

This How to article will show you how to start a new inspection on the Palm-Tech App.

Starting a New Inspection on the Palm-Tech App

1. The first step is to open the App by clicking on the PDmB App from your App menu.
2. You are now looking at the opening screen. Tap on the button for 'New'.



How To: Start a New Inspection on the App

- The next screen is the **Choose Template** screen. This is where you select which template you will be using for the inspection.

There are three places where you can select a template from. The **Local** device, your **Cloud**, and the **Default Install**. Below is detailed information about each template location.

Local

If 'Local' is selected, then only the templates on your 'Local' machine will be displayed. A template is downloaded to your local machine anytime you start a new inspection using it from your 'Cloud' or from the 'Default Install'. You can also download templates from the 'Cloud' to the local device in 'File Manager'.

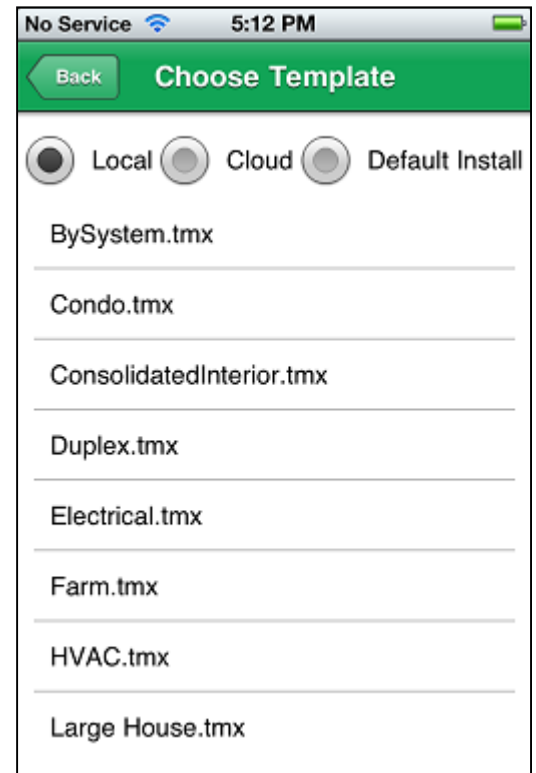
Cloud

When 'Cloud' is selected it will display all of the templates located on your cloud drive. If you select a template from the cloud drive, the program will download the template to the local machine, and then start a new inspection.

Default Install

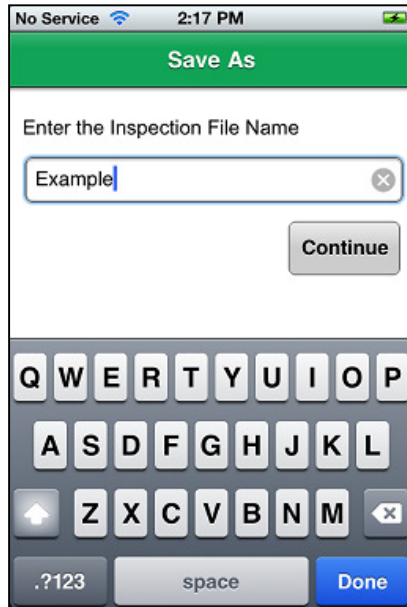
'Default Install' is a listing of all of Palm-Tech's standard templates. If you select a template from the 'Default Install', the program will download the template to the local machine, and then start a new inspection.

- Tap on the template you want to use to start an inspection with. If you want to select a template from either your Cloud Drive or the Default Install, select that section first at the top of the screen and then select the desired template from the list.



How To: Start a New Inspection on the App

- Next is the **Save As** screen. Enter the name of the new inspection and tap 'Continue' to move to the next screen.



NOTE:

- The file name must be at least 3 characters long.
 - A message will appear in **red text** if a file already exists with the same name. You will have the option to overwrite the existing file, or rename the new file a different name.
- You are now ready to begin inspecting. Select a category from the Choose Category screen to start inserting data.

