Data Repository Information

Summary

You can store designated inspection data in a web data repository, the PDmB DataStore. For a small fee, you can accumulate the data from your inspections in an online database. This database will then be accessible via Internet connection for analysis and review. You can access this inspection data and create reports, either in the default report format or as custom reports designed by PDspect. (Data hosting rates are listed at the end of this document.)

You can also have inspection data you send to the web database automatically e-mailed to addresses you designate. After you submit data to the database the program will generate e-mails containing the information you specify in the various categories. Steps for setting up this e-mail capability are listed later in this document.

The data repository system has three basic parts:

1. The template designer designates which inspection points will be sent to the database and sets up the template for the automatic e-mail feature. ***NOTE:*** Only inspections based on templates set up to support the data repository function can be used in this way.
2. Once an inspector completes an inspection using a template designated for use with the data repository he can send the data to the data repository using the **Tools→Transmit Data** feature.
3. Designated users will then be able to log onto the data repository (data.pdmb.com) to view the data and create reports.

User Accounts

Accessibility and use of this data will depend on the type of account the user has. Three types of user accounts are available.

1. **Account Manager—**When a new account is set up, an account manager will be designated. This person will have the rights to
   a. create other accounts and grant access to Account Reviewers (See #3).
   b. delete inspections.
   c. view all data within an account.
2. **Account Submitter—**This level has rights to submit data to the database only through the inspector application. If a submitter tries to log in to the DataStore through the web interface, the login will fail.
3. **Account Reviewer—**The account reviewer can see and create reports based on the data filter used. The account reviewer has access granted as designated by the account manager.

Template Design Steps

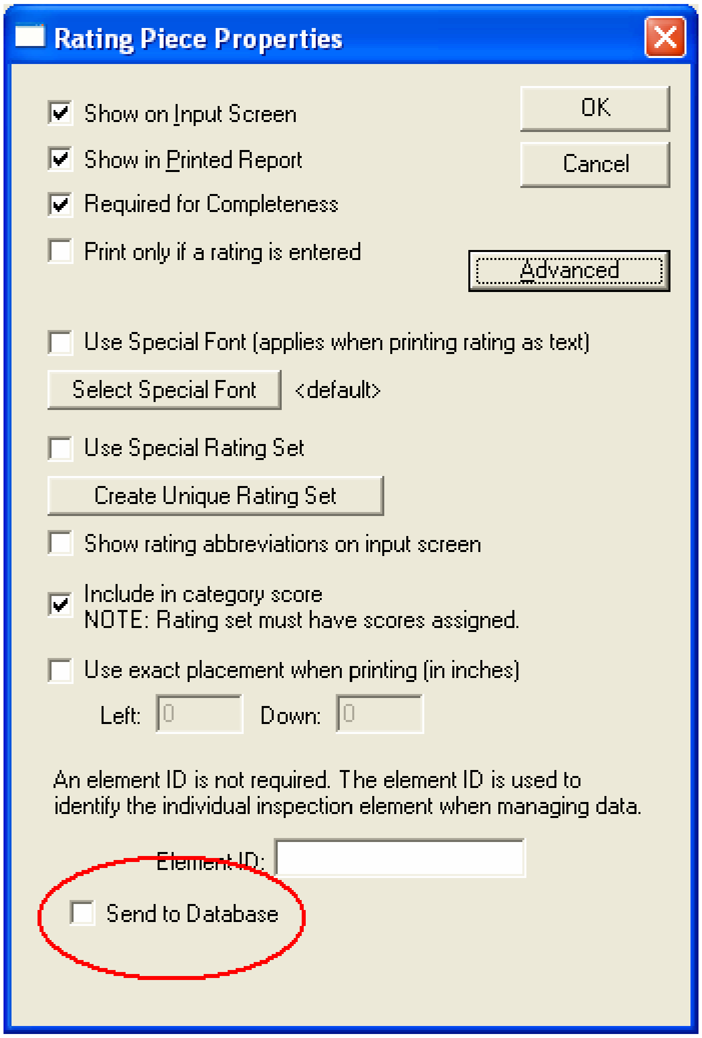
The first step in setting up a template to allow data transmission is to edit the template's properties. This will be explained further in the steps listed later in this document.

Designate data to be transmitted

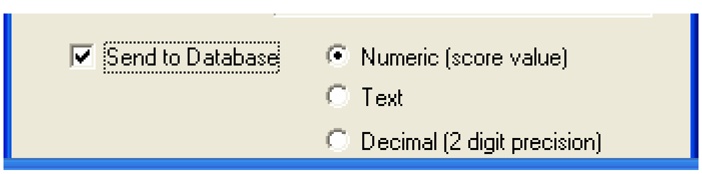
You can designate the inspection items in the following list for storage in the data repository:

- Rating
- QA
- Note
- Checkbox
- Option List
- Score Entry
- Category Score
- Inspection Score

To designate that the data stored in a piece be sent to the data repository you will edit the piece's advanced properties while in Inspection Designer, as shown in the following Advanced Rating Piece Properties window. The **Send to Database** option is indicate in this window.



Enter an Element ID
In order to designate the data that is to be sent, enter an element ID, check the **Send to Database** box, then designate how you want the data to be stored.

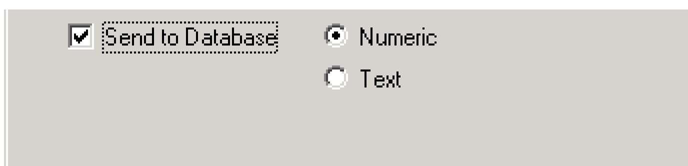


If you attempt to check the box without entering an Element ID, the program will prompt you to enter an Element ID first.

The element ID identifies the individual pieces of data, allowing the user to identify these pieces when the report is sent back.

NOTE: Element IDs can be up to 256 characters, allowing you to enter a designation in plain English without the need to abbreviate.

Designate how to store the data
After you check the box designating the data to be sent, two new options will appear in your window, **Numeric** and **Text**. This will allow you to send the data in either of these two formats. ***NOTE:*** Q/A and Note Properties windows allow a third option, **Decimal,** as shown previously. All pieces have the option to export as text or numeric format.



Choose how you want the data to be stored and click **OK** on the piece properties window. Following is how the data will appear depending on the piece and the format you choose.

Rating
Text—The text of the rating(s) selected
Numeric—The score value assigned to the first rating selected
If you do not define a score for the rating the program uses the ordinal position of the first selected rating (i.e., if the first rating is selected the answer is 0; if the second is selected, the answer is 1, etc.). If you do not select a rating the answer will be empty "". ***NOTE:*** If you select multiple ratings only the first will be reported.

Q/A
Text—The text entered
Numeric—The value of the text entered translated into a number. Only numeric entries are accepted so you must make this entry in numeric format; otherwise, the entry will default to zero. For example, if you enter "2" then a 2 will be sent to the database. If you enter "two" a 0 will be sent to the database.
Decimal—The value of the text entered translated into a number accurate to two digits

Note
Text—The text entered

Numeric—The value of the text entered translated into a number
Decimal—The value of the text entered translated into a number accurate to two digits

Checkbox
Text—If checked, the text of the checkbox; otherwise, an empty string “”
Numeric—If checked the number one, else zero

Option List
Text—If an option is checked, the text of the selected option; otherwise, an empty string “”
Numeric—The ordinal position (zero based) of the option selected: if nothing is selected -1

Score Entry
Text—The string of the score entry
Numeric—A number representing the score. Even if the scoring system defines itself as an alpha, there is a number that represents that score value.

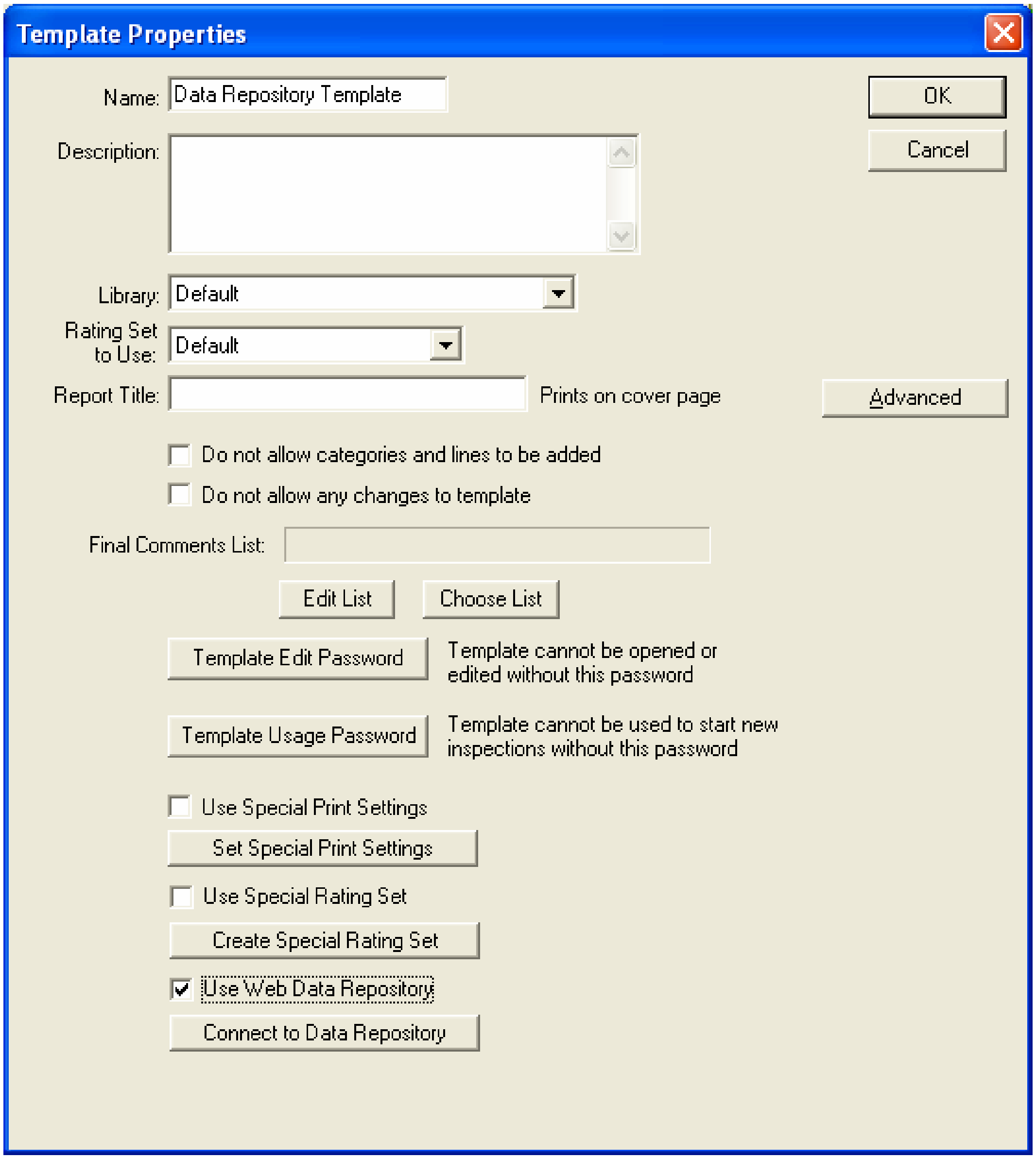
Category Score
Text—The number value of the score in a string
Numeric—If the score type is a Total, the numeric total as a whole number; otherwise (Average or Percent), the number expressed as a decimal number (two digit precision). Percentages are expressed as whole numbers, i.e., 69.5% = 69.5.

Inspection Score
Text—The number value of the score in a string
Numeric—If the score type is a Total, the numeric total as a whole number; otherwise (Average or Percent), the number expressed as a decimal number (two digit precision). Percentages are expressed as whole numbers; i.e., 69.5% = 69.5.

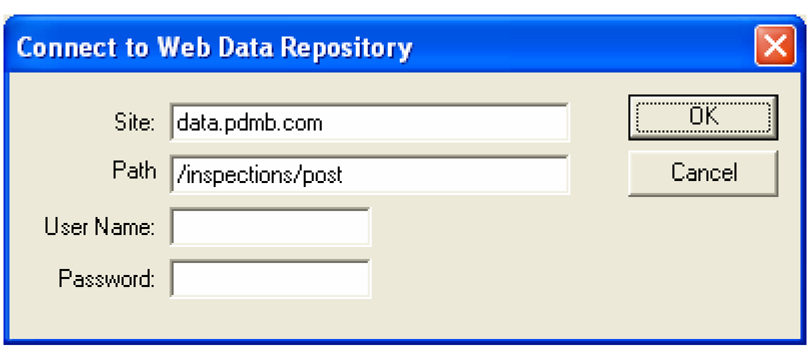
Setting up the Template to use the Data Repository and Automatic E-mail Capability

Following are the steps involved in using a template and inspection with the web data repository features. ***NOTE:*** The template builder will be given a user name and password to be inserted into the template. As discussed, users have various levels of rights, and by default the user name and password should indicate that the user type is “submitter”. (See the User Accounts information presented previously for more details on user rights.)

Editing template properties
In Inspection Designer select **Edit→Template Properties** from the menu line. The Template Properties window will appear. Click the **Advanced** button and the window will display additional features. Check the **Use Web Date Repository** option.

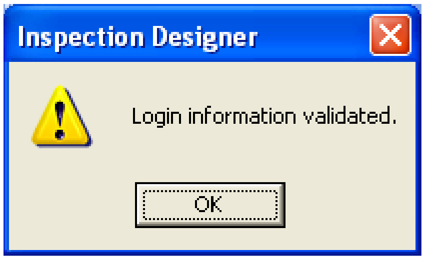


Click the **Connect to Data Repository** button if it doesn't appear and the Connect to Web Data Repository window will appear.



This window will be populated with default information. When you purchase the data hosting services, you will be provided with a unique user name and password. Enter your user name and password, then click **OK**.

When you click the **OK** button in this window, a connection is made to the server and the user name and password are validated. If the information is correct the following window will appear.



If the information is not correct, the following window will appear.

NOTE: Because this process talks to a server via IP communications, you may get firewall questions or be warned about "Internet" activity. You must allow the activity in order to complete the process. Even if your computer is talking to a server sitting next to your computer, you will still be warned about this activity.

Setting up automatic email

To set up a template for automated e-mail, add a category(s) named "autoemail". Set this category so that it will not show in print or on screen. You can add multiple categories so that multiple sets of e-mails will be generated, allowing you to send different information to different people.

The first line of the autoemail category contains information for the e-mail and requires certain fields. These required fields are composed of the following text element IDs.

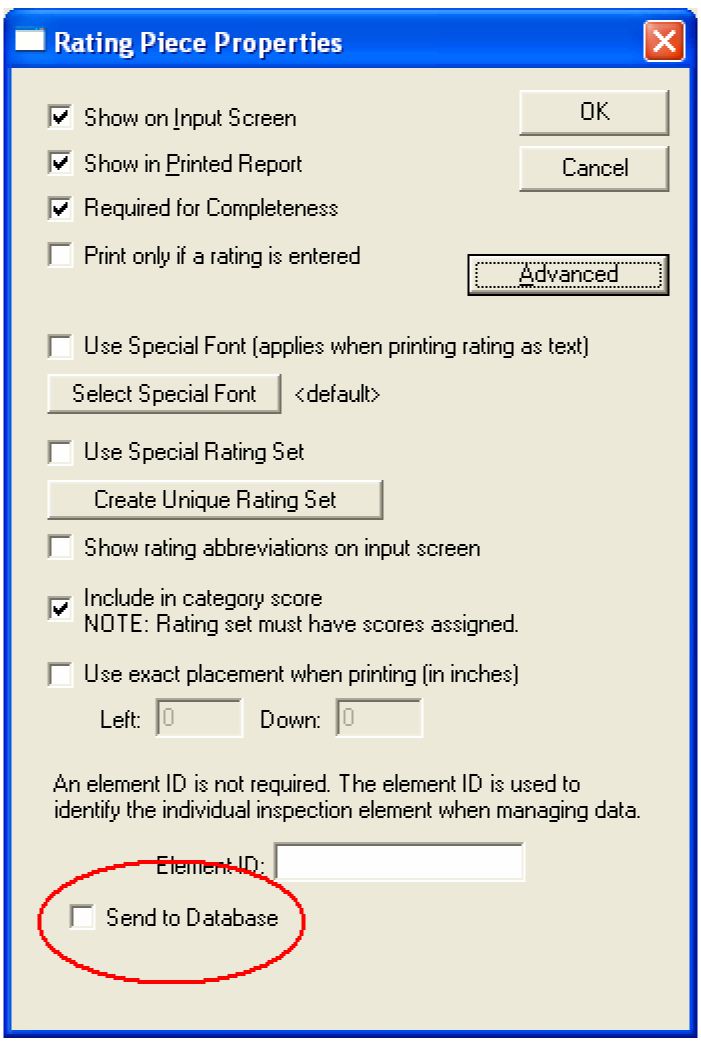
Element ID	Content
[[Site]]	The site where the e-mail is generated. By default this is www.pdmb.com.
[[Path]]	The path to the page where the e-mail is generated. By default this is autoemail/auto.php.
[[Title]]	The subject of the generated e-mail. ***NOTE:*** You can use merge fields.

[[To1]]	The recipient(s). You can type a hard address such as
…	(will@pdmb.com) or use a merge field (i.e., {{Supervisor email}})
[[To10]]	You can specify up to 10 recipients.

The second line of the category contains the contents of the category, which will become the body of the e-mail. If you want to send text from the summary use the merge field {{Summary Text}}. Remember that when you use merge fields you must match the name and format of the merge field exactly.

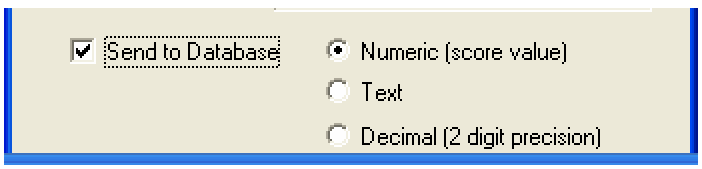
Designating data to include

Designate which elements are to be sent to the database by adding one of the specified data pieces to a line in a regular category in the template then opening that element's piece properties window and clicking the **Advanced** button. The option to send this piece to the database will be shown on the Advanced window, as shown in the following Advanced Rating Piece Properties window.



You cannot send an element to the database unless you have provided an element ID for that item. If you attempt to check the Send to Database box without entering an Element ID the program will prompt you to enter an Element ID first. If you do not you will see a window telling you that you must enter an element ID.

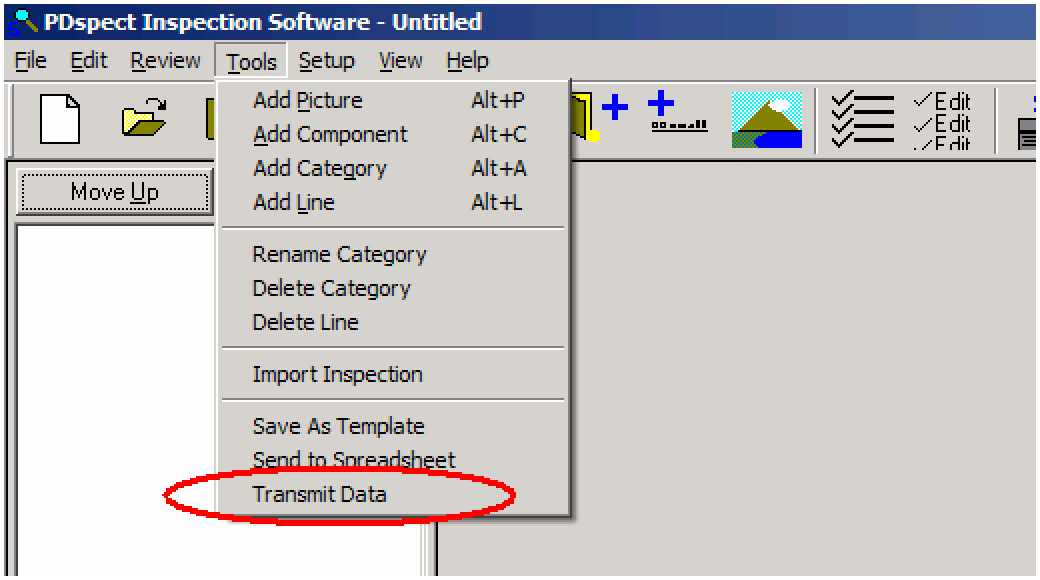
After you have entered the element ID and clicked the **Send to Database** option you will see the options for the manner in which you want to send the data to the database; numeric, text, or, in some cases, decimal, as explained previously.



Use the Advanced windows for all the applicable pieces you want to send to the database. After the template is complete an inspector can use it to send data for these inspection pieces to the database. This information as well as report information is explained later in this document.

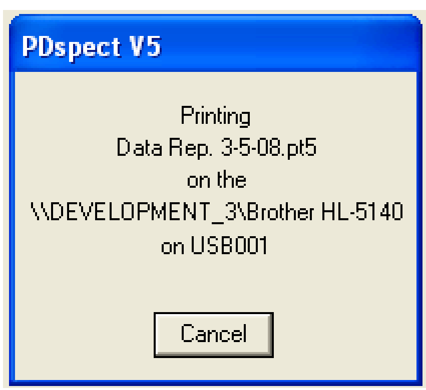
Transmitting Data

Once you (or another inspector) complete an inspection with a template that has data repository elements defined in it select **Tools→Transmit Data** to send the data to the data repository. You will be notified when the transmission is successful. This is the only step necessary for any inspector using this template to complete to transmit this information.



If you are sending the inspection from the desktop version of PDspect, yYou will briefly see a print window displayed while the data is being sent. This is because the program is creating and uploading a PDF of the report to the database along with the data. This may also make the screen appear that it is "printing" for a long time. If the report includes many pictures it will seem especially slow.

When you Transmit Data from the Pocket PC, no PDF is sent to the database, so there will not be an option to view a PDF of an inspection sent form the Pocket PC.



When the inspection has been successfully sent to the database the following window will appear.

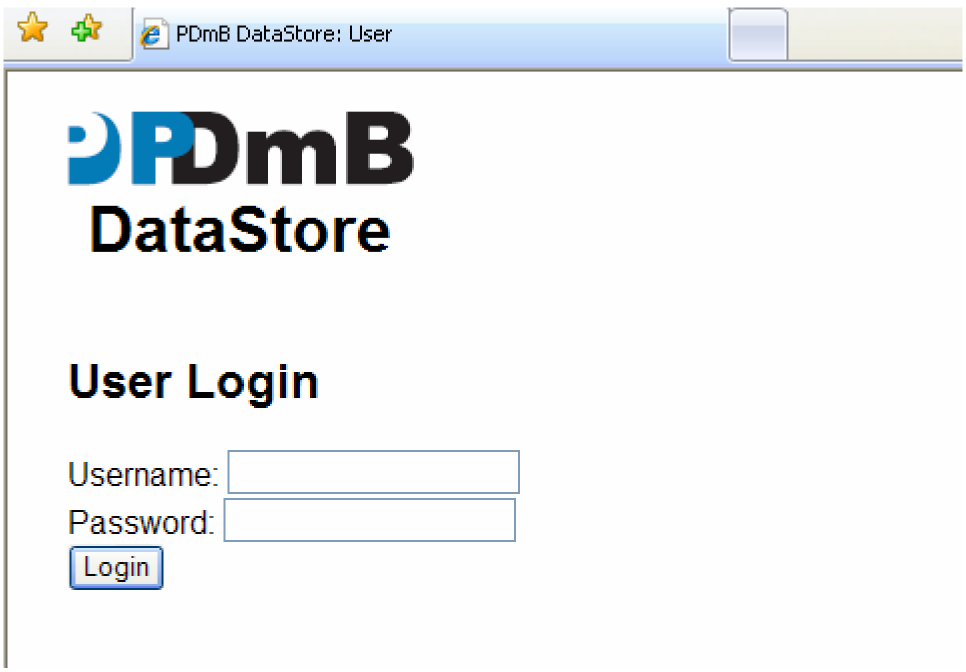
NOTE: If you send the same inspection twice the more recent data overwrites the previous data. However, you can save an inspection with two different names using SaveAs. When you do this the database will treat the new file as a new inspection and show the original and the Saved As inspections separately.

Logging in and Creating/Printing Reports

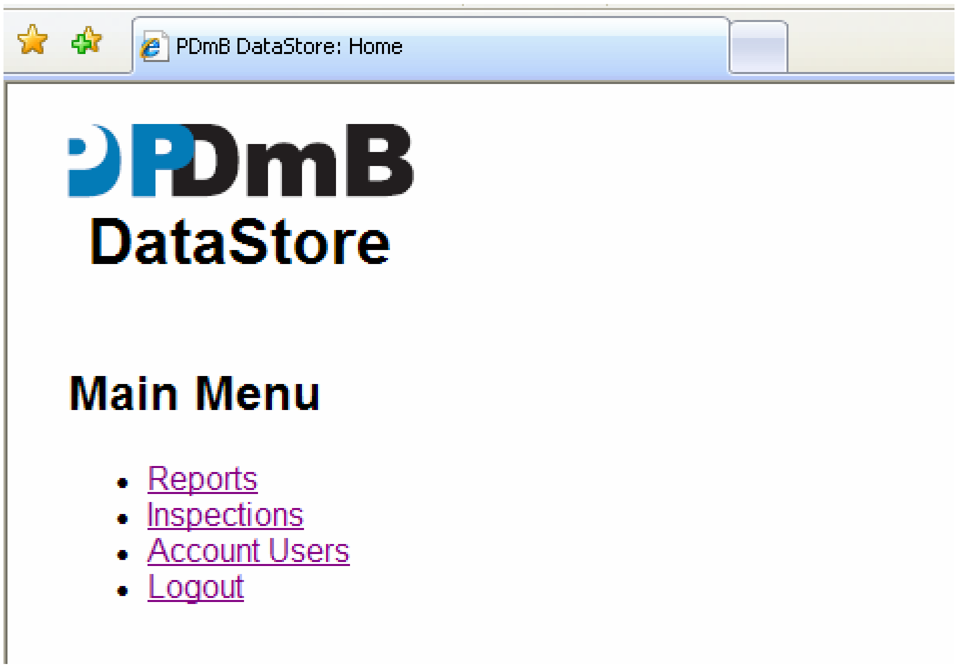
Once data is accumulated on the web site, a user with the proper rights can log in and create and print reports based on the inspection data. Reports will fall into two categories: Standard and Custom. **Standard Reports** are designed to be easy to use, create, and understand, and can be created and saved from within the standard report interface.

Standard reports give you the option to choose a saved report, choose which fields are contained in a report, and create filters with which to limit or refine the data being shown.

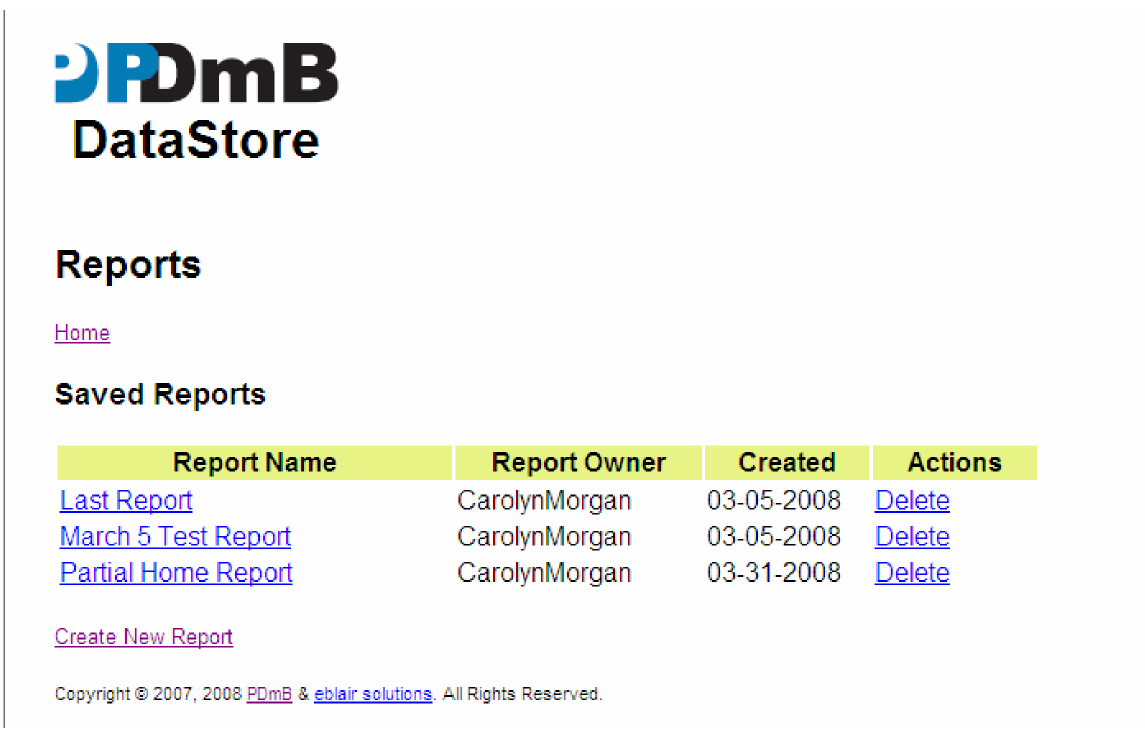
1. To access the data repository go the web site (http://data.pdmb.com) and enter your name and password to log in.



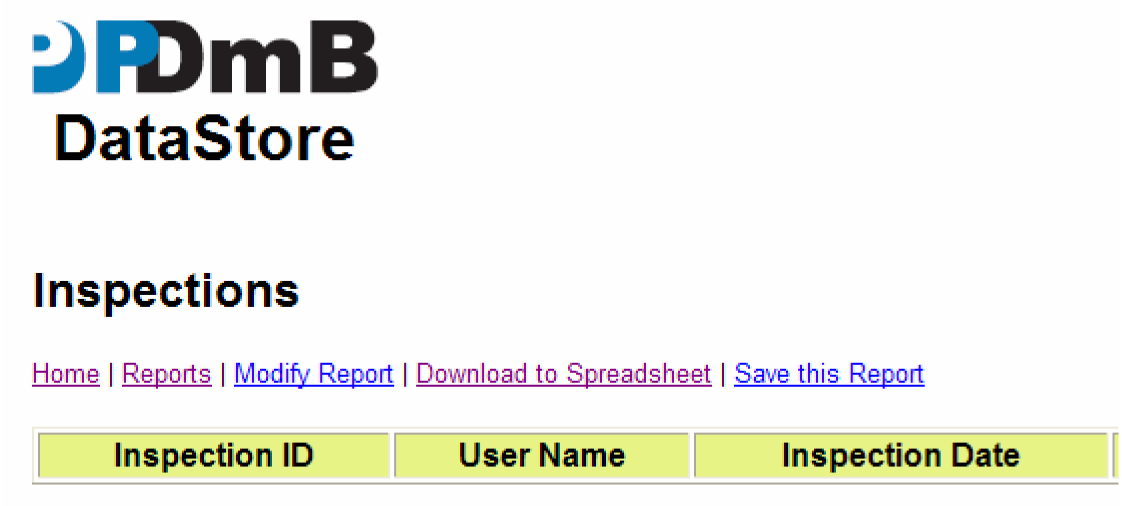
2. Depending on your user rights you will see one or three options you can access, plus the logout option. Users assigned as account reviewers will see only the **Reports** and **Logout** options.



The **Reports** option lists the reports saved by name, the owner (inspection creator), the date it was created, and the actions available for this report. This window also provides the option to create a new report.



When you click one of the report names on this window further options are provided.



Click **Modify Report** to make any changes to the report. ***NOTE:*** Only users with the proper authority can modify inspections.

Click **Download to Spreadsheet** to download a csv file of the report that will be automatically opened by a spreadsheet program such as Excel, if you have one installed.

You can use the **Save this Report** feature to save the parameters of this report as a new "saved" report so that you will not have to recheck and enter the parameters (explained later) each time you want to run the report. Click **Save this Report** and the Save Report window will appear.

PDmB DataStore

Save Report

Back to Report

Name:

Description:

Save

Save the report with a name and description and it will be listed in the Saved Reports window.

Reports

Home

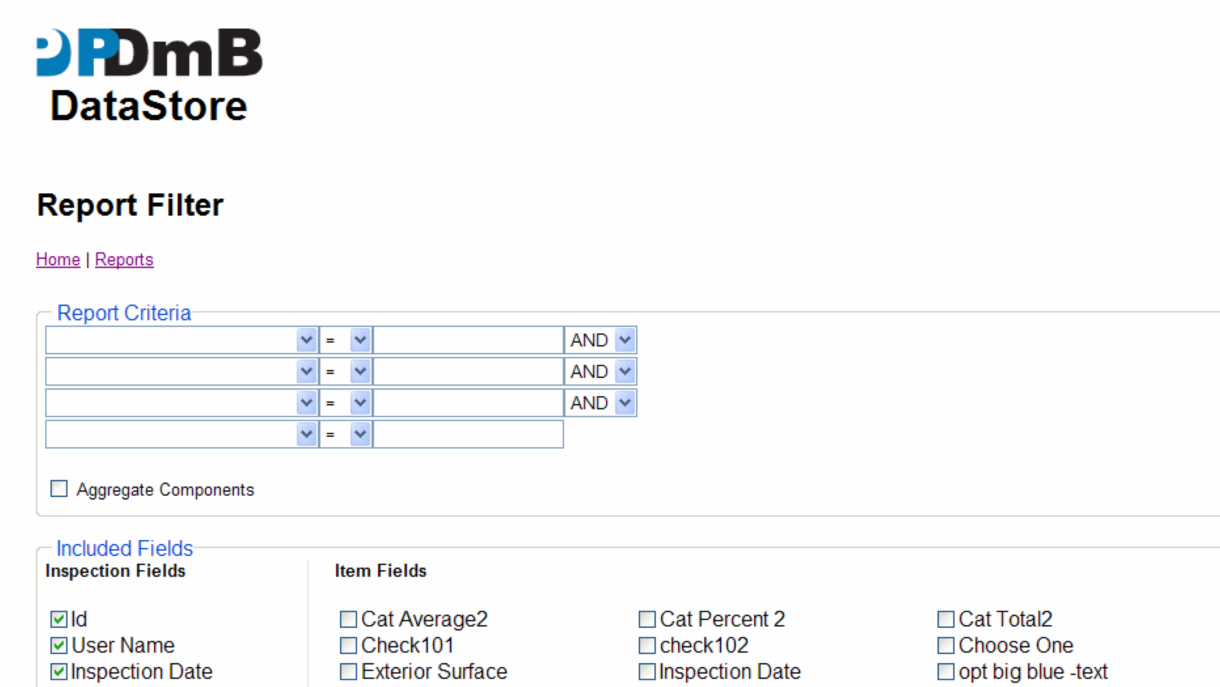
Saved Reports

Report Name	Report Owner	Created	Actions
Last Report	CarolynMorgan	03-05-2008	Delete
Saved Partial Home Report	CarolynMorgan	04-09-2008	Delete
March 5 Test Report	CarolynMorgan	03-05-2008	Delete
Partial Home Report	CarolynMorgan	03-31-2008	Delete

Create New Report

These are standard report types. PDmB can create custom reports and design them to fit specific needs for customers.

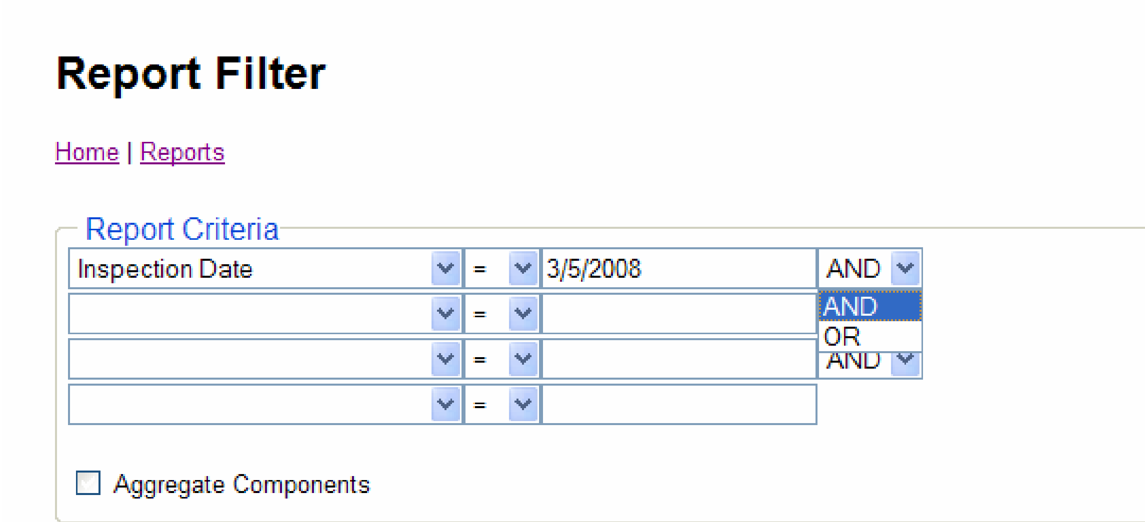
When you want to create a new report from this window click **Create New Report**. The Report Filter window will appear.



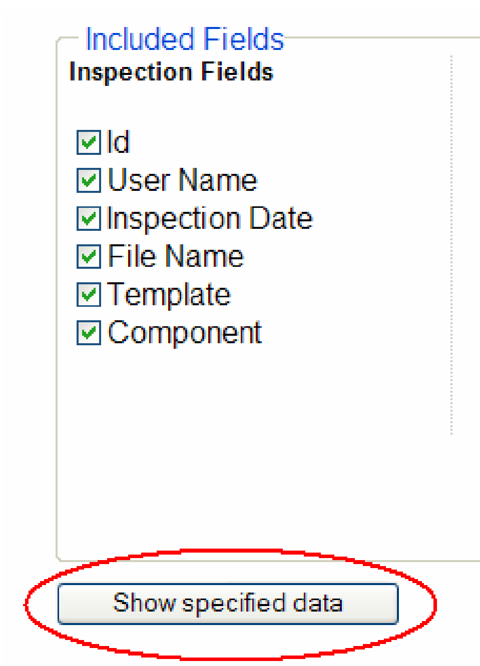
This window provides several filters or parameters by which you can create and view reports; for example, inspection date, user name, or template. The Report Criteria dropdowns provide several of these parameters you can use to create the type of report you want.

As explained previously you can create a report by specified parameters then save it with a descriptive name so that you can access this information easily without having to re-enter the parameters each time.

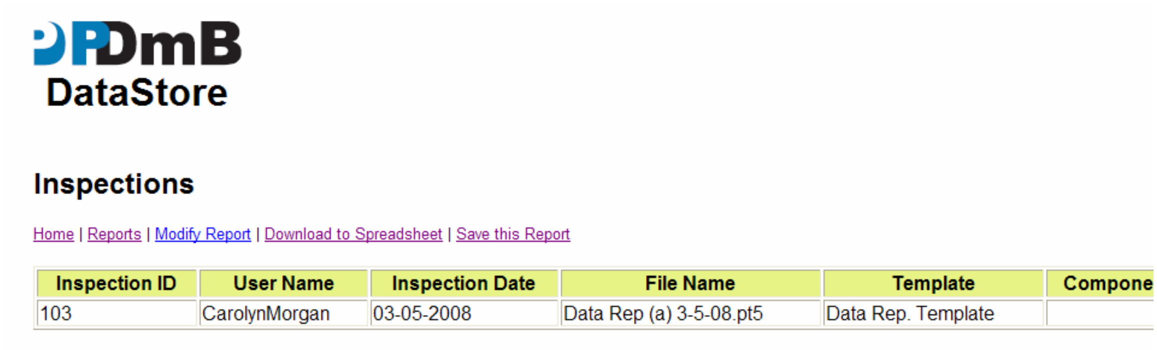
The following illustration shows a report parameter of a specific inspection date. This illustration also displays the And/Or option available at the right of these parameters so you can further refine the parameters for a particular report.



After you have selected the parameters in the Report Filter window click the **Show specified data** button.



Following is an inspection shown with a specified parameter of ID.


PDmB
DataStore

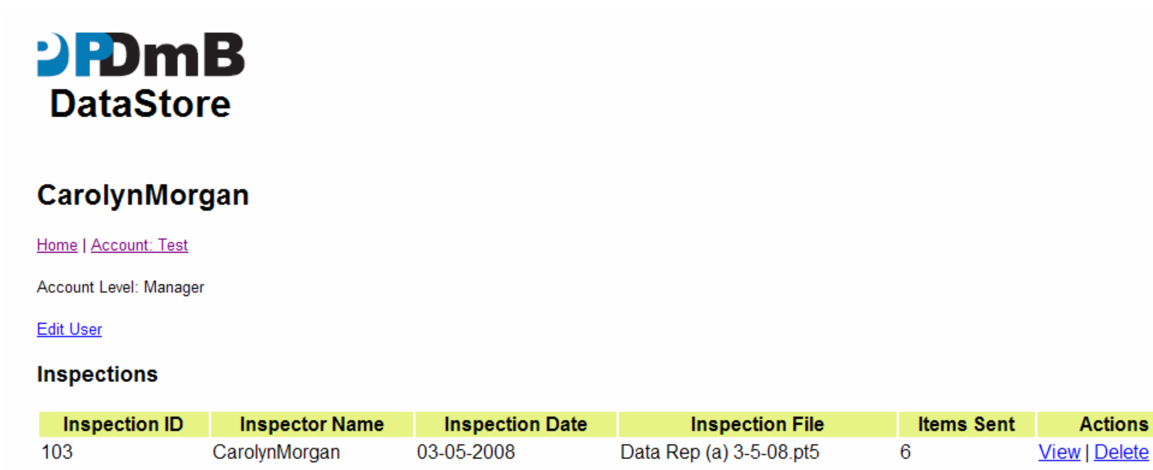
Inspections

Home | Reports | Modify Report | Download to Spreadsheet | Save this Report

Inspection ID	User Name	Inspection Date	File Name	Template	Compone
103	CarolynMorgan	03-05-2008	Data Rep (a) 3-5-08.pt5	Data Rep. Template	

The makeup and appearance of these reports will vary widely according to the type of inspections they are and the information they contain.

The **Inspections** option on the Main Menu page (not available to account reviewers) lists the existing inspections by ID, inspector name, inspection date, the template used, the inspection file name, the number of items in the inspection, and an option of whether to view the inspection or delete it.


PDmB
DataStore

CarolynMorgan

Home | Account: Test

Account Level: Manager

Edit User

Inspections

Inspection ID	Inspector Name	Inspection Date	Inspection File	Items Sent	Actions
103	CarolynMorgan	03-05-2008	Data Rep (a) 3-5-08.pt5	6	View | Delete

To view an inspection from those listed click **View** on that line and the inspection will be displayed as shown next.

PDmB DataStore

Inspection

Home | Inspections

Inspection ID: 107
Inspector Name: FIDataPost
Inspection Date: 03-30-2008
Template: Fisher 1 (r12)
File Name: 162 Fisher.pt5
View PDF:
Items Sent: 280
Date Created: 2008-03-31 20:31:10

The **Account Users** option on the Main Menu page (not available to account reviewers) lists the users with the rights to access this site and their levels.

PDmB DataStore

Account Users

Home | Account: Test

Id	User Name	Account Level	Actions
1	admin	Admin	Edit User Delete
2	manager	Manager	Edit User Delete
4	reviewer	Review	Edit User Delete
6	Adam.Singer	Review	Edit User Delete
7	don.peak	Review	Edit User Delete
28	CarolynMorgan	Manager	Edit User Delete
20	A13G2	Review	Edit User Delete
21	will	Review	Edit User Delete

User levels were explained previously in this document.

Use the **Logout** option on the Main Menu page to leave the site.