

# Introduction to Identify & Report v12, Home and Property Inspection Software *iPad, Mac, Widows*

New Inspection, Print Inspection and  
*Copy Files to and from iPad and Computer*

## Step By Step: Start New Inspection

1. From the “ Main Menu” screen **Select** the “ New Inspection “ icon
2. Enter Inspection Report I.D. (sample Last Name Smith, Inspection Date 05/15/2012, Report ID = “Smi05152012” **Use this Format Only**) **Click**, Continue with Default Report. Note: The **Default Report** is the **Master Template** that gets copied when you Click Continue with **Default Report**. This **Default Report** can be edited to fit the Inspectors needs by Selecting, from the Main Menu the “ **Find**” icon then Select the **Default Report**.
3. This will bring you to the “Order Form”, Enter the Order Form information.
4. **Click** the “ To Current Inspection “ icon to View the Report Menu.
5. From the “**Report Menu**”, Select the category you would like to Identify then Select the Comments that apply to your inspection. (sample, category KITCHEN, fill in the Identifies, then Select the Sub-category Tab at the Top of the Screen, SINK, Select Comment that applies). **Note: “Menu Select” icon in the upper right of the screen will allow you to view All Inspection Category and All Sub-Categories on the same screen and jump from any Sub-Categories with just one Click. A good tool to use as you walk through your Inspection.**
6. After you have Entered your Inspection Report Information and Photos (see Photo Information below), **Click** the “**ADD Comments to Summary**” icon in the lower right of the screen to build the **Inspection Summary**. At any time **Click** the “To Summary” icon to view the **Summary page**.

## Step By Step: Print Inspection Report

1. From the “**Main Menu**” screen if the current Client displayed is the Inspection Report to be printed, Select the “**Printer**“ icon. Or Select the Find icon and Select Inspection to be Printed, then **Click** on the “**Printer**” icon.
2. Select the “PDF Factory” as the Printer. Select “Continue”. The Inspection Report will start to be built. You will see the Cover page displayed, you can select the Page to view on the left of the PDF Factory screen.
3. To make a PDF file Click the PDF icon in the upper left of the screen. The Inspection Report will be displayed in a PDF Reader.
4. To Save the PDF Inspection Report, Click, File in the upper left corner of the PDF Reader screen, then Select, Save As PDF. Use the Report ID as PDF File name. (sample: Smi05152012.Pdf).
5. Give the Inspection Report a Name, and save to a Folder ware you know ware to Select if you need to Email the New PDF Report.

## Interdiction to Identify & Report

Copy Filest to and from iPad and Computer

### Step By Step: Copy Inspection Files to and from Computer and iPad

1. Exit out of Identify & Report by Clicking the “**Exit**” icon on the Computer and the iPad.
2. Plug the iPad into the Computer via the iPad USB cable.
3. iTunes may turn on automatically if not Select iTunes form your Desktop or **Click START**, on the lower right Of the iTunes screen
4. The iTunes screen will display.
5. Look on the left side of the iTunes screen for “**Device**” and **Click** on the iPad.
6. The iPad information will be displayed,
7. Select **APPS** on top of the iTunes screen.
8. The iPad screen will be displayed, scroll down to the bottom of the screen until you see the “**FileMaker Go**” icon. **Click** on the **FileMaker Go** icon.
9. A Gray area will open, with a file or two displayed.
10. **Click** the **ADD** button on the lower right of the iTunes screen. A new window will open for you to select the file to Add.
11. Select the Folder ware Identify & Report is installed. (sample: **c:\users\yourName\Identify Report v12.0\**)
12. Select All Files that End with **.Usr** or **.Fp7** (sample: **Inspection Control.Fp7** or **Inspection Control.Usr**) or (**Texas Inspection.Fp7** or **Texas Inspections.Usr**)
13. The first time you need to Add All the Files that end with **Fp7** or **Usr**.
14. After the first install, Add or Save Only a few files. (For Identify & Report Professional) Select “**Inspection Control** for the Order Form, **IsdcNarrative** for **Narrative Report Data** , **IsdcNarrative Photos** for the Report Photos, **IsdcLookUp** for the Comment’s Data.) For Identify & Report TEXAS (**Texas Inspections** for the Report Data and Report Photos, **Texas LookUp Comments** for the Comment’s data)
15. **Keep in mind the same process is used to copy files From the iPad to the Computer by using the SAVE Command. (SAVE To COMPUTER)**
16. **Keep in mind the same process is used to copy files From the Computer to the iPad by using the ADD Command. (GET From COMPUTER)**

This document is to show you how to  
“Creating an Inspection”  
using the  
*Identify & Report  
Professional v12.00*



A professional inspection is as easy as one click.

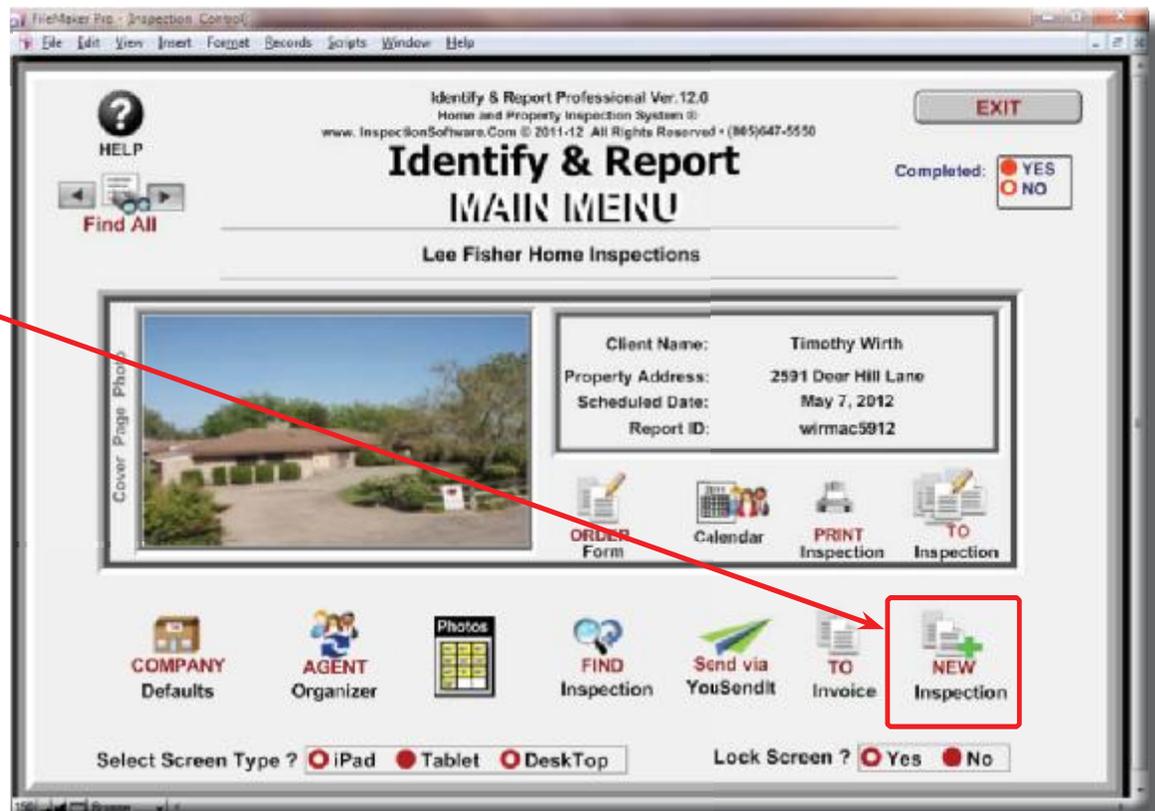
The *Identify & Report Professional* inspection program is designed to create professional inspections each and every time. The program uses a Default Report inspection as a standard template for the creating inspections.

This Default Report inspection may be modified to meet the user's requirements by selecting the Default Report at the Find Inspection screen and entering/editing data as desired.

The Default Report is essential to the operation of the program and should never be deleted.

### Starting an Inspection (non-template)

1. Click on the “New Inspection” button at the Main Menu.

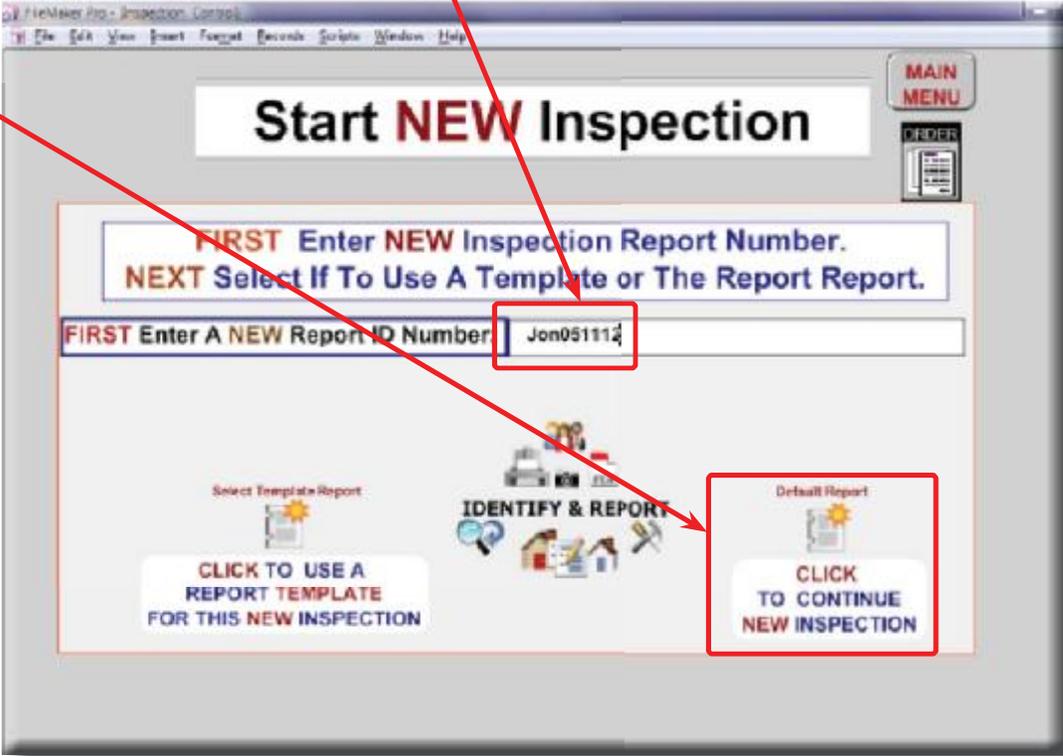


2.  
First Enter a New Report ID Number:

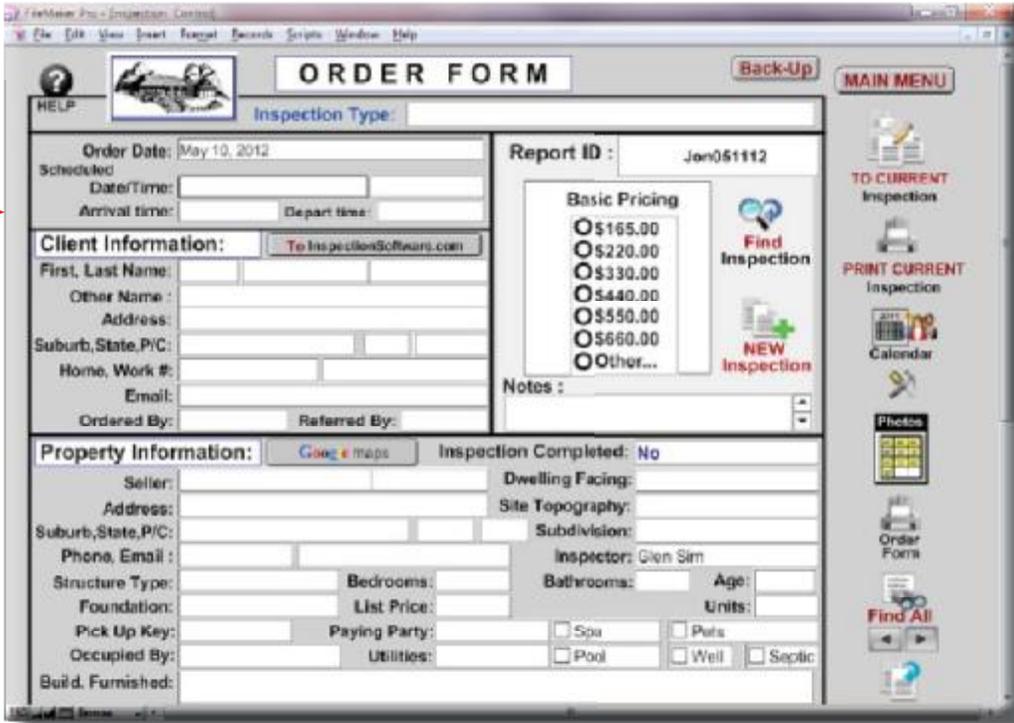
|  |  |   |
|--|--|---|
| <p><u>The best ID Report Number Format</u><br/>Use the first three letters of last name then the date of the scheduled inspection.</p> | <p>Example:<br/>Client's name: Bill Jones<br/>Scheduled inspection date: May 5, 2012<br/>Recommended ID Number<br/>Jon051112</p> | <p>If you are inspecting Mutable units just Add u1, u2.etc...<br/>Jon051112u2<br/>Jon051112u2</p> |
|--|--|---|

3.  
Select continue

**Very important:**  
Only use Letters and Numbers for Report ID Numbers.  
The program does not recognize punctuation mark, spaces and special Characters.

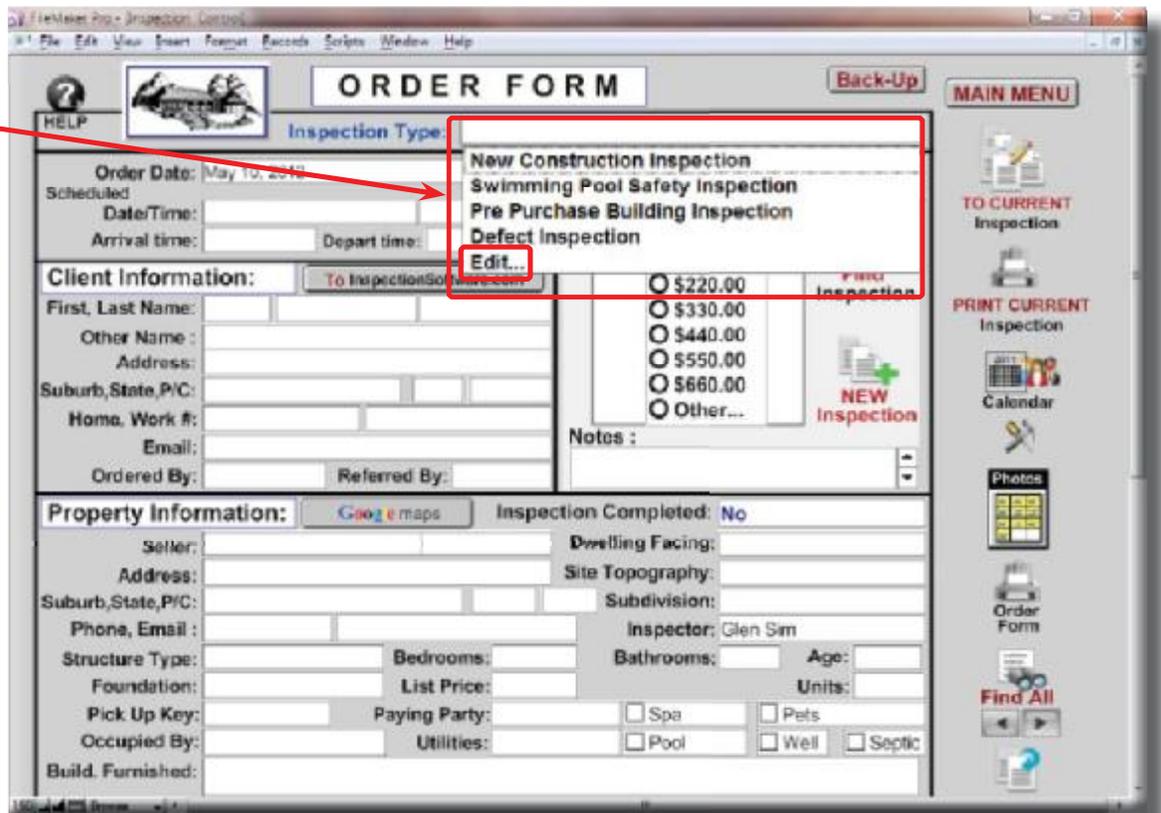


4.  
Enter required information on the order form.



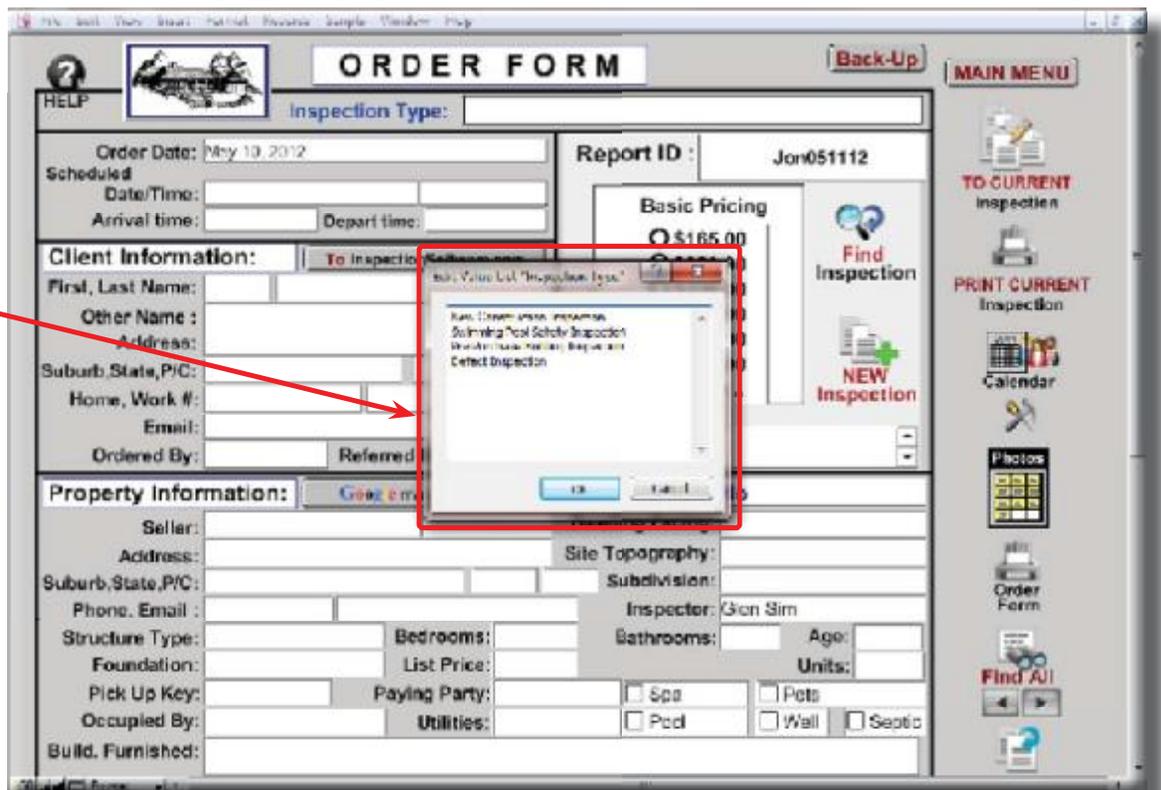
5.

All drop down's Boxes have the ability be edited.



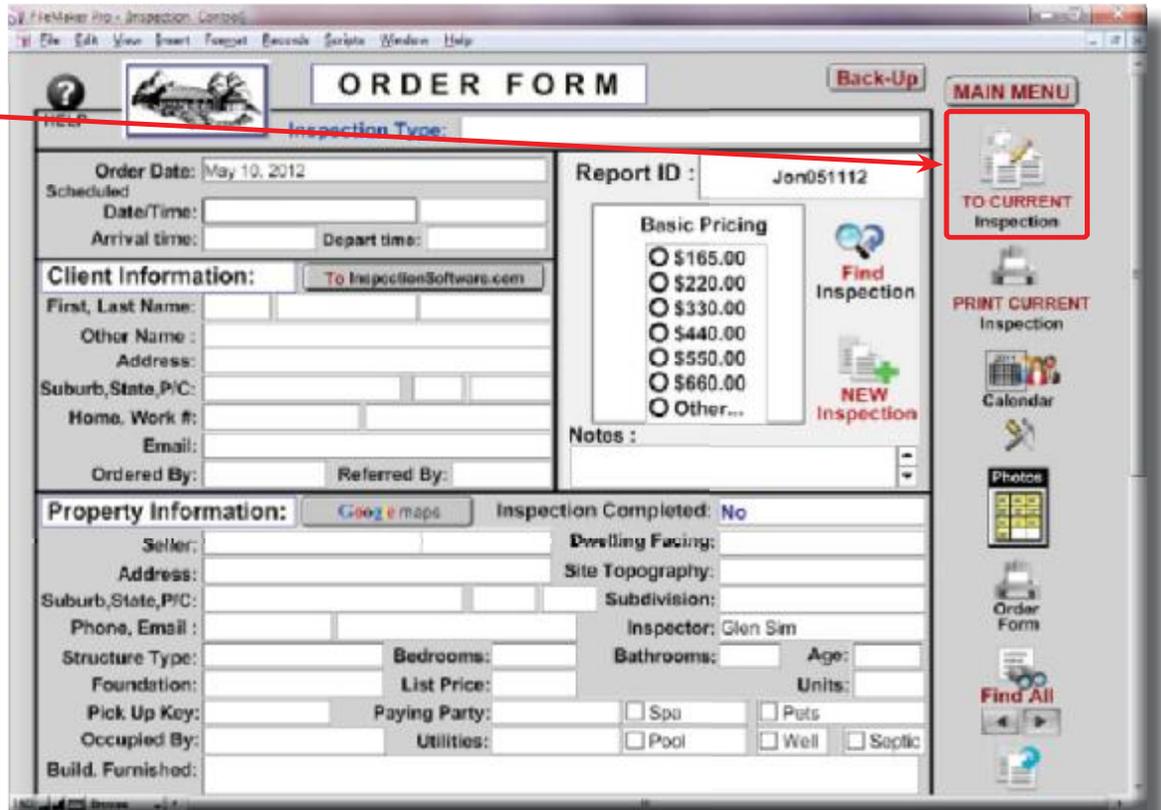
6.

The edit window will open, you can remove, add or modify any statement as you would like. Then reselect the field to auto enter the information.



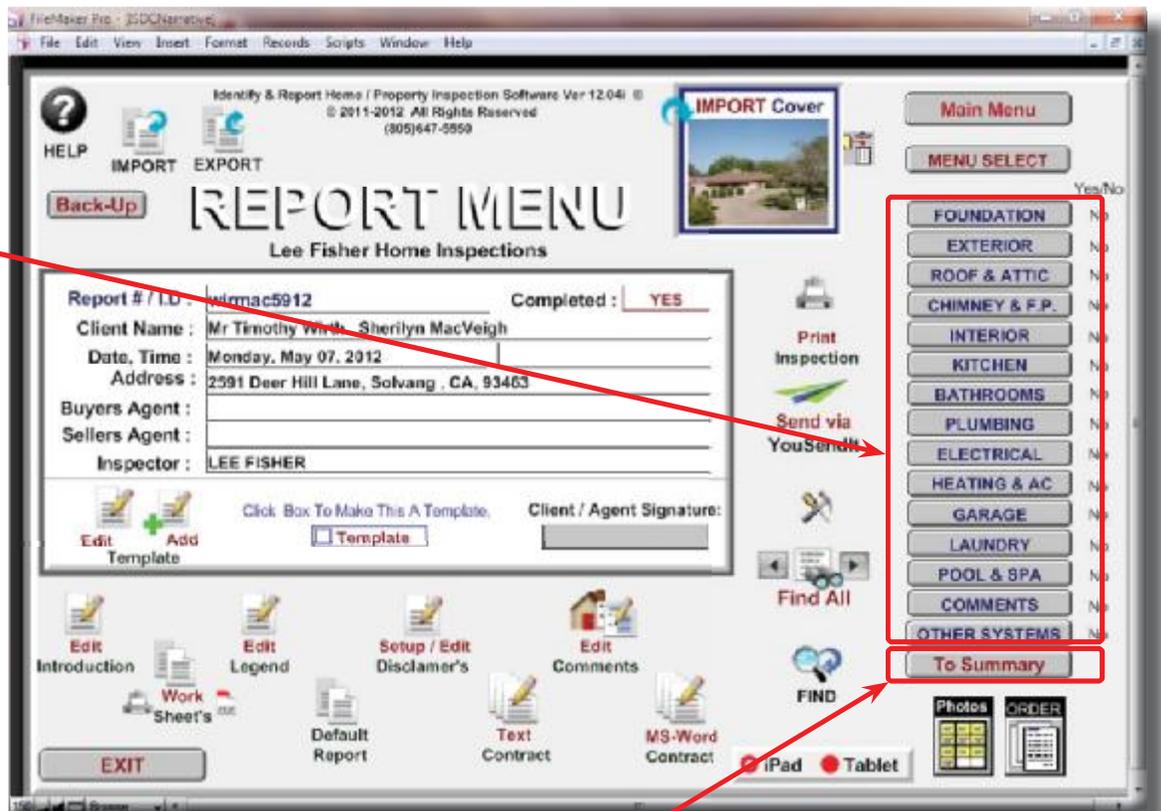
7.

When you are finished filling in the Order Form click on “TO CURRENT Inspection” icon.



8.

On right side of screen, you will see a column of buttons listing the main inspection categories each categories has sub categories, select as needed



9.

At any time you can select the “To Summary” button to view summary.

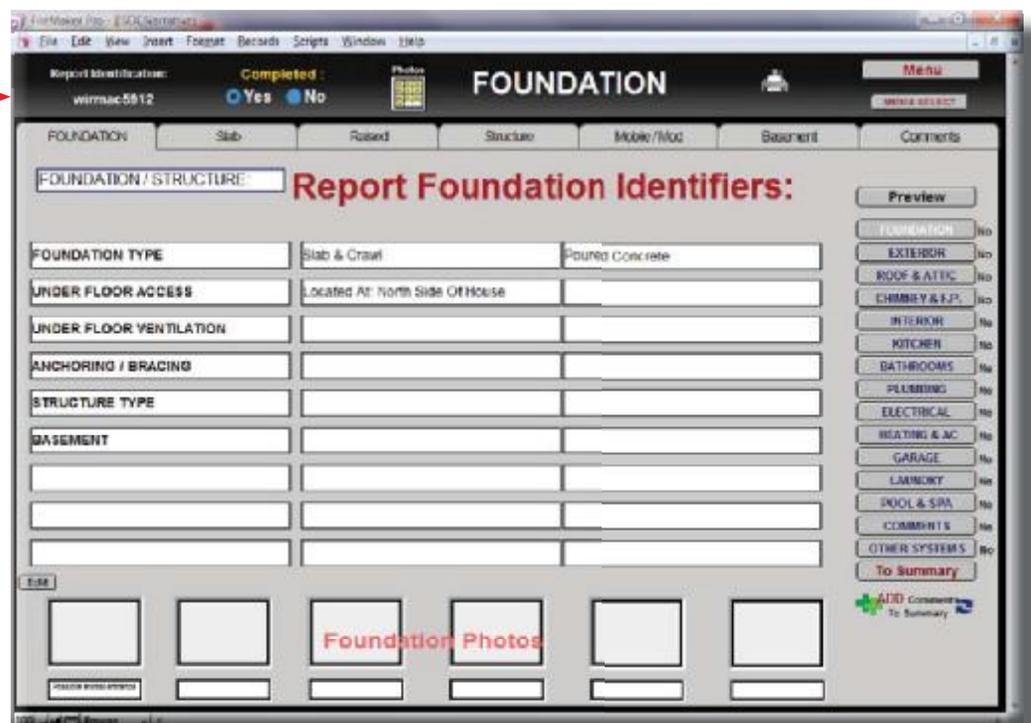
This document is to show you how to  
“Select Report Category”  
using the  
*Identify & Report  
Professional v12.00*



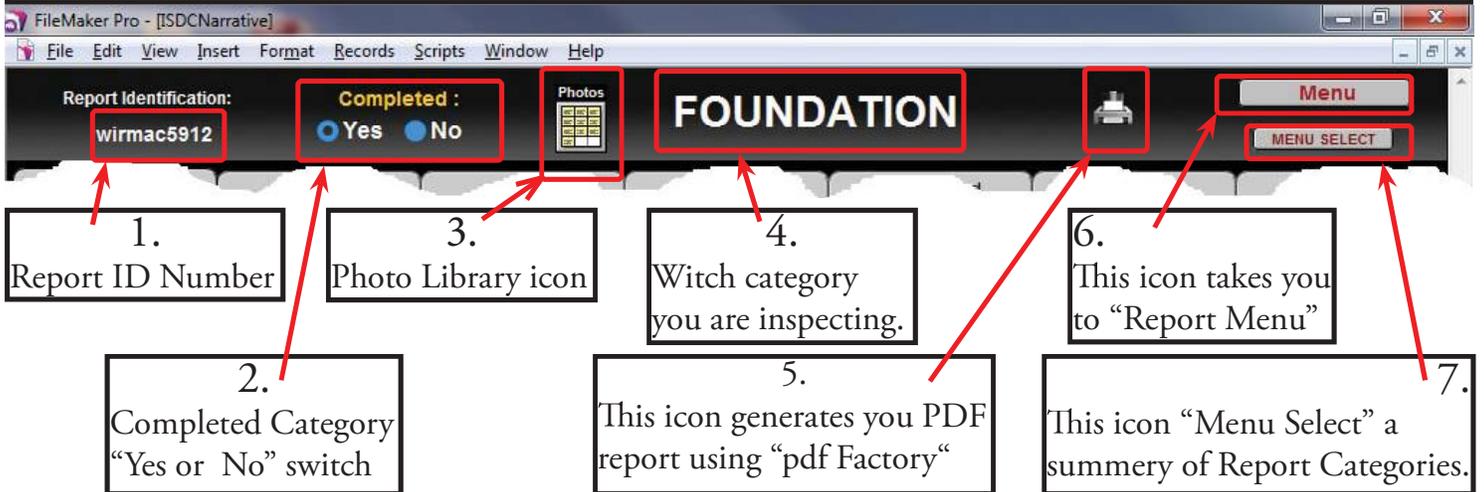
Click on icon of  
category  
Example:  
For this example we  
will use “Foundation  
Identifiers”



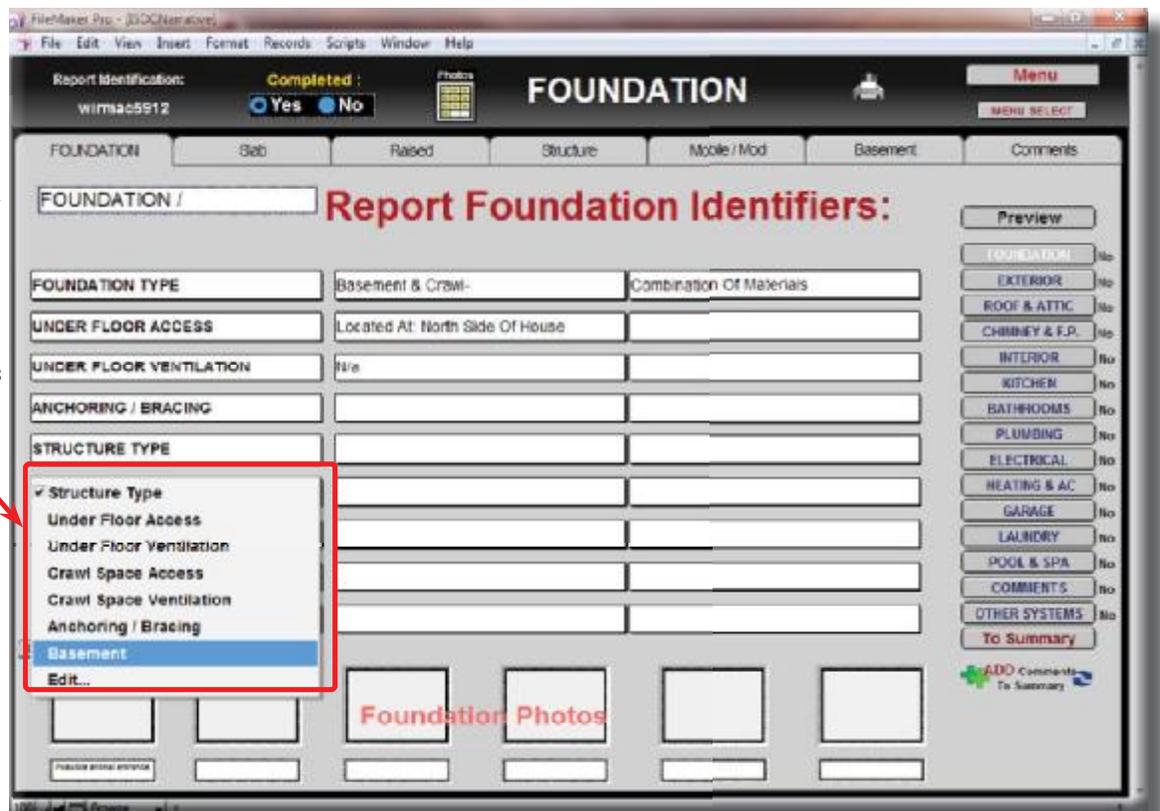
The “Foundation” category  
window opens.



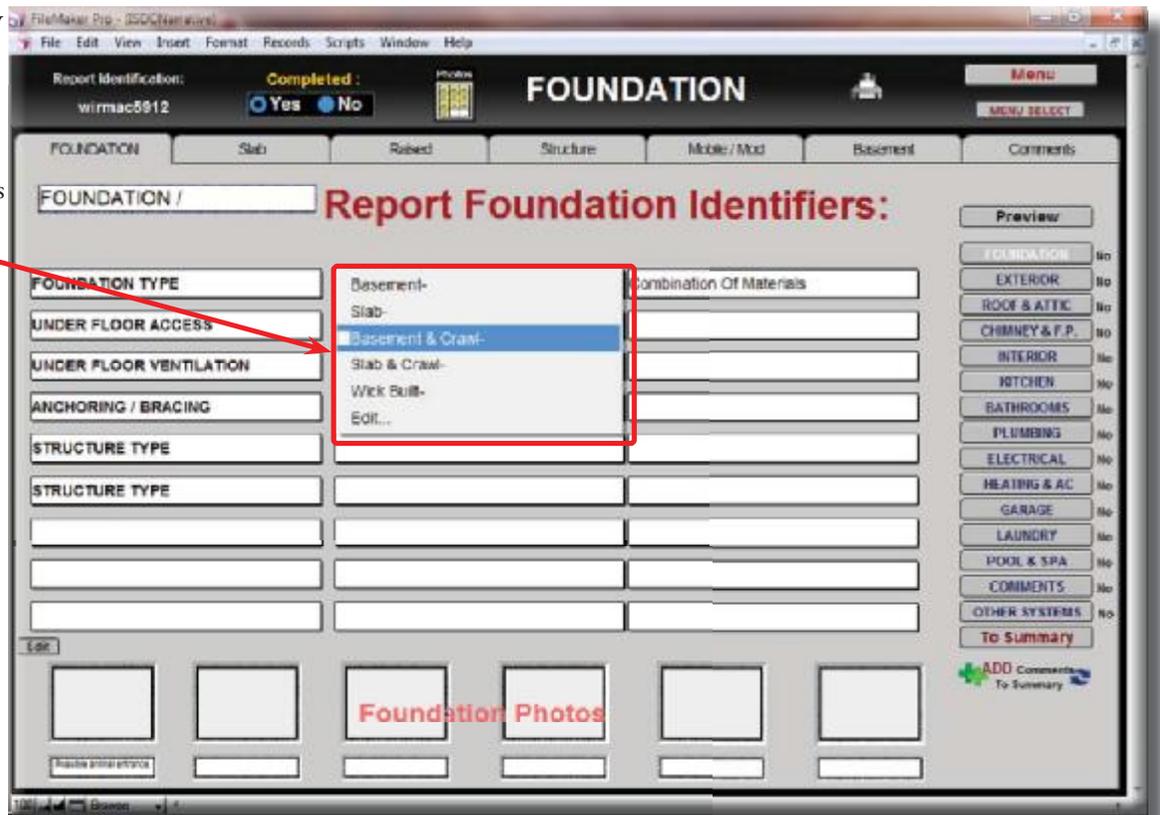
# Header Layout



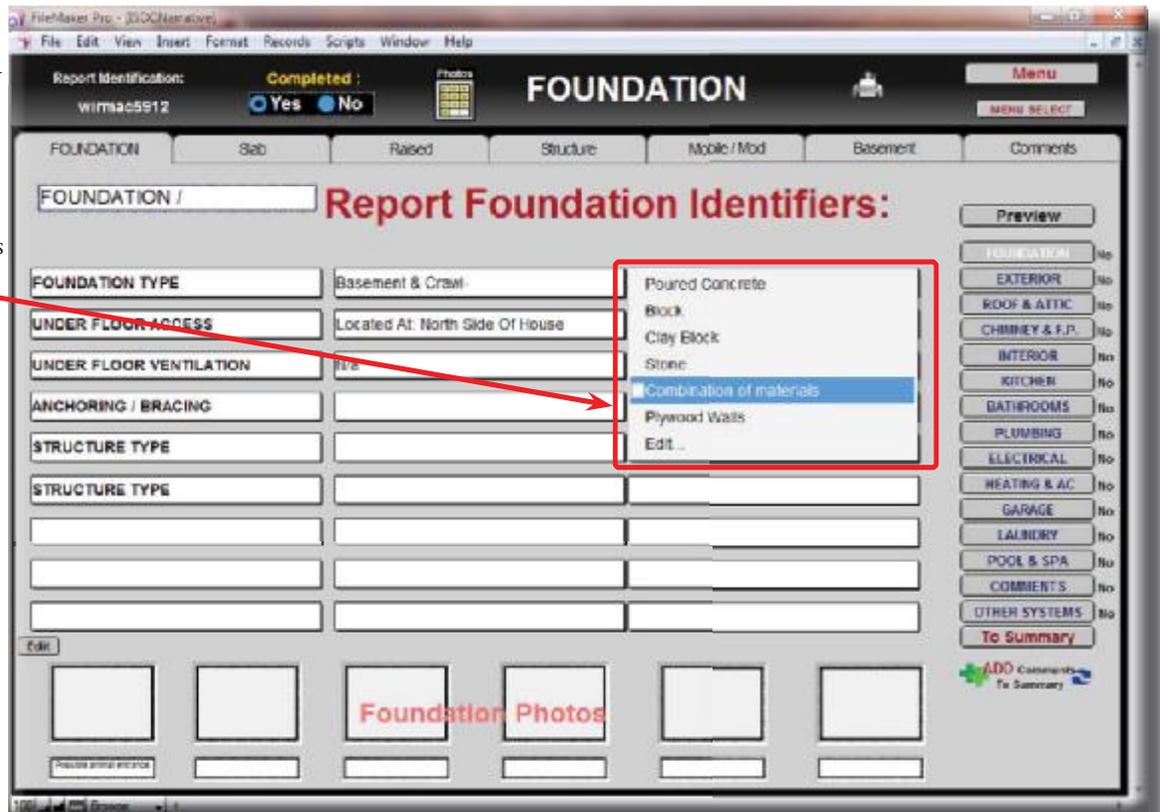
In the category window the columns are the identifiers, click in box and a drop-down then chose. (All drop-down boxes are Editable)



In the category window the columns are the identifiers, click in box and a drop-down then chose. (All drop-down boxes are Editable)

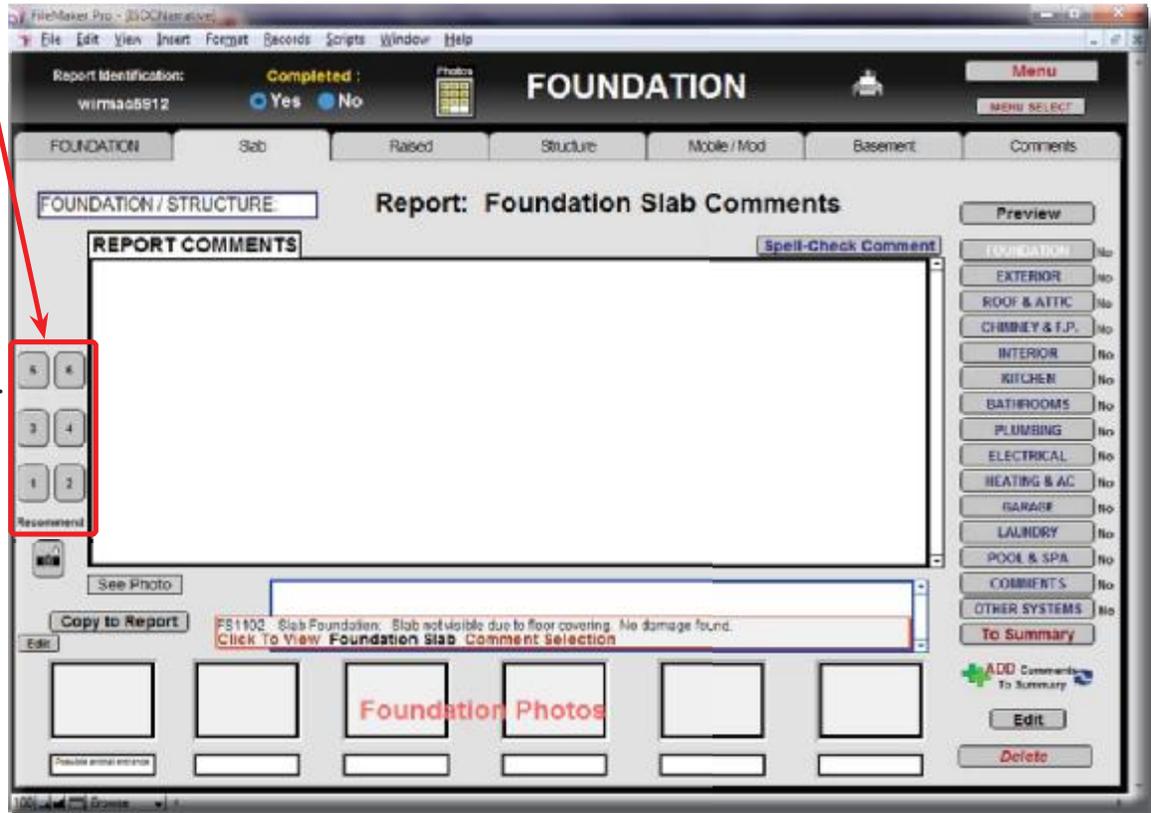


In the category window the columns are the identifiers, click in box and a drop-down then chose. (All drop-down boxes are Editable)



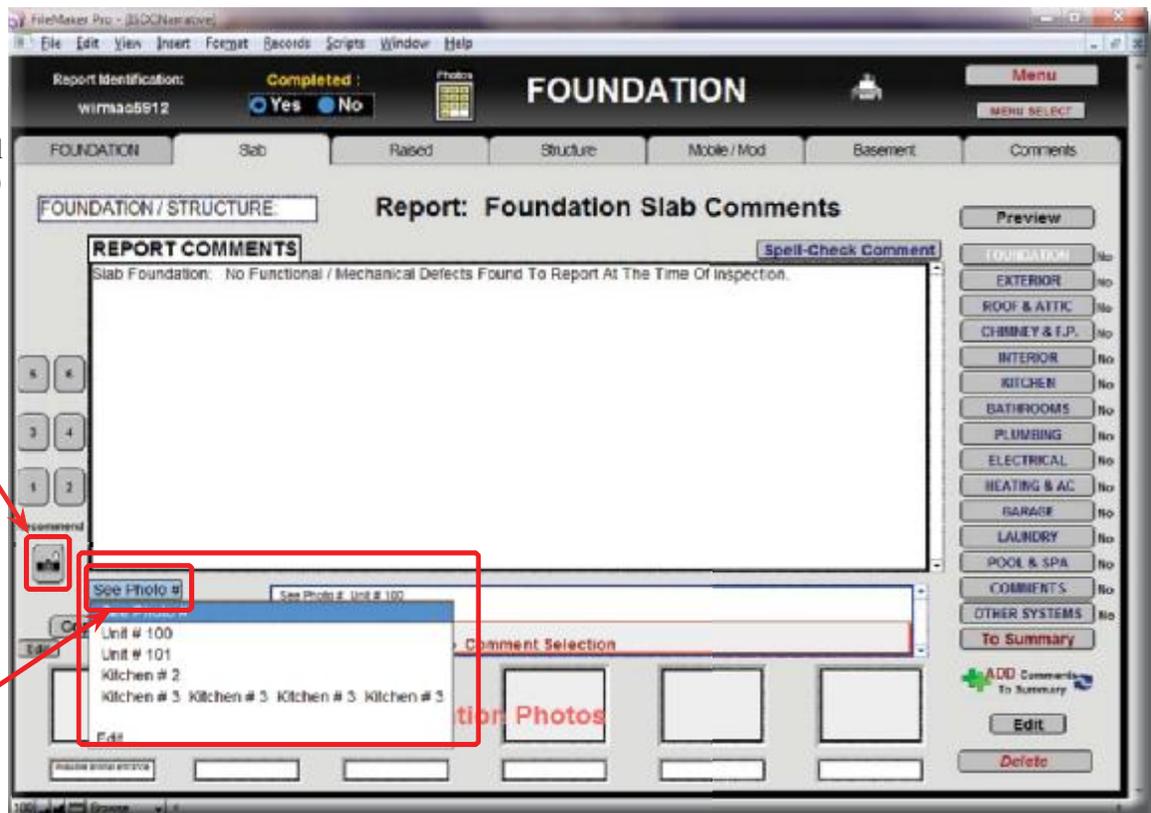
# Getting around Report Comments Window

- Recommend Buttons
- 1= MAJOR DEFECT
  - 2= MINOR DEFECT
  - 3= SAFETY HAZARD
  - 4= Recommend Evaluation By A Qualified Licensed Contractor / Engineer / Specialist.
  - 5= Recommend Evaluation of infestation / deterioration by a Licensed Pest Inspector.
  - 6= Recommend Evaluation or repairs by a Qualified Licensed Contractor



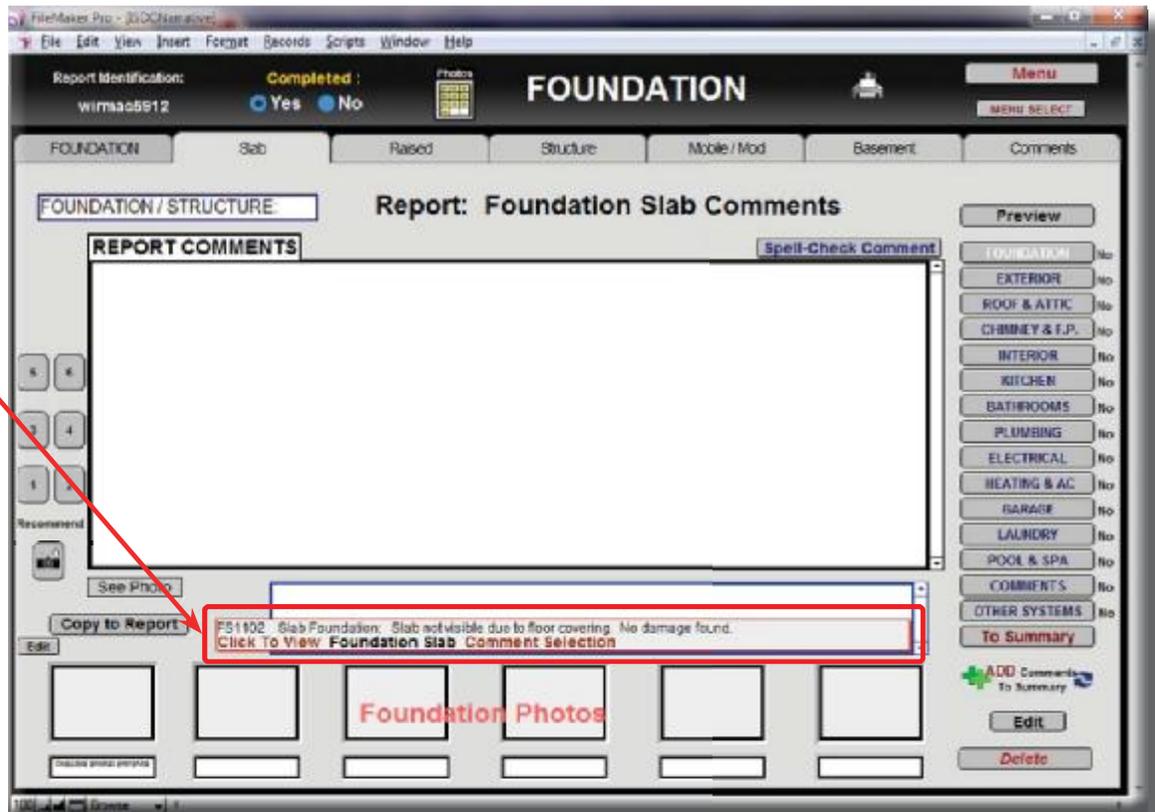
Note: To edit "Recommendations" select Default Report.

The Camera icon will take a snapshot of whatever you select in this drop-down box. (All drop-down boxes are Editable)

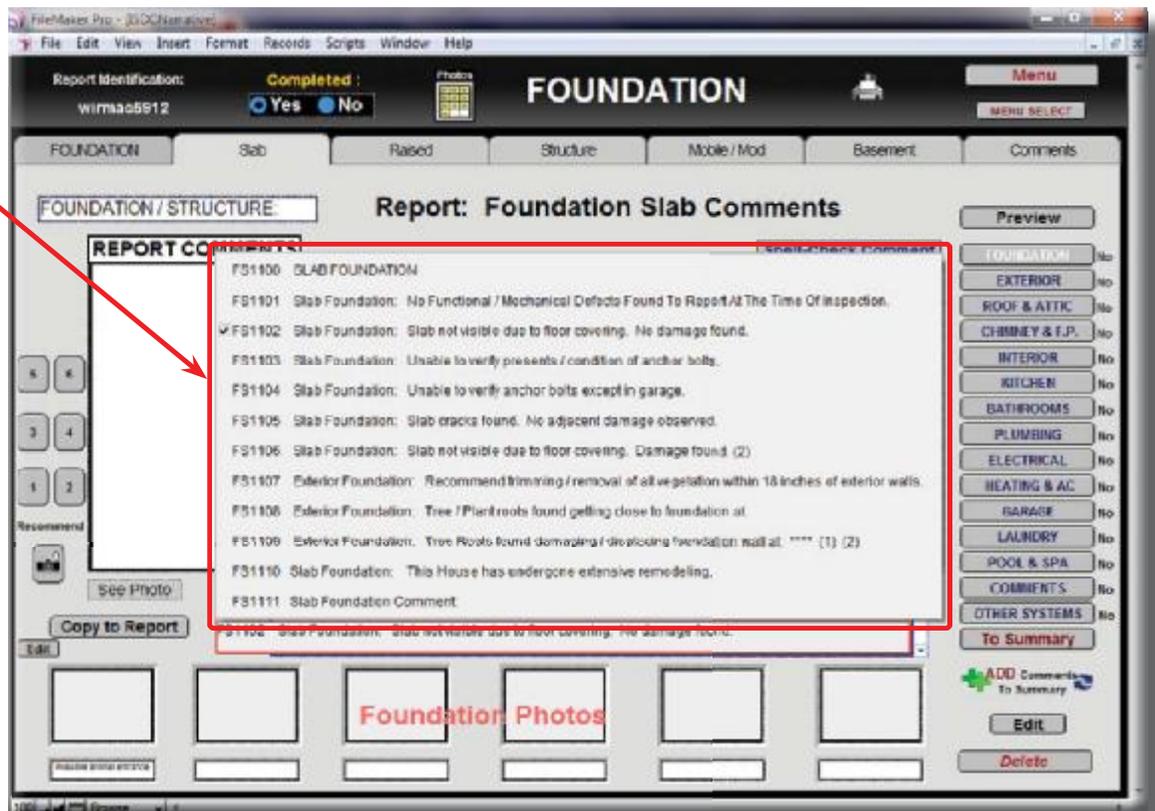


The Camera icon will take a snapshot of whatever you select in this drop-down box.

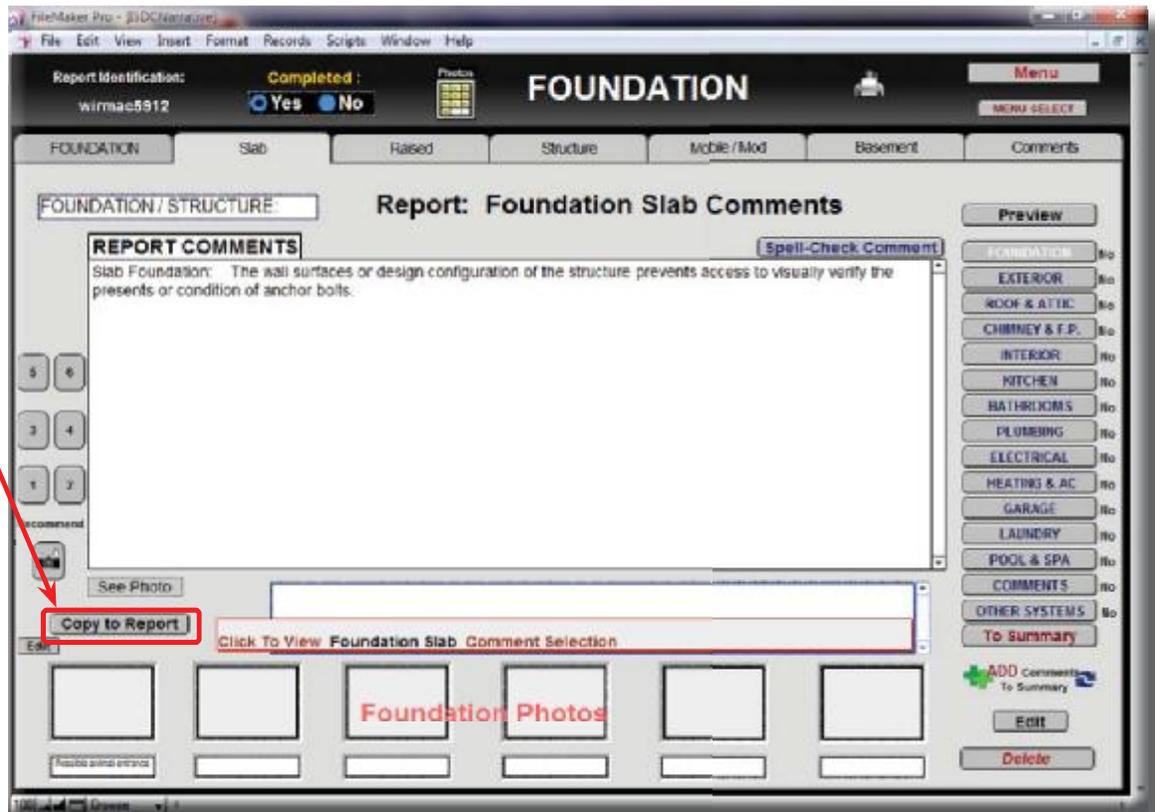
Click in Box  
"Click to view slab  
Comment selection"



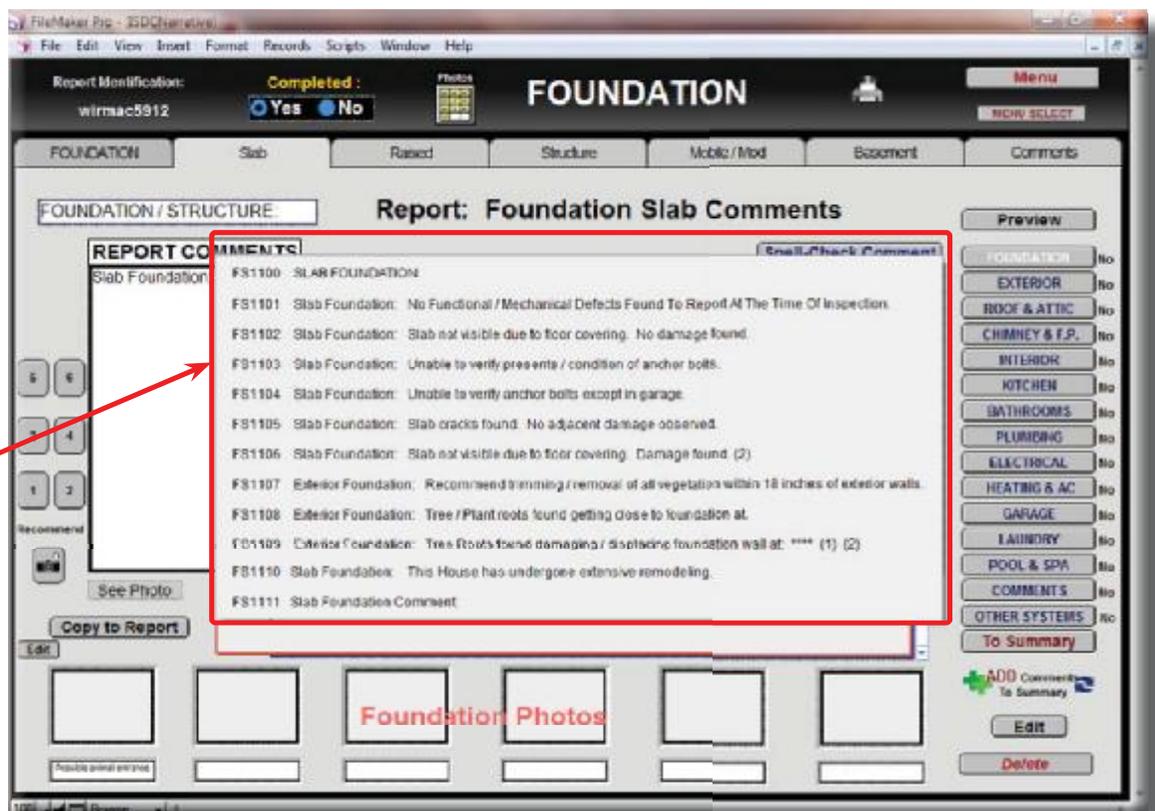
Chose the comment  
from the list that you  
have view.



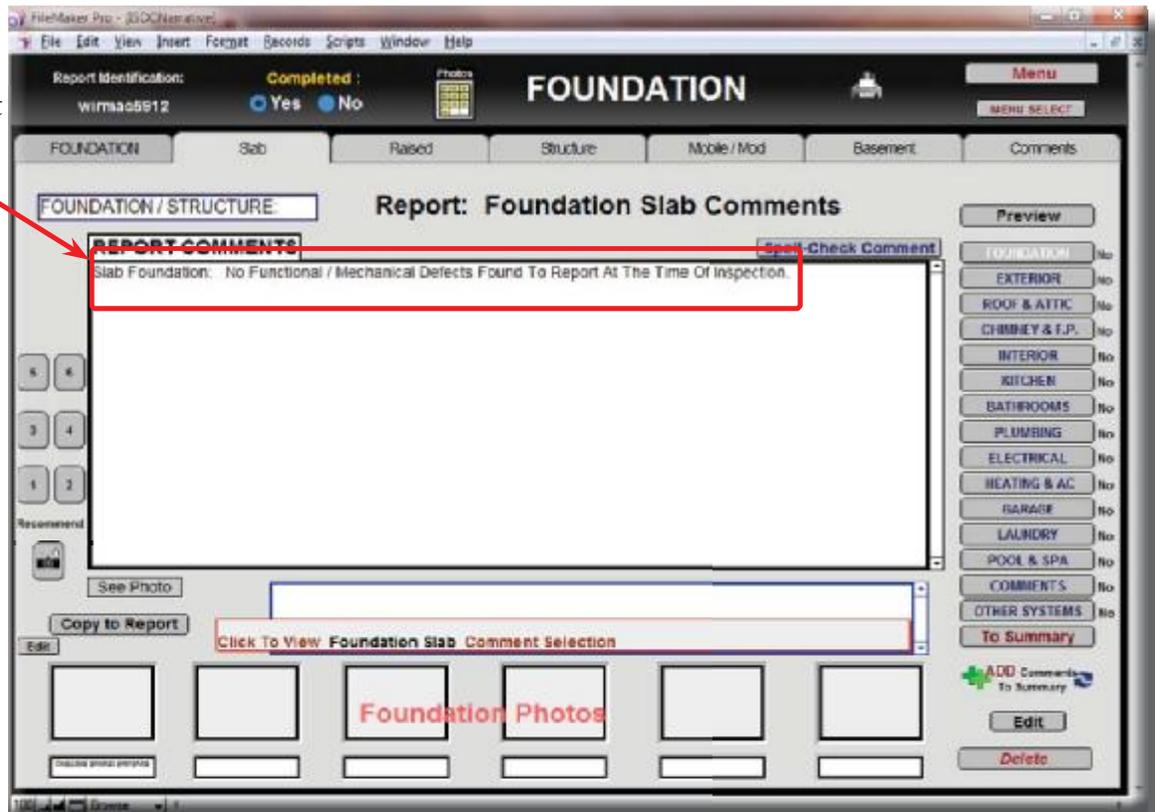
Click the  
The “Copy to Report”  
icon will also copy the  
Recommendations to  
the Report.



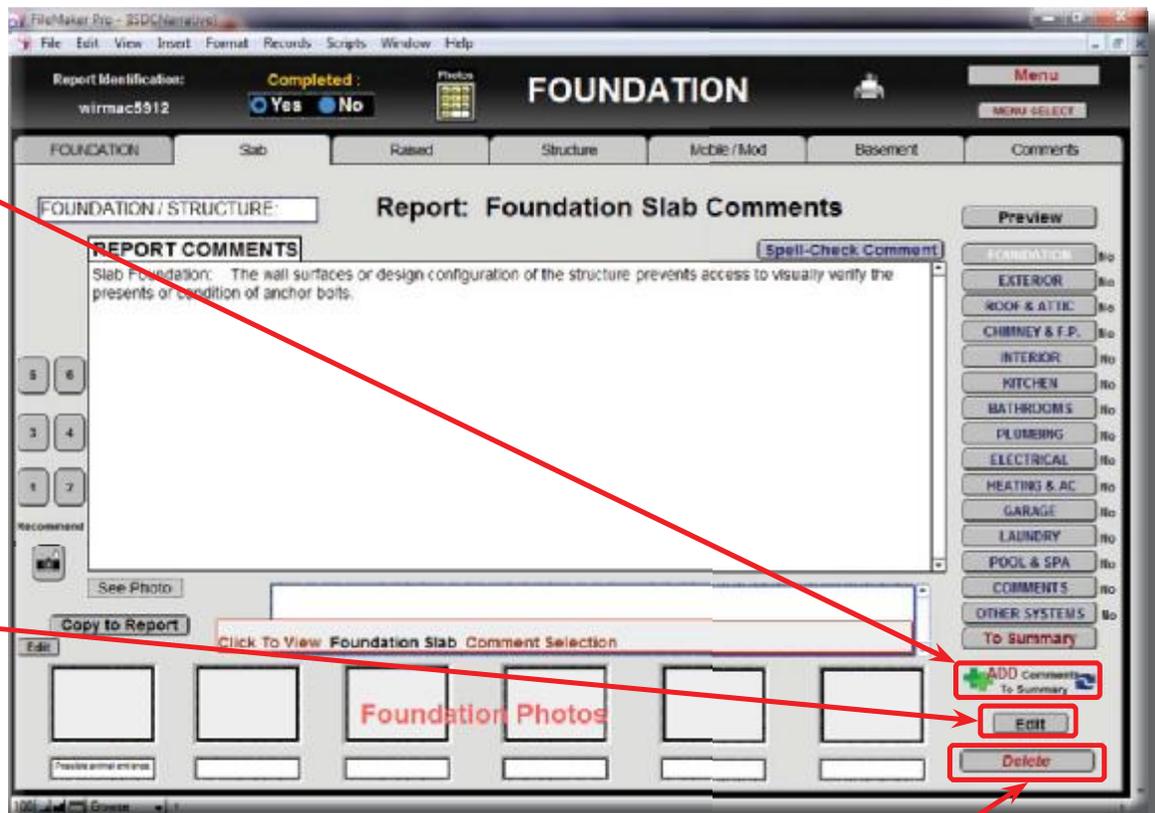
The list of comments  
pops up again so you  
can chose another  
comment to build the  
report.



This will place the comment you have chosen into the "Report Comment" area.



When you are finished with your comments at any time Click "ADD Comments to Summary"

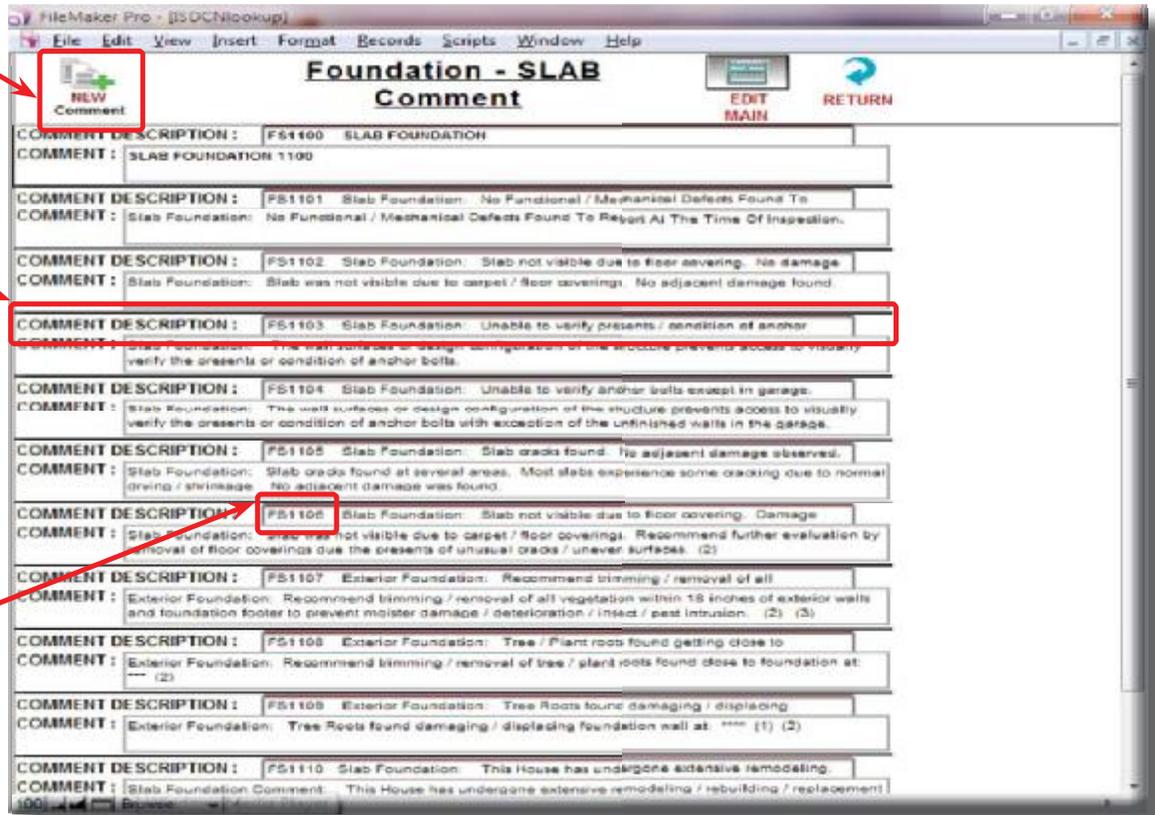


To add, edit or remove you comment list click the "Edit" icon. This will open the Edit you comment Lookup Library Window. (See "Comment "Lookup" Window" below)

The Delete icon will delete all content from any field selected.

# Comment "Lookup" Window

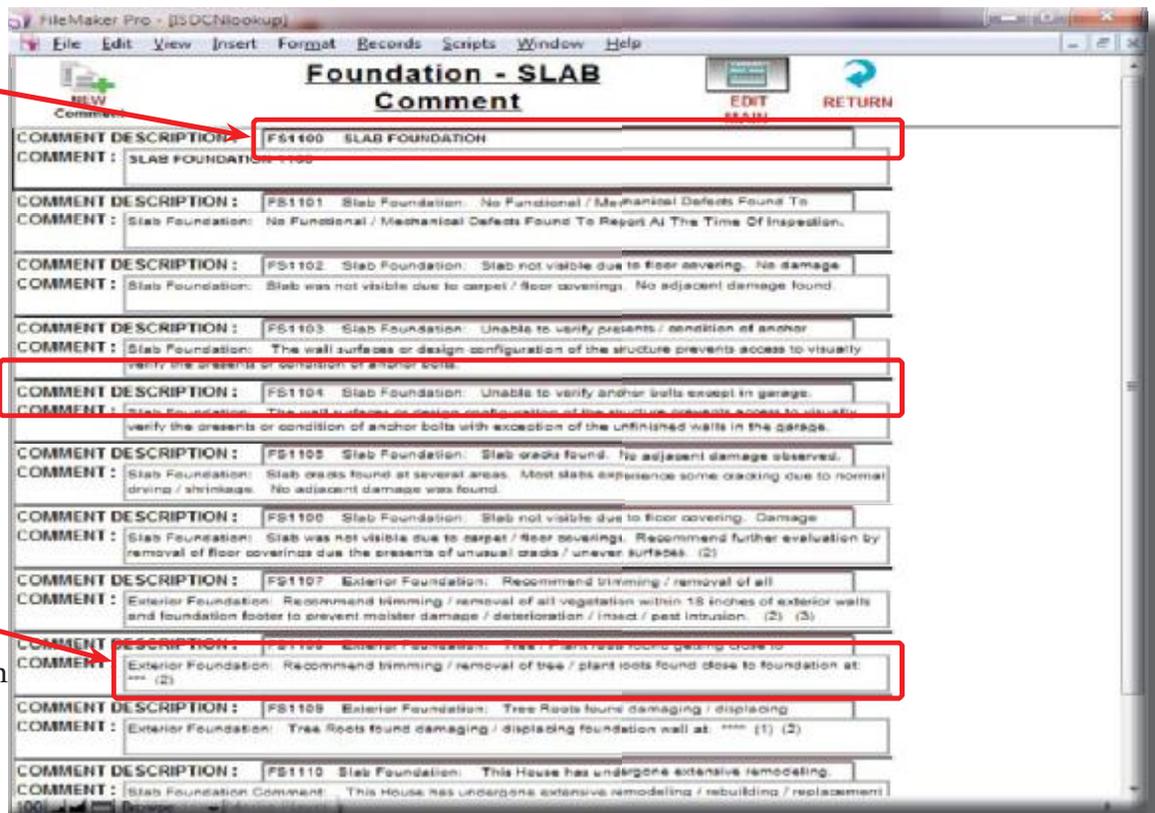
Add New Comments icon



In the Comment Description, window is the description seen when you select, new comment on the Report Entry screen when selected.

All Comments are sorted by the first Numeric number.

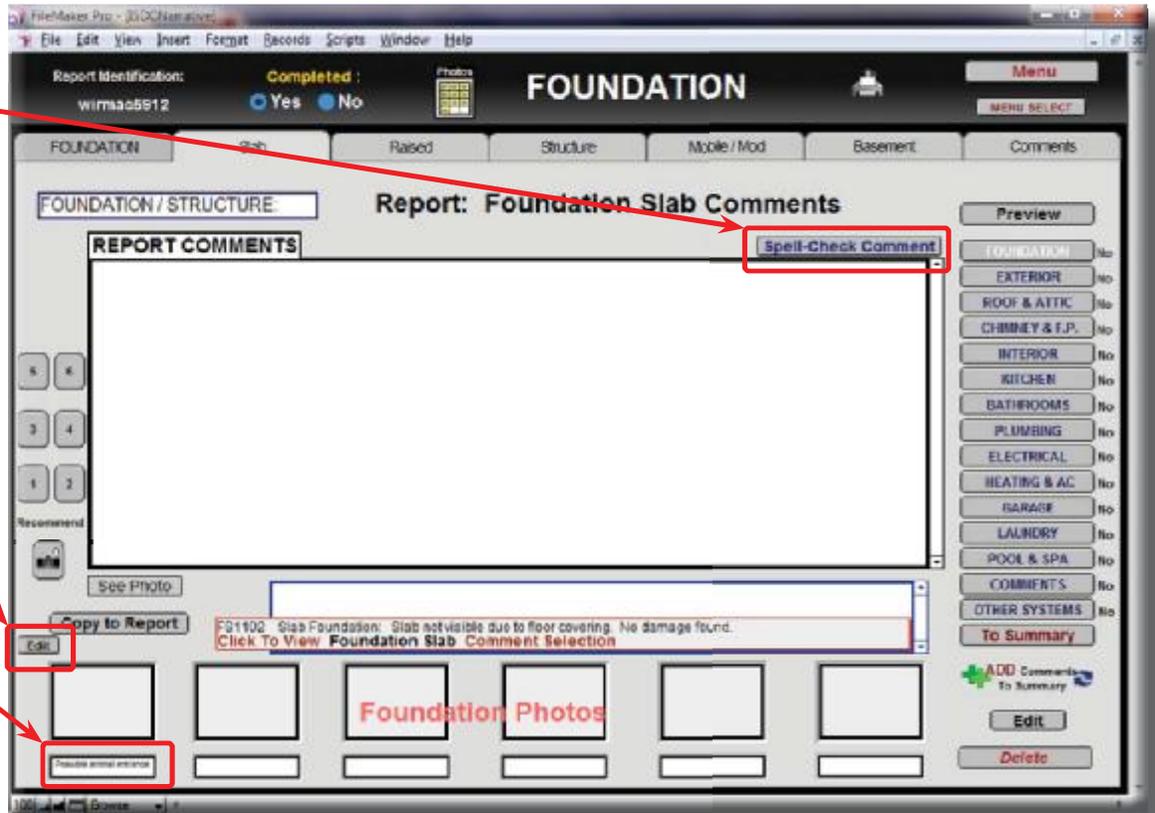
Keep your description short.



The Comment Windows is your complete comment

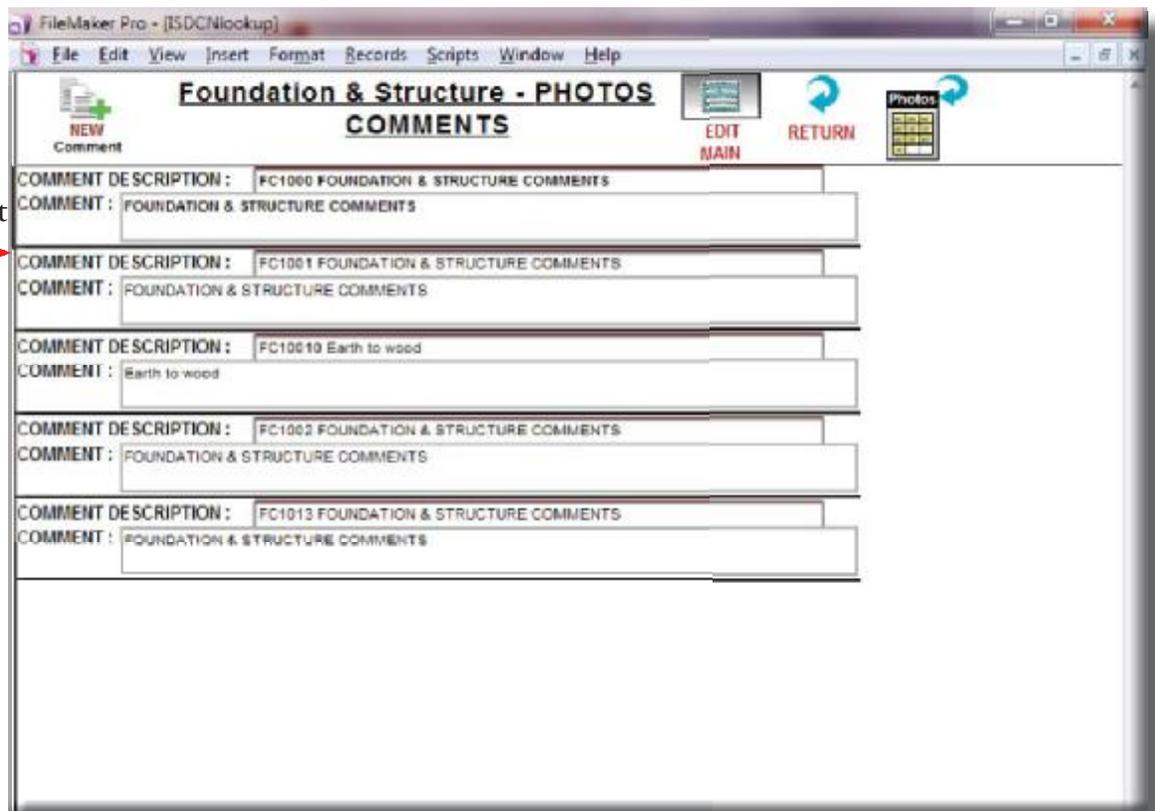
To modify an existing comment just click in the box and edit as desired when finish with changes make sure you click outside of field to save changes.

The "Spell-Check Comment" icon checks spelling in "Report Comments" Window.



This "Edit" icon edits "Photos Comments" for the category you are Inspecting.

Comments for Photos.



To edit "Photos Comments" Window see "Comment Lookup" Window

# Photos

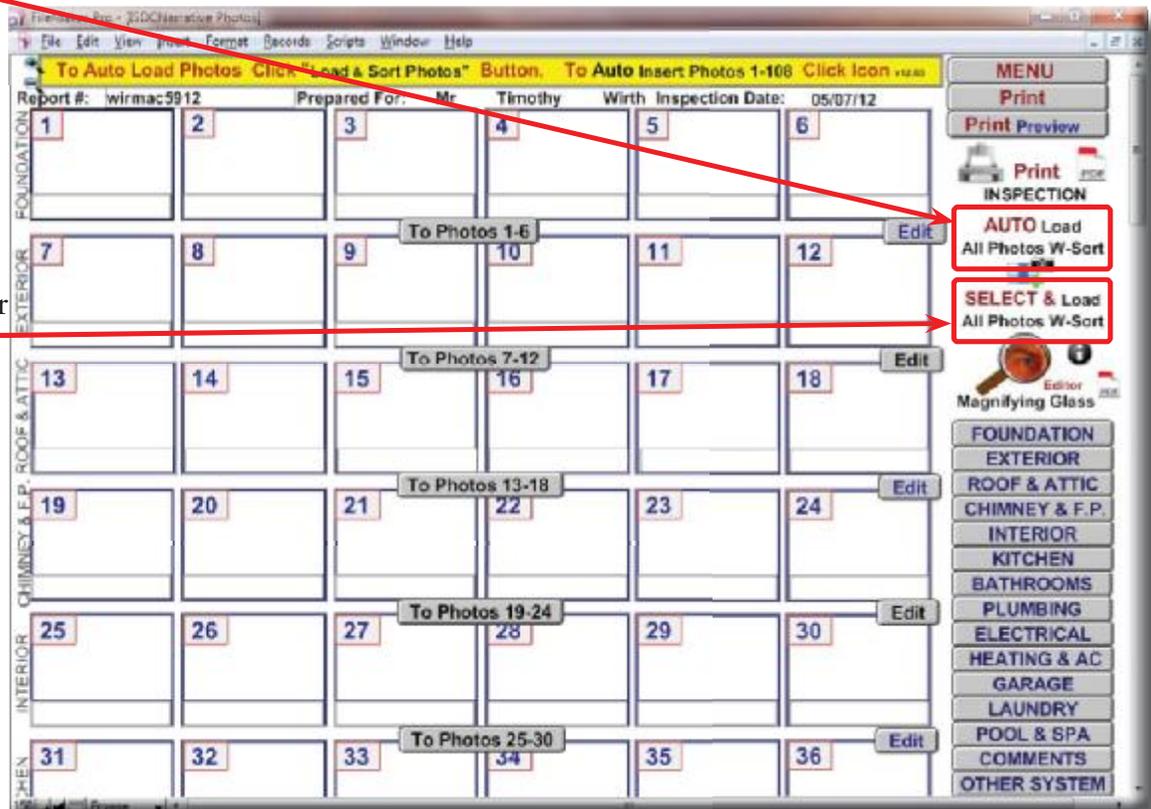
Set your camera to a low resolution for all pictures. To Upload photos to “Photos IdentifyReport Upload Only” folder just images no **Sub-Folders**. Click on the icon on the desktop this will open the Photo Folder just drag and drop. Now Identify Report has access to images.



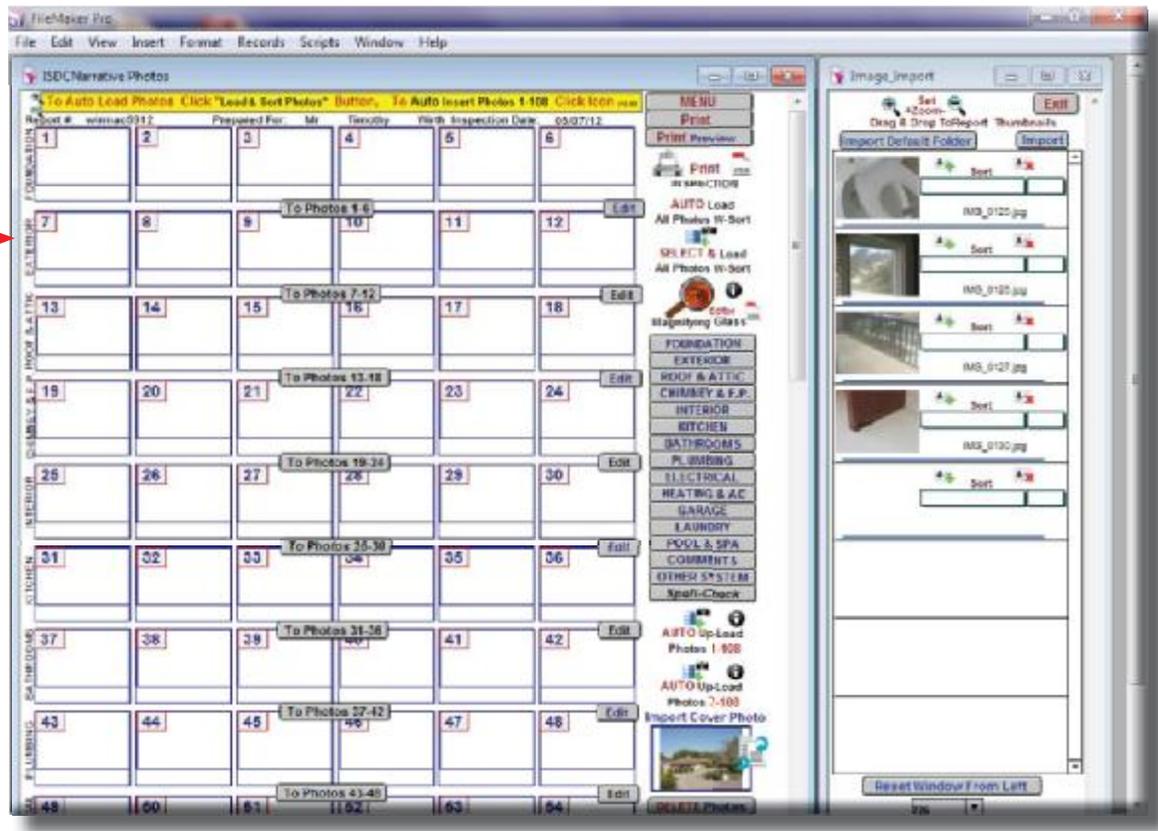
Click Photo Library icon

Click the  
“Auto Load” icon

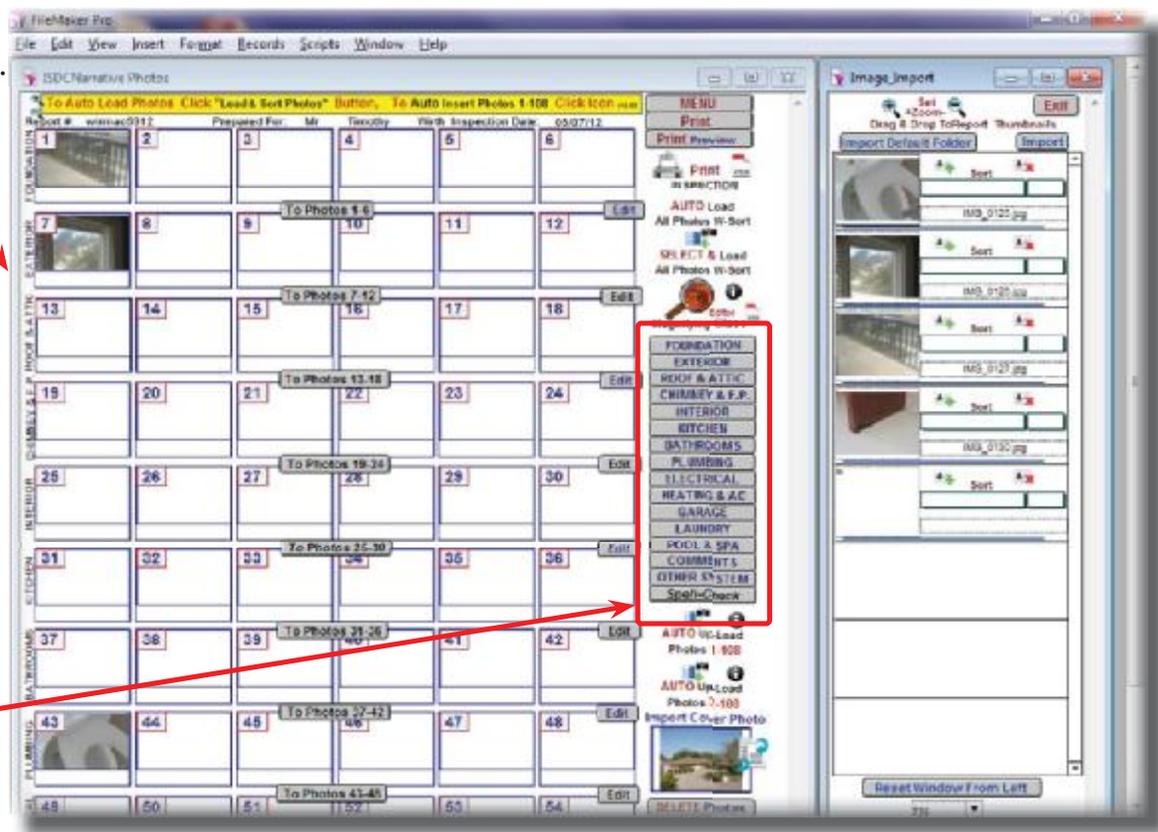
Click to look up your  
photo folder.



The "Image\_Import" Window will open to the right of the "Narrative Photos" Window.



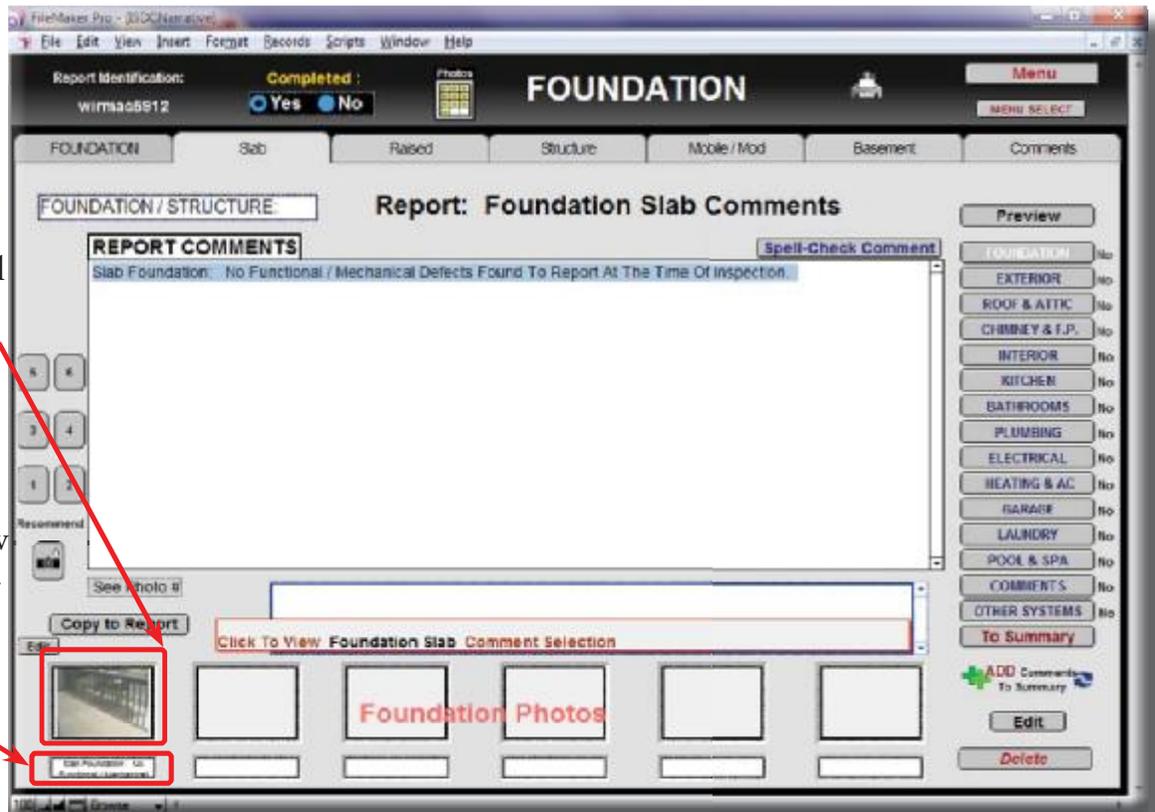
Drag and Drop Photos to where you want then.



After you have placed the images where you want then. Click on Category icon to return to Report.

The picture is now loaded to where you want it.  
Note: if you are using an iPad just tap image box and take picture with iPad the image will be inserted directly into you report.

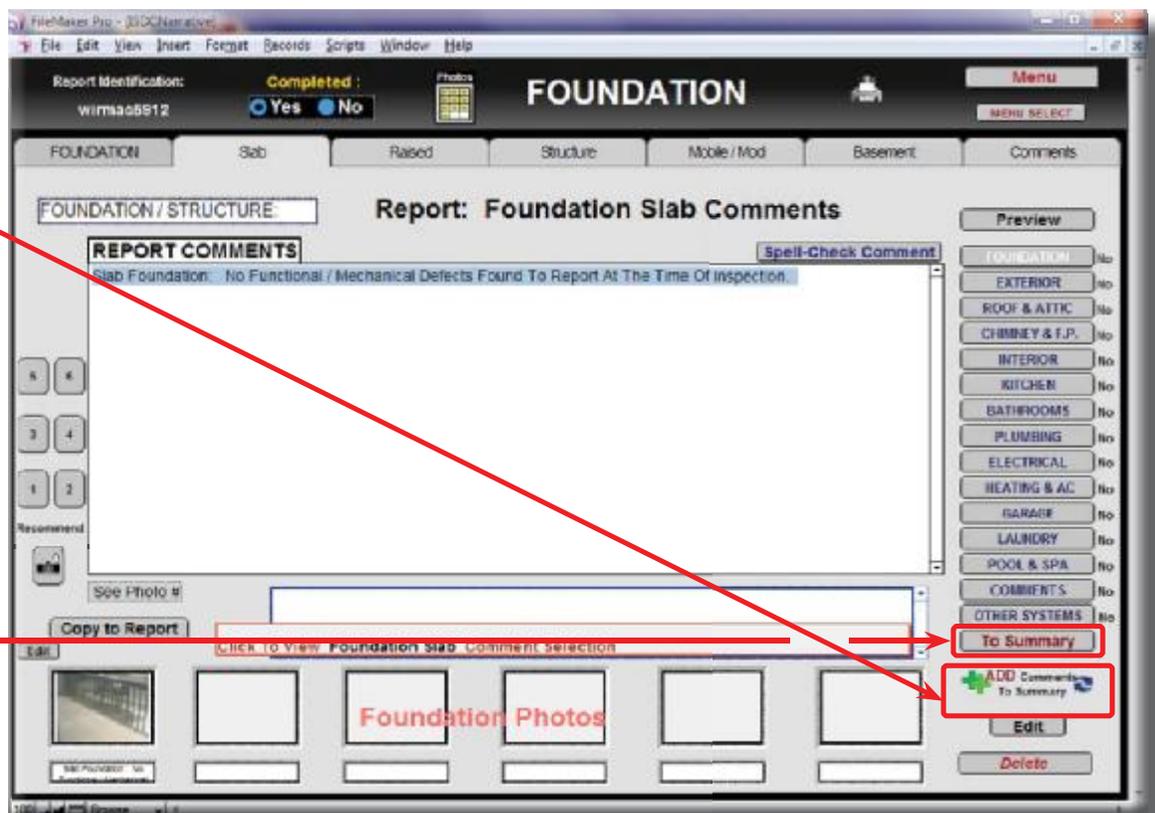
You can copy from the "Report Comments" into Comment Window for Image by Highlighting Copy Past or Drag and Drop.



Click icon "Add Comments to Summary"

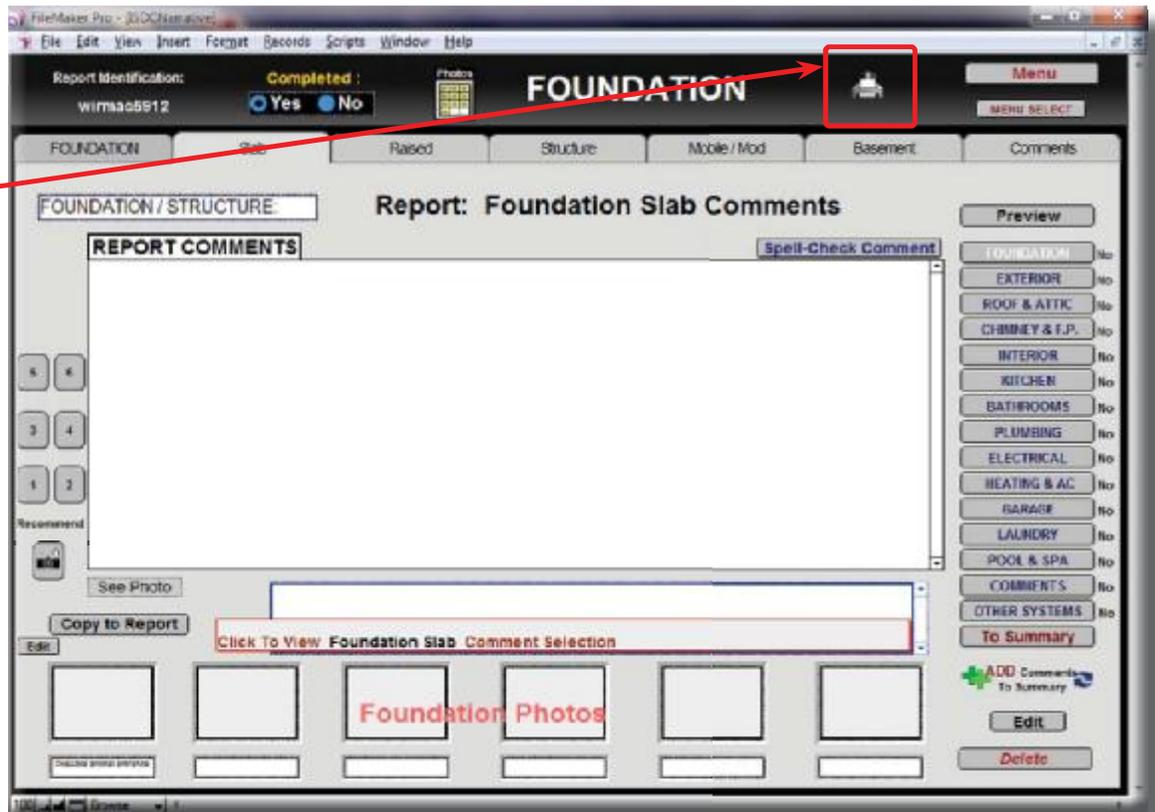
THEN

Click on the "Summary" icon to review your Summary Page.



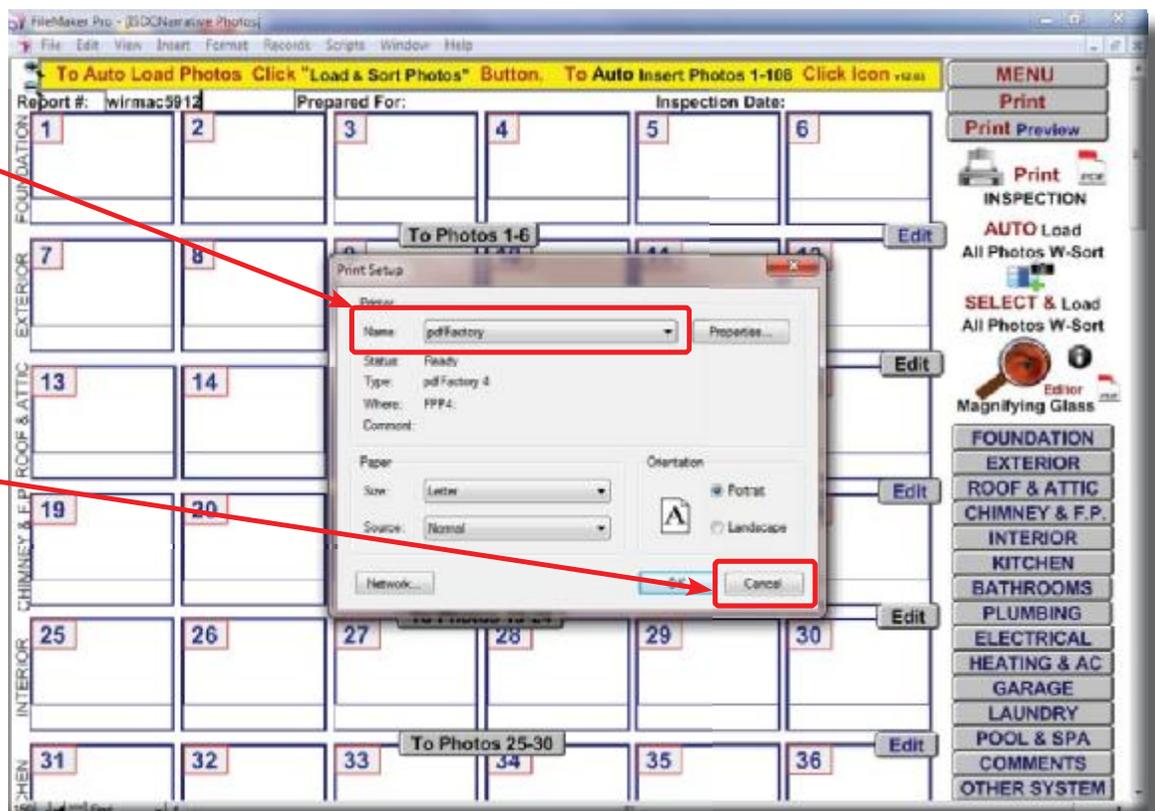


To generate a Inspection Report click printer icon.

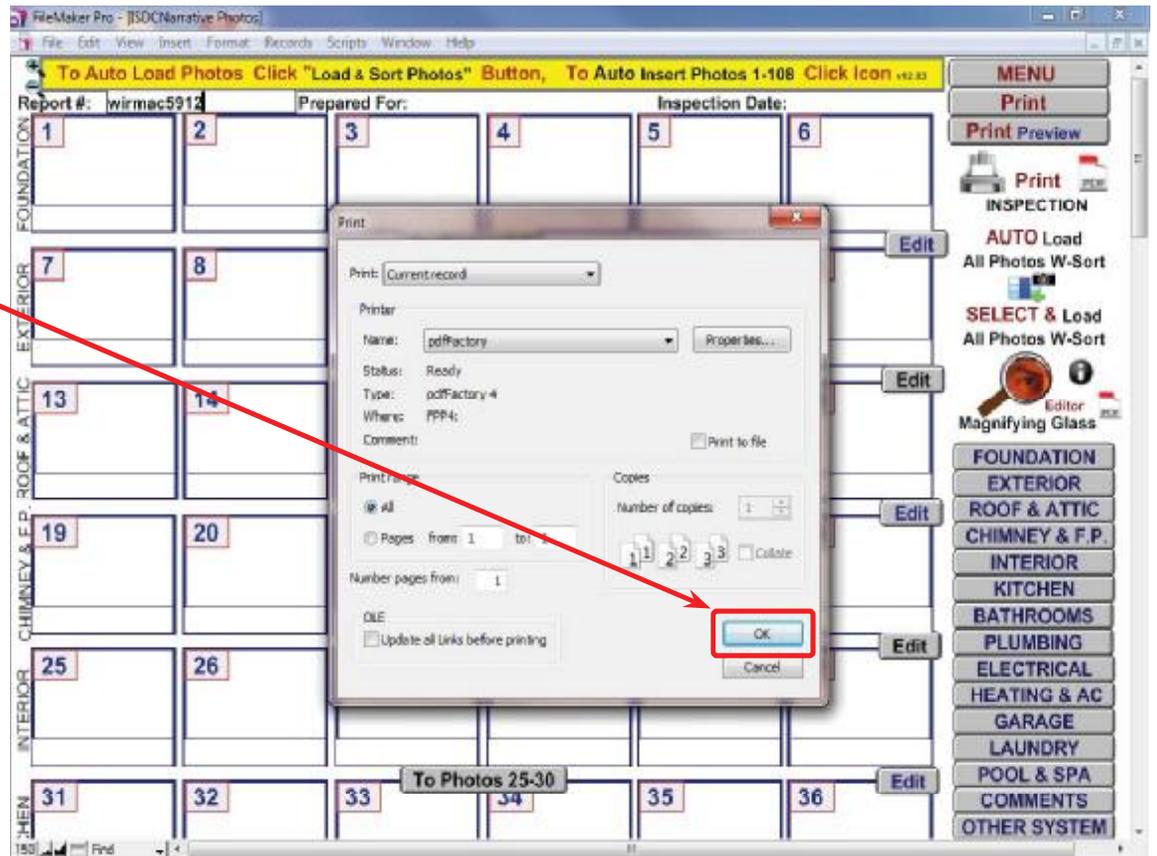


NOTE:  
Always use pdf Factory as you default printer.

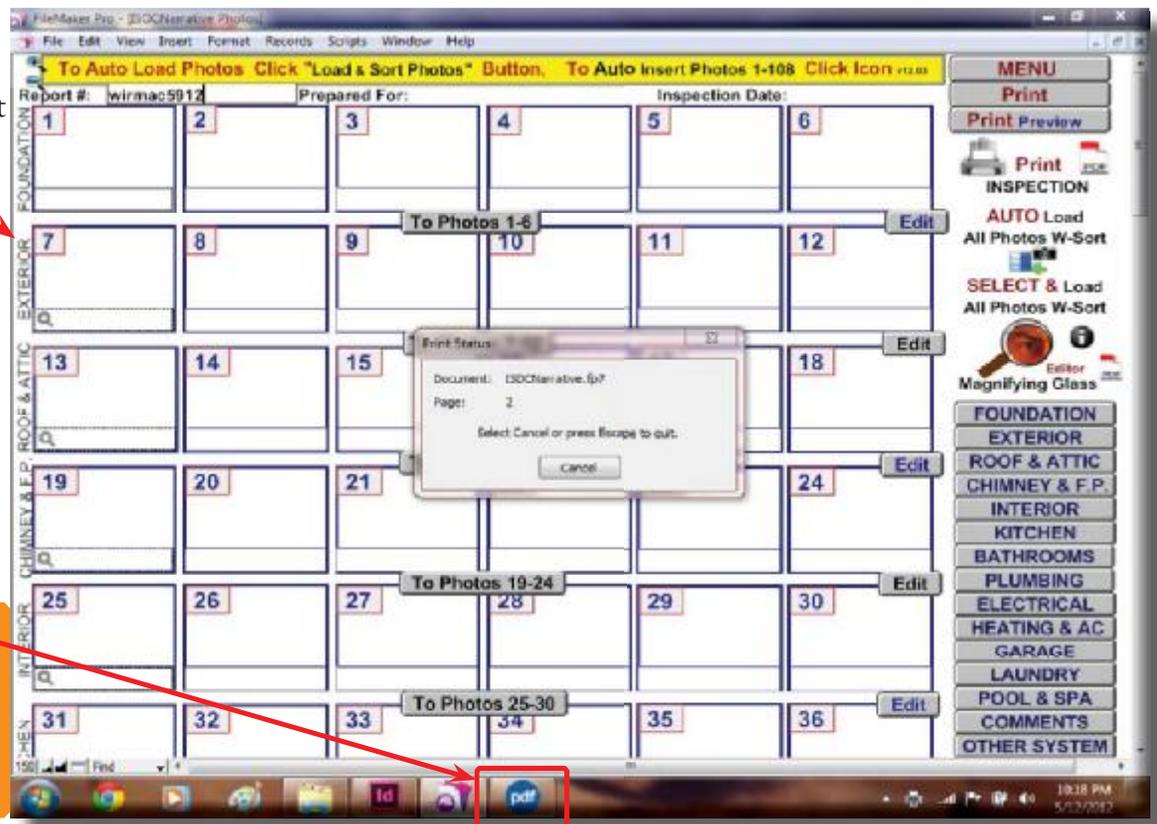
Click "OK"



Click "OK" Again



As the Inspection Report is being generated this screen appears don't need to do anything.

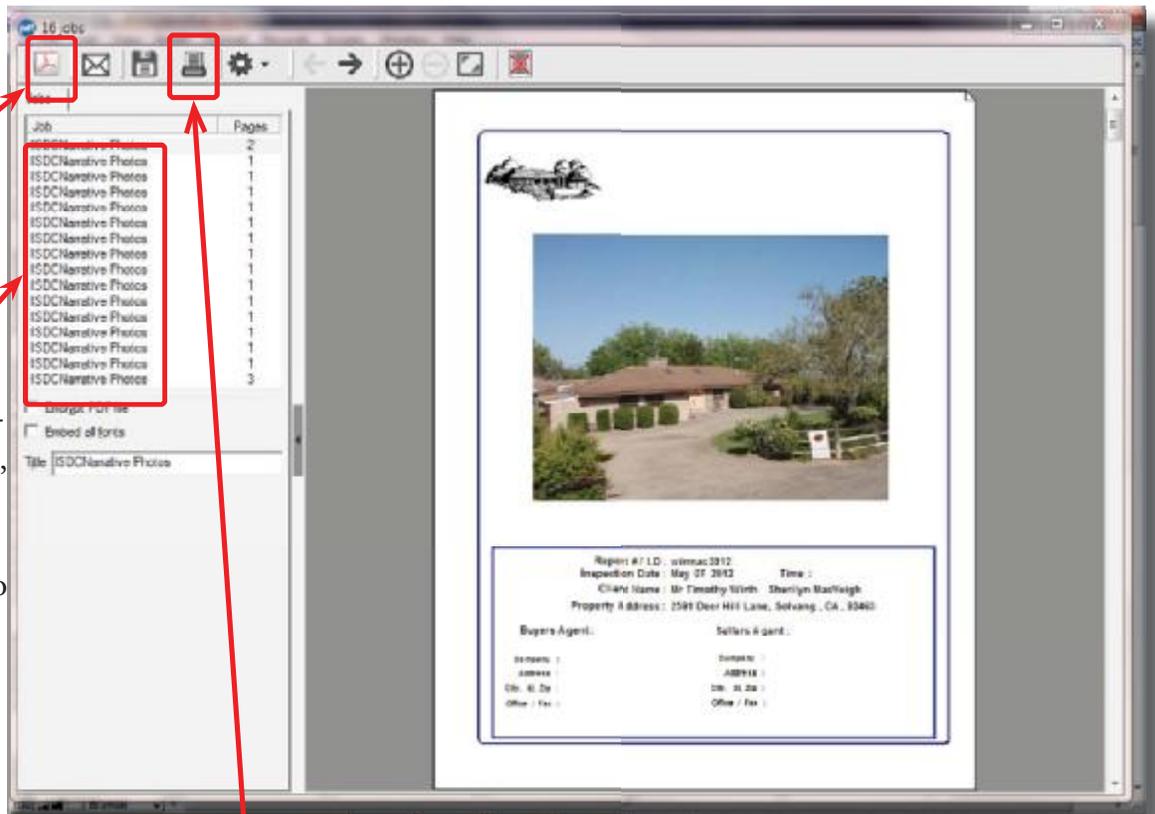


**Important:**

If the pdf factory screen does not come up click PDF icon.

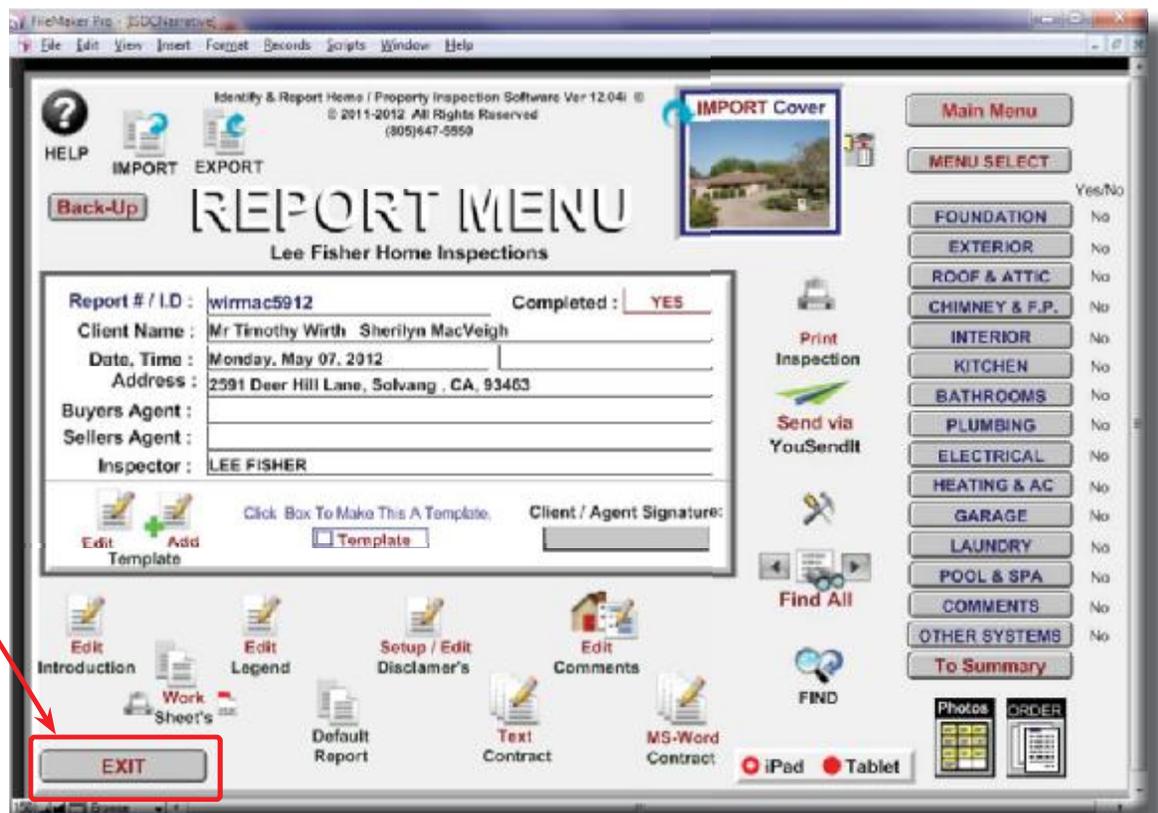
You should click on the PDF icon. To make a PDF.

After the Inspection Report has been generated, You can go through the report for a final check. Select the page to view before printing or saving.



To print the Inspection Report click on the printer icon.

When Exiting Identify & Report Professional click the "Exit" icon to close Program.



***Very important:***

You must Exit Identify & Report Professional before you copy any files to or from the iPad.