Inspect_It PDF_Keeper

Software for keeping PDFs of periodic detailed inspections generated using Inspect_It PDF_Keeper

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System Requirements

Windows XP, Vista, 7 or, 8 computer
A current version of Adobe Reader
Microsoft Access 2007 (SP2) or higher; provided in install package if needed.

Installation of Inspect_It PDF_Keeper

1. Download Inspect_It PDF_Keeper from www.NorthWesternMachinery.com.
    a. It may be necessary to tell your virus protection to trust this download, or turn off the virus protection until the file has downloaded and then turn it back on.
2. Click on the setup program to begin the installation
3. If you already have Microsoft Access 2007 (SP2) or Access 2010, select the option "Access 2007/2010 is already installed"
    a. All Microsoft updates need to be applied to your version of Access 2007/2010
4. Pick one of the following:
    a. "install free Access 2007 Runtime" - If you don't have any Office 2007/2010 products installed (i.e. Word, Excel…) you <u>must</u> choose this option. If you have at least one Office 2007 product installed, but not Access 2007, then choose this option.
    b. "Access 2007 already installed" -   If Access 2007 was installed when you install the other office products, Choose this option.
    c. "Access 2010 already installed" - If Access 2010 was installed when you installed the other office products, choose this option. If you have any office 2010 products installed but not Access 2010 choose this option. After the install, install the free Access 2010 Runtime before attempting to run PSD_Keeper.
5. Click install
6. At the end of the installation of Inspect_It PDF_Keeper the following support programs get installed
    a. Access Runtime 2007 (If you chose to use it)
    b. Microsoft Office PDF & XPS add-on (for office 2007)
7. Click finished after programs have installed.

Main Menu

Select Type of Inspection

- This box contains a list of each type of inspections in your database
- Click any checklist/inspection name to show all inspections of this type in the inspections box

Sort Selected Inspections

- The inspections showing in the inspection box can be sorted by any of the 5 pre-selected categories
- Date (Descending) – most recent inspections are at the top
- User Name – User Name, Manufacturer, Model, Date (Descending)
- Manufacturer - Manufacturer, Model, Date (Descending)
- Model - Model, Date (Descending)
- Serial No. – Serial No, Date (Descending)
- Note: you can use filter by and sort by together to view the inspections in numerous ways

Filter Inspections

- The inspections showing in the inspection box can be filtered by any of the 6 pre-selected categories plus remove filter. After selecting one of the 6 categories, start typing in the "filter Inspections by" box (that appears in the lower right) until you see what you want filtered then click the item in the lower box. For example, if you

want all TEREX cranes, click manufacturer, and start typing TEREX. When you see TEREX in the box just below where you are typing, click TEREX. The inspections box will contain only TEREX cranes.

- Remove Filter – to remove a filter setting and show all completed inspections for a particular checklist
- Date – in order for the dates to sort correctly, they are formatted YYYY/MM/DD. If you want all the dates in October, for example, type /10/. Listed are all October inspections for any year and day.
- Most Current Only – show only the latest, most current inspection available for each piece of equipment by serial number.
- User Name – User Name, sorted by whatever is selected in sort by
- Manufacturer - Manufacturer, sorted by whatever is selected in sort by
- Model - Model, sorted by whatever is selected in sort by
- Serial No. – Serial No, sorted by whatever is selected in sort by
- Note: you can use filter by and sort by together to view the inspections in numerous ways

View the PDF for an Existing Inspection

- The inspections box lists all the inspections in the database for the type clicked in the Type of Inspection box.
- Click any inspection and the PDF of the complete inspection opens. A copy is also send to C:\Users\Documents\Inspect_It_Keeper\PDFs in case it needs to be used for an attachment or other purpose.

Settings

- General comment: a hyphen ' is used to denote comments. Any text following the hyphen ' is ignored.
- Line1: Company Name: Enter your company name as you wish it to on the main menu.
- Line2: Address: Enter your street address
- Line3: City, St, Zip: Enter your City, State and Zip
- Line4: Phone: Enter your phone number.
- Line5: # Days Notification: Enter number of days prior to an annual inspection's due date you wish to be notified.
- Line6: Run Due Report On Open: if you want the due report run each time you open Inspect_It PDF_Keeper then enter Yes otherwise No. This is the same report given when you press "Inspection Due" button on the main menu.
- Line7: Looks For Imports On Open: If you want to check for imports each time you open Inspect_It PDF_Keeper then enter Yes otherwise No. This is the same as pressing the "New PDFs/Inspections" button on the main menu, except you will not be prompted for new locations.
- Line8: Most Current Only: If you want the default view of inspections to be just the most current, and not every inspections (past and present), then enter Yes otherwise No. This is the same as pressing "Most Current Only" in the filter by box.
- Line9: Search More Folders : PDF_Keeper searches Outlook (see line 11), downloads, Desktop, and My Documents for new PDFs/Inspections by default. If you prefer to use a different folder, then place a yes here to be prompted for new locations. After a new PDF/Inspection has been found in a different location, the folder will be remembered and searched again in the future. You can change line 11 back to No whenever all folder locations used to store new PDFs/Inspections have been used.
- Line10: PCName: Place a 1 to 5 character name for your PC here, if you do not like the one assigned. The field is not used at this time.
- Line11: Look In Outlook: Inter Yes or No depending on if you want your outlook inbox searched for inspections with PDFs for keeper to import (see "Search Outlook Inbox" below for more details)
- Line12: Inbox Folder Name: If you answered yes to line 11, then PDF_Keeper needs to know the folder name your Outlook inbox is in. For IMAP a name is needed; for POP3 leave blank. (see "Search Outlook Inbox" below for more details)
- Line13: Not Used at this time
- Line14: Not Used at this time

- Line15: Not Used at this time

Inspections Due
- Using the information in line 5, the inspection due reports runs and shows on screen. Press "print to default printer to send to the printer, or ctrl-p to send to a different printer.
- Should there be any load tests in Inspect_It PDF_Keeper, they are ignored.

New PDFs / InspectionsAdd
- Inspections added to Inspect_It PDF_Keeper are generated using another program, Inspect_It version 4.44 or higher. See www.northwesternmachinery.com to purchase a copy of this program.
- All imported files will end with .7z
- Do not attempt to rename any 7z files.
- All 7z files will be deleted after import.
- PDF_Keeper looks in Outlook (see "Search Outlook Inbox"), downloads, desktop and my documents for the 7z files. If none can be found, it assumes they must be in a different folder and prompts for this folder name. If 7z files are found, this folder is remembered and will be searched again in the future without prompting.
- If multiple 7z files are in multiple locations, they all will be found and imported and new locations will not be asked for. Click "New PDFs/Inspections" again and the prompt will appear if 7z files are in other folders.
- If an inspection is being imported into PDF_Keeper and it already exists, it is assumed the new one being imported has more current information and the old one is replaced with the new one.

Search Outlook Inbox for Inspections with PDFs
PDF_Keeper is capable of searching, downloading and processing attachments in emails without the bother of downloading them and saving them. PDF_Keeper will do this for you. However, there are a few settings that must be made before it will work.

- Works with Outlook 2010 and 2007. Examples are for 2010.
- Only unread email will be searched
- Only attachments ending in ".7z" will be processed
- If there are multiple emails to process, each attachment file name must be unique. If some of the file names are the same, duplicates will be ignored and some of the inspections will not get imported.
- Click "Settings" (do this once)
  - Lines 11 must be set to Yes
  - Line 12 is the outlook IMAP folder name with Inbox underneath. If this is a POP3 account the default inbox is searched. In this case, leave the outlook folder name blank.
  - You may want to make a few other changes to Outlook so attachments are processed smoothly. See Changes to Outlook Settings below. If you are using POP3 these changes are not necessary.
  - If you choose not to change settings…
    - open the email with the attachments to make sure the attachments are downloaded to the PC
    - Click mark as unread. PDF_Keeper only looks at unread emails
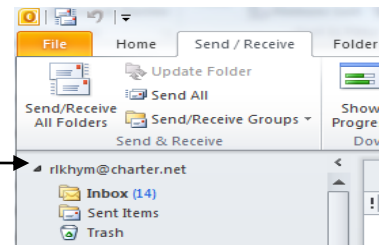
Delete Unwanted Inspections
- Inspections are deleted by selection an inspection number from the Delete Inspection pull down box. In the event there are multiple inspections for the same equipment (Serial Number) you will be prompted:
  - Yes – deletes all inspections with given serial number
  - No – deletes just the inspection with the inspection number selected
  - Cancel – does not delete anything

- Use this option to delete test data
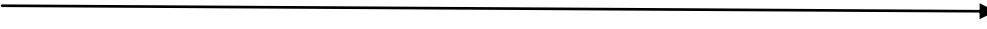
Changes to Outlook Settings

When Outlook gets an email with attachments, the attachments are not always downloaded right away. If you open the email, the attachments are downloaded, but now the email is marked as read. Remember, PDF_Keeper only processes unread emails. The email will need to be marked as unread before PDF_Keeper will process the attachments. To get the attachments downloaded without being marked as read, the "Send/Receive" settings need to be changed by doing the following once:

- Open Outlook and click the Send/Receive tab
- Click Send/Receive Groups
- Choose Define Send/Receive Groups
- The following screen opens
- Make sure All Accounts is highlighted
- Click Edit…
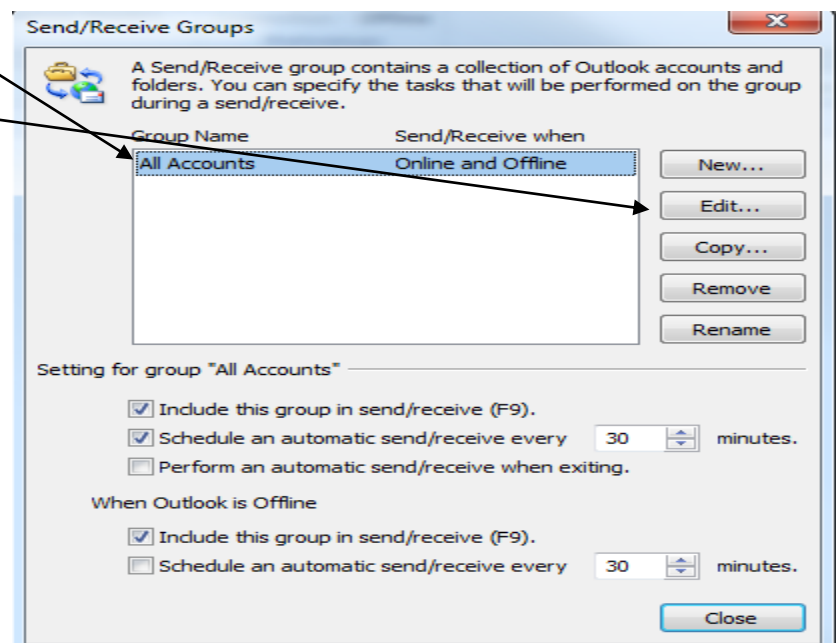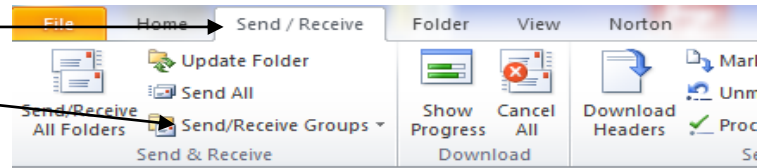
- Click custom behavior defined below
- Click Inbox

- Click Download Complete item including attachment
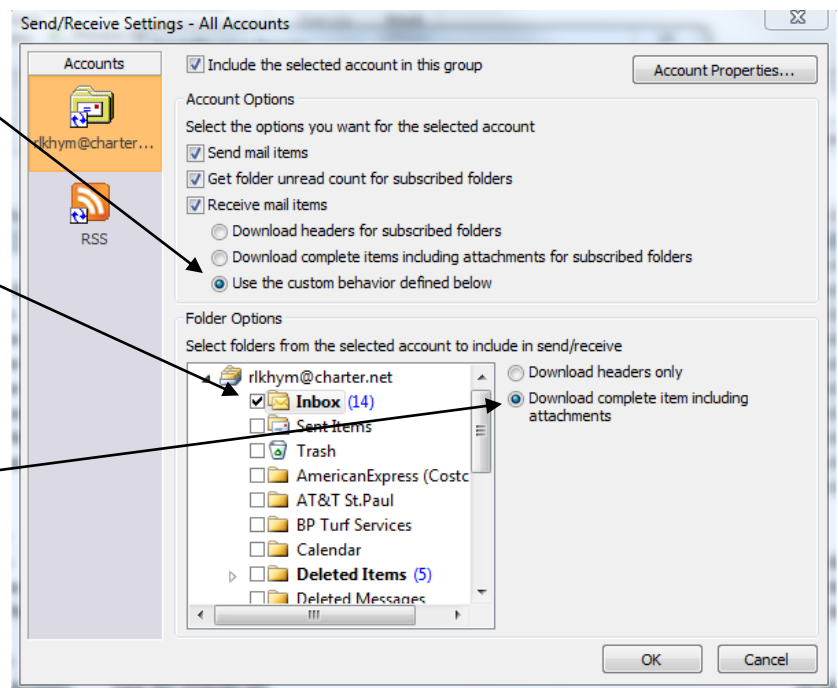
- Click OK

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