Inspections

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The instructions in this article relate to the ***Inspections*** screen. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

The Inspections screen has been designed from the ground up to record details of any inspections for the building, e.g. Workplace Health & Safety or Pest Inspections.

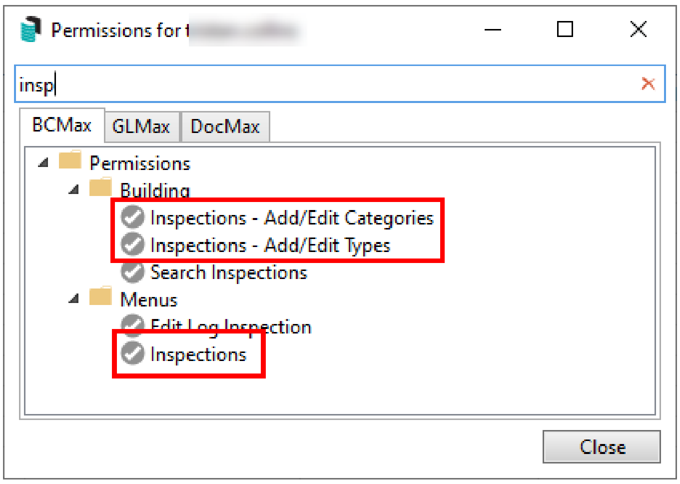
From this screen, you can view, create, edit, and delete the following:

- Inspections
- Inspection Types
- Inspection Type Categories
- Inspection Report

Inspections Security Permissions

The Inspections screen and a couple of its features are managed by permissions in ***Security Setup***.

- 'Inspections' controls access to the menu icon and screen.
- 'Inspection - Add/Edit Categories' controls if the user can manage Categories.
- 'Inspections - Add/Edit Types' controls if the user can manage Inspection Types.



Inspection Types

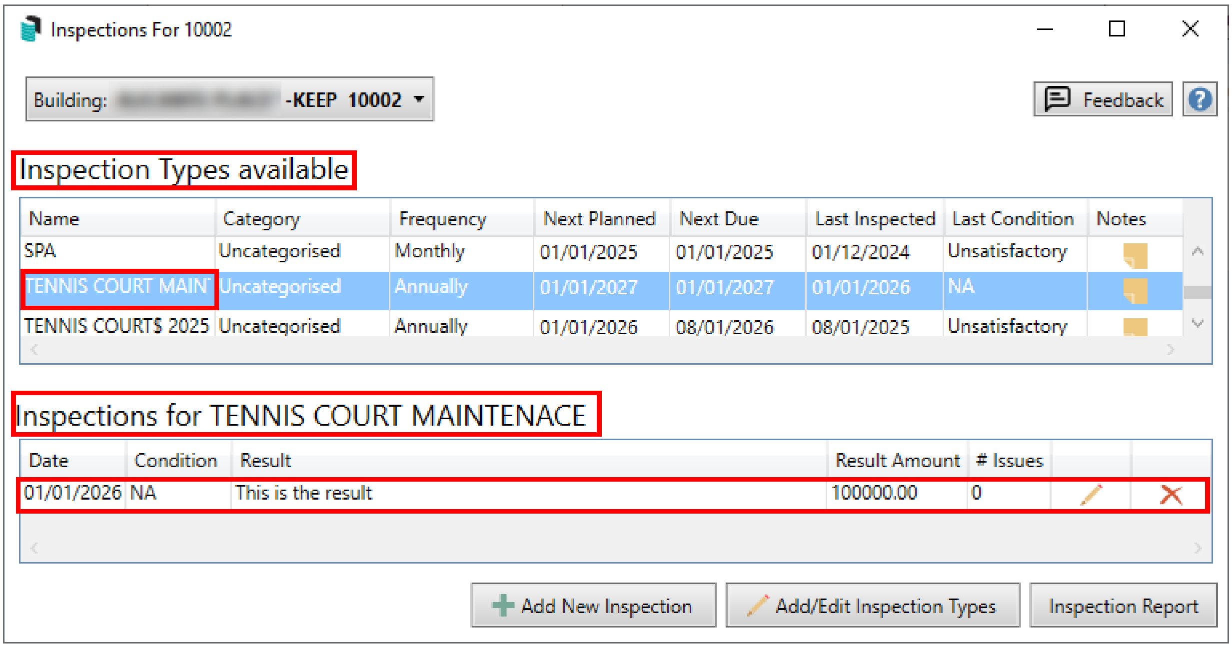
Inspections are viewed and managed by Inspection Type, to ease the management of inspections and reporting. The various Inspection Types will be listed in the table, in the top half of the ***Inspections*** screen, and as each Inspection Type is selected, the Inspections for that type will be displayed in the bottom half of the screen.

The 'Inspection Types available' table lists the various Inspection Types that are available in the current selected building only. The building can be changed using the building selector in the top left.

The Name, Category, Frequency, and Next Planned (date) are all entered when creating or editing the Inspection Type. The Next Due (date) is a calculation based on Last Inspected (date) and the Frequency, and cannot be manually edited.

The Last Condition is observed from the most recent inspection for this Inspection Type.

An icon in the Notes column indicates that notes are entered for this Inspection Type, but not the inspections themselves. Click the icon to add, edit, or delete notes for the Inspection Type.



Creating A New Inspection Type

This section explains how to create a new Inspection Type. This should only be done if an Inspection Type is not already available to import from another building.

1. Search or select ***Inspections***.
2. Click the *Add/Edit Inspection Types* button, and the Add/Edit Building Inspection Type window will open.
3. Click the *Add Type* button, and the New Inspection Type window will open.

4. Fill in the fields:
    - Type Name (mandatory): This will be for example 'Asbestos' or 'Pest Control'.
    - Frequency: Select from the drop-down menu.
    - Abbreviation Code (mandatory): This is a number that must start with a '6'. This is used by StrataMax internal database to manage the various Inspection Types across the entire portfolio. This must be unique per building.
    - Category (mandatory): Select from the drop-down menu. These can be managed using the instructions further down in this article.
    - Default Inspection: This is used for various reports throughout StrataMax and is not mandatory.
    - Next Planned: Choose from the drop-down calendar.
5. Click the *Add/Edit Notes* button to add, edit, or delete any notes associated to this Inspection Type.
6. Click the *Accept* button, and the Add/Edit Building Inspection Type window will close

Importing Inspection Type

If an Inspection Type has previously not been used in a building, Inspection Types from other buildings can be imported. As Inspection Types may vary between buildings, the new Category field is available in ***Search Inspections***, which can be used to limit results for reporting & Dashboard purposes. Follow the below steps to import an inspection type:

1. Search or select ***Inspections.***
2. Select Add/Edit Inspection Types.
3. Click the *Import Type* button to open the 'Import Inspection Types' window.
4. The search bar can be used to locate a particular Inspection Type if needed.
5. Tag the required Inspection Types to import, and use the *Code Override* field to type in a different code (starting with a '6') if the *Abbreviation Code* already exists in the current building, or if you are importing multiple Inspection Types with the same *Abbreviation Code.*
6. Click the *Import & Close* button.

Editing an Inspection Type

This section explains how to edit an inspection record in the local building.

1. Search or select ***Inspections.***
2. Click the *Add/Edit Inspection Types* button, and the Add/Edit Building Inspection Type window will open.
3. Click the *Edit Inspection Type* button, located on the far right, and looks like a pencil.

4. Amend any of the fields as required:
    - Type Name (mandatory): This will be for example 'Asbestos' or 'Pest Control'.
    - Frequency: Select from the drop-down menu.
    - Abbreviation Code (mandatory): This is a number that must start with a '6'. This is used by StrataMax internal database to manage the various Inspection Types across the entire portfolio. This must be unique per building.
    - Category (mandatory): Select from the drop-down menu. These can be managed using the instructions further down in this article.
    - Default Inspection: This is used for various reports throughout StrataMax and is not mandatory.
    - Next Planned: Choose from the drop-down calendar
5. Click the *Add/Edit Notes* button to add, edit, or delete any notes associated to this Inspection Type.
6. Click the *Accept* button, and the Add/Edit Building Inspection Type window will close.

Note: The Next Due (date) is a calculation based on Last Inspected (date) and the Frequency, and cannot be manually edited.

Deleting an Inspection Type

This section explains how to edit an inspection record in the local building. Bear in mind if an Inspection Type is in use, it cannot be deleted, however it can be merged into another Inspection Type. See the next section below for information on how to merge Inspection Types.

1. Search or select ***Inspections.***
2. Click the *Add/Edit Inspection Types* button, and the Add/Edit Building Inspection Type window will open.
3. Tag the Inspection Type to remove (it cannot be deleted if it is in use).
4. Click the *Delete* button.

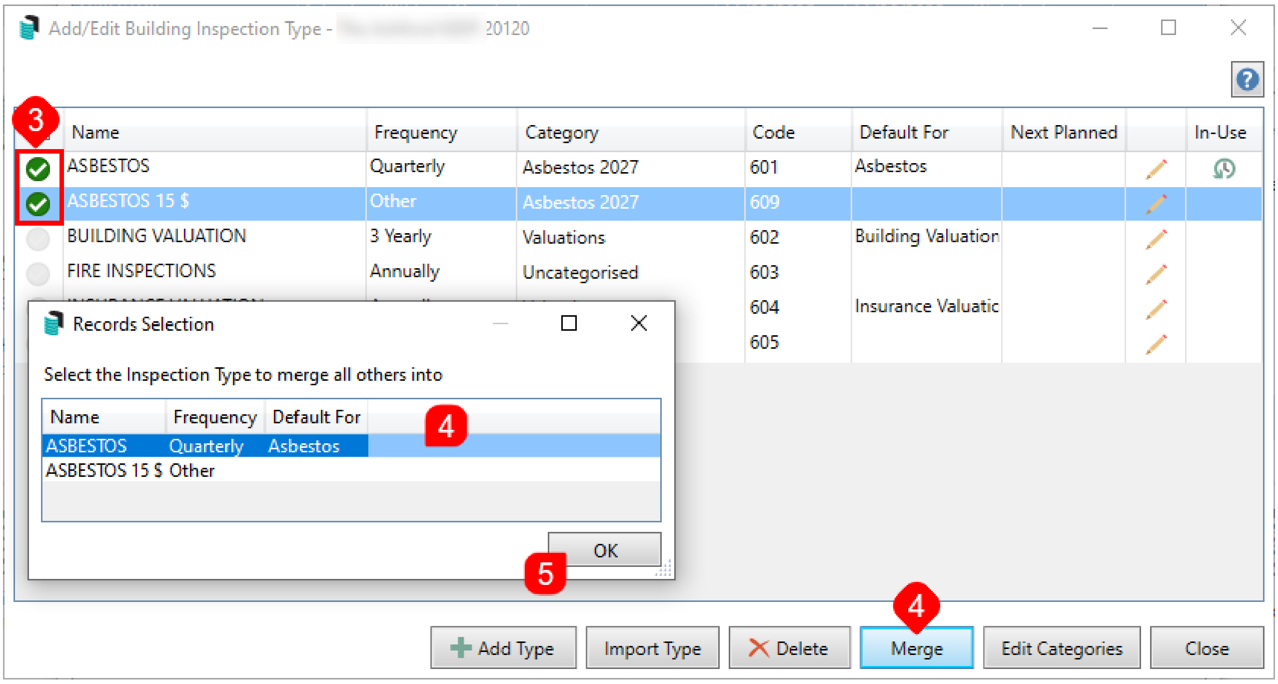
Merging Inspection Types

This section steps through the process of merging two or more Inspection Types. This can be used where an Inspection Type is in use and needs to be removed, for example.

When using the function, the Inspection Types that are removed will have their properties such as frequency, default inspection, etc. changed to use the ones of the Inspection Type that is kept. In addition, notes in the Inspection Types that will be removed will also be transferred to the Inspection Type that is kept.

> Use this function with caution as it cannot be undone.

1. Search or select ***Inspections.***
2. Click the *Add/Edit Inspection Types* button, and the Add/Edit Building Inspection Type window will open.
3. Tag each Inspection Type to merge.
4. Click the *Merge* button, and the Records Selection window will open to select the Inspection Type that all other Inspection Types will be merged into.
5. Click *OK* and a Merge Inspection Types warning will appear. Click *Yes* to proceed with the merge.



Inspection Type Categories

Inspection Categories assist with managing Inspection Types and reporting. These can be created, edited, merged, and deleted (when not in use). Categories are global and can be used in all buildings.

Add New Category

1. Search or select ***Inspections.***
2. Click the *Add/Edit Inspection Types* button, and the Add/Edit Building Inspection Type window will open.
3. Click the *Edit Categories* button and the View/Edit Global Inspection Categories window will open.
4. Click the Add button and type in the Category Name, then click *Save.*

Edit a Category

1. Search or select ***Inspections.***
2. Click the *Add/Edit Inspection Types* button, and the Add/Edit Building Inspection Type window will open.
3. Click the *Edit Categories* button and the View/Edit Global Inspection Categories window will open.
4. Click the *Edit Category* button (looks like a pencil) and make the required change in the *New/Edit Category* field, then click *Save.*

Delete a Category

Only Categories that are not in use can be deleted. Use the Merge function if Categories that are in use need to be removed.

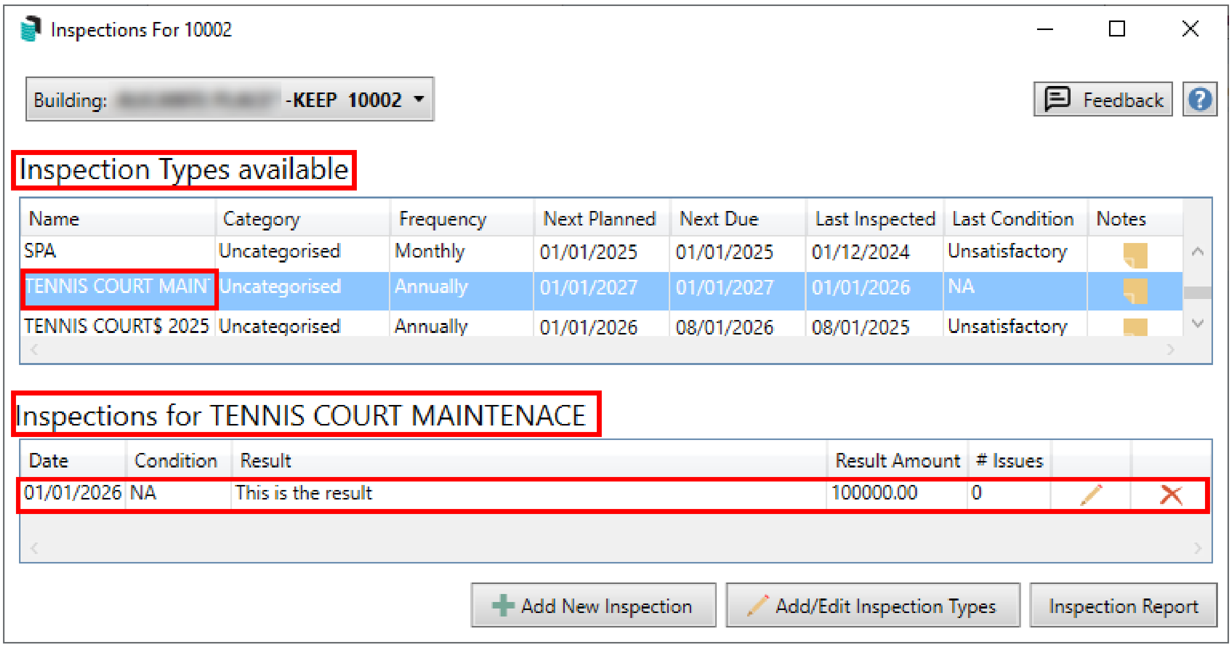
1. Search or select ***Inspections.***
2. Click the *Add/Edit Inspection Types* button, and the Add/Edit Building Inspection Type window will open.
3. Click the *Edit Categories* button and the View/Edit Global Inspection Categories window will open.
4. Tag the Category to remove (it cannot be deleted if it is in use).
5. Click the *Delete* button and click *Yes* when the warning appears.

Merge Categories

1. Search or select ***Inspections.***
2. Click the *Add/Edit Inspection Types* button, and the Add/Edit Building Inspection Type window will open.
3. Click the *Edit Categories* button and the View/Edit Global Inspection Categories window will open.
4. Tag each Category to merge.
5. Click the *Merge* button, and click *Yes* when the warning appears.
6. Type the name of the new Category in the *New/Edit Category* field, then click *Save.*

Managing Inspections

This section guides users through how to add new, edit and delete Inspections. Inspections are viewed and managed by *Inspection Type*, to ease the management of inspections and reporting. The various *Inspection Types* will be listed in the table, in the top half of the ***Inspections*** screen, and as each *Inspection Type* is selected, the *Inspections* for that type will be displayed in the bottom half of the screen.



Add New Inspection

1. Search or select ***Inspections.***
2. Select the required Inspection Type if it has previously been used in the building, and then click the *Add New Inspection* button. Refer to Import Inspection Type above if the Inspection Type has not previously been used.
3. Select the *Overall Condition* from the drop-down menu.
4. Select the *Inspection Date* from the drop-down menu.
5. Type in the *Inspection Results* (limited to 30 characters).
6. Type the *Results Amount.* This limited to 30 numerical characters and is formatted automatically.
7. Start typing the creditor / contractor name in the *Inspected By* field and the Account Code List window will appear for a creditor to be selected. Note in the top right, the *Master Chart* and *Add New Creditor (green plus)* buttons can be used if needed.
   - Only one creditor / contractor can be selected.
   - After the creditor / contractor has been selected, it can be edited or deleted from the inspection with the corresponding buttons in the top right.
8. Add an issue by clicking the *Add New Issue* button in the bottom right, and enter the details as required, including adding a document / image with the *Add Document* button. Click *Save* and *Close* when done.
9. Enter *Follow Up Notes* if necessary.
10. Enter *Comments* if necessary.
11. Enter *Internal Notes* if necessary.
12. Add Images and/or document using the *Add Document* button in the bottom right.
13. Inspection participants can be added by using the *Select From Roll, Select Contact, and Create Contact* buttons.
14. Once all field and section are populated as required, click the *Save & Close* button.

Edit an Inspection

1. Search or select ***Inspections.***
2. Select the required Inspection Type, and then click the *Edit Inspection (pencil)* button.
3. Amend the details, fields, and section as required, then click the *Save & Close* button.

Delete an Inspection

1. Search or select ***Inspections.***
2. Select the required Inspection Type, and then click the *Delete Inspection (red X)* button.
3. Read the Delete Inspection warning carefully and click the *Delete* button to proceed.

Inspection Report

This section explains how to produce the Inspection Report / Register, which uses the ***Report Distribution*** interface. The report produced in this screen is limited to the local building, and uses the template available, named 'Inspections Register'.

Other alternatives include the *Building Information Report*, which also includes some inspection information. A global report can also be produced with Inspection details and upcoming inspection dates for a single, multiple or all buildings using the ***Search Inspections*** screen.

1. Search or select ***Inspections.***
2. Click the *Inspection Report* button, and the Inspection Register window will open.
    - Please refer to the ***Report Distribution*** *article* for more detailed guidance on how to use this window, such as changing the *Distribution Method*, adding reports and attachments, etc.