



# REGIONAL DISTRICT of Fraser-Fort George

## FDM RMS User Guide

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### Inspection Module



Revised: July 24, 2014

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# Administrator Contacts

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Please direct all questions and requests to [fire@rdffg.bc.ca](mailto:fire@rdffg.bc.ca). Emails are monitored by all FDM administrators. Refer to **Basic Navigation & Use** for additional contact information.

## Introduction

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This document describes how to perform tasks specific to the Inspection Module (INS). The tabs and fields available in this module may change over time, so contact your FDM administrator if you require clarification about what they mean. For help on how to perform general functions such as adding new records and entering data, refer to **Basic Navigation & Use**.

## Overview

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The Inspection Module is where you can schedule and manage property inspections. The Inspection Module is closely linked to the **Properties Module**.

### *Before using this module you must:*


1. Contact your [FDM administrator](#) to configure your [Inspection Module options](#).
2. Set up your [inspection module pick lists](#).
3. Assign the Inspector hat to a member of your department. See the **Personnel Module**.
4. Create a property in the **Properties Module**.

**NOTE: Check your list of properties carefully before adding a new one to ensure you don't create duplicates.**

An inspection record can only be created for an existing property. There are two ways to access inspection records:

### *Through the Properties Module:*

See your inspections grouped by property.

1. Under the Properties menu, open the ALL PROPERTIES view.
2. Navigate to the property record. If it doesn't exist, you must add it. See the **Properties Module**.
3. Select the property and click the INS Event  button in the Centre Icon Bar to open the INS Event subfolder beneath the property record. All inspections for that property, both completed and pending, will be listed.

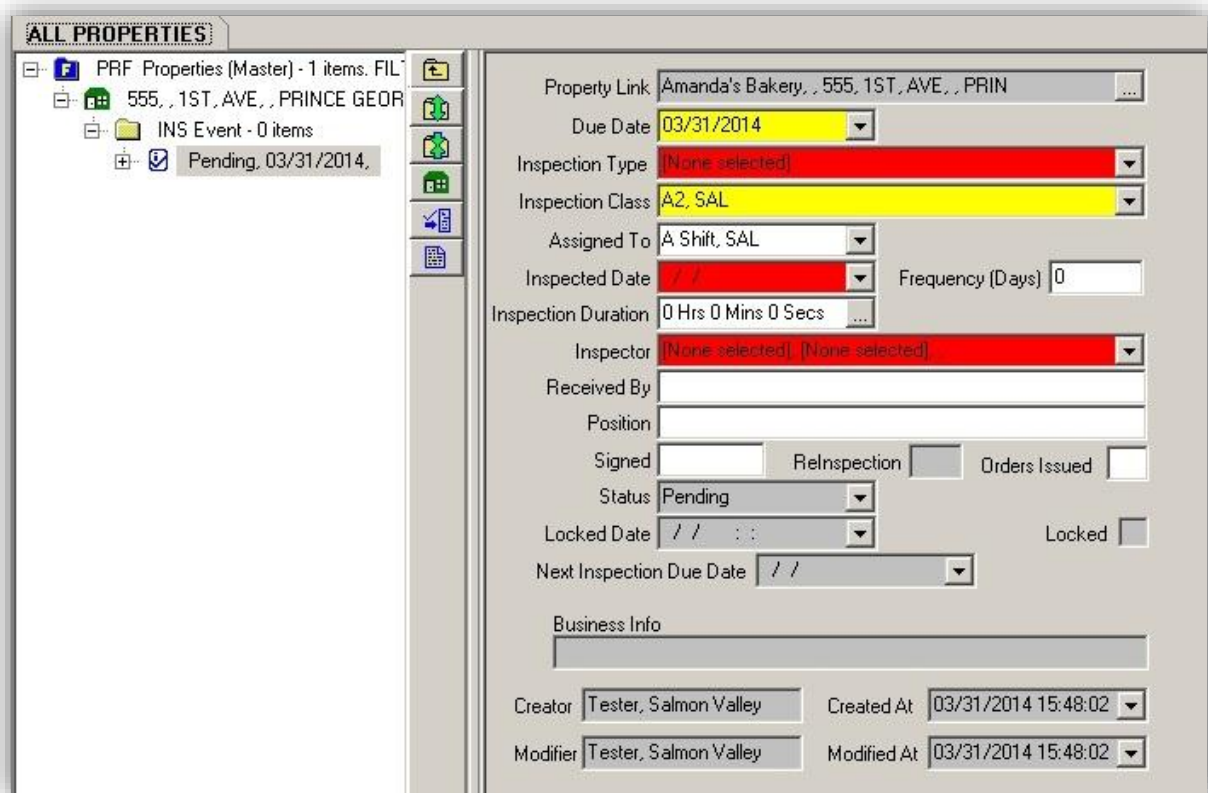
**Through the Inspection Module:**

See your inspections sorted by status and due date.

1. Under the Inspections menu, open the ALL INSPECTIONS view. You will see a list of all inspections sorted by status and due date.

**NOTE: We recommend that you create new inspections through the *Properties Module* because you can see if there are any existing inspections for that property.**

**You only need to create the initial inspection. All subsequent inspections will be automatically created upon completion (locking) of the current inspection. (See [Locking an Inspection](#))**



**Record details section:**

Component	Purpose	Centre Icon Bar
General Info Section	Basic inspection information.	n/a

**Accessible from Centre Icon Bar only:**

Component	Purpose	Centre Icon Bar
INS Event Item	Items inspected.	
INS Notes	Additional notes about inspection.	

# 1 Inspection Module Options

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The Inspection Module has several customizable options depending on your department's procedures. Contact your [FDM administrator](#) to request changes to your setup.

*The following options are available.*

1. Date of next pending inspection:
  - a. Calculated from due date
  - b. Calculated from inspected date
  
2. "Not Inspected" items upon locking of inspection record:
  - a. Ignore – won't be notified of "Not Inspected" items
  - b. Don't ignore – message will appear to notify you of "Not Inspected" items
  
3. Inspection items carried over to next inspection or re-inspection:
  - a. Only unsatisfactory items carried over
  - b. All items carried over
  
4. Inspector for next inspection or re-inspection:
  - a. Carry over last inspector
  - b. Assign different inspector

## 2 Setting Up Your Inspection Pick Lists

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
Before using the Inspection Module you will need to set up several pick lists. Please note that you require the appropriate security rights to edit pick lists. It is recommended that you work with your [FDM administrator](#) during the initial setup of these pick lists.

### 2.1 INS Items Pick List

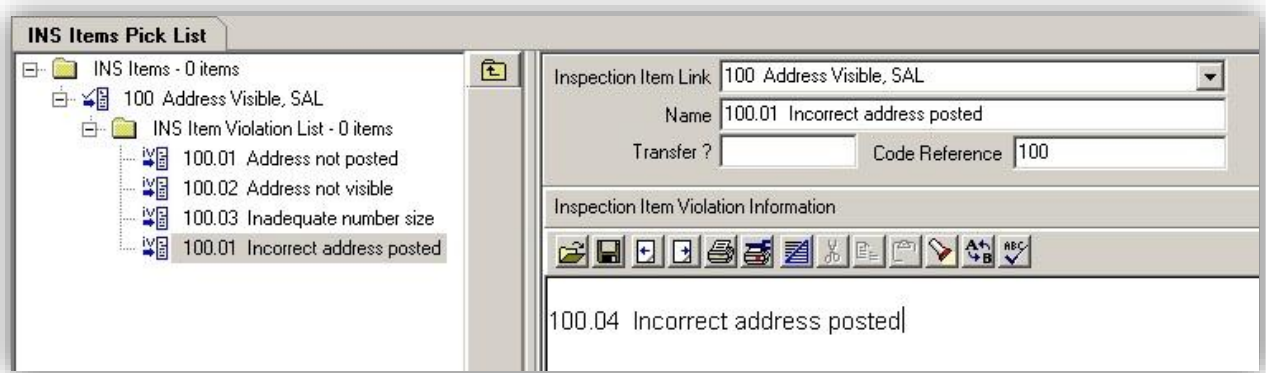
Enter the complete list of items that you may potentially inspect. E.g. "100 Address Visible".

#### 2.1.1 INS Item Violation Pick List (Optional)

For unsatisfactory items, you can import standard violation text if you have added that text to the INS Item Violation Pick List ahead of time.

1. Open the INS Items Pick List view from the Pick Lists menu.
2. Choose an item and click the INS Item Violation Pick List  button from the Centre Icon Bar.
3. Add the violations that fall under each inspection item.

- E.g. **Inspection Item:**  
                                   100 Address Visible
- Item Violations:**  
                                   100.01 Address not posted  
                                   100.02 Address not visible  
                                   100.03 Inadequate number size  
                                   100.04 Incorrect address posted
4. Leave the Transfer? field blank.
  5. Add the appropriate code reference. E.g. "100".
  6. Enter the violation text for each item.




## 2.2 INS Class Pick List

Enter your inspection classes and the frequency that buildings in each class are inspected. The frequency is used to automatically schedule the next inspection for a property at the completion of the current one. The Next Inspection field should match the class name.

### 2.2.1 INS Class Item Pick List (Optional)

You can link inspection items from the INS Items Pick List to an inspection class so those items will automatically appear in your inspection every time that class is chosen.

1. Open the INS Class Pick List view from the Pick Lists menu.
2. Choose an inspection class and click the INS Class Item Pick List  button from the Centre Icon Bar.
3. Add the items that should be linked to that inspection class.

## 2.3 INS Assignee Pick List

Enter the shifts or positions that will be assigned inspections. E.g. "A Shift", "INSP 1", etc. We recommend avoiding the use of real names in this list as members within your department can change. Please note that you will be able to specify the actual inspector's name in the inspection record.

### 2.3.1 INS Assignee Sequence Pick List (Optional)

You can rotate who is assigned to an inspection.

1. Open the INS Assignee Sequence Pick List view from the Pick Lists menu.
2. Add records to represent the order of your rotation. Make sure your last assignee links back to your first assignee to create a continuous loop.

E.g. **A Shift to B Shift**

Current Assignee = A Shift

Next Assignee = B Shift

**B Shift to C Shift**

Current Assignee = B Shift

Next Assignee = C Shift

**C Shift to A Shift**

Current Assignee = C Shift

Next Assignee = A Shift


## 3 Completing an Inspection

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There are 3 steps to completing an inspection record:

1. Enter the inspection details (inspection type, date, inspector name, etc.)
2. Assign each inspection item an appropriate status and import violations for unsatisfactory items (if you have chosen to do this step). See [Inspection Items](#).
3. Lock the inspection to schedule the next one. See [Locking an Inspection](#).

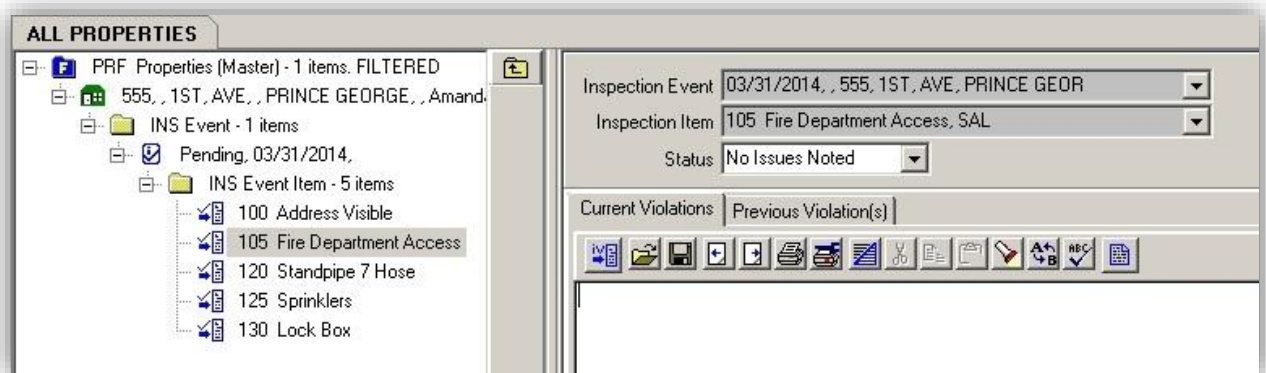
### 3.1 Inspection Items

Access inspection items for your inspection by clicking the INS Event Items  button in the Centre Icon Bar. If you've chosen to link your inspection items to an inspection class, you will already see a list of items. If not, add the items you inspected. Fill out the Status field for each one.

#### *Status Descriptions:*



- **Not Inspected:** Item was not inspected. If you don't want to keep track of items not inspected, delete the inspection item.
- **No Issues Noted:** Item passed inspection.
- **Unsatisfactory:** Item did not pass inspection. Specific violation text can be added for unsatisfactory items if you have set this up. (See [INS Item Violation Pick List](#) and [Adding Violations](#))

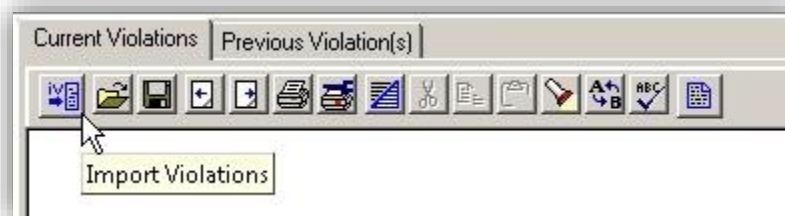
- **Does Not Apply:** Item did not apply. If you don't want to keep track of non-applicable items, delete the inspection item.



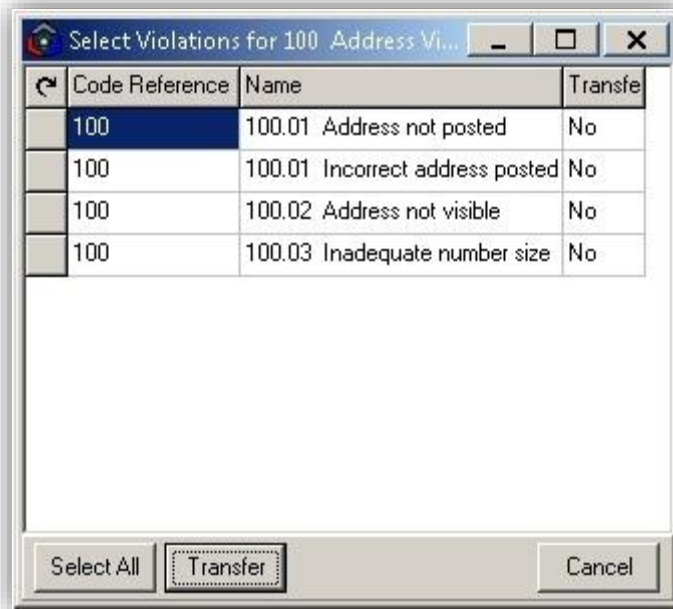
### 3.1.1 Adding Violations

If an inspection item is unsatisfactory, you can import the standard text for each violation if you have set up the [INS Item Violation Pick List](#):

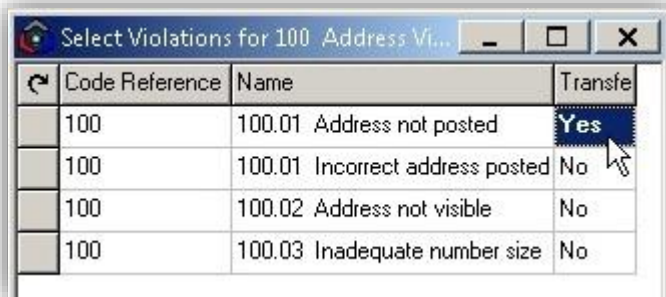
1. Select an inspection and click the INS Event Items  button from the Centre Icon Bar.
2. Select an unsatisfactory inspection item.
3. Under the Current Violations tab, click the Import Violations  button. A list of violations for that inspection item will appear.



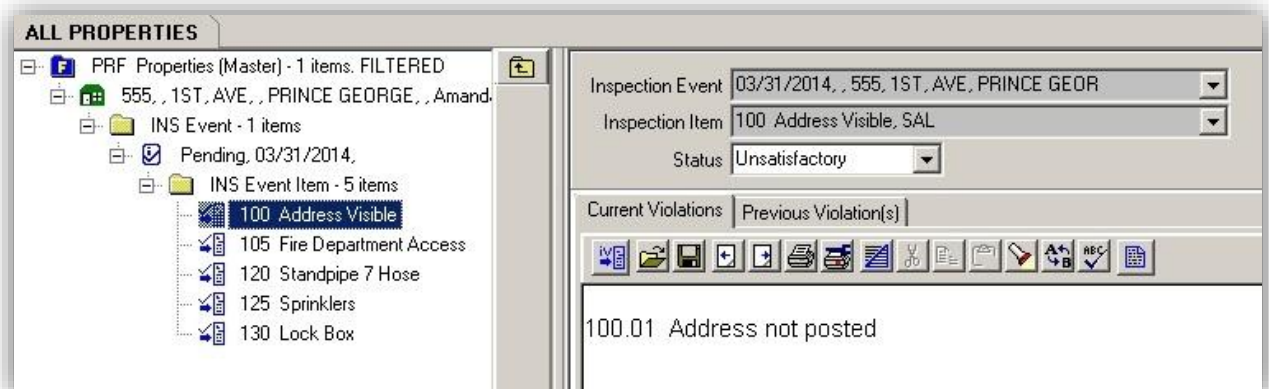
4. Select the relevant violations from the list. Violations with "Yes" will be imported.



Double-click "No" to change it to "Yes".



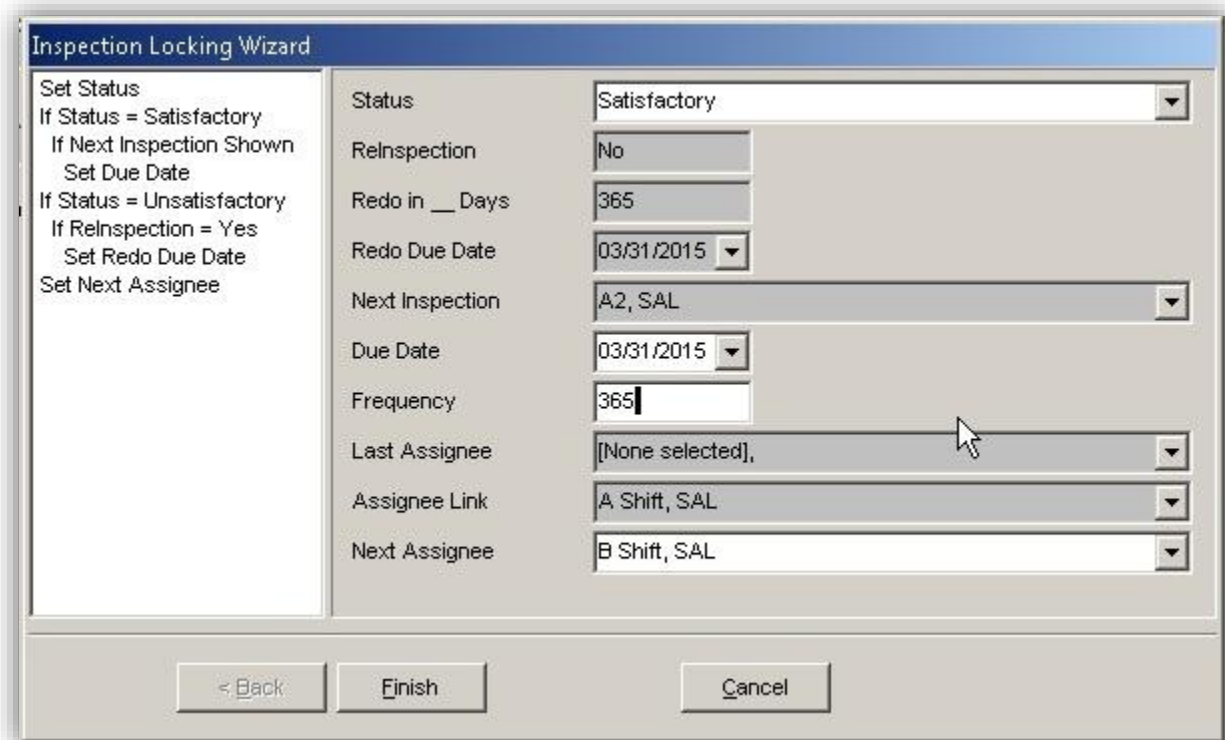
5. Click Transfer to import the violation text.



## 4 Locking an Inspection

Once the inspection has been completed, the record can be locked. When you lock an inspection record, you will be asked to schedule the next one.

1. Right-click on an inspection record and select Lock. The Inspection Locking Wizard will appear.



The screenshot shows the 'Inspection Locking Wizard' dialog box. It has a title bar and a left-hand pane with a tree view containing the following items: 'Set Status', 'If Status = Satisfactory', 'If Next Inspection Shown', 'Set Due Date', 'If Status = Unsatisfactory', 'If Reinspection = Yes', 'Set Redo Due Date', and 'Set Next Assignee'. The main area contains the following fields:

Status	Satisfactory
Reinspection	No
Redo in __ Days	365
Redo Due Date	03/31/2015
Next Inspection	A2, SAL
Due Date	03/31/2015
Frequency	365
Last Assignee	[None selected]
Assignee Link	A Shift, SAL
Next Assignee	B Shift, SAL

At the bottom of the dialog are three buttons: '< Back', 'Finish', and 'Cancel'.

2. Confirm the status of the inspection. This will determine whether the next inspection scheduled is a re-inspection or a regular inspection.

**NOTE: It is possible to make the overall inspection as "Satisfactory" while having unsatisfactory inspection items.**

3. Confirm the due date, frequency and next assignee for the next inspection. You may adjust these as necessary.
4. Click Finish. This inspection is now complete and a new Pending inspection or re-inspection record has been created for the property with the due date you specified in the Inspection Locking Wizard.

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