

FH Onsite Inspections



Installation and Introduction Guide

**Fire Department
Management
Solutions from
Visionary Systems**

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Chapter I

Overview

This guide contains everything you need to know to install, configure, and use Onsite Inspections.

We urge that Onsite Inspections users read this chapter.

This guide assumes that you know the basics of using the Windows CE operating system on your Pocket PC. Refer to the Pocket PC online help and documentation for more information.

About This Manual

Important Terms

Throughout this guide, certain terms are used:

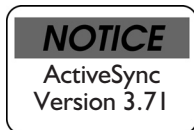
- 'Onsite Inspections' is a Pocket PC application that lists occupancy and inspection records exported from FH.
- 'Pocket PC' is the mobile computer where Onsite Inspections is installed.
- 'Dock Computer' is a computer workstation with FH installed. Any FH workstation can be used as a dock computer as long as Microsoft ActiveSync 3.5 or better is installed on the workstation, Onsite Inspections is activated in FH, and the Onsite Inspections synchronization folder is accessible to all 'dock computers'.

See 'Configure Dock Computer' on page 19 for information on activating Onsite Inspections in FH and specifying a synchronization folder.

System Requirements

Onsite Inspections requires the following:

- Pocket PC with:
 - Windows® CE for Pocket PC devices version 3.0 or greater.
 - 32 MB available memory.
- Dock computer with:
 - Microsoft ActiveSync® 3.5 or greater.



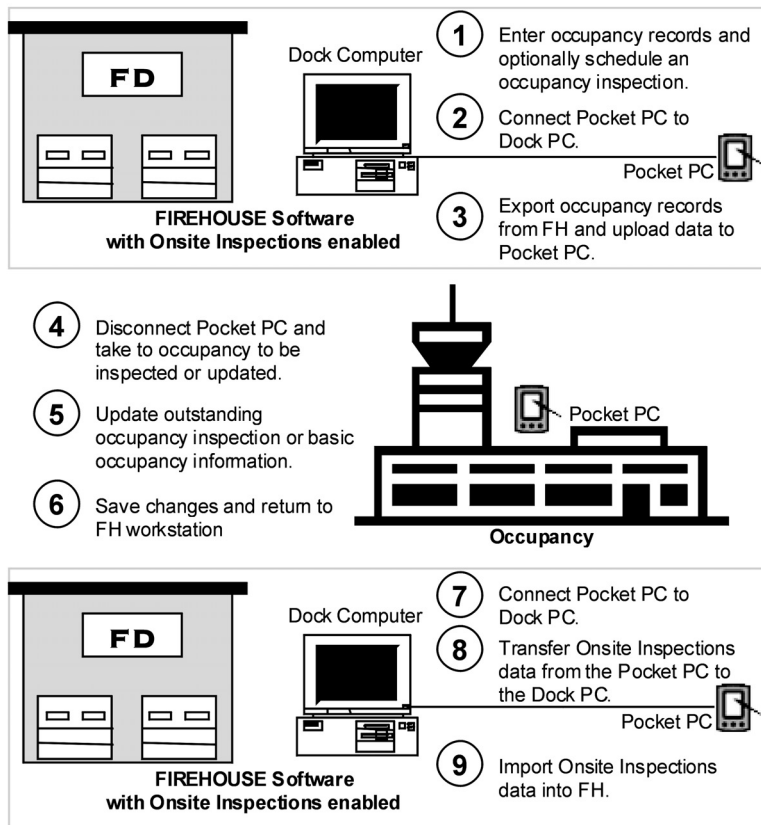
Clients using FH Onsite Inspections and Microsoft ActiveSync version 3.7.1 have reported problems synchronizing FH Onsite Inspection records with your desktop. If you have problems synchronizing FH Onsite Inspection records with your desktop and are using Microsoft ActiveSync version 3.7.1, we recommend uninstalling and reinstalling Microsoft ActiveSync version 3.7.

- FH version 5.4 or greater (you must have FH version 5.5.6 or greater to use FH Onsite Inspections on a Pocket PC 2003 or .CE Net Device), with Onsite Inspections configured.

See 'Configure Onsite Inspections on Dock Computer' on page 19 for more information.

How FH Onsite Inspections Works

Occupancy records are exported from FH then uploaded from the dock computer to the Pocket PC, modified on the Pocket PC, then downloaded back into the dock computer and imported into FH. When occupancy records are imported back into FH, existing FH occupancy records are overwritten. The graphic below illustrates the process of completing inspections and updating occupancy information using Onsite Inspections.



① is detailed in the User Guide Tutorial section.

③ is detailed on page 16.

⑤ is detailed on page 19.

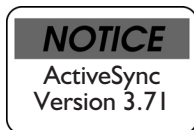
⑧ and ⑨ are detailed on page 31.

Note: Transfer updated occupancy information from the Pocket PC to the Dock PC as soon as possible to prevent out of date information from being imported into FH.

Chapter 2

Installation and Setup

If you receive the Onsite Inspections activation and an FH 5 update at the same time, be sure to apply the update first. The dock computer must have FH 5 version 5.5.6 or greater. Microsoft ActiveSync version 3.5 or greater must also be installed on the dock computer and Pocket PC.



Clients using FH Onsite Inspections and Microsoft ActiveSync version 3.7.1 have reported problems synchronizing FH Onsite Inspection records with your desktop. If you have problems synchronizing FH Onsite Inspection records with your desktop and are using Microsoft ActiveSync version 3.7.1, we recommend uninstalling and reinstalling Microsoft ActiveSync version 3.7.

Disable any synchronization software other than Microsoft ActiveSync whenever the Pocket PC is connected to the dock computer. Other synchronization software (for example, HotSync for Palm) could disrupt communication between the Pocket PC and the dock computer.

Installing FH Onsite Inspections

Installing FH Onsite Inspections requires an FH Onsite Inspections activation diskette and the FH or FH Enterprise installation CD.

Activating FH Onsite Inspections on Dock Computer

FH Onsite Inspections must be activated on the dock computer.

To Activate FH Onsite Inspections

- ⊕ Insert the FH System Activation diskette that includes the Onsite Inspections license.
- ⊕ Access the **Administration** menu **Activate or Update Features** option then select *Install System Activation Diskette*.
- ⊕ Press **OK**. The FH Onsite Inspections module is activated and ready to be installed.

Onsite Inspections components must still be installed.

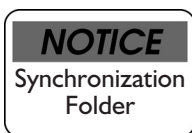
Installing FH Onsite Inspections

The Onsite Inspections installation adds components used by the dock computer and installs Onsite Inspections to a Pocket PC docked to the dock computer. The steps to install FH Onsite Inspections vary slightly depending on the operating system.

To Install FH Onsite Inspections

- ⊕ Determine Windows version of dock computer:
- ⊕ If the dock computer runs Windows 2000, NT, or XP:
 - ⊕ Log into dock computer as an administrator.
 - ⊕ From the Windows **Start** menu, select the **Settings** option **Control Panel** option.

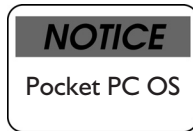
- ⊕ Double click **Add/Remove Programs**. The **Add/Remove Programs** form is displayed.
- ⊕ Press **Add New Programs** then press **CD or Floppy**.
- ⊕ Insert the FIREHOUSE Software or FH Enterprise CD.
- ⊕ Press **Next>** then **Browse** to display the **Browse** dialog. Change the *Files of Type* to "Programs", select **AUTORUN.EXE**, then press **Open**.
- ⊕ Press **Finish**. The FIREHOUSE Software Installation menu is displayed.
- ⊕ If the dock computer runs Windows 95, 98, or Me:
 - ⊕ Insert the FIREHOUSE Software or FH Enterprise CD. The FIREHOUSE Software Installation menu is displayed.
 - ⊕ If autorun is enabled, the installation window is displayed.
 - ⊕ If autorun is disabled, select the **Start** button, **Run** option and type **n:\autorun** (where *n* is the CD ROM drive letter) then press **OK**. The installation window is displayed.
- ⊕ Select Pocket PC extension installation (steps vary for FH Enterprise and standard FH):
 - ⊕ If FH Enterprise, select **Install Pocket PC Extensions**. The **FIREHOUSE Software Pocket PC Extensions** form is displayed.
 - ⊕ For standard FH, select **Additional Installation Options**, then select **Install Pocket PC Extensions**. The **FIREHOUSE Software Pocket PC Extensions** form is displayed.
- ⊕ The default workstation FIREHOUSE Software installation root directory is displayed.
 - ⊕ Optionally search for additional FH installations by pressing **Search Entire System**. Highlight the FH installation you wish to configure for use with FH Onsite Inspections.
- ⊕ Press **Next>**. The selected FH installation path is displayed. Generally the default location is acceptable. The *Occupancy & Inspection Management* Pocket PC extension is already selected.
- ⊕ Press **Next>**. The directory for synchronization files is displayed. Generally the default location for synchronisation files is acceptable.



Records sent between the dock computer and the Pocket PC are stored in a synchronization folder accessible to FH on the dock computer. The default location is in the FH root directory in a folder named **PDA**. The default location for the FH root directory is **C:\Program Files\FIREHOUSE Software**, yours may be different. If the Pocket PC will be connected to more than one dock computer, the synchronization folder should be accessible to each workstation where the Pocket PC will be connected (for example, a network folder). All Onsite Inspections users must have sufficient computer/network rights to access this

folder. Press **Browse** to select a PDA folder that is different than the default location.

- ⊕ Select the appropriate Pocket PC operating system.



If you are not sure of your Pocket PC operating system, access your Pocket PC 'Start' menu, select the *Settings* option, select the *System* tab, then the **About** option. If you have Microsoft(R) Pocket PC Version 4 or greater, you should select *Windows for Pocket PC 2003 or CE.Net v 2.0.34*.

- ⊕ Press **Next>**. The **Installation Complete** form is displayed with *Install Software on Handheld Device* selected.

Onsite Inspections is ready to be used at this dock computer. Repeat the steps above for each dock computer that will export records to Onsite Inspections on a Pocket PC. Onsite Inspections still must be installed on your Pocket PC. If you are *not* installing Onsite Inspections on a Pocket PC, uncheck *Install Software on Handheld Device* and press **Finish**.

- ⊕ Press **Finish>**. The **License** form is displayed:
 - ⊕ Select *View SYWARE, Inc. End-User License Agreement* then press **Next>** to view the license agreement. Close the license agreement when finished.
 - ⊕ Select *I Agree*, then press **Next>** to accept the agreement and proceed.
- ⊕ Connect your Pocket PC to your dock computer. If you need more information about connecting your Pocket PC to a dock computer, refer to the documentation included with your Pocket PC.



Microsoft ActiveSync® must be installed and running on the dock computer and Pocket PC.

- ⊕ Press **Next>**. The **Installing Applications** prompt is displayed. If the **Applications Already Installed** prompt is displayed, press **Yes** to display the **Installing Applications** prompt.
- ⊕ Press **Yes**. The **Installing Applications** progress bar is displayed on the dock computer as Onsite Inspections installation files are transferred to the Pocket PC, then the **Application Downloading Complete** prompt is displayed. Installation on the Pocket PC launches automatically. Note that you must let the installation to the Pocket PC complete before doing anything else on the dock computer.
- ⊕ On the Pocket PC, if the **Already Installed** prompt is displayed, tap **OK**. FH records on the Pocket PC are not overwritten.

- ⊕ If the **File in Use** prompt is displayed, tap **No**. If the installation will not proceed, you may need to close Onsite Inspections on the Pocket PC. See 'Close Running Programs' on page for the steps to close running programs on a Pocket PC.
- ⊕ If the **Confirm File Replace** prompt is displayed:
 - ⊕ Select **Yes** to replace with installation files. Use caution when replacing existing files since this may cause issues with other programs installed on the Pocket PC.
 - ⊕ Select **No** to keep existing files. Installation on the Pocket PC completes.
- ⊕ On the dock computer, press **OK** to the **Application Downloading Complete** prompt. The **Installation Complete** form is displayed.
- ⊕ Press **Finish>**.

You must transfer FH occupancy records from the dock computer to the Pocket PC before using Onsite Inspections.

Instructions for uploading Onsite Inspections to the Pocket PC start on page 16.

Setting Up FH Onsite Inspections

Before you can start using FH Onsite Inspections, you need to specify the workstation options that control FH Onsite Inspections behavior, set security. We also recommend that you set up an inspection checklist to use in FH Onsite Inspections.

Specifying Workstation Options

You need to specify dock computer workstation options.

To Specify Workstation Options

- ⊕ Launch FH.
- ⊕ From the **Tools** menu, select **Workstation Options**. The **Workstation Options** form is displayed.
- ⊕ Access the Pocket PC section.
- ⊕ If you need to change the location created by the installation, press **Directory** and select a new location.

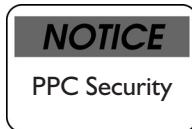


The synchronization folder needs to be accessible to all Onsite Inspections users.

- ⊕ Check *Leave temporary import files from the Pocket PC in the recycle bin after import* to leave files downloaded from the Pocket PC to the **Import** subdirectory of the synchronization folder in the Windows Recycle Bin after they are imported into FH. When not checked, the files are permanently deleted after successful import. Note that if the Windows Recycle Bin deletes files automatically, files are permanently deleted regardless of this option.
- ⊕ Check *Do not check for Pocket PC import files when logging in* if you do not want FH to prompt users to run the Onsite Inspections import when files are found in the **Import** subdirectory of the synchronization folder at FH start up. Only users with security access are prompted to import files.
- ⊕ Press **OK**.

Setting Up User Security

There are Onsite Inspections specific security rights in FH. An FH administrator needs to ensure that each user has adequate rights to perform Onsite Inspections tasks in FH.



FH Onsite Inspections on the Pocket PC has no security provisions. Anyone using the Pocket PC can open Onsite Inspections and browse downloaded FH information. Refer to your Pocket PC device's documentation for information on Pocket PC security.

To Specify Security

- ⊕ From the **Administration** menu, select the **Users and Security** option. The **Users and Security** form is displayed.
- ⊕ Select the user that needs access, press **Properties** then click the *Modules* tab.
- ⊕ Set appropriate rights for Onsite Inspections areas:
 - ⊕ Under **Occupancy & Inspection Management**, locate *Synchronize Inspections on Handheld Device* and check *Allow* to enable the user to export to the Pocket PC and import from the Pocket PC.
 - ⊕ Under **Occupancy & Inspection Management**, locate *Update Inspection Checklists* and check *Allow* to enable the user to add new inspection checklists and edit existing checklists.
 - ⊕ Under **Department Journal and Events**, locate *Transfer files to/from Pocket PC*, and check *Allow* to enable the user to perform the options from the Tools menu Pocket PC Tools option.
- ⊕ Press **Save**.

Repeat steps above for each user that will be performing Onsite Inspections tasks in FH.

Setting Up Inspection Checklist

Onsite Inspections includes an inspection checklist that lists items to inspect. Inspectors tap whether a specific item passes, fails, or is not applicable. Inspection checklists used in the Pocket PC are set up and modified in FH on the dock computer. The checklist (or checklists) can not be modified from the Pocket PC.

We recommend at least one default inspection checklist. Optionally, you can add additional inspection checklists that are associated with specific

inspection types. This allows you to tailor the inspection checklist based on the inspection type. If you do not have a default inspection checklist, only occupancy information and/or previous violations will be exported if a reinspection was scheduled for the exported record.

To Add a Default Inspection Checklist

- ⊕ Access the **File** menu, **Inspection** option **Inspection Checklists** option. The **Inspection Checklists** form is displayed. You must have 'allow' security rights for Update Inspection Checklists to edit or add inspection checklists.
- ⊕ You can edit the default inspection checklist, or add a new checklist.
 - ⊕ To add a new checklist, press **New**. The **Checklist Items** form is displayed.
 - ⊕ To select an existing checklist, highlight the checklist and press **Properties**. The **Checklist Items** form is displayed.



If you already have set up an inspection checklist for Onsite Inspections, make sure this checklist is marked as the default checklist or has been assigned a specific inspection type. Verify that all checklist items are associated with a checklist item category. Only items associated with a checklist item category are exported to Onsite Inspections.

If the **Properties** or **New** buttons are disabled, you may not have adequate security to access this area. See 'To Set Up User Security' on previous page for details.


- ⊕ Check *Make this the default checklist*.

Press **F1** at your workstation for more details on setting up the inspection checklist.

- ⊕ Press **OK**. The **Inspection Checklists** form is displayed.

The default checklist is used for records exported to a Pocket PC unless an additional inspection checklist is associated with a specific inspection type. If you need to add additional inspection checklists that are associated with specific inspection types, complete the steps below.

To Associate an Additional Inspection Checklist with Specific Inspection Type(s)

- ⊕ Access the **File** menu, **Inspection** option **Inspection Checklists** option. The **Inspection Checklists** form is displayed. You must have 'allow' security rights for Update Inspection Checklists to edit or add inspection checklists.
- ⊕ Add new inspection checklist or select an existing inspection checklist:
 - ⊕ To add a new checklist, press **New**. The **Checklist Items** form is displayed.
 - ⊕ To select an existing checklist, highlight the checklist and press **Properties**. The **Checklist Items** form is displayed.
- ⊕ Press the  button next to *Link to Inspection Types*. The **Lookup - Inspection/Activity Types (MultiSelect)** form is displayed.

- ⊕ Select inspection type or types:
 - ⊕ One inspection type: Click on a list item to highlight.
 - ⊕ Inspection types in a range: Click on the first list item in the range, press **Shift**, then click the last list item in the range to highlight all list item between the first and last records in range. Release the **Shift** key.
 - ⊕ Inspection type spread throughout the list: Click on a list item, press **Ctrl**, then click an additional list item, repeating until all list items are selected. Release the **Ctrl** key.
- ⊕ Press **OK** and all highlighted inspection types are added. The default checklist is used if the inspection type is not linked to a specific checklist.
Press **F1** at your workstation for more details on setting up the inspection checklist.
- ⊕ Press **OK**.

Add as many inspection checklists as needed. Press **Close** from the **Inspection Checklists** form if you are finished adding inspection checklists.

See page 27 for details on completing the inspection checklist on the Pocket PC.

Chapter 3

Move Records to Pocket PC

There are two steps involved in moving records from the dock computer to the Pocket PC:

- Export records, and
- upload records to Pocket PC.

Both steps are usually completed at the same time from the dock computer with the Pocket PC connected (as detailed in 'To Select Records for Export and Upload', below), but there are situations where the export and upload need to be performed separately. For example, if occupancy and inspection records are exported from an FH workstation that is not a dock computer, the records can not be uploaded directly from this computer. Exported files are placed in the synchronization folder, and can be manually uploaded from any dock computer to a Pocket PC. See 'To Select Records for Export Without Uploading to Pocket PC' on page 20 for the procedure.

Export and Upload Records

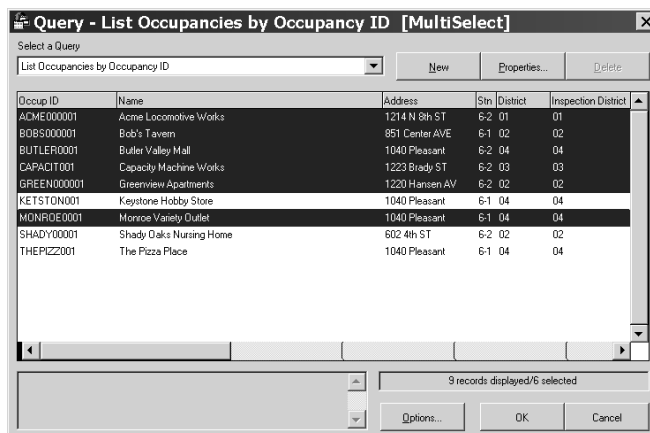
Any FH Occupancy record can be exported to your Pocket PC, and you can select a scheduled inspection for the occupancy if available.

Selecting Records to Export

You can export and upload to your Pocket PC in a single step, or export and upload separately. Generally you will select records to export to your Pocket PC and upload the records to the Pocket PC in a single step.

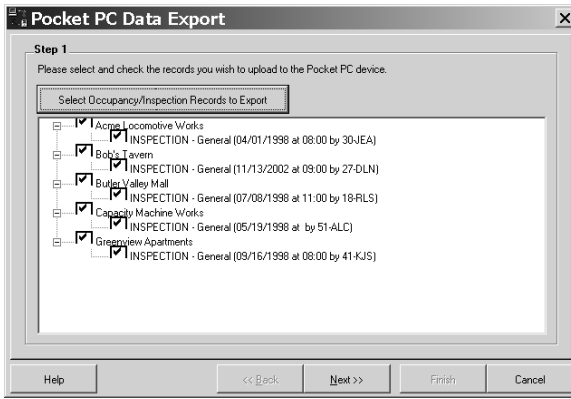
To Select From All Records for Export and Upload

- ⊕ From the **File** menu, select **Inspections > Export Inspection Records to Pocket PC**. The **Pocket PC Data Export** form is displayed.
- ⊕ Press **Select Occupancy/Inspection Records to Export**. The default occupancy query of available occupancies is displayed. You can select any occupancy query.



All highlighted records will be available for export. To select multiple records, press and hold the **Ctrl** key and click on each record to make available for export. Press **F1** in FH and then Click for related topics and choose **Select Multiple Records** for more information on selecting multiple records in a list.

- ⊕ Highlight occupancies that you wish to inspect, then press **OK**.



The **Pocket PC Data Export** form is displayed with the occupancies you selected. Each occupancy record selected above is listed, with scheduled inspections listed below the occupancy name (if available). Each item with a check mark is included in the export when **Next>** is pressed. Only 1 inspection per occupancy can be selected.

- ⊕ Select the occupancy and/or scheduled inspection items to include in the export:
 - ⊕ To exclude an occupancy record and inspection, uncheck the occupancy record listing.
 - ⊕ To export an inspection record, check the inspection record listing. Only one inspection record per occupancy can be exported.
 - ⊕ To export an occupancy record and blank inspection record, select the occupancy record listing (with no inspection items checked or listed for that occupancy).
- ⊕ Press **Next>**. The **Pocket PC Data Export** form Step 2 section is displayed.
- ⊕ Select the staff members that perform inspections:



Onsite Inspections includes an Inspector field that lists available staff. If you have a large number of staff records, we recommend including only staff members that perform inspections. Including a large number of staff records can potentially impact Onsite Inspections performance.

- ⊕ To limit available inspectors, press **Select Staff Members**, highlight staff members to include (multi-select is enabled), press **OK** then **Next>>** and the Step 3 section is displayed.
- ⊕ To include all staff members as available inspectors, press **Next>>** and the Step 3 section is displayed.
- ⊕ Check *Transfer files after export* if you are at a dock computer and your Pocket PC is connected. This will upload the export files to the Pocket PC (described below).



When transferring files to the Pocket PC, Onsite Inspections should be closed on the Pocket PC.

- ⊕ Press **Finish**. Selected inspections are created in Pocket PC format and placed in the **Export** subdirectory of the synchronization folder.

- ⊕ Press **Close**.

We recommend that you review available occupancies and inspections on your Pocket PC before disconnecting your Pocket PC from the dock computer to verify that *all* desired occupancies are available. If any occupancies were inadvertently excluded, repeat the export to Pocket PC procedure, selecting all desired occupancies and inspections. Occupancy and inspection records exported to the Pocket PC replace existing records on the Pocket PC.

To Export Incomplete Inspections For The Day

- ⊕ From the **File** menu, select the **Department Journal** option.
- ⊕ Highlight the year, month, and day the inspections are scheduled.
- ⊕ Press **Options**, then select **Export Incomplete Inspections for (date) to PDA**. The **Pocket PC Data Export** form is displayed.
- ⊕ Highlight occupancies that you wish to inspect, then press **OK**.
- ⊕ Select the occupancy and/or scheduled inspection items to include in the export:
 - ⊕ To exclude an occupancy record and inspection, uncheck the occupancy record listing.
 - ⊕ To export an inspection record, check the inspection record listing. Only one inspection record per occupancy can be exported.
 - ⊕ To export an occupancy record and blank inspection record, select the occupancy record listing (with no inspection items checked or listed for that occupancy).
- ⊕ Press **Next>**. The **Pocket PC Data Export** form *Step 2* section is displayed.
- ⊕ Select the staff members that perform inspections:



Onsite Inspections includes an Inspector field that lists available staff. If you have a large number of staff records, we recommend including only staff members that perform inspections. Including a large number of staff records can potentially impact Onsite Inspections performance.

- ⊕ To limit available inspectors, press **Select Staff Members**, highlight staff members to include (multi-select is enabled), press **OK** then **Next>>** and the *Step 3* section is displayed.
- ⊕ To include all staff members as available inspectors, press **Next>>** and the *Step 3* section is displayed.
- ⊕ Press **Finish**. Selected inspections are created in Pocket PC format and placed in the **Export** subdirectory of the synchronization folder.
- ⊕ Press **Close**.

To Select Records for Export Without Uploading to Pocket PC

- ⊕ From the **File** menu, select **Inspections>Export Inspection Records to Pocket PC**. The **Pocket PC Data Export** form is displayed.
- ⊕ Press **Select Occupancy/Inspection Records to Export**. The default occupancy query of available occupancies is displayed. You can select any occupancy query.
- ⊕ Highlight occupancies that you wish to inspect, then press **OK**.
- ⊕ Select the occupancy and/or scheduled inspection items to include in the export:
 - ⊕ To exclude an occupancy record and inspection, uncheck the occupancy record listing.
 - ⊕ To export an inspection record, check the inspection record listing. Only one inspection record per occupancy can be exported.
 - ⊕ To export an occupancy record and blank inspection record, select the occupancy record listing (with no inspection items checked or listed for that occupancy).
- ⊕ Press **Next>**. The **Pocket PC Data Export** form *Step 2* section is displayed.
- ⊕ Select the staff members that perform inspections:



Onsite Inspections includes an *Inspector* field that lists available staff. If you have a large number of staff records, we recommend including only staff members that perform inspections. Including a large number of staff records can potentially impact Onsite Inspections performance.

- ⊕ To limit available inspectors, press **Select Staff Members**, highlight staff members to include (multi-select is enabled), press **OK** then **Next>>** and the *Step 3* section is displayed.
- ⊕ To include all staff members as available inspectors, press **Next>>** and the *Step 3* section is displayed.
- ⊕ Leave *Transfer files after export* unchecked.
- ⊕ Press **Finish**. Selected inspections are created in Pocket PC format and placed in the **Export** subdirectory of the synchronization folder.
- ⊕ Press **Close**.

You still need to upload the exported records to the Pocket PC.

Manually Uploading Exported Records

If you selected records to export to Onsite Inspections but you did not upload the files to a Pocket PC, these files are in the **Export** subdirectory and can be manually uploaded at any time. For example, if one person selects records to be inspected from their workstation, and a different person performs the inspection, the person performing the inspection can upload the selected records from their workstation.

To Manually Upload Exported Records

- ⊕ Connect the Pocket PC to the dock computer. Verify that Onsite Inspections on the Pocket PC is closed.
- ⊕ From FH on the dock computer, select **Tools** menu, **Pocket PC Tools** option **Upload Files to Pocket PC** option.
- ⊕ If prompted "This database already exists. Do you want to replace this database?" press **Yes**.

Records in the **Export** subfolder of the synchronization folder are uploaded to the Pocket PC. The upload process may take several minutes depending on the connection speed between the dock computer and Pocket PC, number of selected records, and speed of the Pocket PC.

Chapter 4

Use Onsite Inspections on the Pocket PC

Onsite Inspections is an FH application that runs on your Pocket PC and allows inspectors to complete occupancy inspections and update occupancy information on a Pocket PC. After you have exported inspections from the dock computer and uploaded them to the Pocket PC, you are ready to start using Onsite Inspections.

Instructions for exporting inspections to the Pocket PC start on page 16.

Configuring Onsite Inspections

There are several configuration options that control Onsite Inspections behavior.

About Configuration Options

Available configuration options will vary depending on your Pocket PC's operating system.

To Set Configuration Options (Windows for Pocket PC 2000 or 2002)

- ⊕ Tap the Pocket PC Windows **Start** menu, then **FIREHOUSE Software**.
- ⊕ Tap Inspections, select an inspection then tap **OK**. Select an inspection type if prompted.
- ⊕ Tap the **Tools** menu **Configuration** option. The **Configuration Options** form is displayed.
- ⊕ Specify configuration options:
 - ⊕ Check *Automatically Save on Exit* to save each form section automatically when you exit the form section. If this is not checked, you are prompted to save changes as soon as you leave a form section.
 - ⊕ Check *Use Hardware Keyboard* to enter data into Onsite Inspections using a hardware keyboard connected to your Pocket PC. If this is checked, the on-screen keyboard will not automatically pop up when data entry fields are tapped.
 - ⊕ Check *Prompt User to Recheck Previous Violations* to display previous violations (if they exist) after the **Inspection** form *Basic Inspection Information* section. Previous violations are available from the **Inspection** form *Inspection Checklist* section **Prev Violations** button (only available when previous violations exist).
 - ⊕ Check *Display Occupancy Address Before Name in Inspection Browser* if inspections will be selected by address instead of the occupancy name (occupancy name is still listed but you will have to scroll to the right to see it).
 - ⊕ Check *Default Recheck Date With Most Recently Entered Recheck Date* to insert the most recently used *Recheck Date* for a failed inspection item when *Violation Noted* is selected for a previous violation.
 - ⊕ Check *Default Repaired Date to System Date if Selected* to insert the system date when *Repaired* is checked for a previous violation.

- ⊕ Check *Default Inspector* to insert the specified Inspector if the *Inspector* value is empty in the inspection record.
- ⊕ Tap **OK** to save options, or **Cancel** to exit without saving changes.
- ⊕ Tap the **Form** menu **Exit** option.

You are ready to complete inspections and update occupancy information on your Pocket PC.

To Set Configuration Options (Windows for Pocket PC 2003 or CE.Net)

- ⊕ Tap the Pocket PC Windows **Start** menu, then **FIREHOUSE Software**.
- ⊕ Tap **Inspections**, select an inspection then tap **OK**. Select an *Inspection Type* if prompted.
- ⊕ Tap the **Tools** menu **Configuration** option. The **Configuration Options** form is displayed.
- ⊕ Specify configuration options:
 - ⊕ Select *Prompt User to Recheck Previous Violations automatically* to display previous violations (if they exist) after the **Inspection** form *Basic Inspection Information* section. Previous violations are available from the **Inspection** form *Inspection Checklist* section **Prev Violations** button (only available when previous violations exist).
 - ⊕ Check *Display Occupancy Address Before Name in Inspection Browser* if inspections will be selected by address instead of the occupancy name (occupancy name is still listed but you will have to scroll to the right to see it). Records are sorted by the initial column.
 - ⊕ Check *Default Recheck Date With Most Recently Entered Recheck Date* to automatically insert the most recently used *Recheck Date* for a failed inspection item when *Violation Noted* is selected for a previous violation.
 - ⊕ Select *Default Repaired Date to System Date if Selected* to automatically insert the system date when *Repaired* is checked for a previous violation.
 - ⊕ Press **Next Pg>>**.
 - ⊕ Check *Automatically Save on Exit* to save each form section automatically when you exit the form section. If this is not checked, you are prompted to save changes as soon as you leave a form section.
 - ⊕ Check *Use Hardware Keyboard* to enter data into Onsite Inspections using a hardware keyboard connected to your Pocket PC. If this is checked, the on-screen keyboard will not automatically pop up when data entry fields are tapped.

- ⊕ Check *Preprocess All Responses For Checklists With Less than* and specify the number of items to select the default maximum number of records to pre-process for the checklist. If the checklist includes fewer items than the selected number, all checklist responses are pre-created when the inspection is selected. If the number of checklist items is greater than the specified maximum, only one page of inspection items is created. Additional checklist item pages are processed when you display the page. For inspections that include inspection checklists with many items, specifying a preprocess maximum minimizes the time to display the inspection.
- ⊕ Select *Default Inspector* automatically inserts the specified Inspector if the Inspector value is empty in the inspection record.
- ⊕ Tap **OK** to save options, or **Cancel** to exit without saving changes.
- ⊕ Tap the **Form** menu **Exit** option.

You are ready to complete inspections and update occupancy information on your Pocket PC.

Using Onsite Inspections

Once you have installed FH Onsite Inspections and uploaded some records from the dock computer to the Pocket PC, you are ready to access records on your Pocket PC.

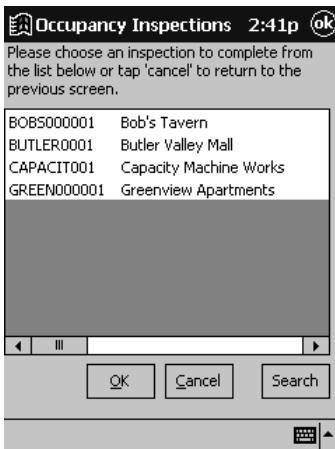
To Complete A Basic Inspection

- ⊕ Tap the Pocket PC Windows **Start** menu, then **FIREHOUSE Software**.



The FIREHOUSE Software Onsite Inspections splash screen is displayed.

- ⊕ Tap Inspections.

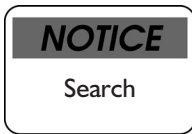


The Occupancy Inspections query lists available inspections sorted by occupancy name.

Accessed directly from the Records menu Browse option.

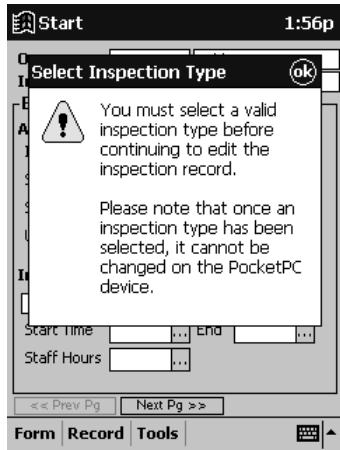
Windows for Pocket PC 2000 shown, yours may vary.

- ⊕ Tap a listed record then tap **OK**.



Press **Search** and type an occupancy name, or part of an occupancy name, to locate an occupancy inspection in a long list.

If no *Inspection Type* is included in the opened inspection, you are prompted to assign an *Inspection Type*.



⊕ Tap **ok** to prompt



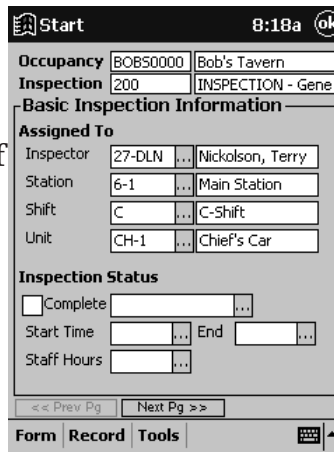
The selected *Inspection Type* is added to the inspection record and can not be edited on the Pocket PC, so choose carefully.

⊕ Select a code (if the codes are grouped, you first select a group). The inspection is displayed.

If an inspection type is included, the **Inspection** form *Basic Inspection Information* form is displayed.

- ⊕ Tap the *Complete* check box to add a checkmark (indicating that the inspection is complete) and select the *Complete* date.
- ⊕ Complete remaining basic inspection information as needed. Each field displays a list of valid values when you tap

- ⊕ Lookup fields display valid lookup code values. Select *Group*: (if applicable) and then code value, then press **OK**.
- ⊕ Date fields display a calendar dialog. Select desired date then press **Ok**.
- ⊕ Time fields display a time dialog. Enter the hour and minute, then press **OK**.



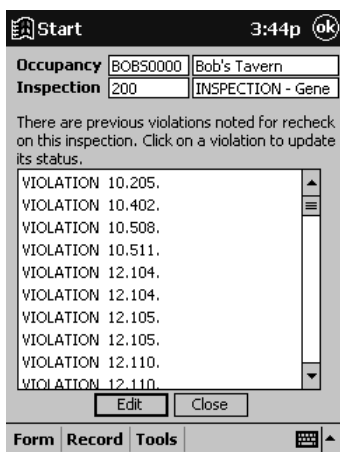
Accessed directly from the **Form** menu **Inspection Basic** option.



You can navigate through the form sections using the buttons at the bottom of the form. If the buttons are used before the form fully displays, you might skip a section. All Onsite Inspections record form sections are also accessible directly from the **Form** menu.

- ⊕ Tap **Next Pg >>** to complete the inspection checklist. If there are no previous violations, the inspection checklist is displayed. An inspection checklist can span multiple sections. See 'Complete Inspection Checklist' on page 28 for steps.

When previous violations are included in the inspection record exported from the FH dock workstation, they are automatically listed before the Inspection form *Inspection Checklists* section is displayed the first time the inspection record is opened. This allows an inspector to review previous violations only, without going through the inspection checklist. Previous violations may include inspection items that are not included in the inspection checklist.



Previous violations can be displayed at any time using the **Prev Violations** button at the bottom of the **Inspection** form *Inspection Checklists* section. The **Prev Violation** button is not available if no previous violations exist for the inspection record.

- ⊕ Highlight a previous violation and press **Edit**.

Violation notes are displayed. Review violation details, then select the appropriate option:

- ⊕ Check *Violation Noted - Reported* if the violation still exists, but no reinspection is necessary.
- ⊕ Check *Violation Noted - Recheck Dt* and specify a date to reinspect. The date can automatically be inserted. See 'Set Onsite Inspections Configuration Options' on page 19 for details on enabling.
- ⊕ Check *Repaired* and specify the date the violation was repaired (or noted as repaired). The date can automatically be inserted. See 'Set Onsite Inspections Configuration Options' on page 19 for details on enabling.
- ⊕ Press **Ok**. Review additional previous violations as necessary.
- ⊕ Press **Close** when finished reviewing previous violations.

The **Inspection** form *Inspection Checklist* section is displayed. Complete remaining sections as necessary. Typically, when the inspection is for reviewing previous violations only, you are finished with the inspection. See 'Save Inspection Record' on page 29 if you are finished with the inspection.

Complete Inspection Checklist

The Inspection form Inspection Checklist section lists inspection items you set up in FH via the File menu Inspections option Inspection Checklist option, or via the Administrative Options form Occupancy section form. See page 11 for details on setting inspection checklists up.

The Prev Violations button is only included in the lower right corner if previous violations for the inspection exist.

Accessed directly from the Form menu Checklist option.

The inspection checklist is also available from the Inspection form Violations section in FH at the dock computer. See the FH Online Guide 'FIREHOUSE Software Inspection Checklist' topic for additional information.

- ⊕ Each field displays a list of valid values when tapped:
 - ⊕ Tap to enter the inspection item status. Values are *Pass*, *Fail*, or *N/A*.
 - ⊕ If the inspection item is *Fail*, enter notes for the item. Type a *Count* value if there are multiple violations of this type. If you add a *Scheduled Recheck* date, you are prompted to create a scheduled inspection when the completed inspection record is imported into FH. You can also note a *Repaired* date if relevant.

See 'Import Completed Inspections', page 32 for information on importing completed inspection records from the Pocket PC.

- ⊕ Complete necessary inspection items. There may be multiple pages of inspection items depending on the inspection checklist.
- ⊕ Tap to complete responsible name and address information.

- ⊕ Each field is text-entry. Tap and use standard text entry methods to enter field value.
- ⊕ Tap to complete

The **Inspection** form **Responsible Name/Addr** section displays inspection responsible party name and basic address. Press **Select From Occupancy Contacts** to complete this section using information from an occupancy contact record. Accessed directly from the **Form** menu **Responsible Party** option **Name/Address** option.

responsible name phones and emails.

The screenshot shows a mobile application interface. At the top, there is a 'Start' button and a time display '3:04p'. Below this, there are two rows of data: 'Occupancy' with values 'BOB50000' and 'Bob's Tavern', and 'Inspection' with values '200' and 'INSPECTION - Gene'. The main section is titled 'Responsible Phone/Email'. It contains two sub-sections: 'Phone' and 'EMail'. The 'Phone' section has a table with three columns: 'Type', 'Phone', and 'Ext'. The 'EMail' section has a single column labeled 'EMail Address'. At the bottom of the form, there are navigation buttons: '<< Prev Pg' and 'Next Pg >>'. A menu bar at the very bottom contains 'Form', 'Record', and 'Tools'.

The **Inspection** form *Responsible Phone/Email* section displays inspection responsible party phone and email information.

Accessed directly from the **Form** menu **Responsible Party** option **Phone/Email** option.

- ⊕ Each field displays a list of valid values when tapped:
 - ⊕ Phone fields display a contact phone dialog. Enter a *Phone Type*, *Phone*, and *Extension* (if applicable), then press **OK**.
 - ⊕ Email fields display a text entry field. Enter email address information then press **OK**.
- ⊕ Tap **Next Pg >>** to complete inspection notes.

Save Inspection Record

- ⊕ Select **Record** menu, **Save** option to save changes.
- ⊕ Browse for additional occupancies from the **Record** menu, **Browse** option.

About Signatures

Signatures can only be added to completed inspections. Typically, the signature will be from the responsible party. Signature functionality is specified from the dock computer via the **Administrative Options** form *Database* section *Rules and Security* section. When the inspection is imported back into the FH dock computer, the signature is attached to the inspection record.

To Add A Signature

- ⊕ Tap the Pocket PC Windows **Start** menu, then **FIREHOUSE Software**.
- ⊕ Tap **Inspections**.
- ⊕ Tap a listed occupancy inspection then tap **OK**.
- ⊕ Tap the **Form** menu, **Signature** option.

- ⊕ Enter a signature.
- ⊕ Tap **OK** to add signature to record.

Updating Occupancy Information

You can access and edit basic occupancy contact information.

To Update Occupancy Information

- ⊕ Tap the Pocket PC Windows **Start** menu, then **FIREHOUSE Software**.
- ⊕ Tap **Inspections**.
- ⊕ Tap a listed occupancy inspection then tap **OK**. Select an inspection type if prompted.
- ⊕ Tap the **Form** menu. Available **Form** menu options for specific occupancy forms are listed below.

For basic address information select the Occupancy Basic option, Address option.

For contact information select the Occupancy Basic option, Phone/Email option.

For property usage information select the Building Info option, Property Use option.

Start 3:53p OK

Occupancy BOBS0000 Bob's Tavern
 Inspection 200 INSPECTION - Gene

Occupancy Address

Number 851 Prefix
 Street/Hwy Center
 Street Type AVE Street Suffix
 Box/Line 2
 Apt
 City, St, Zip Butler PA 16001
 Census 1510.00

District
 Response 02 Box 10-02, Down
 Inspection 02 Box 10-02, Down

<< Prev Pg Next Pg >>

Form Record Tools

Start 3:53p OK

Occupancy BOBS0000 Bob's Tavern
 Inspection 200 INSPECTION - Gene

Occupancy Phone/Email

Ph Type	Phone	Ext
WORK	412-332-8877	

Email Address

<< Prev Pg Next Pg >>

Form Record Tools

Start 1:20p OK

Occupancy 000003 ABC CLEANERS
 Inspection 700 INVESTIGATION - G

Property Use

Use 564 Laundry, dry cle
 Mixed Use 51 Row of stores
 Ownership
 Construction 6 Unprotected Or
 Structure
 Building Status
 Building Class B8 LAUNDROMAT /
 Roof Covering 7 Built-Up

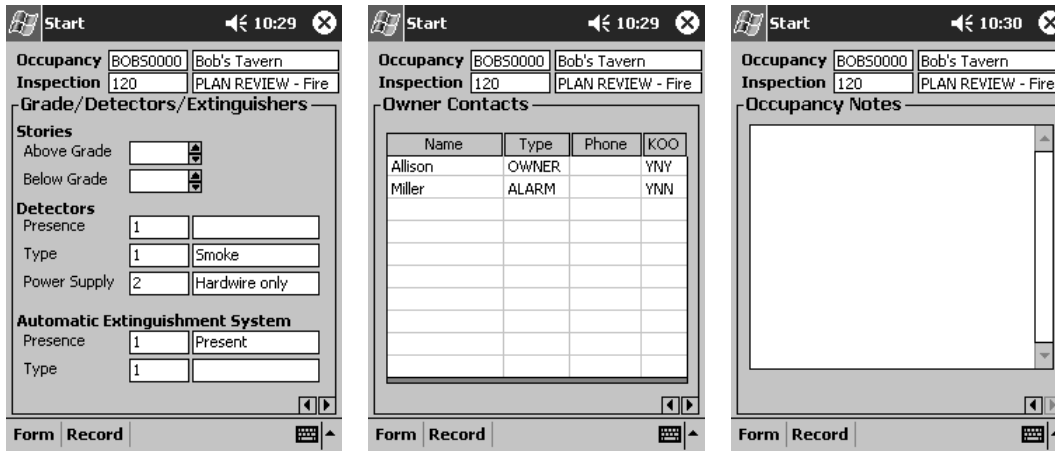
<< Prev Pg Next Pg >>

Form Record Tools

For property usage information select Building Info, Grade/Detectors/ Extinguishers option.

For occupancy contacts information select the Occupancy Contacts option.

For occupancy notes select the Occupancy Notes option.



- ⊕ Browse a different occupancy record by selecting the **Record** menu, **Browse** option. Tap the occupancy form name then press **OK** to display.

You can navigate through the form sections using the << Prev Pg | Next Pg >> buttons at the bottom of the form, or access a section directly via the Form menu.

Printing Reports

Onsite Inspections includes basic reports that can be printed from the Pocket PC if printing is configured for the device. You must have a Pocket PC compatible printer configured for the device to print Onsite Inspections reports. Only completed inspection records can be printed.

To Print Report

- ⊕ Tap the Pocket PC Windows **Start** menu, then **FIREHOUSE Software**.
- ⊕ Tap **Inspections**.
- ⊕ Tap a listed occupancy inspection then tap **OK**.
- ⊕ Tap the **Record** menu **Print** option. All available standard and custom reports are listed.
- ⊕ Select report to run.

We provide basic reports. Details on creating your own custom reports are listed in Appendix A on page 3.

- ⊕ The selected report is displayed in the **Print Preview** window.
- ⊕ Press **Print**. Assuming that you have a working serial or infrared connection between your computer and a printer:
 - ⊕ The **Windows Print** dialog box appears.
 - ⊕ Set the options as desired and click **OK**.
- ⊕ Press **Close**. You can select another report, or press **Exit**.

The report is sent to the printer.

Chapter 5

Move Records to Dock Computer

There are two steps involved in moving records from the Pocket PC to the dock computer:

- Download records from the Pocket PC to the dock computer, and
- import records.

Both steps are usually completed at the same time from the dock computer with the Pocket PC connected (as detailed in 'Import Completed Inspections from Pocket PC', below), but there are situations where the download and import need to be performed separately. For example, if occupancy and inspection records are downloaded from the Pocket PC by one person and the import is performed by a different person, the steps may need to be performed separately. Downloaded files are placed in the **Import** subfolder of the synchronization folder, and can be imported from any dock computer. The procedure for downloading records from the Pocket PC are listed in 'Download Records from Pocket PC', on page 36.

Importing Completed Inspections

Completed inspections and updated occupancy information in Onsite Inspections should be downloaded to the dock computer and imported as soon as possible. If updated Onsite Inspections records are not downloaded in a timely manner, and occupancy records are updated in FH, these modifications could be overwritten when the Onsite Inspections records are imported from the Pocket PC.



Onsite Inspections should not be transferred from the Pocket PC to the dock computer more than one time.

If you export an occupancy to the Pocket PC, update the occupancy then import it back to FH on the dock computer, and need to return to that same occupancy for another inspection, you should export the occupancy from the dock computer to the Pocket PC rather than use the occupancy record currently on the Pocket PC. You can opt to clear FH Onsite Inspections records.

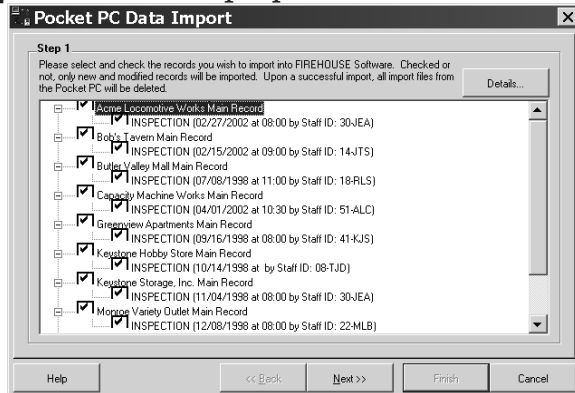
Downloading and Importing Completed Inspections

You can download and import completed inspections as soon as the inspection records are saved.

To Download and Import Completed Inspections

- ⊕ Connect the Pocket PC to the dock computer. Verify that Onsite Inspections on the Pocket PC is closed.
- ⊕ From the **File** menu, select **Inspections>Import Inspection Records from Pocket PC**.
 - ⊕ If complete inspections have been downloaded from the Pocket PC, the **Pocket PC Data Export** form is displayed.

- ⊕ If completed inspections have not been downloaded from the Pocket PC, you are prompted to transfer them. Select **Yes** to prompt and files are transferred. Press **OK** when prompted and the **Pocket PC Data Import** form is displayed.



All occupancies and inspections from Onsite Inspections are displayed. Checked items will be imported, overwriting existing records.

- ⊕ Review what is included in the import if desired. Select item and press **Details...**. Information included varies depending on what information is included in the record:
 - ⊕ If the main occupancy item was selected, the **Record View** form includes the occupancy record, an occupancy contact, occupancy phone number(s), and occupancy email(s).
 - ⊕ If the scheduled inspection was selected, the **Record View** form includes the inspection record, and if included, violation record(s) reported, inspection phone number(s), and email address(es).
 - ⊕ When a record has been updated, the record's title indicates that the record has been updated.
 - ⊕ When a detail record has been deleted, the record's title indicates that the record has been deleted.
 - ⊕ Press **OK** to close the **Record View** form.
- ⊕ Uncheck items you wish to exclude from the import:
 - ⊕ Uncheck an occupancy if you do not want to import updated occupancy information and the inspection record.
 - ⊕ Uncheck an occupancy inspection if you do not want to import the inspection record but still want to import the occupancy information.
- ⊕ Press **Next>>**. Check *Clear Pocket PC files after import* to erase all records on the docked Pocket PC.
- ⊕ Press **Finish**. All modified occupancies and inspections are imported into FH. System rules and validation is active and the **Validation Result** form is displayed. When completed inspection record from the Pocket PC include failed inspection items with a date, you are prompted to create a scheduled inspection for each unique date specified.



Files in the **Import** subdirectory of the synchronization folder are permanently deleted after inspection records are successfully imported into FH from the Pocket PC unless otherwise specified

in the **Workstation Options** form. See 'Specify Workstation Options' on page 10 for details.

To Download Records to Dock Computer Without Importing into FH

- ⊕ Connect the Pocket PC to the dock computer. Verify that Onsite Inspections on the Pocket PC is closed.
- ⊕ From the **Tools** menu, select the **Pocket PC Tools** option **Download Files from Pocket PC** option. Records from the Pocket PC are downloaded to the **Import** subfolder of the synchronization folder.

The download process may take several minutes depending on the connection speed between the dock computer and Pocket PC, number of records, and speed of the Pocket PC.

FH checks for files in the **Import** subfolder of the synchronization folder at login and prompts you to import the files.

Reviewing Import/Export Activity

You can view a log of Onsite Inspections export and import activity.

To Review Import/Export Activity

- ⊕ From the **Tools** menu, select the **Pocket PC Tools** option **View Pocket PC Import/Export Log** option. The **Pocket PC Import/Export Log** form is displayed.
- ⊕ Check *Show entries performed at this workstation only* to display Onsite Inspections activity performed at this workstation only.
- ⊕ Highlight an entry and press **Detail** to view details about the export or import.
- ⊕ Highlight an entry and press **Delete** to remove the entry.
- ⊕ Press **Purge** to remove all entries.
- ⊕ Press **Close** to exit.

Chapter 6

Troubleshooting

This chapter lists potential issues you may encounter using Onsite Inspections.

Problems On The Pocket PC

Below are some potential issues you may encounter from

File In Use

When you are prompted that files are in use on the Pocket PC, tap **No** to proceed. If the operation will not proceed, you need to close Onsite Inspections on the Pocket PC. To check to see if Onsite Inspections is running, do the following on the Pocket PC:

- ⊕ Tap the Windows **Start** menu.
- ⊕ Tap **Settings**.
- ⊕ Tap the *System* tab.
- ⊕ Tap **Memory**.
- ⊕ Tap the *Running Programs* tab.
- ⊕ If FIREHOUSE Software is included in the Running Program List:, highlight it.
- ⊕ Press **Stop**.

Files Not Synchronizing

Clients using FH Onsite Inspections and Microsoft ActiveSync version 3.7.1 have reported problems synchronizing FH Onsite Inspection records with your desktop. If your FH Onsite Inspections records are not being updated with records from the dock computer, you may be having problems synchronizing. If you have problems synchronizing FH Onsite Inspection records with your desktop and are using Microsoft ActiveSync version 3.7.1, we recommend uninstalling and reinstalling Microsoft ActiveSync version 3.7.

Chapter A

Custom Reports

Onsite Inspections includes default reports that can be printed from your Pocket PC. You can create additional reports for Onsite Inspections using Report CE® 4.0. Creating custom reports requires third-party software from Syware, Inc. More information on this product is available at <http://www.syware.com>.

Custom reports will be enabled and listed if they exist in the reports folder. For a custom report to be listed, the report name must start with CUST_. The CUST_ will be removed from the name in the custom reports list, and any underscores will be shown as spaces.

Reports are developed in Reports CE® 4.0. A table with the most common data elements has been created to simplify report creation. This table is called **FH.CDB**. Other tables in the data directory can be used if desired.

<hr/> A <hr/>		Overview	4
ActiveSync			
See Dock Computer, Requirements			
<hr/> D <hr/>		<hr/> P <hr/>	
Dock Computer		Pocket PC	
Activate Onsite Inspections	6	Install Onsite Inspections	6
Move records from		Memory required	3
Export and upload records	16	Move records to	
Upload records only	20	Export and upload records	16
Requirements	3	Upload records only	20
Set inspection checklist	11	OS required	3
Specify Onsite Inspection options in FH		What is it?	2
10,11			
User security	11	<hr/> S <hr/>	
What is it?	2	Synchronization folder	7
<hr/> F <hr/>		Change	10
FH root directory	7	Import subdirectory	10
<hr/> H <hr/>		named	7
HotSync	5	rights	7
<hr/> O <hr/>			
Onsite Inspections			
Activate on dock computer	6		
Move records to			
Export and upload records	16		
Upload records only	20		
Requirements	3		
Security	11		
Allow Synchronize Inspections			
on Handheld Device	11		
Allow Transfer files to/from			
Pocket PC	11		
Allow Update Inspection			
Checklists	11		