

GET STARTED USING CUSTOM FORM STUDIO

This guided tour introduces you to Custom Form Studio features. See also full documentation in the HelpDesk for more details about Custom Form Studio and other areas of the software.

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The Custom Form Studio builds your form groups and standard inspection comments for the Report Writer and Phone3D. You can create and customize forms for different types of inspections or needs. In most cases, you can easily streamline or modify 3D forms that came with your software or from other vendors, adjusting wording, permanently adding and removing items, or changing the order of items. Note: Certain editions of 3D software may not include advanced Custom Form Studio features or the Draw Graphical Forms utility.

Custom Form Studio primarily customizes “contents” or form wording, including the order and labels for inspection items and their comments.

LAUNCH CUSTOM FORM STUDIO

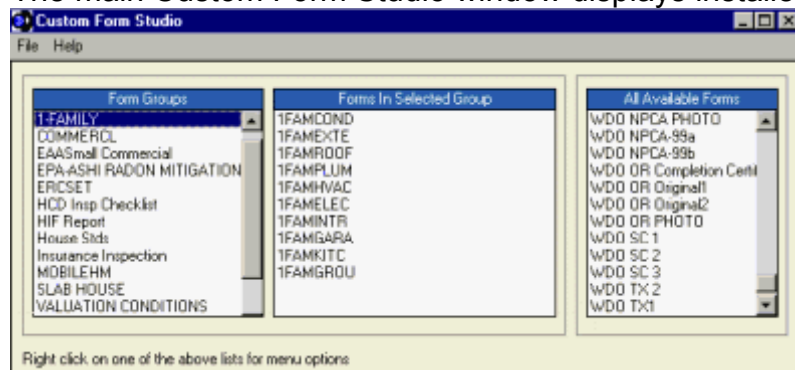
This guide tours main Custom Form Studio features so you'll be ready to start customizing your own forms. More details about various features covered herein and advanced features can be found in the regular Custom Form Studio documentation.

Let's open the Custom Form Studio: Switch to the Report Writer, and then click File > Custom Form Studio.

Note: You may also right-click within any field of an open inspection to quickly launch a Customize Inspection Content window for that particular form.

ABOUT FORM GROUPS

The main Custom Form Studio window displays installed form groups and forms:



Form Groups are actually arrangements of several forms (up to 28) joined together for final inspections. Individual forms usually cover single components such as Electrical, Plumbing, or Roofing, which are then joined together in a group to create final inspections. This makes it easy to create different groups that share some of the same form sections. For example, the same Roof form might be used in both a single-family and multi-unit form group, whereas other forms in those groups may be different.

On the main window, Form Group names are listed in the left column. Click a Form Group to view the Forms In Selected Group, or its main sections, in the center column.

We'll use the "Residential Checkstyle" forms as an example. Note: If these forms are not included in your edition, you may examine another one that is included instead. If you modified your forms or use other forms, different inspection items may display, but the features work the same.

Click one of your Form Groups. This example shows how Residential Checkstyle might display its Forms in Selected Group:

Form Groups	Forms In Selected Group
Residential Checkstyle	RESIDENTIAL GENERAL
Residential Detailed Narrative	RESIDENTIAL GROU
TEXAS 05 (B) ENHANCED	RESIDENTIAL EXTE
Xtra Forms	RESIDENTIAL BASEMENT
	RESIDENTIAL ROOF
	RESIDENTIAL ELEC
	RESIDENTIAL HVAC
	RESIDENTIAL PLUM
	RESIDENTIAL KITC
	RESIDENTIAL BATH
	RESIDENTIAL INTR
	RESIDENTIAL LAUNDRY
	RESIDENTIAL GARA

Forms in Selected Group are the individual form sections that make up the selected group. Click other Form Groups to see their Forms in Selected Group. Forms in Selected Groups shows the actual user-defined filenames on your hard drive containing the form data, often named based on its contents. When creating new forms, use easily identifiable filenames. The filenames themselves are not printed. The printed Form Description name is actually specified within the form file, as we'll see.

REARRANGE THE FORMS IN A GROUP

The order of forms in the Report Writer and on final inspection printouts is determined by the order of Forms In Selected Group. Each form in the group has a form button at the top of the Report Writer when an inspection is open.

CHANGE THE ORDER OF FORMS

Changing this order is easy. When the desired Forms in Selected Group are shown, just click and drag the desired form to a new position in the group. *For example, click Residential Checkstyle group to display its forms. Next click on RESIDENTIAL KITC, and click and drag it upward to another place in the group, releasing the pointer at the new position. You can rearrange any form in a group the same way. Unless you want the Kitchen form to remain repositioned, right-click and Undo Changes to Group immediately to restore the original order. Or drag to reposition as desired. (Note: Once you select/highlight another group, Undo is no longer available)*

REMOVE UNUSED FORMS

Removing a form from the group is easy. Just right-click the desired Form in Selected Group and choose Remove. Removing a form from the group does not delete the form file itself, but merely removes it from the current group. Note: If you try this, and don't really want to remove the form from the group, right-click and Undo Changes to Group immediately to abort.

ADD NEW FORMS

Adding an existing form to your group is also easy. A complete list of all Available Forms is shown in the right column. Available forms may be included or mixed and matched in any groups as desired. To add one to your current group, click and drag the desired Available Form into your group, where it will be added to the bottom. Afterward,

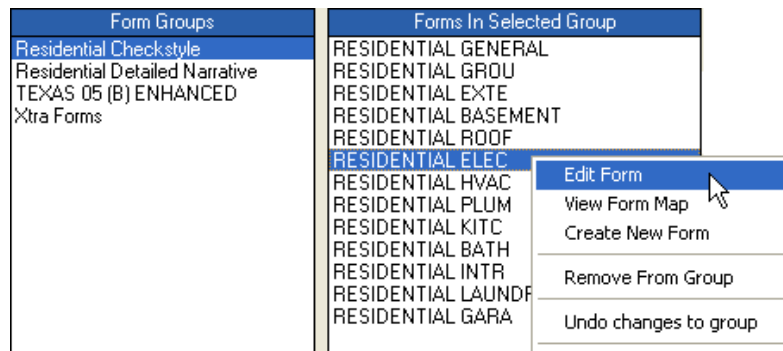
click and drag to reposition it. Note: If you try this, and don't really want to add the form, right-click and Undo Changes to Group immediately to abort, or right-click and remove the item.

You can also create a brand new form by right-clicking and choosing Create New Form. Once you have assigned a filename, an editing screen appears to add form contents. Later, we will discuss the editing screen and how to use its features.

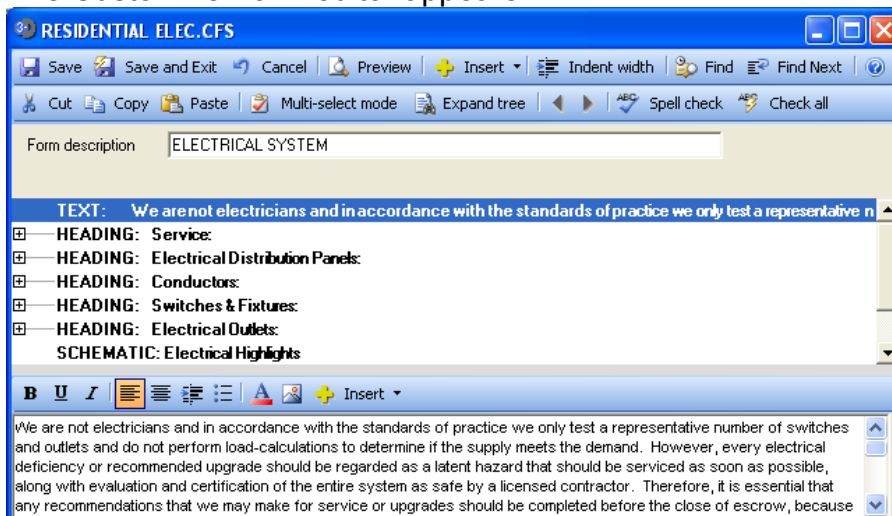
After rearranging the order of your forms, you must Compile them to update the Report Writer. To do so, right-click the group name and choose Compile. On the Compile window, just click Compile. For details on additional options that are available, click Help. When a group successfully compiles, new inspections created in the Report Writer will use your latest compiled changes. However, existing inspections are not affected by changes.

CUSTOMIZE FORM CONTENTS

Now, let's edit the contents of a form. From the main Custom Form Studio window, click Residential Checkstyle to display its forms. Let's examine the Electrical form. *In Forms in Selected Group, right-click RESIDENTIAL ELEC and choose Edit Form:*



The Customize Form editor appears:



The customize form editor is where you change the “contents” of a form, including the printed Form Description (name), Headings and Subheadings (main and sub categories), Narratives (standard comments), and other elements in the form structure. When first opened, only form main level items are shown, which may be expanded and collapsed as needed to view underlying items.

Note the lower pane always shows the item currently highlighted or selected with the cursor bar. This is where content changes are made, as we’ll see later.

FORM DESCRIPTION (PRINTED TITLE)

Notice the “Form Description” field near the top of the window. This is the actual title printed for this form in your group. Adjust the label as desired.

ABOUT FORM ITEMS

Notice that Headings and other form items are organized in the same order as in Report Writer. Some items are nested within main level items. Use the plus marks in the tree to see underlying level items. Expanded items can be collapsed, so you only view what you need at a time.

To see all items in the form at once, click the “Expand Tree” button in the toolbar. Do that now.

Form description: ELECTRICAL SYSTEM

TEXT: We are not electricians and in accordance with the standards of practice we only test a representative number of switches and...

- HEADING: Service
 - SUBHEADING: Type & Condition:
 - Narrative 1: [Overhead] Overhead
 - Narrative 1: [Underground] Underground
 - Narrative 1: [110] 110 Volt
 - Narrative 1: [110/220] 110/220 Volt
 - Narrative 1: [Breakers] Circuit breakers
 - Narrative 1: [Fuses] Fuses
 - Narrative 2: [Fuses Missing] Some fuses are missing
 - Narrative 1: [OK] Appears serviceable
 - Narrative 1: [Damage Noted] Damage/Defects noted:
 - Narrative 2: [Loose] Loose/Damaged connections at masthead
 - Narrative 2: [OVERHEAD are ...] Overhead conductors are []
 - Narrative 3: [TooClose] too close to ground (should be 10' off ground)
 - Narrative 3: [TreeLimbs] are contacting tree limbs. Have the power company trim as needed.
 - Narrative 3: [OH-Replace] are deteriorated or frayed and need replacement by the power company.
 - SUBHEADING: Grounding Equipment:
 - Narrative 1: [Grounding provided by ...] Grounding provided by []
 - Narrative 2: [Plumbing/Rod] both the plumbing and rod in the ground.
 - Narrative 2: [Water Pipe] connection to metallic water pipe.
 - Narrative 1: [Loose] Ground clamp is loose at the water line or ground rod
 - Narrative 1: [Cable Missing] Ground rod has no grounding cable attached.
 - Narrative 1: [No Ground Rod] Ground rod was not located. Further evaluation needed to determine location and condition of ground r
 - Narrative 1: [CALL ELECTRICIAN] A licensed electrician should be called to re-establish all proper grounding to the house.
- HEADING: Electrical Distribution Panels
 - SUBHEADING: Main Panel Location:
 - Narrative 1: [Basement] Basement

The various items were originally added using the Insert menu in the toolbar.

Here's a brief description of main form items:

Headings are labels of main form sections, just as several forms create a form group.

Subheadings are further divisions of a Heading. Each subheading has a comment field in the Report Writer. Multiple subheadings may be used under each heading.

Narrative 1, 2, 3 items are prewritten comments available, listed below the subheading to which they apply. In the Report Writer, Narratives are selected from the side menu. Narrative 2 and 3 items are available only after their higher level Narrative is selected. For efficiency and to avoid scrolling through a long list of narratives, it may be a good idea to split subheadings with lots of narratives into smaller ones. For example, a "Type and Condition" subheading might be split into separate "Type" and "Condition" subheadings to make completing inspections faster.

Highlight any narrative in your open form, and view its properties in the lower pane. The "Abbreviation" displays for quick selection in Report Writer and PDA menus. Use an abbreviation that tells you what the comment is about. Abbreviations are not printed; only the full "Narrative Text" comment imports into inspections.

You may set certain comments be pre-selected for new inspections by ticking "Default" in the narrative Properties. Use this for items that usually apply to all jobs. Also, comments may be pre-set to mark the inspection field for "summary" when selected. You may also include "Images" that automatically import with your comment. See program Help, and the FAQ section of this guide for further details.

Text items are standard text or images that ALWAYS automatically print on every inspection where specified. Use this type of item for disclaimers, definitions, general information, or other text that always applies to EVERY inspection. Text items do not display in the Report Writer, nor can they be modified once an inspection is created. Text items always appear when you preview or print inspections, if their form was used.

Schematics or Diagrams indicate a location and label for an optional sketch area.

These are the most frequently used form items. Help documentation has more information about these and other form items that may be Inserted and their options.

CHANGE ITEM WORDING

Changing a form item label, comment, or other property is easy. Just locate and select (highlight) the item you want to change in the form tree and then edit its Properties in the lower pane.

For example, to change the automatic Text wording that prints at the top of the Electrical form, highlight the Text item in the upper portion, then use the lower pane to

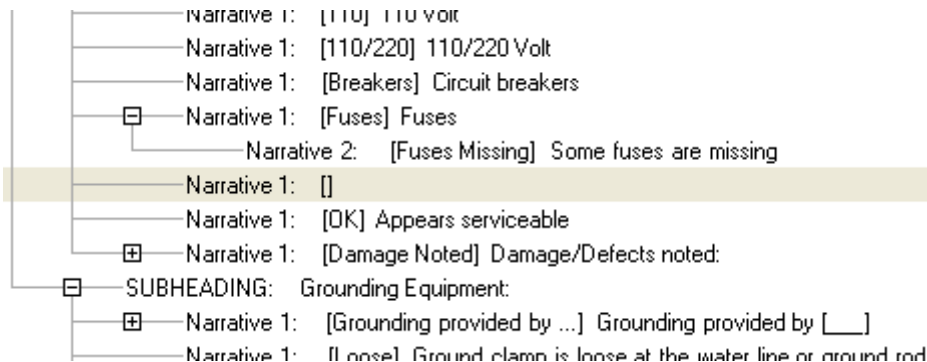
edit the full text shown. To change a heading label, such as the Heading “Service” to “Main Service” or some other label, simply click the item and make your change in the lower Properties pane. The same is true for Narrative and other form items in the tree. For instance, to change the Narrative 1 labeled “[OH] Overhead” to a longer comment or adjust its abbreviation, simply highlight it and changes its Properties below. Go ahead and practice making changes here and there. It’s OK if you don’t want to keep them, as we will simply choose not to save when we exit.

However, saving changes when editing a form does not immediately update them in Report Writer until they are Compiled, which we’ll review later. First, let’s learn about other form customize features.

ADD NEW ITEMS

You may easily add new items, such as narrative comments or headings or subheading to your forms. As a rule of thumb, whenever you add or paste items into the form tree, always place your cursor bar directly BELOW where you want the items to import. Items always import right ABOVE the cursor bar location. It doesn’t matter if the item you highlight is another narrative, heading, subheading, text item, or other item, as long as the new item you add will fit properly in the tree structure.

Let’s add a new narrative to the “Service”, “Type & Condition” section (if you renamed these categories, select comparable ones). Type and Condition has narratives for Circuit Breakers and Fuses. Let’s add a new combined “Circuit Breakers and Fuses” item. If we want the item to be located beneath “Fuses” and its sub level items, we must highlight the item directly below them. Therefore, highlight the narrative “[OK] Appears Serviceable” and then click Insert > Narrative 1 to add that type of item. A new blank Narrative 1 appears between Fuses and OK:



Your new item properties are displayed in the lower pane, ready for entry. Add an Abbreviation (Break&Fuse) and Narrative Text (perhaps “Breakers and Fuses”, or “Both breakers and fuses are present”) and then click back to the tree at the top when finished. See how easy this is? You may want to practice adding other types of items to your form the same way (positioning your cursor and clicking Insert) since we are not planning to save this edit session.

CUT, COPY, AND PASTE ITEMS

Delete, move, or replicate items using Cut, Copy, and Paste tools. First highlight the desired item. If the item has sub-levels or a plus mark, all lower level items are included also. Your last item cut or copied is saved to a clipboard. Afterward, to move the items to a new location, relocate your cursor and click Paste to insert them above your cursor position.

For now, let's cut the item we just added. Click the [Break&Fuse] Narrative 1 we added in the previous step to select it and then click Cut to remove it. If you'd like, you can re-position your cursor elsewhere and click Paste.

Since we are already editing the Electrical form, for the sake of practice, let's copy the "[OH] Overhead" narrative from the Service "Type & Condition" subheading to "Grounding Equipment". First highlight the [OH] item and then click Copy. Next locate the "Grounding Equipment" subheading. Remember items always insert "above" the cursor bar position. Let's make it the first item under that subheading. So highlight the [Plum/Rod] narrative just below the area we want to insert and then click Paste. The program pastes the clipboard contents above our cursor bar.

Now, let's copy the entire "Grounding Equipment" subheading and its sub-level items to a new location. Highlight the "Grounding Equipment" subheading and Copy. Let's replicate it to just below the next "Electrical Distribution Panels" heading. Remember we must highlight just below where we want items to paste, so highlight the first "Main Panel" subheading. Now Paste and see how the entire "Grounding Equipment" subheading and its narratives are added.



TIPS:

- To work with several same level items at once, toggle on Multi-select mode. Tick boxes let you select multiple items to cut or copy. Click Multi-select to turn it on/off as desired.
- To remove a higher level item without removing the sub level items beneath (i.e. eliminate a Heading label, but keep its subheadings and narratives, first turn on Multi-select mode and select all underlying items. Cut the items, and then Paste them to a new location, perhaps above the main item you wish to eliminate. Once underlying items have been moved, you can safely Cut the original main level item that is now by itself.
- You can also use Copy and Paste to move specific text "within" an item's Properties, or from one item's Properties to another. The program keeps separate clipboards for moving tree items verses editing within the lower properties area of items, although the same Edit options are used for both areas.

We don't want to save our practice changes, so let's exit without saving. Click Cancel. That way the form remain unchanged from the last time it was saved.

You can abort changes this way if you edit in error. To keep changes, you'd choose Save and Exit. As you edit forms you may also want to periodically use Save to update changes and continue working, especially when doing a lot of work.

USING & EDITING SUBFORMS

A great way to replicate identical form sections is using Subforms. This feature is ideal for duplicating or sharing larger sections amongst various forms, or to repeat an entire form an additional time in the same group.

Insert > Subform is used to add or select new subform sections in a form. Subforms import their data into your main form at the location specified when the group is compiled. Whenever the contents of the subform changes, it updates all areas where it is used when those forms are compiled. To edit the contents of an existing subform, highlight the subform and click the Edit button in the lower pane properties.



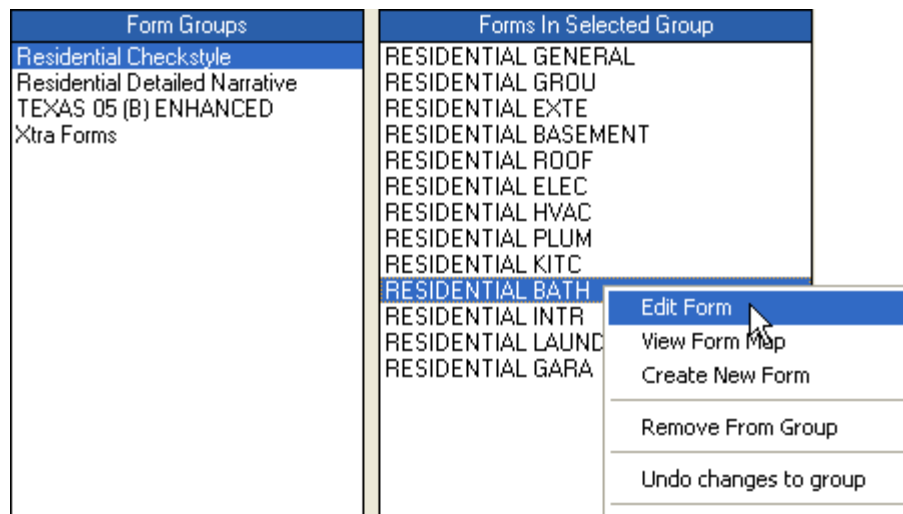
TIPS:

- ◆ Keep in mind that you also can copy headings or subheadings on the fly in the Report Writer or Phone3D to replicate components, so we recommend including only the minimal number of items you are likely to encounter during an inspection, whether repeated using subforms or Copy and Paste.
- ◆ If you want to copy a section and then modify it for a similar but different component, use Copy and Paste to create an independent section. However, if the replicated items should always match everywhere they are used, use a subform. Subform items are always edited from the original subform file itself, and simply import their information into form areas where used, automatically updating all areas at once at compile time.
- ◆ If the items to replicate are already in your main form, and you want to convert the section into a subform, you might Cut them from the main form, then Insert a new subform, and Paste them there.

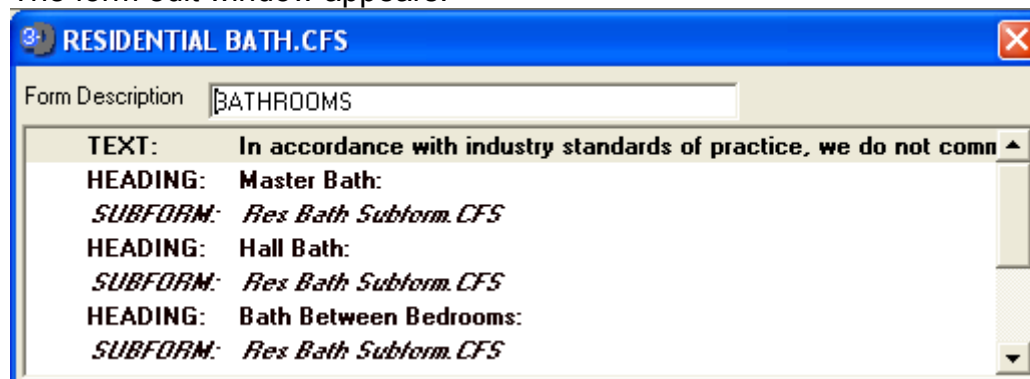
Subform Example

Let's consider an example of subform usage. In the Residential Checkstyle Group, several forms use subforms to replicate individual interior areas. For example, the Bathrooms form uses them to repeat individual bathroom sections, since the same items apply to each bathroom. Rather than Copy the bath areas, a Subform was used. An advantage is that changes made to the subform automatically will affect ALL areas where it was used (i.e. all bathrooms), since it's sharing the same subform data.

Let's examine the design. From the main Custom Form Studio window, click Residential Checkstyle to display the Forms in Selected Group. To examine the main bathroom form, right click the RESIDENTIAL BATH form and Edit Form:



The form edit window appears:



Do you notice anything unusual about this form? Instead of subheadings and narratives listed under the headings for each bathroom area, only “Subform: Res Bath Subform.CFS” items are listed. This means that the contents of that separate form file gets pulled into this main form in the respective “Subform” locations when the forms are compiled for use. Since the same subform is imported multiple times, the same Res Bath Subform.CFS form contents are repeated and shared in each location.

To edit the contents of a Subform, highlight the item and click the Edit button in the lower pane.

Let's do that now. Highlight one of the Subforms clicked, and click the Edit button in the lower pane.



Note the subform **ONLY** contains several subheadings to cover the various bathroom component. No heading is needed in this subform because it is imported into a main form under appropriate Headings. You may Expand items here to see narratives beneath them as desired. Since this subform is imported after each bathroom area heading in the main Residential Bath form, this means that all these subheadings and their contents gets replicated in every location where this file is included as a subform.

The form description in a file imported as a subform (“Single Bathroom”) is ignored at import time, since only the form tree contents “inside” this file is imported into the other main form. The other main form has its own Form Description that is used for that entire form section, regardless of what subforms or other items are present within it. Any changes made to subform contents will affect all areas where the file is used as a subform when forms are compiled. We learn about compiling next.

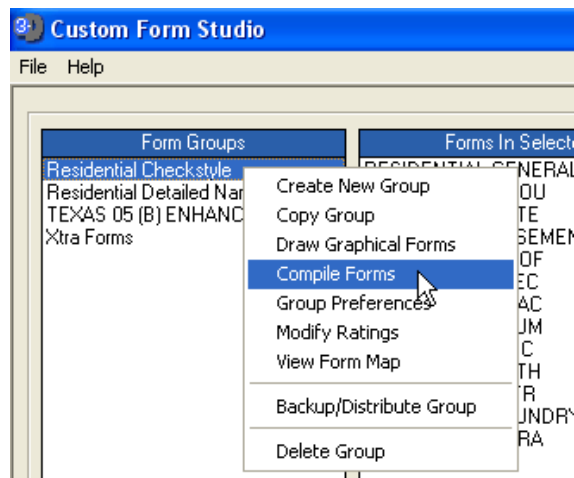
When done viewing the contents of the subform, click Cancel to exit the form and return to the prior window.

Let’s Cancel out of the main bathroom form as well. Click Cancel to return to the main Custom Form Studio window.

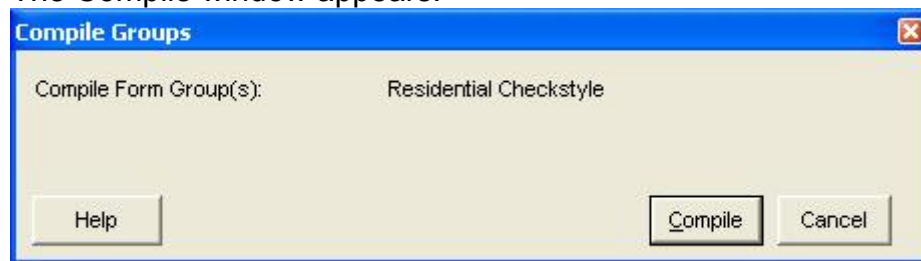
UPDATE OR COMPILE FORM CHANGES

Changes you make and save in Custom Form Studio don’t come into use for new inspections until you “Compile” them. When you compile a form group, all changes made throughout all the forms and subforms used by that group are updated together.

Let’s compile the Residential Checkstyle forms now. Right-click the Residential Checkstyle group and choose Compile. If any forms you changed or updated are used or shared by other Form Groups, you’d need to compile those groups separately in order to update them. (For information about other group functions or settings such as Ratings and Preferences, see Custom Form Studio Help documentation.)



The Compile window appears.



To just update your form group for the Report Writer, click Compile.

Click Compile and a status log displays as it works.

Each form and subform CFS file is listed as it compiles. When complete, the log lists form statistics and should indicate “Form was compressed to ??% of original size”. If so, then your forms have been successfully updated for new Report Writer inspections you create. Any existing inspections are not affected by new changes compiled into the forms. This protects existing inspections from being modified after delivery to the client.

If you get the message “Errors were detected” at the bottom of the log, then the forms were not updated because of something invalid in your form structure. Use the scroll bar to view the error(s), which are listed in the location where they occur. Write down the CFS files above the errors and the errors listed, and see Help for instructions on correcting them.

Click Exit when done.

Of course, since we didn’t save any practice changes made during this tour, you likely won’t notice any differences in new inspections at this point. But you are now ready to start making your own custom form changes and compiling them for actual use.

Although you can get started right away, you will find additional valuable tips by reviewing the remainder of this guide. Further comprehensive information about all Custom Form Studio features can also be found in the HelpDesk.

FAQS AND OTHER USEFUL TIPS

How Do I Copy Existing Forms?

It depends on whether you simply want to (a) “share” a form with other groups or you want (b) a totally independent form file so changes won’t affect the other file.

(a) Sharing a Form: To “share” a form with other groups, just drag it from “All Available Forms” into the desired group. If you want to “repeat” the form in the same group, then you would need to add a brand new form to the group and then insert the existing form into it as a subform. When you edit a particular form file, your changes will update other areas where it is used in a group or as a subform. See also the Custom Form Studio Help or documentation topic on “Replicating Form Information”.

(b) Making a Separate Copy of a Form: Making a copy of a form so you have two separate unshared files is useful when you want to use your copy as a base for a different but similar form. In this case, you must copy the existing form to a new name. In Custom Form Studio, locate the Available Form, then right-click and Copy. Enter a new filename for your separate copied form. Afterward, locate your new filename in the Available forms, right-click and Edit to customize it further. You also will likely want to drag your copied form into the desired Form Group. (For information on making a copy of an entire group, see the next section)

Note: If the form you copy contains Subforms inside it, then for “everything” in the form truly separate and independent, you may also need to make copies of the subform files themselves and insert the new copied subforms in place of the original ones in your copied main form. Of course, if the subform sections are not going to be different, then you can “share” those pieces with the original form if you like, even though other parts of the main form can be independent.

How Do I Copy An Entire Form Group?

It depends on whether you simply want to (a) rename or copy a group, “sharing” some or most of its forms with another group, or whether you want (b) a totally independent form group and files so changes made to one group don’t affect the other.

(a) Copying an Existing Group Arrangement: To simply copy a group arrangement to another name, but sharing the same form files, right-click the Form Group, choose Copy Group, and enter a name for the copy. Note that both groups share the “same” form files, which means changing their contents will affect both groups. However, the groups are separate so you can rearrange their forms in different orders, or remove or add forms in one group without affecting the other group arrangement.

(b) Creating an Independent Copy of a Group:

To have totally separate and independent groups, with independent form files (so changes made to forms in one group won't affect the other), you must first make copies of each individual form file used within the original group. See previous section "How Do I Copy Existing Forms?" Once you have separate copies of those forms, you can then drag the new copies into a new group. To create a new group, right click within the Form Groups pane and choose Create New Group. Give your new group a name, and then drag your new copied forms from Available Forms into it.

How Do I Make A New Group Of Forms?

To create a new group, right click within the Form Groups pane and choose Create New Group. Give your new group a name. Afterwards drag Available Forms into your new group or right-click the Forms In Selected Group pane and choose to Create New Form.

How Can I Create or Change Ratings used throughout a Form Group?

To change or add Ratings boxes to a form group, in the main Custom Form Studio window, right-click the form group and choose Modify Ratings. We recommend running the Ratings Wizard to adjust the rating labels and other main settings as desired. See Ratings window help for details. When exiting recompile your forms, and then create a new test inspection to make sure your new ratings work and print as expected.

To turn Ratings on/off for particular subheadings, you may right-click the subheadings in the Report Writer and enable/disable them as desired. You may also turn on Ratings for subheading properties while editing them in the Custom Form Studio.

How Can I Quickly Locate a Comment in a Form?

When customizing form contents, use the Find and Find Next toolbar buttons to quickly locate a particular phrase or abbreviation. To find and replace a particular phrase in various comments, after using Find to locate the first occurrence of the phrase, make your change. Then highlight the new text in the item properties and click Copy to save it to the text clipboard. When you use Find Next to locate additional instances of the original phrase, you can just highlight it and Paste your saved clipboard text to quickly replace it. Repeat for additional areas as needed.

How Do I Change The Level Of A Form Item?

To change a narrative level, select it and then click the narrative level arrow tools to decrease or increase the item. Be sure items end up in a valid hierarchy so forms can compile.

Other form items have different Properties, and so cannot just be changed to another level (e.g. headings to subheadings). But you can Insert a new item of the appropriate level and then Cut the item text or label from the original item and Paste it in the new one. Afterward, you can cut the original item from the form tree or adjust it as desired. See prior information about "Cut, Copy, Paste" for more information.

Can I Make Items Always Print On My Inspections?

Yes, there are a couple ways to include standard information you always want printed (Note: For header or footer information that prints on every page, see Report Writer documentation about Page Setup):

Text items that ALWAYS print on the form when it is used may be added using Insert > Text. Text items cannot be edited or turned off from the Report Writer, so don't include comments that won't always apply.

Defaults can be used to automatically select or include certain narratives when new inspections are started. These comments are seen in the Report Writer and may be removed or changed if they don't apply to a particular job. Defaults are frequently used for common conditions or building aspects that "usually" apply, eliminating the time that would otherwise be used to select them. Default desired narratives by ticking the "Default" box in their lower Properties pane. Defaulted narratives display red in the Custom Form Studio tree for easy locating.

Can I Set Items To Automatically Go To Summary?

Yes, various narrative comments may be pre-set to go to summary when selected. Simply choose the desired Summary status in their Properties in the lower pane.

If set to a particular summary area, when the narrative is selected in the Report Writer, it automatically flags the Subheading field or comment for that summary area. Please note that if you are not using Ratings for summary and are using Phone3D or the Marked Fields summary method in the main Report Writer (see Summary Area help topic there), only one summary area can be set for each inspection comment field, thus marking the entire field for the last summary area selected. If different summary areas are pre-set for different narratives in the same subheading, the last one selected overrides. So if you want to use multiple summary areas in a group of narratives, you may want to organize them under separate subheadings to create different inspection fields that can be marked for different summary areas.

How Come My Changes Don't Show Up in My Inspections?

Did you Compile your changes after making them? Right-click the group in Custom Form Studio and Compile as needed. If you did compile, make sure the log does not indicate any errors were detected. If so, you must correct the errors before the changes will update the Report Writer- Help there has details about correcting errors. Also, remember changes only show up for new inspections, not existing ones, so be sure to starting a new one to see your changes.

How Do I Customize My Inspection Printouts?

When start a new inspection directly from the Report Writer, narrative forms with white icons generally use the Report Writer Inspection Page Setup, whereas graphical forms with a yellow icon have a preset printed format.

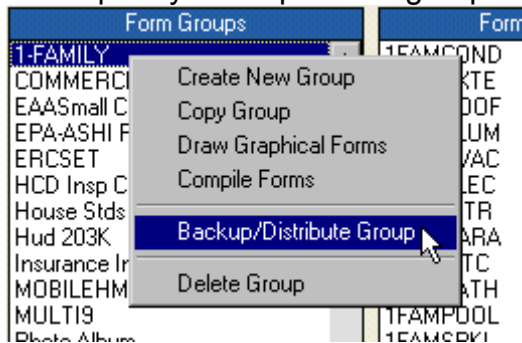
Inspection Page Setup can be customized for narrative inspection forms using File > Page Setup in Report Writer. Various universal “styles” are set for different form elements, which then automatically format reports at print time. See Page Setup documentation in Report Writer.

Graphical Forms that always print as designed in Draw Graphical Forms can only be modified in Draw Graphical Forms (not available in all editions). These typically replicate pre-printed forms that are not designed to be changed, such as government or other official forms that must look a certain way. However, if your edition of 3D software contains the Draw Graphical Form utility, you could adjust the layout of graphical forms or create new ones. See Draw Graphical Forms documentation in the HelpDesk. Otherwise, you may need to contact the forms vendor if a correction or change is needed on a particular graphical form you use.

How Do I Backup, Transfer, Restore, or Install Forms?

Please see the main Report Writer Help and documentation about backing up all your important 3D Inspection System software data files.

However to quickly backup only a particular custom form group and its related files, simply right-click the Form Group and choose Backup/Distribute Group. This method would be used to quickly transfer a form group to another computer, user, or inspector. Or to quickly backup a form group as it exists before making future major changes.



For normal group backup, “Include uncompiled forms in the backup” to make sure all source forms, subforms, and other files used by the group are included. Form distributors who do not want to include source forms may choose not to include these under certain circumstances—See documentation.

After clicking Backup, assign a name for your backup .3DF file, perhaps indicating date or revision information. Backup additional groups you have customized as well. Be sure to frequently backup and save your 3DF backup files in a safe location off your computer for protection. To transfer forms to another computer, first back them up, transfer the backup file, and then install them (see below) on your other computer.

Restoring or Installing New Forms

You can easily restore or install a .3DF form backup anytime using File > Install a set of forms in the Report Writer or Custom Form Studio. Locate open the .3DF file to install.

If some or all of the form files are already installed, you will be warned about overwriting existing files. If you want to backup your current files first, you may cancel the process and backup your existing forms to a separate 3DF file as a precaution, before overwriting them by installing another backup file. It may be normal to get the warning message if you are installing form groups that share some of the same form files.

How Do I Merge Office Management Data Into My Inspections?

Where you want Office Management data to merge into inspections, you must include special merge fields in your narrative comment or text area. To do so, while editing your comment use Insert > Office Management Field to include various merge fields as desired. These items will automatically import the Office Management information from linked jobs when selected.

We also recommend setting those narratives as Defaults so they will automatically merge when your inspection is started. Some forms provided by your vendor may already contain narratives with Office Management fields, which may or may not be already set as defaults. See “Can I Set Items to Always Print on My Inspections” FAQ above for details. Don’t forget to compile forms after updating them so changes affect future inspections.

See Office Management documentation for more information about automatically merging job data into inspections, and how to make sure jobs link so data will import.

For additional information about any Custom Form Studio feature, see the complete documentation provided in the HelpDesk.