TECHNOSOFT, INC.

Inquest Version 5

User's Guide

FIRE & LIFE SAFETY SOFTWARE

Inquest Version 5 User's Guide

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Chapter

1

Getting Started

Improved productivity in the office and on the service route await you in this latest version of Inquest. Before you get started, you'll have to take a few simple steps to install the program files on your computer's hard disk.

Installing Handheld Communication Software

To use the mobile computing / bar coding feature install Microsoft ActiveSync for Windows Mobile handhelds or install Palm Desktop if using Palm OS handhelds.

To begin the setup program follow these instructions:

1. First, close any open programs.

2. Insert either the ActiveSync or Palm Desktop CD-ROM into the computers CD-ROM drive.

3. The software setup program will start automatically. Follow the instructions on your screen to complete the installation.

Installing Inquest

To begin the setup program follow these instructions:

1. First, close any open programs.

2. Insert Inquest CD-ROM into the computers CD-ROM drive. Depending on your computer, if you're installing from a CD-ROM for the first time, Setup might start automatically. If it does, you can skip the following steps and follow the instructions on your screen. If Setup doesn't start automatically, follow the instructions below.

3. Click the Start button on the taskbar.

4. Point to Settings, and then click Control Panel.

5. Double-click Add/Remove Programs.

6. Click the Install button, and follow the instructions on the screen. That's all there is to it!

Registration Number

Registration numbers are unique for each computer that Inquest is installed on. If you do not have a registration number you must contact Technosoft after installing the software and purchasing a software license to receive your registration number.

Inquest will operate for 30-days without a valid registration number.

Starting Inquest

After successfully installing the software you are ready to begin. Start Inquest by double-clicking Inquest icon on the Windows Desktop.

The first time you start Inquest you will be prompted to enter information regarding your company.

Company Information

Company information is information about your company. This information is used to print your company name on the report headers and to default certain information when it is not entered for a customer. An example of default information is the area code for phone numbers.

To update any company information after it is initially entered, from the "File" menu select the "Company Information…" menu item. A form will be displayed in a window with your company name and address. After making any changes select the "Save" command on the "File" menu or press the  icon on the toolbar.

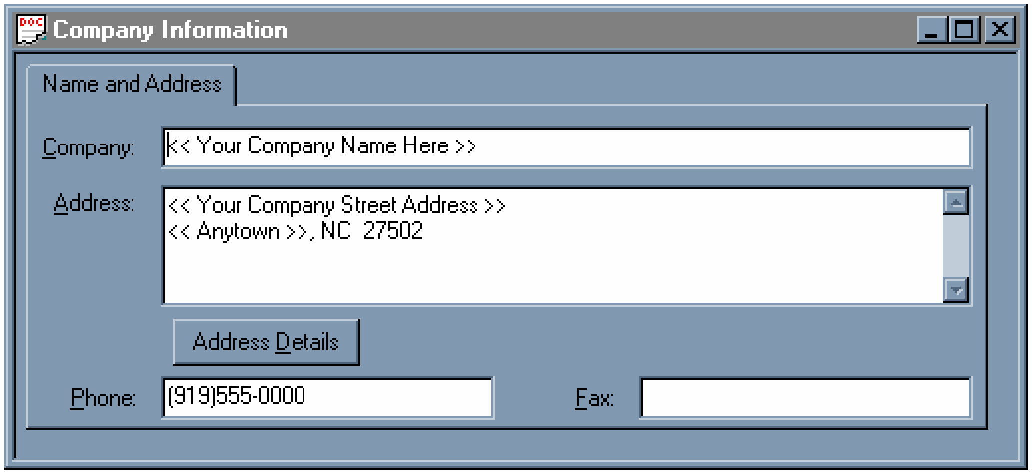


Figure 1 Company Information

Handheld Setup

Inquest has the capability to complete work orders on handheld computers based upon the Palm OS and Microsoft Windows Mobile. Using Inquest on a handheld computer requires the Palm Desktop Software for Palm OS based handhelds and Microsoft ActiveSync for Windows Mobile handhelds installed on your PC.

The Palm Desktop and Microsoft ActiveSync will synchronize and backup data from the handheld computer to your PC. It is also used to install software onto your handheld device. Each handheld will have an associated “User” name with the synchronization software. A “User” name can be created in advance with the synchronization software or during the first synchronization with the handheld. See the Palm Desktop or Microsoft ActiveSync documentation for further details.

Note: Inquest for Windows Mobile requires the Microsoft .NET Compact Framework. Install the .NET Compact Framework from Inquest CD or the Internet.

Handheld Program Install

To install Inquest handheld program follow these instructions:

1. Start Inquest.

2. For Windows Mobile handhelds place the handheld computer in its cradle connected to your desktop computer.

3. From the “Handhelds” menu select the “Install” option.

4. In the displayed dialog select either the Palm OS or Windows Mobile option.

5. Click the "Install" button.

6. Windows Mobile handhelds will automatically start the install process on the connected handheld computer.

7. Palm OS installs will display a dialog box. Select the "User" name associated with the handheld to install the software on and press the "OK" button.

8. The Palm Desktop Install Tool should now list "TheExtinguisher.prc" to be installed during the next HotSync operation.

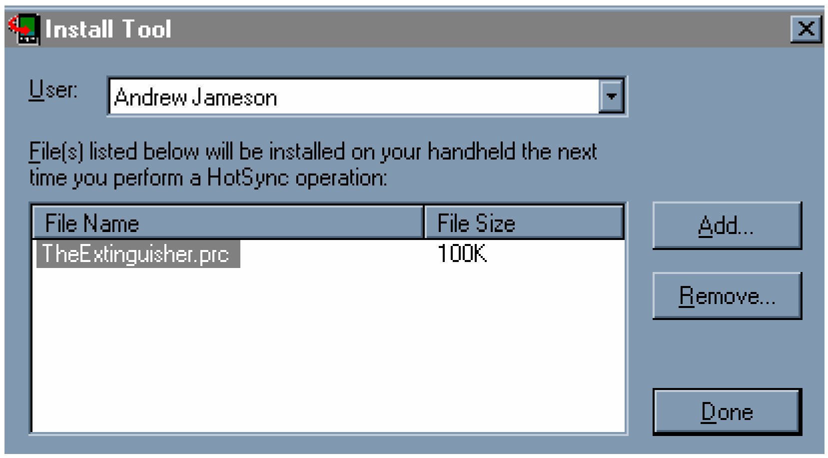


Figure 2 Palm Desktop Install

9. Click the "Done" button and perform a HotSync with the handheld computer by placing it in the cradle and pressing the HotSync button on the cradle. For more information on performing HotSync operations see the Palm Desktop documentation.

Data Synchronization Requirements for Windows Mobile

See Chapter 13 Remote Server for setting up and synchronizing Windows Mobile handheld devices.

Data Synchronization Requirements for Palm OS

Before data can be transferred to the handheld computer from Inquest desktop application the following items must be setup. Detailed instructions on these five steps follow.

1. An "Employee" record must be associated with a Palm Desktop "User" name.

2. Inquest "Synchronization Module" must be installed into the Palm Desktop Software.

3. Inquest handheld configuration database must be updated and synchronized with the handheld computer.

4. Indicate the types of services the technician assigned to the handheld is responsible for.

5. Turn on synchronization for Inquest.

Assigning a Handheld to a Technician

Associating an "Employee" record with a Palm Desktop "User" name is described in chapter 6 of this manual, "Entering Employee Information".

Palm OS Synchronization Setup

To install Inquest synchronization module; follow these instructions:

1. Start Inquest desktop application.

2. From the "Customize" menu select the "Options…" menu item.

3. On the "Synchronization" tab there is a status field for each handheld type supported. The status can be one of the following values:

   - "Palm Desktop Not Installed": the Palm Desktop must be installed before Inquest conduit is installed.

   - "Palm Conduit Support for COM – Not Installed": the Palm Desktop is available but COM support is not. Install COM support from Inquest CD or the Internet.

   - "Not Installed": the Palm Desktop is available and the Inquest synchronization module is not installed.

   - "Installed": Inquest synchronization module has been installed and is recognized by the Palm Desktop Software.

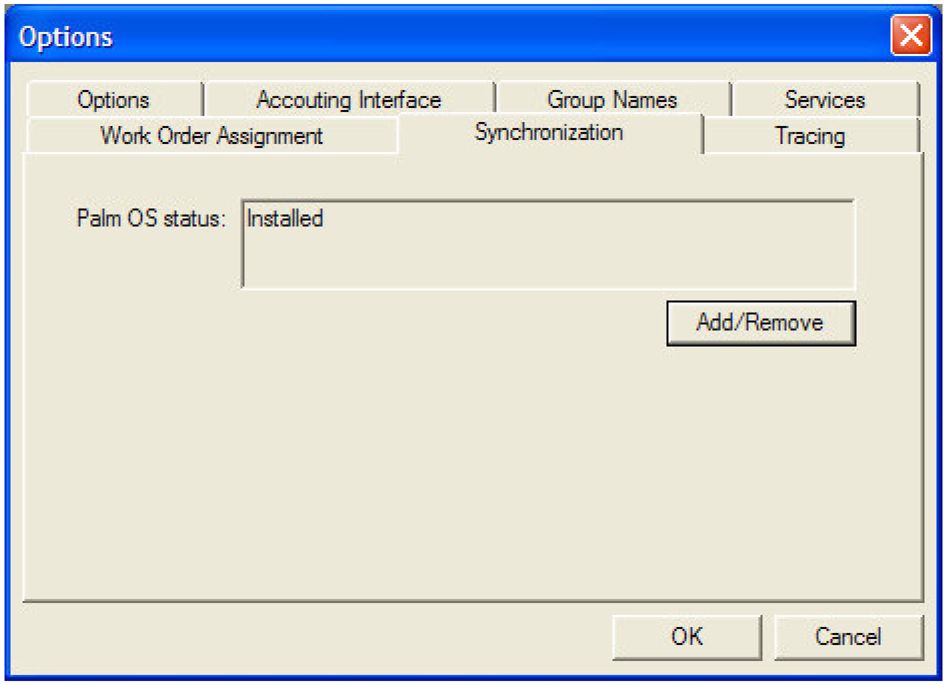


Figure 3 Synchronization Module Install

4. Click the "Add/Remove" button to install Inquest synchronization module into the Palm Desktop Software.

Handheld Configuration Database

To update the handheld configuration database follow these instructions:

1. Start Inquest desktop application.

2. From the "Handhelds" menu select the "Configure…" menu item.

3. Select the configuration items that need to be updated by checking the appropriate check boxes.

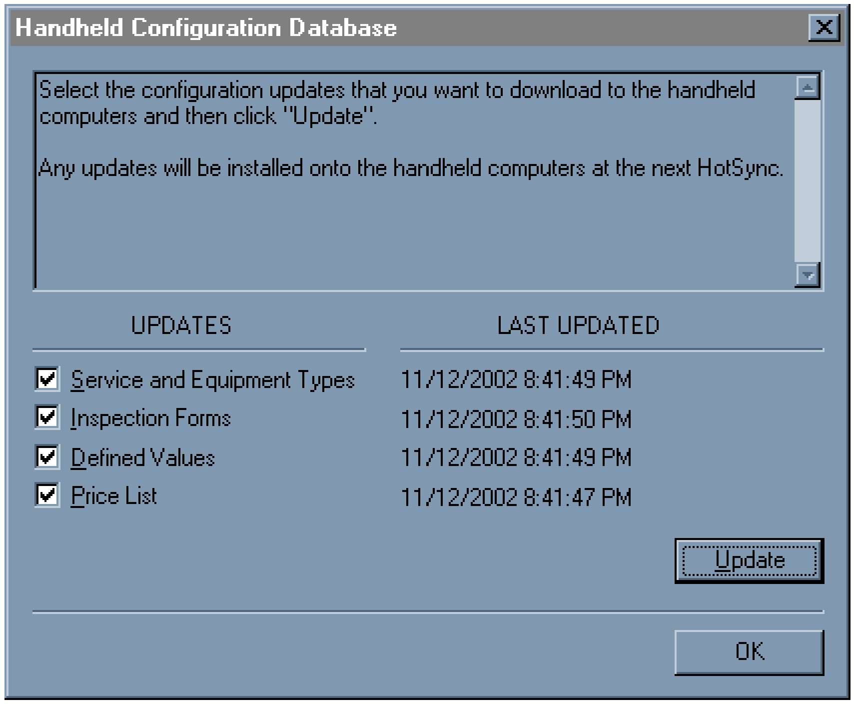


Figure 4 Handheld Configuration Database

4. Click the "Update" button.

Service Types Available on Handheld

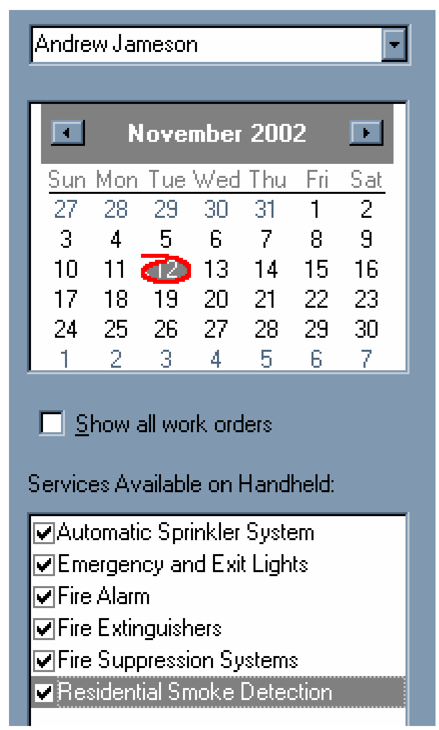
To indicate what types of services to include on a handheld follow these instructions:

1. Start Inquest desktop application.

2. From the "Handhelds" menu select the "Work Orders" submenu and then select the "Assignment…" menu item.

3. Select the Technician name to update in the drop down list of technicians.

4. Indicate the service work the technician performs by checking the appropriate boxes next to the service descriptions listed.



5. Save any changes.

After completing the data synchronization requirements an initial synchronization operation is required. After the initial synchronization is completed the handheld is ready to use. Work orders can now be assigned to the technician and downloaded to the handheld computer.

QuickBooks Setup

The optional accounting feature allows Inquest to share data with QuickBooks accounting software from Intuit.

Enabling Accounting Interface

To enable the accounting interface follow these instructions:

1. Start QuickBooks and open the company file to be used by Inquest program using the Admin user id and password.

2. Start Inquest desktop application.

3. From the "Customize" menu select the "Options…" menu item.

4. On the "Accounting Interface" tab click on the "QuickBooks" radio button.

5. Select a QuickBooks company file to use by clicking the "Browse" button. A file selection dialog box will open allowing you to locate the correct company file. After browsing to the company file location select it with the mouse and click the "Open" button.

6. Click the "OK" button to update the "Accounting Interface" information.

The first time Inquest attempts to access your QuickBooks company file; QuickBooks will ask you to grant permission to Inquest. By clicking on the "Yes, always" button you will grant Inquest permission to access the company file and you will no longer be prompted to allow Inquest access.

Access can also be granted to Inquest program so that QuickBooks does not need to be running at the same time. See your QuickBooks documentation for further details.

Billing Tests/Inspections/Services

See "Price Lists" in Chapter 10 "Customizing Inquest" for details on setting up Inquest to create an invoice from a work order.

Upgrading From Previous Version

This information only applies for major upgrades, i.e. version 3.5 to 5.x. Any minor updates can be immediately installed.

Existing Jobs on a Handheld

Any completed jobs on the handheld need to be uploaded before upgrading from 3.5 to 4.x. The handheld databases between versions 3.5 and 4.x are different and no conversion is available.

Jobs that have not been completed will need to be reassigned and downloaded back to the handheld after the upgrade.

Install

Install Inquest to the same location as the previous version. Installation instructions are provided earlier in this chapter.

Database Conversion

The first time Inquest is started after the upgrade the database will be converted. The database for the previous version is left intact and a new database is created. An estimated conversion time will be displayed before the conversion process begins.

Registration Number

Registration numbers are unique for each computer that Inquest is installed on. You must contact Technosoft after installing the software to receive your registration number. After upgrading, Inquest will allow you to use the software for 30-days without a valid registration number.

Networked Databases

For performance reasons, it is recommended that a networked database be converted from the computer where the database resides and not over the network. Access to a networked database is not allowed without a valid registration number.

Chapter 2

Exploring Inquest

Inquest is the most comprehensive software product for the Fire Protection Company. This chapter will assist in familiarizing you with the many features of Inquest allowing you to gain immediate benefit for your company.

User Interface

Inquest has an easy to use and consistent user interface, which allows you to get up and running quickly.

File Menu

The "File" menu is the starting point for most of Inquest's functions.

- "New" and "Open": are used to add new and update existing records in your company database.
- "Reports": is used to select any of the available reports produced by Inquest for print or preview.
- "Company Information": is used to update your company's name and address.
- "Database": will display a submenu that has options related to Inquest database file. These options are described later in this chapter in the Database Backup/Restore and Database Import/Export sections.

Tabbed Window Forms

Inquest groups related information by using tabbed windows. All the information contained on a tabbed window is related to the title associated with the tab. Here is where information is entered relating to a service location, an employee, or report creation criteria for the data you are interested in.

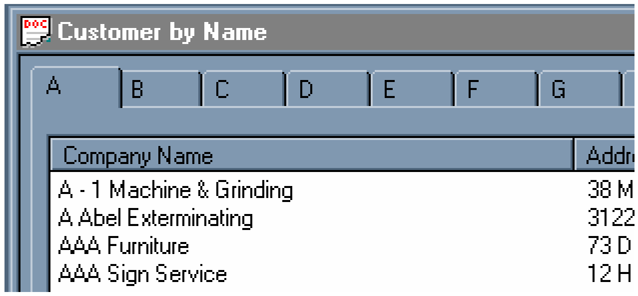


Figure 5 Tabbed Window Form

List Windows

Windows that list information are consistent throughout the program. In these windows you can select a specific record and press an "Edit" button to open a window form and update the data. An "Add" button will allow you to add new records, while a "Delete" button allows you to remove records from the database.

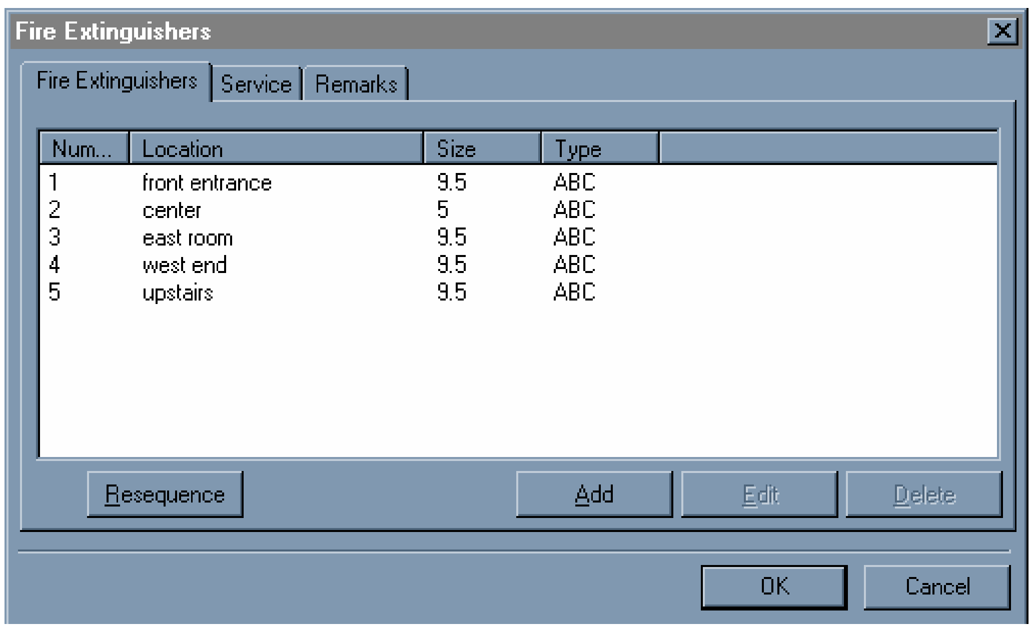


Figure 6 List Window

Tree Views

Tree views are expandable and collapsible list windows. The parent item will have a box to the left of the item with a "+" when it is collapsed and a "–" in it when it is expanded. Clicking in the box will expand or collapse the list.

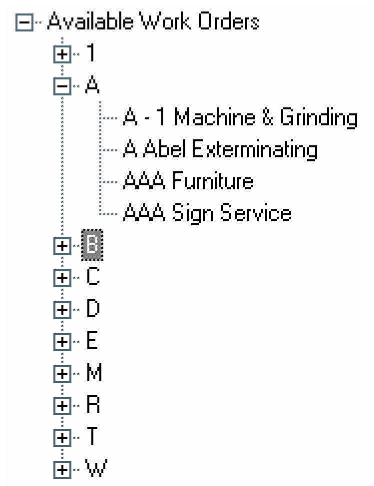


Figure 7 Tree View

Error Processing

When the user attempts to save the data entered to the database, Inquest will validate required fields and valid data formats. All fields in error will be highlighted in red. When a field in error is given keyboard focus the associated error message will appear in the status bar of Inquest.

Database Backup/Restore

It is good practice to make backups of your computer hard disk drive. Inquest comes with the capability to backup and restore your company's database file. From the "File" menu select the "Database" option. From the submenu select the option to backup or restore the database file. It is recommended that you have a high capacity storage device for your backup file.

Database Export/Import

The "Export" and "Import" options on the "Database" submenu allow specific customer records to be exported and imported.

When "Export" is selected, a customer search window is displayed to enter criteria for the customer records to be exported. Once the customer search is completed a list of customers is displayed. Any customer can be removed from the export list by selecting their name and pressing the "Remove" button. Once all customers to be exported are listed, press the "Export" button to save the specified customer records to a file. Inquest will prompt for a filename and location to export to.

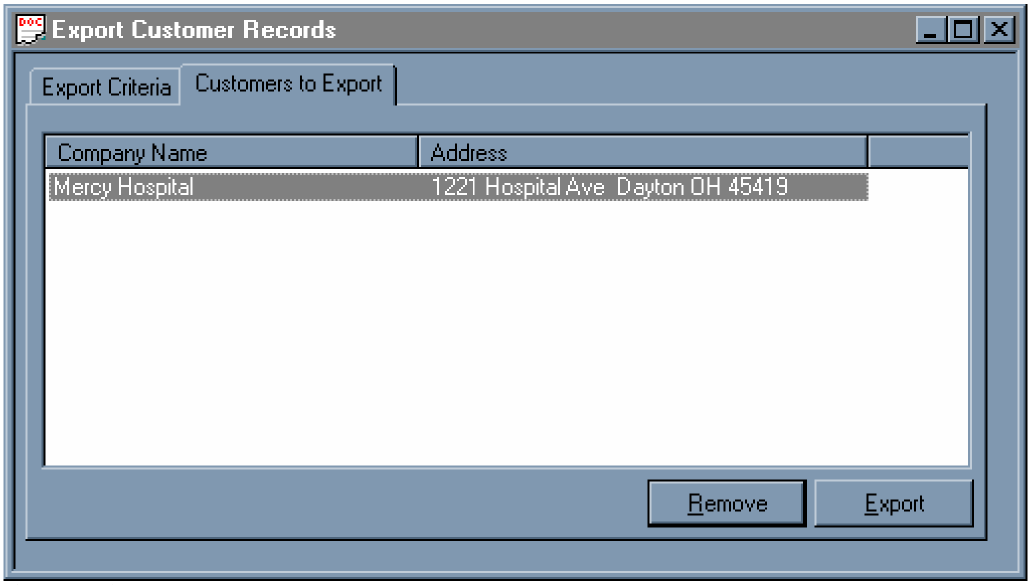


Figure 8 Database Export

When "Import" is selected, Inquest will prompt for a filename to import. Inquest database will then be updated with the customer records in the import file.

Chapter

3

Entering Customer Information

Customer information is the core of any successful business. Inquest allows you to track the most important information related to fire protection and other safety equipment you define. Your company will gain valuable insight into work scheduling and planning through Inquest.

Adding Customers

1. From the "File" menu select the "New…" menu item. Or, press the "New" icon on the toolbar.

2. Select "Customer" in the list box and press the OK button. Or, double-click on "Customer".

A blank customer information form will be displayed. The information contained in this form is described later in this chapter. After entering the pertinent information for the customer being added, save the data to the database by selecting the "Save" menu item from the "File" menu.

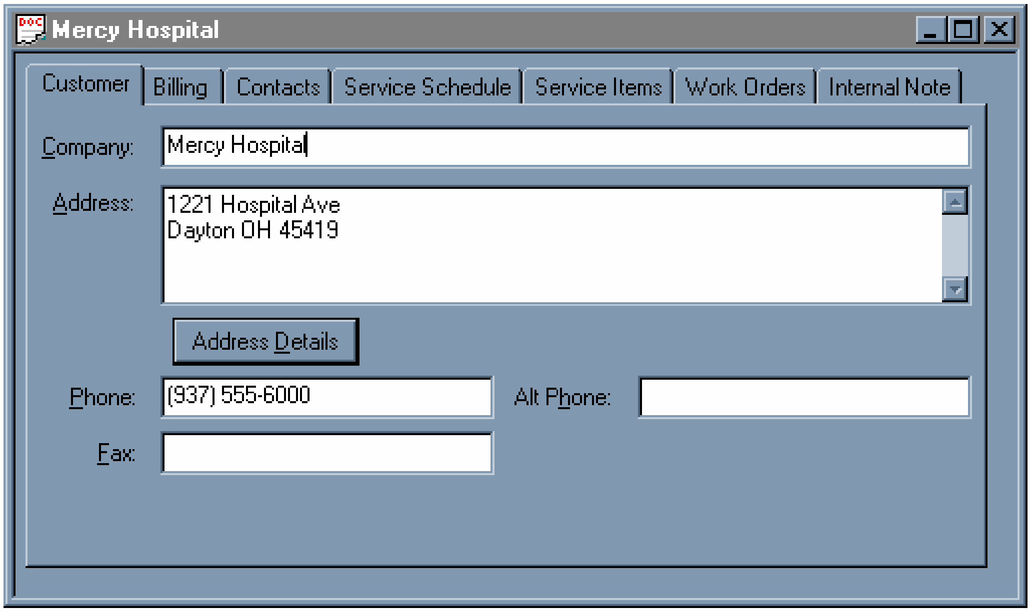


Figure 9 Customer Information

Updating Customers

To open an existing customer record:

1. From the "File" menu select the "Open…" menu item. Or, press the "Open" icon on the toolbar.

2. The "Open" dialog is displayed. There are four options available in the list box to retrieve a list of customers in the database. These options and their instructions for use follow.

Customer by Name

Selecting this option will open a tabbed window listing all customers in alphabetical order. There is a tab for each letter of the alphabet and a catchall "Other" tab for company names that don't start with one of the 26 letters of the alphabet.

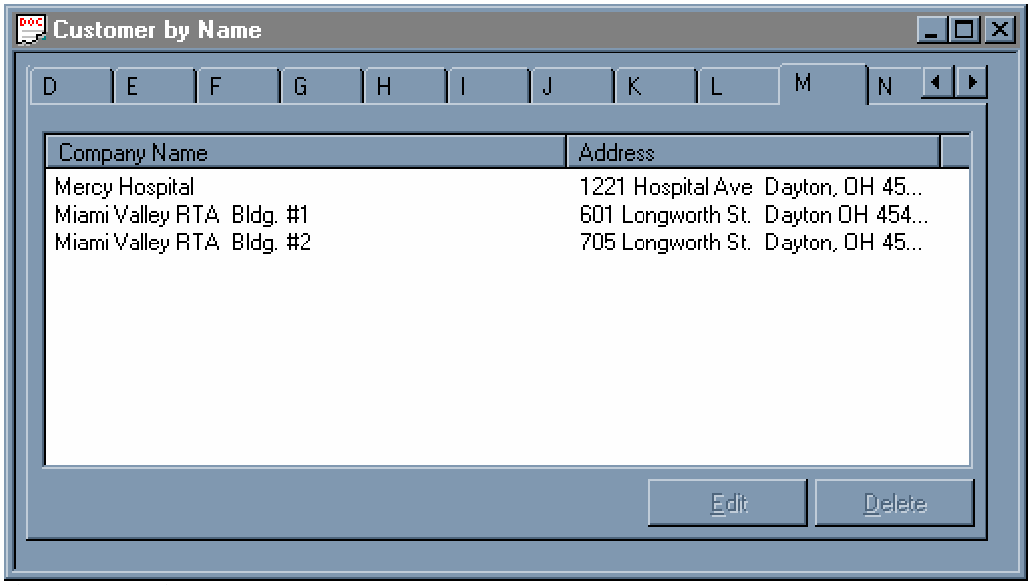


Figure 10 Customer by Name

Customer by Next Service Date

Selecting this option will open a tabbed window listing all customers by their "Next Service" due date. A tab exists for the current month and each of the next 11 future months. A "Past Due" tab lists all customers with service due earlier than the current month, and an "Other" tab lists those customers with a service due more than one year from the current month.

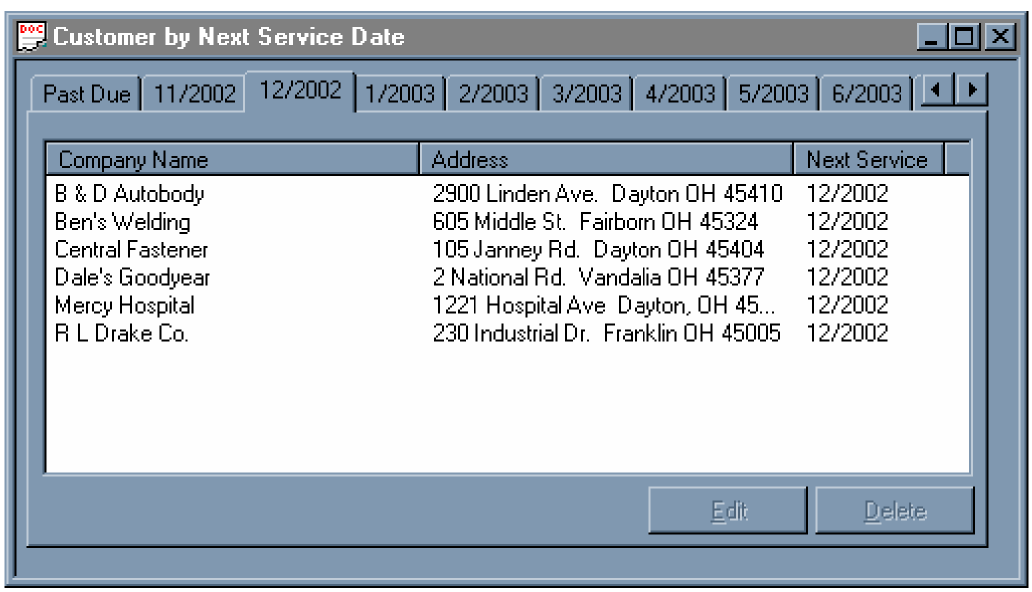


Figure 11 Customer by Next Service Date

Customer Search

Selecting this option will open a window that will allow search criteria to be entered. A search can be conducted on company name, phone number, street address, service technician, route, and service schedule information. Once the search criteria is entered and the "Search" button is pressed, a resulting list of customers that match the given criteria is displayed in the "Results" tab of the window.

Use of wildcard character in searches

When searching on a name or address, use the percent sign '%' as a wildcard. For example, to find all customers on Main Street; enter %Main% for the search criteria.

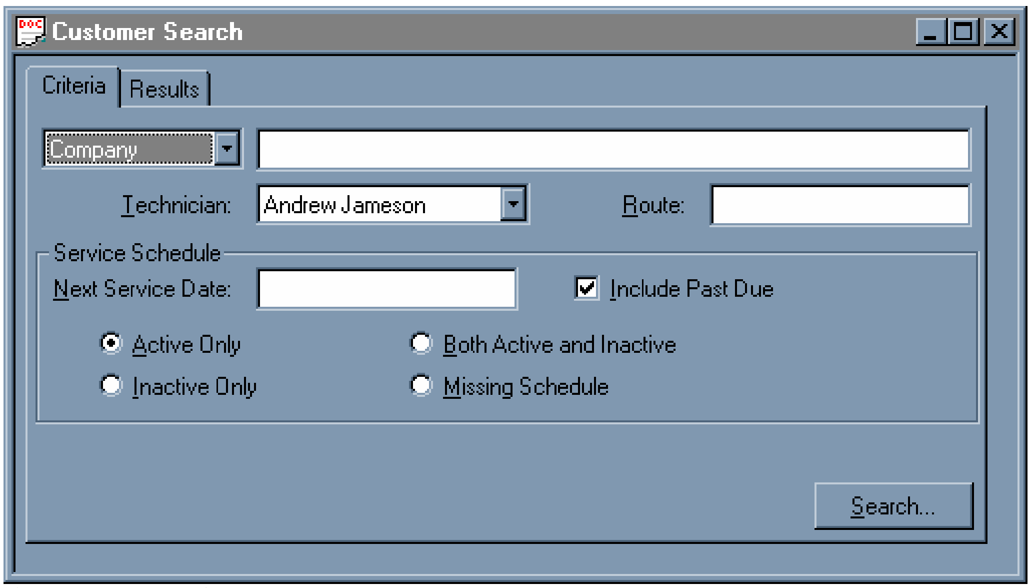


Figure 12 Customer Search

Equipment Search

Selecting this option will open a window that will allow equipment search criteria to be entered. A search can be conducted on a bar code or serial number for an equipment item in Inquest database. Once the search criteria is entered and the "Search" button is pressed, a resulting list of customers that match the given criteria is displayed in the "Results" tab of the window.

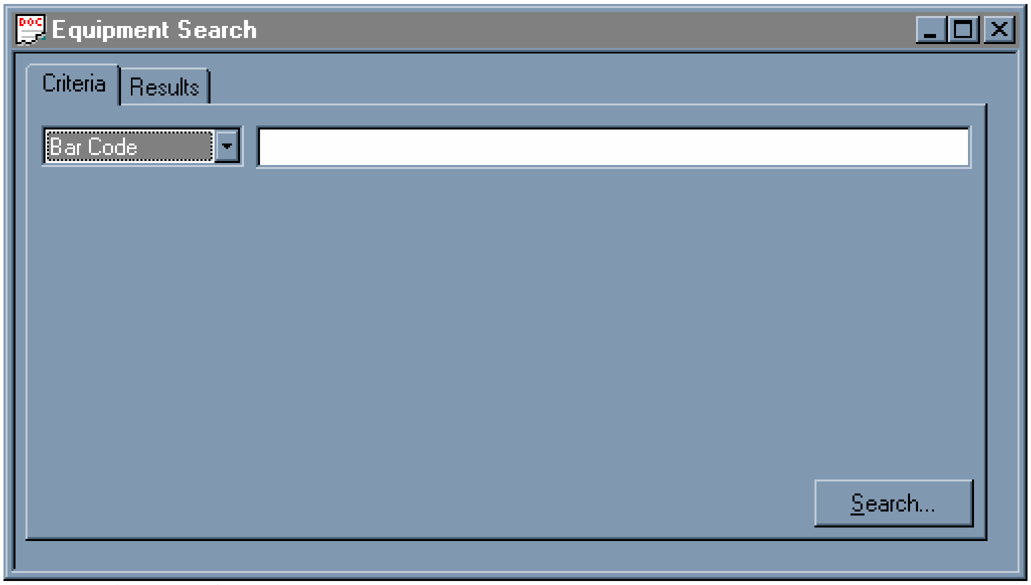


Figure 13 Equipment Search

3. Select a customer from the list and press the "Edit" button. Or, double-click the customer.

The customer information will be displayed. The information contained in this form is described later in this chapter. After updating the pertinent information for the customer, save the data to the database by selecting the "Save" menu item from the "File" menu.

Deleting Customers

To delete a customer, follow the "Updating Customers" instructions to open a list of customers. From the customer list, select the customer to be removed from the database and press the "Delete" button. A confirmation dialog will be displayed indicating that the record will be permanently removed from the database. Pressing the "Yes" button to confirm the delete will immediately remove the customer record from the database. No "Save" action is required.

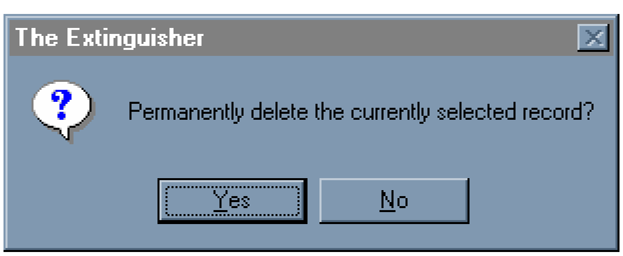


Figure 14 Delete Customer Confirmation

Customer Information

Name and Address

The "Customer" tab contains the most basic information for a customer. This is the address of the service location where the fire protection equipment exists. Company and Address are required fields.

Billing Information

The "Billing" tab is visible if you have installed the optional accounting solution for Inquest. The information contained includes the price list to use when calculating an invoice from a work order, an optional billing address, and the billing account in your accounting software

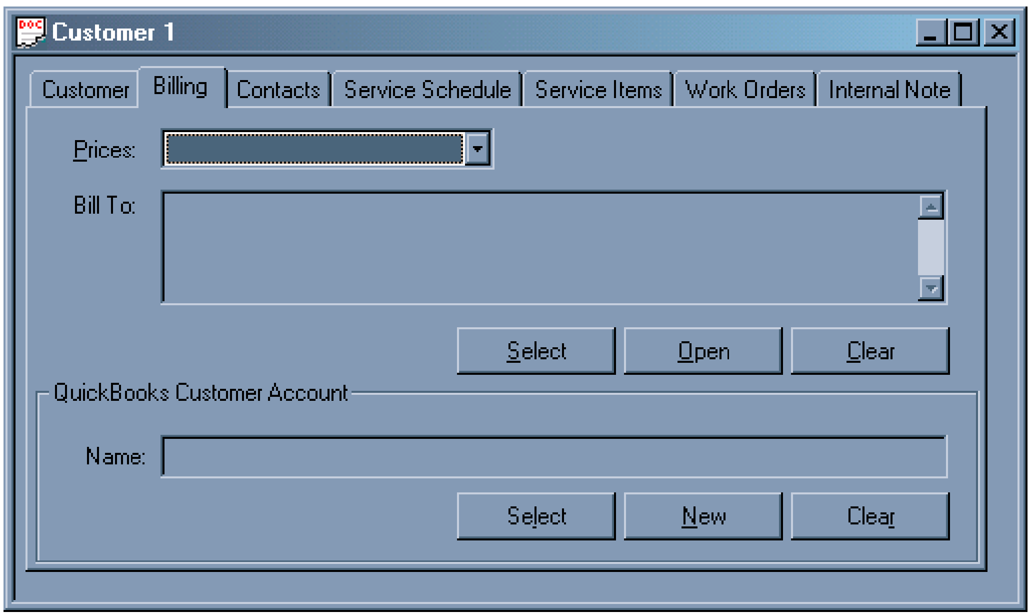


Figure 15 Customer Billing Information

The "Prices" field is only displayed if the connection to your accounting software is available. If the field is blank, the "Standard" price list will be used by default for this customer. See "Price Lists" in Chapter 10 "Customizing Inquest" for more information on setting up additional price lists.

To add a "Bill To" address:

1. If the billing address has not been added, follow the instructions in the next chapter on adding a billing address record to Inquest database.

2. Press the "Select" button to display the available billing addresses.

3. Select the appropriate billing address and press the "OK" button. The billing address is now shown in the protected edit field.

The "Open" button will open the billing address record for editing. Note: any changes will also affect any other customer sites that use the same billing address. The "Clear" button will remove the "Bill To" information for this customer site.

The "QuickBooks Customer Account" area provides the link between customer information in QuickBooks and Inquest.

To link the customer with an existing customer record in QuickBooks:

1. Press the "Select" button to display a list of customers in the QuickBooks database.

2. Select the appropriate customer and press the "OK" button.

The "New" button is used to add the customer information into QuickBooks from Inquest. The "Clear" button is used to break the customer link between QuickBooks and Inquest.

Once a link between a QuickBooks customer and a customer in Inquest is established any common information will be kept synchronized. Double data entry between the two programs is eliminated.

Contacts

The "Contacts" tab shows a list of contacts for the customer. To add contacts, press the "Add" button at the bottom of the screen. Enter the contact information in the "Contact" window. After pressing the "OK" button the window will close and the contact information will appear in the list.

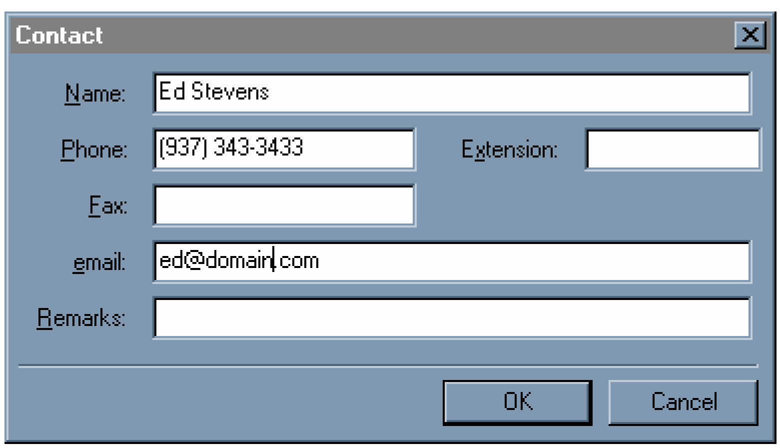


Figure 16 Contact Information

To change the contact information, select the contact to update and press the "Edit" button at the bottom of the screen. Or, double-click the contact name in the list. After updating the pertinent information for the contact press the "OK" button to close the "Contact" window.

To delete a contact, select the contact and press the "Delete" button at the bottom of the screen. After adding, editing, or deleting contacts you must save your changes to the database by pressing the "Save" icon on the toolbar or from the "File" menu select the "Save" option.

Service Schedule

The "Service Schedule" tab shows a list of services scheduled for a customer. The Route field is an optional field used to group customers together by route on the "Service Due" report.

Service schedules are added by pressing the Add button. Each service schedule has its own name. For example, if you had several services scheduled for a customer that were monthly services and others that were annual you could name the monthly schedule "Monthly" and the annual schedule "Annual". Enter the schedule name into the Schedule Name list box. The name will be selectable again for other customers. Another option is to name your schedules based upon the name of the service that will be associated with the schedule. For example, "Fire Extinguishers", "Extinguishers and Lights", etc.

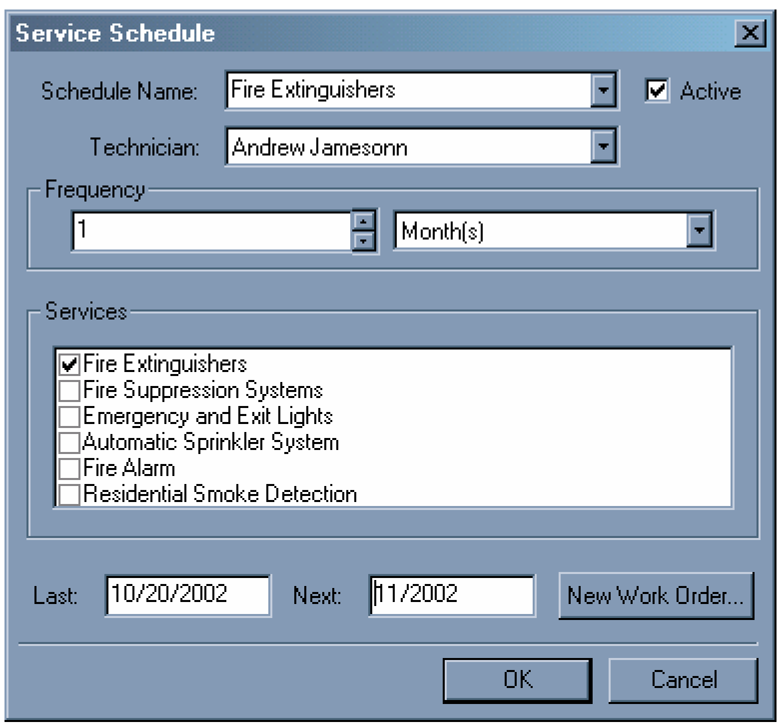


Figure 17 Service Schedule Information

To enter or change schedule information the schedule must be active. To activate a schedule, click the "Active" check box.

The Technician selection list is populated when employees are added and saved to the database. To assign a technician to the Service Schedule scroll through the list box and select the employee.

Select a frequency for the schedule by entering a number in the first frequency field and selecting either years, months, weeks, or days in the second field.

The standard services available are Fire Extinguishers, Fire Suppression Systems, Emergency and Exit Lights, Automatic Sprinkler System and Fire Alarm. More services may be added by selecting "Services" from the "Customize" menu. Select the appropriate services for the Schedule Name and Frequency by placing the cursor over the checkbox and clicking. A check will appear in the box. Enter a date for the last service completed. The format that is accepted by this date field is any valid date including month and year only. After changing the last service date, the next service date will be calculated once the input focus has been placed on the "Next" field. The next service date is determined based upon the last service date and the service frequency that have been entered.

Service Items

The "Service Items" tab will list all service types that exist on a service schedule for the customer. It also shows the last service date for each of the listed services. Service items may be edited by selecting a service from the list and pressing the "Edit" button or double-clicking on the service name. Each "Service Item" has its own values which are described later in this chapter.

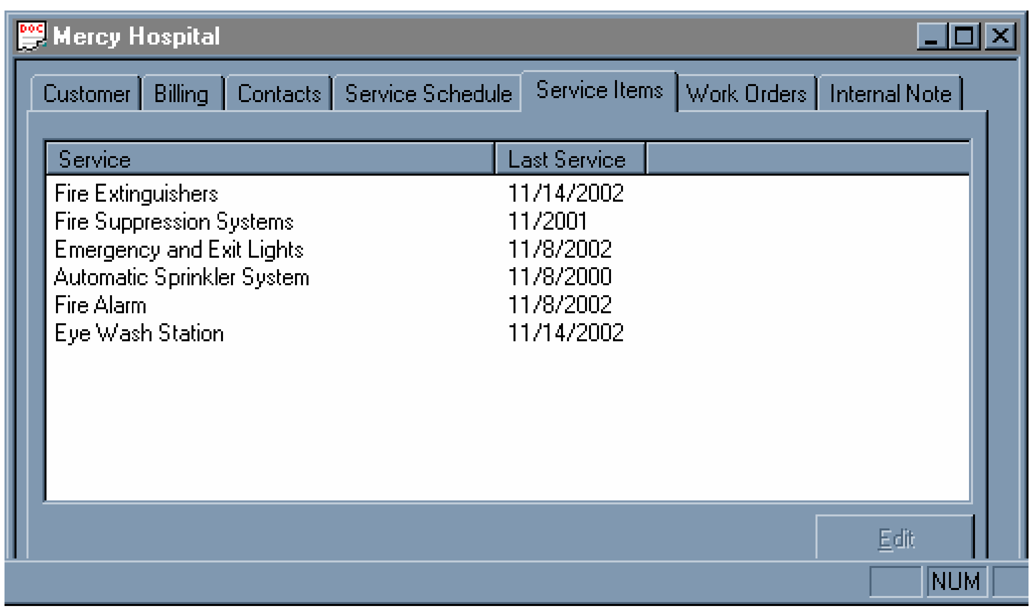


Figure 18 Service Items Tab

Work Orders

The "Work Orders" tab is populated with work orders that have been created and/or completed for the service location. By selecting and opening a work order the work order can be modified or printed. A completed work order will provide details on the work completed for a particular job. With the optional bar coding module any completed jobs will have a date and time indicating when the serviced equipments bar code was scanned.

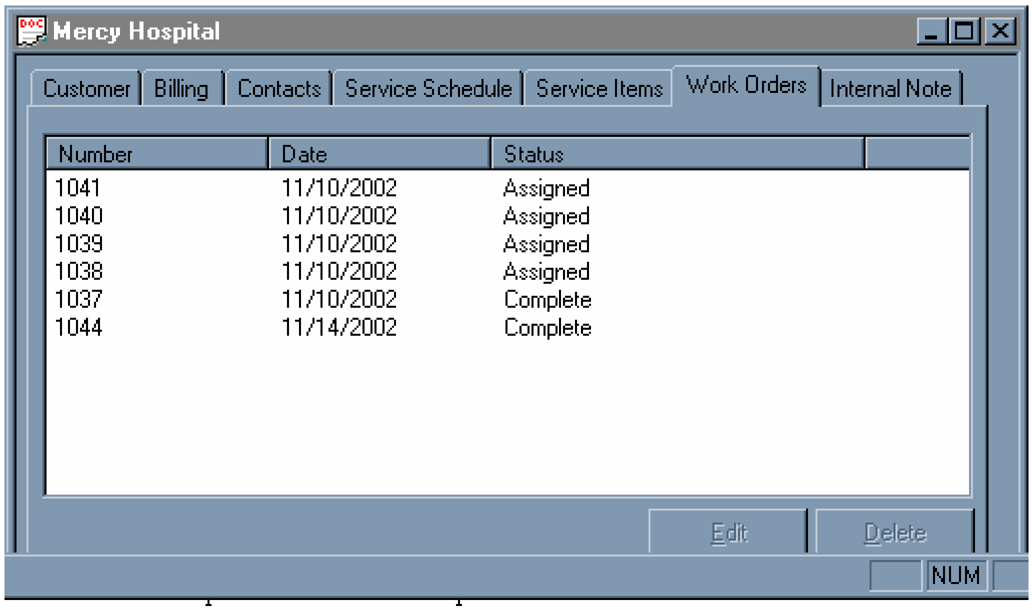


Figure 19 Available Work Orders

Internal Note

The "Internal Note" tab is a free format text field for any additional notes you would like to keep. Each service item maintains a "Remarks" area that will be used on the "Service Records" report. The "Internal Note" tab in the customer form window will not appear on any report.

Service Item Information

Each service item maintains a "Remarks" section that is a free format text field. The text entered in the "Remarks" section is limited to 62,535 characters and will appear on the "Service Records" report for each customer. Each service item maintains data that pertains to the service work performed.

Each service item tracked can have an unlimited number of user defined fields. User defined fields are explained in detail in the chapter "Customizing Inquest".

Fire Extinguishers

A record is kept of each fire extinguisher's location, size, type, hydrostatic test date, 6-year maintenance date, last service date, next service date and serial number. The "Fire Extinguisher" service is also used for fire hose and cylinder/cartridge hydrostatic test dates.

When updating the fire extinguisher information you are presented with a list window. From this window you can add an item to the list, change an item in the list, or delete an item from the list. When adding or changing an item, you are presented with a form window. The first required data is the type equipment, represented by a radio button selection, of fire extinguisher, fire hose, or gas cylinder/cartridge. The remaining form information to be input will change based upon the item type selected.

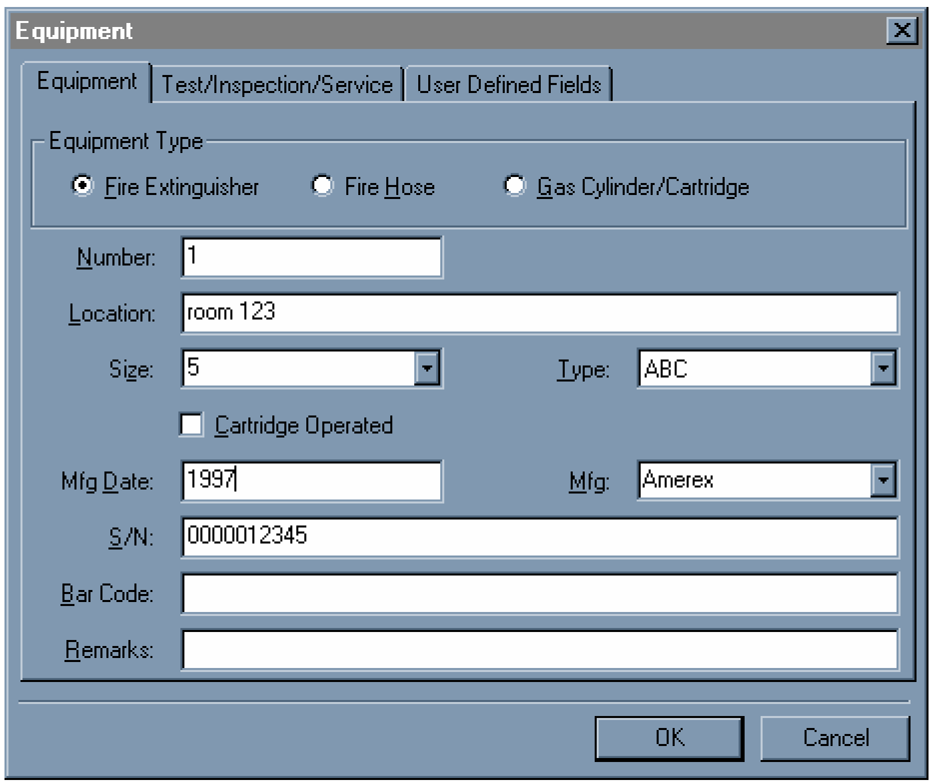


Figure 20 Fire Extinguisher Information

The "Service" tab records the last annual maintenance date for the fire extinguishers. Monthly inspections can be tracked separate from the annual service date by selecting the monthly service "Active" checkbox. See the "Monthly Service" section for more details on this feature.

Fire Suppression Systems

Inquest has the capability to maintain data for multiple fire suppression systems for a customer. The information tracked consists of location, type, manufacture, model, install date, last service date, and various component replacement dates.

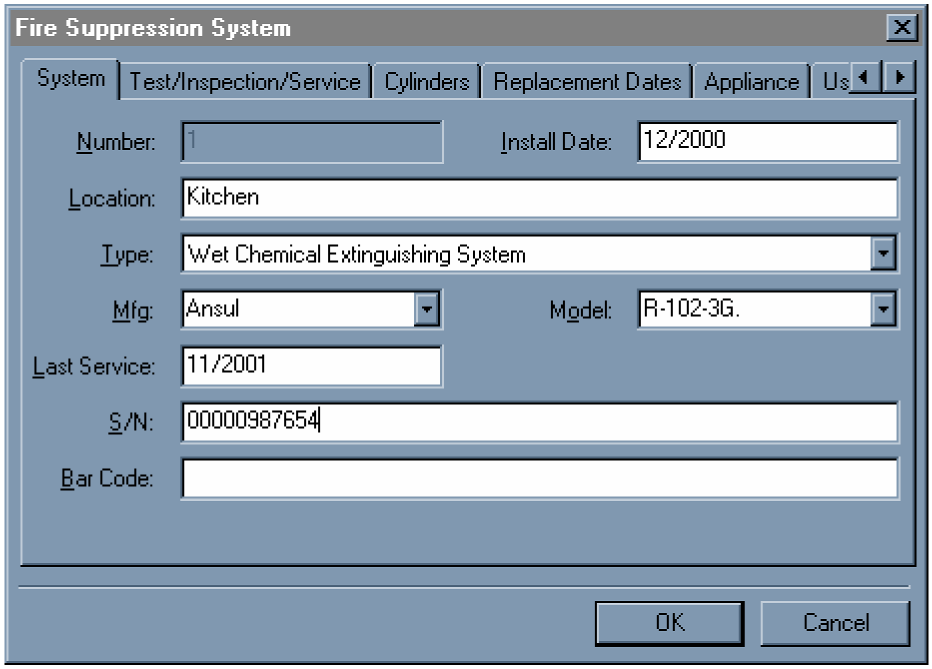


Figure 21 Fire Suppression System Information

The "Tests and Inspections" tab allows you to track any required tests/inspections for the system. A text description, a test frequency and the last date the test/inspection was performed are all tracked. A list of standard tests is added based upon the type of fire suppression system that has been entered. You can also add any number of tests and inspections needed by selecting the "Services…" menu item from the "Customize" menu.

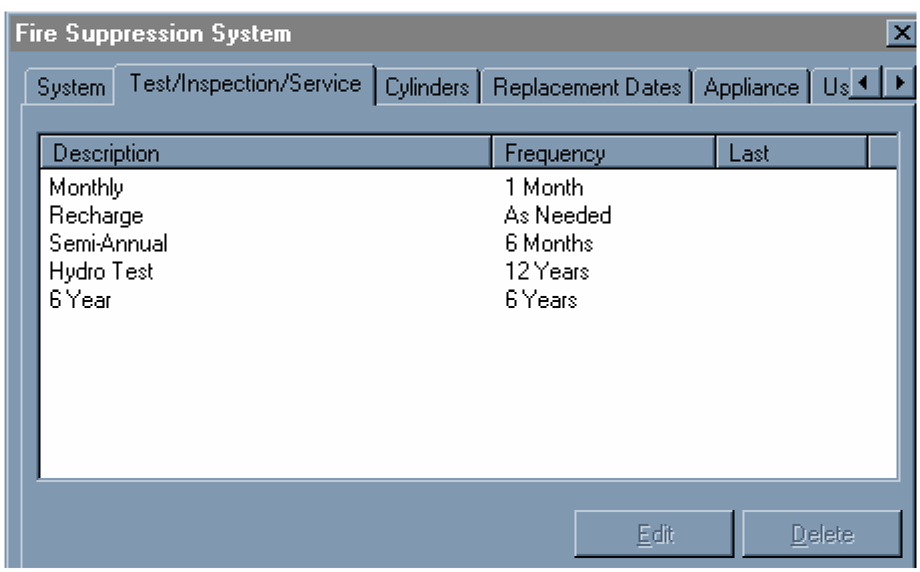


Figure 22 Test/Inspection/Service

The "Cylinders" tab allows you to optionally add a record for each extinguishing agent cylinder as well as each gas cylinder or cartridge.

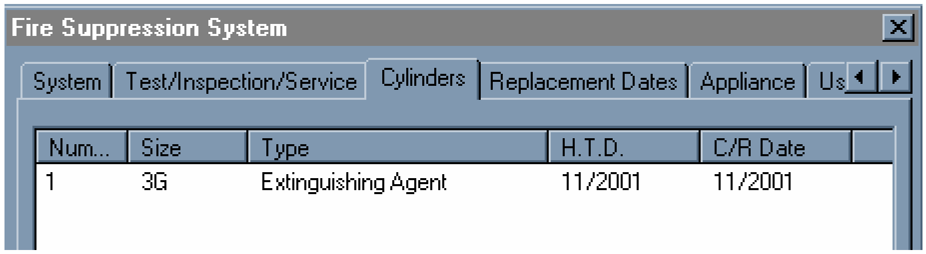


Figure 23 Cylinders

The "Replacement Dates" tab is used to maintain the replacement dates of various system components. These include actuating cartridge, fusible links, and nozzle caps.

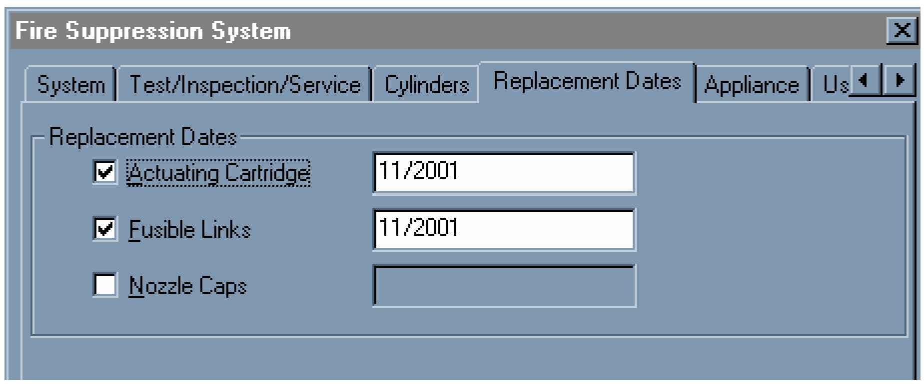


Figure 24 Replacement Dates

The "Appliance" tab will maintain a list of appliances that the system was designed for. When adding an appliance, number them so the list will maintain a left to right order.

Emergency and Exit Lights

The minimum information required is the last service date. You have the option to track as many details as you desire.

The "Lights" tab will allow you to maintain a list of every light to be serviced for the customer. You have the ability to list each light by location and type. Each light can be bar coded and downloaded to the handheld application.

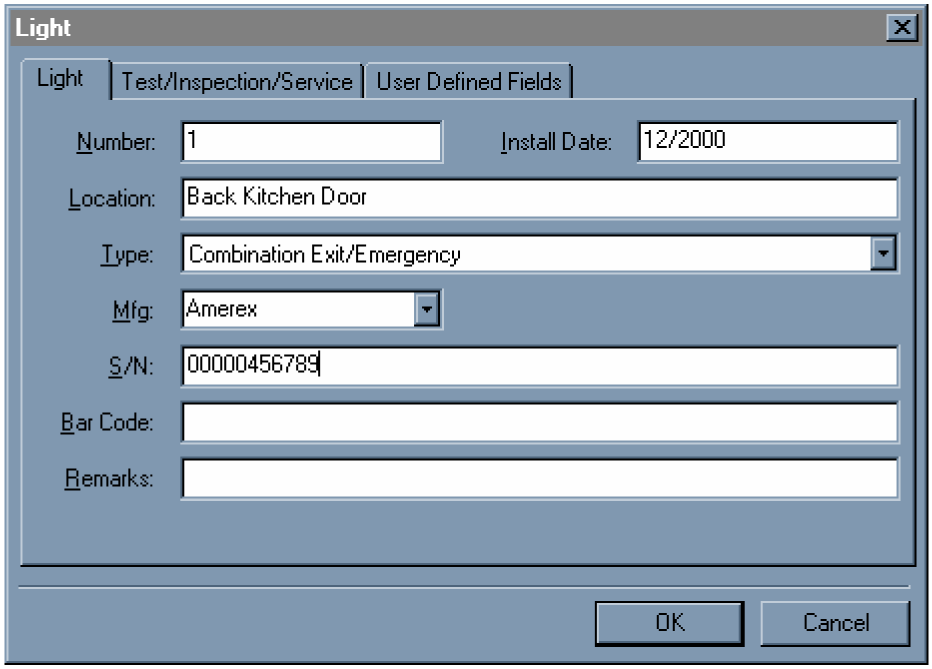


Figure 25 Emergency and Exit Lights

Automatic Sprinkler Systems

The "System" tab is used to indicate the type of sprinkler system, the install date, and the last service date.

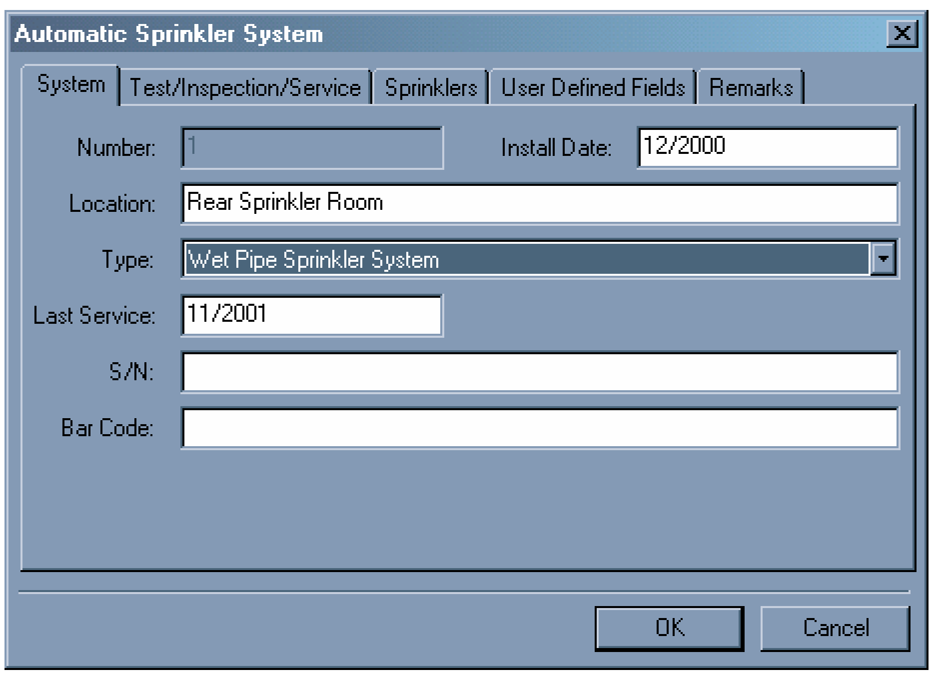


Figure 26 Automatic Sprinkler System

The "Tests and Inspections" tab allows you to track any required tests/inspections for the system. A text description, a test frequency and the last date the test/inspection was performed are all tracked. A list of standard tests is added based upon the type of sprinkler system that has been entered. You can also add any number of tests and inspections needed by selecting the "Services…" menu item from the "Customize" menu.

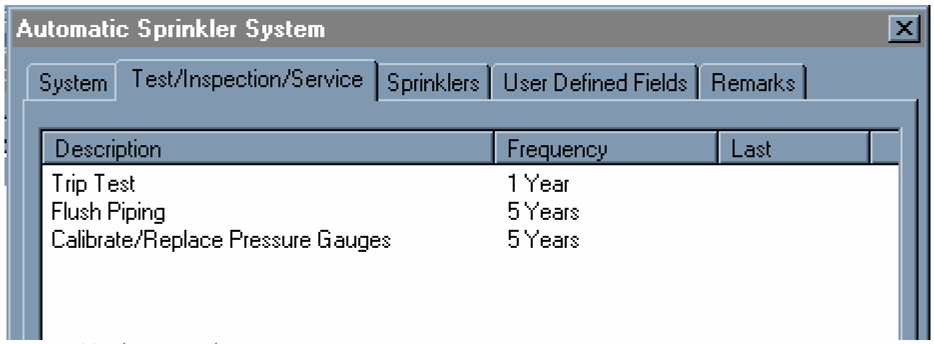


Figure 27 Test/Inspection/Service for Sprinkler Systems

The "Sprinklers" tab allows you to list what type of sprinkler heads are in use at the customer site, how many there are, and the last time a sample of the sprinkler heads were tested.

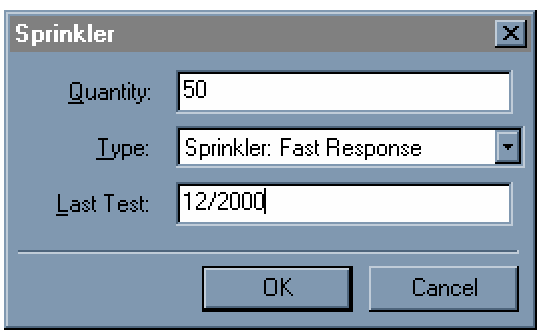


Figure 28 Sprinkler Head Information

Fire Alarms

The information kept for fire alarms includes the manufacture, model, install date, last service date, and the monitoring agency information.

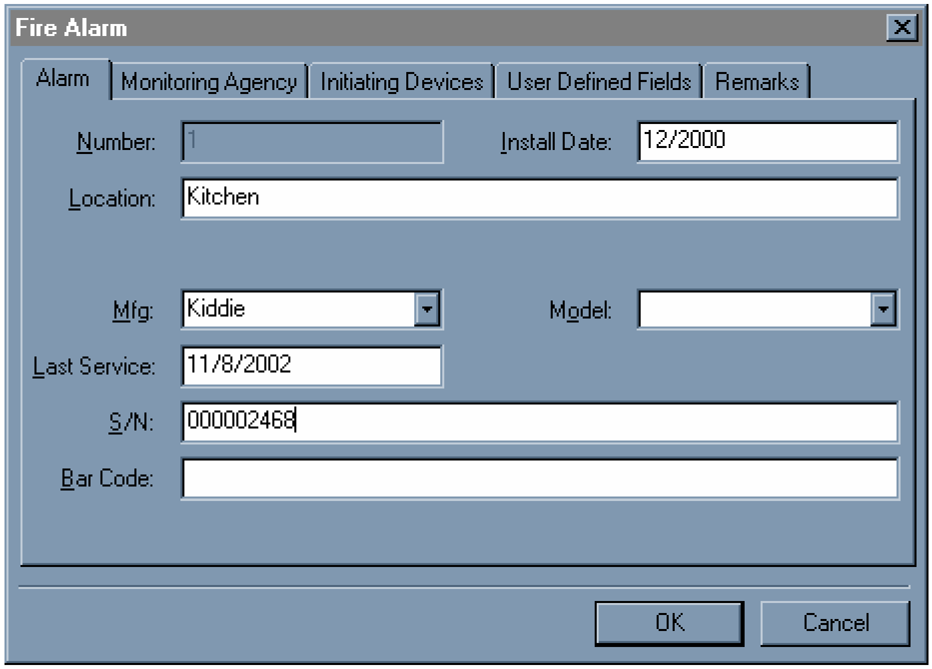


Figure 29 Fire Alarm

The "Initiating Devices" tab provides a list of the type and location of each initiating device for the alarm system. A test/inspection/service date is maintained for each device based upon its type. You can also add any number of tests and inspections needed by selecting the "Services…" menu item from the "Customize" menu. Each initiating device can be bar coded and downloaded to the handheld application.

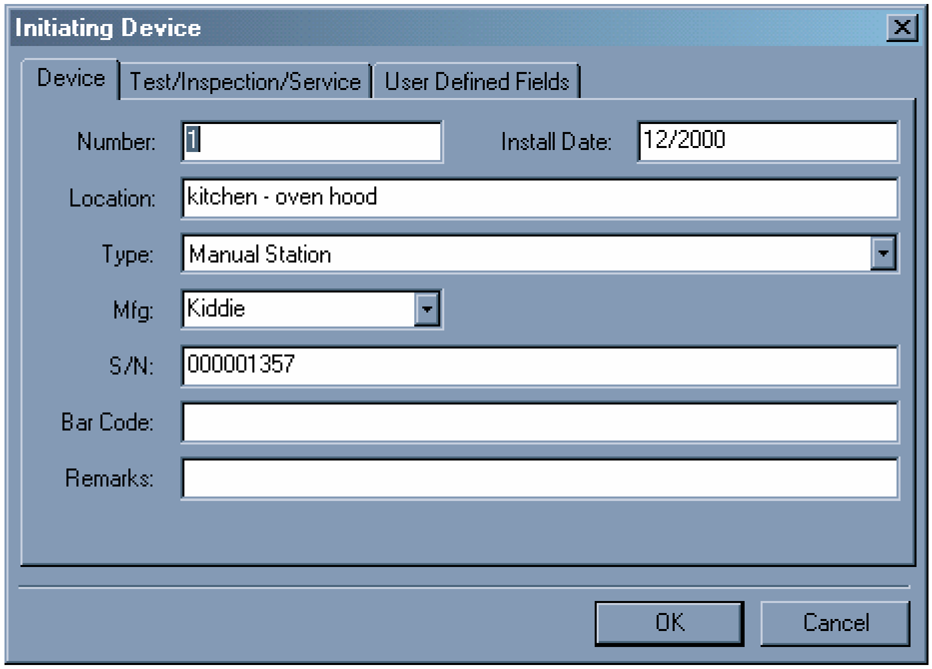


Figure 30 Fire Alarm Initiating Device

User Defined Service Items

The user defined services can be added to a service schedule and tracked by Inquest. You can setup any number of service types to be tracked by Inquest. Each service can have different equipment types and different tests/inspections/services for each. To define your own service and equipment types select the "Services…" menu item from the "Customize" menu. Defining additional service items is covered in detail in the chapter "Customizing Inquest".

Fire Extinguisher Monthly Service

Inquest will track customers that request a monthly inspection of their fire extinguishers between annual service dates.

Service Schedule Setup

The "Service Schedule" is always used to track the next service date. For the fire extinguisher service set the frequency to "1 Month" when doing monthly inspections for a customer.

Only 1 service schedule is necessary. Inquest will determine when the annual service is due by examining the last annual service date on the fire extinguishers when creating a scheduled maintenance work order.

Service Records Report

The fire extinguisher portion of the "Service Records" report will list the required service for each extinguisher and provide a work summary at the end of the report. When monthly service is due all fire extinguishers will indicate that a monthly inspection is required. The summary at the end of the report will summarize the work required at the next ANNUAL service. When annual service is due, the required service for each extinguisher will indicate what type of service is required based upon NFPA-10.

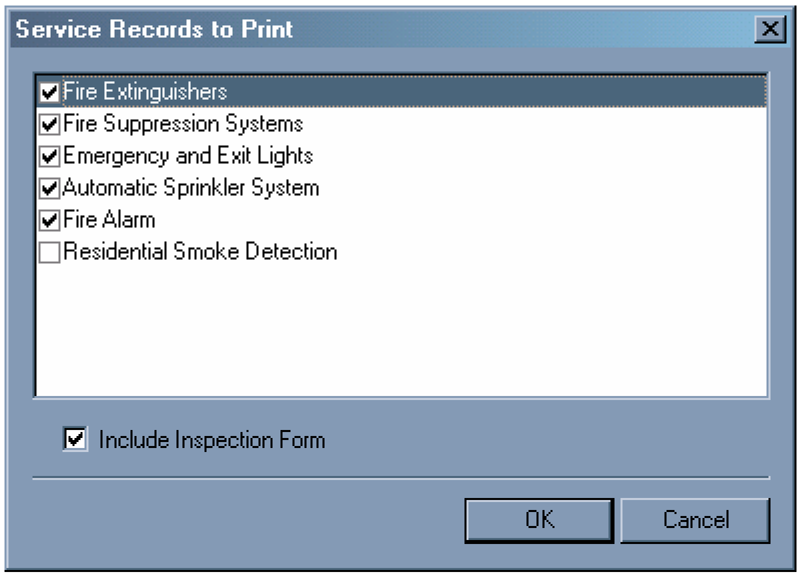


Figure 31 Service Records Report, Service Records to Print

Handheld Application

The handheld application will show if the fire extinguishers were scheduled for a monthly inspection or annual service by using the "Annual" service date for the fire extinguishers. When monthly service is scheduled the "Action" for each extinguisher will be "Monthly" indicating only a monthly inspection is required. When annual service is due the "Action" for each extinguisher will indicate what type of service is required based upon NFPA-10.

Chapter
4

Entering Billing Address Information

With the optional accounting feature, Inquest can maintain a separate billing address. This is only needed when an invoice is to be sent to an address that is different from the customer's job site.

Adding Billing Addresses

1. From the "File" menu select the "New…" menu item. Or, press the "New" icon on the toolbar.

2. Select "Billing Address" in the list box and press the OK button. Or, double-click on "Billing Address".

A blank billing address form will be displayed. The information contained in this form is described later in this chapter. After entering the pertinent information for the billing address being added, save the data to the database by selecting the "Save" menu item from the "File" menu.

Updating Billing Addresses

To open an existing billing address:

1. From the "File" menu, select the "Open…" menu item. Or, press the "Open" icon on the toolbar.

2. The "Open" dialog is displayed. Select the "Billing Address" item and press the "OK" button. Or, double-click the "Billing Address" item.

3. A search can be performed on "Name", "Street Address", or "Phone Number". Enter the information to search on and press the "Search"

button. By not entering any search information a list of all billing address will be retrieved.

4. Select a billing address from the list and press the "Edit" button. Or, double-click the billing address.

The billing address information will be displayed. The information contained in this form is described later in this chapter. After making any changes, save the data to the database by selecting the "Save" menu item from the "File" menu. Any changes will be reflected for all customers that use that particular billing address for invoicing.

Deleting Billing Addresses

To delete a billing address, follow the "Updating Billing Addresses" instructions to open a list of billing addresses. From the displayed list, select the billing address to be removed from the database and press the "Delete" button. A confirmation dialog will be displayed indicating that the record will be permanently removed from the database. Pressing the "Yes" button to confirm the delete will immediately remove the information from the database. No "Save" action is required.

Note: By deleting a billing address, any customer site that was using that address for invoicing will now have any future invoices sent to the site address for that customer.

Billing Address Information

Inquest tracks separate billing addresses to make multiple sites with single billing easy.

Billing Address

The "Billing Address" tab keeps a record of the address and phone number where customer invoices are to be sent. This is only needed if the billing address is different from the site address.

Chapter
5

Work Orders

Work Orders are used by Inquest to assign specific service items to a technician. The accounting solution requires a work order to produce an invoice within the QuickBooks application. The mobile computing solution also uses work orders to provide the link between the technicians handheld and the office computer running Inquest.

Adding Work Orders

A work order is created based on the service schedule of a customer account.

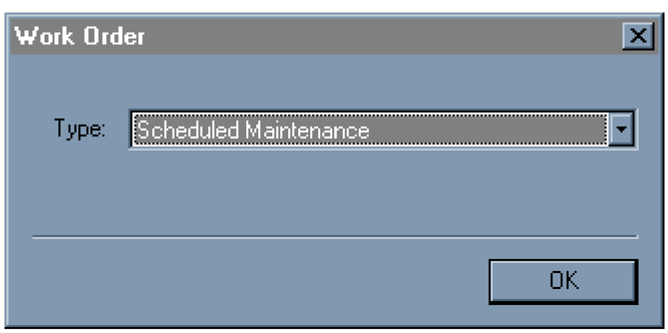
Manually Requesting Work Orders

To create work orders for a specific service location follow these instructions.

1. Open a customer account and click on the “Service Schedule” tab.

2. Select the appropriate service schedule based upon which service work is due. Click the “Edit” button.

3. Click the “New Work Order…” button at the bottom of the “Service Schedule” window.



4. A window will open to indicate what type of work order is being created. The types of work orders and their meaning are:

- Scheduled Maintenance – the work requested is preventative maintenance and the "Next Service" date will be updated once the work order has been completed.

- Service Call – the work requested is to correct a problem with piece of equipment. The "Next Service" date is not updated when a "Service Call" work order is completed.

5. A confirmation message will display indicating that a work order has been successfully created.

Automatically Requesting Work Orders

Inquest can create scheduled maintenance work orders for all service schedules that are due in a given month. To generate the work orders follow these instructions.

1. From the "Handhelds" menu select the "Work Orders…" submenu and select the "Generate" menu option.

2. In the displayed window enter the month and year for the scheduled maintenance work orders to be created.

3. Any past due schedules can be included by checking the "Include Past Due" check box. Note: A duplicate work order will not be created for any service schedules that already have an open work.

4. Click the "Start" button. The work orders will be automatically created. The progress will be shown and the total number of work orders that were created will be displayed.

Modifying Work Orders

A work order can be opened from the "Work Orders" tab of the customer account, or from the "File…Open" menu option.

Open a work order from the customer account by following these steps.

1. Open a customer account and click on the "Work Orders" tab.

2. Select the appropriate work order in the list and click the "Edit" button.

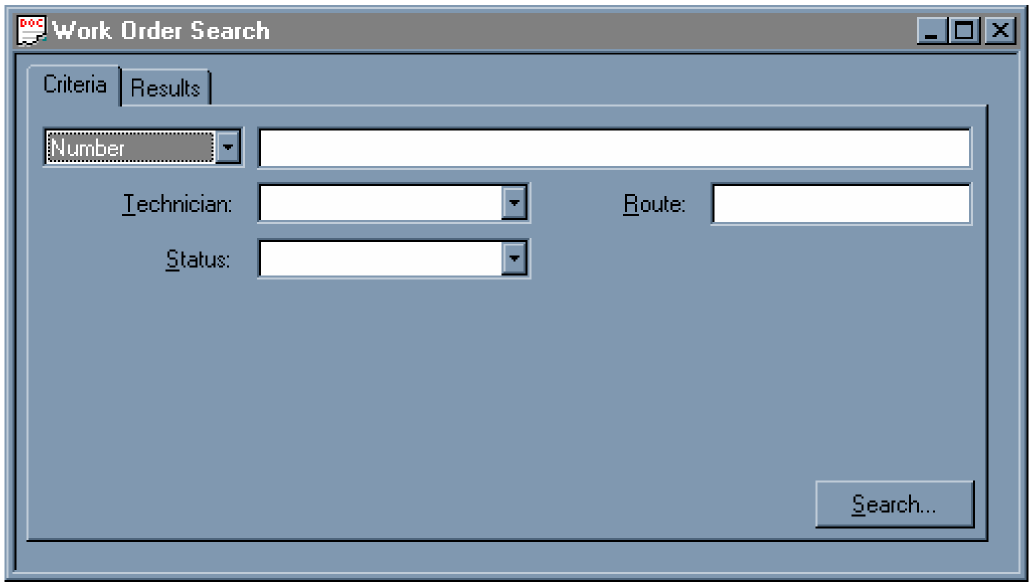
Open a work order from the "File…Open" menu option by following these steps.

1. From the "File" menu select the "Open…" menu item. Or, press the "Open" icon on the toolbar.

2. The "Open" dialog is displayed. Select the "Work Order" option in the list and click the "OK" button.

Work Order Search

Selecting the "Work Order" option in the "Open" dialog will open a window that will allow search criteria to be entered. A search can be conducted on name, phone number, street address, work order number, or work order date. Other search criteria that is available includes service technician, route, and work order status. Once the search criteria is entered and the "Search" button is pressed, a resulting list of work orders that match the given criteria is displayed in the "Results" tab of the window.



Work Order Information

Work Order

The "Work Order" tab contains general information about the work order. The modifiable fields are Number, Date, Type, Start Date, and End Date. The status field indicates if the work order has been assigned or completed. The address fields come from the customer account that this work order was created for.

Technicians

The "Technicians" tab lists the service techs that have been assigned to complete this work order. Multiple technicians can be assigned by clicking the "Add" button. To remove a technician from the work order; highlight their name and click the "Delete" button.

Additional Information

The "Additional Information" tab is a free format notes area that will appear on the work order cover sheet when printed or in the "Notes" area for the work order when downloaded to the handheld. This field is used to provide information to the service technician in the field.

Service Details

The "Service Details" tab shows the services that this work order is being created for. From the equipment information stored in Inquest database you will be able to determine what type service is required. With the accounting solution, this service information will be used to generate an invoice from the work order and it also provides for an inventory of parts used while servicing a piece of equipment.

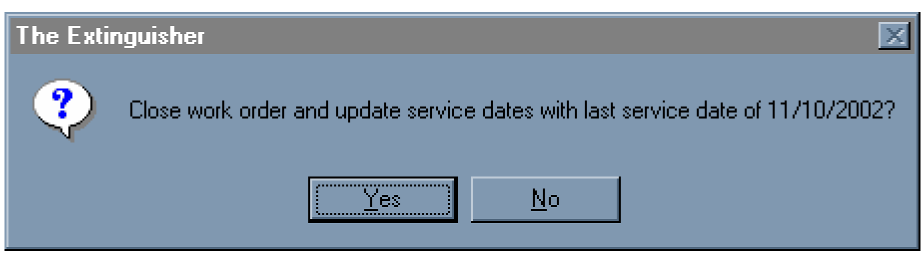
Invoice

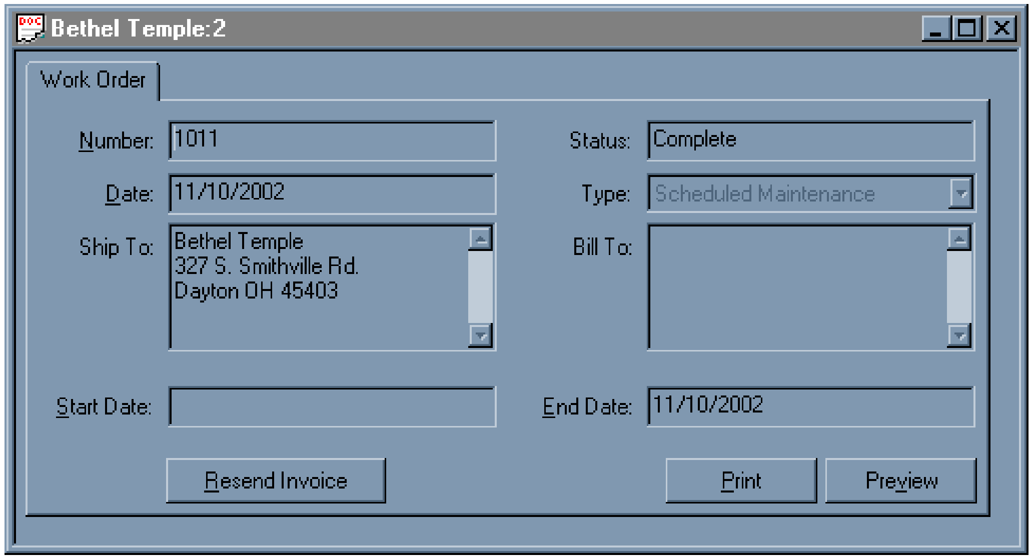
The "Invoice" tab is displayed when the accounting solution has been installed and the link to QuickBooks has been established. By pressing the "Calculate Invoice" button. The service actions performed and the parts used as listed in the "Service Details" tab are tallied and entered into the invoice line items. Additional lines can be added and existing lines can be modified to produce an accurate invoice.

Completing a Work Order

Once the service work is completed and the work order "Service Details" has been updated; the work order should be updated to a "Complete" status. When completing a work order the service records are updated to reflect the service work performed and the invoice information is sent to QuickBooks.

Complete the work order by clicking the "Complete Work Order" button. A confirmation message will be displayed showing the "End Date" from the work order that will be used to update the equipment service dates.





From Work Order to Invoice

By completing the work order the invoice information will be sent to QuickBooks. This will occur automatically during the HotSync of a completed work order from the handheld.

The invoice information can be resent to QuickBooks by clicking the "Resend Invoice" button on a completed work order.

Chapter

6

Entering Employee Information

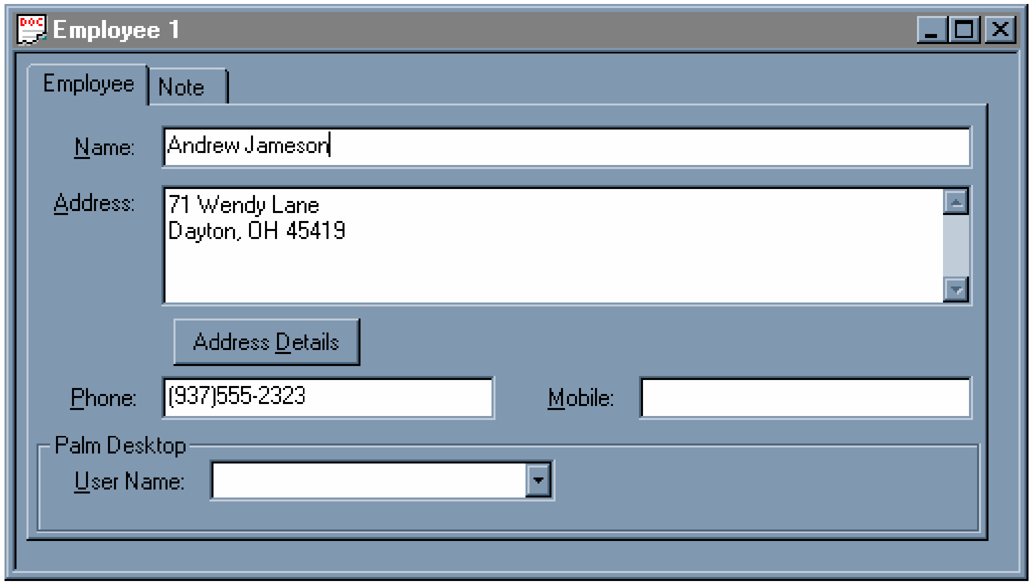
Employee information can be maintained by Inquest. By keeping employee records in Inquest database every customer account can have an assigned service technician. The handheld and bar coding solution requires employee records.

Adding Employees

1. From the "File" menu select the "New…" menu item. Or, press the "New" icon on the toolbar.

2. Select "Employee" in the list box and press the OK button. Or, double-click on "Employee".

A blank employee information form will be displayed. The information contained in this form is described later in this chapter. After entering the pertinent information for the employee being added, save the data to the database by selecting the "Save" menu item from the "File" menu.



Updating Employees

To open an existing employee record:

1. From the “File” menu, select the “Open…” menu item. Or, press the “Open” icon on the toolbar.

2. The “Open” dialog is displayed. Select the “Employee” item and press the “OK” button. Or, double-click the “Employee” item.

3. Enter the beginning of an employee name to search on or leave the name field blank to retrieve a list of all employees in the database. Press the “Search” button.

4. Select an employee from the list and press the “Edit” button. Or, double-click the employee.

The employee information will be displayed. The information contained in this form is described later in this chapter. After updating the pertinent information for the employee, save the data to the database by selecting the “Save” menu item from the “File” menu.

Deleting Employees

To delete an employee, follow the “Updating Employees” instructions to open a list of employees. From the employee list, select the employee to be removed from the database and press the “Delete” button. A confirmation dialog will be displayed indicating that the record will be permanently removed from the database. Pressing the "Yes" button to confirm the delete will immediately remove the employee record from the database. No "Save" action is required.

Employee Information

Inquest can maintain a list of all service technicians in your company. Employee records are required to use the optional mobile computing feature.

Inquest also has the ability to associate a technician with a particular customer service schedule. Using this feature will give you the ability to print a "Service Due" report for each technician and automatically assign any new work orders for a customer to that particular technician.

Employee

The "Employee" tab keeps a record of a service technicians name and address. The only required data is the employee name.

Handheld Information

To use the mobile computing feature of Inquest, an employee record must be associated with a "User" in the Palm Desktop Software. A combo box containing all the Palm Desktop Users is available for this purpose on the "Employee" tab.

Inquest will only allow one employee to be associated with a particular "Palm Desktop User". Inquest will not allow a "Palm Desktop User" association to be changed if there are any outstanding jobs on the handheld computer.

Note

The "Note" tab is a free format text field. The text entered is limited to 62,535 characters.

Chapter

7

Printing Reports

Inquest creates reports to help you manage your business in an efficient manner. Starting with version 4.2, Inquest uses Crystal Reports for the report layout and printing.

Report Templates

The Crystal Report templates that are installed with Inquest can be found in the "Reports" folder of the install directory.

To change the report template used for printing:

1. From the "Customize" menu select the "Reports" menu option.

2. In the displayed window, select the report to switch the template.

3. Click the "Edit" button.

4. Change the template name in the 'Report" field and click "OK"

Selecting a Report

To print reports, from the "File" menu select the "Reports" menu item.

A list of available reports is displayed. Select the report to produce and press the "OK" button or double-click the report name.

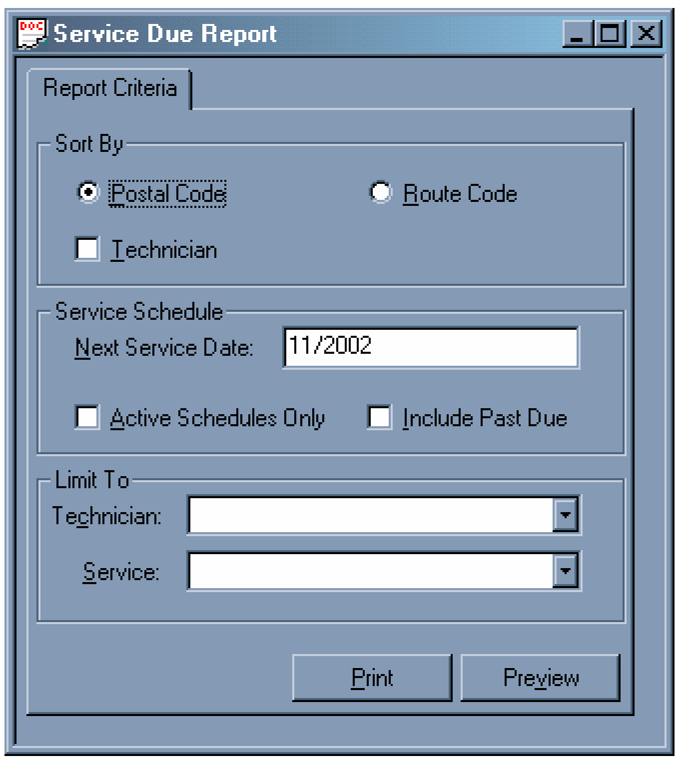
After selecting the report to print/preview a window will open prompting you for information needed to create the report. The report criteria are specific to each report and are described later in this chapter.

Service Due

The service due report is used to assist in efficient routing of service personnel. The only required information is the "Next Service Date".

The following criteria can be entered to get the report as narrow or broad as you like:

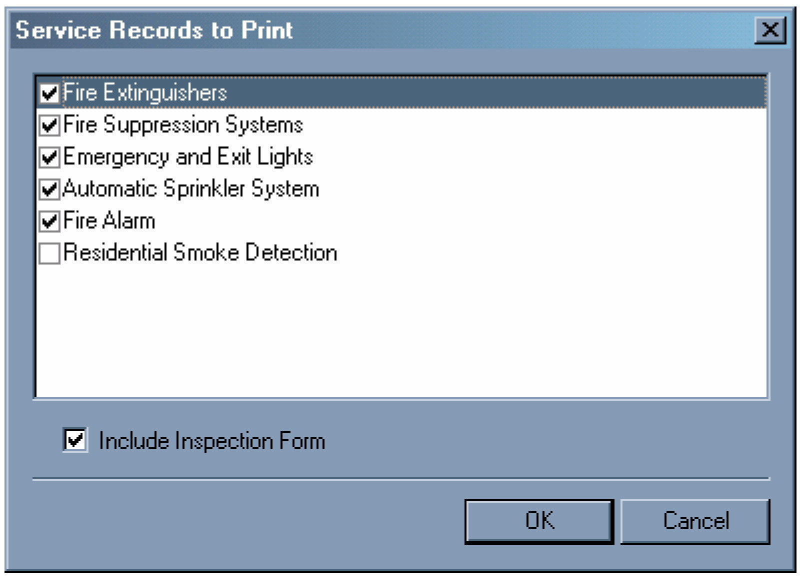
1. Sort by "Route Code" or "Postal Code".
2. Group by "Service Technician" that has been assigned to a particular service schedule.
3. Service schedule information can be reported for a given month with the option to include only "Active" schedules. An additional option is the ability to include all "Past Due" schedules.
4. Limit the report to a specific service technician, service type, and/or route code.



Service Records

The service records report prints the service items for a particular customer. A customer search window will open allowing you to produce a list of customers to print. Individual customers can be removed from the print list by selecting the customer name and pressing the "Remove" button. This action does not delete the customer record; it only removes the customer from the printout to be produced.

Once the customers to be printed are submitted you will be prompted with a list of service records to be included. These include Fire Extinguishers, Fire Suppression Systems, Emergency and Exit Lights, Automatic Sprinkler System, Fire Alarm, and any other service that has been added through the "Customize…Services" menu option.



By opening a particular customer and selecting the "File" menu "Print" option the "Service Records" report will print for that customer.

Work Orders

The work order is the most common template customized. Inquest comes with several templates for printing work orders. The following graphics show the more common work order templates.

<< Your Company Name Here >>

<< Your Company Street Address >>
<< Anytown >>, NC 27502

Phone: (919)555-0000

Work Order
No. 1002
9/12/2007
Scheduled Maintenance

Ship To:
A - 1 Machine & Grinding
38 McReynolds St.
Dayton OH 45403

(937)254-2666

Bill To:

PO Number	Start Date	End Date	Terms	Contact	Technician
				John/Jim	

QTY	DESCRIPTION	PRICE	AMOUNT
1	Annual:ABC		
4	Hydro Test:9.5 ABC		
4	Recharge:9.5 ABC		
		SUBTOTAL	
		TAX	
		TOTAL	

Authorized by　　　　Date

Figure 32 Work Order Template - RptWO.rpt

<< Your Company Name Here >>
<< Your Company Street Address >>
<< Anytown >>, NC 27502

(919)555-0000

Work Order
No. 1002
Scheduled Maintenance

Job Location	Bill To	Phone	Date
A - 1 Machine & Grinding 38 McReynolds St. Dayton OH 45403		(937)254-2666	9/12/2007

Contact	Technician	Start Date	Customer #
John/Jim			

QUANTITY	DESCRIPTION	PRICE	AMOUNT
1	Annual:ABC	0.00	0.00
4	Hydro Test:9.5 ABC	0.00	0.00
4	Recharge:9.5 ABC	0.00	0.00

DESCRIPTION OF WORK

TOTAL

Signature:

Figure 33 Work Order Template - RptWO2.rpt

<< Your Company Name Here >> **Work Order Form** Page 1 of 1

Customer	Location	Work Order #
	A - 1 Machine & Grinding 38 McReynolds St. Dayton OH 45403	1002 **Start Date:** **End Date:**
PH1: (937)254-2666 **PH2:** **Route:**	**Contact:** John/Jim	**Technician:**

PO Number:

QTY	DESCRIPTION
1	Annual:ABC
4	Hydro Test:9.5 ABC
4	Recharge:9.5 ABC

Notes:

Figure 34 Work Order Template - RptWO_Triangle.rpt

Other work order templates available are:

1. RptWO_Signature.rpt – this template will print a signature captured on the handheld device on a completed work order.

2. RptWO_MSF.rpt – this template will is based upon the template in figure 33 but will expand the "Contacts" field for additional printing space.

Chapter

8

Inquest Bar Coding Solution

Inquest supports bar coding of fire and safety equipment with either Windows Mobile or Palm OS based handheld computers. This chapter describes the desktop portion of the solution and how Inquest integrates with the handheld computer.

Handheld Computer

Inquest handheld application can be used on any device supporting Palm OS 3.1 or later or Windows Mobile handhelds utilizing the Microsoft .NET Compact Framework. To use the bar coding feature, a handheld computer with a bar code scanner is required.

For details on using the Palm OS portion of Inquest, see "Chapter 9 Inquest Handheld Application for Palm OS". For details on using the Windows Mobile portion of Inquest see "Chapter 10 Inquest Handheld Application for Windows Mobile".

Work Order Assignment

The workflow begins by assigning a work order to a technician. Open the "Handhelds" menu and select the "Work Orders" submenu and the "Assignment" menu item.

The work order assignment window will open. The work order assignment window is divided into three sections.

The left section of the window displays the open work orders that can be assigned to a technician. The work orders can be viewed and sorted by different criteria.

The right section shows the current technician and work day along with service types that are to be installed onto the technician's handheld computer.

The middle section will show the work orders that have been assigned to the currently selected technician.

Displaying Assigned Work Orders

To display work orders assigned to a technician:

1. Select a technician name in the drop down list in the technician panel.

2. Pick the date of interest in the calendar by selecting a particular day.

The middle section will display any work orders that have been assigned on that particular day. To see all work orders that have been assigned regardless of start date check the "Show all work orders" checkbox.

Assigning Work Orders

To assign a work order to a technician:

1. In the left panel click on the work order to be assigned and hold the mouse button down.

2. While holding the mouse button down, drag the work order over to the middle section.

3. The position where the work order will be placed when the mouse button is released will begin to display in the middle section as you drag the mouse over the panel.

4. By releasing the mouse button in the middle panel the displayed technician will be added to the assigned technician list for the work order and the start date will be updated to the currently selected date in the calendar.

5. The work order will be downloaded to the handheld computer on or before the work order start date depending on how many days in advance you want to download work orders. This setting is described in the "HotSync (Upload/Download)" section later in this chapter.

Removing Assigned Work Orders

A technician can be removed from a work order assignment.

1. Display the work orders that are assigned to the technician as previously described.

2. Right click on the assigned work order in the middle panel.

3. A popup menu will display. Select the "Remove" menu option.

If the job was already downloaded to the handheld computer it will be removed during the next HotSync operation. Note: if the removed job is marked "Complete" on the handheld it is still uploaded to the PC and any updates will be stored in the database during the next HotSync operation.

Work Order Display Options

The work orders available for assignment can be sorted and filtered out by specifying display options. To change the display options:

1. Right click on the left panel where the available work orders are listed to display a popup menu.

2. Select the "Options" menu item in the popup menu.

3. In the displayed dialog box select the sort option and/or any filtering options to show only the work orders you are interested in. The work orders can be sorted by name, route code, or postal code. They can also be limited by start date, technician, and service type.

4. After changing any options click the "OK" button and the work order list will be rebuilt based upon the new options selected.

The last options used will remain until they are changed again by using the same procedure.

Exporting Routing Information

Inquest can export the address of the customers that have been assigned into a format that can be imported into mapping software such as Microsoft Streets & Trips. To create the export file follow these steps

1. Right click on the center panel where the assigned work orders are displayed.

2. Select the "Route…" menu item in the popup menu.

3. Select a location for the export file and enter a filename.

4. Press the "Save" button.

To import the file into Microsoft Streets & Trips follow these steps:

1. Open Microsoft Streets & Trips.

2. From the "File" menu select "Import Data".

3. Change the "Files of Type" option to "Text Files".

4. Open the file exported from Inquest.

5. In the displayed window select "Comma" as the separator character and click the "Next" button.

6. Check the "First row contains column headings" checkbox and click the "Finish" button.

The imported address will be displayed as "pushpins" on the map. The locations can be added to a route. The route can be optimized and have any start and finish point needed including your business address. See the Microsoft Streets & Trips documentation for further details.

HotSync (Upload/Download)

See "Handheld Setup in Chapter 1" for details on setting up Inquest HotSync conduit.

To perform a HotSync operation, place the Palm OS device in the HotSync cradle and press the HotSync button. Assigned and completed jobs will be synchronized between Inquest desktop application and handheld application.

Download

The start date of the work order will determine when it is downloaded to the handheld computer. The number of days in advance to download a work order is specified by following these instructions:

1. Open the "Options" dialog from the "Customize" menu and selecting the "Options..." menu item.

2. Select the "Work Order Assignment" tab.

3. In the "HotSync Work Orders" section specify the number of days in advance to download the assigned work orders.

For example, a zero indicates that the work orders will be downloaded on the actual start date, while a value of one will have the assigned work orders downloaded the day before the start date.

Upload

Work orders on the handheld that have been marked "Complete" will be uploaded to the PC and update Inquest database during the next HotSync operation.

Assigning Multiple Technicians

Multiple technicians can be assigned to a single work order. Each technician will receive a complete list of the equipment needing to be serviced at the specified location. After completing the work order only those records updated by a technician will be updated on the desktop database. The work order will remain open until all the handhelds have completed the HotSync operation.

Location Codes

To assist in entering location information, Inquest can print a report of bar coded location descriptions.

From the "Handhelds" menu select the "Location Codes…" option. Categories of location codes can be added and removed to the list window displayed. Each category can have many associated values that will be printed on a report for the service technicians to use in the field.

Inquest as a default creates a "General Location Values" category. This category contains general location descriptions such as "FRONT", "BACK", "N", "S", "E", "W", etc. Categories can be added for specific job types that your service technicians visit. Possible categories are "Hospital", "Retail Store", or "Warehouse".

By selecting the "Print" option from the "File" menu the location code report can be printed.

Chapter

9

Inquest Handheld Application for Palm OS

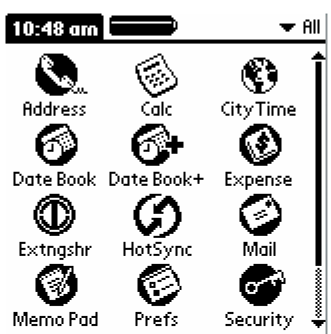
Inquest has a software application that can be used on the job site by service personnel. Inquest handheld application for the Palm OS can be used on any handheld device that supports Palm OS 3.1 or later. The bar coding feature requires a handheld unit with a compatible bar code reader.

Handheld Setup

For details on setting up Inquest handheld application refer to the "Handheld Setup" section in chapter 1 of this User's Guide.

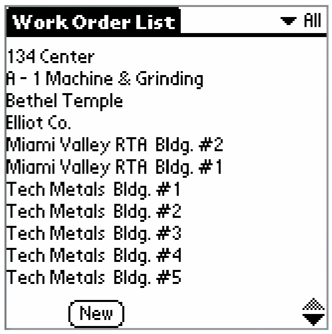
Starting Inquest

To begin using Inquest handheld application tap on the "Extngshr" icon with the stylus. Inquest handheld application will start. An informational message will display if the PSC Momentum Bar Code Scanner is not available.



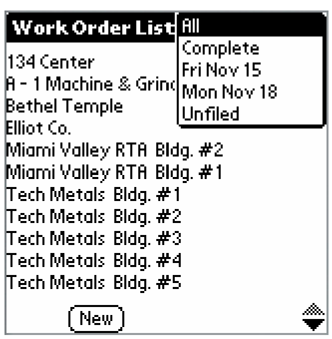
Work Order List

The starting display is the "Work Order List". The "Work Order List" contains all the site names that exist in the handheld computers database. This database is a subset of the desktop Extinguisher application's database. These work orders were assigned to a specific technician and downloaded to the technician's handheld. See Chapter 8 of this manual for assigning work orders.



Categories

In the upper right-hand corner of the display is the category display and selection control. By clicking the down arrow with the stylus a list of available categories is displayed. Selecting one of the categories will limit the displayed work order list to those work orders within that category.

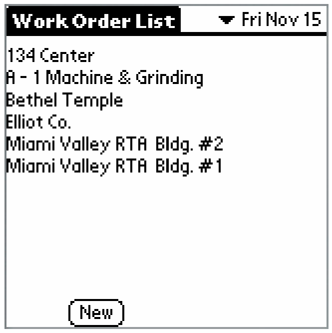


The available categories and their meanings are:

1. All: display all work orders currently in the handheld database.

2. Complete: display all work orders that have been placed into the complete category. Work orders within the complete category will be uploaded to Inquest desktop application during the next HotSync operation.

3. A specific assignment date: these categories correspond to the start date for the work orders available in the handheld database.



4. Unfiled: a catch-all category for work orders that were created on the handheld. If there are more than 14 days of assigned work orders in the handheld database, the work orders with the earliest start dates will also appear in the "Unfiled" category.

Searching the List

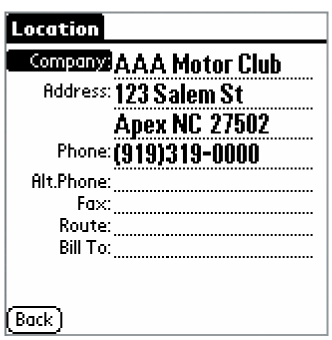
The work order list is searched by writing in the "Graffiti area" with the stylus. When the start of a job site name matches the characters written it will be highlighted in the list. A search icon will display in the lower right hand corner during a search operation. While the icon is displayed any additional characters entered will be appended to the search criteria. The search icon will disappear if another character is not detected within a few seconds and a new search can be started.

Updating Work Orders

By selecting a site name in the work order list with the stylus Inquest will open the detailed information for that work order.

Adding New Work Orders

New site locations can be added by pressing the "New" button in the lower left hand corner of the work order list. Pressing the button will take you to the location edit screen. Details on editing a location record are later in this chapter.



Work Order View

The work order view lists the options available for a work order. "Location", "Work Order", and "Contacts" are always listed. Other options listed are the services that the work order has been created for. These selections will take you to more detailed information.

New

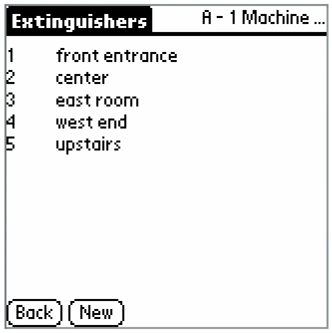
Pressing the new button in the work order view will add additional services to be completed under the work order. Only services that are not currently on the work order can be added.

Back

Pressing the "Back" button will close the current work order and return to the work order list.

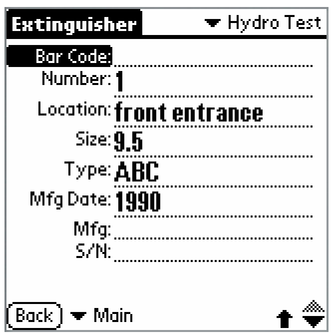
Equipment List

By tapping on one of the services listed in the "Work Order" view. An equipment list for at that site will be shown. The number and location for each piece of equipment will be listed.



Equipment Details

By selecting a particular item in the list with the stylus Inquest will open the detailed information for that piece of equipment. The example in figure x below shows that the "front entrance" extinguisher was selected. The information can be changed/updated by changing the information in the displayed edit form. Details on editing can be found later in this chapter.



Adding New Items

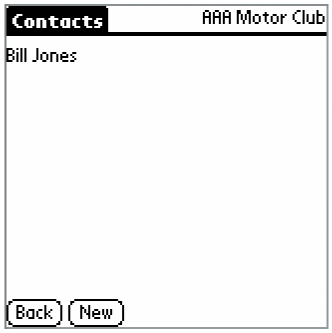
New pieces of equipment can be added by pressing the "New" button in the lower left hand corner of the equipment list. Pressing the button will take you to the edit screen.

Back Button

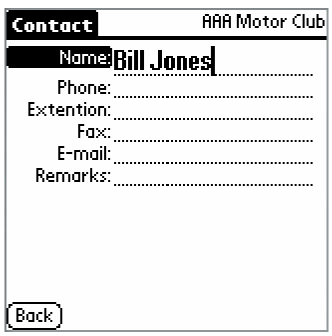
Pressing the "Back" button will close the equipment list and return to the work order view.

Contacts List

The "Contacts" list will show the name and phone number for all contacts at the job site.



Contact Details
By selecting a particular contact in the list with the stylus Inquest will open the detailed information for that contact. The information can be changed/updated by changing the information in the displayed edit form. Details on editing contact information can be found later in this chapter.



Adding New Contacts
New contacts can be added by pressing the "New" button in the lower left hand corner of the contacts list. Pressing the button will take you to the contact edit screen.

Back Button
Pressing the "Back" button will close the contacts list and return to the work order view.

Edit Forms

The edit forms are used to update information for the customer record. Forms exist for all information that can be changed. These include "Location", "Work Order", "Contact", and the various service and equipment types associated with the work order.

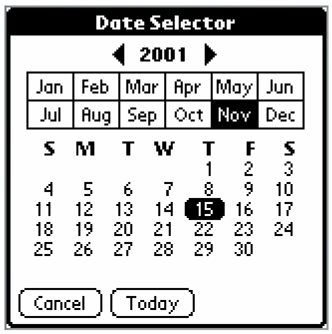
Changing Data
To change information in an edit form, select the field to be changed with the stylus. The data insertion point will be set to the location that was selected with the stylus. By

writing in the "Graffiti area" with the stylus the information is changed. The information can also be changed by scanning a bar code.

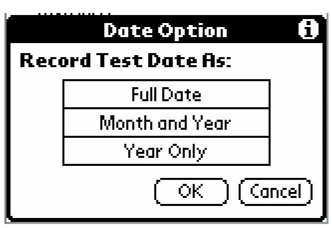
Some fields have certain values that can be entered. On these fields a list of available options will be displayed when the field is selected. Choose one of the options in the displayed list to update the data.

Date Fields

Date fields are updated with a calendar control. When selecting a date field with the stylus a calendar will be displayed. Selecting a date in the calendar will record the value selected.



Equipment test dates can be entered as full dates, month and year, or year only. When selecting a test date to be entered a prompt will display asking which date information to record. Select the appropriate test date type and press the "OK" button. The calendar control will display and record only the type of test date specified.



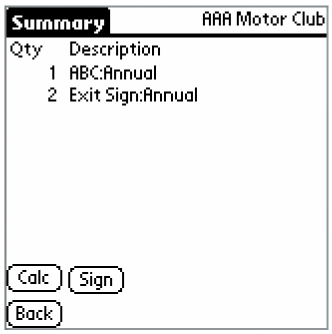
Setting a date type preference will turn off the test date prompt. Set a preference by selecting the menu option in the lower left "Graffiti area". Inquest menu bar will then be displayed. Select the "Options" menu and the "Preferences…" menu item with the stylus. A dialog box will be displayed showing the options available. The current option that is set will be highlighted. Change the preference by selecting the appropriate option and pressing the "OK" button.

Completing a Work Order

The work order edit form allows you to complete the work order and have it uploaded to the main database.

Completing the Work Order

In the upper right hand corner of the screen is the category display and change control. By clicking the down arrow with the stylus a list of available work order status values are displayed. Selecting one of the categories will change the work order status and the work order category. By selecting the "Complete" category, the "End Date" date will automatically be updated to the current date and the job will be uploaded to Inquest desktop application during the next HotSync operation.



When marking the work order status to "Complete", Inquest will check all equipment status fields. If any equipment status field has not been updated a message will display indicating an item has been missed. By pressing the "Continue…" button the work order status will remain unchanged and the missed equipment's location and information will be displayed. Pressing the "Complete" button will result in the job being set completed and ready for upload to the main PC database. This should only occur for a service call, such as a recharge, in which only a portion of the fire extinguishers are being serviced, or if multiple technicians are completing a job and a portion of the completed work is stored on a separate handheld.

Back

Return to the work order view form by pressing the "Back" button.

Equipment Edit

The equipment edit form allows you to view and update information for the equipment being serviced by the work order.

The top right corner of the form displays the type of service required based upon service information at the time of download. The value will indicate the type of test, inspection, or service that is required based upon the equipment type and the service frequency for that equipment. By changing this value to complete the appropriate service date will be updated with the current date.

Back

Return to the equipment list view by pressing the "Back" button.

Edit Form Pick List

Pressing the pick list drop down arrow will display other edit forms available for the equipment type. Included in this list are:

- Dates – Test, inspection, and service dates for the particular equipment type.
- UDF – User defined fields specified in Inquest desktop application for the service type.
- Note – Remarks section for the current service type.

Also available in the pick list is the equipment "Move" option. Moving equipment is explained in detail later in this chapter.

Contact Edit

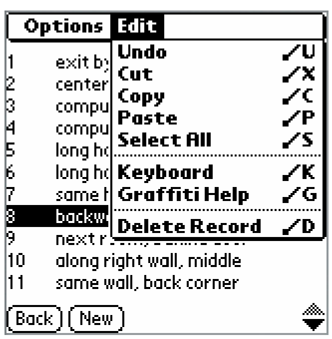
The contact edit form allows you to update the information for a job site contact.

Back

Return to the contacts list view by pressing the "Back" button.

Deleting Records

Remove a record by selecting the menu option in the lower left "Graffiti area" with the stylus. Select the "Edit" menu and chose the "Delete Record" option.



The delete operation can be performed at any time. The context of the delete depends on the currently displayed information. From a list display a delete operation will remove the currently highlighted record. From a detail/edit view the delete will remove the currently displayed record. A confirmation message will be displayed before the record is actually deleted.

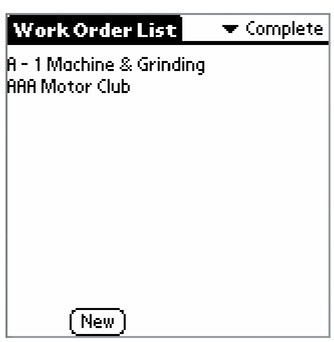
Deleting a piece of equipment, contact, or note on the handheld will delete the corresponding information from Inquest desktop database during the next HotSync operation. If a work order is deleted it will be removed from the handheld database and remain in Inquest desktop database. Removing a work order from the desktop database requires the use of Inquest desktop application.

Scanning Bar Codes

With the optional bar code scanner installed, the handheld computer will further enhance productivity and dramatically improve accountability at the job site. See your handheld scanner documentation on how to perform a scanning operation.

The context of the scan depends on the currently displayed information. The following explains the action taken when a bar code is scanned.

- "Work Order List": the scan will search the listed work orders for a matching bar code. If a matching bar code is found that equipment's detail information will be displayed.



- "Edit Form": the scan will enter the scanned information into the currently selected field. If the data entry point is on the "Location" field, the scanned bar code will be appended to the end of the location information. This feature, when used with the "Location Codes" report, allows for rapid entry of location descriptions.

- "Equipment List": the scan will search the equipment list for a matching bar code. If a matching bar code is found, that fire extinguisher's detail information will be displayed.

When the bar code of a piece of equipment is scanned; the date and time is recorded. By bar coding each piece of equipment, compliance with regulatory standards can be assured.

Moving Equipment

To keep the equipment list accurate the capability to move/swap like equipment types exists. A situation where this would occur is swapping a spare piece of equipment with one installed at a specific location in the equipment list.

1. Scan the spare equipment that will be placed into service. The spare equipment's service information will be displayed.

2. Select the "Move" option from the pick list that shows "Main" at the bottom of the edit form.

3. The equipment list will now be displayed to select another location.

4. Scan the equipment that needs to be replaced. A confirmation message will display to confirm the move operation. The buttons in the confirm dialog perform these actions.

   - "Yes": will swap the equipment data effectively putting the spare at the location desired and placing the other extinguisher into the spare pool.

   - "No": will return you to the equipment list to select a different location for the move process.

   - "Cancel": will cancel the move process and leave the equipment data as is.

Work Summary and Signature Capture

Inquest can calculate the work summary for a work order and capture a signature for the work order.

To calculate the work summary, go to the "Work Order View" screen. At the bottom of this screen is a button called "Summary". By tapping the "Summary" button Inquest will display a list screen where the work summary can be displayed.

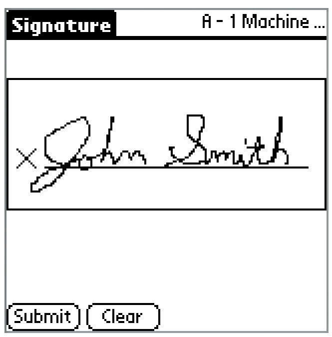
Calc Button

By tapping the "Calc" button an option screen will be displayed asking if you want the summary calculated for "All" equipment of only "Completed" equipment. The summary will then be compiled and displayed.

Sign Button

By tapping the "Sign" button a signature capture screen will be displayed. By signing in the signature area and tapping the "Submit" button a signature will be saved with the work order. This signature will print on the "Work Order" sheet in Inquest.

Tapping the "Clear" button will erase the signature.



Chapter

10

Inquest Handheld Application for Windows Mobile

Inquest has a software application that can be used on the job site by service personnel. Inquest handheld application for the Windows Mobile can be used on any handheld device that supports Windows Mobile and the Microsoft .NET Compact Framework. The bar coding feature requires a handheld unit with a compatible bar code reader.

Handheld Setup

For details on setting up Inquest handheld application refer to the "Handheld Setup" section in chapter 1 of this User's Guide.

Starting Inquest

To begin using Inquest handheld application, tap on the "Start" menu with the stylus and select "Programs". Tap "Inquest" icon to open the program.

Work Order List

The starting display is the "Work Order List". The "Work Order List" contains all the site names that exist in the handheld computers database. This database is a subset of the desktop Extinguisher application's database. These work orders were assigned to a specific technician and downloaded to the technician's handheld. See Chapter 8 of this manual for assigning work orders.

Updating Work Orders

By tapping a work order in the list with the stylus Inquest will open the detailed information for that work order.

Adding New Work Orders

New site locations can be added by tapping and holding the stylus down in the work order list to display a menu. Selecting the "Add" option will take you to an empty work order edit screen. Details on editing a work order are later in this chapter.

Work Order View

The work order view shows all the tabbed forms available for adding or changing information. By tapping on a tab with the stylus additional information can be added or modified.

Back

Tapping the "Back" menu option will close the current work order and return to the work order list.

Customer / Facility

The "Customer/Facility" tab contains information pertaining to the service location and the overall work order status. Once the job is complete the synchronization process is signaled by change the "Status" from "Open" to "Complete".

Billing

The "Billing" tab is only available with the accounting option. It contains information pertaining to the customers billing information.

Invoice / Summary

The "Invoice/Summary" tab is used to summarize the work to be completed or the work that has been completed and to calculate invoices. Calculating invoices requires the accounting option.

To calculate and invoice or summarize the work completed tap the "Options" menu and select the "Calculate" option.

To print a service ticket or invoice, tap the "Options" menu and select "Print". Printing capability required the portable printing option and a printer connected to the handheld computer.

Contacts

The "Contacts" tab will list any contacts for this service location.

Services

The "Services" is used to list the services to be performed at this location. A service can be added by tapping and holding the stylus to display a context menu. By tapping on a service named in the list the program will display detailed information regarding the service selected.

Equipment List

By tapping on one of the services listed on the "Service" tab. An equipment list for that site will be shown. The number and location for each piece of equipment will be listed.

Equipment Details

By selecting a particular item in the list with the stylus Inquest will open the detailed information for that piece of equipment. The information can be changed/updated by changing the information in the displayed edit form. Details on editing can be found later in this chapter.

Adding New Items

New pieces of equipment can be added by tapping and holding the stylus on the equipment list. A popup menu will display. Selecting the "Add" option will take you to an empty edit screen to add the required information.

Back

Tapping the "Back" menu option will close the equipment list and return to the work order view "Service" tab.

Contacts List

The "Contacts" tab will list the name and phone number for all contacts at the job site.

Contact Details

By selecting a particular contact in the list with the stylus Inquest will open the detailed information for that contact. The information can be changed/updated by changing the information in the displayed edit form. Details on editing contact information can be found later in this chapter.

Adding New Contacts

New contacts can be added by tapping and holding the stylus on the contact list. A popup menu will display. Selecting the "Add" option will take you to an empty edit screen to add the required information.

Edit Forms

The edit forms are used to update information for the work order. Forms exist for all information that can be changed.

Changing Data

To change information in an edit form, select the field to be changed with the stylus. The data insertion point will be set to the location that was selected with the stylus.

The Windows Mobile has several options on entering data into edit fields. The options include "Block Recognizer", "Keyboard", "Letter Recognizer", and "Transcriber". See your Windows Mobile documentation or help for information on how to use these data entry options.

Inquest is a bar code enabled application. Information can also be entered into edit fields by scanning a bar code.

Some fields use drop down lists which allows only certain values that can be entered. On these fields a list of available options will be displayed when the field is selected. Choose one of the options in the displayed list to update the data.

Date Fields

Equipment test dates can be entered as full dates, month and year, or year only.

Completing a Work Order

The work order edit form allows you to complete the work order and have it uploaded to the main database.

Completing the Work Order

On the "Customer/Facility" tab the first field is a drop down list called "Status". By clicking the down arrow with the stylus a list of available work order status values are displayed. Selecting one of the values will change the work order status.

By selecting the "Complete" status, the job will be uploaded to Inquest desktop application during the next ActiveSync operation.

When marking the work order status to "Complete", Inquest will check all equipment status fields. If any equipment status field has not been updated a message will display indicating an item has been missed. By pressing the "Continue…" button the work order status will remain unchanged and the missed equipment's location and information will be displayed. Pressing the "Complete" button will result in the job being set completed and ready for upload to the main PC database. This should only occur for a service call, such as a recharge, in which only a portion of the fire extinguishers are being serviced, or if multiple technicians are completing a job and a portion of the completed work is stored on a separate handheld.

Equipment Edit

The equipment edit form allows you to view and update information for the equipment being serviced by the work order.

The "Dates" tab will indicate the type of service required based upon the service dates at the time the work order was created. A checkmark will appear in the box next to the test, inspection, or service that is required based upon the equipment type and the service frequency for that equipment. By changing the equipment status to "Complete" the appropriate service date will be updated with the current date.

Back

The "Back" menu option will return to the equipment list.

Contact Edit

The contact edit form allows you to update the information for a job site contact.

Back

The "Back" menu option will return to the contact list.

Deleting Records

Remove a record by tapping and holding an item in a list until a popup menu displays. Selecting the "Delete" menu option will delete the currently selected record. A confirmation message will be displayed before the record is actually deleted.

Deleting a piece of equipment, contact, or note on the handheld will delete the corresponding information from Inquest desktop database during the next synchronization operation. If a work order is deleted it will be removed from the handheld database and remain in Inquest desktop database. Removing a work order from the desktop database requires the use of Inquest desktop application.

Scanning Bar Codes

With the optional bar code scanner installed, the handheld computer will further enhance productivity and dramatically improve accountability at the job site. See your handheld scanner documentation on how to perform a scanning operation.

The context of the scan depends on the currently displayed information. The following explains the action taken when a bar code is scanned.

- "Work Order List": the scan will search the listed work orders for a matching bar code. If a matching bar code is found that equipment's detail information will be displayed.

- "Edit Form": the scan will enter the scanned information into the currently selected field. If the data entry point is on the "Location" field, the scanned bar code will be appended to the end of the location information. This feature, when used with the "Location Codes" report, allows for rapid entry of location descriptions.

- "Equipment List": the scan will search the equipment list for a matching bar code. If a matching bar code is found, that fire extinguisher's detail information will be displayed.

When the bar code of a piece of equipment is scanned; the date and time is recorded. By bar coding each piece of equipment, compliance with regulatory standards can be assured.

Work Summary and Signature Capture

Inquest can calculate the work summary for a work order and capture a signature for the work order.

To calculate the work summary, go to the "Invoice/Summary" tab. Tapping the "Options" menu will present you with several options.

Calculate

By tapping the "Calculate" menu option, a screen will be displayed asking if you want the summary calculated for "All" equipment of only "Completed" equipment. The summary will then be compiled and displayed.

With the accounting option this action will calculate the invoice and display the total cost.

Print

By tapping the "Print" menu option a service ticket or invoice can be printed. The portable printing option is required for this feature to be enabled.

Signature

By tapping the "Signature" menu option a signature capture screen will be displayed. By signing in the signature area and tapping the "OK" button a signature will be saved with the work order. This signature will print on the "Work Order" sheet in Inquest.

Tapping the "Clear" button will erase the signature.

Chapter

11

Customizing Inquest

Inquest has many features to allow for customized equipment inventory and service tracking.

Customize Menu

All customization features can be found on the "Customize" menu within Inquest software application. Each menu option will be described in this chapter.

Services

The services menu option on the "Customize" menu is where additional service types, equipment types, service intervals for equipment, and user defined fields are entered.

Service Types

The first window displayed lists all available service types in Inquest program. The predefined services are "Fire Extinguishers", "Fire Suppression Systems", "Emergency and Exit Lights", "Automatic Sprinkler System", and "Fire Alarm". These services can be modified but they cannot be deleted.

To add additional service types click the "Add" button at the bottom of the window. You will be prompted for a description of the service and a short 4-character code that will be used on the "Service Due" report.

Equipment Types

Various equipment types can be added to each service that is available. To add equipment types to a service follow these instructions:

1. Open the appropriate service by highlighting its name in the list and clicking the "Edit" button at the bottom of the window.

2. Click on the “Equipment Types” tab.

3. Equipment types can be added by clicking the “Add” button at the bottom of the window.

To modify the equipment information, highlight a listed type and click the “Edit” button.

User Defined Fields

The user defined fields tab lists additional information you want to track for each piece of equipment listed. An unlimited number of fields can be created and the type of information can be specified. The available data types are “Text”, “Numeric”, and “Date”. Inquest program will verify the data entered for a user defined field will match the data type as it has been defined.

Equipment Tests/Inspections/Services

When adding or modifying equipment types a “Test/Inspections/Services” tab is available. This tab will maintain the types of service work performed for piece of equipment and how often the service is to be performed. For example, an ABC fire extinguisher requires a hydrostatic test every 12 years. You can see this information listed in the “Test/Inspections/Services” tab for ABC fire extinguishers.

Inspection Forms

The “Inspection Forms…” menu option on the “Customize” menu is where the inspection forms for a particular service type are added and modified. Inquest has a default set of forms which can be modified to better suit your needs.

The forms can be modified by selecting an item and making appropriate selections from the “Insert” menu. The mouse can also be used to right click on an item to bring up a popup menu with available actions to perform.

Section

A section is used to group related form information. An example of inspection form sections would be “Owners Section” and “Inspectors Section”. These areas would group together specific questions to be answered by the appropriate person.

Header

A header is used to further divide a group of related questions within a particular section. By giving descriptive headers an understandable form can be produced.

Question

Questions create the actual checklist within the inspection form. A question can be “Pass/Fail” or “Record Value” By double clicking on a question a properties dialog is displayed. The question type can be entered. For “Record Value” questions a unit of measure must be entered. The unit of measure list is a build as you go list. Any previously used values will be maintained in the list and any new values can be added by simply typing in the value needed.

Note

A note is used to supply additional text information within an inspection form.

Signature

A signature item is used to add an area to the inspection form where a signature can be written. The text information associated with the signature is used to describe who is to sign the inspection form. An example would be "Owner or Representative" or "Inspector".

The inspection form and its text values are completely modifiable to suit your needs.

Defined Values

The "Defined Values…" menu option on the "Customize" menu is where the "build as you go" value lists can be modified.

The window is divided into two panels. The left side lists the specific lists within Inquest application. For example "Manufacturers" contains the list of all manufactures that have been used within Inquest program. The right hand side lists the values contained within the list.

Using the mouse and right clicking within the list of values in the right hand panel a menu will appear listing the actions available. You can change the value, remove a value, or insert a new value.

Price Lists

The "Price Lists…" menu option on the "Customize" menu is enabled when the optional accounting interface with QuickBooks has been enabled. By selecting this menu item a window where billable services can be associated with a billable item in QuickBooks is displayed.

Multiple Price Lists

Each tab in the price list window is a different price list. The first tab is labeled "Standard" and represents the base price charged to a typical customer. Additional price lists can be created by selecting the "Price List…" option on the "Insert" menu. Customers are assigned to a price list on the "Billing" tab of their file. See Chapter 3 "Entering Customer Information" for further details.

Billable Services

The tabbed price list area is divided into two sections. The right hand side lists the billable item that will be used on an invoice. The left hand side shows the service, equipment type, and billable service the item represents.

To enter an item and price for the information displayed select "Item…" option on the "Insert" menu. The displayed window will allow you to select an item from your QuickBooks Item List to be used to create an invoice. The description and price of the item can be changed as needed.

Fire Extinguishers and Fire Suppression Systems

Most services will only allow one billable item. The "Fire Extinguishers" and "Fire Suppression Systems" services will allow multiple billable items for each service.

Fire extinguishers can have different prices for different sizes. A catch all size called "<Default>" is used if all sizes have the same price or a specific size does not have a price associated with it. Fire suppression system service prices are handled in the same way except the system model is used to distinguish different prices.

Updating Prices

The "Price List Copy" button will allow you to copy on price list to another with an optional markup or markdown. The displayed window will allow you to select a source price list and a target price list. A markup percentage or value can also be entered. By putting a minus sign (-) in front of the value the prices will be marked down.

The "Update Prices" button will update all the prices in the current price list with the price for the corresponding item in QuickBooks.

"Copy", "Paste", and "Delete" are available for updating and entering items.

Options

The "Options…" menu option on the "Customize" menu is where Inquest can be further customized based upon your needs. The options window contains various tabs. Many of these tabs and their use have been described in this User's Guide where appropriate.

Options

This tab contains general options that can be used to customize Inquest.

- Facility Management – by checking this box a facility manager can have Inquest application configured to better suit the needs of a facility. For example, Inquest can refer to facility names and locations instead of customer names and addresses.

- Include day in "Next Service" date calculation – by default the automatic calculation of next service date will only include month and year. By turning this option on, the day of the week will also be included if it is available in the last service date. Note: service frequencies that use days and weeks will always include the day of the week regardless of this setting.

- Out of Test Policy – The out of test policy is used by Inquest to assist in determining what service action is due for a piece of equipment. For example, a fire extinguisher that is currently within spec for hydro test but will fall out of spec before the next annual service date. By selecting the first option, "Schedule if occurs before next service visit", Inquest will be flagged for hydro test. By selecting the second option, "Schedule if occurs before ½ of service frequency lapse", Inquest will be flagged for hydro test if it falls out of spec within 6 months; otherwise it will be flagged for annual service.

- The "Ignore month in 6 Year and Hydro Test dates" option will force Inquest to use only the year of the last test when determining if the fire extinguisher is due for 6 Year Maintenance or Hydrostatic Test.

Tracing

This tab is used to capture helpful information for Technosoft if a problem occurs while using Inquest. You may be asked by technical support to turn the tracing feature on and email the trace file to Technosoft should a problem occur.

Chapter

12

Networking Inquest

Inquest can share a database on your computer network with multiple computers running Inquest software.

Database Networking

When starting Inquest, you are prompted to open a company database. By pressing the "New data source" button, you can create a new or open an existing database on your network.

Selecting an Existing Database

Follow these steps to select an existing database.

1. Click the "New data source" button.
2. Select the "Open an existing database" radio button. Click "Next".
3. Select the type database to connect to. Click "Next".
4. Browse to the database location and select the database name.
5. Click the "Open" button.
6. Click the "Finish" button.

Creating a New Database

Follow these steps to select a new database.

1. Click the "New data source" button.
2. Select the "Create a new database" radio button. Click "Next".
3. Select the database type to create. Click "Next".

4. Browse to the location to create the new database. Click "OK".

5. Click the "Finish" button.

Update Conflicts

With the networking option enabled it is possible for two people to attempt updates to the same information. If a record is updated at the same time an update conflict can occur.

When an update conflict occurs a message will appear to the user whose changes are in conflict with another's. To view the conflict, access the "Conflicts Display" tool on Inquest desktop application.

The conflicts display tool will group all conflicts that occurred by "Date" and "Customer Name" in the left panel of the tool. Underneath the customer name is a number for each conflict that occurred for that particular customer. By clicking on a conflict number, the details of the conflict that occurred will be shown in the right panel of the tool.

The conflict details show three different value types for the database record:

- Original: The database values as they existed when the customer was originally opened.

- Current: The database values as they existed when the save request was attempted.

- Update: The database values that were trying to be saved when the conflict occurred.

By examination of the conflict details, the appropriate values can be corrected by reopening the records in question and entering the appropriate values. After the conflict has been resolved it can be removed from the "Conflicts Display". Click the conflict record with the right mouse button and select the "Delete" menu option.

Chapter

13

Remote Server

Inquest mobile computing solution for the Microsoft Windows Mobile platform can synchronize over wireless networks.

Installing the Remote Server

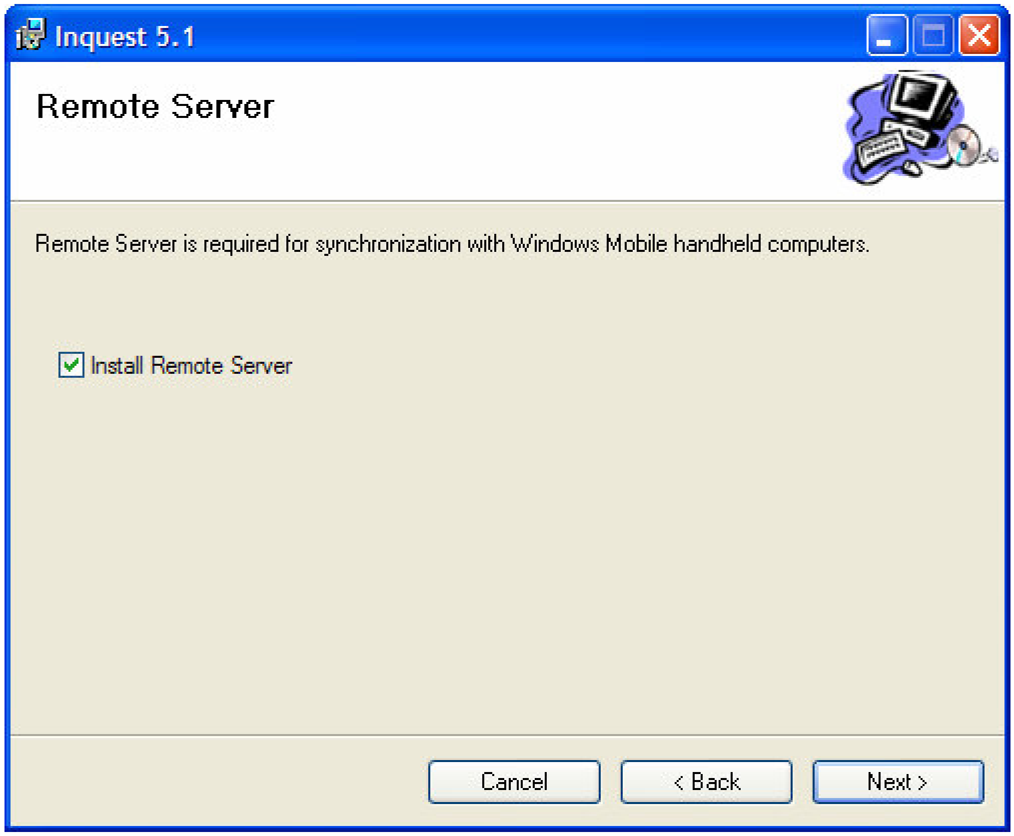
The Remote Server is installed as part of the Inquest software application.

Starting the Install Program

To begin the setup program follow these instructions:

1. First, close any open programs.
2. Insert Inquest CD-ROM into the computers CD-ROM drive. Depending on your computer, if you're installing from a CD-ROM for the first time, Setup might start automatically. If it does, you can skip the following steps and follow instructions in the "Install Program Options" section. If Setup doesn't start automatically, follow the instructions below.
3. Click the Start button on the taskbar.
4. Click the "Run" option.
5. In the "Open" field type in the following command
    a. <drive letter>:\ExtInst.exe
    b. Where <drive letter> is your CD-ROM drive.
6. Click the OK button.

Install Program Options
The install program will display the following screen.



1. Click the "Install Remote Server" checkbox.
2. Click the "Next >" button.
3. Continue to follow the instructions on your screen.

Starting the Remote Server

The install program will place the Remote Server in your computers Start menu Startup folder. Anytime you restart your computer the Remote Server program will start automatically.

To start the Remote Server manually follows these steps:

1. Open the "Start" menu.
2. Select "All Programs".

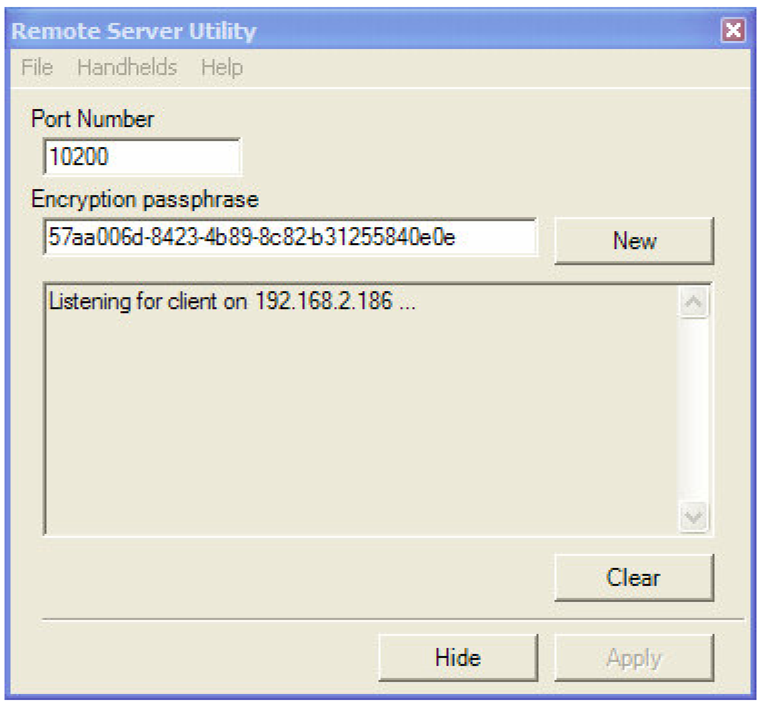
3. In the "Startup" folder click on "Remote Server"

Configuring the Remote Server

The Remote Server runs in the background. When the Remote Server is running an icon appears in your system tray.

The earth picture, , is the Remote Server program.

By right clicking your mouse on the Remote Server picture a menu will appear that will allow you to open the configuration window.



Port Number

The Remote Server uses the network protocol TCP/IP. This is the same protocol used on the Internet. A port number is a channel that the remote server will "listen" on for a client wanting to synchronize.

Encryption Passphrase

The information communicated between the Remote Server and the client handheld devices is encrypted. The encryption passphrase is required to encrypt and decrypt these communications. Clicking the "New" button will generate a new unique passphrase.

Status Field

The status field will display the status of the server and any synchronization that have occurred. In the example window we can see that our server IP address is 192.168.2.186. The "Clear" button will erase all the information currently displayed in the status field.

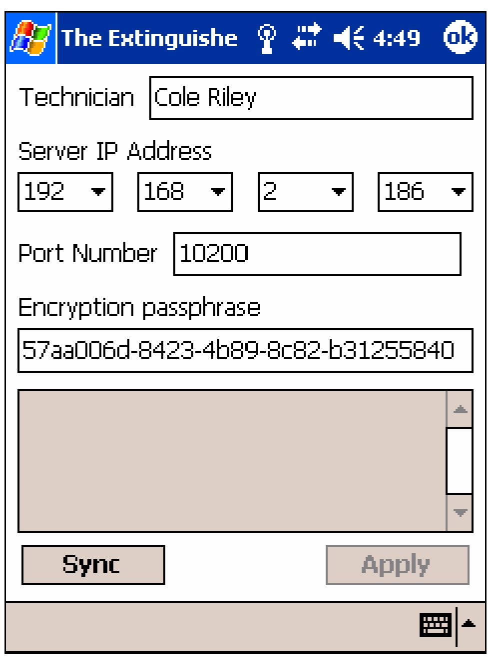
Configuring the Windows Mobile Device

For instructions on setting up ActiveSync and installing Inquest on a Windows Mobile device see Chapter 1 of this User's Guide. The following steps must be completed before doing a remote synchronization.

1. Install Inquest on the Windows Mobile Device
2. Start Inquest on the handheld device.

Now configure the wireless communication information.

3. From the work order list screen in Inquest click on the "Options" menu.
4. Select the "Wireless Communication…" menu option to display the following window.



The server information required can be entered directly into the handheld and can be found on the Remote Server configuration screen. Changes must be save by clicking the "Apply" button. To initiate communication with the server click the "Sync" button.

Access Permission

The first remote synchronization will request access from the server administrator. To grant access from a handheld:

1. Open the Remote Server.
2. From the "Handhelds" menu select the "Technicians…" option.
3. The displayed dialog will display a list of technicians that either currently have remote synchronization privileges or have requested them.
4. Grant permission by selecting the technician name and clicking the "Allow Access" button

Remote Synchronization

Once permission has been granted by the server administrator wireless synchronizations can be performed by following these steps.

1. Start Inquest program on your handheld.
2. From the Work Order list screen click on the "Options" menu.
3. Select the "Wireless Communication…" menu option.
4. Click the "Sync" button.