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InspectTech Software

InspectTech Software, Bentley’s newly acquired program, coordinates all of the inspection and management needs for asset owners. Previously, InspectTech software focused mainly on bridge management, with several avid users across the globe. Now, InspectTech joins forces with Bentley’s ProjectWise and MicroStation, the final piece to the ultimate structure management, inspection, and maintenance software system.

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 is the godfather of all modules. Users can control permissions, alerts, manual uploads, logos, user accounts, assets, permission levels to other modules, report frequency, filters, and profile properties.

**InspectTech Software’s Users**
We created InspectTech software primarily for agencies and State DOTs involved with bridge 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

InspectTech Systems, Inc. was founded in 2001 by two college graduate students with an idea. The idea sprouted from visiting a local county’s department of transportation agency. The students noticed the tremendous need for organization of maintenance orders and inspection reports. They brainstormed an idea for software, spoke with experts in the field, and developed the grandfather of what is now known as InspectTech Software.

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.

Where to Find InspectTech Software

Bentley’s InspectTech Software original development and implementation team is located in Pittsburgh, Pennsylvania. The software itself is accessible via the Web.
What to Look For in Version 7.0

InspectTech Software underwent extensive changes from version 6.1 to version 7.0. All changes point to a cleaner user interface.

Dashboards

Dashboards serve as a bulletin board for each module’s users. Widgets are posted onto the dashboard, alerting the user of new information and statistics upon login. For a thorough tour of the dashboards, please see page ___ of the Reference Guide.

Report Filter

The new report filter replaces the previous “index page”. Reports are filtered by their inspection process stages and listed in a table. The list includes the same edit and submission tools and presents a new “show on map” tool.

Maintenance Filter

Using a similar format to the report filter, the maintenance filter lists every maintenance item recorded in the system. The maintenance items are filtered by their status (on hold, open, complete) and can be edited, resolved, or shown on a map.

Requirements for InspectTech 7.0

- Screen resolution of at least 1024 x 768 (1280 x 960 is preferred).
- A computer system with at least a 1 GHz processor with 1 GB of RAM for optimal performance.
- Internet Explorer 7.0 or higher.
- Adobe Acrobat Reader 7.0 or higher.
- For the Laptop version, you will need 10 Gigabytes of free disk space. Additional space may be necessary, depending on the number of inspections and amount of pictures.
## Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset</td>
<td>An asset is a bridge, culvert, tunnel, road, or other structure that requires regular inspection.</td>
</tr>
<tr>
<td></td>
<td>• Asset Code: a unique code that identifies an asset.</td>
</tr>
<tr>
<td></td>
<td>• Asset Name: combination of the structure number and the common name of the asset.</td>
</tr>
<tr>
<td></td>
<td>• Asset Type: classifies the bridge as “bridge”, “tunnel”, “culvert”, etc.</td>
</tr>
<tr>
<td>Dashboard</td>
<td>The springboard page unique to each module and home to numerous widgets and pie/bar graphs, providing helpful information concerning inventory, reports, maintenance items, etc.</td>
</tr>
<tr>
<td>Profile</td>
<td>A group of users associated with an agency or division.</td>
</tr>
<tr>
<td>Role/Group</td>
<td>A position or group possessing specific permissions and performing certain tasks.</td>
</tr>
<tr>
<td>Asset Tree</td>
<td>Organizes all assets entered into the system to assist in “drill-down” searches.</td>
</tr>
<tr>
<td>Asset View</td>
<td>Presents inspectors with an asset tree reduced to the assets to which their administrator assigns them.</td>
</tr>
<tr>
<td>Query</td>
<td>Searches the entire system specifically for report data. Any information entered into a field is searchable with a query.</td>
</tr>
<tr>
<td>Field</td>
<td>A textbox or menu within the report form.</td>
</tr>
<tr>
<td>Inspection Report</td>
<td>A form used by bridge inspectors to routinely record the status of an asset.</td>
</tr>
<tr>
<td>Central Database Values</td>
<td>The values determined by the latest inspection report values.</td>
</tr>
<tr>
<td>Maintenance Item</td>
<td>Maintenance needs that have been identified during an inspection and submitted to other levels or users for attention.</td>
</tr>
<tr>
<td>Work Order</td>
<td>Selections of maintenance items gathered into one place and assigned to a specific user or group of users.</td>
</tr>
<tr>
<td>Workflow</td>
<td>The entire inspection review process, from creation of an inspection report to the final approval of a report.</td>
</tr>
</tbody>
</table>
Basic Features

How to Log into the InspectTech Website

1. Type your software URL into the web address bar.

   Login Screen

2. Set the Remember Me checkbox to save your credentials.

3. Type your Username and Password into the appropriate boxes

4. Click Login.

   Note: Contact your system administrator if you need to have a password reset.
How to Navigate Back to the Main Dashboard

You can access the main dashboard via three methods.

1. Select **Main > Main Dashboard**.

![Main Dashboard Menu](image1)

2. Select **Main > Main Page**.

![Main Page Menu](image2)

3. From an open inspection report, click the **home** icon located in the report toolbar.

![Home Icon](image3)
How to Change Your Password

1. Select **Main > Change Password**.

   ![Main > Change Password](image)

2. Type the old password into the appropriate box and then type the new password and confirm it.

   ![Change Password Screen](image)

3. Select **Change Password**.

   The next time you log in, use the new password to enter the website.
Managing “My Account”

You can change your account information at any time. The My Account option offers all of your public information, including:

- Name,
- Address,
- Email address,
- Phone numbers,
- Organization,
- Position,
- Years of experience, and
- Account expiration date.

1. Select Main > My Account.

2. Enter the desired information.
   - Make sure the Account Expiration Date: Never checkbox is set.

3. Click Save.

My Account Screen

![My Account Screen](image)

4. To add a certificate to your account:
   - Remain on this page and scroll down a little further.
   - Click the Add New button.
Managing “My Preferences”

The My Preferences option gives you the authority over numerous settings, from the default home page upon login to the files loaded on an asset detail page.

1. Select Main > My Preferences.

2. Click Edit to change your preferences.

3. Click Save.

4. Log out and log back in to view changes.
How to Add Widgets to the Dashboard

Users can rearrange and customize their dashboard to show the information they want.

1. Click the **Add Widget** button.

2. Click the **On** half of the on/off button next to the widgets you want to add.

3. Click **OK** to add the selected widget.
   - Your new widget will appear on the dashboard.

4. To expand widgets, click the **magnifying glass** in the top right corner.

5. To remove widgets from the dashboard:
   - Click the little **x** in the top right corner of the widget.
   - Click **OK** in the following prompt to remove the widget.
How to Check Your Messages

1. Click the message title in the My Messages widget to read the message.

2. For more detailed messaging tools, select Main > Messages.
How to Use the Quick Select

The **Quick Select** box is designed to find any asset in the software without requiring you to filter or drill down.

1. Type a portion of the asset's name.

   
   **Quick Select List**

   ![Quick Select List](image)

2. To navigate the menu:
   - Place the mouse in the textbox and scroll, or
   - Use the arrows on the keyboard.

3. When the asset is located:
   - Click on the asset in the list, or
   - Press the enter key to open the asset detail page.
Asset Group Filter

View and locate any/all assets within a specific parent asset.

1. Select the menu button to the right of the Quick Select.

2. Click the plus sign next to the parent asset to expand the list of children assets.

3. Navigate through the list to locate the desired asset.

4. Select the asset to view its detail page.
How to Logout Securely

The logout link is located under the Main tab.

Logout

Note: The software does not have an auto logout feature. You must manually logout of the system. This is a security precaution and should be performed when not actively using the software.
Collector Module

How to Navigate to the Collector Module

Select Collector > Collector Dashboard.

Collector Dashboard
How to Create a Report Filter


2. Click the Manage button at the top right of the page.

3. Select New from the list menu.

The following dialog box will contain tools for assembling a new report filter.
4. Type a name for your new report filter.

5. Click the plus sign next to **Click to add a new criteria**.

6. Select one of the following choices from the first menu.

7. Select one of the following parameters from the second menu.

8. Enter criteria into the textbox.

9. Click **Add**.
10. Repeat steps 5-9 to add more criteria to the filter.

11. To configure how you view the results:
   - Select a column name from the list titled **Display Fields**.
   - Click the right arrow to add.

12. Click **Save**.
How to Load a Saved Report Filter


2. Click the Saved Filters button in the top left corner.

3. Select the filter from the list.
How to Create a New Inspection Report

1. Locate an asset’s detail page via the Quick Select or the Asset Group Filter.

2. Click the Create Report button on the right side of the screen.

3. Select the radio button for the report settings.

4. Select the report type from the list.

5. Click Create.

6. Fill in the applicable fields in the following report form.

7. Exit the report to save the form.
**How to Merge Reports**

Report merging enables multiple users to simultaneously collect data on the same bridge via a laptop. Once the reports have been synchronized to the server, you can merge the reports to create a single inspection report.

1. Select **Collector > Merge Reports** page:
   
   A list of assets containing reports for merging will appear on the **Report Merging** page.

2. Select an asset from the list of assets containing reports available to merge.
   
   The asset’s report detail page will open.

3. Click the **Merge Reports** button.

   **Report Merging Page**
**Inspection Schedule**

Develop a calendar around the inspection cycle and break down specific inspections, deadlines, and other tasks.

1. Select **Collector > Inspection Schedule**.

2. To switch between day, week, month, or timeline, use the respective buttons at the top left of the calendar.
Add a Calendar Event

1. Double-click inside the calendar on the desired date and time.

2. Type a subject and description. Set the checkbox labeled All day if the event lasts a full workday.

3. Select an asset from the filter at the bottom of the window. Set a filter to shorten the list.

4. Click the Save button.
Maintenance Module

How to Navigate to the Maintenance Module

Select Maintenance > Maintenance Dashboard.

Maintenance Dashboard
How to Create a Maintenance Filter

Functions similarly to the report filter in the Collector module.

1. Select **Maintenance > Maintenance Filter**.

2. Click the **Manage** button at the top right of the page.

   *Manage Button*

3. Select **New** from the list menu.

   The following dialog box will contain tools for assembling a new maintenance filter.
4. Type a name for your new maintenance filter.

5. Click the plus sign next to **Click to add a new criteria**.

6. Select one of the following choices from the first menu.

7. Select one of the following parameters from the second menu.

8. Enter criteria into the textbox.

9. Click **Add**.
10. Repeat steps 5-9 to add more criteria to the filter.

11. To configure how you view the results:
   - Select a column name from the list titled **Display Fields**.
   - Click the right arrow to add.

12. Click **Save**.
How to Load a Saved Maintenance Filter

1. Select **Maintenance > Maintenance Filter**.

2. Click the **Saved Filters** button in the top left corner.

3. Select the filter from the list.
**How to Create a New Maintenance Item**

1. Select **Maintenance > Create Maintenance**.

2. Filter through the list of assets to locate the asset with the maintenance need.

3. Select the asset in the list to view the asset’s maintenance details.

4. Click **Manage FRA Defects** to add a new FRA Defect item. Click **Manage Maintenance Item** to add a new maintenance work item.

   You will be transferred to the maintenance item report section.

5. Click the plus sign in the top left corner.

6. Fill in the applicable fields in the following report form.

7. Exit the report to save the form.
How to Create Work Orders

1. Select **Maintenance > Create Work Order**.

2. Enter a subject and description for your work order in the first two textboxes.

3. Select a task definition in the menu.

4. Click **Save**.
   - The software will direct you to the work order dashboard.

5. Click **Add/Remove Items** on the right side.

6. Filter through the assets via the asset tree or by entering search criteria.

7. Select the items you wish to search.

8. Click **View Results**.

9. Scroll down to view the results.

10. Select the items you wish to add to the work order.

11. Click **Save Selections**.

12. Click **Close**.

   The items you selected will be listed on the work order dashboard.
How to Assign Work Orders

You can assign work orders to either yourself or to another user.

1. Select **Maintenance > Work Orders**.

2. Locate the toolbar under the **Work Flow** heading.

3. To assign the work order to yourself, click the **Assign to Me** icon.

4. To assign the work order to another user, click the **Assign to Other User** icon.

5. Select the user from the list and enter a description.

6. Click **Assign**.
How to Submit Work Orders

1. Select Maintenance > Work Orders.

2. Click the Submit icon.

   ![Submit Icon]

3. Select the next workflow stage.

   ![Workflow Stage]

4. Assign the work order to another user or to yourself.

5. Add comments if necessary.

   ![Assign Work Order]

6. Click Assign.

   ![Assigned Work Order]
Manager Module

How to Navigate to the Manager Module

Select Manager > Manager Dashboard.

Manager Dashboard
How to Use the GIS Map

The interactive GIS mapping feature locates any asset in the entire system with just the click of a button. Bentley currently uses the typical 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. Choose a perimeter from the list labeled by. Type additional criteria into the textbox to narrow the search results.

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

Note: Entering criteria into the GIS is not a necessary step.
The GIS map groups some assets together into relative areas/zones with blue and yellow circles.

5. Click on a blue or yellow circle to zoom into that cluster of assets.
6. Click the desired asset pin to generate a summarized asset detail page.

7. Click the **Street View** tab to view the asset in Google Maps street view.

8. View the full version of the asset details by clicking the **Bridge Detail Page** hyperlink.

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

10. Print the map via the **Print** hyperlink.

   **Note:** If an asset coordinate is incorrect in the map, drag and drop the pin to the correct spot.
How to Add New Field Groups

1. Select Manager > Field Organizer.

2. Click the Add New button in the Choose a Field Group section.

3. Type a name for your new field group.

4. Select the field group’s access level.

5. Click Save.
How to Edit Field Groups

1. Select Manager > Field Organizer.

2. Select an existing field group from the Choose a Field Group section.

3. Set or clear the radio buttons to edit the field group access settings in the Group Details section.

4. Add and remove specific fields in the Fields that are part of this Field Group section and the Fields NOT part of this Field Group section.
How to Run a Management Report

Management reports automatically pull queried information and place it in a predesigned report.

1. Select Manager > System Reports.

2. Filter the results by Parent Asset.
   - Click the textbox labeled Parent Asset.
   - Select the desired parent asset.

3. Select the Output Type.
   - Select HTML, PDF, or Spreadsheet from the menu.
   - The default output type is PDF.

4. Click Run Report next to the desired system report.

System Reports Screen
How to Construct a Basic Query Report

The report query:

- Designs specific queries for your needs.
- Creates a generic query that can be run for all users.
- Quickly searches for information using any inspection or inventory field.
- Provides a platform for you to perform summary reporting.

1. Select Manager > Query > Report Query.

   Report Query Screen

2. Select the Click to add new criteria link.

3. Use the tree search to locate the field for the query.

4. Click Search for a Field to type the name of the field into a search bar.

   Query Tree Search
5. Enter the parameters for the filter. In the menu, select either:
   - <,  
   - <=,  
   - >,  
   - >=,  
   - =,  
   - contains, or  
   - does not contain.

The first five parameters are used for numeric data. Contain and does not contain are primarily used on text fields.

6. Enter the value parameter.
   - Click the search icon (🔍) to the right for help in choosing what values may be entered for the field selected.

Enter Query Values

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

The query will generate the results and place them at the bottom of the page. You have the following options:
   - Directly edit the results in the generated table.
   - View the returned assets on a map, just like the GIS Map demonstrated earlier.
   - Export the results directly to Excel, KML, or to CSV.

Query Results Screen

The query results are delivered in a table. You can:
   - Scroll through the results
   - Open any detail page by selecting the link
   - Sort the data by selecting one of the column headers.

6. To Save the query, see the corresponding section of the manual, How to Save a Query.
How to Construct a Multiple Criteria Report Query

1. Navigate to the Report Query page.

2. Select the Click to add new criteria link.

3. Use the tree search to locate the field for the query.

4. Click Search for a Field to type the name of the field into a search bar.

5. Enter the first parameter.

6. Click the Click to add new criteria link to add more criteria to the query.
   - Repeat as many times as necessary.

Multiple Criteria Report Query

The results will generate at the bottom of the page.
How to Delete Criteria from a Query

1. Click the arrow next to the criteria.

2. Select **Delete**.

*Delete Criteria Screen*
Adding Additional Filters to the Report Query

1. Navigate to the Report Query page.

2. To add a filter to the report query:
   - Scroll down the left-hand side of the page.
   - Click the Additional Filters tab.

3. Three filters can be applied to a query:
   - **Values Returned**: Returns the assets with their central database values (the most recent values) or their 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 central database values with that additional checkbox selected.
   - **Records displayed on each result page**: 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.

Additional Filters Screen
Select Display Columns for the Report Query

For more organized and custom query results, you can choose columns to add to the generated report. The default amount of columns depends on the criteria you enter into the report. You can add as many columns as necessary.

Note: The fields used as part of the query are automatically added as displayed columns.

1. Navigate to the Report Query page.

2. To edit or include additional fields in a query report:
   - Click the Select Display Columns tab on the left side of the main query page.

   This will generate a new page called Available Report Fields.

3. Locate the desired fields via the tree search.

4. Include the field by setting the checkbox next to it.

5. Click on the small black arrow in between the two sections to transfer the fields to the displayed column in the report generated.

On the right side of the page is a section called Displayed Columns. These fields are predefined or have already been added as columns of the generated query report. You can:
   - Rearrange these fields by clicking the Up/Down buttons.
   - Change the display of the field to either Show Value or Show Comment.
   - Remove the field from the report by clicking the Delete button.

Select Display Columns Tab
How to Save a Query

Save your query to eliminate the repetition of setting up a new query.

1. Jumpstart to **Save Query**:
   - Enter the query criteria using the tree search and parameter textboxes provided.
   - Use any additional filters if necessary.
   - Select display columns to desired fields.

2. Click the **Save Query** tab along the left side of the page.

   *Save Query Screen*

3. Give the query a title.
   - Optional: Add a category from the menu or create a unique category name.
   - Optional: Enter a description of the query.

4. To save a query which has been uploaded and edited:
   - Click the **Save Query** tab.
   - Save it as a new query or just save the changes made to the existing query.
How to Load a Saved Query

1. Navigate to the Report Query page.

2. Click the Load Existing Query tab on the left-hand side of the page.

3. Filter the list of queries by selecting options from the menu.
   - **User**: Select the user to view their queries. You are the default selection.
     - To see all queries from all users, select **All Users**.
   - **Category**: Select which category of queries to view. The default setting is **All Categories**.

Load Existing Query Screen

4. To save a changed query:
   - Click the Save Query tab on the left-hand side.
   - Click **Save Query Changes** next to the query title.
How to Edit Query Results

1. Jumpstart to **Edit Results**:
   - Enter the query criteria using the tree search and parameter textboxes provided.
   - Use any additional filters if necessary.
   - Select display columns to desired fields.
   - Click **Run Query**.
   - Scroll down to the query results.

2. Click **Edit Results** in the top left-hand corner of the results section.

   *Edit Results Button*

3. Click inside one of the textboxes.

4. Select a value from the drop down or type in a new value. Suppose you need to change the ADT for an asset from 3,228 to 5,000.

5. Click **Done Editing**.
How to “Bulk Edit” Query Results

The bulk edit feature will change all fields to the new value.

1. Run the query.

2. Scroll down to the query results.

3. Locate the bulk edit feature.
   - Select a value from the dropdown.
   - Click inside the textbox next to it and type the change.

4. Click the Bulk Edit button and verify the action.

Basic Bulk Edit
How to Show Results on a Map

1. Run the query.

2. Scroll down to the query results

3. Click the **Show Assets on Map** button.

   In a new Internet tab, the GIS map will plot all of the assets returned from the query.

4. Zoom in and out of the map to view where all the returned assets are located. The Street View option is also available.
How to Export Results to Excel

1. Run the query.

2. Scroll down to the query results.

3. Click the Export Results to Excel button.

   The Excel file will automatically generate with all the assets pulled from the query.

4. Save the Excel file and arrange/format the data in a variety of ways.

   Export Results to Excel
How to Export Results to KML

By exporting results to KML, you can view the results in Google Earth. You must have Google Earth (or another similar mapping system) installed on your computer.

1. Run the query and scroll to the query results.

2. Click the Export Results to KML. This will automatically launch Google Earth. You can zoom in and out to see a 3D projection of each bridge.

Export Results to KML
How to Export Results to CSV

1. Run the query and scroll down to the query results.

2. Click the Export Results to CSV button.
How to Build a Picture Query

Search through every photo stored in the software by date, category, and the file description. You can save the query and upload it again for future use.

1. Select Manager > Query > Picture Search.

2. Create filters to narrow the query results.
   - Select the dates to filter the pictures.
   - Enter a file description.
   - Select a photo category (i.e. General View).
   - Enter the file name.

3. Click Run Query.

   Note: You may also access the asset details page by selecting the link from the results.
How to Add a New User

1. Select Administration > Users and Groups > Manage Users.

2. Click the Create New User option from the list on the left.

3. Type in the new user’s information.

4. Assign the new user to a new password and a group, or another user’s permissions.
   - Group:
     o Select the Group from the list of choices.
   - Another User’s Permissions:
     o Set the checkbox next to Copy asset permissions from another user.
     o Select an existing user to share permissions with the new user.
   - Password:
     o This is a temporary password.
     o The new user must change their password immediately after their initial login.
     o You can set an expiration date for the new user’s assigned password.

5. Click Save to finish.

6. Select and enter additional information, such as the account expiration date, email address, address, and phone numbers.
How to Edit or Delete a User’s Account

1. Select Administration > Users and Groups > Manage Users.

2. Select the user from the list on the left side of the page.

3. Update a user’s information and click Save.

4. To delete the user:
   - Click the Delete button.
   - Click the OK button for verification.

   Edit/Delete User
Users List

The Users List provides contact information such as email, phone number, addresses, and other important information. The Users Lists also offers mass emailing options.

1. Select **Administration > Users and Groups > Users List**.

2. Filter the list to find a user more easily:
   - **Member of**: Select users by the county.
   - **Groups**: Select users by their permission levels.
     Or:
   - Enter information in both menus.
   - Click **Filter**.

*Users List*
How to Create a New Group

1. Select Administration > Users and Groups > Create and Edit Groups.

2. Select Create New Group from the list on the left.

3. Type the new group name and description.

4. Set or clear the checkbox This group is enabled.

5. Grant the group authority to all, some, or one of the InspectTech modules via the checkboxes.

6. Click Save.
How to Manage Groups

1. Select Administration > Users and Groups > Create and Edit Groups.

2. Select the group from the list on the left.

3. Change or add the appropriate information to the group settings.

4. Click Save to save changes.

5. Select Delete to remove the group from the system.

Manage Groups Screen
Manage Workflow User Assignment
How to View User-Asset Security

To view the security settings for a particular asset, qualified users can perform any of the following tasks:

- **Asset Security for One User and One Asset**: Filter down to any specific asset and select a person/group from the system to see their security settings.
- **All Asset Security for a Single User**: Select a person from the list to see all of their permissions.
- **All Security for a Single Asset**: View all users’ access and permissions to an asset.

1. Select **Administration > Users and Groups > View User Asset Security**.

   **Basic View User Asset Security Screen**

   **Asset Security for One User and One Asset**:

   1. Select a user from the list box.

   2. Use the tree search to locate the asset.

   3. Click **Show Results** to generate a report containing the security information. View the results just below the search area.

   4. Click the **Edit** hyperlink to edit the security settings.

   **Basic Edit Asset Security Screen**

   **All Asset Security for a Single User**:

   1. Select a user from the list box, but *do not* select an asset from the tree search.

   2. Click **Show Results**. The software will return all asset permissions for that single user.

   **All Security for a Single Asset**:

   1. Select **All Users** from the list box.

   2. Use the tree search to find a specific asset. The results will show all security for that asset by each user.

   3. Edit the information if necessary.
How to Manage Group Task Security

1. Select **Administration > Users and Groups > Manage Group Task Security**.

2. Use the list box to select a group.

3. Set the checkboxes next to each task to grant permission. Clear them to prohibit.

   *Set Task Security Example*

4. Click **Save**.

   *Note: Understand that tasks are managed on a group by group basis, not by user.*
How to Manage Fields

You can:

- Add an additional 500 words to a field’s maximum length,
- Change the description to better correlate with the field name, or
- Add more choices to the menus on the form.

1. Select **Administration > Forms and Fields > Manage Fields**.

2. Locate the field using the tree search and filter.

3. Select the field. Its information will appear in the area to the right.

4. Make any changes necessary to the field.

5. Click **Save**.
**Forms Security**

1. Select **Administration > Security > Forms Security**.

2. Use the tree search on the left to locate the form.

3. Double-click to open the form’s details page.

   *Forms Security Page*

4. Select the group and the access level for the particular form from the menu.

5. Click **Save**.
How to Create a New Asset

1. Select Administration > Asset Security > Manage Inventory.

2. Select Create New Asset under the appropriate parent asset.

3. Fill in the appropriate information for the newly created asset, starting with Bridge Name.

4. Click the Save button to finish.

5. Click the Save and Create More button to create more assets.
How to Edit an Existing Asset

Edit Options:

- Bridge name,
- Bridge code,
- Type of structure,
- Type of report required, and
- Status of the structure.

1. Select Administration > Asset Security > Manage Inventory.

2. Select the asset you would like to edit from the Asset Tree.

3. Enter the information necessary to edit the asset.

4. Click Save to finish or Save and Create More if another asset needs created or edited.
How to Delete an Asset

Note: There is no undo when deleting a bridge. If you accidentally delete a bridge, please contact InspectTech to restore the bridge.

1. Select Administration > Asset Security > Manage Inventory.

2. Select the asset to delete from the Asset Tree. This will display the Bridge Details in the right-hand side of the screen.

3. Click the Delete button at the bottom of the Bridge Details screen. The software will prompt you for verification.

Delete Button
How to Archive an Asset

Instead of completely eliminating the asset, you can archive all of the asset information, excluding it from reports and searches.

1. Select Administration > Asset Security > Manage Inventory.

2. Use the tree filter to search for the desired asset.

3. Select the asset. The asset’s details will display on the right side of the screen.

4. Select Archived from the list box labeled Bridge Status.

5. Click Save to finish.

   The software will remove the asset from the quick select and the tree filter.

   Archive Bridge
How to View and Apply User Permissions to an Asset

1. Select Administration > Asset Security > Manage Inventory.

2. Select the asset to view from the Asset Tree. This will display the Bridge Details in the right-hand side of the screen.

3. Scroll down the Bridge Details screen to the View and Apply User Permissions for this User section.

   View and Apply User Permissions for this User

4. In the User field, select a person from the menu.
   - The selected user’s permission level for that asset or parent will be shown in the Permissions field.
   - The Custom Security section will expand to display the user’s asset access level and report access level.

5. Select the desired Permission Level and Custom Security selections.

6. Click Save User Permissions.
**How to Set Asset Security**

Managers can limit an inspector’s access to only a handful of assets.

1. Select **Administration > Asset Security > Set Asset Security**.

2. Select any/all the individuals or groups in the **Users and Groups** section of the page.

3. Select the permission level from the **Permissions** section to apply to your chosen users/groups:
   - Administrator
   - Read Only/Review Only
   - Inspector
   - Hidden
   - Custom
     - If **Custom** is chosen from the menu, click the blue **Custom Security** tab to expand. Apply desired settings.

4. Scroll down and select the specific assets using the tree search.

5. Click **Save**.

*Set Asset Security Screen*
Create New Profile

For the brief definition of a profile, see the Glossary.

1. Select Administration > Manage Profiles.

Create Profiles Dashboard

2. To expand the blocks (parent and children profiles):
   - Click the down arrows.
   - A third level to the diagram will expand and show all of the districts, cities, or counties (profiles) associated.

Expanded Profiles

3. To create a new profile:
   - Click the green New button inside a profile block.
   - Type in the name of the new profile.
   - Optional: Select another profile to copy from the menu labeled Copy settings from profile.
   - Select the settings by clicking through the tabs or clicking Next and Previous to navigate.
   - Click Finish to save, or
   - Click Cancel.

   Note: The new profile’s position in the hierarchy depends entirely on where you select the New button.

New Profile Screen

4. To add an already existing profile:
   - Click the green Existing button inside one of the profile blocks. A pop-up will list all of the available profiles.
   - Set the checkbox next to the desired profile.
   - Click Save to add the profile, or
   - Click Close to cancel.
5. To edit a profile:
   • Click the yellow Edit button inside the block of the profile you want to edit. A pop-up similar to the New profile will generate.
   • Change any of the details desired.
   • Navigate through the edit tabs by clicking Next.
   • Click Finish when the changes are complete, or
   • Click Cancel.

6. To delete a profile:
   • Click the red Delete button in the profile block you wish to delete.
   • Verify the deletion by clicking OK in the pop-up.

Add Existing Profile Screen
How to Create Asset Views

Qualified users can limit the amount of assets displayed in an asset tree (filter function).

1. Select Administration > Manage Asset Views.

2. To begin creating a new asset view:
   - Click the Create New Asset View button.
   - Select the asset type (bridge) and name the asset view.
   - Click the Save New Asset View button.
   - Fill out the Asset View Details form.
   - Set the checkboxes next to desired assets in the asset tree.

Create New Asset View

3. To edit an asset view:
   - Click the Load/Edit hyperlink next to the desired asset view.
   - Edit the information in the Asset View Details page or set/clear the checkboxes in the asset tree.

4. To delete an asset view:
   - Click the Delete hyperlink next to the desired asset view.
   - Click OK to verify the decision.

5. Set the user and group permissions in the sections below the asset tree.
   - Click Save Group Permissions.

Asset Views
How to Manage Certificates

You can add certificates to a user’s account in a few easy steps via the Administration module.

1. Select Administration > Manage Certificates.

2. Select a user from the list on the left.

   User Account

3. Scroll to the bottom of the user’s information.

4. Click the Add New button in the Certificates section.

   Certificates

5. Fill out the certificate upload form.
   - Select the certification type from the menu labeled Certification.
   - Set whether the certificate is Active or Approved.
   - Enter the begin and end date.
   - Enter the license numbers, descriptions, or other specific information.
   - Add any comments necessary.

6. Upload the certificate file from your computer.

7. Click Upload.

8. Click Save.

   Add Certificates Form
How to Create a New Email Alert

1. Select Administration > Manage Email Alerts.

2. Click Create New Alert.

3. Fill in the information accordingly.

4. Review the To: and From: areas to ensure only certain users will receive the notification.

5. Click Save.
How to Manage Existing Email Alerts

1. Select Administration > Manage Email Alerts.

2. Click the link labeled Load/Edit. The information will generate to the right.

3. Edit information by selecting options from a menu or typing into textboxes.

4. Set the checkbox called Enable to enable the notification or clear the checkbox to disable it.

5. Click Save.
How to Upload a Logo

1. Select Administration > Manage Logos.

2. Click the Choose File button to browse your computer for the image.

3. Enter a description if necessary.

4. Click Upload.

The new logo will appear at the bottom of the page, under the logo upload tool.
How to Edit Manual Pages

The right-hand side bar contains a tab for manual pages. Manual pages serve as a quick resource directly within the report (i.e. assigning condition ratings to specific parts of a bridge).


2. Locate the field via the tree search on the left.

Manage Linked Manuals Screen

3. To add partial manuals to a field:
   4. Click on the field from the tree search.
   5. Select the Reference Item Type from the menu (PDF, Image, or Text).
   6. Type the manual pages to add.
   7. Click Add PDF.

8. To upload a new manual altogether:
   9. Click on the field from the tree search.
   10. Select the Reference Item Type from the menu (PDF, Image, or Text).
   11. Click the Upload New PDF Manual tab.
   13. Type a name for the manual.
   14. Click Browse to select a manual from a computer file.
   15. Click Update.

16. To edit existing manual pages:
   • Scroll to the bottom of the Manage Linked Manuals page to view a list of all the manuals linked to the selected field.
   • Click Edit.
   • Type new page numbers or titles, or add a description.
   • Click Update.

17. To edit whole existing manuals:
   • Click the Upload New PDF Manual tab.
   • Enter search criteria into the Name textbox to filter the results.
   • Click Edit.
   • Type a new manual name or delete the manual.
   • Click Update.
How to Run an Audit Report

Two types of audit reports account for any changes made in the software or by users’ access (login/outs).

- The **bridge and reports changes** track any changes made to the bridges and inspection reports.
- **User access** tracks each user’s access to the system.

1. Select **Administration > Audit Report**.

2. Select the type of audit report to generate from the menu:
   - **Bridge and Report Changes**
     - Enter information into the **Bridge Name Contains**, **Changed Object Contains**, or **Inspector Name** textboxes to narrow the results.
     - Select the date ranges relevant to the report.
   - **User Access**
     - Enter information into the textbox labeled **Inspector Name**.
     - Select the date range relevant to the report.

   **Note:** These categories are optional and do not need to be filled out to run the report.

3. Click the **Run Report** button. The results will generate at the bottom of the page.

   *Audit Report Screen*
Manage Report Frequency
Manage Maintenance Filter Permission
Contact Information

Bentley takes great pride in their customer support.

<table>
<thead>
<tr>
<th>Email</th>
<th><a href="mailto:help@inspecttech.com">help@inspecttech.com</a></th>
</tr>
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<tbody>
<tr>
<td>Phone</td>
<td>412.681.1521</td>
</tr>
</tbody>
</table>

Please be as descriptive as possible when sending an email for support.