or Pages from the Report Document

To delete a specific section or page from the report, simply highlight the entire page and press either the **Backspace** key or **Delete** key on your keyboard. Be sure to include the page break at the bottom of the page as you are highlighting, if it includes one.

Saving a Word Document

In Word, to Save a document, go to File on the menu bar (or the Office Logo in Word 2007) and select **Save**. You can also use the keyboard shortcut Ctrl+S or select the Save button on the toolbar.

<u>Save your work often</u>! Take advantage of Word's AutoRecover feature. Go to <u>T</u>ools on the menu toolbar, select <u>O</u>ptions in the Tools list then click on the Save tab (or click the Office Logo, choose Word Options, then Save in Word 2007). Next, select the 'Save AutoRecover Info every' feature and set it to the amount of minutes you wish for the save function to automatically run.

Printing a Word Document

When you are ready to print your report, click the Report Printing button on the ReportPlus Toolbar. You can click the <u>File</u> option on the menu bar (or the Office Logo in Word 2007) and select Print. You can also use the keyboard shortcut Ctrl+P or select the print button on the toolbar (shown at the beginning of this paragraph).

If you wish to fax your documents directly from your computer, you can accomplish this by choosing the <u>Print</u> option from the <u>File</u> menu. The print window will contain options to use your fax, local, or network printers.

To print one page or a specific set of pages from your document, in the print window (Ctrl+P), select the pages you want in the **Page Range** area of this screen.

i i i i i coi	1				
<u>N</u> ame:	Microsoft Office	Document	Image Writer	✓ Pro	perties
Status:	Idle			Find	Printer
Туре:	Microsoft Office Documer	nt Image W	/riter Driver	(mg	Thicorn
Where:	Microsoft Document Imag	ging Writer	Port:	🔄 Print to) file
Comment:				📃 Manua	l duple <u>×</u>
Page range			Copies		
 All 			Number of copies:	1	P
Current	page OSelection			-	
O Pages					ollato
010000		1000			ollače
Enter page i senarated b	numbers and/or page range v commas . For example .1	3 5-12			
separateu b	y commas, i or example, i	,5,5-12	L		
Print what:	Document	~	Zoom		
			Pages per sheet:	1 page	
P <u>r</u> int:	All pages in range	~		1 page	0
			Scale to paper size:	No Scaling	
				_	

Getting Started with ReportProTM for Texas Program

Clicking on the "InspectIt" button will display the screen at right. You will be given the option to "Run ReportPro for Texas" or "Inspection Documents" - clicking on these buttons will start the either of the programs. You can also use the Inspection menu to start any of these options (Note: Look to Appendix 1: Inspection Documents Program).

If you choose "Open Existing Report", you will be able to browse your computer to find reports that have already been created. Clicking on the "Report Download" button will cause a screen to appear where you can enter your username and password and download additional reports. If you are Pay-Per-Use, you can download in blocks of 10, 25, or 50 at a time. If you have purchased the software outright, you will just need to enter your username and password once every 50 inspection reports to verify that you are the registered user for the software.

Another way to start the Program is to go to the <u>File</u> menu and select <u>New</u>. You will be given a choice of document templates on your computer (you may need to select General). Choose "InspectIt ReportPro for Texas.dot" (if you are not viewing the .dot extension, choose InspectIt ReportPro for Texas) and click on the OK button and the ReportPro program will start.



Inserting the Inspection / Client Information

lient Name	Inspection Date
Inspection Address	
Inspector	OfficePro Data
1	Cancel

To insert the inspection address and client information into the inspection report, click on the Inspection / Client Information button on the Report Sections screen (shown above). The screen to the left will now appear. When you have finished entering the data on this screen, click on the OK button. The information will be inserted onto the first page of the report. Also, the inspection address will appear in the header and the client name will appear in the footer of each page of the report document. If you choose "OfficePro Data", the program will import the last inspection record that you have exported from the OfficePro software (sold

separately).

When the inspection information has been inserted into the report, the Save As window will appear where you can name and save the document. *Note: Remember that each time you create a new inspection report, it counts as one of your uses of the software – be sure to save the document.*

Report Sections Screen

When you start ReportPro, the first window you will see after the opening screen is the Report Sections screen. You can also call up the Report Sections Screen by clicking the top button in on the left-hand toolbar, from the <u>Report Sections Screen</u> by clicking the top button in on the left-hand toolbar, from the section of the report that you would like to complete. The screen also has options to insert the inspection and client information into the report, and the General Comments screen (see Comment Screens later in this Guide. This screen can be customized to re-define or create your own report sections (see Customizing the Program later in this Guide).

PRO	REPORT SECTIONS
	Structural Systems
	Electrical Systems
	HVAC Systems
	Plumbing System
	Applicances
	Optional Systems
	General Comments Screen
	Report Overview
	Cancel

ReportPro Check Boxes

Check boxes are used to complete the Inspected / Not Inspected / Not Present / Not Function or in Need of Repair portions of the report document. To "check" one of the boxes, simply double-click on it right on the document itself. Double-clicking on it again will "un-check" the box.

Check boxes can be added, deleted, or modified within the program. You'll soon find how easy it is to tailor the report to suit your local conditions by simply editing the check boxes within the ReportPro template file (See "Editing the ReportPro Template" later in this Guide). You can copy and paste in as many check boxes if you choose to add check box items in your Comments area, for example.

The "INFO" Buttons

As you insert text from the Option Screens, you will notice buttons - **INFO** - that appear on the document. Rather than the triple question mark groups where you type in additional information (explained later in this Guide), the INFO buttons allow you to choose from a list of options that you can define yourself. You can use each INFO button an unlimited amount of times and can use up to 125 unique lists (See "Customizing INFO Boxes" later in this Guide).

Inspectit ReportPlus: Ad	ditional information	12
PRO	performing as intended. No significant problems were observed not performing as intended. See additional comments below. in need of major repair. See additional comments below in need of complete replacement. See additional comments below	
Ingert - Close Insert - Repeat Insert - Line Break Insert - Edit		
Edit List Help		~
Cancel	SUMMARY CATEGORIES Summary - Major Summary - Repair Summary - Monitor Summary - Safety Summary - Improve Summary - Deferred Cost)

By double clicking on one of these buttons, a screen similar to the one at left will now appear. You can select and option from the list or type in the text box at the top of the list.

The Insert – Close button will insert your selected item and then close the screen. The Insert - Repeat button will insert your selected item and keep the screen displayed so that you may select another item. The Insert - Break button will act as if you hit the Enter key and have your next selection start a new paragraph. If you have chosen the Run Next INFO Button option from the Search toolbar (see the Search for Additional Information section), the Insert - Edit button will insert your selection, close the screen and stop the program from searching for the next INFO button.

If you wish to edit the list to add your own pre-defined options, click on the Edit List button (Note: If a Convert File screen appears, choose the option Text Only). A text document will now appear containing the list of options currently available. You can add an unlimited amount of

your own options, edit any existing items, or delete any items you do not apply to your geographic area. Each item should be contained on a single line and not be longer than 250 characters (which includes any punctuation). Once you have made your changes, simply close the list document and save the changes.

Note: If a screen appears saying that all formatting will not be saved, click Yes to continue with the save. The INFO button lists must be saved as a Text Only file (.txt) and cannot contain any formatting.

Comment Screen Toolbars

When you select a choice from the Report Sections screen, the Comment Screen toolbar for that section will now appear over the report document. Each Comment Screen for the section has it's own button on this toolbar (see the Structural Comments toolbar at right for an example). Clicking on one of these buttons will activate the appropriate Comment Screen (see the next section of this Guide) that you can use to insert items into your report document.

InspectIt Re	por	rtPro for	Texas:	Structural (ОП	nments	×
Foundations	Gr	ading / D	rainage	Roof Coveri	ng	Roof Structure / Attic	Walls
Ceilings / Floo	rs	Doors	Windows	s Fireplace /	CH	nimney	
Porches / Dec	ks /	Carports	Other	Picture	C	lose Toolbar	

ReportProTM for Texas Tip:

You can have as many section toolbars open at one time as you want. For example, if you are working on the Exterior section of the program, you may want the Structure, Electrical, and Plumbing toolbars showing so you can quickly move back and forth between these sections. You can also re-position any toolbar by holding your left mouse button down in the title of the toolbar and then dragging the toolbar to a new location.

ReportPro Comment Screens

One of the most exciting features of the ReportPro program is the Comment Screens. The Comment Screens will allow you to define your own entries (which are saved as AutoText) to the software. Each sub-section of the report (Foundations, Heating Equipment, Dishwasher, etc.) has it's own Comment Screen. The Comment Screen feature also includes a utility that enables you to define new AutoText and add the AutoText name to the Comment Screen of your choice simultaneously (see "Modifying Comment Screens" later in this Guide).

The Comment Screen feature can be used to add any observations, recommendations, additional text, etc., that you may need in the program that are not present by default; observations which are specific to your geographic location, for instance. There is no limitation to the length or formatting of the text that you define to the screen - you can even define a combination of a photo, a drawing, and a paragraph of text as a single entry!

To insert text into the report with the Comment Screens, follow these steps:



- Bring up the toolbar for a particular section (example: Structure) and click one of the buttons (example: Foundations). The screen below right will now appear.
- Choose an option from the upper portion of the screen. Items that appear in all caps are sub-headings that can be used. If you are unsure as to which option you would like to select, you can use the <u>Preview button</u>. Clicking on an option and then clicking on the <u>Preview button</u> will display up to the first 255 characters of the option you have selected.
- If you wish, you can choose an option from the Locations / Additional Comments list. Many of the options allow you to add items from this list into the text as it is printed on the report. You can also type in the upper portion of the list up to 250 characters in case none of the list items are applicable. This list can be modified for each Comment Screen to include your own options (see Modifying the Location Lists later in this Guide).
- Click on an Insert button. You will notice that on the Comment Screens, you have a choice: "Insert in Section", will place your text in the section of the report you are working on. The "Summary" buttons will insert your choice in <u>both</u> the Report Overview page (Summary) of the report as well as in the current section (example: Foundations). The "Insert At <u>Cursor</u>" button will insert your choice at the current cursor location within the document (this option is especially helpful when you are editing the report and realize that you need to insert additional text). After you have finished inserting your text, click on the Cancel button to close the screen.

Note: Please note that if you select location, the location will remain on the screen and be inserted into any additional options unless you clear the Location text box. You can accomplish this by clicking on a blank line in the list of location options.

Note: A button titled "<u>H</u>int" is also on the Comment Screens. This button will give you information about how to use the Comment Screens while you are creating a report.

General Comments Feature

Similar to a Comment Screen, this screen can be used to insert additional information within the report. Bring up the Report Sections screen and then click on the General Comments button. The screen at right will now appear and you can make your selections by clicking on an item on the list and then clicking on an Insert button. Insert - At Cursor will insert your selection at the current cursor position. If you choose the Insert – At End button, a page break will be inserted at the end of the document and then the option you selected will appear on the following page.

Each of the options on this screen has a corresponding AutoText. When you choose "Maintenance Advice", two pages of text are added to the report document. Choosing any of the Photo Frame options will insert a frame on your document of a fixed size that you can then insert a photo or drawing into. The advantage of this is that the photo or drawing will be the size of the frame, not the width of the document.

Inspectit ReportPro for	Texas: General Comments	2
PRO	Maintenance Advice Radon Information EIPS Information Carbon Monoxide Information Lead Paint Information	*
Ingert - At Cursor Insert - At End	PHOTO FRAMES Photo Frame 1 Photo Frame 2 Photo Frame 3 Photo Frame 4 Photo Frame 5	
Preview		
Lint Cancel		1

The ReportPro Toolbar

The special toolbar that appears along the left-hand side of the screen has many helpful features. The toolbar can also be turned off if you are using the program on a smaller screen and wish to see more of the report document.

The "Report Sections" button gives you access to the Report Sections Screen, where you can choose which section of the report you would like to create or edit. This button will also display a toolbar that will allow you to start any section of the report (e.g. starting the Exterior section) without going to the Report Sections Screen.

???

TREC

"Search for Additional Information" searches the report document (similar to the Find and Replace function in Word), from the current cursor position to the end of the document, for a group of 3 question marks (???). When you define text to the program, you can have the question marks present so that you can add information to the text entry after you have inserted it into the report (example: serial numbers, amperage, etc.).

Using the "Copy to Report Summary" button will copy highlighted text observations to the summary section of the Report **†** | Summary. After the text is copied to the Summary page, you will be returned to where you were working in the report document.

The "Photo Frame" buttons will add an empty frame at your current cursor position in the report document. You can then insert a photo or digital image into the frame and it will be automatically sized to the size of the frame. The "Photo Summary" button will add a new page to the end of the report with 6 photo frames on the page.

The "Report Printing" button will search the document for any triple question mark groups (???) or INFO buttons left in the document before bringing up the Print window.

The "Customization Tools" ToolbarClick on the "Customization Tools" button to display a toolbar with customization options to define new text to the program, re-arrange lists of options, re-define existing options, add INFO buttons, edit the template file, etc.

The "TREC Standards of Practice" opens a document which contains TREC Standards of Practice. You can use this as a reference when creating a report or print copies to include with your report documents.

As the name implies, the "Hide Report Sections Toolbar" will hide from view the Report Sections Toolbar.

As the name implies, the "Hide Section Toolbars" will hide from view any section toolbars that are currently open, including the Report Sections toolbar.

Click on the "Open Manual" button in order to open the User's Guide.

Editing the Report

As you work through the Comment Screens of the ReportPro software, text (referred to as AutoText in this Guide) will be inserted into the report document. At some point, you will want to edit the document. You can either edit each report section as you complete it or edit all sections when you have completed all Comment Screens. The text of the report can be edited using any of the powerful features of Microsoft Word (such as changing the fonts, adding color, changing the layout, etc.). If you are unfamiliar with Microsoft Word, refer to the User's Manual and Help files supplied with your version of Word.

Remember that the report can be tailored to your liking. If you don't like portions of the text, or if you want the format or layout of the report to change, this can be accomplished quickly.

While editing a report, read the text to see that it's what you want. If you have made a mistake and inserted the wrong text, you can bring the Comment Screens back and pick the correct option. With practice, you'll be able to navigate very quickly.

You can edit the text or add to it as you see fit. The INFO buttons, Toolbars, and Menu Bar give you powerful features to help speed up your work.

The "Undo" Feature in Word

One of the many powerful features of Microsoft Word is the <u>Undo</u> command. This feature can be accessed from the Edit menu or from the standard toolbar. You can actually undo multiple actions; up to the last 100 that have been performed on the document. If you inserted the wrong text into your report, click on the Undo button on the Word toolbar until the unwanted text is cleared (or keep clicking on the Undo button to undo multiple actions). The keyboard command for the undo feature is Ctrl-Z.

The "Search for Additional Information" Function

This function of ReportPlus searches the report (similar to the Find and Replace function in Word), from the current cursor position to the end of the document, for a group of 3 question marks (???) or InspectIt ReportPro for Texas: Search
Search For Additional Information (???) Run Next INFO Button Go To Cover Page Close Toolbar

INFO buttons (see next section for information regarding INFO buttons). When you define text to the program, the question marks can represent information to be added to the text after you have inserted it into the report (example: serial numbers, amperage, etc.).

By clicking on the Search for Additional Information button, the program searches your report document and highlights the 3 questions marks (???) – when you start typing, the question marks are replaced by your new text. For INFO buttons, the cursor will be blinking immediately to the left of the button. A toolbar will also appears so you can continue to search your report document or go to the beginning of the document to begin your search from the first page to the end of the report.

Clicking on Run Next INFO Button will cause the program to search for the next INFO button and automatically double-click on it. You can then select from the list of options in the Additional Information screen.

Adding Graphics to the Report

Digital images such as photos from a digital camera, your company logo, line drawings, etc., can be inserted into the inspection report. Position your cursor where you want the graphic to appear and choose the **Add Photo** option from the ReportPlus toolbar or you can also use the **Picture...** button on any section toolbar.

A screen will appear – such as the one shown to the right - allowing you search the hard drive and even give you a preview of the image. Once find the image, click on the name to highlight it and choose the **Insert** button. You will now see the image in your report. You can also insert photo frame into your document and then insert your photo within the

IMPORTANT NOTE: Before you choose to insert an image or photo into your report, the cursor must be blinking on a blank line with no text otherwise Word will close and no changes will be saved to the document.





Once the image is inserted within the frame you are then able to add an arrow, oval, text box or call out by right clicking on the image. As seen to the right, a box will then pop up and you will scroll down to "ReportPlus Options Menu" which will then open another box giving you options to add graphics to your image.

You have the ability to change the default color and size of the graphics by selecting "Image Format Settings" in this pop up box. This will open a new option screen that contains the setting for the four graphics provided (arrow, oval, text box and callout). Changing the settings in this window will make the settings permanent until another change is made. You can find a view of the "Image Format Settings" screen below. The functionality and look of this window remains the same in Word 97-2003 and Word 2007.



Once the image appears on the document, you can click on the Drawing button and bring up the **Drawing** toolbar to highlight specific areas of the photo. The toolbar can also be shown by clicking with your right mouse button on any toolbar and selecting Drawing from the list. You are able to add arrows, squares, circles, etc. directly on the photo itself and change the color and size of the shapes once they have been drawn in using the buttons on the toolbar.

Note: In Word 2007, you will need to click on the Insert tab of the Ribbon and select the Shapes option in the Illustrations group. Once a

Drawing ▼ × Draw・ & | AutoShapes・ \ ヽ □ ○ ≧ ◀ ۞ ◙ | 월 • ⊿ • ▲ • ≡ ☴ ☵ ▣ ◙]

shape,

such as an arrow, has been drawn on the document, the Ribbon will change to give your formatting options such as color, thickness of line, etc.

Deleting Sections or Pages from the Report

To delete a specific section or page from the report, simply highlight the entire section or page and press the Delete key on your keyboard. Be sure to include the Page Break at the bottom of the page as you are highlighting, if it includes one.

Saving your Report to Disk

If you did not save the report document when is was created, you can use the <u>Save</u> Inspection Report option from the <u>Reports</u> menu. The program will display the Save As window and allow you to save the current document with the name of your choice in the Inspection Reports folder on your hard drive (as defined in the Default Folders screen).

<u>Save your work often</u>! Don't compile an entire report without saving it along the way – by clicking on the Save button on your toolbar, for instance. You would also be wise to take advantage of Word's AutoRecover feature (found by clicking on the Tools menu, selecting Options, and clicking on the Save tab).

Emailing the Report

If you wish to email your inspection documents directly to your customer, Realtor, or other interested party, you can attach the inspection document to an email message through your email software. Please look to the documentation or help file within your email software if you are unsure about attaching files.

We would suggest password protecting your document if you are going to send it via email. This can be done by clicking on the <u>F</u>ile menu and choosing Save <u>As</u>. From the Save As screen, click on the <u>Options</u> button (in Word 2000 or 2002, click on the Too<u>l</u>s button and choose <u>G</u>eneral Options). On the screen you will see a text box where you can enter a password to protect the document from being modified.

Customizing the ReportProTM for Texas Program

Editing the ReportPro Document Template

A "template" file is similar to pre-printed letterhead. The template contains the text and formatting that appears by default when you begin a new inspection report. Template files can be edited in the same way as any Word document.

To open the ReportPro document template file, choose the <u>Reports</u> menu and select Modify Report Template. The template file (*InspectIt ReportPro for Texas.dot*) will now open and you will be able to edit it exactly as you would a document file.

IMPORTANT NOTE: When editing document templates or AutoText entries, you should be viewing the Bookmarks that are present within the text (see Bookmarks later in this Guide). Bookmarks appear as large capital I's or the end section of an I-beam. Be very careful not to delete the Bookmarks while editing – deleting them will cause errors within the program.

An important rule to remember is that when you are editing the template, <u>you should not run any of the program functions</u> used to fill out a report. Anything added to the template becomes a *permanent* change. Once you have completed your editing of the template file, be sure to save your changes. The documents generated from the ReportPro program will now include your changes.

Editing the Inspection Documents Template

Included without charge with the ReportPro software is our document generator OfficePro Express. You can create cover letters, invoices, inspection order forms, promotional letters, and so on. To edit these documents, (inserting your own logo, company name, etc.) open the *OfficePro Express.dot* file and edit the template as you would a document.

Note: See "Appendix 1: OfficePro Express" at the back of this User's Guide for additional information on customizing the OfficePro Express program.

Customizing the Comment Screen Summary Sections

On each Comment Screen there are 6 Insert buttons below the Insert in Section button on the left side of the screen. These buttons can be used to create sub-categories within your Summary section of the report. Each button corresponds to a unique bookmark – Summary for the first button, Summary2 through Summary6 for the following buttons. These bookmarks can also be moved so that they are on separate pages if you wish.

The names of the categories can also be changed. To edit a category name, click on the AutoText Tools toolbar button on the left side of the screen and then click on the Customize Summary Categories button. The screen at right will now appear and you can now edit the titles.

Note: You will need to also edit the *InspectIt ReportPro for Texas.dot* template to change the text of the sub-headings on the Summary page.

Bookmarks

ReportPro uses bookmarks as placeholders so that it knows where in the report document to insert your Comment Screen selections - as well as the Inspection / Client information. If the bookmarks are not present within the inspection report, <u>ReportPro will not know</u> where to place text within the document and will generate an error message – therefore it is very important that the bookmarks are not deleted.

You can view the bookmarks while you are working on the document to help you from inadvertently deleting them. To do this, either click on the Bookmarks button on the left-hand toolbar in the ReportPro program or choose the Show/Hide <u>B</u>ookmarks option from the <u>Reports menu</u>. The bookmarks will appear similar to a capital I or and end section of an I-beam – please look to the example below (the bookmark is between "lot" and "is"):

The lot is lower than adjacent lots. Grading improvements should be undertaken where possible. The general topography of the area is such that it will be difficult to control storm water entirely. During heavy rains or snow melts, the accumulation of storm water on the lot may be unavoidable.

You can find the name of a particular bookmark by clicking your cursor on the bookmark and then selecting the Bookmark option from the Insert menu. The name that appears directly below "Bookmark name:" is the name of the bookmark. There is also a keyboard shortcut to bring up the Bookmark screen – Ctrl+Shift+F5.

Should you delete a bookmark, you can re-insert it into the document or template file. First, make sure you are viewing the bookmarks and then place your cursor where you want the bookmark to appear. Next, click on the <u>Insert menu and choose Bookmark</u>. You can now type in the name of the bookmark, click on the add button, and the bookmark will now appear in the document. You can also use this same process to move a bookmark from one location to another.

The following chart is a list of bookmarks that are present within the document template by default. This list shows you which page the bookmark appears on and the purpose of each bookmark. Use this list as a reference in case you delete a bookmark or wish to move a bookmark to a different location.

	Name	Purpose
Cover Page:	cover	Informs ReportPro of the location of the Cover Page
	client	Location of the Client's name
	inspaddress	Location of the Inspection address
	inspector	Location of the Inspector's name
	inspdate	Location of the Inspection date
Header:	PropID / PropID2	Location of the Inspection address
Footer:	client1 / client2	Location of the Client's name
Report Summary:	Summary	Used when copying items to Summary section 1
	Summary2	Used when copying items to Summary section 2
	Summary3	Used when copying items to Summary section 3
	Summary4	Used when copying items to Summary section 4
	Summary5	Used when copying items to Summary section 5
	Summary6	Used when copying items to Summary section 6
Report Sections:	Note: Each sub-section h The naming convention i	as a bookmark that corresponds to a Comment Screen. is as follows:
	The first characters indic section I to VI	ate the section number in Roman numerals – from
	The next character indica The final characters will	ates which sub-section letter it corresponds to – A to K be all zeros – 8 characters total.
	Therefore, for Structural	(Section I), the bookmarks would be as follows
	IA000000	Location for Foundations comments
	IB000000	Location for Grading and Drainage comments
	IC000000	Location for Roof Covering comments
	In another example, the b	bookmarks for Plumbing (Section IV), would be:
	IVA00000	Location for Water Supply System and Fixtures comments
	IVB00000	Location for Drains, Wastes, Vents comments
	IVC00000	Location for Water Heating Equipment comments

Modifying the Comment Screens

This feature is remarkably easy to use. You can add your own observation items to any of the Comment Screens for each section of the report (Foundations, Heating, Dishwasher, etc.). The example below contains step-by-step instructions.

Example: Adding an Item to an Comment Screen

In this example, we will add an item to the Comment Screen in the Grading and Drainage section of the program.

- Type the text for your new option anywhere within the inspection report. Our sample text for this exercise is shown below: The lot is lower than adjacent lots. Grading improvements should be undertaken where possible. The general topography of the area is such that it will be difficult to control storm water entirely. During heavy rains or snow melts, the accumulation of storm water on the lot may be unavoidable.
- Next, we will add a "LOC" bookmark to the text so we can insert a location into the text, if we choose to do so. Click on the <u>View</u> menu, choose Toolbars, and choose the option "InspectIt
 InspectIt Customization Tools

Customization Tools" or select "Customization Tools" from the ReportPro Toolbar on the left hand side. Next, click on the Bookmarks button 🗊 on the Customization Tools toolbar and

InspectIt Customization Tools	•	×
∓ 🔎 👼 🚟 Add Location Bookmark 😨 🦷 🏧 🗹		
Summary Categories 🔚 🔚 🔚 Report Conventions 🚺 🎒 👺 🚰 🌃	Clo	se

choose "Show Bookmarks". Now, place your cursor where you would like the location to appear and click on the "Add Location Bookmark (LOC)" button from the Customization Tools Toolbar. Our sample text will now appear as below:

The lot Lis lower than adjacent lots. Grading improvements should be undertaken where possible. The general topography of the area is such that it will be difficult to control storm water entirely. During heavy rains or snow melts, the accumulation of storm water on the lot may be unavoidable.

Solution Solution

The lot \overline{I} is lower than adjacent lots. Grading improvements should be undertaken where possible. The general topography of the area is such that it will be difficult to control storm water entirely. During heavy rains or snow melts, the accumulation of storm water on the lot may be unavoidable.

- Once the text is highlighted, choose the "<u>A</u>dd To Comment Screens" option from the <u>Reports menu or button on the toolbar</u>. The program will now ask you which screen to modify (choose Grading / Drainage from the screen shown to the right).
- In the "Enter a name for the new item:" field on the screen shown below, type in the name of the new Comment Screen entry we will call our observation "Low Lot".

AutoText Name		
Enter a name for the new item:		
1		
NOTE: You can use up to 32 chara AutoText name	acters, includir	ng spaces, for the
To delete an entry, highlight an e click on the delete button	xisting item, th	ien
GRADING / DRAINAGE COMMENTS	5	PRO
Low Lot Relative To Neighbor	- 1	
New option		
Grading Improvement Needed		
Swale Improvement Bet. Houses		
Driveway Slopes Towards House		
Seal Driveway At House		OK
Walkway Slopes Towards House		
	and the second s	Concol
Ravine Erosion Problem?		Cancer
Ravine Erosion Problem? Improve Grade		

Once you have named your entry and clicked on the OK button, the program will ask if you want to edit the text file (.txt) for the Comment Screen. The option you just added will appear at the end of the list and you can edit the text file to group

	II.		
I. STRUCTURAL SYSTEMS	-	PRO	
Foundations Gradina / Drainage Nacy Covering Walls (Theretor / Exterior) Cellings / Hones Doors (Unterior / Exterior) Windows Fireglace / Chinney Porches / Dacks / Carports Other		ik.i	
II. ELECTRICAL SYSTEMS	-		
Service Entrance / Panels Branch Circuits / Connected Devices / Fixtures			
III. HVAC SYSTEMS	-		

similar items together (example: grouping all of your Grading comments together – see the next page for information on editing .txt files).

IMPORTANT NOTE: To make the change <u>permanent</u> you will need to save the *InspectIt ReportPro for Texas.dot* template when you close your current document.

Note: <u>You can also delete items</u> using steps in this example. First, you would not highlight any text and then bring up the Comment Screen of your choice. Using the list box shown at above left, click on the option you wish to delete and then click on the <u>D</u>elete button.

Example: Editing an Comment Screen Text File

In the previous example, we added an item to the Exterior Observations Comment Screen and will now change the position on the screen where our option can be found. You can also use the cut and paste commands to transfer options from text file of one screen to another, if you wish to re-organize your report sections.

- Click on the <u>Reports menu and choose the option "Edit Comment Screen Text Files". The program will now ask you to modify a text file in which section (choose Grading & Drainage).
 Note: you can edit the Location list for Grading & Drainage and all other Comment Screen Location lists by choosing Grading/Drainage and then click on the Edit Locations button.
 </u>
- Word will now open the text file (in this example: IB000000.txt) and the paragraph marks (¶) will automatically turn on. To turn them back off after you've edited this file, click on "Show/Hide ¶" button shown on the screens below.

引 IB000000.txt - Microsoft Word	. 🗆 🗙
Eile Edit View Insert Format Iools Table Window Inspection Help	
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GRADING-/-DRAINAGE-COMMENTS]	-
Low-Lot-Relative-To-Neighbor¶ •¶	
New.option¶	
Grading. Improvement. Needed M	
Swale · Improvement · Bet. · Houses¶ •¶	
Driveway.Slopes.Towards.House¶	
Seal.Driveway.At.House¶	
Walkway·Slopes·Towards·House¶	
- 91	1
Ravine · Erosion · Problem? ¶	G
Low.Loty	4
Plain Text • Courier New • 10 • B J U 重喜喜喜 经语律 日• 🖉 • 🗛 • •	
Page 1 Sec 1 1/1 At Ln Col REC TRK EXT OVR	

- Scroll down to the end of the document. We can now see our item "Low Lot".
- Highlight this line and choose "Cut" from the <u>E</u>dit menu. If your cursor is on a blank line after you cut the text, hit the Backspace key.
- In this example, we decide that we want this item to appear above the option "Low Lot Relative To Neighbor". Scroll up the document until these items appear.
- O Place your cursor at the beginning of the "Low Lot Relative To Neighbor" line and select "Paste" from the Edit menu. Note: when you paste in the option, <u>Word will often add an extra space at the end of the line</u>. The spaces are represented by dots as shown on the screen below. If an extra space has been inserted, <u>be sure to delete it or the program will not recognize it as an AutoText entry.</u>

B000000.txt - Microsoft Word	. 🗆 🛛
Eile Edit View Insert Format Iools Table Window Inspection Help	
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	· ˈˈː · 🔺
GRADING./.DRAINAGE.COMMENTS¶ ¶	
Low.Lot¶	
Low.Lot.Relative.To.Neighbor¶ .¶	
New.option¶	
Grading.Improvement.Needed¶	
Swale Improvement Bet. Houses M • M	
Driveway.Slopes.Towards.House¶	
Seal.Driveway.At.House¶	-
Walkway·Slopes·Towards·House¶ •¶	*
Ravine · Erosion · Problem? ¶	*
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Page 1 Sec 1 1/1 At 1.4" In 4 Col 1 REC TRK EXT OVR	1



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Close and save the "IB000000.txt" file making sure that the file is saved as a text only (.txt) file by Word (you can lose the formatting changes). The next time you run the Exterior Observations screen, the "Low Lot" option will now appear at the top of the list.

Note: If you want to leave a blank line between groups of options, be sure to hit the spacebar once – the line cannot be totally blank.

Editing the ReportPro AutoText Entries

The text defined to the ReportPro program is saved as AutoText entries within Microsoft Word. Changes made to the AutoText entries will be permanent. If you just want to change a word or phrase in a particular report, do so in the report document itself and do not change the AutoText. To make a <u>permanent</u> change to the pre-defined text, change the AutoText entry as shown in the following example.

Example: Re-Defining AutoText

In this example, we will edit and re-define the "Low Lot" observation from the Exterior / Observations screen. Before beginning, we recommend activating the "Show Bookmarks" feature.

• Insert the text into a report document by choosing the "Low Lot" option from the Exterior / Observations screen or if you know the AutoText name, type it in and press the F3 key on your keyboard. The text will now be inserted into your document as shown below:

The lot is lower than adjacent lots. Grading improvements should be undertaken where possible. The general topography of the area is such that it will be difficult to control storm water entirely. During heavy rains or snow melts, the accumulation of storm water on the lot may be unavoidable.

• Next, edit the text to your liking. In this case, we will remove phrase "or snow melts".

The lot is lower than adjacent lots. Grading improvements should be undertaken where possible. The general topography of the area is such that it will be difficult to control storm water entirely. During heavy rains, the accumulation of storm water on the lot may be unavoidable.

Solution Now highlight the text. To preserve the formatting, you will need to also include the paragraph mark (¶) at the end of the last sentence. This mark is usually hidden and can be seen by clicking the "Show/Hide ¶" button ¶ on the Word toolbar. A good way to highlight text is to have your mouse pointer in the left-hand margin and move the mouse straight down while pressing the left mouse key. This highlights an entire line at a time as you move down the page and will automatically include the paragraph mark at the end of the highlighted text. See Appendix 1 for examples on how to highlight items to preserve the default report format.

The lot Lis lower than adjacent lots. Grading improvements should be undertaken where possible. The general topography of the area is such that it will be difficult to control storm water entirely. During heavy rains, the accumulation of storm water on the lot may be unavoidable.

- Once the text is highlighted, choose the [™] "Edit Auto Text" option from the Customization Tools toolbar. The screen shown to the right will now appear.
- Make sure that "InspectIt ReportPro for Texas.dot" is selected from the "Look in:" list box on the AutoText screen.
- In the "Enter AutoText entries here:" field type in the AutoText entry name ("Low Lot") or select it from the list.
- Click on the "Add" button. A screen will appear that will ask, "Do you want to re-define the existing AutoText entry?" choose "Yes". If this screen does not appear, either the AutoText name is incorrect or you have not chosen the "InspectIt ReportPro for Texas.dot" option from the "Look in:" field.

The entry has now been re-defined and will appear in the edited version the next time that you insert it from the Comment Screen.

Note: To make the change permanent, when you close the document that you are currently working on, Word will ask <u>if you want to save changes to the</u> *InspectIt ReportPro for Texas.dot* template file. Choose "Yes" from the screen if you wish to keep the changes you made to the AutoText.

AutoCorrect ? X AutoText Show AutoComplete tip for AutoText and dates To accept the AutoComplete tip, press Enter Enter AutoText entries here: Low Lot Add Low Lot Relative To Neighbor * ow Quality - Mild Disrepair. ow Water Pressure Main Clean Out Not Found MAIN DISCONNECT MAIN DISTRIBUTION PANEL Show <u>T</u>oolbar Main Panel Main Panel Cover Not Removed Main Service Rating 100 Amps -Preview The loff is lower than adjacent lots. Grading improvements should be undertaken where possible. The general topography of the area is InspectIt ReportPro for Texas.dot (temp 🔻 Look in: ÖK Cance

There is no limitation to the length or formatting of the text that you define

to the screen. For example, the Maintenance Advice - 2 pages of text using multiple fonts and font sizes. You can also define digital

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photographs or line drawings as AutoText entries. In fact, you can even define a combination of a photo, a drawing, and a paragraph of text as a single entry! Your Microsoft Word manual will help you with creating and editing AutoText entries.

Modifying the Comment Screen Locations Lists

You can add your own options (or modify existing ones) on the Comment Screen Location lists. Click on the <u>Reports</u> menu and choose the option "Edit Comment Screen Text Files". The program will now ask you to modify a text file for a particular Comment Screen (example: Grading / Drainage). Choose the screen whose list you wish to edit and then click on the Edit Locations button. The text file is then opened and you can add, edit, re-arrange, or delete as you see fit. See the example "Editing an Comment Screen Text File" earlier in this Guide for step-by-step instructions.

Customizing the "INFO" Buttons

You can use each INFO button with the same list of options an unlimited amount of times and up to 125 different INFO buttons can be created – each with it's own unique list of options. The INFO buttons can be present on the ReportPro template file or defined within AutoText entries.

To place an INFO button on the document or template, simply highlight an existing INFO button, copy and paste it into a new location. If you wish to use the same list, there is nothing further you need to do. To use a different list of items or to create a new list, click on the INFO button with the right mouse button and choose the option Toggle Field Codes. Instead of only the button graphic being displayed, the example shown below will appear on the document:



{ MACROBUTTON InformationPopUp1 [NFO] }

To change the list of options that will be displayed, change the number following the text "InformationPopUp". Since the program can accommodate up to 125 different lists, the text can read from "InformationPopUp1" to "InformationPopUp125". Once the number has been changed you can switch back to displaying only the button by clicking with your right mouse button over the text and choosing the option <u>T</u>oggle Field Codes.

PIRCO	The foundation is performing as intended, not performing as intended. in need of major repair. in need of complete replacement.	1
Ingert - Close	non-existent.	
Incert - Repeat	The ventilation for the crawl space area was found to be adequate.	
Insert - Kepear	insufficient.	
Inse <u>r</u> t - Line Break		
Inser <u>t</u> - Edit		
Edit <u>Li</u> st		
Hint		

The INFO buttons can be used with text that is already present in the document or be used to create paragraphs. The first example would be on the Foundation sub-section where the text "The foundation is " is present on the document and the INFO button would give you options to complete the sentence ("performing as intended", "in need of major repair", etc.). Another example would be to create INFO buttons with lists such as shown on the screen shown at left.

Using the list on this screen, you could choose the first option – which would be the beginning of the sentence – and then choose one of the options below to complete the sentence. You could then go on the next group of options and create another sentence. This would build a paragraph of two sentences on your document. If, however, you wanted to have both sentences as separate lines, you would click on the Line Break

button before moving onto the second group of options. To try the options on this screen for yourself, this list has been defined as "InformationPopUp125".

Defining the Default Folders

You can define the default folders on your hard drive for Inspection Reports, Inspection Documents, and the location of your digital images (such as digital photos, line drawings, etc.) by clicking on the <u>Reports</u> menu and choosing the <u>Default</u> Folders. Type the paths to the folders of your choice, click on the OK button, and the location will be saved to the program. When you next use the Inspection Report option from the <u>Reports</u> menu, the program will change to folder that you have entered on the Default Folders screen your inspection reports before it displays the Save As window.

Note: The folders that you define must exist on your hard drive – typing in a path on this screen will not create the folder. You must create the folders Windows Explorer, for example) prior to using this option.

ispectit Reportizio for Texas: Default Folde	rs		
Use the text boxes below to define your default folder	rs	PRO	optio
Inspection Reports Folder			
C:\My Documents\Inspection Reports			<u>S</u> ave
Digital Images Folder			the
D:\My Photos			
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	VK		TOIUC

TREC Standards of Practice

The TREC Standards of Practice for home inspection have been provided with this program as a separate Word document. If you wish to include the Standards with your inspection report, you can print off as many copies as you wish. Also, since it is a Word document, you can customize the document to include your company information, logo, etc. To open this document, click on the TREC button a on the ReportPro toolbar.

Backing Up the ReportPro Program

You've heard it time and time again. Back up your important files and software. Well, we're going to tell you again. Make a back up copy of the *InspectIt ReportPro for Texas.dot* file whenever you make a changes to the AutoText, Report Sections Screen, Toolbars, or the ReportPro template. To do this, simply back up the file *InspectIt ReportPro for Texas.dot* from the Templates folder of Microsoft Word to your back up media (tape backup, Zip disk, floppy disks, etc.) and keep it in a place where you'll be able to retrieve it. If you do not do this and experience a hard disk problem, all of your AutoText and/or template changes will be lost.

Programs such as Microsoft Backup (which came as part of Microsoft Windows) can be used to back up ReportPro. We would recommend backing up the entire Templates folder when using this type of backup software. See your Windows documentation or help files for more information.

Note: The text files associated with the Comment Screens should be backed up as well. These files are located in the Templates folder and all files are named with four tilde symbols (example: IVA00000.txt) for easy recognition. Simply copy these files to the same backup disk that you use for the ReportPro template file.

Note: Both the *InspectIt ReportPro for Texas.dot* template and the Comment Screen text files are located in your Templates folder for Microsoft Word. If you do not know the location of your templates folder, please look to the section of this Guide entitled "Determining the Word Template Folder" for instructions on how to locate your Templates folder.

Transferring Files between Computers

As you customize your options within the ReportPro program, you may wish to transfer all of your changes from your desktop to your laptop computer. This can be done by transferring the template file *InspectIt ReportPro for Texas.dot* and the Comment Screen text files (example: IVA00000.txt) from the Templates folder of your desktop to the Templates folder of your laptop. After these files have been transferred, when you next run the ReportPro program, the options and layout will be identical on both computers.

Note: Both the *InspectIt ReportPro for Texas.dot* template and the Comment Screen text files are located in your Templates folder for Microsoft Word. If you do not know the location of your templates folder, please look to the section of this Guide entitled "Determining the Word Template Folder" for instructions on how to locate your Templates folder.

Technical Support

At AHIT, we are committed to supporting our products and helping you with your reporting solutions. In trying to provide you with the best possible customer service, we offer a variety of ways to receive information or assistance from our company. Our Technical Support hours are <u>9 AM to 5 PM Central Time, Monday through Friday</u>.

- For technical information and/or assistance, please call our Technical Support line at (800) 441-9411
- Expanded information can also be obtained from our Website at http://www.ahit.com/support.html
- Our online Bulletin Board system can be accessed from our Website at http://www.ahit.com
- Technical Support staff can also be reached via Email at softwaresupport@ahit.com

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APPENDIX 1: INSPECTION DOCUMENTS PROGRAM

Introduction

The Inspection Documents program is designed as a companion program to the InspectIt ReportPlus software and is used to create additional documents needed for the inspection. These documents include and Order Form, Inspection Agreement, Invoice, Report Cover Letter, Letter to the Buyer's Agent, and a Letter to the Seller's Agent. All of these documents can be modified to include your own verbiage, logos, etc. – you can also add an unlimited amount of additional documents.

Running the Inspection Documents Program

Running the Program

To run the program, click the "InspectIt" button on the toolbar at the top of your screen. Select the option "Inspection Documents" to start the program. You will be given the option to "Create Documents" or "OfficePro Data".

If you select "Create Documents", the program will start and you will be shown the Inspection Information screen. From here, you can fill in the screens with the information that will be used to create your documents.

If you choose "OfficePro Data", the program will search for information that you have exported from the OfficePro software, start a new document, and show the Inspection Information screen with the exported information displayed (OfficePro is sold separately).

Company Information

One of the first things you will want to customize in the program is the Company Information. This information will be used on all of the documents that are in the Inspection Documents program by default and can also be inserted into any document that you may add to the program.

To add your information, click on the click the "InspectIt" button on the toolbar at the top of your screen (or click on the Inspection menu on the Word menu bar) and choose the "Company Information" option. A screen will appear where you will be able to use the fields on the screen to enter your company information. When finished, click on the OK button. This information will now be used in all future reports and inspection documents.

Inspection Information Screen

The Inspection Information screen is where you will be doing the vast majority of the work within the Inspection Documents program. This screen displays fields for information about the specific property as well as buttons to access screens used to fill out information on the Client (or Clients), Buyer's Realtor, Seller's Realtor, and Other Referral (such as an attorney, lender, etc.). The information will also be retained while you are using the program so if you made a mistake in the spelling of the Client Name, for instance, you can run the program again without having to input all of the information a second time. Just make the correction and click the OK button - the documents will be updated.



OK

Cancel

nspection Docume	ents: Inspect	ion Inforn	nation						lf you blank	wish to	o start v , click o	with a completion the Clear
Client 1 Name:	Michael	Carpen	ter			Client(c) In	formation		Screen	1 Dulloi	n. The	inspection
Client 2 Name:							rormation		with e	very fi	eld blar	nk.
Inspection Address:	8900 N Kilde	er Ct				Milwaukee		WI	Clicki	ng on t	he Clie	nt(s), Buyer'
Inspection Date:	9/15/2005		Time:	1:30 PN	1	Report Number:	MC05	500915	Realto	or, Selle	er s Rea	utor, or Othe
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Inspection Notes:	Seller says t	that there wi	ill be a dog	tied up in	the back	k yard	Inspec	ction Docum	ents: Buyer's	Realtor I	Informat	ion
Buyer's Realtor:	Eric	Carter				Buyer's Realt						
Seller's Realtor:	Michelle	McMulle	en			Seller's Realto	Name	:	Eric	Carter	r	
Other Referral:						Other Referra	Comp	oany Name:	Century 21	Milwaukee		
Clear Screen						ОК	Addre	ess:	5474 Ash G	rove Blvd.		
							City,	State, Zip:	Milwaukee		WI	53211
							Phon	e Number:	262-574-55	36	1	
ave finished ir	nutting th	e infor	nation	and cl	ick o	n the	Fax	Number:				
in the Buyer's	Realtor so	creen, ye	ou will	be ret	urned	l to the	Work	Number	414-338-55	76	1	
Information Sc	creen.						Caller	lar Number	262 742 64	27		
click on the OI	K button o	n the In	snectio	on Info	rmati	ion	Cellu	iar Number:	202-743-64.	57		

Inspection Documents - Inspection Information Screen

When you screen, the program will then update your documents. You can now print or edit the documents to include any custom text.

Note: If you have made an error within any of the information, click

on the Information Screens button at the top of the toolbar on the left side of the screen, or choose the Information Screens option from the Documents menu. The Inspection Information screen will then re-appear with the information that you had just entered. You can make any changes you wish, then click on the OK button. The documents will then be updated.

Editing the Documents

The Inspection Documents template file contains several documents strung together. At some point, you may want to edit the documents - adding specific information to a letter, for instance. The documents can be edited using all the powerful features of Microsoft Word (such as changing fonts, adding color, changing the layout, etc.). If you are unfamiliar with the word processor, refer to the User's Manual supplied with your version of Word.

Remember, the documents can be tailored to your liking. If you don't like portions of the text, or if you want the format or layout of the documents to change, this can be accomplished quickly.

Using the Keyboard to Navigate the Program

Although Microsoft Windows is thought of as being a point-and-click interface, the keyboard can be used to effectively navigate many Windows applications. The Inspection Documents program is no exception. If fact, you may find that, with practice, a combination of keyboard and mouse functions can substantially speed up your work.

For example, all push buttons in the Inspection Documents program can be activated with a key or keyboard combination. An example would be using the keyboard combination Alt + C to bring up the <u>Client(s)</u> Information screen ("c" being the underlined letter on the button). Also, you can use the Tab key to work your way through a screen. Each time you press Tab, the next option on the screen is highlighted. If you wish to cancel out of any Windows screen, press the Esc key at the upper left-hand corner of your keyboard - which is also the same as pressing the Cancel button.

Saving your Documents to Disk

One of the many beauties of the Inspection Documents program is the ability to save your documents to disk in such a way that you can easily retrieve them at a later date. We recommend that you use file names that correspond to the street address of the property you are inspecting. Alternatively you can use a date-coded format for your file names, or the report number. You can also create folders on your hard drive to store your documents in. It's up to you!

Customizing the Inspection Documents Program

Editing Your Documents - The Inspection Documents Template

A "template" file is similar to pre-printed letterhead as it contains the text and formatting that appears by default when you start the Inspection Documents program. The template can be edited like any Word document.

To open the Inspection Documents template file, choose the <u>D</u>ocuments menu and select "Modify Inspection Documents Template". The template file (*Inspection Documents.dot*) will now open and you will be able to edit it exactly as you would a document file.

Note: Anything added to the template file will become a *permanent* change. Once you have completed your editing of the template file, be sure to save your changes. The documents generated from this point forward using the Inspection Documents program will now include your changes. An important rule to remember is that when you are editing the template, you should not run any of the program functions used to run the Inspection Documents program.

Adding Additional Pages (Documents) to the Template

The most impressive feature of Inspection Documents program is its ability to create an unlimited number of documents, all from filling out the Inspection Information Screens only once. Create as many documents as you want!

Creating new pages or documents to be filled out is a very simple process. Once the template file for the program is open, you can add additional pages simply by inserting page breaks. To insert a page break, click your mouse where you want the page break (usually at the end of the template document), from the Insert menu choose Break, and then select Page Break. Note: The keyboard shortcut for inserting a page break is Ctrl + Enter.

You can now begin typing on your new page, formatting it as you wish. You can also insert Fields from the Field toolbars within the program to merge the inspection information into your documents. See below for more information. If you wish to delete any pages from the Inspection Documents template, simply delete the text and the page break. Be sure to save the template file once you have edited the documents to your liking.

The Inspection Document Program Field Toolbars

Inspection Documents: Field Categories	▼ ×
Inspection Client Buyer's Realtor Seller's Realtor Other Referral Company Infor	rmation
Inspection Documents: Client Fields	▼ X
First Name Last Name Client 2 First Name Client 2 Last Name Company	Address City State Zip Code
Phone Number Fax Number Work Number Cellular Number	

Inserting merge fields within you documents could not be easier! "Merge fields" are any of the fields that you see on the Inspection Information screens when you run the Inspection Documents program. To insert a field into your document, choose <u>View Document</u> Field Toolbars from the <u>Documents menu</u>, or click on the Document Field Toolbar button on the left side of the screen. The Field Categories toolbar shown above will now appear. You can then select a category such as Client (shown above). Next, click your mouse cursor where you want to insert the client's first name, for example, in your document. Now click on the First Name button on the toolbar and you will see it inserted at the cursor position. When you run the Inspection Documents program, the client's first name will be inserted at this point in your document.

You can use the same fields (such as the client's first name) as many times as you like within your documents - it makes no difference to the program. Once you've inserted a field, you can change the font, size, etc. to whatever you wish. Give it a try and find out how easy it is to create new documents!

Backing Up the Inspection Documents Program

You've heard it time and time again. Back up your important files and software. Well, we're going to tell you again. **Make a back up copy of the** *Inspection Documents.dot* file whenever you make a change to the Inspection Documents template. To do this, simply copy the file *Inspection Documents.dot* to a floppy disk, or other backup media, and keep it in a place where you'll be able to retrieve it. If you do not do this and experience a hard disk problem, all of your template changes will be lost. While we can send you another copy of the program, we will not be able to recover your changes.

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APPENDIX 2: THE TEXAS WDI REPORT

Introduction

The ReportPro for Texas software also includes a program that can be used to complete the Texas Official Wood Destroying Insect Report. When the report is created, it will be saved as a separate document from the home inspection report. You will find an option to start this program when you click on the InspectIt Report Writing button \checkmark found on the desktop of your computer.

Using the Program

Running the Program

The program is very easy to complete as it utilizes many of the same functions as the inspection form such as check box controls and INFO buttons. If you create the WDI report immediately after creating the home inspection report, the client and inspection information will be automatically carried over.

The check box controls and INFO buttons are activated by double-clicking on them. For information on customizing the options found in an INFO button, this information can be found earlier in this document.

Creating a Plot Plan Drawing

On the final page of the WDI report is an area for you to create a plot plan drawing of the inspected property. The WDI report already contains some basic shapes for the building, street, direction, and text boxes to indicate areas of infestation, etc. The drawing can be further modified by using the Drawing toolbar for Microsoft Word shown - the toolbar can be accessed by clicking the button on the toolbar shown below.

	/ I	Drawing Toolbar Button	
🕙 Document33 - Microsoft Word			_ = 2
Eile Edit View Insert Format Iools Table Re	ports <u>W</u> indow I <u>m</u> ages <u>H</u> elp Ado <u>b</u> e PDF Acrobat <u>C</u> omments	Type a quest	ion for help 🛛 🗸 🗙
) 📪 Read 👳	
Culck A. + Ana · Anal · 9 · B		<u> </u>	
	TEXAS OFFICIAL WOOD DESTROYING INSECT	REPORT Page 3 of	3
	Diagram of Structure(s) Inspected		- 81
Drawing Draw • k Draw • k	੶× @ @ @ @ @ @ <u>@ @ @ @ @ @ @</u>	estation and type of insect by using the following code: ; C-Conducive Conditions; B-Wood Boring Beetles; H-	5
		E	- 81
		P	
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NORTH			
	??? Street		*

The drawing toolbar contains a selection of tools to create basic shapes, fill colors, arrows, etc. After a few minutes of experimenting, you will be able to create drawings quickly – see the Word help files for additional information.

The text boxes to the right of the drawing (containing code letters) can be moved to anyplace on the document. You can delete ones that do not apply and copy paste in as many text boxes as you need for the report.

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