



VIEWSPECTION INSPECTOR GUIDE

Step by step guide for getting the most out of ViewSpection!

Version 2.0

Contents – Significant changes have been made to the highlighted sections. Please review before completing your next ViewSpection survey.

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ViewSpection Inspector User Guide



ViewSpection's Inspector App is designed to remove the tedious, time consuming work from your field work.

ViewSpection Inspector automatically builds your report one image at a time. Each photo you take generates a professional grade report with labeled photos, narrative and auto-generated recommendations.

Use ViewSpection for exterior or interior surveys. ViewSpection works great for either residential or commercial reports.

Our latest update has added even more functionality and flexibility, allowing you to add additional buildings in the field and complete a full inspection on each additional building, including the exterior and/or interior of each.

We are insurance inspectors as well as software developers, so we built ViewSpection with inspectors in mind.

We are always looking for feedback and development ideas. Please feel free to contact our support department with any feedback or requests for services and we will be glad to help. Support - 800-576-9239 Ext 805 or 806

The ViewSpection Team

ViewSpection Quick Overview: The App

It only takes 5 minutes to a complete report:

Log In

Select Case from Quotes to Visit

Take photos as you do a 360-degree tour of the property.

Capture Defects

- Hot Button
- By Category
- Custom

Answer Special Instructions: Dictate or type in responses to any case/order special instructions.

Add Survey Comments: Add in free form narrative that is needed to describe the risk. Add in as many comments as necessary, they will be automatically compiled in one section of the final report.

Upload Now or Later: The upload takes 3+ minutes. Do it now or when you get back to your office when Wi-Fi is available.

Note: These are data extensive files, with numerous photos, so it is best to upload when you have access to Wi-Fi rather than on your cell phone data plan.

Later, we will review the power of the ViewSpection web platform which gives you options for further editing of the report.

Once the file is uploaded from the app, the report is available on the web platform and is accessible from your computer: Review your report and add any items you may need such as a diagram or replacement cost information.

Send In: Click Complete Report and send along to Quality Assurance (QA). **Your report is not automatically sent to QA until you select Complete Report on the web platform***

*Your company's workflow may be configured to bypass web work in which case the report will be immediately available to the underwriter upon upload from the app.

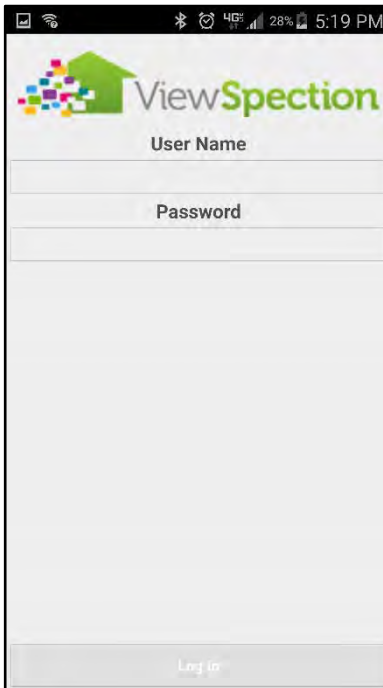
ViewSpection Inspector Guide: The App



Opening Screen

Select the ViewSpection Inspector app from the Google or iOS app store and download to your phone.

Your company will provide you with log in information to open the app.



Logging In

Log in with the information provided by your company.

You will only need to log in the first time you use the app unless you log out.



E-mail Notifications

You will receive e-mails when you have been assigned new work.

There will be automated messages sent to you during the life cycle of the survey to prompt for certain actions like scheduling the field work, entering a status update or doing any web work needed prior to sending in the completed survey.



ViewSpection Dashboard

Quotes to Visit are cases which have been assigned to you and are ready for field work.

In Progress are cases you have opened and begun work on in the ViewSpection app and have not yet been completed.

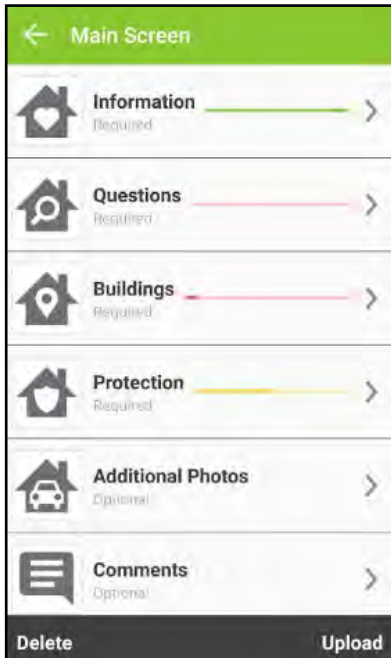
Ready to Upload are cases you have marked to upload later when you have Wi-Fi connection or more time.



Selecting Cases

When you select **Quotes to Visit** you will see a display with all the cases you have available to work.

Scroll thru and when you have identified the case to open, simply tap it.



Main Navigation Screen

This navigation screen allows you to move from one section to another with a tap of a finger. You may navigate from **Questions** to **Buildings** to **Comments** as needed based on where you are in your field visit.

Any work you were working on in any particular section will be saved automatically.

If a section is incomplete you will be prompted to finish it before uploading the file.

Reviewing and Editing Case Information

From the Main Screen you can access the **Information** screen.

From here you may review the contact and address information as well as edit any information which is incorrect. When complete, select **Update Address Information** at the bottom of the screen to update the main office's information. Likewise, if the main office has made any changes, you will be notified to select **Update Address Information** at the bottom of the screen.

Note: You can place a phone call to the contact or agent by tapping the phone icon in the information screen.

Completing Questions in the Field

Depending on the customer you are completing a survey for, there will be a number of questions in the **Questions** sections.

The **Questions** section on the **Main Screen** will ask the date of survey, person interviewed and the type of interview.

The questions on the following screens are found in the **Questions** section on each building screen, and represent typical questions which you might see while completing a property survey.

Questions

Number of Stories

☒ 1

☐ 1.5

☒ 2

☐ 2.5

☐ 3

☐ 3.5

Foundation

☐ Slab

☐ Crawl

☒ Basement

Occupied By

☒ By Owner

☐ By Tenant

☐ Multi-Family

Help Next

More Questions

Every effort has been made to utilize check box questions to speed your entry in the field.

Most questions will allow for selecting multiple answers. For example, if the property you are viewing has multiple story types, select the appropriate stories on the screen.

Questions

☒ Basement

Occupied By

☒ By Owner

☐ By Tenant

☐ Multi-Family

☐ Vacant

☐ Seasonal

☐ Student

☐ Other

House for Sale

Yes No

Biz on Premise

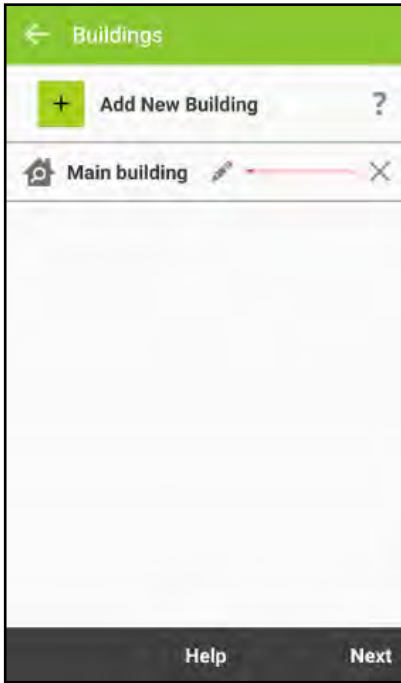
Yes No

Help Next

The last of the questions

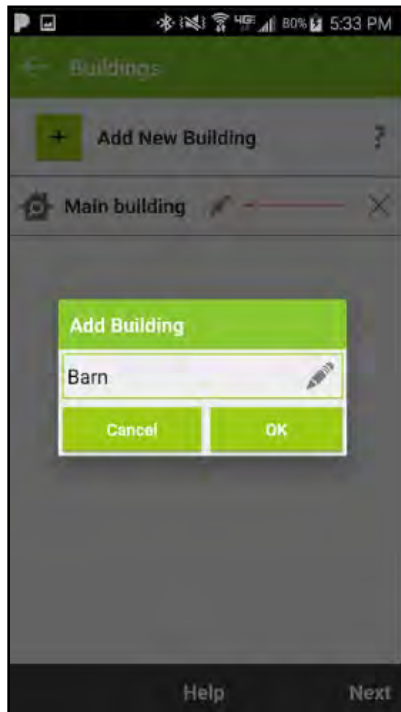
Here are some additional typical questions. Your actual survey questions will vary.

Select **Next** at the bottom of the screen (or top right on the iphone app) to continue or use the Back arrow at top of the screen to return to the Main Screen.



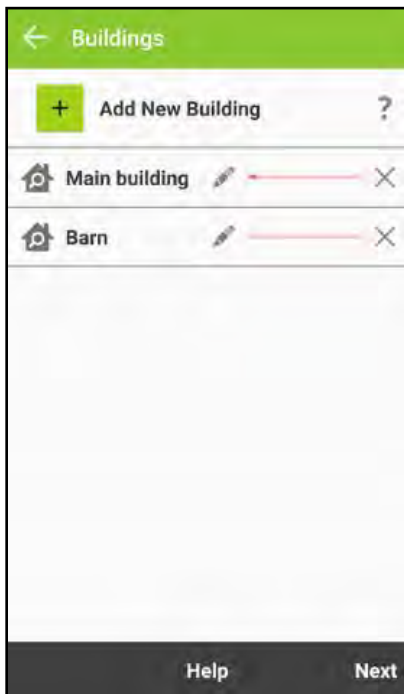
Buildings

The **Buildings** screen is pre-labeled with the **Main building**, and you can add buildings as you go by tapping the **Add New Building** icon **+**. This replaces the Outbuilding section from the previous version of the Inspector app.



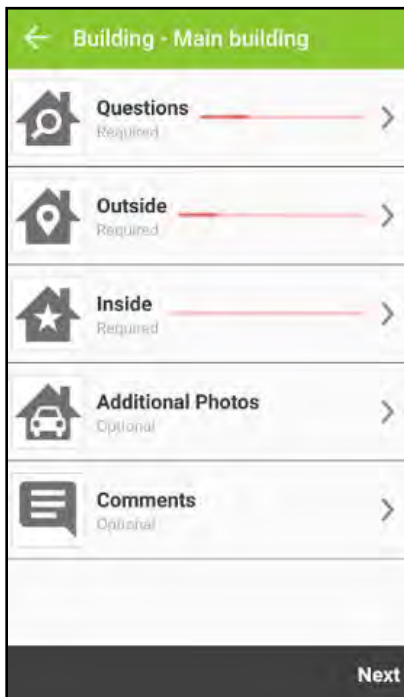
Add New Building

When adding a new building, Label it accordingly and tap **OK**.



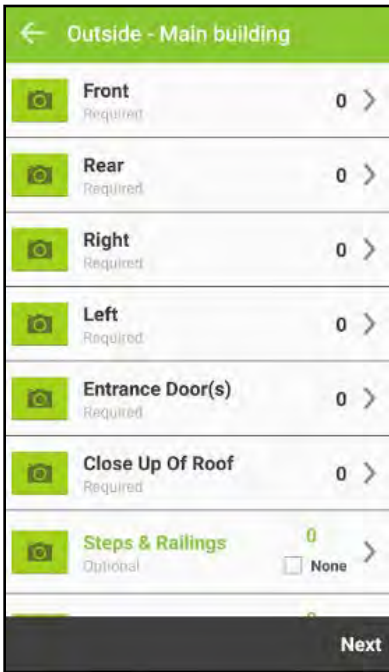
New Building Label

Add and label as many buildings as necessary.




Building Screen

Each building screen will allow you to navigate to the specific areas of the building for your survey.



The Exterior Screen


This will be your main screen when completing an the Outside. To access all of the sections you can scroll up and down.

To access a section, tap the camera  icon.

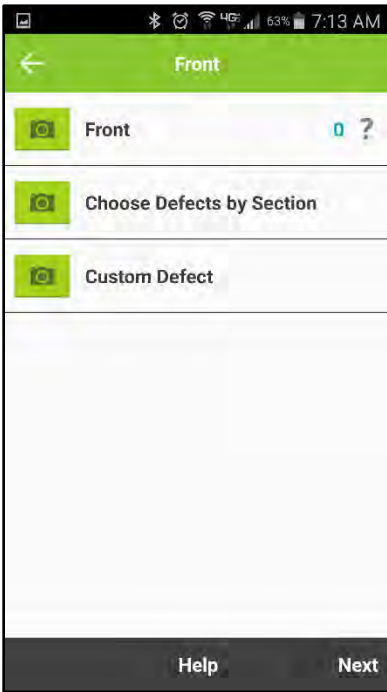
Each section is set to take you directly to the camera function or to open the second screen to respond to questions AND take a photo.



Camera Screen

Once you have selected  to take a photo, your standard camera screen will appear and functions normally.

Once you take the photo, you will be prompted to save the image by clicking **OK**, or to re-take it, **RETRY** (“Retake” or “Use Photo” on an iphone)



Front Section: The Secondary Screen

Each section will have a secondary screen which guides you with additional questions and defects to capture. To access the second screen, tap in the middle of the bar (the white space to the right of the title, ie. “Front”).

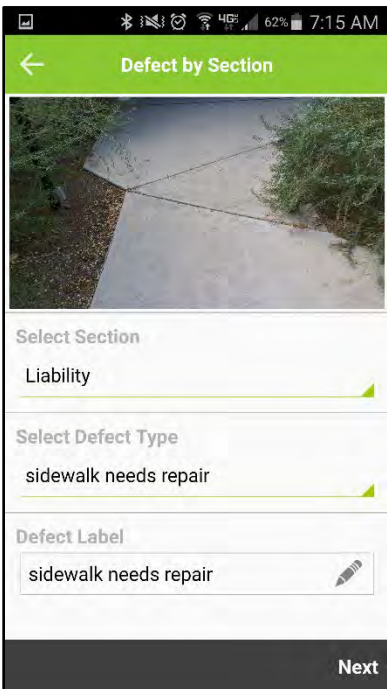
The **Front** screen is a good example of a screen with no questions other than taking photos and capturing defects.



By selecting the **Front** , you will take a photo of the front of the property.

By selecting either of the **Defect** camera icons, you will be prompted to capture a defect you have observed.

Note: The intention here is that while standing in front of the property, you are most likely to see possible defects. This function allows you to capture the defect while you are also getting your **Front** photo.



Creating a Defect by Section

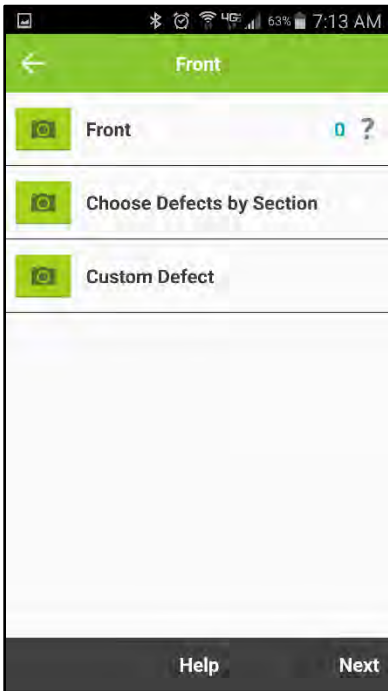
Tap the **Choose Defects by Section** camera icon (see prior screen shot) and you will be prompted to first take a photo of the defect.

After taking the photo and accepting the image, go to **Select Section** and choose an appropriate section for the defect. In this case, **Liability** was selected as it best relates to a sidewalk defect.

Next, choose **Select Defect Type** and choose the most accurate defect description.

Once you have selected the defect, the Defect Label is displayed at the bottom. You may customize the defect label if desired.

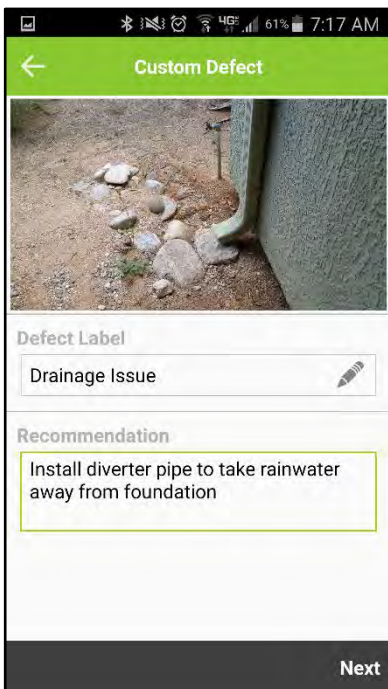
Select Next to continue.



Creating a Custom Defect

When you cannot find an appropriate defect in the Defects by Section, use the Custom Defects option.

Tap the Custom Defect camera icon and you will be prompted to first take a photo of the defect.



Creating a Custom Defect

After you have captured the image, type in a custom **Defect Label**, this is the label that will appear with the defect image in the final report.

Next, type in or dictate a custom recommendation which will correct the defect.

Select **Next** to continue.

Roof

Roof

Defects

- ☐ curling shingles
- ☐ moss on roof
- ☐ lifting shingles
- ☐ roof exceeded life expectancy
- ☐ roof drain clogged
- ☐ rusted metal roof
- ☐ flat roof ponding
- ☐ flat roof needs recoating
- ☐ wavy roof or shingles

Choose Defects by Section

Custom Defect

Next

Creating a “Hot Button” Defect

Hot Button defects are those 20% of defects which seem to cause 80% of the losses. These hot button defects are built-in to many sections like this one for **Roofs**.

When you see these check box defects, just tap the appropriate defect such as “lifting shingles” and you will be prompted to take a photo of the defect.

Once you save the image, the recommendation is automatically created.

Outside

Steps & Railings
Optional ☒ None

Deck
Optional ☒ None

Driveway & Sidewalk
Optional 2 ☐ None

Yard
Optional 1 ☐ None

Trampoline
Required ☒ None

Pool
Required ☒ None

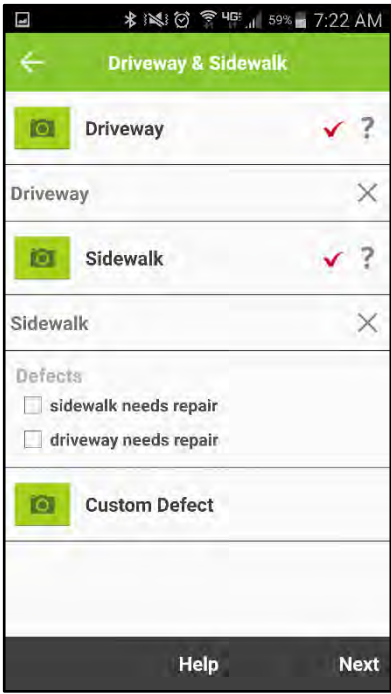
Hot Tub
Required ☒ None

Next

Required and Optional Questions

Many properties will not have some of the listed items such as Steps, a Trampoline or a Hot Tub.

In these cases, mark the **None** box and the form will reflect that item was not present.

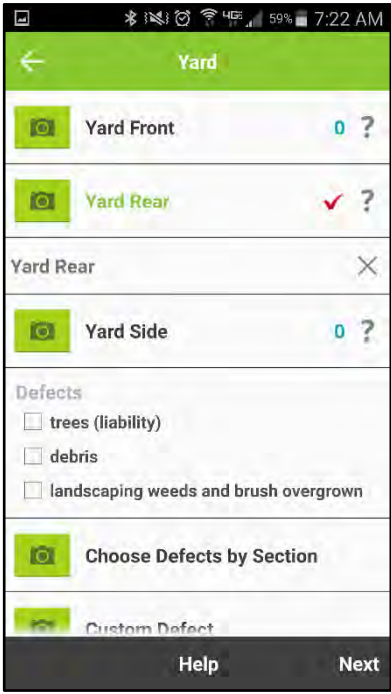


Managing Photos

As each photo is taken, it will be represented by a red check mark and below that, a label of the photo (Driveway) with an “X”.

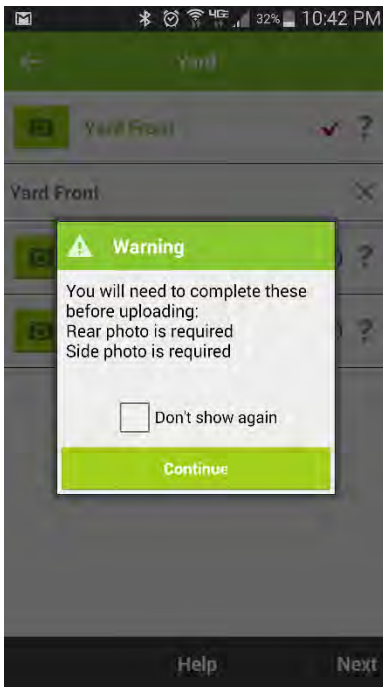
You can delete any photo by clicking the “X”.

You will then be required to replace the photo if it is a mandatory image.



No Photos Taken

If there is a zero to the right of the Question, no photo has yet been taken.



Warning Prompts

There are built in warnings to remind you when a section is not complete, a photo is missing or a mandatory question needs a response.

You can click “Don’t show again” to turn off the warnings. However, they are pretty handy and give good guidance, so we recommend you leave warnings turned on.



Completing a Section

On the Main Screen there are status bars which give you a visual approximation of your progress.


Here you can see that the Outside section is a full green bar and is complete.

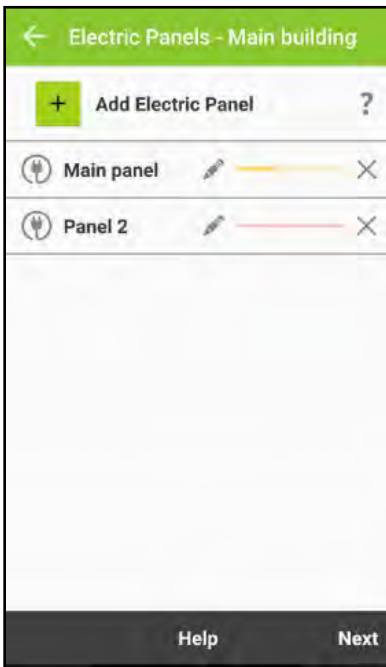
Completing an Interior Survey

ViewSpection gives you the ability to complete an exterior survey or an interior survey.

To skip the interior survey, click “No inside survey was completed” at the top of the screen. This box will already be checked for an Exterior only survey

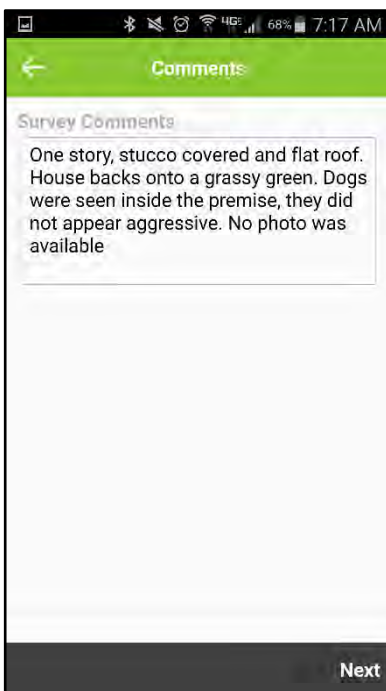
Multiple Utilities

The main utility is prelabeled, and you can add additional utilities as you go, by clicking the **Add** button .



Additional Utility Label

Just like adding additional buildings, you can add and label as many additional utilities as needed.



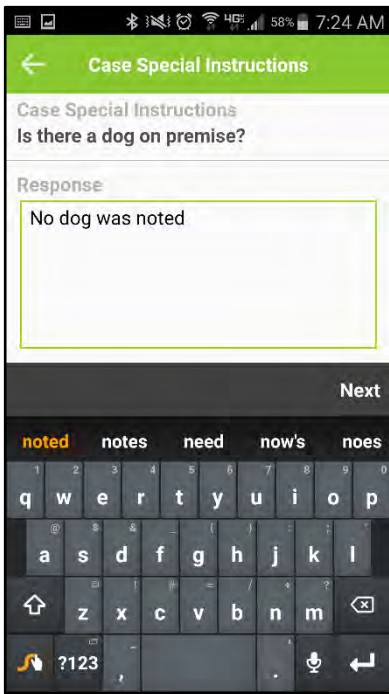
Adding Narrative

Access **Comments** at the bottom of the Main screen. Comments can also be added to individual buildings if necessary.

Narrative may be added to the report by typing or using your voice-to-text button on your keyboard.

You may put in multiple comments while completing your survey. The comments will be added into the Comments section in the order they were made.

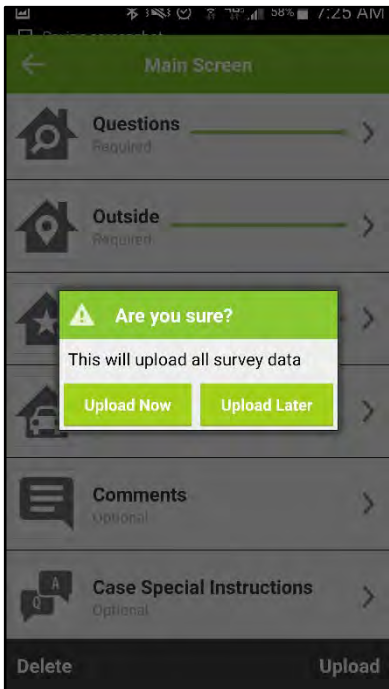
You may edit them further on your computer after uploading.



Case Special Instructions

Access **Case Special Instructions** at the bottom of the Main Screen.

This is a mandatory field if there were special instructions provided. Click on the **Case Special Instructions** button and you will be prompted to respond to the question in a text based reply.



Uploading the ViewSpection

Once you have completed all required sections and questions, select **Upload** at the bottom of the **Main Screen** and choose, **Upload Now** or **Upload Later**.

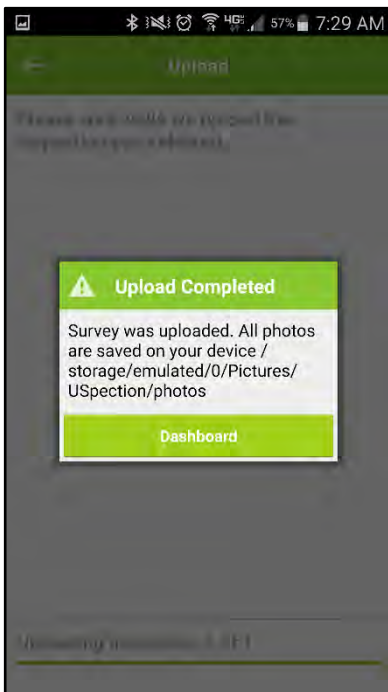
The upload will take 3+ minutes and will use data on your phone.

If you would like to save time or upload later when you have access to Wi-Fi, choose **Upload Later**.



Upload Progress

You can monitor the upload progress of the file at the bottom of the screen.



ViewSpecion Field Complete

Upload Completed - The survey has been uploaded and is accessible on the ViewSpecion web platform by logging in from your computer.

From the web platform you will be able to review and edit the report prior to sending to quality assurance or direct to the carrier.

If you do not complete the web work in a few days, you will receive an e-mail reminder.

ViewSpection Quick Guide: The Web Platform

The App can provide 100% of the content you need to complete a full loss control report. You will only need to access the Web Platform to send in the report to Quality Assurance (QA).

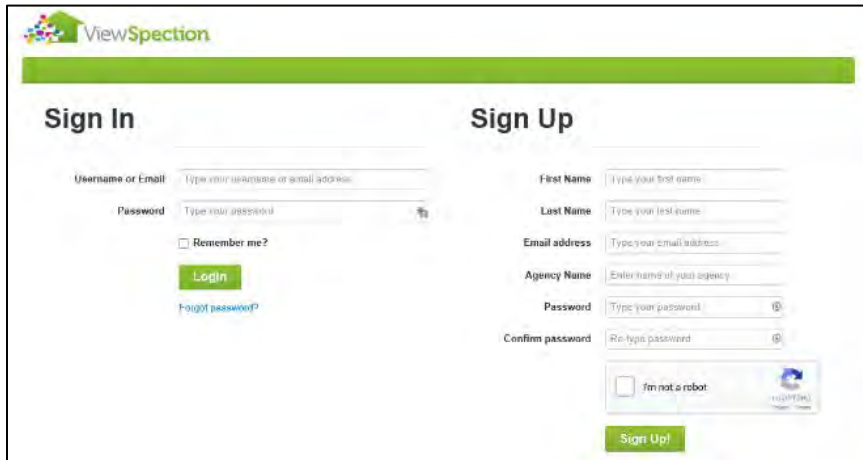
The Web Platform also allows full editing, defect creation and narrative/summary comments generation. For some people, utilizing the Web Platform is a more comfortable and efficient manner to develop and build a report.

Special Note: In ViewSpection, defects are very image centric. To generate defects and recommendations in the Web Platform, you will have needed to capture a specific photo of the defect or be able to crop it from a general photo from another section. You cannot generate a recommendation without a photo.

Let's walk through the steps from Viewing to Completing your ViewSpection report in the Web Platform.

Web Site Log In

To Log In: <http://app.viewspecion.com/Account/SignIn>



The image shows the ViewSpecion login and registration interface. It features two main sections: 'Sign In' and 'Sign Up'. The 'Sign In' section has fields for 'Username or Email' and 'Password', with a 'Remember me?' checkbox and a 'Login' button. Below the 'Login' button is a link for 'Forgot password?'. The 'Sign Up' section has fields for 'First Name', 'Last Name', 'Email address', 'Agency Name', 'Password', and 'Confirm password', along with a 'Sign Up!' button. A reCAPTCHA widget is located at the bottom of the 'Sign Up' section.

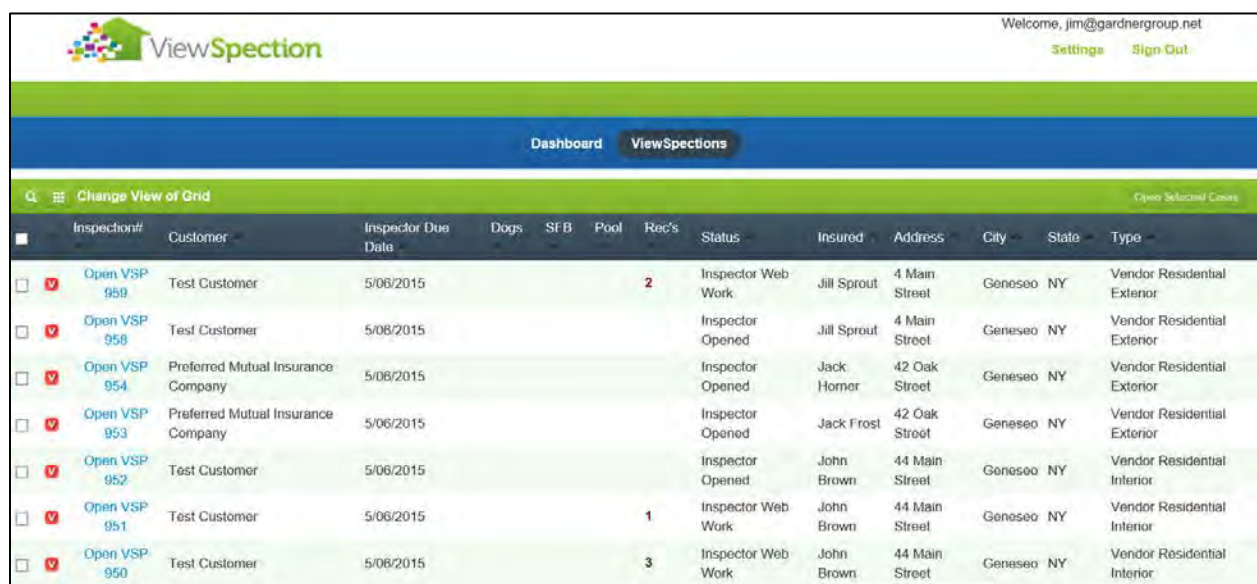
The web platform uses the same log in information that your app does.



Dashboard

The dashboard has some handy links to common searches you may perform using ViewSpecion.

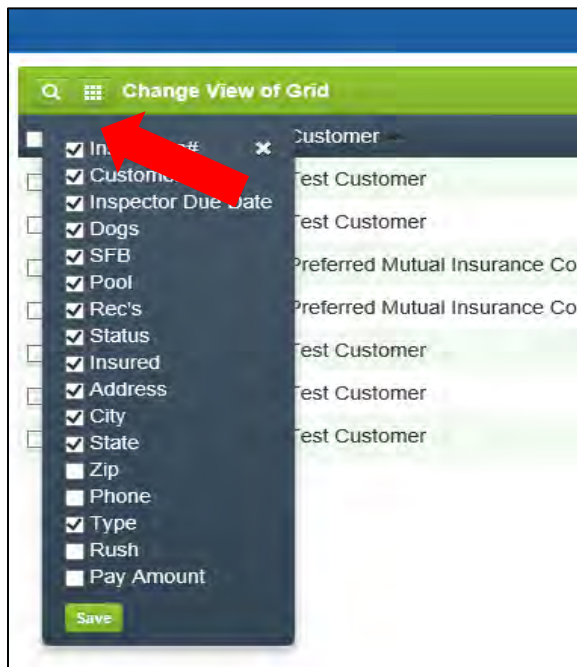
You can also go directly to **ViewSpecions** to access “The Grid” to view all cases.




The image shows the 'ViewSpecions' grid in the ViewSpecion application. It features a table with columns for 'Inspection#', 'Customer', 'Inspector Due Date', 'Dogs', 'SFB', 'Pool', 'Rec's', 'Status', 'Insured', 'Address', 'City', 'State', and 'Type'. The table contains seven rows of data, each representing a case. The first row has a red notification badge with the number '2' next to the 'Rec's' column. The second row has a red notification badge with the number '7' next to the 'Status' column. The third row has a red notification badge with the number '1' next to the 'Status' column. The fourth row has a red notification badge with the number '3' next to the 'Status' column.

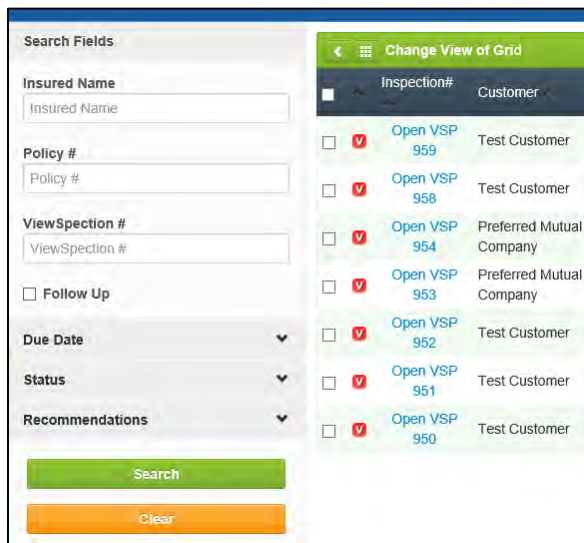
Inspection#	Customer	Inspector Due Date	Dogs	SFB	Pool	Rec's	Status	Insured	Address	City	State	Type
Open VSP 959	Test Customer	5/06/2015				2	Inspector Web Work	Jill Sprout	4 Main Street	Geneseo	NY	Vendor Residential Exterior
Open VSP 958	Test Customer	5/06/2015					Inspector Opened	Jill Sprout	4 Main Street	Geneseo	NY	Vendor Residential Exterior
Open VSP 954	Preferred Mutual Insurance Company	5/06/2015					Inspector Opened	Jack Homer	42 Oak Street	Geneseo	NY	Vendor Residential Exterior
Open VSP 953	Preferred Mutual Insurance Company	5/06/2015					Inspector Opened	Jack Frost	42 Oak Street	Geneseo	NY	Vendor Residential Exterior
Open VSP 952	Test Customer	5/06/2015					Inspector Opened	John Brown	44 Main Street	Geneseo	NY	Vendor Residential Interior
Open VSP 951	Test Customer	5/06/2015				1	Inspector Web Work	John Brown	44 Main Street	Geneseo	NY	Vendor Residential Interior
Open VSP 950	Test Customer	5/06/2015				3	Inspector Web Work	John Brown	44 Main Street	Geneseo	NY	Vendor Residential Interior

The grid provides access to all of your cases and has “hover” functionality built in. This allows you to “hover” over a field and view the contents without having to open the case.




Customizing Grid View

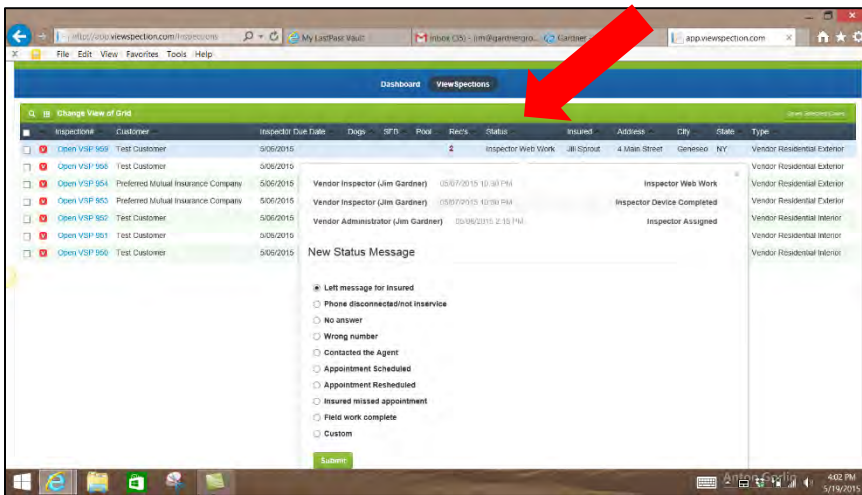
Select the **Change View of Grid** icon  to access the column list. Check or un-check the columns you would like to view. Select **Save** and this will be your default Grid view.



Searching the Grid

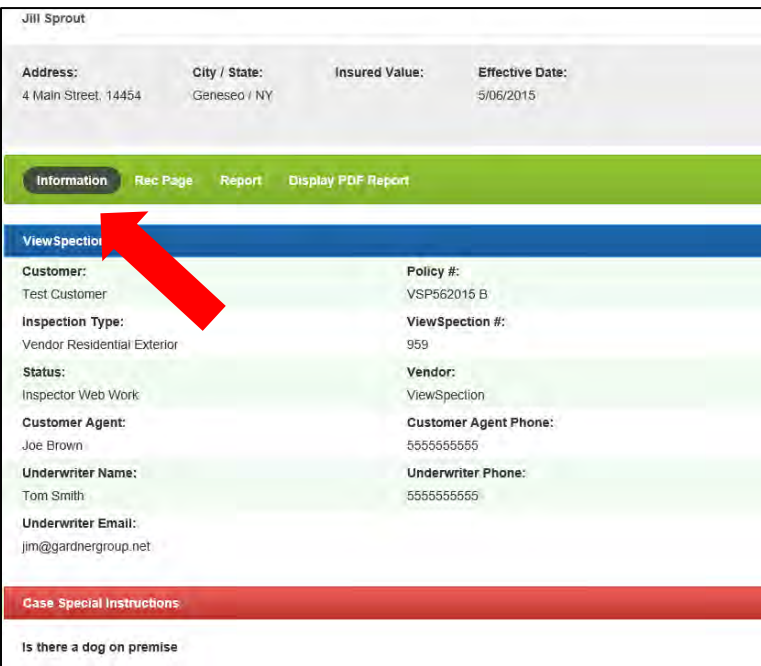
Click the **Search** icon  in the upper left corner to expand and display the search.

You can search by name, due dates, status and more.



Hover Function

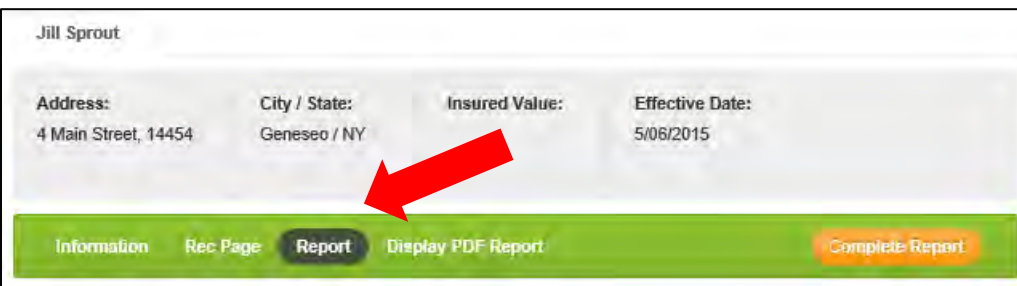
Some fields such as **Status** have a hover function built in and as you roll over the field you can view the contents of the field without having to open the case.



Information Tab

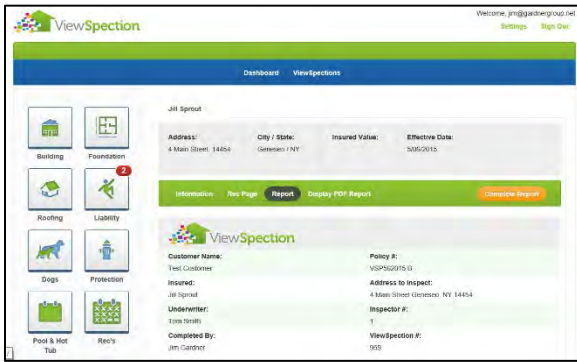
The green header bar has navigation to different sections of the ViewSpection.

The basic case information is displayed in the **Information** tab as well as all due dates and a listing of any actions which have been taken on the case.



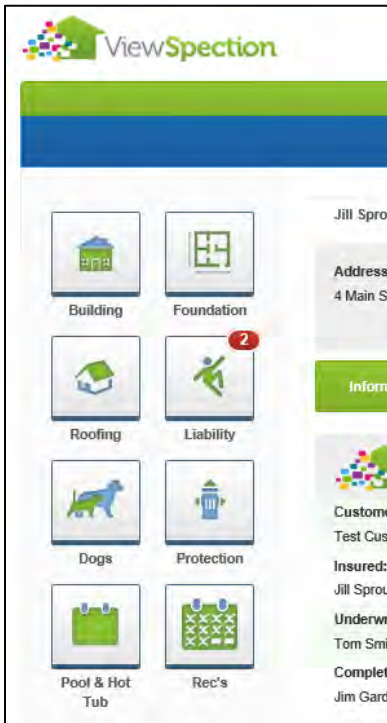
The Report

Select **Report** in the header bar to access the report view.



Report View

Basic case information is displayed at the top of the report page.

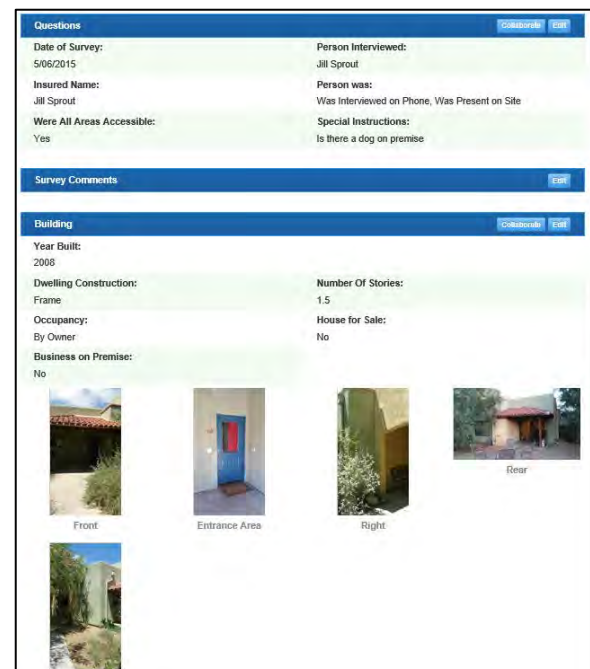


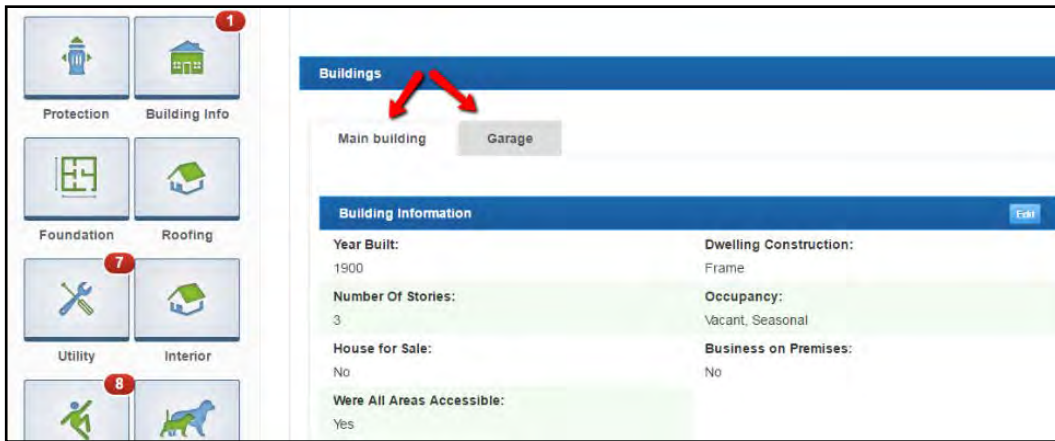
Report Navigation

The boxes on the left are navigation buttons which allow you to move directly to those sections in the report.

If there is a red button displayed, it indicates the presence of a defect which has been generated with the App or within the web platform.

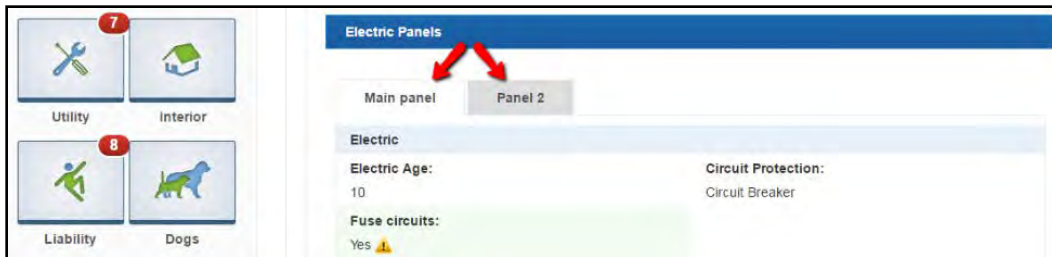
The **Building** section is the main 360 degree photo tour of the building.





Multiple Buildings

For properties with multiple buildings, click on the tabs in the **Building** section to toggle between the different buildings. The data and recommendations specific to that building will be displayed.



Multiple Utilities

The same goes for multiple utilities within a particular building. Click on the tabs to toggle between, and the appropriate data and recommendations will be displayed.

Liability

Collaborate Edit

Steps and Railings


Has Steps:

No


Driveway and Sidewalk

Has Driveway:

No



Sidewalk




Sidewalk 2


Yard

Debris in Yard:


Yes 🚩



Yard Rear



Fire Pit



debris

Each photo you took or question you responded to with the App has been inserted into the appropriate section of the report.

Images with the red and white “x” on them indicate a defect which has been identified and associated with a recommendation.

You may remove a defect by clicking the “x” within the image. This will remove the photo as well as the recommendation.

Dogs and Livestock

Collaborate Edit

Dogs Outside:

No

Dog(s) Outside suspected but not seen:

No

Dogs Inside:

No

Protection

Fire Hydrant:

Yes

Distance to Hydrant:

150

Distance to Fire Department:

1

Security System:

Unknown

Sprinkler System:

Unknown

Pool and Hot Tub

Pool on Premise:

No

Hot Tub on Premise:

No

Recommendations

1

Remove firepit as it creates a fire hazard

2

All trash and debris should be removed from the rear yard to reduce the fire hazard.

The recommendations are listed at the bottom of the report.

Building

Collaborate Save Cancel

Year Built:

Dwelling Construction:
☒ Frame
☐ Masonry Joisted
☐ Manufactured
☐ Log
☐ Other


Number Of Stories:
☐ 1
☒ 1.5
☐ 2
☐ 2.5
☐ 3
☐ 3.5


Number Of Families:


Occupancy:
☒ By Owner
☐ By Tenant
☐ Multi-Family
☐ Vacant
☐ Seasonal
☐ Student
☐ Could not Determine


House for Sale:

Business on Premise:



Front


Entrance Area


Right


Rear

Editing

Select the Edit box  in the upper right corner of any section and you access the editable questions and images for that section.

Any responses may be edited.

Questions

Collaborate Save Cancel

Date of Survey:

Person Interviewed:

Insured Name:

Person was:
☒ Was Interviewed on Phone
☒ Was Present on Site
☐ No One was Present on Site
☐ No Contact was Successful

Were All Areas Accessible:

Contact Was Cooperative:

Diagram's Dimensions Were:

Special Instructions:

Special Instructions Response:

Survey Comments

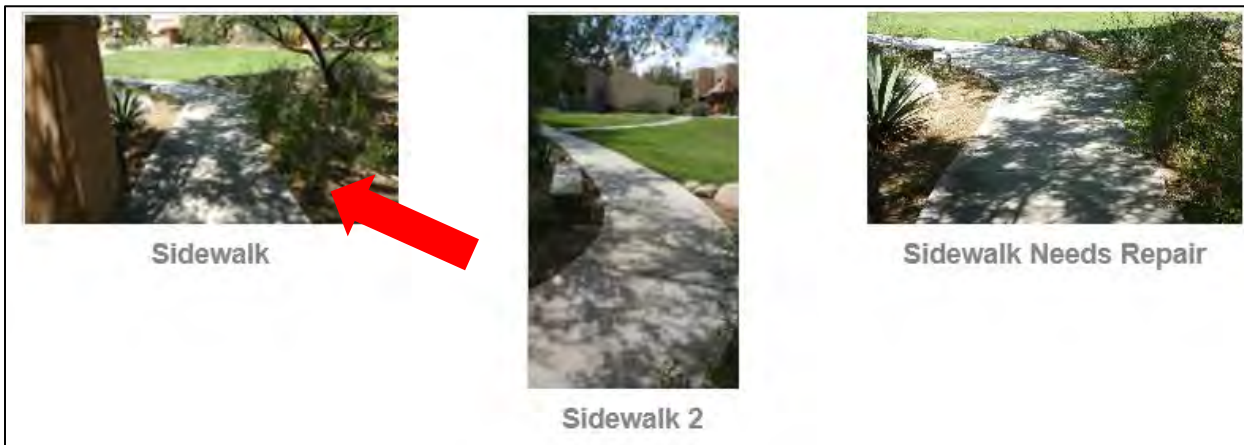
Save Cancel

Survey Comments:

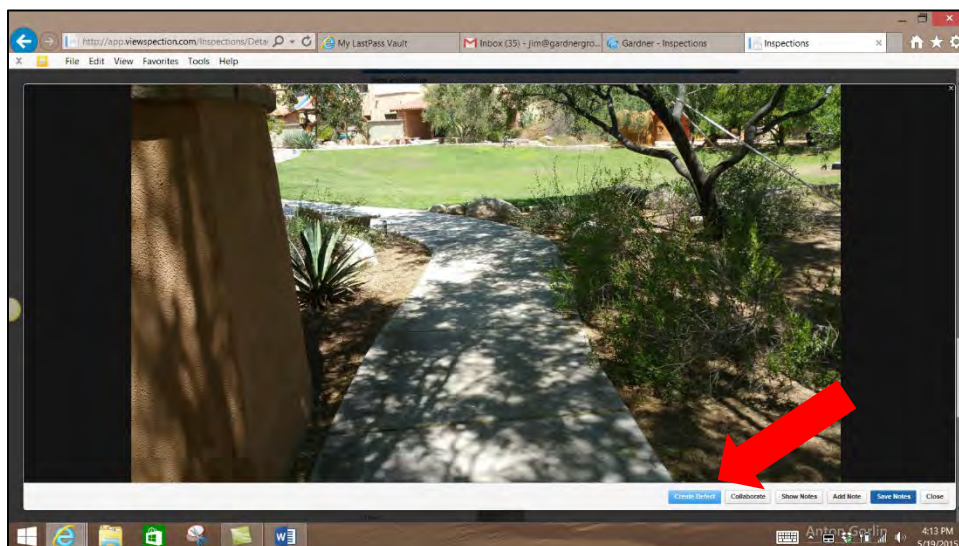
Most answers can be generated while using the App function but the web platform provides an option to add more information or to edit your original responses.

The **Survey Comments** are accessed from within the web platform to generate summary narrative before the case is sent to quality assurance.

Generating Defects



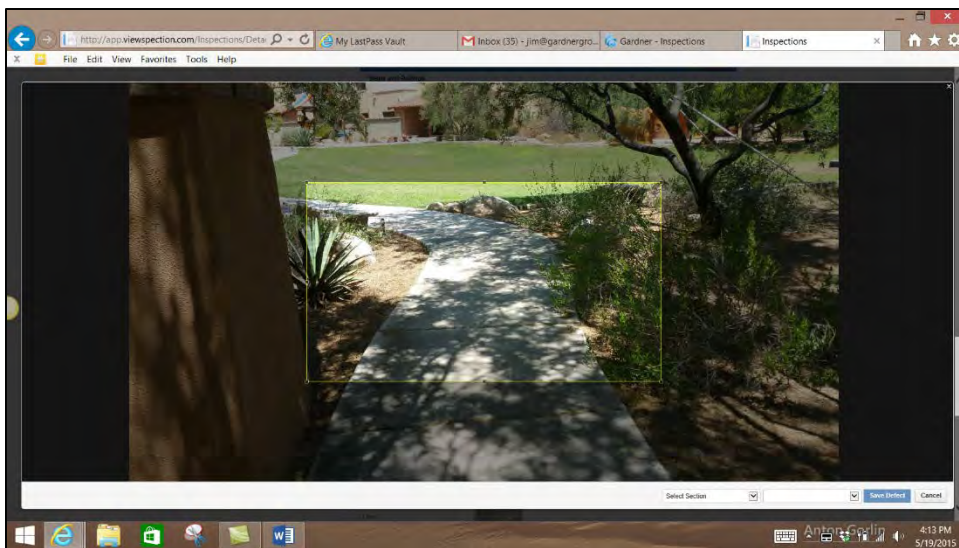
Select a photo to begin the defect creation process.



Once selected, the image is in full HD view and can be reviewed for the presence of possible defects.

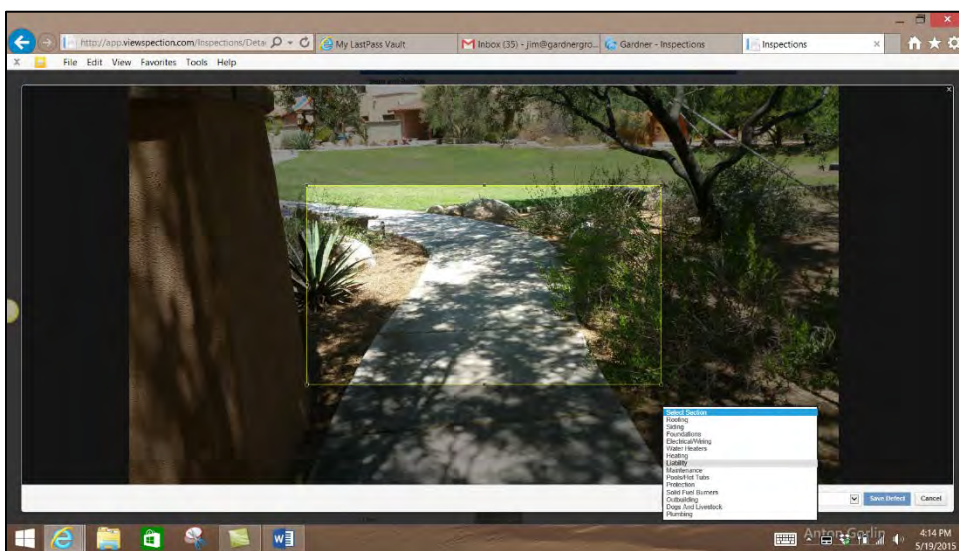
Recommendations can only be generated by associating them with an image.

Select **Create Defect** and a selection box appears on the screen.



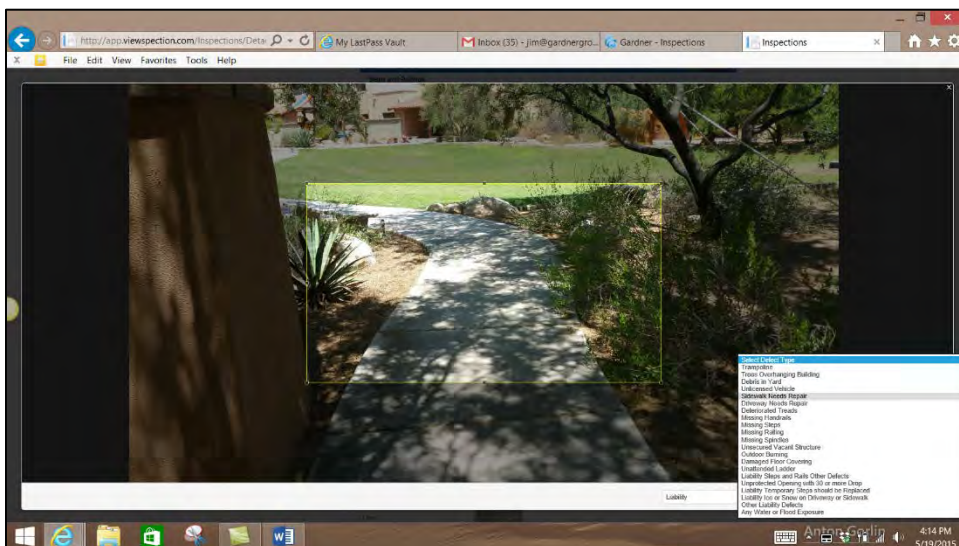
This selection box is resizable. Adjust the box size to encompass the defect area.

This selection will crop the photo for the defect photo.



Select the section from the pull down menu which matches the defect you are working with.

In this case, you would select **Liability**, for example.



Select the defect.

This will generate a new defect photo in the liability section as well as create a recommendation in the rec list section.

These defects can be removed by clicking on the “x”, in the Report view.

Driveway and Sidewalk

Has Driveway:
No



Sidewalk Needs Repair:
Yes ⚠

Sidewalk

Sidewalk 2

Sidewalk Needs Repair

The new defect photo has been generated in the Sidewalk section and has the default label applied.










The labels can be edited as desired, just click on the edit button , type the new label and click the save icon  in the upper right corner of that section.



Recommendations	
1	Remove firepit as it creates a fire hazard
2	All trash and debris should be removed from the rear yard to reduce the fire hazard.
3	The sidewalk should be repaired to present a smooth and even walking surface and reduce the tripping hazard.


The Recommendation list at the bottom of the **Report** page has been updated to reflect the new defect.

InformationRec PageReportDisplay PDF Report

Recommendations

Defect	Rec #	Recommendation	Fields	Edit	Delete
	1	Remove firepit as it creates a fire hazard			
	2	All trash and debris should be removed from the rear yard to reduce the fire hazard.			
	3	The sidewalk should be repaired to present a smooth and even walking surface and reduce the tripping hazard.			

In the header bar you can select **Rec Page** to view and edit the recommendations. Select the Edit icon  to make changes to the recommendation text or choose the Delete icon  to remove the recommendation entirely.

In the  mode, you may edit the **Defect** label and the Defect **Content**.

Complete Report

Almost there! When you have made all edits to your report, select **Complete Report** and you have two options: **Send to QA** or **Quality Assurance and/or Download Report** if you would like to retain a PDF copy.

Prior to sending the report to QA you have an option to add any notes which may assist the reviewer.

Support

Please e-mail us directly for any questions or issues you may experience.

We will respond as soon as possible.

Your feedback is very valuable to improving ViewSpection and we welcome all comments.

Send all comments or requests for support to:

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