Identify & Report Professional

Identify & Report Professional User Manual Rev.B

IDENTIFY & REPORT
Home & Property Inspection Software

SOFTWARE CREATED
BY INSPECTORS FOR INSPECTORS
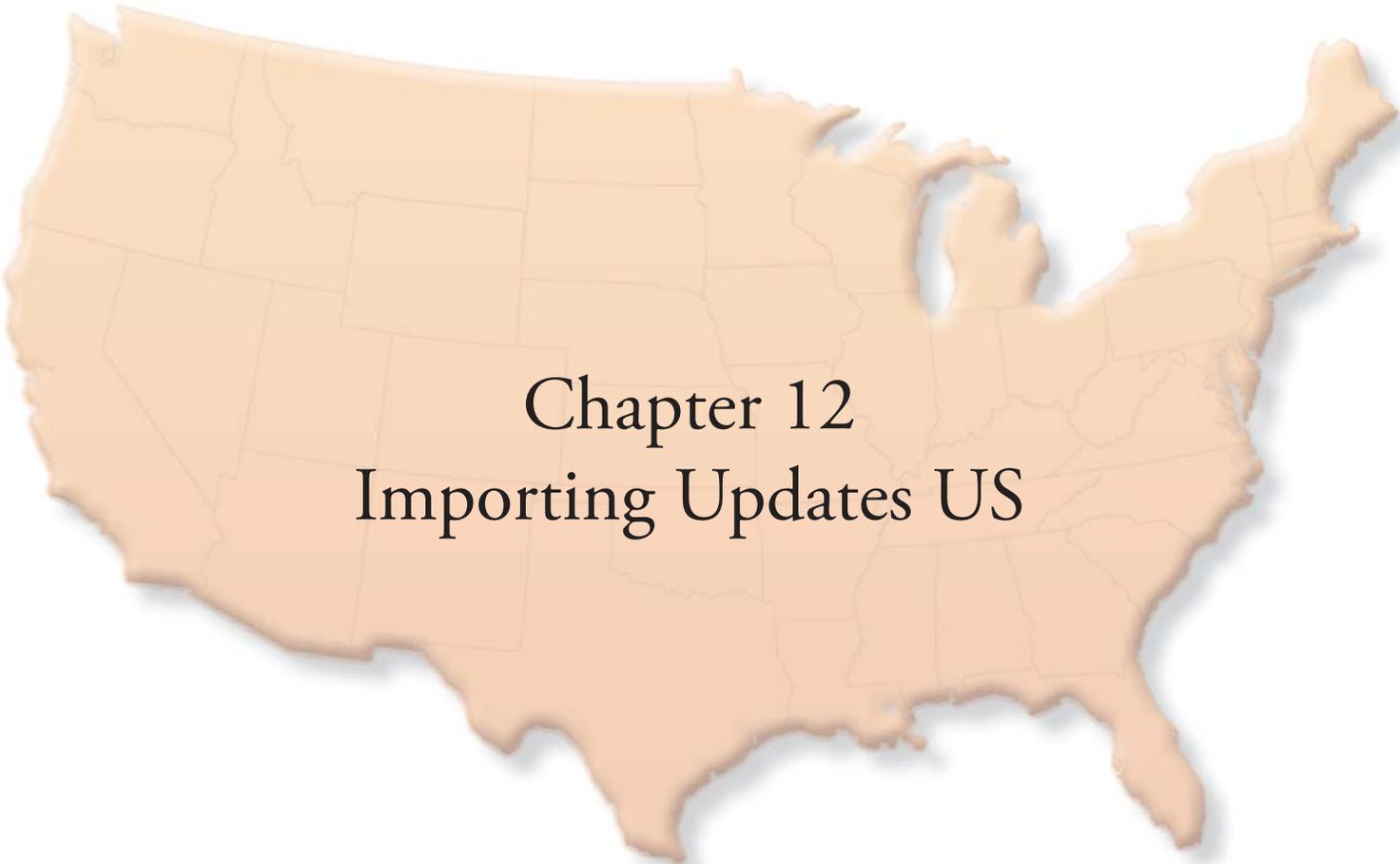
Chapter 12
Importing Updates US
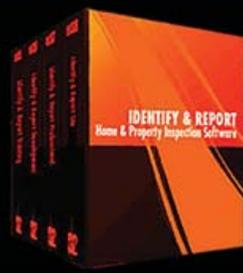
IF You Have any Questions
Phone: 760.650.1255
or Email:
Support@InspectionSoftware.com

Identify & Report Professional

Importing Updates

In this example we are going to Import three files "Inspection Control.Usr, ISDCNarrative.USR and ISDCNarrative Photos.Usr" From an older version of "Identify & Report Professional v12.05i" to "Identify & Report v12.06ip".

Select "Identify & Report Professional v12.05i" icon on Desktop to start "Identify & Report Professional"
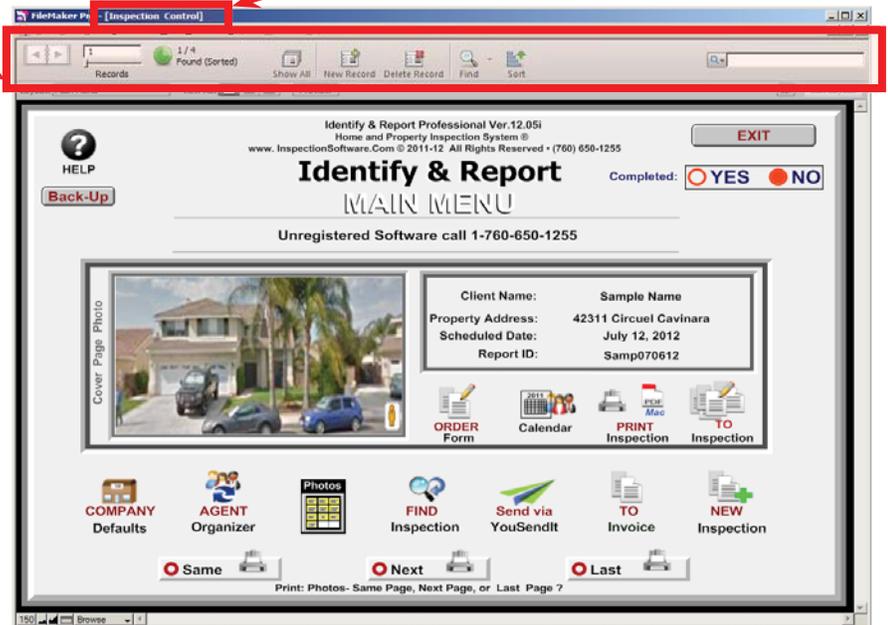
The "MAIN MENU" Opens.

You will need to turn on the Toolbar, by selecting the Toolbar switch in the bottom left corner.

First we will unlock "Inspection Control.Usr" from "Identify & Report Professional v12.05i"

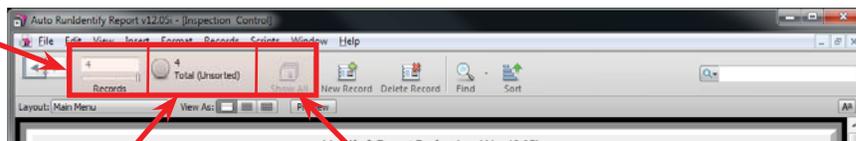Check to see that you are at [Inspection Control]

The Toolbar opens at top of window.

Select "Show All"

"Records" will change from one to how many Records (Inspections) you have, in this example four.
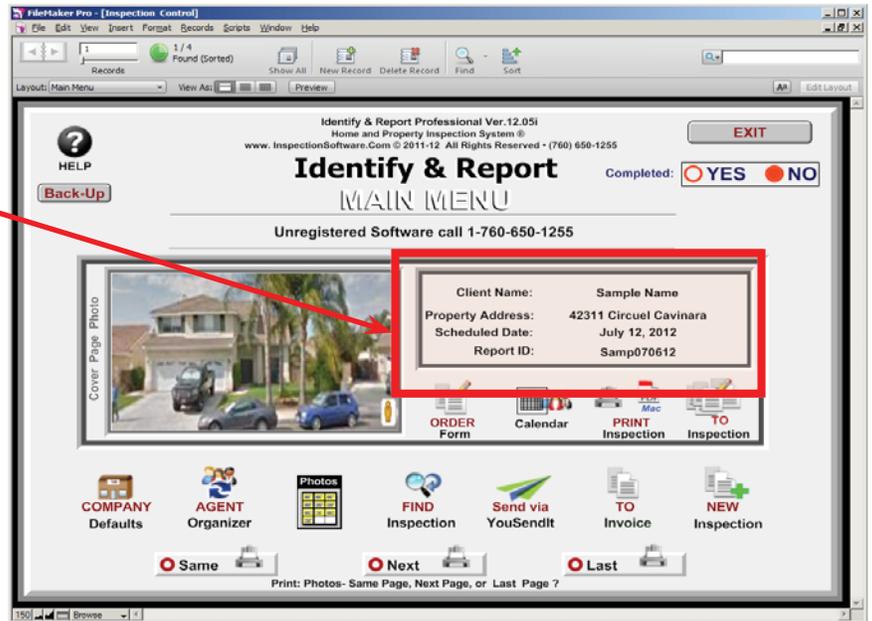

The "Total" will be grayed out.
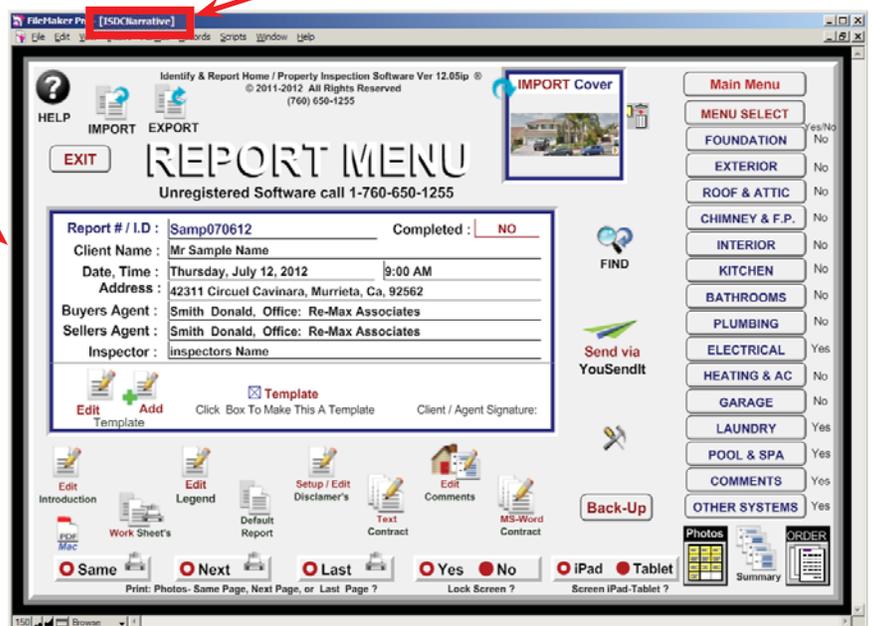
The "Show All" will be grayed out.

Next we will unlock "ISDCNarrative.USR" from "Identify & Report Professional v12.05i"
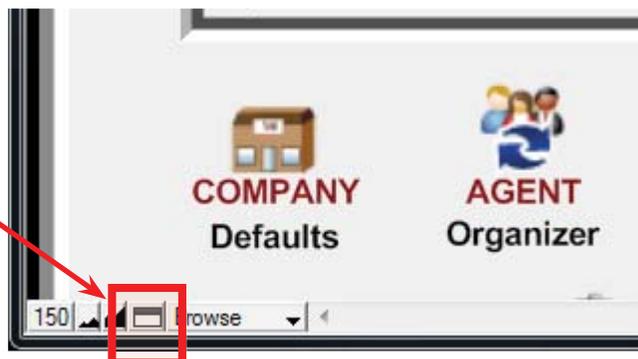

Select "Client Name:"
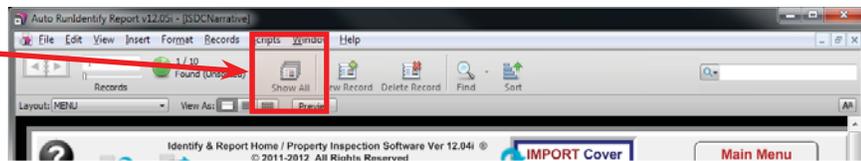
Check to see that you are at [ISDCNarrative]

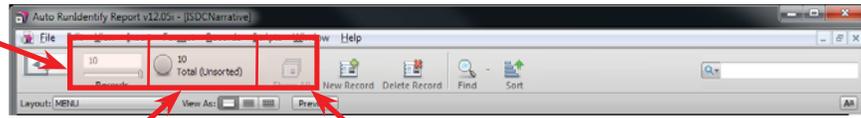This will open the "REPORT MENU"

You will need to turn on the Toolbar, by selecting the Toolbar switch in the bottom left corner.
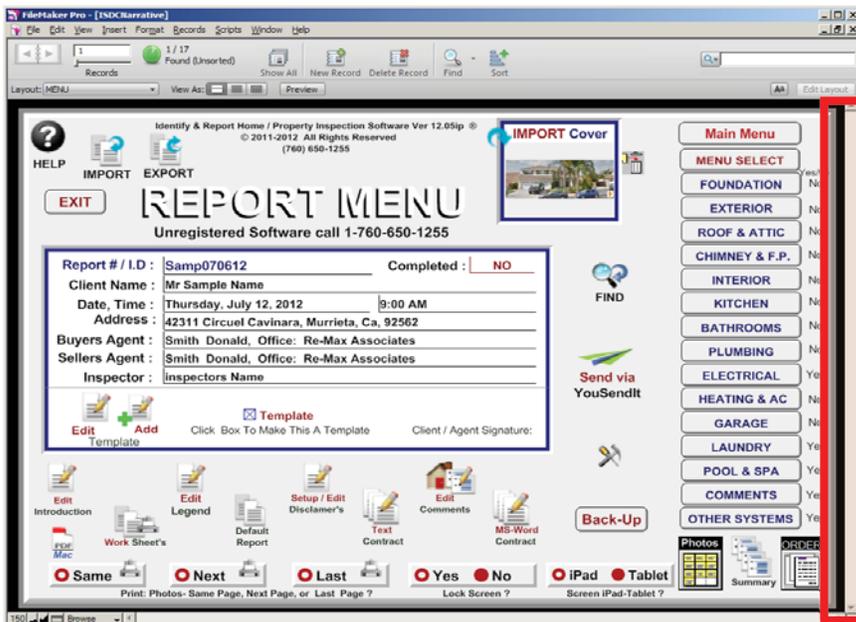
Select "Show All"

"Records" will change from one to how many Records (Narrative) you have, in this example ten.

The "Total" will be grayed out.

The "Show All" will be grayed out.

Finely we will unlock "ISDCNarrative Photos.Usr" from "Identify & Report Professional v12.05i"
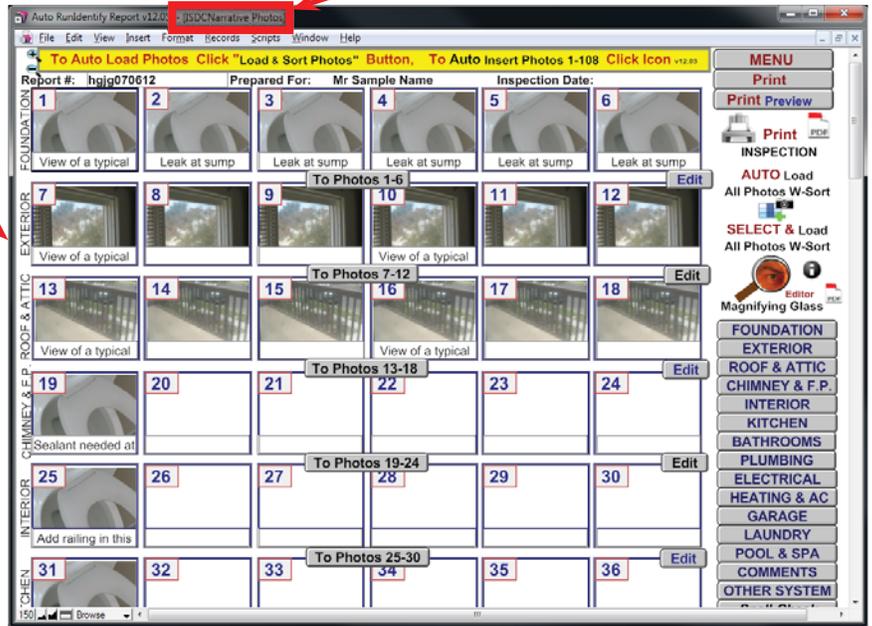

Scroll down to see "Photos"

Select the "Photos" icon

Check to see that you are at [ISDCNarrative Photos.]

This will open the "Photos"

You will need to turn on the Toolbar, by selecting the Toolbar switch in the bottom left corner.

Select "Show All"

"Records" will change from one to how many Records (Narrative) you have, in this example five.

The "Total" will be grayed out.

The "Show All" will be grayed out.

You have now unlocked "Inspection Control.Usr, ISDCNarrative.USR and ISDCNarrative Photos.Usr" data files, to be imported to the "Identify & Report Professional Australia" new updated version.
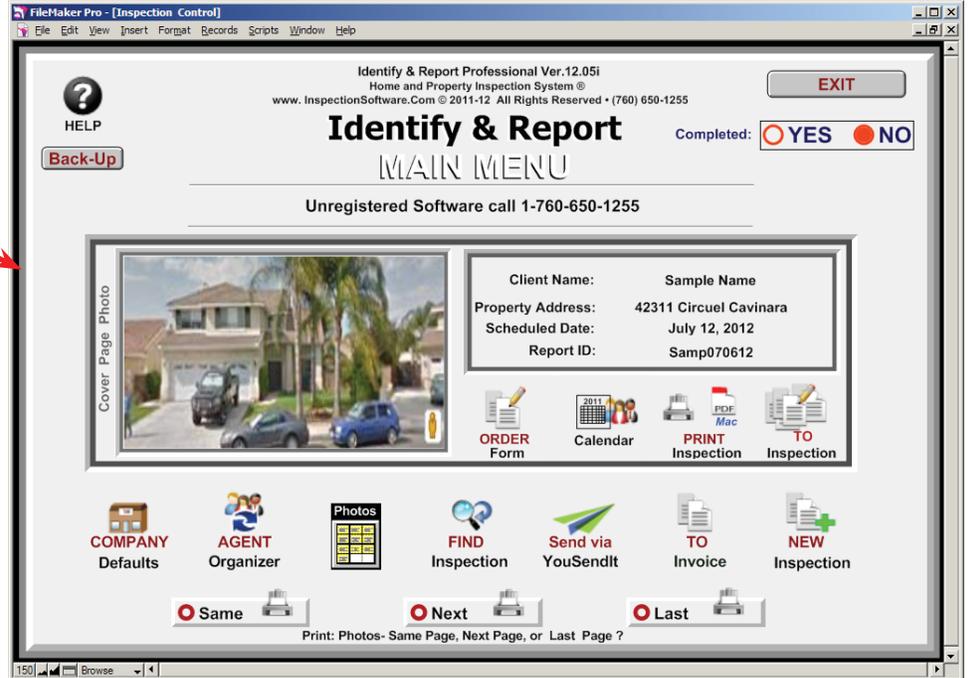
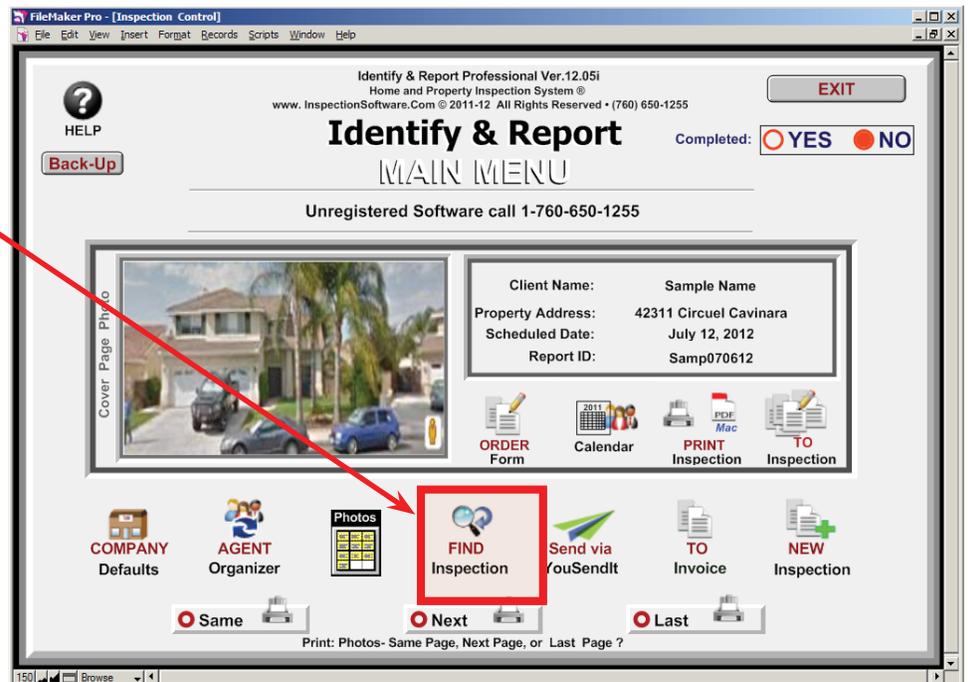Close "Identify & Report Professional Australia" by clicking on the Red "X"
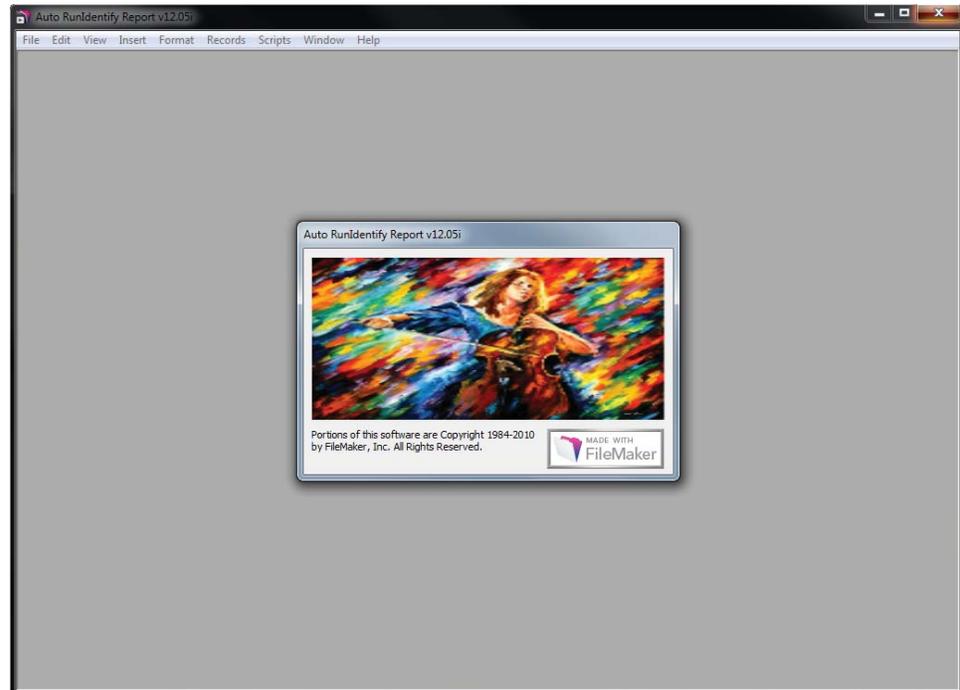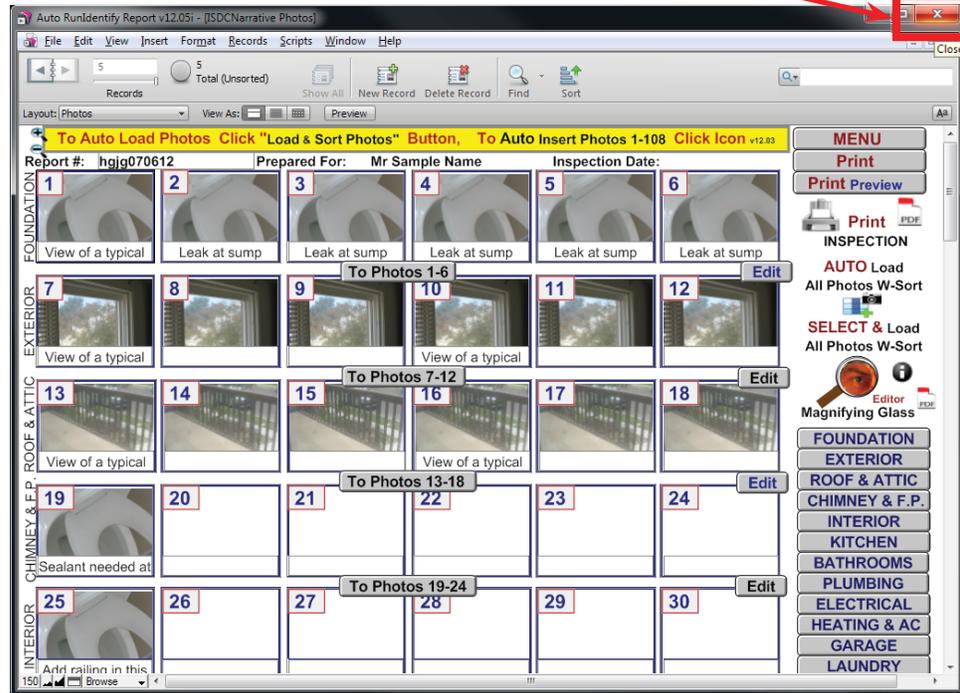
Select "Identify & Report v12.06ip" icon on Desktop to start "Identify & Report Professional"
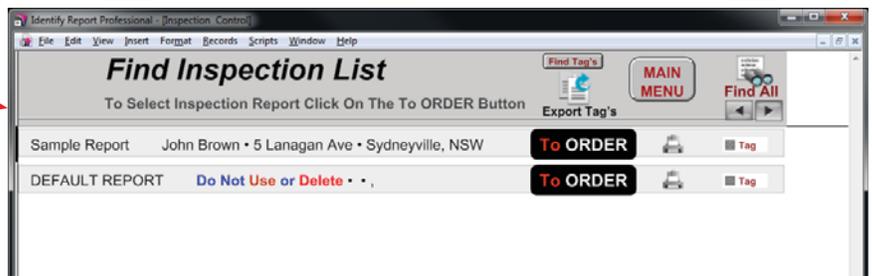

Identify & Report Professional
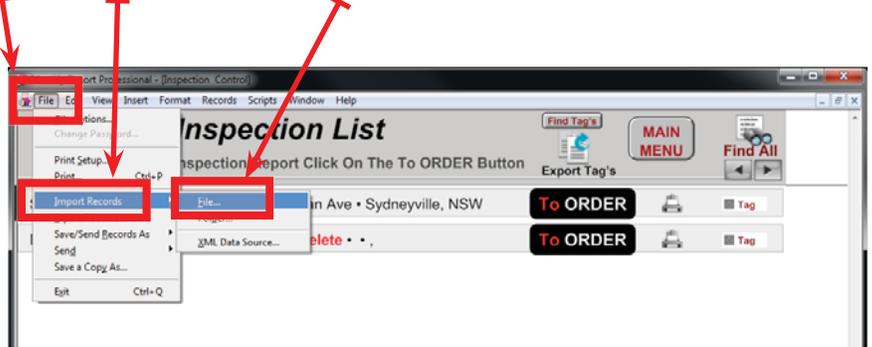
The "MAIN MENU" Opens.

Select "Find Inspection"
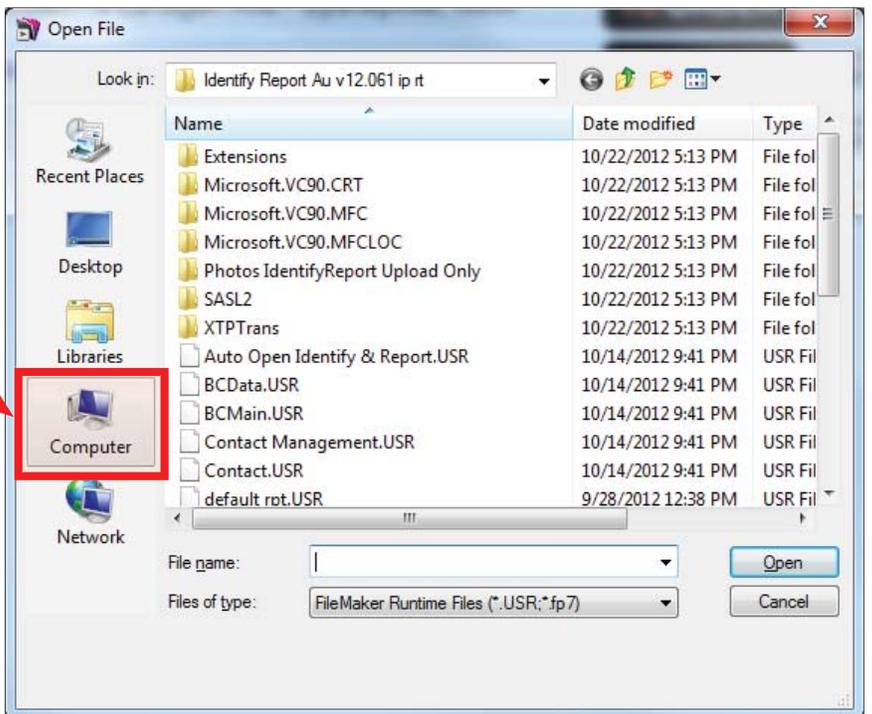
The "Find Inspection List "opens.

On the Toolbar select: File→Import Records → File

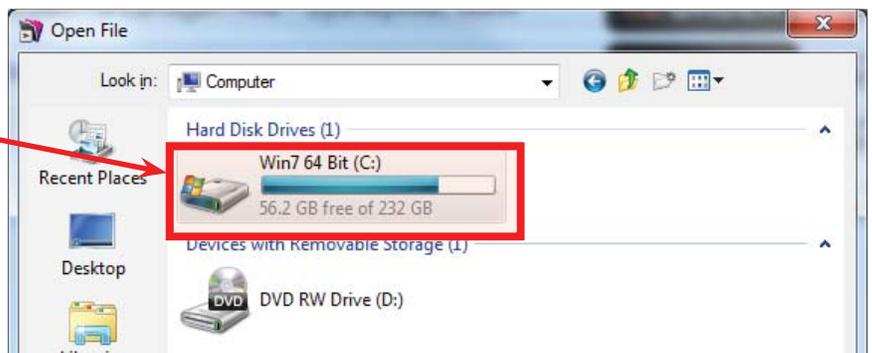The Open File window will open. You are in the New Version of "Identify Report" you need to go to the older version of "Identify Report" Folder.
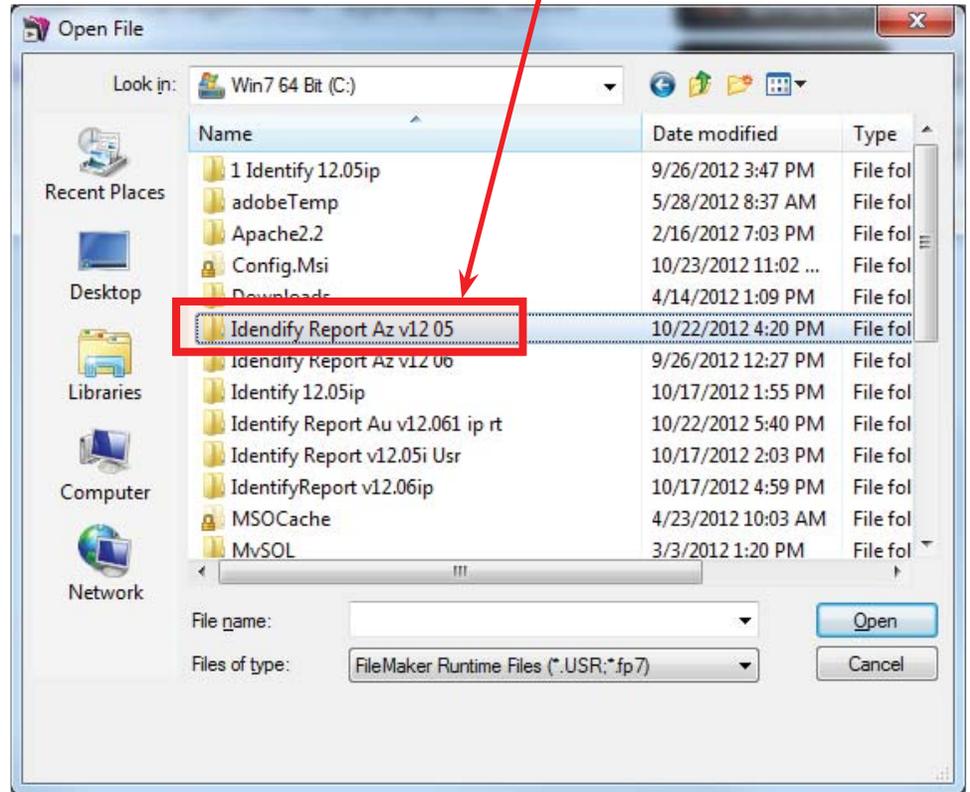
Click "Computer"

Select Drive C:/

First we will import "Inspection Control.Usr" from "Identify & Report Professional v12.05i"

Find the older version of "Identify Report" in this example we are using "Idendify Report Az v12 05"

Select "Inspection Control.Usr"
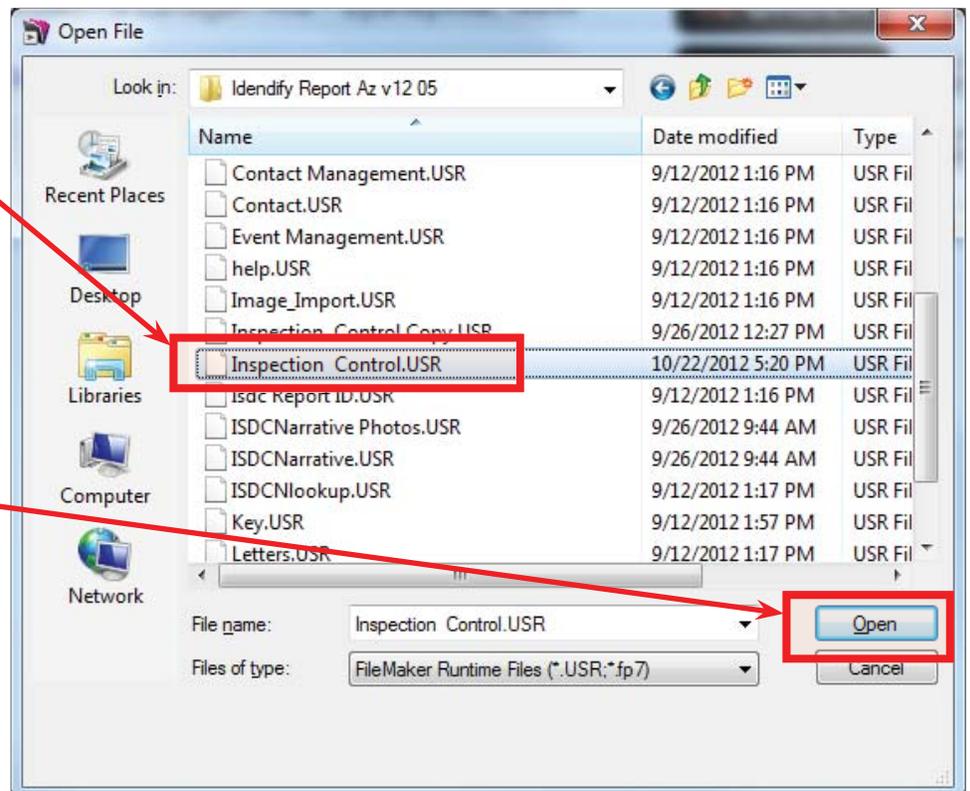
Then Select "Open"

The "Find Inspection List" opens

Select "File" from the Toolbar
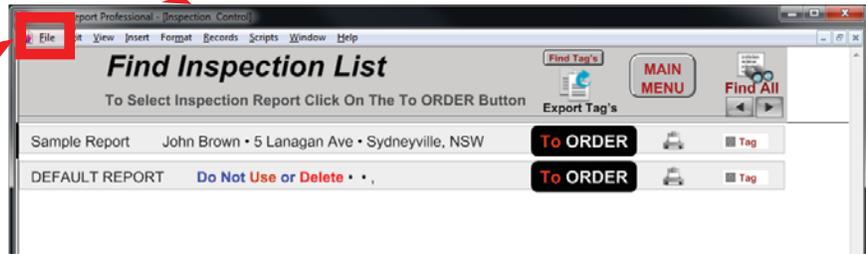
The "Import File Mapping" window opens.

There are three very important selections to be made.

1.
"Arrange by:"
"matching names"

2.
In the "Import Action" box check the radio button
"Update existing records in found set"

3.
Check box
"Add remaining data as new records"

"Import Option" window will open.
Make sure the "Perform auto-enter option while importing" box is checked

and
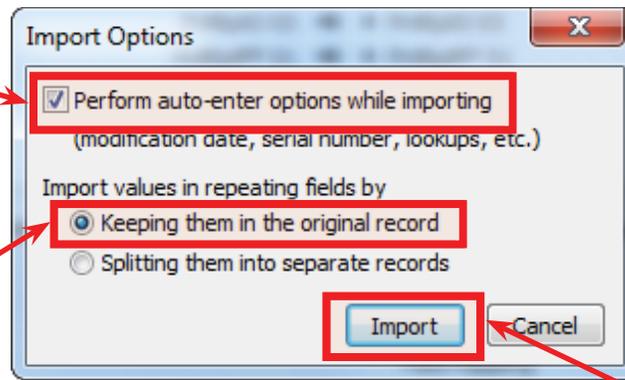
under the "Import values in repeating fields by
Keeping them in the original record" radio button is checked.

Then Select "Import"

The "Import Summary" Window will open. Don't need to do anything just click "OK".
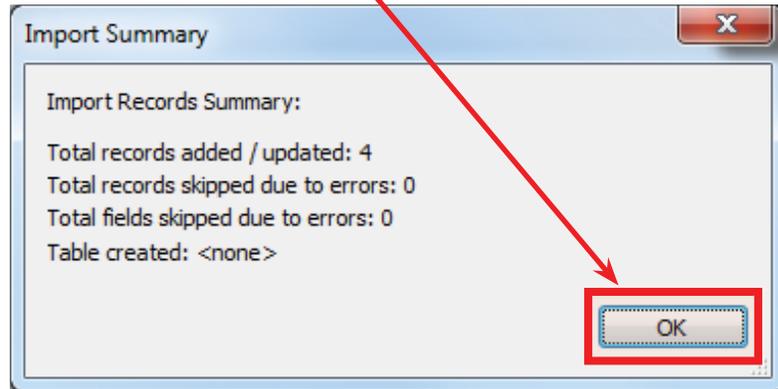
On the Toolbar select: Window →Show Window →(ISDCNarrative Photos)
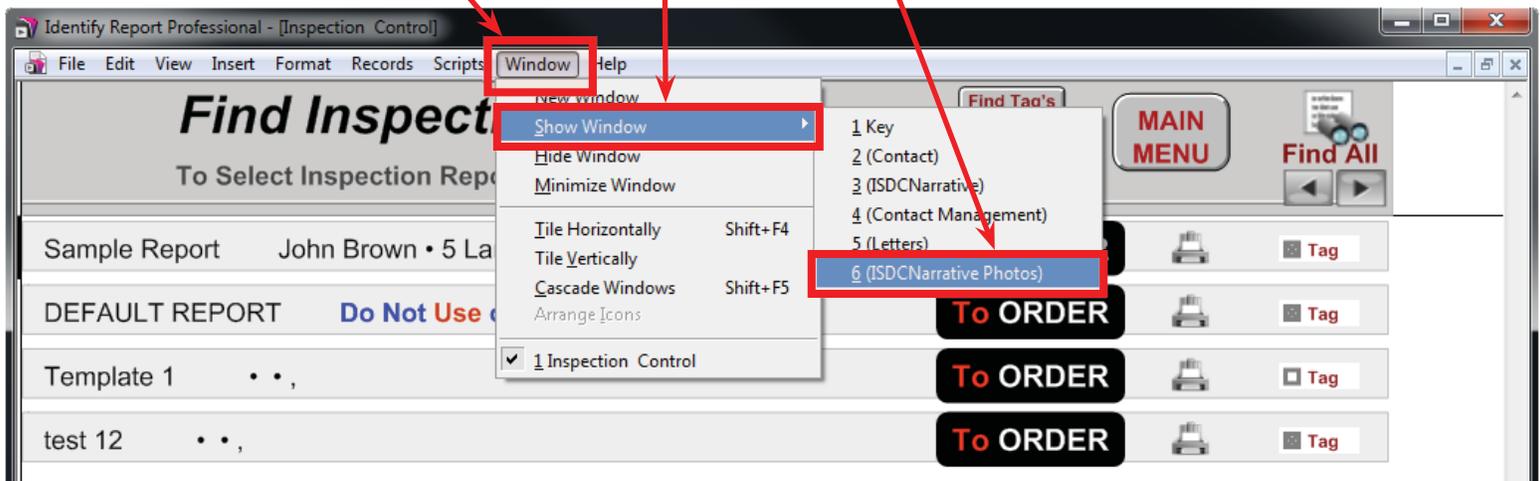
Next we will import "ISDCNarrative.USR" from "Identify & Report Professional v12.05i"

The "REPORT MENU" Window opens.
Check to see that you are at [ISDCNarrative]
On the Toolbar select:
File ⟶ Import Records ⟶ File

Scroll down until you find "ISDCNarrative.USR" and highlight then click "Open"
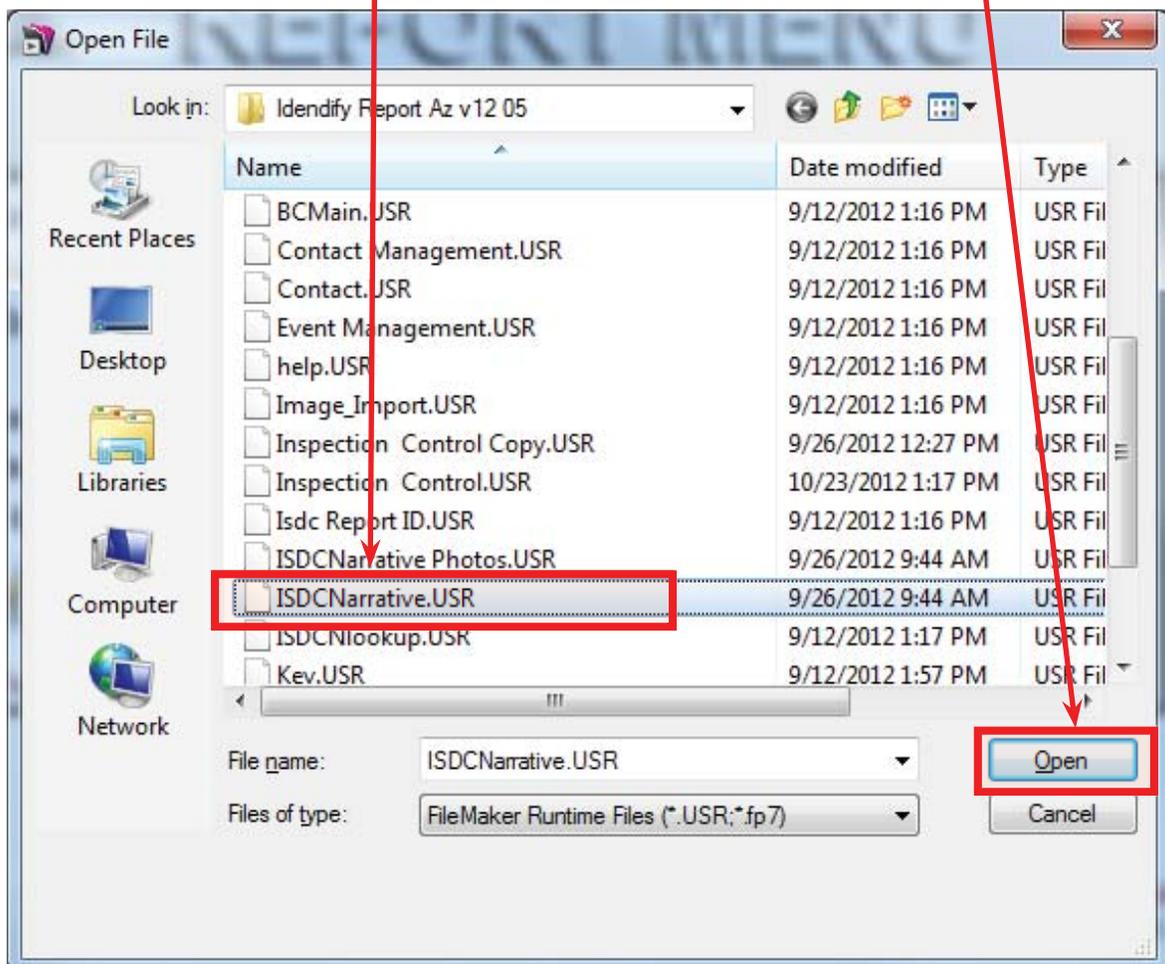
The Open "Key" window opens. Select "Guest Account" radio button.
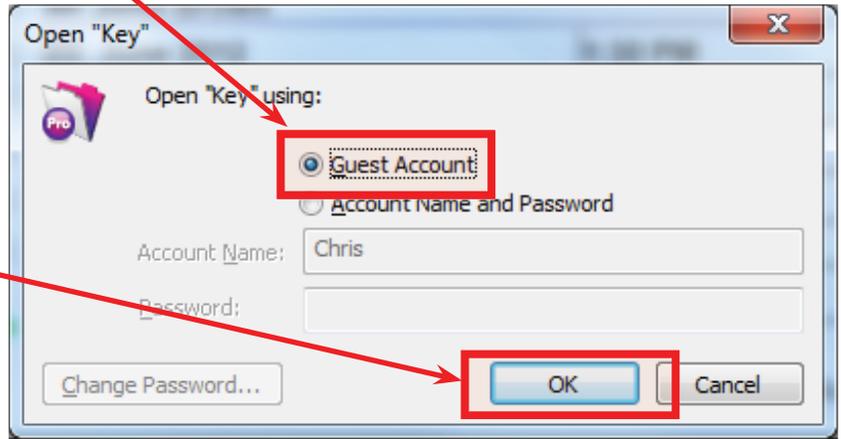
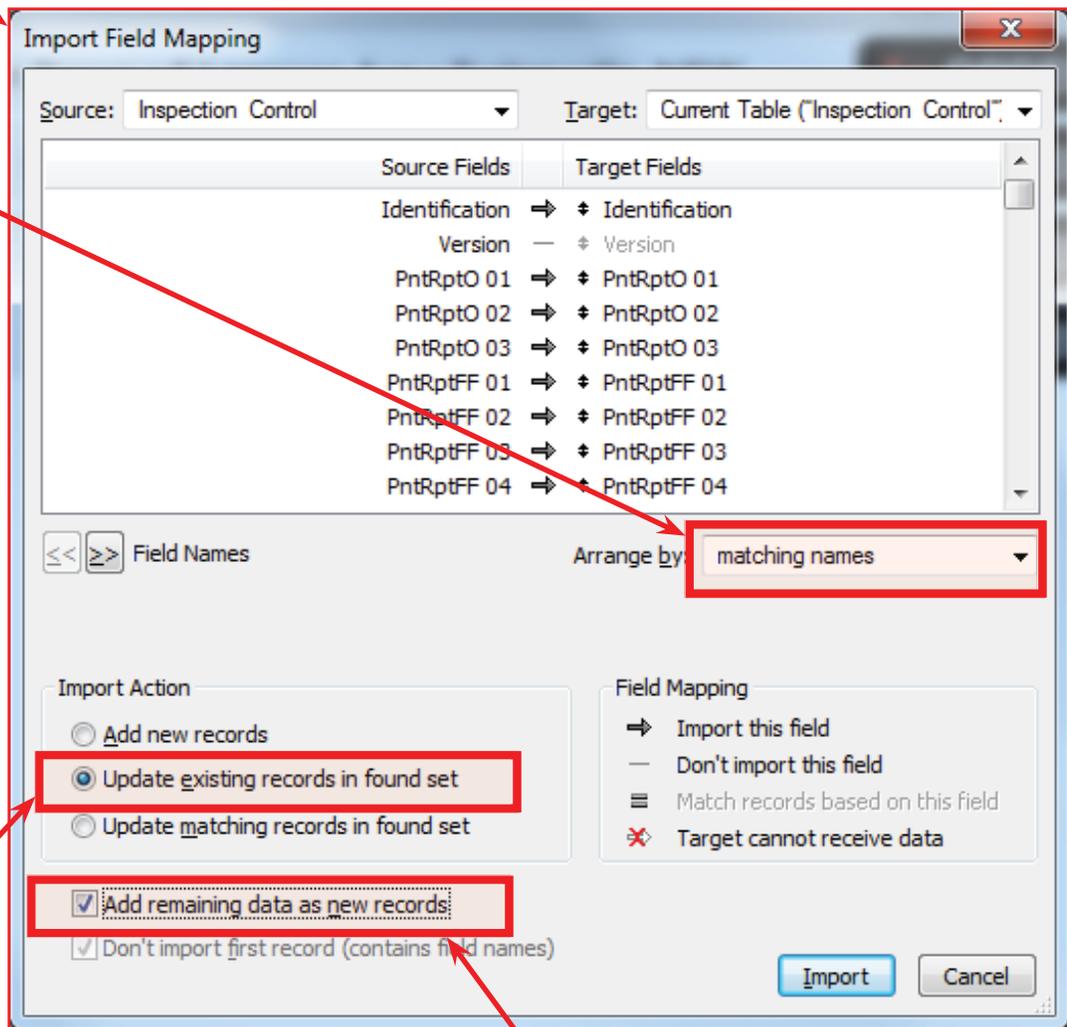Then Click "OK"

The "Import File Mapping" window opens.

There are three very important selections to be made.

1.
"Arrange by:"
"matching names"

2.
In the "Import Action" box check the radio button
"Update existing records in found set"

3.
Check box
"Add remaining data as new records"

"Import Option" window will open.
Make sure the "Perform auto-enter option while importing" box is checked


and
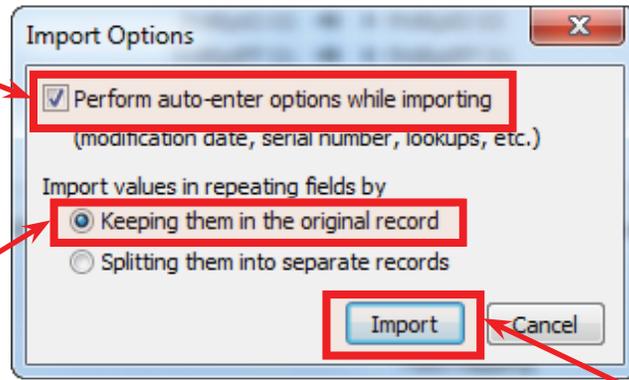
under the "Import values in repeating fields by
Keeping them in the original record" radio button is checked.

Then Select "Import"

The "Import Summary" Window will open. Don't need to do anything just click "OK".
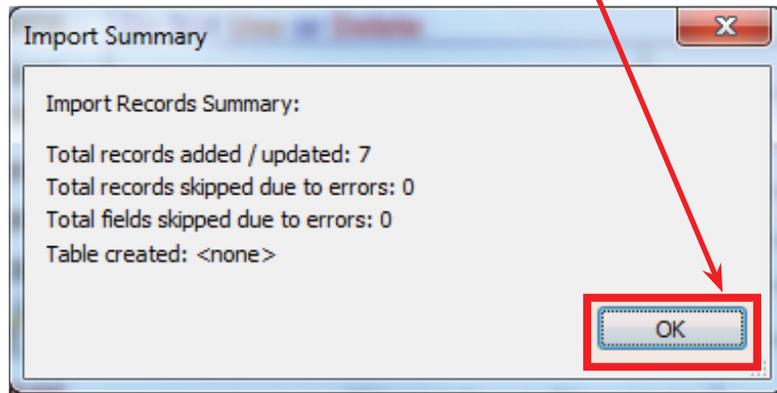
Finely we will import "ISDCNarrative Photos.Usr" from "Identify & Report Professional v12.05i"

Select "PHOTOS" icon
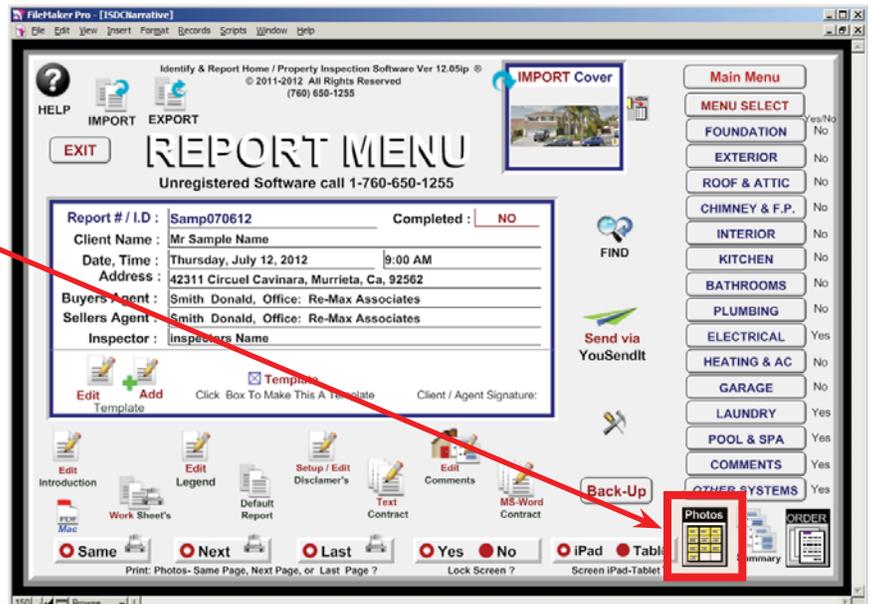
The Photo Library Window opens.
Check to see that you are at [ISDCNarrative]
On the Toolbar select:
File → Import Records → File

Scroll down until you find "ISDCNarrative Photos.Usr" and highlight then click "Open"

The Open "ISDCNarrative Photos" window opens. Select "Guest Account" radio button.

Then Click "OK"

There are three very important selections to be made.

The "Import File Mapping" window opens.

Import Field Mapping

Source: Inspection Control   Target: Current Table ("Inspection Control"

Source Fields		Target Fields
Identification	➡ ↕	Identification
Version	— ↕	Version
PntRptO 01	➡ ↕	PntRptO 01
PntRptO 02	➡ ↕	PntRptO 02
PntRptO 03	➡ ↕	PntRptO 03
PntRptFF 01	➡ ↕	PntRptFF 01
PntRptFF 02	➡ ↕	PntRptFF 02
PntRptFF 03	➡ ↕	PntRptFF 03
PntRptFF 04	➡ ↕	PntRptFF 04

1.
"Arrange by:"
"matching names"

<< >> Field Names   Arrange by: matching names

Import Action
- ◉ Add new records
- ◉ Update existing records in found set
- ◉ Update matching records in found set

☑ Add remaining data as new records
☑ Don't import first record (contains field names)

Field Mapping
- ➡ Import this field
- — Don't import this field
- ≡ Match records based on this field
- ✖ Target cannot receive data

Import   Cancel

2.
In the "Import Action" box check the radio button
"Update existing records in found set"

3.
Check box
"Add remaining data as new records"

"Import Option" window will open.
Make sure the "Perform auto-enter option while importing" box is checked

and

Import Options

☑ Perform auto-enter options while importing
(modification date, serial number, lookups, etc.)

Import values in repeating fields by
- ◉ Keeping them in the original record
- ◉ Splitting them into separate records

Import   Cancel

under the "Import values in repeating fields by
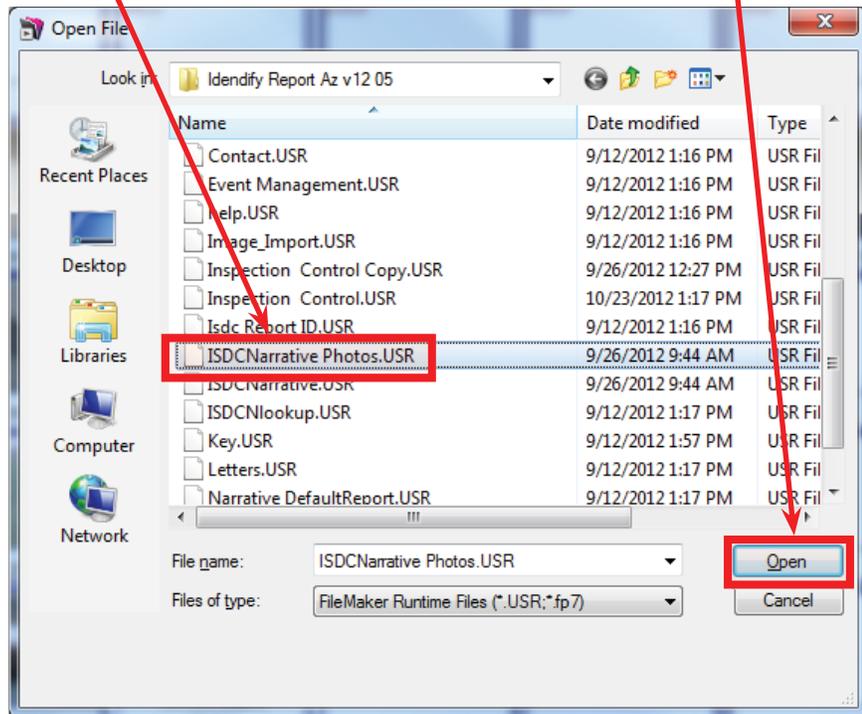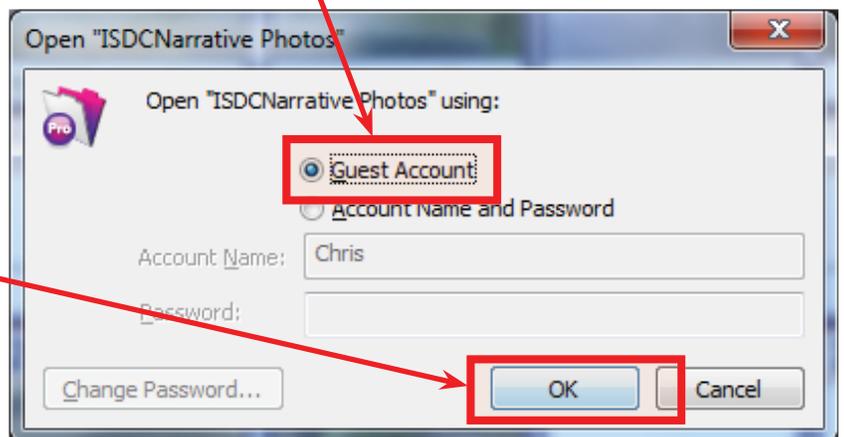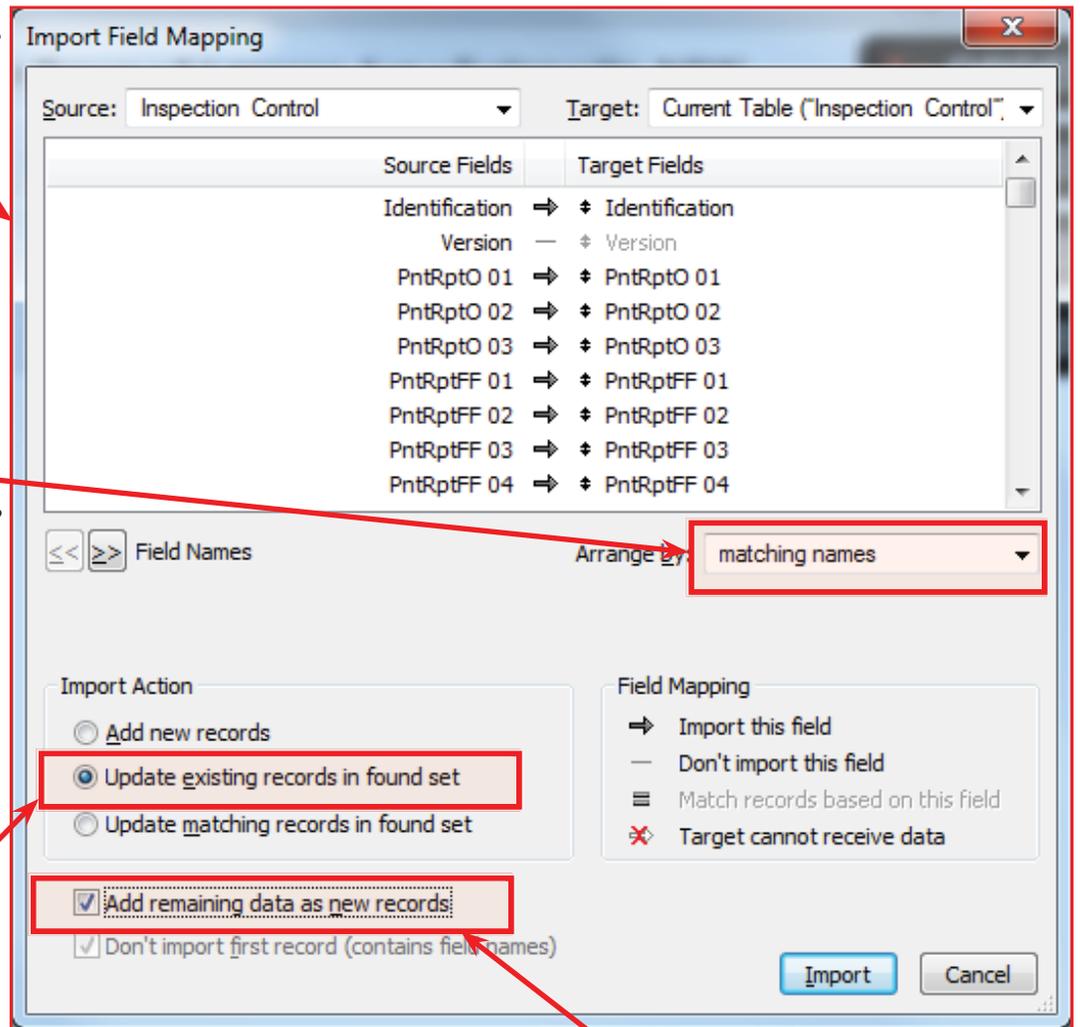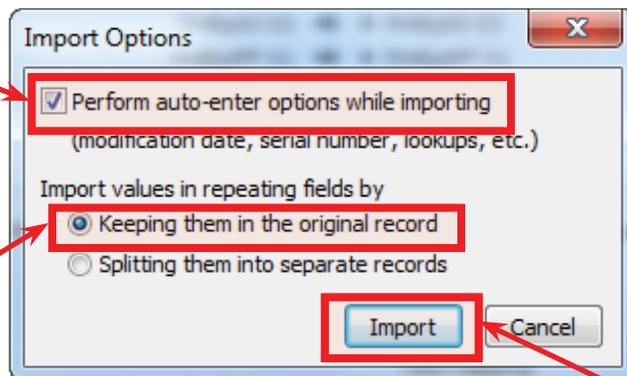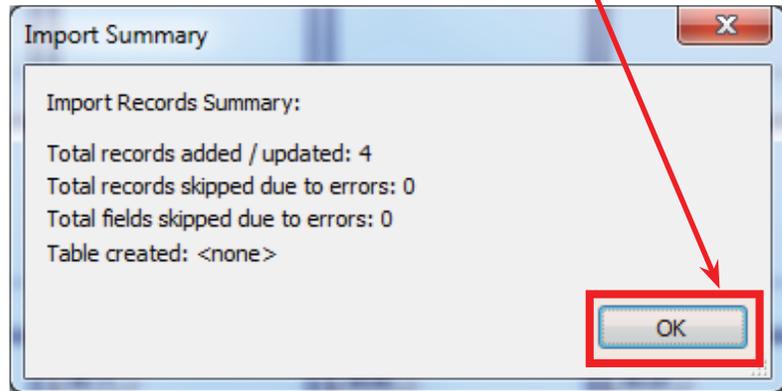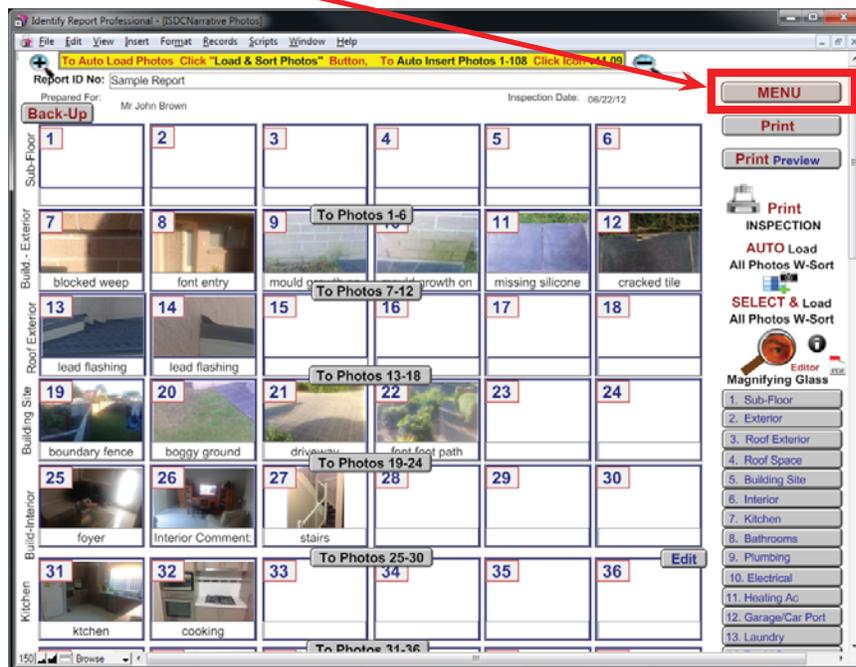Keeping them in the original record" radio button is checked.

Then Select "Import"

The "Import Summary" Window will open. Don't need to do anything just click "OK".
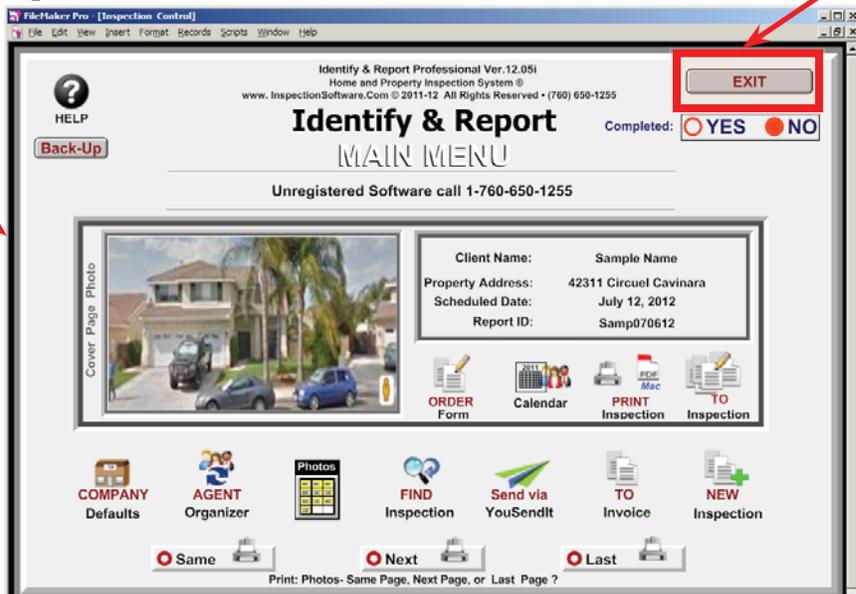

Select "MENU"

The "REPORT MENU" opens

Select "EXIT" to Exit Program

Congratulations
you have "Imported Updates"

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

IF You Have any Questions
Phone: 760.650.1255
or Email:
Support@InspectionSoftware.com