



# InspectTech Manager 7.4

 Bentley®



# Table of Contents

<b>PREFACE</b> .....	<b>5</b>
InspectTech Software.....	5
Collector Module .....	5
Maintenance Module .....	5
Manager Module.....	5
Administration Module.....	5
Mobile Application.....	5
InspectTech Software's Users.....	6
InspectTech Software's Purpose.....	6
Requirements for InspectTech 7.4.....	7
Core Tasks.....	8
Collector.....	8
Maintenance.....	10
Manager.....	11
Administration .....	13
<b>MANAGER MODULE</b> .....	<b>16</b>
Overview .....	16
Main Map.....	18
How to Use the Map .....	18
Query Tools.....	21
How to Construct a Basic Report Query .....	21
Adding Additional Filters to the Report Query .....	24
Select Display Columns for the Report Query.....	25
How to Save a Query.....	26
How to Load a Saved Query.....	27
How to Edit Query Results .....	28
How to Bulk Edit Query Results .....	29
How to Show Results on a Map .....	30
How to Export Results to Excel .....	31
How to Export Results to KML .....	32
How to Export Results to CSV .....	33
How to Build a Picture Query.....	34

Management Reports .....	36
How to Run a Management Report.....	36
Projects.....	38
How to Manage Projects.....	38
How to Create a Project .....	40
How to Manage Project Security .....	42
How to Add Work Specifications to a Project .....	44
How to Manage Work Specification Security.....	46
How to Add Supplemental Work Specifications .....	50
How to Delete Projects and Specifications .....	52
Projects .....	52
Work Specifications .....	53
Supplemental Work Specifications .....	53
 <b>CONTACT INFORMATION .....</b>	 <b>54</b>

# Preface

## InspectTech Software

Bentley's InspectTech software is a solution focused on the inspection and management of bridges and other assets. Bentley is a software provider, delivering comprehensive solutions for the infrastructure lifecycle. The InspectTech software system can be effectively used in the field to collect data and sync to the web server for approving reports, inspection management, performance management, maintenance need management, and MAP-21 compliance.

**InspectTech Software consists of four different modules:**

### Collector Module

Inspectors and read-only users access this module. From here, users can create, edit, and submit inspection reports, create maintenance items, and peruse the inspection schedule.

### Maintenance Module

Users create and manage work orders and maintenance items via the maintenance module. The maintenance module is typically accessed by managers and maintenance users.

### Manager Module

The manager module contains tools specifically for asset managers and owners. Users can create, edit, delete, and archive assets, construct report queries, and run system reports.

### Administration Module

The administration module contains tools for managing users, assets, and site parameters. Authorized users control permissions, alerts, manual uploads, logos, user accounts, assets, permission levels to other modules, report frequency, filters, and profile properties. Also available to administrative users are the new Deterioration Model and its settings.

### Mobile Application

Like the laptop application, the mobile application enables users to completely create, edit, and upload reports for their working set of assets, all while in the field and without any network connection. Versions 1 and 2 of the mobile application are only compatible with iOS mobile devices, and can be installed directly from the App Store. The mobile application emphasizes ease of use, accessibility, and clear graphics for the absolute best on-site reporting experience available.

## InspectTech Software's Users

We created InspectTech software primarily for agencies and State DOTs involved with asset inspection and management. The software is easy to use, intuitive, and configurable, morphing to each user's specific requirements and blanketing all levels of authority.

## InspectTech Software's Purpose

The purpose for InspectTech Software, since its founding, is to make the mammoth task of managing, inspecting, and maintaining bridges, roadways, and railways easier, more efficient, and more productive.

## Requirements for InspectTech 7.4

Browser	<p>Minimum Requirements: Internet Explorer 9 and later Firefox 25 and later Chrome 32 and later</p> <p>For best performance it is recommended to use the following versions: Internet Explorer 11 Firefox – Latest available (34 at time of 7.4 release) Chrome – Latest available (40 at time of 7.4 release)</p>
Processor	<p>32-bit systems: 1 GHz or faster processor (2 GHz or faster recommended). Multi-core processor recommended.</p> <p>64-bit systems: 1.4 GHz or faster processor. Multi-core processor recommended.</p>
Memory	<p>Prior to install, there should be a minimum of 4GB free. More memory almost always improves performance, particularly when working with large amounts of data.</p>

# Core Tasks

## Collector

### ADD AND REMOVE BRIDGE ELEMENTS

By selecting this option, administrators give users the authority to add and remove bridge elements from the National Bridge Elements form.

### ADD AND REMOVE PROTECTIVE SYSTEMS AND DEFECTS FROM PHYSICAL ELEMENTS

By selecting this option, administrators give users the authority to add and remove protective systems and defects attached to bridge elements from the National Bridge Elements form.

### ADD FILES FROM HISTORIC AND CURRENT REPORTS TO WORK MANAGEMENT GROUPS AND INSTANCES

When this option is selected, users can select attachments from previous reports when linking files to asset tasks like maintenance items.

### APPROVE REPORTS

If this option is selected, users within the role can approve an inspection report and make it uneditable.

### CREATE PROJECTS

This permission works hand-in-hand with Access Project Tasks. If selected, users will be able to manage existing project tasks, only if the Access Project Tasks option is selected.

### CREATE MAINTENANCE ITEMS

Administrators can grant users permission to create maintenance items by selecting this option.

### DELETE LAPTOP REPORTS FROM THE SERVER

With this option, users are able to delete reports created or currently saved on a laptop from the main server. Deselecting this option keeps the laptop reports safe from unwarranted deletes.

### EDIT ASSET CONDITION VALUES

If using the deterioration functionality, users of this role will have the ability to update the current condition value within the deterioration module.

### EDIT ASSET DETAIL HISTORY ON THE ASSET DETAIL SCREEN

When this option is selected, users can edit the asset detail history via the asset's detail page.

### EDIT ASSET VALUES

Selecting this option allows a user to edit an asset's asset values.

### EDIT MAINTENANCE ITEMS

If this option is selected, users within the role will be able to edit existing maintenance items.

### MANAGE ASSET SCHEDULES

This permission allows module users to manage an asset's schedule on its asset detail page. They can schedule inspections, set recurring dates for inspections, and assign users to the inspection.



#### MANAGE COMPONENTS

With this permission, users can manage the components, or sub-assets, that exist within an asset. If an inspector cannot manage a full asset, this permission allows him to instead edit individual sub-assets.

#### MANAGE THEIR OWN WORKING SET

When this option is selected, users can decide which assets will be included in their working set.

#### MERGE IN PROGRESS REPORTS FOR THE SAME ASSET

This allows users to access the merge reports page to merge in progress reports for the same asset into a single report.

#### MODIFY BRIDGE ELEMENT TOTAL QUANTITIES

Users granted this permission can revise the number originally set for a bridge element's total quantity on the National Bridge Elements form.

#### SHARE SAVED ASSET TASK FILTERS WITH OTHER USERS

Users with this permission can edit public filters and assign them to other users.

#### UNAPPROVE REPORTS

When a report is approved, users can no longer edit the report content. However, if necessary, and if users are authorized to perform this action, approved reports can be "unapproved" and brought back for revision.

#### UPLOAD FILES ON THE ASSET DETAIL SCREEN

Checking this option allows role users to upload images, sketches, PDFs, and other relevant files to any assets via the assets' detail pages, including those within their working set.

#### UPLOAD SIGNATURE IMAGES

Users are able to upload an image of their signature to their user account page. This signature can then be used in various forms throughout the system (i.e.: in inspection reports).

#### UPLOAD THEIR OWN CERTIFICATES

All users can access their own user account. If a user possesses a certificate relevant to their work within the agency and desires to make the certificate available to other users within the system, they can upload their certificate to their user profile or account. users can only perform this task if this option is selected.

#### VIEW ARCHIVED ASSETS

This allows users to access the archived asset page where they have access to assets which have been archived in the system.

#### VIEW I-MODELS

For users that have i-models integrated into the system, this permission allows the users to view and interact with the i-model.

## Maintenance

### ADD FILES FROM HISTORIC AND CURRENT REPORTS TO WORK MANAGEMENT GROUPS AND INSTANCES

When this option is selected, users can select attachments from previous reports when linking files to asset tasks like maintenance items.

### CREATE MAINTENANCE ITEMS

Administrators can grant Maintenance users permission to create maintenance items by selecting this option.

### EDIT ASSET CONDITION VALUES

If using the deterioration functionality, users of this role will have the ability to update the current condition value within the deterioration module.

### EDIT ASSET VALUES

Selecting this option allows a user to edit an asset's asset values.

### EDIT MAINTENANCE ITEMS

If this option is selected, users within the Maintenance role will be able to edit existing maintenance items. If the Create Maintenance Items option is selected, they'll also be able to create new maintenance items.

### MANAGE OWN WORKING SET

When this option is selected, users can decide which assets will be included in their working set.

### MANAGE WORK ORDERS

This allows users to access the manage work order screen where work orders can be created and edited and maintenance items can be attached to the work orders.

### SHARE SAVED ASSET TASK FILTERS WITH OTHER USERS

Users with this permission can edit public filters and assign them to other users.

### UPLOAD SIGNATURE IMAGES

Users are able to upload an image of their signature to their user account page. This signature can then be used in various forms throughout the system (i.e.: in inspection reports).

### UPLOAD THEIR OWN CERTIFICATES

All users can access their own user account. If a user possesses a certificate relevant to their work within the agency and desires to make the certificate available to other users within the system, they can upload their certificate to their user profile or account. Maintenance users can only perform this task if this option is selected.

## Manager

### ADD FILES FROM HISTORIC AND CURRENT REPORTS TO WORK MANAGEMENT GROUPS AND INSTANCES

When this option is selected, users can select attachments from previous reports when linking files to asset tasks like maintenance items.

### CREATE PROJECTS

This permission works hand-in-hand with Access Project Tasks. If selected, users will be able to manage existing project tasks, only if the Access Project Tasks option is selected.

### EDIT ASSET DETAIL HISTORY

When this option is selected, users can edit the asset detail history via the asset's detail page.

### EDIT ASSET VALUES

Selecting this option allows a user to edit an asset's asset values.

### EDIT QUERY RESULTS DIRECTLY IN THE RETURNED RESULTS

When a manager runs a query within the system, the system offers the opportunity to edit the query results directly from the Report Query results screen. When this option is deselected, managers are unable to make a direct edit to the results.

### EDIT WORK ORDER RECORDS ON THE ASSET DETAIL PAGE

Users with this permission can edit work orders from the asset detail page.

### MANAGE OWN WORKING SET

When this option is selected, users can decide which assets will be included in their working set.

### MOVE AND SAVE GIS PAGE MARKERS

Enabling this will allow users to move the map marker to an asset's location.

### RUN ELEMENTS QUERY

This allows users to access the Element Query page to be able to create queries to return bridge element data.

### RUN PICTURES QUERY

This allows users to access the Picture Query page to be able to create queries to return pictures uploaded to assets and reports.

### RUN REPORTS QUERY

This allows users to access the Report Query page to be able to create queries to return asset and report values.

### SHARE SAVED ASSET TASK FILTERS WITH OTHER USERS

Users with this permission can edit public filters and assign them to other users.

### UPDATE FIELD VALUES BASED ON QUERY RESULTS

Users with this option will have permission to bulk update a single field's value to a new value based on the result of queries executed on the Report Query page.

#### UPLOAD FILES ON THE ASSET DETAIL SCREEN

Checking this option allows role users to upload images, sketches, PDFs, and other relevant files to a user's assets. The files will then be accessible via the assets' detail page.

#### UPLOAD SIGNATURE IMAGES

Users are able to upload an image of their signature to their user account page. This signature can then be used in various forms throughout the system: in inspection reports

#### UPLOAD THEIR OWN CERTIFICATES

All users can access their own user account. If a user possesses a certificate relevant to their work within the agency and desires to make the certificate available to other users within the system, they can upload their certificate to their user profile or account. Managers can only perform this task if this option is selected.

#### VIEW I-MODELS

For users that have i-models integrated into the system, this permission allows the users to view and interact with the i-model.

#### VIEW MAIN MAP

This allows users to access the Main Map to be able to view the location of all assets in the system on the included GIS Map.

#### VIEW MANAGEMENT REPORTS

This allows users to access the Management Reports screen and be able to generate management reports from the system.

## Administration

### ACCESS AUDIT REPORTS PERTAINING TO ASSET DETAILS

Selecting this task will allow administrative users to access the audit reports on the asset detail page containing asset values and other information.

### ACCESS THE ASSET DETAIL FIELDS AND ADMINISTRATION SCREEN

This option gives administrators the authority to access the Manage Asset Details page so they can create, edit, or remove fields displayed on the asset detail page.

### ASSIGN TASK SECURITY

Now contained within the Manage Roles screen, task security assignment determines which roles can perform which tasks within the system. When this option is selected, administrators have the authority to decide task permissions and securities.

### BULK IMPORT

This allows users to access the bulk import tools to be able to perform bulk imports of asset and report values, field definitions, assets, and user accounts.

### CREATE AND ASSIGN USER MESSAGES

Administrators have the ability to send users messages. These messages can be formatted to a default template. When this option is deselected, administrative users will not be able to create or assign user messages.

### CREATE AND EDIT ASSETS

When this option is selected, administrators can create and edit assets

### CREATE AND EDIT ROLES

Users granted this permission can not only create new roles (to be added to the Manage Roles page), but can also edit existing roles.

### CREATE AND EDIT USERS

Administrative users can easily create user accounts and assign them to roles, profiles, and user groups.

### CREATE PROFILES ON THE PROFILE CREATION PAGE

Profiles play a significant role in the hierarchy of roles and the security of individual agency information within the system. When this option is selected, administrators have the authority to create new profiles via the Manage Profiles page.

### CREATE SCHEDULES

With this permission, system administrators can create new schedule definitions for inspection types via the Manage Schedule Definitions page.

### DELETE ASSETS

Selecting this option will allow administrative users to delete assets from the inventory. This completely removes the asset, all of the asset's data, and all its files from the system.

#### EDIT ASSET VALUES

Selecting this option allows a user to edit an asset's asset values.

#### EDIT MANUAL PAGES

When this option is selected, administrators can upload manual pages to the system, link manual pages to fields within inspection reports, and update linked manual pages when necessary.

#### GENERATE THE FEDERAL NBI TAPE

Users with this permission can generate the US DOT Federal NBI data on the NBI Tape Generation page.

#### IMPERSONATE OTHER USERS

Selecting this option allows administrators to impersonate other users within the system via the Manage Users page. This permission helps administrators view and address an issue from the user's perspective.

#### IMPORT I-MODELS

When this option is selected, administrative users can import i-Model design files..

#### MANAGE ALL USER CERTIFICATES

Administrators can add or edit users' certificates on the Manage Certificates page. This option is helpful in case Collector, Maintenance, and Manager roles are not authorized to upload or edit their own certificates.

#### MANAGE ASSET AND REPORT SETTINGS

This grants users access to the Asset and Report Settings configuration tools suite. This allows users to configure settings for Asset Statuses, Asset Types, File Types and Categories, Forms, Inspection Types, Maintenance Types, Repeating Field Groups, Report Fields, Report Sections, Report Types, and Templates. This task should only be granted to very high level administrators who are very familiar with the site's configuration and have the authority to make changes.

#### MANAGE ASSET SECURITY

This option allows administrators to manage their system's inventory security on the User Group Security and Supplemental Security pages. This includes user group security, individual user security,

#### MANAGE E-MAIL ALERTS

Users with this permission can set and manage email alerts and determine who will receive them.

#### MANAGE ELEMENTS

This grants users access to the Manage Elements screen where they have the ability to create new Agency Developed Elements and edit the edit the element definitions in the system.

#### MANAGE FIELD GROUPS

Selecting this option will allow administrators to create new field groups and edit current field groups that are used on the query pages.

#### MANAGE PONTIS ADMINISTRATION VALUES

This option allows access to the AASHTOWare BrM administration pages. When granted this permission, administrative users will be able to edit the values and securities within their integrated BrM screens. This only applies to agencies with this function.

#### MANAGE PONTIS TO INSPECTTECH FIELD MAPPINGS

When this option is selected, administrative users can map new fields between AASHTOWare BrM and InspectTech or update existing mappings. This only applies to agencies with this function.

#### MANAGE PROJECTWISE ADMINISTRATION

With this permission, administrators are able to manage the ProjectWise screens. This only applies to agencies with this function.

#### MANAGE PROJECTWISE MAPPING

When this option is selected, administrators can map documents and other relevant files from the ProjectWise database to the InspectTech system. This only applies to agencies with this function.

#### MANAGE OWN WORKING SET

When this option is selected, users can decide which assets will be included in their working set.

#### MANAGE USER GROUPS

When this option is selected, administrators have access to the Manage User Groups page allowing them full control over the assignment of users to user groups and user groups to asset groups and views.

#### MANAGE WORKFLOWS

If this option is selected, administrators will have access to the Manage Workflows page so they can create new workflows and workflow stages, as well as edit existing workflows and workflow stages.

#### SHARE SAVED ASSET TASK FILTERS WITH OTHER USERS

Users with this permission can edit public filters and assign them to other users.

#### UPLOAD AND EDIT LOGOS

If selected, administrators can upload and add agency logos to the inspection report. Administrators can also edit the logos already uploaded to the report.

#### UPLOAD SIGNATURE IMAGES

Users are able to upload an image of their signature to their user account page. This signature can then be used in various forms throughout the system: in inspection reports

#### UPLOAD THEIR OWN CERTIFICATES

All users can access their own user account. If a user possesses a certificate relevant to their work within the agency and desires to make the certificate available to other users within the system, they can upload their certificate to their user profile or account. Administrative users can only perform this task if this option is selected.

#### VIEW AUDIT REPORTS

This option gives administrative users the authority to view audit information on the Audit Reports page.

#### VIEW IN PROGRESS MOBILE REPORTS

Selecting this option grants administrators the authority to view in progress reports currently open and being modified or completed on a mobile device. Mobile device reports would still be protected from modification from outside the device

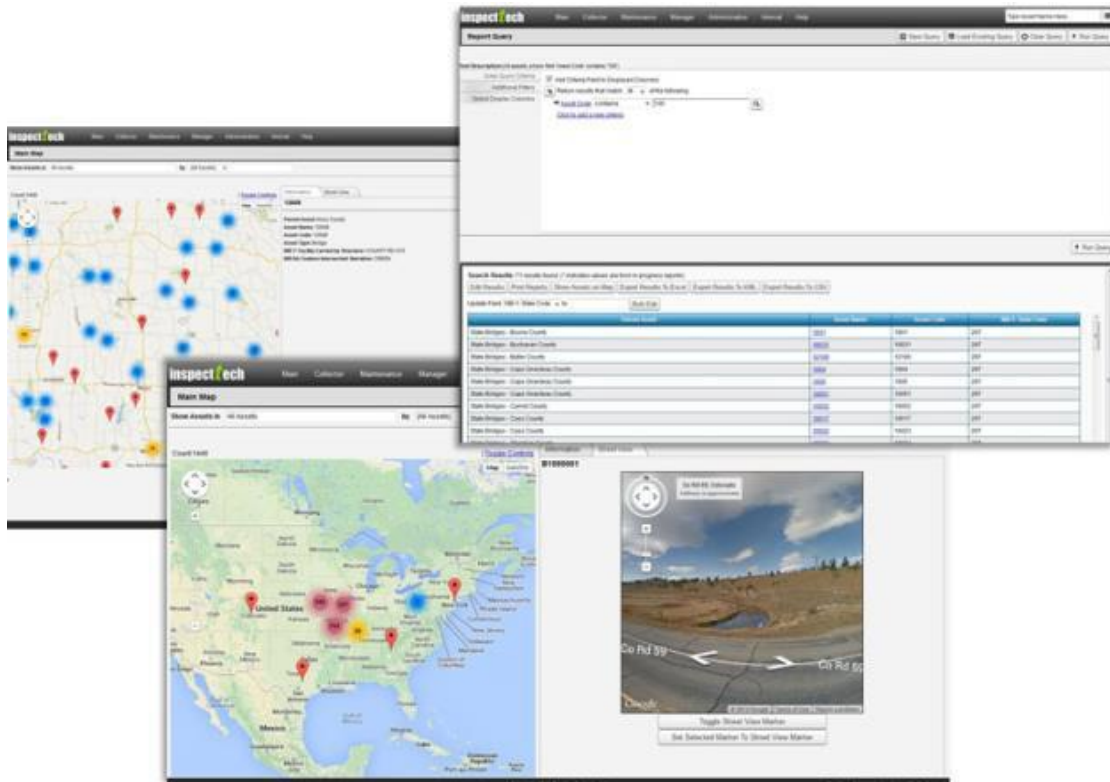
# Manager Module

## Overview

With potentially thousands of structures to manage, powerful software tools are critical to ensure effective and efficient asset management. The Manager Module is focused on retrieving, reporting on and visualizing the data that has been collected for the assets in the system. This module is typically reserved for manager level access and features advanced dashboard widgets, mapping functionality and configurable reporting and querying tools.

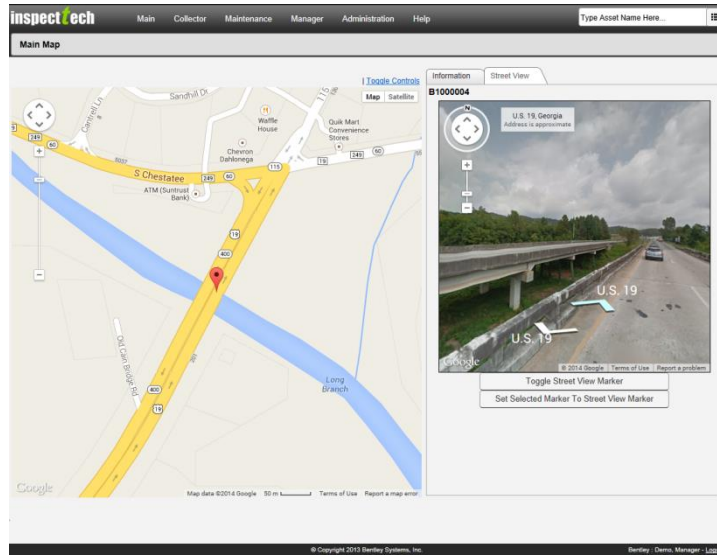
One of the most powerful capabilities of the Manager Module is the Report Query, which can be used to create reports based on any inventory and inspection data that has been collected in the system. A manager can quickly use the tool to create query criteria (Eg. All assets in Pittsburgh, or all Structurally Deficient bridges) and select what information they would like to see for each asset that meets the criteria.

The results of the Report Query can then be exported to a number of formats including XLS, CSV, and KML, viewed on the GIS map or the query can be saved for later use.

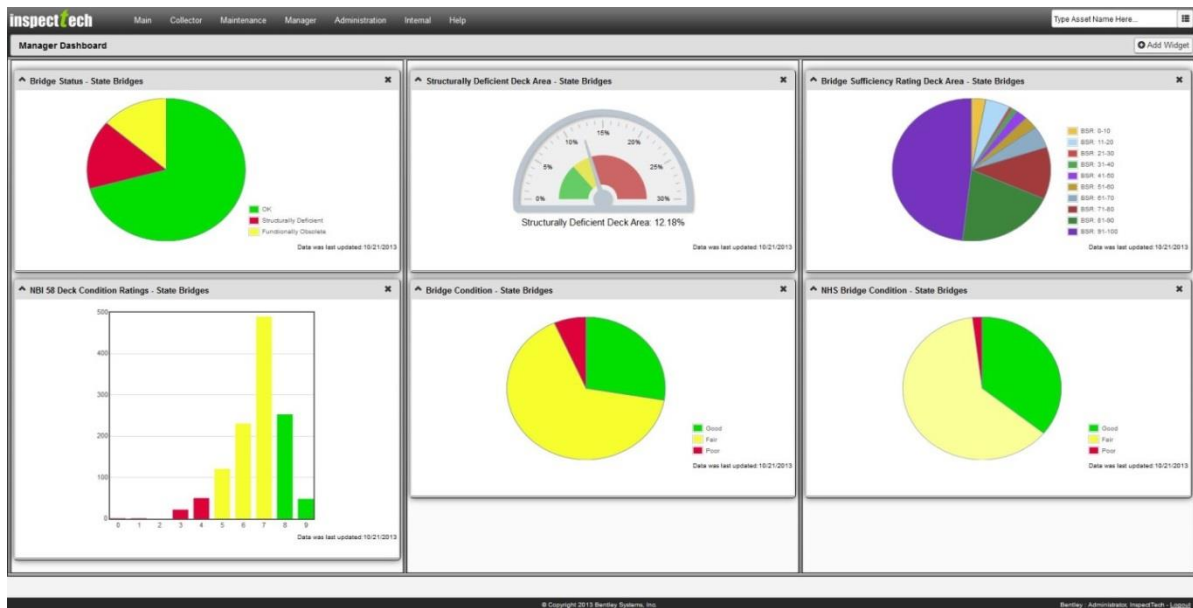


Incorporated into the Manager Module is the interactive, GIS-based mapping capability that displays the position of each asset in the system. The map allows for pinpoint accuracy in locating any asset as well as allowing the user to click on an asset to access additional information and pictures.





The Manager module also includes an executive level dashboard including graphs and charts which show performance metrics based on industry best practices for the assets in the system. Managers can choose which data they are most interested in and can configure their dashboard to display only the most important data. The graphs and charts which summarize the performance metric data can also be clicked on to allow the user to drill down into the details of the data.



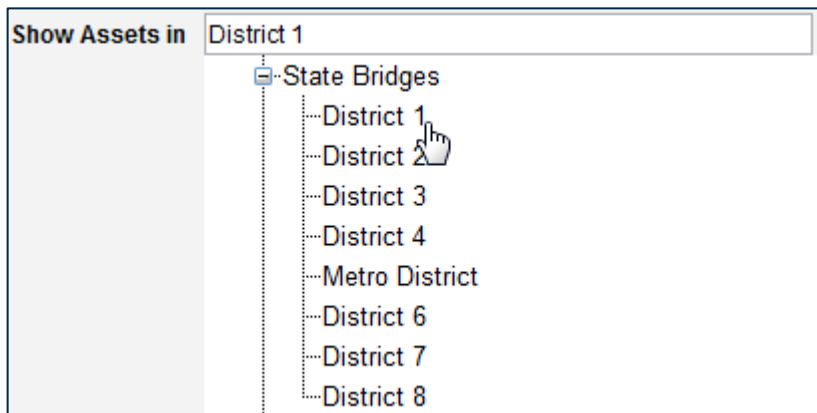
## Main Map

The Main Map in the Manager Module is used to visualize the location of every asset in the system. Each asset can have a GPS coordinate associated with it and this coordinate is used to place the asset on the map. From the map users can see all of the assets in the system they have access to and zoom the map to look at specific assets. When a specific asset is selected the right hand side of the screen will update to show the details of that asset and allows the user to jump to the asset detail page for that asset.

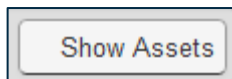
### How to Use the Map

Bentley currently uses the Google Maps widget.

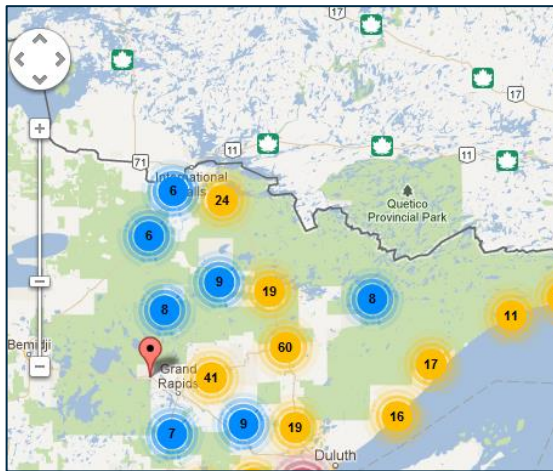
1. Select Manager > Main Map.
2. Click the Show Assets in text box to expand an asset list. Select a parent asset.



3. Click the Show Assets button to generate the interactive map.



When zoomed out the map will group some assets together and they will appear as circles showing the number of assets in that area. Zooming in will show the details of the assets.



4. Click on a circle to zoom into that cluster of assets.



5. Click the desired asset pin to generate a summarized asset detail page.

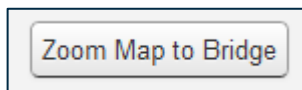


Information	Street View
<b>8765</b>	
<b>Parent Asset:</b> District 1	
<b>Asset Name:</b> 8765	
<b>Asset Code:</b> 8765	
<b>Asset Type:</b> Bridge	
<b>NBI 7: Facility Carried by Structure:</b> TH 1	

6. Click the Street View tab to view the asset in Google Maps street view.
7. View the full details of the asset by clicking the Asset Detail Page hyperlink.



8. Zoom the whole map to the asset by clicking the Zoom Map to Bridge button.



## Query Tools

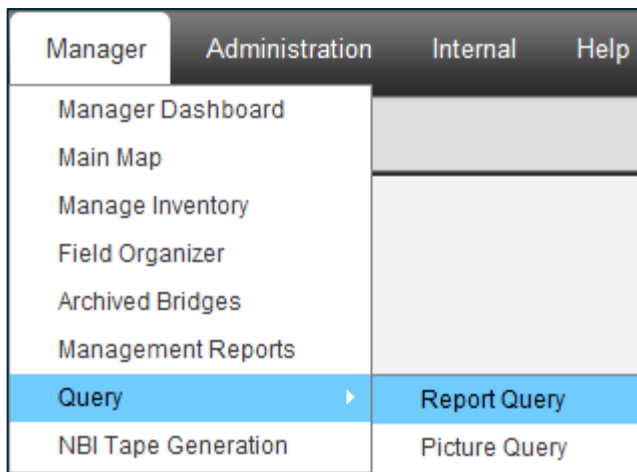
The query is used to create reports based on any inventory and inspection data that has been collected in the system. A manager can quickly use the tool to create a report of data that has been collected with specific query criteria (Eg. All assets in Pittsburgh, or all Structurally Deficient bridges) and select what information they would like to see for each asset that meets the criteria.

The results of the Report Query can then be exported to a number of formats including XLS, CSV, and KML, viewed on the GIS map or the query can be saved for later use.

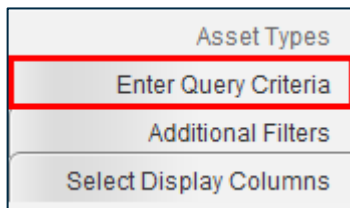
### How to Construct a Basic Report Query

The report query:

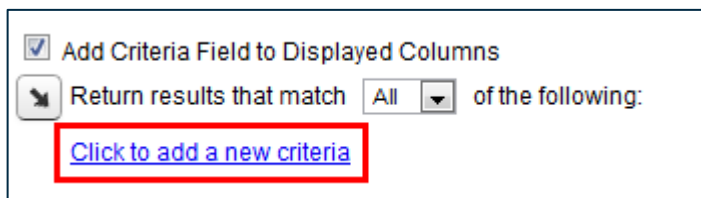
1. Select Manager > Query > Report Query.



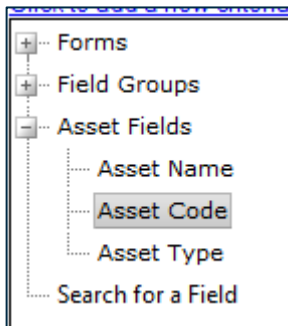
2. Select Enter Query Criteria.



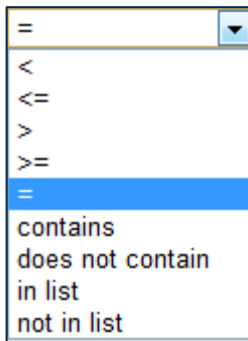
3. Select the Click to add new criteria link.



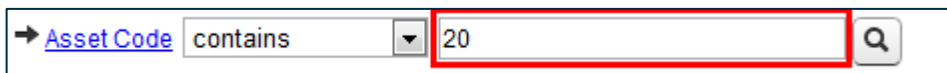
4. Use the tree search to locate the field for the query, or click Search for a Field to type the name of the field into a search bar.




5. Enter the parameters for the filter.

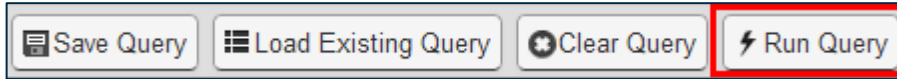


6. Enter the value parameter.



7. Click the search icon (  ) to the right for help in choosing what values may be entered for the field selected.
8. Repeat steps 2 - 7 to add more criteria to the query.

9. Click the Run Query button at the top right-hand corner of the page.



Search Results: 6 results found. (\* indicates values are from in progress reports)

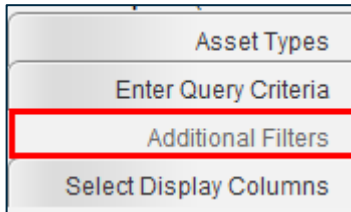
Edit Results Print Reports Show Assets on Map Export Results To Excel Export Results To KML Export Results To CSV

Update Field CrewHours to Bulk Edit

Parent Asset	Asset Name	CrewHours	Date Opened to Traffic
City Bridges - Beaver Creek	<a href="#">L4648</a>		01/01/1911
County Bridges - Fillmore	<a href="#">89795</a>		11/01/1911
County Bridges - Hennepin	<a href="#">80449*</a>	1	01/01/1911
Township Bridges - Carrolton Twp	<a href="#">L4710</a>		11/01/1911
Township Bridges - Hokah Twp	<a href="#">L4580</a>		01/01/1911
Township Bridges - Newburg Twp	<a href="#">L4678</a>		11/01/1911

## Adding Additional Filters to the Report Query

1. Select Manager > Query > Report Query.
2. Click the Additional Filters from the menu.



- Values Returned

Returns the assets with their asset values (the most recent values) or their historical report values.

**Values Returned:**

- Return assets and their central database values
  - Use in progress report values where available.
- Return assets with historical report values

Set the checkbox labeled Use in progress report values where available to pull values from in progress reports. **The default setting is asset values with that additional checkbox selected.**

- Records displayed on each result page:

**Records displayed on each result page**

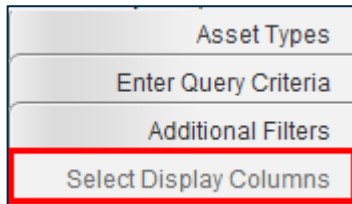
Records Displayed:

Determines the number of records displayed on each result page. **The default setting is 200 records per page**, but you can change this number accordingly.

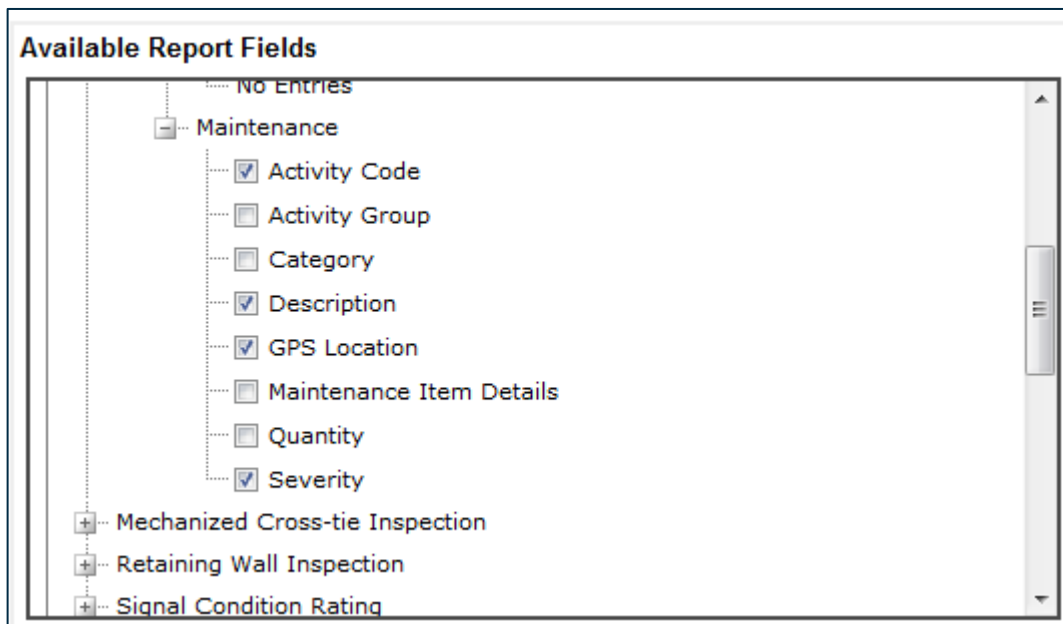


## Select Display Columns for the Report Query

1. Click the Select Display Columns tab from the menu.



2. Locate the desired fields via the tree search.



3. Include the field by setting the checkbox next to it.
4. Click on the small black arrow to add the fields as displayed columns.

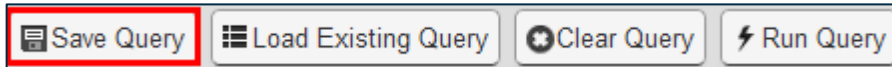


5. Click Run Query to view results with the new display columns.

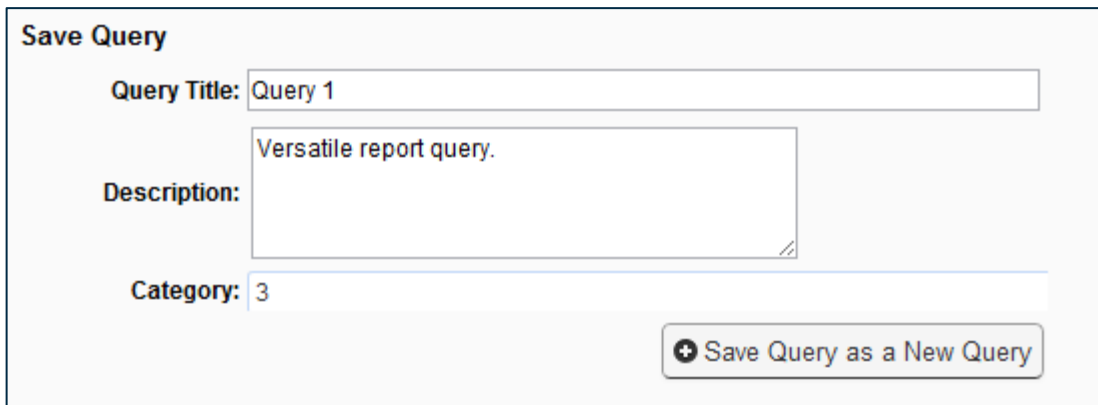
## How to Save a Query

Saving queries allows you to store the query definition and quickly run it again in the future.

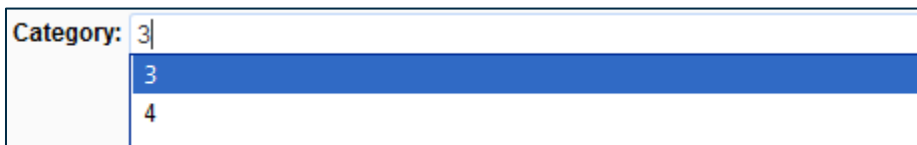
1. With a query constructed that you want to save, click the Save Query button.



2. Give the query a title and a description.

A screenshot of a 'Save Query' dialog box. It contains three input fields: 'Query Title' with the value 'Query 1', 'Description' with the value 'Versatile report query.', and 'Category' with the value '3'. A 'Save Query as a New Query' button is located at the bottom right of the dialog.

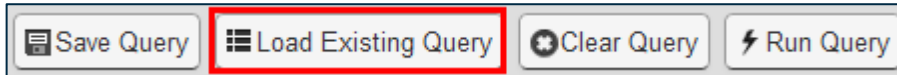
3. Click the Category text box to add the query to a category.

A screenshot of a dropdown menu for the 'Category' field. The menu is open, showing a list of options: '3' (which is highlighted in blue) and '4'.

4. Click Save Query as a New Query.

## How to Load a Saved Query

1. From the Report Query page click Load Existing Query.



2. Filter the list of saved queries.

**Load a Saved Query**

User: Administrator, InspectTech ▼

Category: All Categories ▼

Name	Category:	Description			
Query 1	3	<a href="#">View</a>	<a href="#">Run</a>	<a href="#">Edit</a>	<a href="#">Delete</a>

3. Click Edit to edit the query's criteria.
4. Click Run to run the query directly from the Load a Saved Query dialog box.

## How to Edit Query Results

The Edit Query results functionality is typically restricted to administrators but allows users to edit the stored values for assets and report directly in the results grid.

1. Click Edit Results.

Search Results: 2 results found.

**Edit Results** Print Reports Show Assets on Map Export Results To Excel Export Results To KML Export Results To CSV

2. Click inside one of the textboxes.

Search Results: 2 results found.

Done Editing Print Reports

Asset Name	Asset Code	Activity Code	Description	GPS Location	Severity	Asset Type
<a href="#">NSW-GW-ET-SI-SM9220-7.4-C-S9220</a>	NSW-GW-ET-ST-SM9220-7.4-C	101.08			Address Before Next Inspection	Special Trackwork
<a href="#">NSW-TC-ET-SI-SM9220-7.4-C-Switch Machine</a>	NSW-TC-ET-ST-SM9220-7.4-C	101.09			Monitor	Switch Machine

3. Select a value from the drop down or type in a new value.

Severity

Monitor

Immediate Action Required

Address Before Next Inspection

Monitor

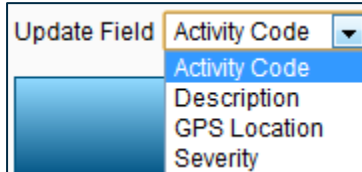
4. Click Done Editing.

**Done Editing** Print Reports

## How to Bulk Edit Query Results

The bulk edit feature is also typically restricted to administrators and allows the user to change the value of a single field to a specific value for all assets in the query result set.

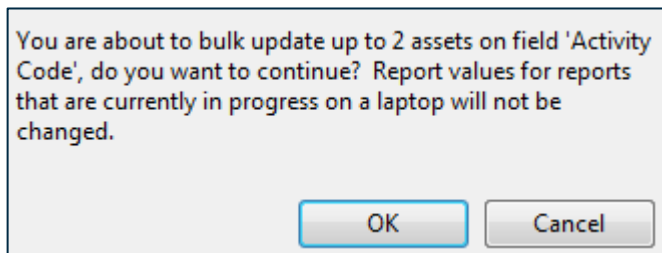
1. Select a field column from the list labeled Update Field.



2. Type a new value into the textbox.

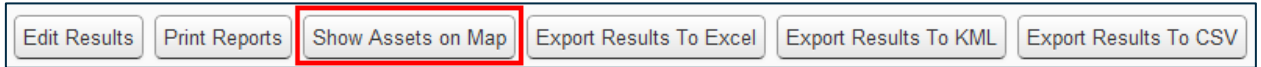


3. Click Bulk Edit.
4. Click OK to continue.

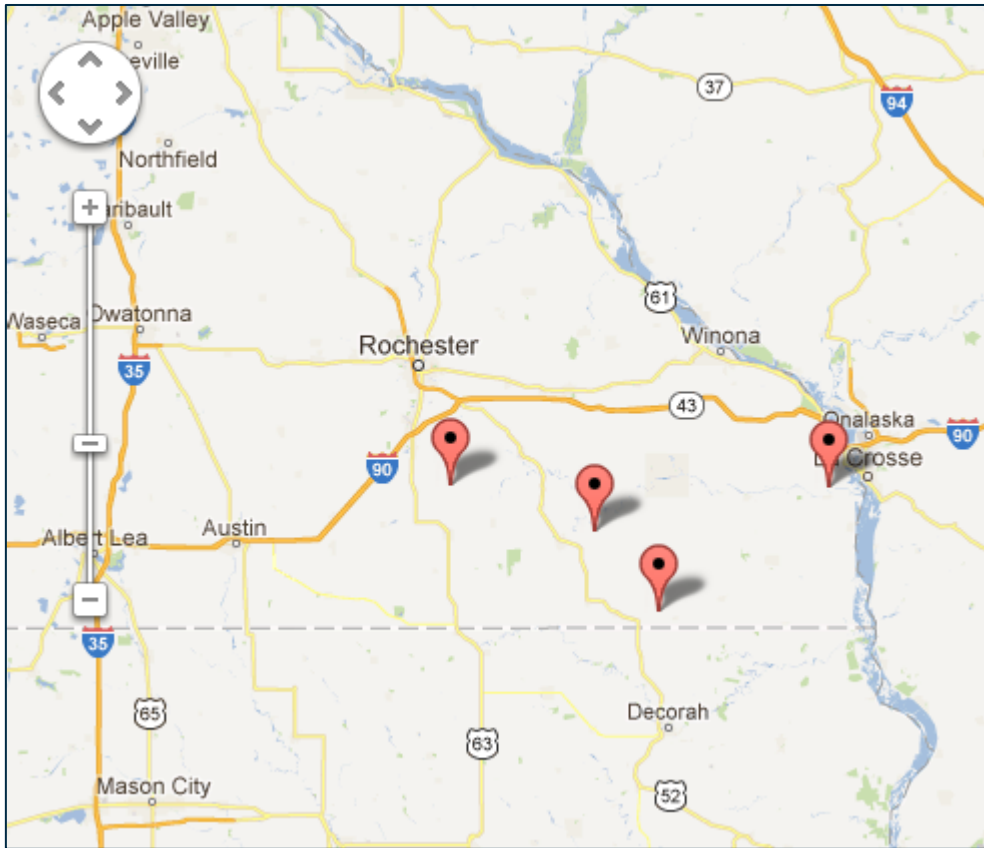


## How to Show Results on a Map

Select Show Assets on a Map.

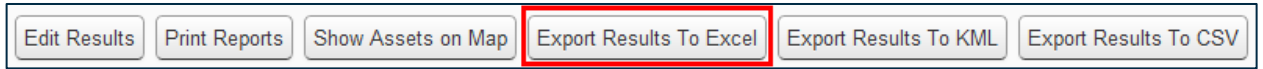


The mapping tool will open in a new tab.



## How to Export Results to Excel

1. Click the Export Results to Excel button to download an Excel file.

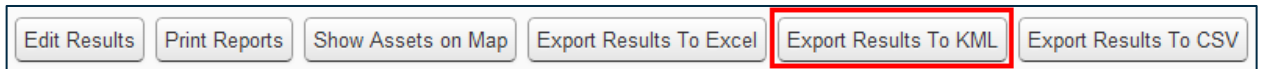


	A	B	C	D	E	F	G
1	<b>Parent Asset Name</b>	<b>Asset Name</b>	<b>CrewHours</b>	<b>Date Opened to Traffic</b>	<b>Inspection Date</b>		
2	City Bridges - Beaver Creek	L4646		1/1/1911 0:00			
3	County Bridges - Fillmore	89795		11/1/1911 0:00			
4	County Bridges - Hennepin	90449	1	1/1/1911 0:00	9/14/2011		
5	Township Bridges - Carrolton Twp	L4710		11/1/1911 0:00			
6	Township Bridges - Hokah Twp	L4560		1/1/1911 0:00			
7	Township Bridges - Newburg Twp	L4678		11/1/1911 0:00			
8							

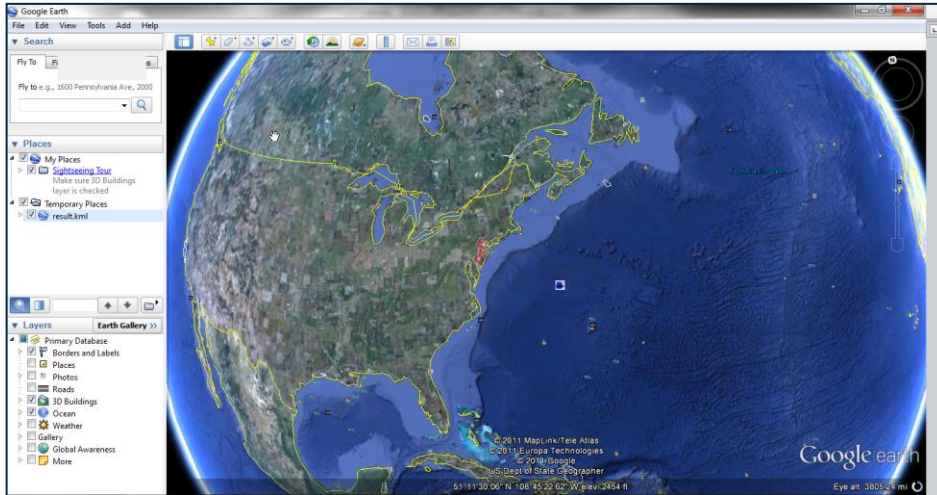
2. Save the Excel file to your computer.

## How to Export Results to KML

1. Click Export Results to KML.



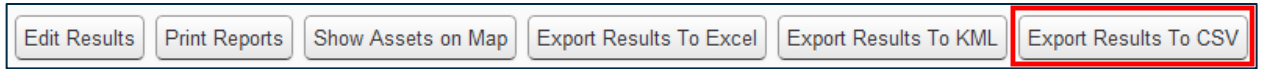
2. View the query results via a mapping system, such as Google Earth.



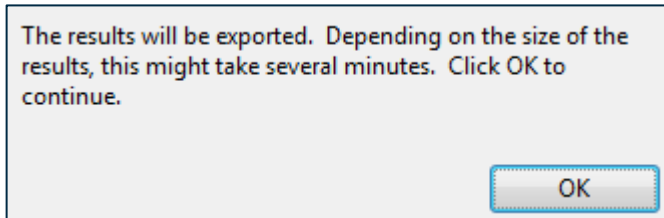


## How to Export Results to CSV

1. Click the Export Results to CSV button.



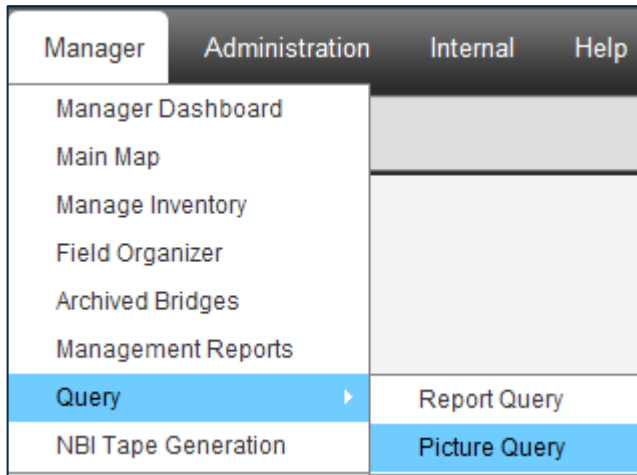
2. Click OK to continue.



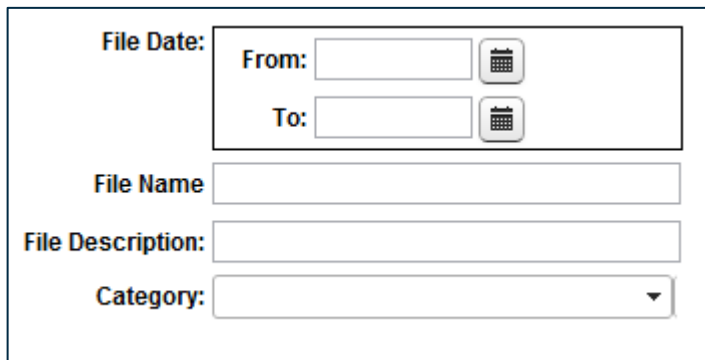
## How to Build a Picture Query

The picture query is very similar to the Report Query but allows the user to retrieve pictures that have been uploaded to assets and reports.

1. Select Manager > Query > Picture Search.

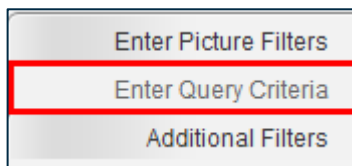


2. Create filters to narrow the query results.



A screenshot of a filter creation form. The form contains several input fields and a dropdown menu. The first section is labeled 'File Date:' and contains two rows: 'From:' with a text input field and a calendar icon, and 'To:' with a text input field and a calendar icon. Below this is a 'File Name' text input field, followed by a 'File Description:' text input field, and finally a 'Category:' dropdown menu.

3. Select Enter Query Criteria from the list.



4. Enter criteria for the query (see page 21 for detailed instructions).

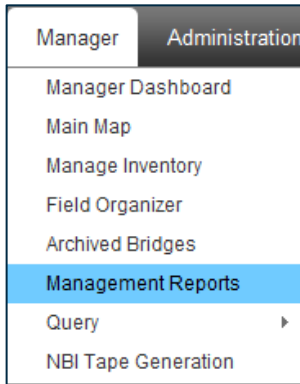
Add Criteria Field to Displayed Columns  
Return results that match  of the following:  
→ [Asset Code](#) =    
[Click to add a new criteria](#)

5. Click Run Query.

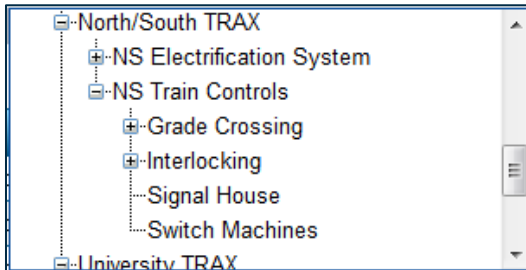
# Management Reports

## How to Run a Management Report

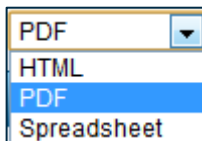
1. Select Manager > Management Reports.



2. Click the textbox labeled Parent Asset.
3. Select the desired parent asset from the asset tree filter.



4. Select the Output Type.



5. Click Run Report next to the desired system report category.

Report	Description	
Next 2 Months	Shows all bridges due in the next 2 months	<a href="#">run report</a>
Past Due	Shows all bridges past their inspection due date	<a href="#">run report</a>



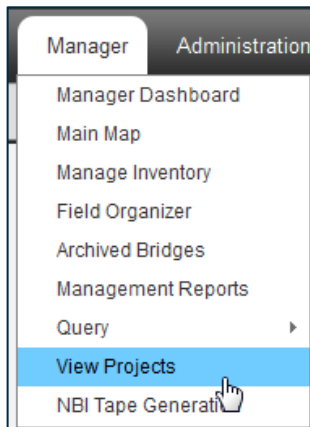
## Projects

The Projects functionality is designed to allow agencies to track their inspection projects from cycle to cycle. There are 3 new business objects that can be created in the projects module: Projects, Work Specifications, and Supplemental Work Specifications. These will exist in a hierarchy where projects are the parent, work specs are children of the project and supplemental work specs are children of the work spec. Projects can be thought of as the overall contract that an agency may have with a consulting firm to complete inspections. A work spec describes a set of inspections that are to be completed. And a supplemental work spec can be used to track any change orders made to the work specs.

Each project in the system will need to have at least one work spec created for it. Once the work spec is created assets can then be linked to the work spec. When a user creates an inspection report for an asset that is in a work spec the user has the option to attach that report to the work spec. This allows an agency to track all the reports that are going on for the project and work spec.

### How to Manage Projects

1. Select Manager > View Projects.



2. Click the plus sign to expand the desired project.

**View Projects** Manage Security New Project Save Project Delete Project

Filter on:  Filter

- 000 Test Bridges ABC
  - 001 Test Bridges
  - 002 Test Bridges
  - 003 East End Bridges
    - 003-1 Work Spec
      - 003-1-A Supp Work Spec
      - 003-2 Work Spec
  - 113 Union County Culverts
  - 116 Burlington County Minor Bridges
  - 119 Mercer County Culverts
  - 140 Warren County Minor Bridges
  - 141 Union County Minor Bridges
  - 171 Burlington County Culverts
  - 250 Warren County Culverts
  - Abedini Hossein Project
  - Morris County Bridges
  - Plowey Project
  - SAA Project
  - Tests
  - Tom Test 1

**003 East End Bridges**

Name:  (required)

Start Date:  (required)

End Date:  (required)

Status:

---

*M130 Project Name:*

*(HF) State Project Manager:*

*(CK) State Assistant PM:*

*County Project Manager:*

*(HE) NTP Date CY01:*

*(HE) NTP Date CY02:*

*(HD) 2-Cycle Contract:*

---

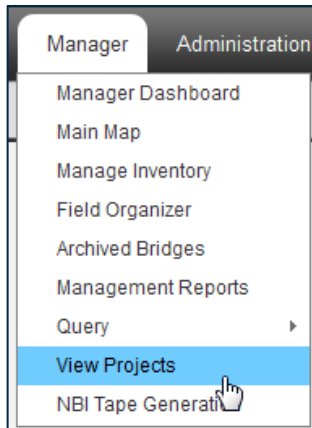
**Work Specifications** Add Work Spec

Work Spec. Name	Start Date	End Date	Status	
003-1 Work Spec	05/06/2013	05/24/2013	Open	<input type="button" value="View"/>
003-2 Work Spec	04/22/2013	05/10/2013	Open	<input type="button" value="View"/>

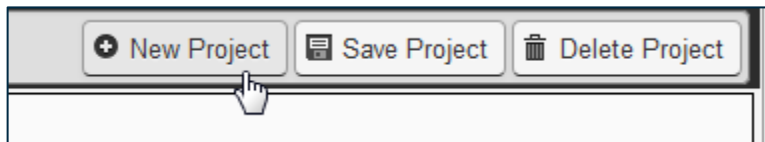
3. View or edit the project's information.

## How to Create a Project

1. Select Manager > View Projects.



2. Click the New Project button.



3. Type the new project's information into the form.

**New Project**

Enter the information below to create a new Project

Name:  (required)

Start Date:  (required)

End Date:  (required)

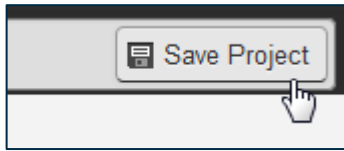
Status:

August 2013

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

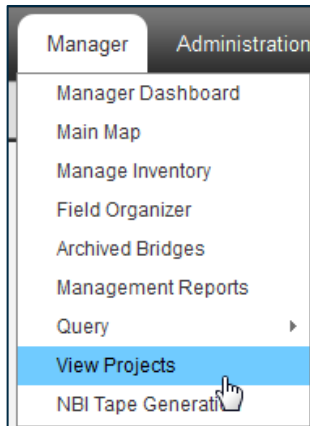


4. Click Save Project.

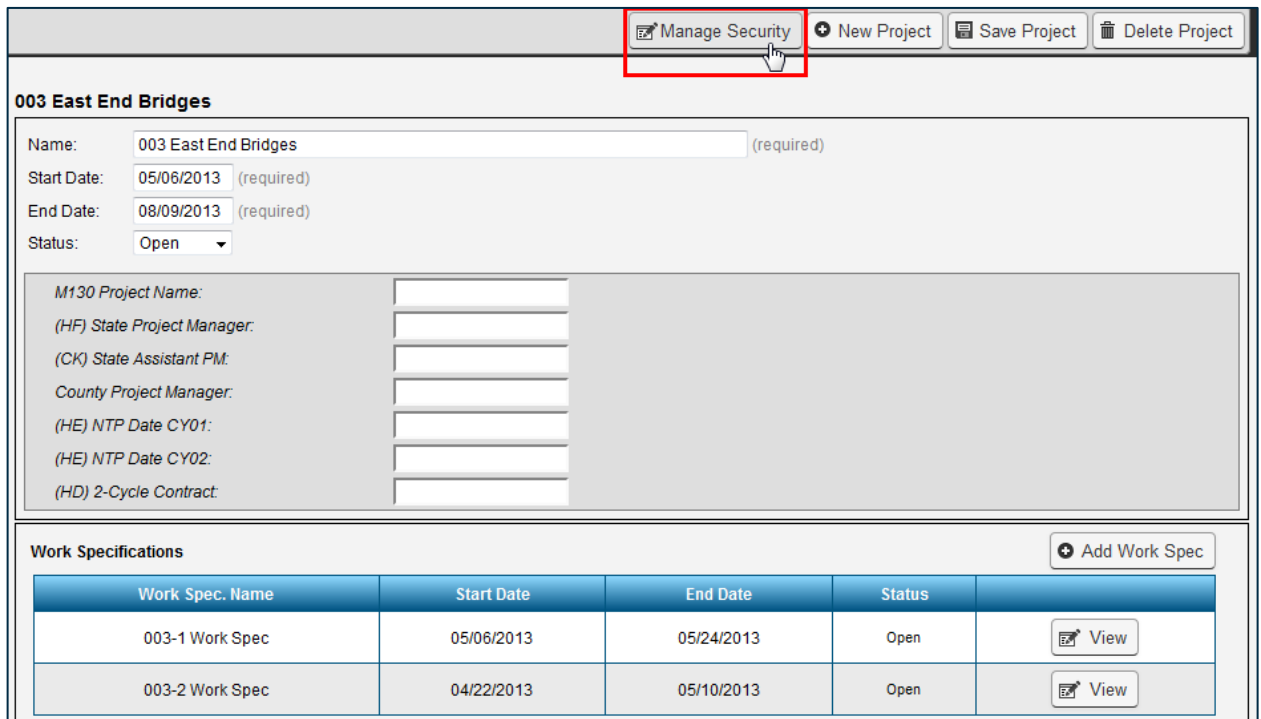


## How to Manage Project Security

1. Select Manager > View Projects.



2. Locate the desired project.
3. Click the Manage Security button along the top bar.

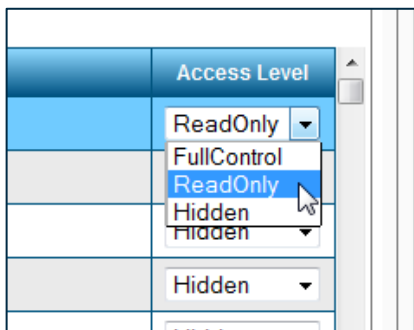
A screenshot of a web application interface for managing projects. The top bar contains several buttons: 'Manage Security' (highlighted with a red box), 'New Project', 'Save Project', and 'Delete Project'. Below the top bar, the main content area is titled '003 East End Bridges'. It contains a form with the following fields: 'Name: 003 East End Bridges (required)', 'Start Date: 05/06/2013 (required)', 'End Date: 08/09/2013 (required)', and 'Status: Open'. Below these fields are several input fields for project details: 'M130 Project Name:', '(HF) State Project Manager:', '(CK) State Assistant PM:', 'County Project Manager:', '(HE) NTP Date CY01:', '(HE) NTP Date CY02:', and '(HD) 2-Cycle Contract:'. At the bottom of the form, there is a 'Work Specifications' section with an 'Add Work Spec' button. This section contains a table with two rows of work specifications.

Work Spec. Name	Start Date	End Date	Status	
003-1 Work Spec	05/06/2013	05/24/2013	Open	<a href="#">View</a>
003-2 Work Spec	04/22/2013	05/10/2013	Open	<a href="#">View</a>

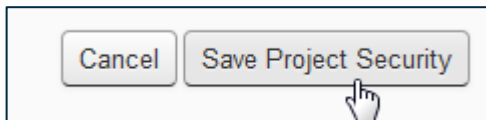
4. Choose the roles, users, and profiles you wish to link with the project.
  - To link assets and their reports to a project, you must first create a work specification.

<input checked="" type="checkbox"/>	All users of role: Administrator
<input type="checkbox"/>	All users of role: Collector Access
<input checked="" type="checkbox"/>	All users of role: Consultant Certifying Engineer / Project Manager
<input checked="" type="checkbox"/>	All users of role: Consultant Team Leader

5. Select each role, user, and profile's security level from the menu in the column labeled Access Level.



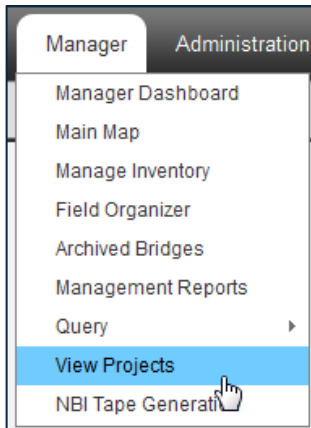
6. Click the Save Project Security button.



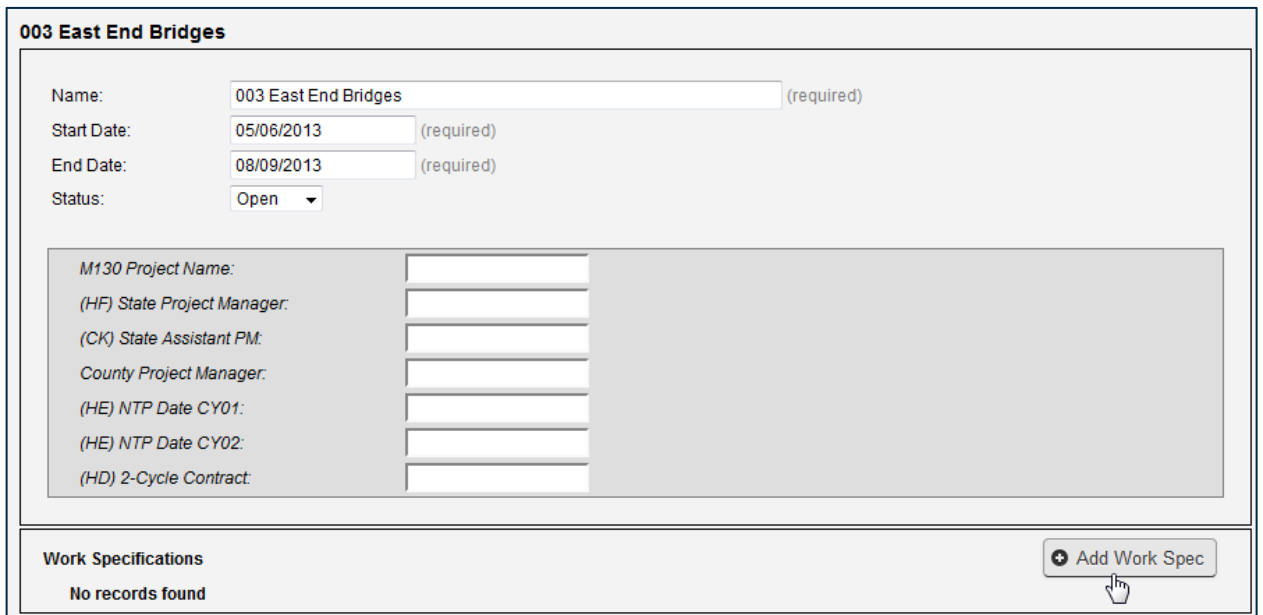
7. Click the Cancel button to close the dialog box without saving.

## How to Add Work Specifications to a Project

1. Select Manager > View Projects.



2. Click the desired project to view its information.
3. Click the Add Work Spec button.

A screenshot of a web form titled '003 East End Bridges'. The form contains several input fields: 'Name' (003 East End Bridges), 'Start Date' (05/06/2013), 'End Date' (08/09/2013), and 'Status' (Open). Below these fields is a section for project details with labels like 'M130 Project Name', '(HF) State Project Manager', '(CK) State Assistant PM', 'County Project Manager', '(HE) NTP Date CY01', '(HE) NTP Date CY02', and '(HD) 2-Cycle Contract', each followed by an empty input field. At the bottom of the form, there is a section for 'Work Specifications' which currently shows 'No records found'. A button labeled '+ Add Work Spec' is located in the bottom right corner, with a mouse cursor pointing at it.

4. Enter the new work specification's details.


**New Work Specification**

Enter the information below to create a new Work Specification

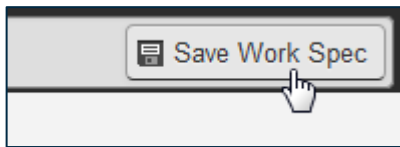
Name:  (required)

Start Date:  (required)

End Date:  (required)

Status: 

5. Click the Save Work Spec button.



6. Peruse, edit, or add to the new work specification's information.

**003-1 Work Spec**

Name:  (required)

Start Date:  (required)

End Date:  (required)

Status:

Contract ID:

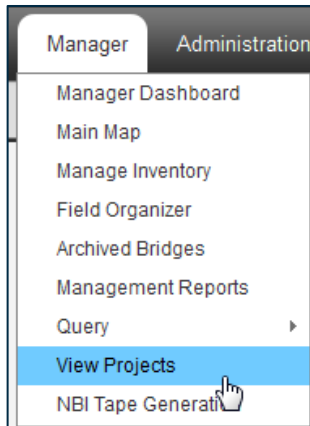
Contract Date:	<input type="text"/>	(BM) Federal Job Number:	<input type="text"/>
Group Number:	<input type="text"/>	(BN) State Job Number:	<input type="text"/>
M87 Contract State Agreement No.:	<input type="text"/>	(CM) Current Consultant:	<input type="text"/>

Supplemental Work Specifications + Add Supplemental Work Spec

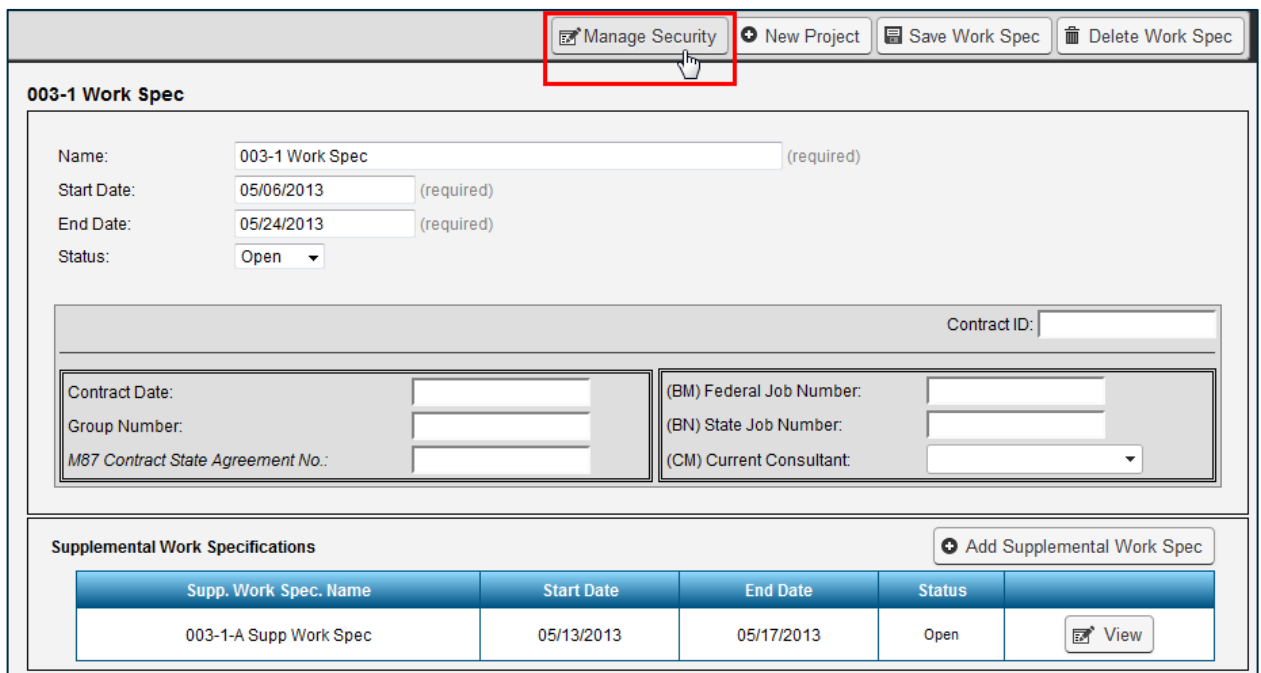
No records found

## How to Manage Work Specification Security

1. Select Manager > View Projects.



2. Locate the desired work specification from within its parent project.
3. Click the Manage Security button along the top bar.

A screenshot of a web application interface for managing work specifications. The top bar contains buttons for 'Manage Security' (highlighted with a red box), 'New Project', 'Save Work Spec', and 'Delete Work Spec'. The main content area is titled '003-1 Work Spec' and contains a form with the following fields:

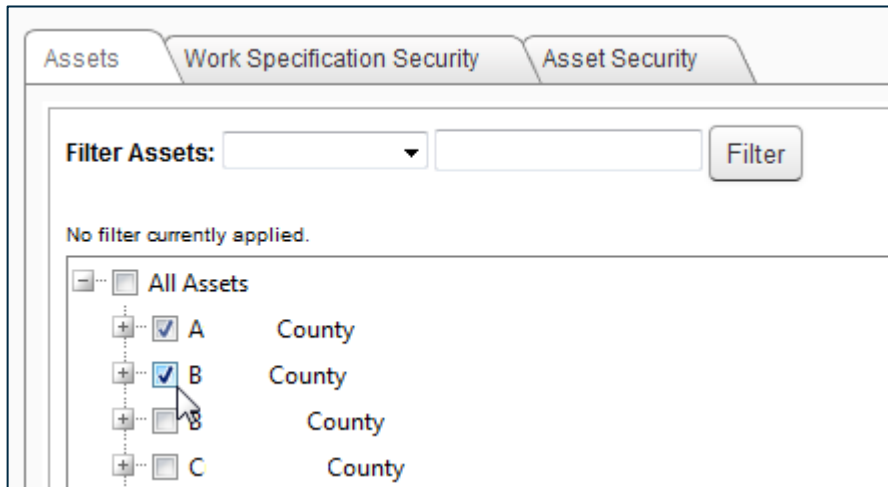
- Name: 003-1 Work Spec (required)
- Start Date: 05/06/2013 (required)
- End Date: 05/24/2013 (required)
- Status: Open
- Contract ID: [text input]
- Contract Date: [text input]
- Group Number: [text input]
- M87 Contract State Agreement No.: [text input]
- (BM) Federal Job Number: [text input]
- (BN) State Job Number: [text input]
- (CM) Current Consultant: [dropdown menu]

Below the form is a section titled 'Supplemental Work Specifications' with a table and an 'Add Supplemental Work Spec' button. The table has the following data:

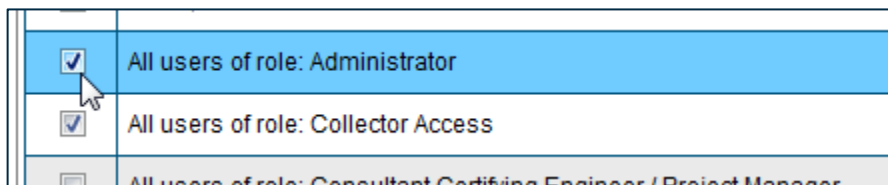
Supp. Work Spec. Name	Start Date	End Date	Status	
003-1-A Supp Work Spec	05/13/2013	05/17/2013	Open	<a href="#">View</a>

4. Select the Assets tab.

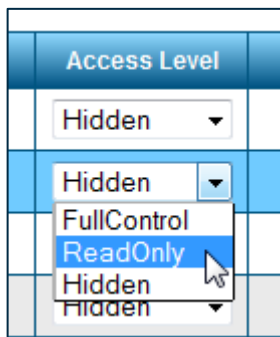
5. Choose the assets you wish to associate with the work specification.



6. Select the Work Specification Security tab.
7. Select the profiles, users, or roles you wish to assign to the work specification.



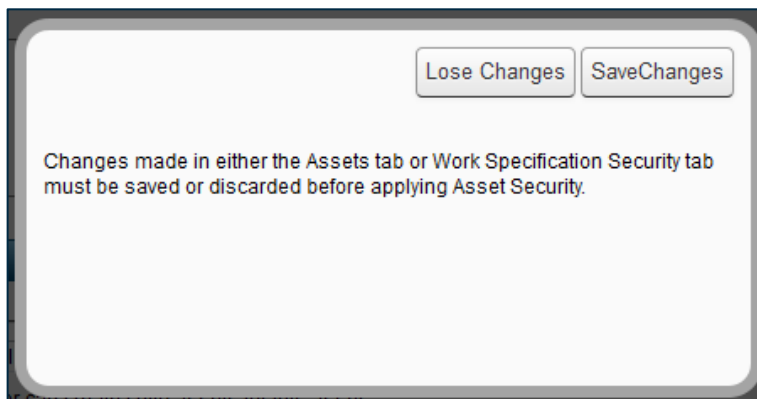
8. Identify each profile, user, or role's permission level via the menu in the Access Level column.



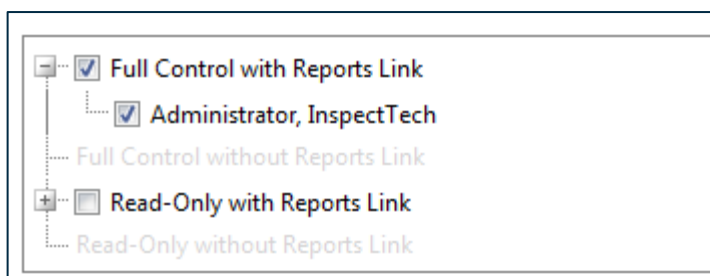
9. Select the Link Reports to Work Spec. checkbox to group related inspection reports with the work specification.
  - This checkbox is only enabled if the user, role, or profile has Full Control or Read Only access levels.

Access Level	Link Reports to Work Spec.
Hidden	<input type="checkbox"/>
Hidden	<input type="checkbox"/>
ReadOnly	<input checked="" type="checkbox"/>
Hidden	<input type="checkbox"/>
FullControl	<input checked="" type="checkbox"/>
Hidden	<input type="checkbox"/>

10. Select the Asset Security tab.
11. Click the Save Changes button in the prompt.

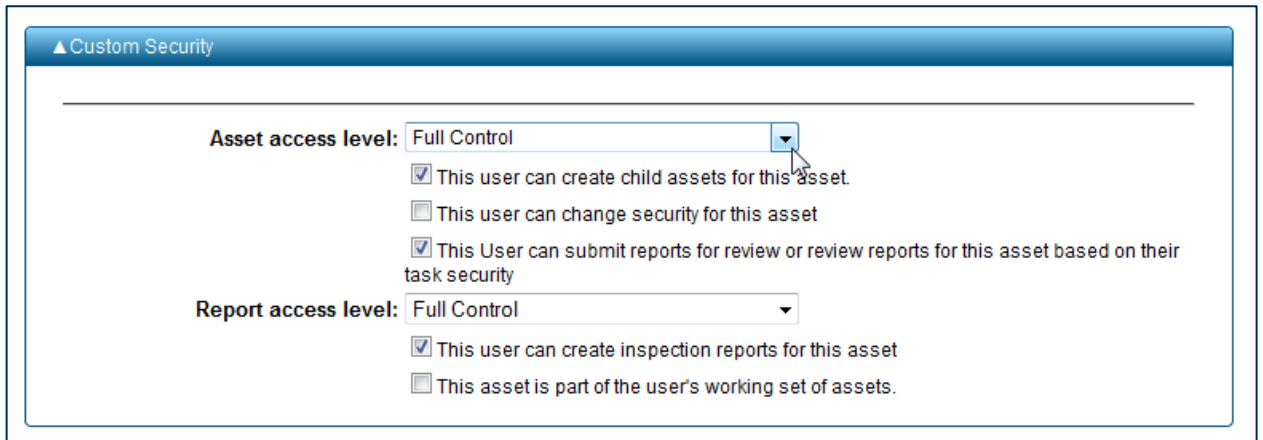


12. Select the access levels to which you are applying the security.

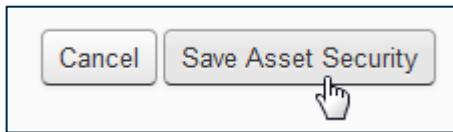


13. Select the permission levels options for the assets and users within that access level.





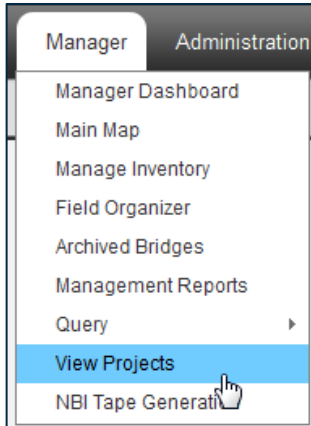
14. Click the Save Asset Security button.



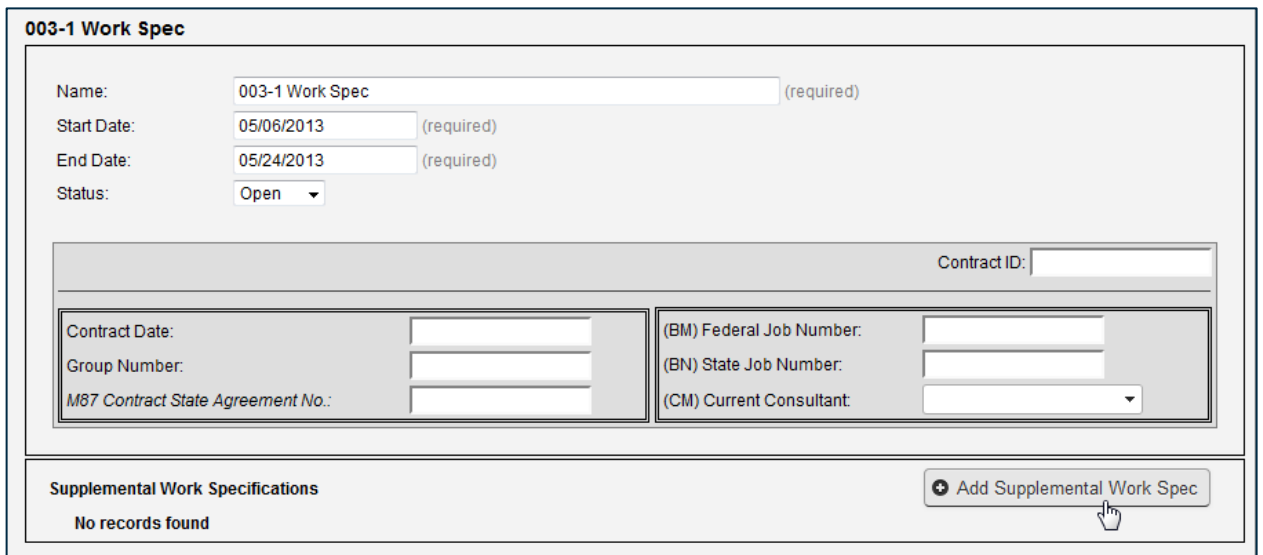
15. Once the security levels are saved, click the Cancel button to exit the dialog box.

## How to Add Supplemental Work Specifications

1. Select Manager > View Projects.



2. Click to expand the desired project.
3. Select the applicable work specification.
4. Click the Add Supplemental Work Spec button.

A screenshot of a web form titled '003-1 Work Spec'. The form contains several input fields: 'Name' (003-1 Work Spec), 'Start Date' (05/06/2013), 'End Date' (05/24/2013), and 'Status' (Open). Below these are fields for 'Contract ID', 'Contract Date', 'Group Number', 'M87 Contract State Agreement No.', '(BM) Federal Job Number', '(BN) State Job Number', and '(CM) Current Consultant'. At the bottom of the form, there is a section titled 'Supplemental Work Specifications' with the text 'No records found' and a button labeled '+ Add Supplemental Work Spec'. A mouse cursor is pointing at the button.

5. Enter the new supplemental work specification's details.

**New Supplemental Work Specification**

Enter the information below to create a new Supplemental Work Specification

Name:  (required)

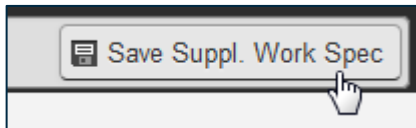
Start Date:  (required)

End Date:  (required)

Status:

May 2013						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

6. Click the Save Suppl. Work Spec button.



7. Peruse, edit, or add to the supplemental work specification's information.

**003-1-A Supp Work Spec**

Name:  (required)

Start Date:  (required)

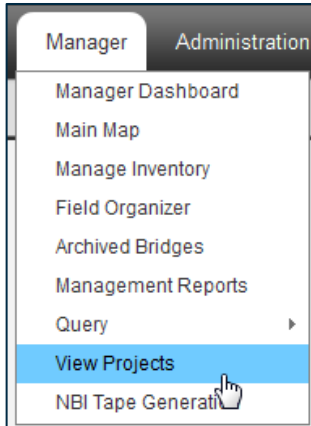
End Date:  (required)

Status:

Agreement Modification Number:	Total Contract Amount:	Current Amendment Amount:	Contractor Name:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## How to Delete Projects and Specifications

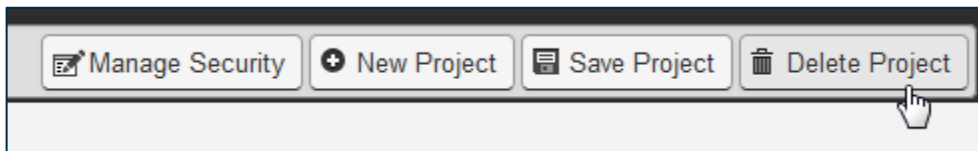
1. Select Manager > View Projects.



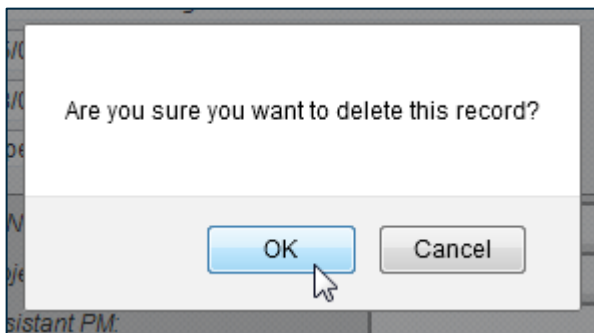
### Projects

1. Select the project to open its information.
2. Click the Delete Project button.

**Note: All supplemental work specifications within the work specification will be deleted.**

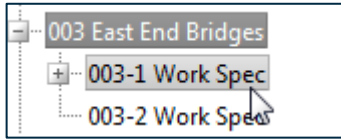


3. Click OK to confirm.



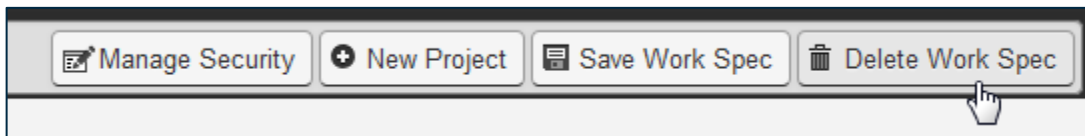
## Work Specifications

1. Click the plus sign to expand the desired project.
2. Select the work specification to open its information.



3. Click the Delete Work Spec button.

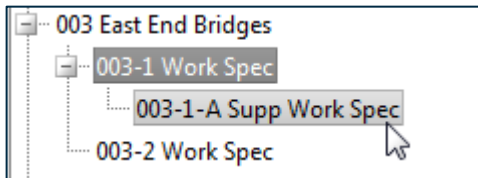
**Note: All supplemental work specifications within the work specification will be deleted.**



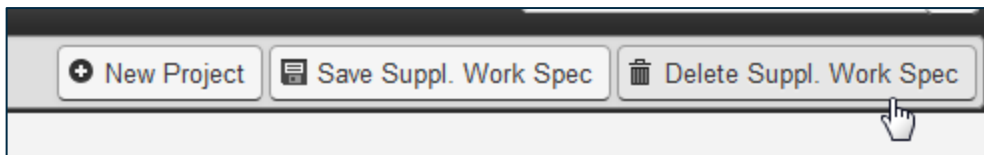
4. Click OK to confirm.

## Supplemental Work Specifications

1. Click the plus sign to expand the desired project.
2. Click the plus sign to expand the desired work specification.
3. Select the supplemental work specification to open its information.



4. Click the Delete Suppl. Work Spec button.



5. Click OK to confirm.

# Contact Information

Bentley takes great pride in their customer support.

Email	<a href="mailto:tsginspecttechamericas@bentley.com">tsginspecttechamericas@bentley.com</a>
Phone	412.681.1521

When sending an email for support please include a detailed description of what you are experiencing along with the asset and or report, URL and steps to reproduce.

For further help and support discussion, visit [InspectTech's Be Community site](#) and interact with InspectTech developers and fellow users.