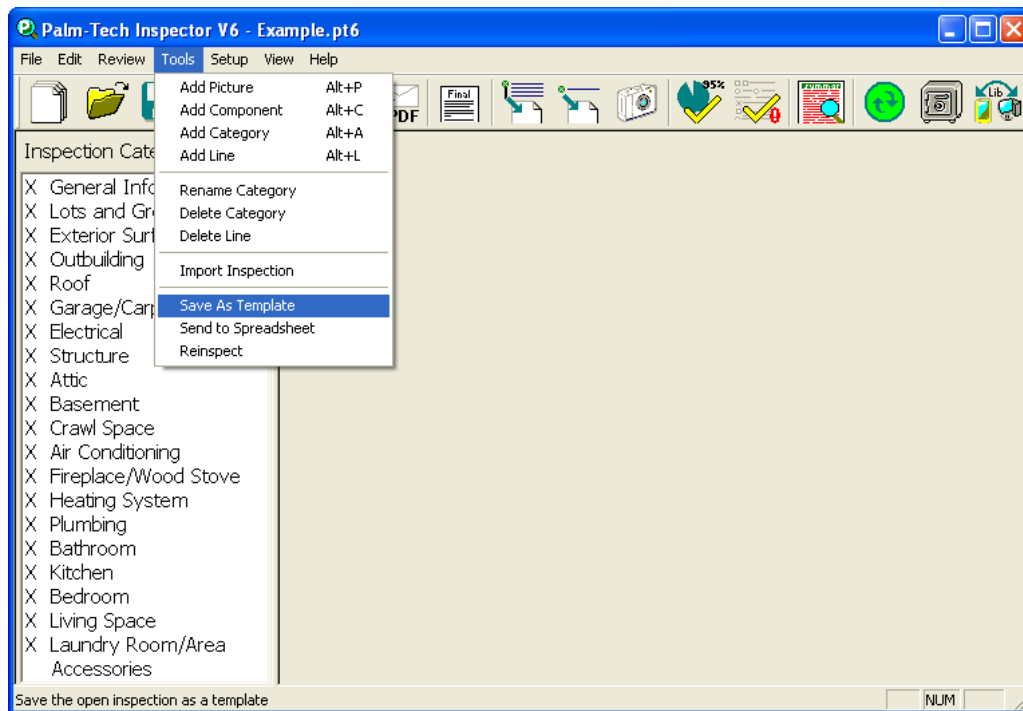
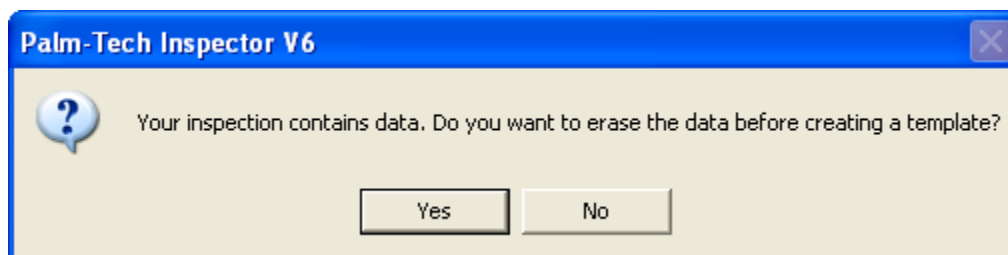


This outline will show you how to save an open inspection as a template in easy step by step instructions. This eliminates the need to repeat changes each time you begin a new inspection.

1. Save your report by selecting File -> Save or click on the icon near the top that looks like a floppy disk.
2. From the menu choose 'Tools' -> Save As Template.



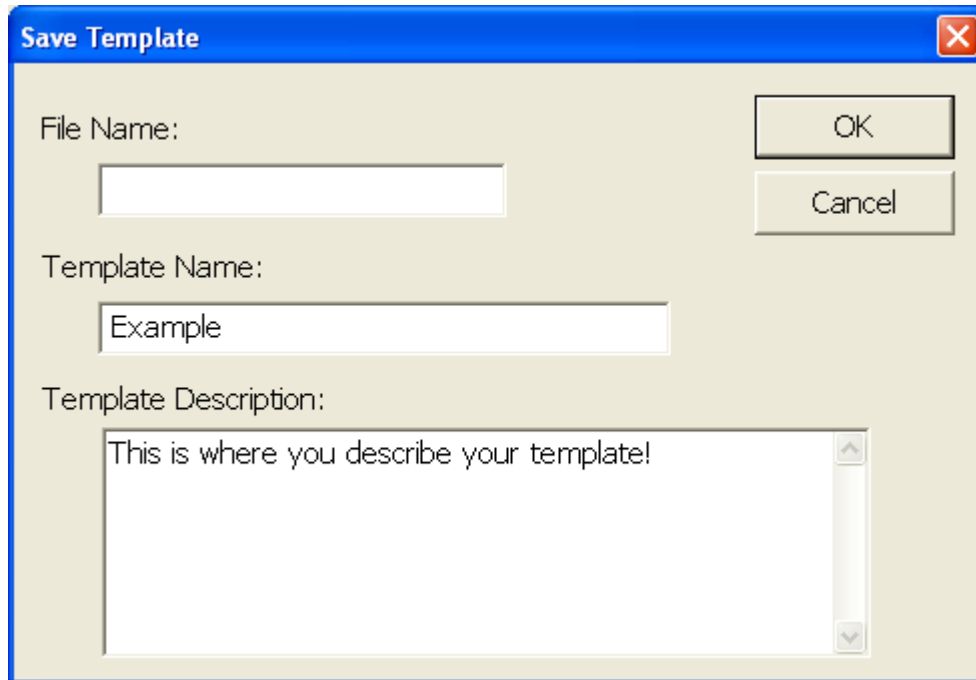
3. If your inspection contains answer data (ie ratings, descriptions, notes, etc), you will be prompted asking if you want to erase the data from the inspection first. Click 'Yes' and the answers will be erased. Click 'No' to keep the answers. Choose carefully, based on your needs.



How to: Save an Inspection as a Template

4. The next window that you will see is the 'Save Template' window. This is where you will give your template a name and a brief description. You should not save custom templates using the default Palm-Tech template file names.

After you have entered your answers, click on 'Ok'.



The image shows a 'Save Template' dialog box with a blue title bar. The dialog contains three input fields: 'File Name:' with an empty text box, 'Template Name:' with a text box containing 'Example', and 'Template Description:' with a text area containing 'This is where you describe your template!'. To the right of the 'File Name' field are 'OK' and 'Cancel' buttons.

5. After the template is created, a window will appear asking if you wish to transfer this template to a handheld device. If you want to use this template on your Pocket PC, connect your Pocket PC if it isn't already connected (be sure to wait 10-20 seconds for it to connect). Click on 'Yes' and you will see a window showing you the progress of the transfer. When it finishes you will be notified that the template has been sent to the handheld device.
6. You have finished. The next time you start a new inspection, your customized template will be listed in the Choose Template window.