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Introduction
The INSPI2 program was developed by Safeguard Properties to take advantage of wireless connectivity to the Internet. This technology allows inspection results to be directly entered into the application while in the field thus diminishing the need to enter paper records into a home office computer. In addition, INSPI2 is Windows based and will not require “hot syncing” to and from a handheld Pocket PC and personal computer. This will improve the speed at which an inspector and Safeguard receive new orders, results, and communication.

The INSPI2 program offers features which will increase client performance while offering more work volume to our inspectors. INSPI2 is web-based, which means the data is no longer stored on the POCKET PC or PC. The data is stored on Safeguard’s Internet servers into which the inspector’s Pocket PC or laptop computer will connect through the Internet. You will have the ability to be connected 24 hours a day if wireless Internet service is available in your area. This feature allows our inspectors to receive new orders all day, versus only late at night when you return to the office. In addition, this technology enables Safeguard inspectors to receive and respond to Safeguard inquiries while in the field.

INSPI2 also has a built in subcontractor management system. This system allows inspectors who use subcontractors to run reports and determine how efficiently they are completing their orders. INSPI2 also offers more options for assigning work, reviewing work, reviewing photos, sending messages, and monitoring open orders to these subcontractors.

Technical Requirements
INSPI-2 will run on laptops, tablets, and Pocket PCs as long as they are running Windows 2000, Windows CE (2003), or Windows 2005 and 2008. The technical requirements for each of the three compatible options are listed below. Choose the option that will work best for your operation.

NOTE: The INSPI2 application will NOT run on a Palm device.

Laptops and Tablets
Windows 2000 or newer
- 802.11 wireless, Bluetooth, or cellular data card that allows Internet connectivity
  Determine which option works best based on the availability of 802.11 wireless connectivity and hot spots in your area versus cellular data connectivity
- 128 MB RAM (256 MB recommended)
• 1 GHz processor (minimum)
• Ability to transfer photos from your current digital camera, in the field, using a USB port and cable

Pocket PCs Requirements
• Windows Mobile 2003, Windows Mobile 5.0 (2005), Windows Mobile 6.0
• 64 MB of RAM (minimum 128 MB Recommended)
• 400 MHz processor (minimum)
• 802.11 wireless, Bluetooth, or cellular data card that will allow connectivity to the Internet
  (Determine which option works best based on the availability of 802.11 wireless connectivity and hot spots in your area versus cellular data connectivity)
• At least one Secure Digital (SD) or Compact Flash (CF) expansion slot for added memory and communications
• At least 32MB SD, Fast Access SD card, or CF external memory card
  Some devices have limits on the size of external memory; check with the manufacturer
• Screen dimensions compatible with displaying 4.65 inches x 2.8 inches

We recommend you verify that 802.11 wireless connectivity is available in the area before purchasing a device with only 802.11 wireless connectivity.

Hardware Recommendations
The INSPI2 program requires an external SD (Secure Digital) or CF (Compact Flash) memory card for data storage. While it is possible to swap the Internet and memory cards, we highly recommend the purchase of one of the following:
• A device containing both an SD and CF slot in addition to an SD Fast Accessing memory card and a CF wireless card
  OR
• A device that contains both an SD and CF slot in addition to a CF memory card and an SD wireless card with Fast Access
• A combination memory/wireless card that will fit into the SD or CF slot
• A device that has built-in Internet capability via cellular or 802.11 wireless connectivity and an external memory card

**Recommended Technology**

Safeguard recommends the use of a Pocket PC with a built-in digital camera.

**Desktop and Pocket PC Installation Instructions**

Two installation programs are available; one for the PC and another for the Pocket PC version. An installation link is available on [https://inspi2.safeguardproperties.com](https://inspi2.safeguardproperties.com) to each program for your convenience.

**Desktop Version**

Install this version only when using a Desktop, Laptop, or Tablet PC

**NOTE:** If you are using Windows Vista or Windows 7, you MUST be logged on as an administrator to download this program.

1. Log in to the INSPI2 website
   Your login ID is the inspector code used by Safeguard in all uppercase
2. Add [https://inspi2.safeguardproperties.com](https://inspi2.safeguardproperties.com) to your list of trusted websites within your browser’s security settings
   Make sure the above website is not a blocked site in your anti-virus software
   a. Activate your Internet Explorer’s TOOLS menu
   b. Choose the INTERNET OPTIONS submenu
   c. Select the Security tab
   d. Click the Trusted Sites Icon
   e. Click the Sites button
f. Enter the INSPI2
   https://inspi2.safeguardproperties.com
   website address

An INSPI2 website page returns

g. Click the Add button

i. Choose the next OK button

3. Activate INSPI2’s HELP tab

4. Download the desktop setup
   a. Click SAVE to begin the installation

   **NOTE:** Run will install the program and store information into your temporary Internet file folder. Save places a copy of the setup file into your computer's hard drive. Choose the preferred option.

   A progress box appears.

   b. Windows IE6 or XPSP2 users may see a Security Warning screen. Click Run to continue the installation.

   The InstallShield Wizard will run.
After this initial setup is completed, you may be prompted to install .NET framework before continuing with the INSPI2 installation. Refer to the .NET Framework Installation instructions in this document for more information.

c. Click the InstallShield Wizard’s Next> button

d. Choose Next> to accept the terms of the licensing agreement

e. Click Install on the Ready to Install the Program

f. Click OK when the CardManagement dialog box appears
g. Click **Finish** to complete the installation

The program will install a shortcut on your computer's desktop

![Image]

**NOTE:** Choose Update/Repair when downloading a new version after the initial install.

---

5. **Logging In**

   a. Open the INSPI2 program from your desktop
   
   The START menu may also be used for this function

   b. Click the **OK** button

   c. Type your username

   (Safeguard contractor code typed in all uppercase letters)

   Subcontractors: Type the user name our main contractor assigned you.

   d. Enter your password

   Follow the e-mail instructions sent from the INSPI2 system regarding password setup

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**Pocket PC Version**

Install the Pocket PC version if you are using a Pocket PC device.

1. Add [https://inspi2.safeguardproperties.com](https://inspi2.safeguardproperties.com) to your list of trusted websites
2. Ensure this website is not a blocked site in your anti-virus software
3. Install your Pocket PC’s Active Sync software to your desktop computer
4. Insert the S/D memory card into your pocket PC
5. Place the Pocket PC in the cradle and turn it on
6. Click on the website’s HELP tab from your desktop computer
7. Click the link to download the latest Pocket PC setup
   The Pocket PC must be in the cradle, powered on and connected to the PC
8. Insert a memory card into the Pocket PC so the order list can be saved
9. Choose your desktop as the save location then click SAVE to begin the setup
10. Unzip a zip file if necessary
11. Double click on the INSPI2PPC.exe file to begin the installation
12. Follow the instructions on the install shield
13. Click OK on each of the messages until the install is complete
14. Tap the Pocket PC’s START menu then PROGRAMS to access the INSPI2

**NOTE:** It is not necessary to install both the Pocket PC and Desktop version. The Pocket PC, Tablet PC, or Laptop can run reports and use the website without downloading additional software.

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**Password Assignments in INSPI2**

In an effort to increase security and conform to Safeguard’s information security policies, default passwords will not be created by the INSPI2 program. Upon adding a new inspector or subcontractor to the INSPI2 system, an email will be sent to that inspector’s address as it was entered in the system. As such, a valid e-mail address must be used when creating a new inspector. This e-mail will contain a hyperlink to the INSPI2 web.

The inspector must check their e-mail and click on the link provided.
1. As a new inspector, you must click on the link and type in your code. This code is case sensitive and must be typed exactly as it was entered by the main inspector or by Safeguard.
2. Create a new password and confirm it.

Passwords are case sensitive, require a minimum of 8 characters, must contain a combination of upper and lower case letters and have at least one number. Once a valid password is entered and confirmed, the following welcome message appears.

90 Day Password Policy
In order to meet federal and industry guidelines, Safeguard Properties, Inc. is REQUIRED to have a 90 day password policy in place. Electronic notifications will be sent to the e-mail address you provided on the Subcontractor Maintenance page. It is imperative that you check all email address on this page for accuracy. Any changes to e-mail addresses need to be made immediately so this important information is not missed.
Password Guidelines:
- Should be eight or more characters long
- Must contain at least one capital letter
- Must have a minimum of one lowercase letter
- Must include at least one number
- Should not be a word that can be found in a dictionary
- Will be valid for 90 days after a change
- Cannot repeat one of your last 4 passwords

Password Expiration Process:
A notification email will be sent 10 calendar days before your password is set to expire. Please change your password at that time. If you do not change your password, the Main INSPI2 page will display a countdown from the day of the first email until the day the password expires. A final prompt to change the password will be sent via email on the day the password expires. **Failure to change your password** at this point will result in your **INSPI2 account being locked**.

![NOTE: Locked accounts are denied access to INSPI2 as well as to all client applications. Contact your regional coordinator to have your account restored.]

Web System - Internet Functions
There are certain functions that can only be performed by accessing the INSPI2 website. Subcontractor management, reporting functions, and invoice review are among the functions that can only be performed through the Internet.

1. To access the INSPI2 Internet site log on to [https://inspi2.safeguardproperties.com](https://inspi2.safeguardproperties.com)
2. Enter your log in ID
3. Key in your password

The Home page appears.
**Home Tab**

The HOME tab displays a summary of all order activity for the day. It is also important because it allows you to change your password if needed.

You can simply click on any number to view the list of applicable inspection orders.

<table>
<thead>
<tr>
<th>Column</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>The number of orders by category in total for the day. This number includes all orders for the main user and their subcontractors.</td>
</tr>
</tbody>
</table>

**NOTE:** Due to security rules set forth by Safeguard’s clients, inspectors are not able to click the Back button on their Internet browser. A “Warning, this page has expired” message displays if this button is activated.

**Subcontractors Tab**

The SUBCONTRACTORS tab enables you to view, assign, and approve open orders that are sent to you by your subs. In addition, this tab contains all subcontractor management functions. Adding new subcontractors, deleting subcontractors, setting pricing, defining coverage areas, and setting caps would be done through Subcontractors tab. Any contractor will have the ability to create, view, and maintain subcontractors. If subcontractors are set up, only the main inspector who set them up will have the ability to view, maintain and pull reports on these subcontractors and their work.
Each subcontractor will be set up with a login ID number and password to access their orders via the Internet as well. However, they are not able to view anything that is not assigned to them. Subcontractors will have the ability to run reports for only their orders and invoices.

There are several pages on the Subcontractors tab. Each is accessed by clicking on a choice from the list on the left side of the screen. See details below regarding each page.

**Order Summary**
The Order Summary page lists all subcontractors and their corresponding orders (total, open, due today, late, completed, and follow up)

1. Click on the subcontractor’s name to view their contact information, caps, and Approval/Assignment options

   **NOTE:** The Maintenance page appears. The details regarding this page are outlined in the next section of this manual.

2. Click on any number in the order columns to list applicable orders

   **NOTE:** The Inspections tab displays. An explanation of this tab appears in another section of this manual.
**Maintenance**

The Maintenance page allows the main user to add, delete, and modify subcontractors and their Approval/Assignment parameters.

**Set-Up**

1. The subcontractor logs on to the website using the name assigned by the main user.
   The subcontractor receives an e-mail containing instructions regarding the creation of a password as described in the Password Assignments in INSPI2 section of this manual.

**General Information**

1. Enter all contact information (i.e. address, phone, cell phone, email address)
2. CAP field - used to assign a maximum number of open orders to each subcontractor. Leave blank if no maximum is to be assigned.

If there are other subcontractors in the area covered by an inspector with a blank cap, those inspectors will NOT receive any work. All work will go to the inspector without the cap. Please be mindful of this if you want work to be equitably distributed amongst subcontractors.)
# Approval/ Assignment Options

<table>
<thead>
<tr>
<th>Option</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hold New Orders</td>
<td>Temporarily overrides all settings and withholds orders for a certain timeframe (vacation, late work, etc)</td>
</tr>
<tr>
<td>Automatically send new orders to this Subcontractor</td>
<td>Assigns new orders to the subcontractor (up to the cap and within the territory) each time orders are received from Safeguard without approval or review from the main user</td>
</tr>
<tr>
<td>Automatically approve completed orders re-ceived from this Subcontractor</td>
<td>Automatically approves orders and transmits them to Safeguard each time the subcontractor connects to the Internet without approval or review from the main user</td>
</tr>
<tr>
<td>Automatically send follow up items to this Subcontractor</td>
<td>Enables Safeguard (or any parent contractor) to send follow up requests directly to the subcontractor for a reply. If this option is not selected the main user will receive and review all follow up messages and forward them to the subcontractor for a response.</td>
</tr>
<tr>
<td>Automatically approve follow up items re-ceived from this Subcontractor</td>
<td>Allows the subcontractor to respond directly to Safeguard’s follow up messages (or to the parent contractor if trust conditions are not established). Otherwise, responses are directed to the main user for review and approval.</td>
</tr>
<tr>
<td>Automatically send map codes to this subcontractor on order assignment</td>
<td>Allows the main inspector to enter and save a map code on the routing page and transfer that map code to the subcontractor when the order is assigned.</td>
</tr>
<tr>
<td>Allow Safeguard to send System Notifica-tions to this Subcon-tractor directly</td>
<td>Grants Safeguard permission to send new order, cancel, and flash messages directly to the subcontractor; otherwise the main inspector must notify subs of system changes.</td>
</tr>
</tbody>
</table>

**NOTE:** The main inspector will manually assign orders to the subcontractor on the initial set up of a new subcontractor.

**Field Explanations**

*Edit Territory List* - assigns a specified region (by zip code or zip code range, county, or state) in which the subcontractor is to receive work.

- Select a state first if to assign a subcontractor to a particular county. Once a state is selected you may choose a particular county.
- If the territory is blank the subcontractor will not automatically receive work.
Rank – this field allows the main inspector to assign priorities to different subcontractors in the same territories. For example if Mo and Larry both cover 44131, but Mo is more efficient the main inspector would assign the rank of 1 to Mo and 2 to Larry. Mo will now be assigned work before Larry. Any number (up to 10,000) may be used in this field. Any orders outside of the assigned territory list will automatically be given to the main inspector.

**NOTE:** Assign a rank to the main user as well, otherwise subcontractors will receive all work in their respective territories.

**Pricing**
The system offers the flexibility of assigning pricing parameters for general, rush, interior and insurance loss inspections to each subcontractor. Prices may be set to one of the following for each:

- **Pay** – used if the subcontractor will be paid a flat fee for each order
- **Keep** – indicates that the main inspector keeps a flat fee per order and the subcontractor is paid the balance invoiced to Safeguard
- **Percent Keep** – when the main inspector keeps a percentage on each order and the subcontractor is paid the balance invoiced to Safeguard

**Field Explanations**
- **Pay** – used if the subcontractor will be paid a flat fee for each order
- **Keep** – indicates that the main inspector keeps a flat fee per order and the subcontractor is paid the balance invoiced to Safeguard
- **Percent Keep** – when the main inspector keeps a percentage on each order and the subcontractor is paid the balance invoiced to Safeguard

**NOTE:** If prices are not entered the subcontractor will not see dollar amounts on invoice reports. This functionality acts as an Inspector’s management tool and does not affect payment from Safeguard.
1. Assign prices
2. Click **Update**

These prices will help with invoice reconciliation and appear on the invoice detail for the subcontractors.

**Assignment**

This Order Assignment page enables the main user to view a current list of open orders. It also allows main inspectors to assign orders to subcontractors.

1. Choose the Subcontractors tab
2. Pick the **Assignment** menu option
3. Choose the `{Assign To}` drop down box to select a subcontractor to whom the order will be reassigned
4. View their current list of orders
5. Double Click an order
The Edit Order Assignment box appears
6. Click **UPDATE** to save the changes
7. Choose **SAVE CHANGES** after all changes have been made to the order list

**Approval**

The approval page offers main contractors the ability to approve or reject results and follow ups that have been completed by their subcontractors. Once the main contractor reviews orders and deems the results to be acceptable, they may be forwarded to Safeguard. When a subcontractor is uses a sub, the subcontractor may either send the order to Safeguard or to the main contractor. This would depend on the approvals the subcontractor was granted by the main contractor.

1. Activate the Subcontractors tab
2. Choose APPROVAL
3. Click the drop down box to select a subcontractor
4. View the subcontractor's current list of items awaiting approval
5. Double Click any row to approve or reject results or follow up responses

6. Approve/Reject/Do nothing with the information
   Provide a reason why the results were rejected.
7. Click **UPDATE**
   **CANCEL** will exit the order and NOT save any changes
8. Choose **SAVE CHANGES** after all orders have been processed
   Select **CANCEL CHANGES** to clear the information just entered

**Logout**
This feature logs you out of the INSPI2 system and ends the session

**Photos Tab**
The Photos tab was designed to assist in the management and review of Photo Required Inspections. Photos may be added, labeled, and removed here.

The Photos tab will first display search options. Search for the completed order by either work order number or zip code to attach a photo. Address, City, or Loan number may be utilized with the zip code search function. These fields allow partial entry (typing “123” in the Address field will result 123 Main Street, 1234 Main Street, 123 Center Street, etc...).

1. Enter all search information
2. Use the **Find** button
   OR
3. Press [Enter]

A list of all possible work orders that meet the search criteria will appear. Only completed inspections that have not been billed by Safeguard will appear on the list. Once Safeguard bills the client, the inspector cannot send additional photos.

**CAUTION:**

Main contractors cannot attach photos to inspections completed by their subcontractors.

4. Double-click on the applicable inspection.
   The work order information will appear below the search fields. Click Add
Photo to begin attaching photos. Any photos previously sent to Safeguard through INSPI2 will appear in the box below the work order information.

You will no longer be able to attach a photo through results that were transmitted via the Desktop or Pocket PC version of INSPI2. In this case log onto the website and transmit photos to Safeguard if the inspection is photo required.

Photos can be sent through the Desktop version and the Pocket PC if they are attached while the inspector is completing the order. In order to do this, connect your PC/Pocket PC to a digital camera and attach the photo before the order is completed.

**NOTE:** Safeguard recommends cameras be set to automatically size photos to 640 x 480. This will add speed to the time required to upload photos to Safeguard.

**Adding Photos**

1. Verify the correct address/work order/loan number is selected
2. Activate the **Add Photos** button
3. Click in the {Photo Location} box
4. Choose the **Browse** button to access your photos
   INSPI2 automatically directs itself to this folder after you add a photo the first time.
5. Double Click the photo you wish to add to the order

The photo appears on INSPI2 in the manner shown above.

6. Add a description to the photo

A preset description may be used by scrolling to it and clicking on it.
OR
Use the “Other: With Description” option by typing a description into the box provided.

7. Click the **Add** button
8. Repeat the previous steps if you need to attach additional photos
The **Remove** button deletes incorrectly attached photos.
9. Click **Save Changes**
The **Cancel Changes** button removes all photos attached to the order.

| NOTE: | It is not necessary to include the loan number, work order number, or address. The system automatically performs this function. |

**Photo Search and Edit**
Information may be altered after you attached photos to an order and saved changes as long as the results were not sent to Safeguard. Follow the steps outlined below to edit photos.

1. Access the Photo Search and Edit page
2. Enter the order number that contains photos needing to be edited
The order appears on the screen.
3. Double Click the order
Any photo that you have attached will now be listed.
4. Double Click the photo that needs to be edited
   The Edit Photo screen appears.
5. Click the down arrow to choose the appropriate description or type
6. Choose **Save Changes**

**Completed Data Page**

The Completed Data Page is a listing of all of the orders that you have recently sent to Safeguard and is used to ensure that photos were attached to those orders. This page should be checked once in the morning and once in evening. Any orders for client code CMC will be listed in red. If any photos need to be attached, the inspector will need to click on the Main button and attach the photos on the Main photos page.

![Completed Data Page]

If the Photo Count field is blank, it means that no photo has been attached to the order.

**NOTE:** “Approved” in the Status column does not mean that the order has been approved by Safeguard. It just means that the order has been completed and sent to Safeguard by the inspector.

**Active X - Image Sizer**

ActiveX Control was installed on the web to reduce the size of photos being sent to Safeguard. This feature allows photos to be batched for faster transmission.

Install this program once. Before running the component for the first time, you must install a prerequisite application. The link and installation instructions are provided on the trouble shooting page.

**NOTE:** Ensure that you accept both “Active X” and “New Product Checker Controls” by clicking the **YES** button.
1. Follow all of the screen instructions and leave the default settings
2. Select the **Repair** option if prompted to Modify or Repair
   You may be required to reboot the PC.
3. Choose the **Photos** tab to reload the web page.
   Move to the next step if this does not rectify the issue.
4. Configure the security settings
   3. Select the **Tools** menu’s **Internet Options** feature
   4. Activate the dialog box’s **Security** tab
   5. Click the **Internet** icon
   6. Choose the **Custom Level** button
      The Security Settings dialog box appears
   7. Scroll down to locate the ActiveX controls and plug-ins area
   8. Verify the following settings:
      ° {Download signed ActiveX controls}: Prompt
      ° {Run ActiveX controls and plug-ins}: Enable
      ° {Script ActiveX controls marked safe for scripting}: Enable
   9. Click **OK** after confirming the settings
   10. Save the security settings for the zone
   11. Select **Yes**
   12. Click the **OK** button
5. Select the **Photos** tab
   The page reloads allowing web ActiveX controls to access your files.

Windows XP SP2
Some additional configuration is required for Windows XP SP2 (Service Pack 2).
Follow these instructions to configure your Windows XP SP2 machine in order to
use the ImgXSizer.

1. Open your Internet browser
2. Choose the TOOLS menu’s INTERNET OPTIONS feature
   An Internet Options dialog box appears
3. Select the Security tab
4. Highlight the **Trusted Sites** icon
5. Click the **Sites** button
6. Type https://inspi2.safeguardproperties.com into the {Add This Web Site
   To The Zone} text box
7. Choose the **Add** button
8. Click the **OK** button
9. Select the next **OK** button
10. Select the **Photos** tab and reload the web page
11. Return to INSPI2’s Photo tab

Popup blockers, personal firewall’s and Windows XP SP2 create issues in this
environment. Safeguard will analyze the situation and provide a solution.
You may be asked to use the single file method, which is slower, to remedy the situation.

**Follow Up Tab**

The Follow Up tab lists all orders Safeguard left open so additional information could be requested to support your results.

1. Select the order to view the follow up request

   ![Image showing the Follow Up tab interface]

   - **Message sent by Safeguard asking for additional information**
   - **Type a reply into the response field**
   - **Click SAVE to preserve changes**
   - **OR**
   - **Use Complete Follow Up to send a response to Safeguard**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAVE</td>
<td>Saves the response. The follow up item remains open until it is sent to Safeguard.</td>
</tr>
<tr>
<td>Complete Follow up</td>
<td>Saves the response and sends it to Safeguard for order billing.</td>
</tr>
</tbody>
</table>

**Follow Up Messages**

Do not respond to follow up messages advising that you will “get back to us ASAP”. Once you respond the message is sent to Safeguard and the follow up message disappears. You will not be able to respond since the message no longer exists.

**NOTE:** Follow up responses must be sent before adding more photos to the work order.
Reports Tab

Safeguard created several reports to assist you in managing work order volume. These reports are listed below by category.

Completed Order Reports
Completed Order Reports display invoice information. Invoices are automatically created by INSPI2 every day. All orders completed and transmitted in one day equal one invoice. The invoice number is the inspector code plus the date.

<table>
<thead>
<tr>
<th>Report</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice Detail 30 Days</td>
<td>Displays invoice details for the past 30 days</td>
</tr>
<tr>
<td>Invoice Detail User Selected</td>
<td>Lists invoice details over a specific date range. You select this range.</td>
</tr>
<tr>
<td>Invoice Summary 30 Days</td>
<td>Shows invoice summaries for the past 30 days</td>
</tr>
<tr>
<td>Invoice Summary User Selected</td>
<td>Lists invoice summaries over a specified date range. You choose this range.</td>
</tr>
<tr>
<td>Unpaid Cancelled Orders</td>
<td>Shows orders cancelled and unpaid for the past 30 days</td>
</tr>
<tr>
<td>Enhanced Photo</td>
<td>Lists all work orders that specific additional photos. This will include first time vacancies and orders for certain clients that require additional photos.</td>
</tr>
</tbody>
</table>

Open Order Reports
## Report

<table>
<thead>
<tr>
<th>Report</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Order Master 30 Day</td>
<td>Displays open orders due up to today’s date</td>
</tr>
<tr>
<td>Open Order Master User Selected</td>
<td>Lists open orders due within a specified date range. You select this range.</td>
</tr>
<tr>
<td>Open Order Sub 30 Day</td>
<td>Shows open orders due up to today’s date for your subcontractors.</td>
</tr>
<tr>
<td>Open Order User Selected</td>
<td>Displays open orders due in a specified date range. The date range and sub are selected by you.</td>
</tr>
<tr>
<td>Routed with Open Orders 30 Days</td>
<td>Lists open orders for the past 30 days with routing.</td>
</tr>
<tr>
<td>Routed with Open Orders User Selected</td>
<td>Shows open orders for a specified date range with routing.</td>
</tr>
<tr>
<td>Open Orders by Assignment Date from SPI for Current User</td>
<td>Lists open orders by the date of assignment from SPI for the current user.</td>
</tr>
<tr>
<td>Open Orders by Assignment Date for Sub Contractors</td>
<td>Lists the subcontractors’ open orders by date of assignment from SPI.</td>
</tr>
</tbody>
</table>

### Communications Tab

The communications tab allows you to monitor Safeguard memos and global messages sent to inspectors nationwide. The main INSPI2 user can monitor whether these messages were read you or your subcontractors.

### Messages

INSPI2 messages are broadcasted to all inspectors nationwide. These messages are also sent to subcontractors. The main user can see if they have been read.
All messages that have been read disappear when Safeguard removes them from the system. Marking a message as “read” will not automatically remove it from the screen or list.

Memos
The Memos feature allows you to access memos posted on Safeguard’s website. These publications pertain to industry news and alerts. The word “Memo” blinks to alert you of a new or old memo that needs to be read. It will continue to blink until all unread memos are read.

1. Double Click a memo
   A link connects you to the Safeguard Website
2. Read the memo
3. Activate the CLOSE button once the memo is read
4. Click the applicable month and year to view a list of all memos previously posted by Safeguard

NOTE: Main inspectors cannot determine if their subcontractors have read the most recent posted memos.

Routing
The Routing page allows you to sequence your orders or create a route for the day. Routing can be performed using the SORT, GROUP, or MOVE feature, or a combination of all three.

SORT
Sort your list of order numbers to meet your routing needs. Orders may be sorted first by order number, address, city, state, zip code, map code, sequence, due date, work code, 25-35 day orders and loan number.

Map codes are used by some to locate properties. Map codes are saved by property so they do not have to be re-entered the next time you are assigned work at the property. This code is defined by you. Enter data into this field using the following procedure.

1. Select the blank box to the left of the appropriate number in the first column
2. Click in the blank box above the Mapcode button
3. Enter your map code
4. Activate the Mapcode button
5. Click Primary sort to select the first filter
6. Choose Secondary sort to select the second filter
7. Activate the SORT button to sequence your orders

GROUP DATA
This function allows you to group random orders together. This group may then be moved all at once or sequenced.

1. Click the first order you wish to include into the group
2. Press the Shift or CTRL key and keep it down while clicking on another order
   Multiple orders are selected
3. Activate the Group button
   The orders will be grouped together
**MOVE**
The MOVE function allows you to reposition orders up or down in sequence on the routing list.

1. Click on the order you wish to move
   SHIFT Click will select multiple orders that are listed together (You cannot use the CTRL key to move non-consecutive rows.)
2. Enter the line number of the desired sequence
3. Click **MOVE**
The selected orders will be repositioned.

**Save The Route**
1. Select the first order to be completed
2. Press SHIFT and Click the last order on the route
   All orders routed for the day are highlighted
3. Click **Add**
   All orders will have a “Pending” status in the sequence column

4. Click **SAVE** to sequence the route

**NOTE:** Only orders containing a sequence number appear on the routing. Save your route, log into the Desktop or Pocket PC version of INSPI2. Activate the SORT option and choose “routing.” The recently created route appears on your Desktop or Pocket PC version of the program.
Remove allows you to eliminate an order/group of orders, from the sequence. This action may be performed either while the route is pending or after is saved and created.

1. Highlight the order/group of orders
2. Click REMOVE
   The sequence number disappears and the orders will not be included in the route.
3. Click SAVE to preserve the changes

CLEAR
This command allows you to clear the entire route and begin again with a clean slate.

1. Click CLEAR
   The sequence of the entire route is cleared

The INSPI2 routing function also allows you to import data to other mapping programs such as Microsoft Streets and Trips. The instruction set for these procedures appears in the Exporting Routing Information to Mapping Programs sections of this manual.

Knowledge Base
The Knowledge Base contains a list of issues/errors that were experienced by INSPI2 users. These issues’ respective solutions also appear here.

8. Double Click any issue to read its resolution
9. Click the Search button
10. Enter your issue or ID number
**Documents**

The Documents feature allows you to view documents that have been sent to you from the insurance loss team (estimates and scopes of work), from the bad address team (legal descriptions that will help you locate properties), or from other teams on an as needed basis.

When you receive an order from one of these teams there will be information directing you to view documents on the INSPI2 website. When you see that message log onto the INSPI2 website and click on the Communications Tab. After you have done that, click on the Document button on the left side of your screen.

The inspections with documents will be listed by order number and address. Double click on the line of the order that you want to view and the document will appear. You can then print out the document if necessary.

**Inspections Tab**

The Inspections tab lists all orders. These orders can be sorted by subcontractor or current status (open, completed, rush, canceled, void, etc.). Use the SEARCH function to locate specific orders or properties.
FILTER
Orders can be filtered by subcontractor, due date, or status (open, completed, canceled, etc.). This feature allows you to only see the selected criteria. Sort orders by due date to prioritize work or search for a specific property.

1. Select the filter type
2. Activate the FILTER button to refresh the screen
3. Enter the beginning and end date to begin the search
4. Click FILTER to view the results
5. Choose the LEGEND button to view color coded inspections that are based on due date
6. Click any column header to sort the orders
   Ascending order means A to Z or smallest to largest number.
Screen Tips

- Use the scroll bar at the bottom to view additional columns
- The camera icon indicates that the inspection is photo required
- Click on the “i” icon to view the work order instructions

Changing Responses On The Web
The INSPI2 website does not allow you to change your responses. Once you enter information and click **Next**, you cannot return to the previous question. If you make a mistake select the {Main} field and **OK** when asked if you wish to end the inspection. You will then need to re-enter all inspection information.

Updating Inspection Results on the INSPI2 Website
Safeguard discourages website use for data entry. Use the Desktop or PocketPC version of INSPI2 to enter your results. Use these directions if you must enter inspection results here.

1. Access the inspections page
2. Double Click the order that needs to be updated
3. Enter the date that the inspection was completed
   INSPI2 automatically defaults to today’s date for the completion date. Change this date by either clicking on the day and typing in the correct date or selecting the drop down box and clicking the completed date from the calendar.)
4. You will be asked if there is a change of address at the location **Yes**
Click the radio button next to the question
Advise what sources were used to verify it. You MUST select two choices
State what has changed about the address
Complete all appropriate fields

No
Leave the field blank and click **Next**

5. Answer the subsequent questions until you reach the Order Summary page

The amount and types of questions asked depends upon the work code and occupancy status. The system generally will not progress to the next question until the current question is answered. The only exception comes when INSPI2 permits more than one answer for a question.

**EXAMPLE**
You first choose white for the color and are automatically progressed to a “Color 2” screen. Do not choose white again if the home is only one color. Simply click the **NEXT** button to move on.

**View Inspection Results**
Results cannot be viewed once you enter and complete an inspection. Although these results are no longer stored on your computer they reside on Safeguard’s servers. Call your Regional Coordinator immediately and provide the correct results if you sent the wrong information to Safeguard.
**Search**
The Search function allows you find a particular order amongst all of your open orders, here's how:

1. Enter your search criteria (Mortgagor Name, Address, Loan # or Order #)
2. Click the binoculars
   The search results appear.

**Help Tab**
The help tab provides the manuals and information needed to perform your responsibilities as a field inspector.
<table>
<thead>
<tr>
<th>Item</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>INSPI2 User Manual</td>
<td>Use this website’s manual to understand how the site functions</td>
</tr>
<tr>
<td>Pocket PC Power Setting Recommendations</td>
<td>Holds information regarding Pocket PC shut offs between inspections. Following these tips will decrease the occurrences of “Dirty Shutdowns”.</td>
</tr>
<tr>
<td>Pocket PC Settings Reference</td>
<td>Contains detailed information regarding how to understand and change the settings on your Pocket PC.</td>
</tr>
<tr>
<td>Field Inspections Manual</td>
<td>Possesses comprehensive information regarding the orders sent to you by Safeguard and how those orders should be completed.</td>
</tr>
<tr>
<td>Inspection Sign In Sheet</td>
<td>Bring several Sign In sheets with you on inspections. A sheet must be completed when an interior inspection is completed at a property. While these sheets are normally left by maintenance contractors there may be instances when one is not posted. It is your responsibility to leave a sign in sheet.</td>
</tr>
<tr>
<td>Hope Now Sheet</td>
<td>Form that is delivered on certain types of contact attempt inspections.</td>
</tr>
<tr>
<td>INSPI2 FAQ</td>
<td>Lists frequently asked questions and provides links to their answers. Please check this application before calling the IT Help Desk with any issues or problems.</td>
</tr>
<tr>
<td>Client Change History</td>
<td>View various versions of the INSPI2 program and changes that changes made in each particular one.</td>
</tr>
<tr>
<td>User Training</td>
<td>Provides links to various video training sessions that are available online at all times. Training ranges from how to update bad address inspection reports to how to complete various tasks on the INSPI2 website and desktop versions.</td>
</tr>
<tr>
<td>Safeguard Support</td>
<td>This interactive feature allows the Safeguard Help Desk to better understand the technical issues an inspector is having. This is only used in certain situations and only when the inspector is speaking with a member of the Help Desk.</td>
</tr>
<tr>
<td>Access Forms</td>
<td>These are letters are authorization that are to be shown to gate guards and management companies at secured buildings and gated communities. Print a copy of each one and keep them in your car in case one needs to be shown.</td>
</tr>
</tbody>
</table>
The Help tab also provides links that allow you to download the latest versions of INSPI2 software.

**Cancellations**

Cancellations are removed from the PC and Pocket PC immediately when these devices are connected to the Internet. Follow these steps if the order was completed but is not on the INSPI2 system:

1. Log into the Internet
2. Locate the inspection
3. Send the results from the website

**Caution:** The inspection will only be posted on the cancel page for 24 hours after our client canceled the order. After the 24 hours has passed the inspector cannot send the results to Safeguard, and they will not be paid.

| NOTE: | If your subcontractor completed the inspection before it was canceled the main inspector still only has 24 hours to approve it and send the inspection to Safeguard. This will not be an issue for subcontractors who are automatically set to send results to Safeguard. |

**Pocket PC and Desktop Versions of INSPI2**

The INSPI2 versions for the PC and Pocket PC are similarly designed. These devices are the primary source for entering inspection results and transmitting orders to Safeguard. While connected, INSPI2 sends inspection results to Safeguard and receives new orders from us. New messages are also acquired at this time.
Options on the PC and Pocket PC

Messages
To read a message

1. Click on File and then Messages
2. Double click the message
   The text displays on the bottom half of the screen.
3. Click Exit when all new messages are read
   The list of open orders displays.

The Menu Bar
Use the following menu options when wishing to perform any of the following functions.

<table>
<thead>
<tr>
<th>FILE</th>
<th>Transmits orders, resends orders, reads messages, changes settings, or exits</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIEW</td>
<td>Shows all orders (completed, open, follow up...)</td>
</tr>
<tr>
<td>FIND</td>
<td>Searches for specific properties</td>
</tr>
<tr>
<td>SORT</td>
<td>Sorts the open orders by address, work code, due date, order number, routing, 25/35 day inspections, etc. INSPI2 defaults to a due date sort.</td>
</tr>
<tr>
<td>INFO</td>
<td>Displays the legend and current order statistics (open completed, canceled, etc.)</td>
</tr>
</tbody>
</table>
Completing Inspection Results
The following instructions outline how to enter inspection results through the Desktop or Pocket PC version of INSPI2. While results can be entered through the website, we suggest they be entered through the Desktop or Pocket PC versions of INSPI2.

1. Select the appropriate order
The box expands to show the complete address as well as property icons. The “i” icon will provide information about the order. The icon that has a magnifying glass over a piece of paper will take you into the order once it is clicked.

2. Provide the date the inspection was completed
INSPI2 automatically defaults to a completion date of today. Change this date by either selecting the day and typing in the correct date or clicking the drop down box and choosing the date on the calendar.

3. A second question asks if the property has a change of address

   Yes:
   Click the {Change of Address} radio button
   Choose NEXT
   Check two fields regarding the sources used to verify the address change
   Complete all fields that describe what changed about the address.

   No:
   Click NEXT

4. Enter the Inspector Name and Phone Number
5. Select an occupancy status
   Questions will differ depending on the occupancy status and type of inspection being requested.
6. Questions regarding the building type, construction type, color and garage appear. You may select two choices for these questions.

NOTE: While two screens are available to enter information, you will only need to enter your response into the first one. Place a response into both screens if two answers exist, otherwise only answer once.

If you select Other for any response, you will need to click in the text box provided and type in your response.

Failure to enter a response the first time prohibits the next screen from advancing.

Pop-Up boxes appear when:
- Safeguard recognizes discrepancies from our last inspection results.
- Advising that photos are required to support discrepancies. The order will not be billed until Safeguard receives all requested photos.

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>BACK</td>
<td>returns to the previous question</td>
</tr>
<tr>
<td>NEXT</td>
<td>advances to the next question</td>
</tr>
</tbody>
</table>

Info appears on either the upper or lower right corner of your screen next to Order. This button brings the instructions and order information (property address, client name and contact information) into view.
The order results summary display after the {Comments} field. This is the only opportunity to view inspection results before completing the order.

7. Click **Complete** to send the results to Safeguard
   The **BACK** button should be used if anything needs to be changed.
8. Activate the **Order** button then choose **Cancel** to cancel an order
   Once this occurs all information is cleared and will need to be re-entered.
   INSPI2 does not save any information.
A benefit of using the Pocket PC is that it will retain certain information from one inspection to the next. The information that it will retain pertains to the text entered into the Other fields as well the Inspector’s Name and Phone Number. This feature is only available for the Pocket PC version of the program.

1. To view previous Other responses, click on the drop down arrow at the end of the Other line.
2. Select the response by double clicking on it.
3. Once you click on the response, it will appear in the Other field
You can also select the Inspector Name and Contact Phone information from the drop downs available on the Pocket PC.

To add or remove from the list of options, click and hold on the drop down arrow. When you do this, a box will appear that will allow you to add or remove information from the drop down boxes.
Attaching Photos From A Pocket PC

1. Select the order from the open orders list

   The camera icon indicates photo required

2. Click the magnifying glass to begin entering results

3. Click ORDER at any time while entering the results

   The ORDER button may appear at the top or bottom of the screen depending on the Pocket PC.
5. Choose the ADD PHOTO menu option

6. Selecting the Camera Icon will activate the camera on your Pocket PC

7. After you take the photo, it will automatically appear on the Attach Photo screen

8. If you need to search for a photo that is stored on your Pocket PC, select the Add Photo icon

9. This will take you into the various folders in which the photo is stored

10. Use the stylus to choose the photo’s filename

**NOTE:** The photo either needs to be on the pocket PC via a built-in camera or it must be transmitted from the camera to the Pocket PC. Read your device’s handbook to obtain the proper instructions.
Adding Photos Using the Pocket PC or Desktop Version

Adding photos on the Pocket PC or Desktop Version is slightly different from the website process. You may add a photo at any point when entering the inspection information. There are two photo attachment options, the Single attachment option and the Multiple attachment option.

Single Attachment Option

1. Use the **Dock** button to determine the placement of the Single Add photo screen.

2. Activate the **Photo** button.

8. Choose a description from the list
   OR
   Click ‘Other’ and enter a description

9. Click **DONE** if only one photo is necessary
   **Click the “+” button** to attach more photos or a Camera if your device has a camera feature

10. Click **Done** when all photos are attached.
3. Click **Single**

![Multiple Photo Attachment](image)

4. Activate the **Add** button

5. Locate the folder that contains the photo

   The first time you will need to manually locate the appropriate directory. All subsequent times, INSPI2 will default to that folder.

6. Double Click the correct photo

7. Choose a preset description

   OR

   Choose **Other** to type your own description

   ![NOTE: Use the Remove icon to eliminate a photo you accidently selected. Use the left and right arrow keys to toggle between photos.](image)

8. Click **Done** when finished

**Multiple Photo Attachment**

1. Activate the **Photo** button
2. Click **Multiple**

3. The Multiple photo attachment screen will appear

4. Right click in the empty photo pane and select **Add Photos**
5. Locate the folder that contains the photo(s)

Note: The first time you will need to manually locate the appropriate directory. All subsequent times, INSPI2 will default to that folder.

6. Highlight the photos that need to be attached then click Open.

7. The photos will then appear on the Multiple photo attachment screen.

8. To label photos, highlight the photo or photos and double click on the description or drag and drop the description onto the photos.

9. When all photos have been added and labeled, click Save at the top of the screen.

---

**Product Support**

Contact the appropriate parties in the unlikely event one of the below issues arises.

<table>
<thead>
<tr>
<th>Issue</th>
<th>Responsible Party</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operational (i.e. missing orders, closed orders displaying as open, etc…)</td>
<td>Your regional coordinator</td>
<td>1-800-852-8306</td>
</tr>
<tr>
<td>Technical (i.e. installation, use of the INSPI2 pro-</td>
<td>Safeguard Properties’ Help Desk</td>
<td>1-800-852-8306 x 3999</td>
</tr>
</tbody>
</table>
.Net Framework 2.0 Setup

In order for INSPI2 to operate correctly your computer is required to have .NET Framework installed. If the INSPI2 program cannot detect this software you will be prompted to install it. Follow the steps outlined below if the installation process begins.

1. Click **Next>** to begin the installation. The .Net Frame work will automatically begin the install itself onto your device.

2. Choose the **NEXT>** button once the setup wizard appears.

3. Accept the terms of the license agreement and choose **Install>**. A Setup box appears.

The components will install. At times it will appear that the
installation has stopped but this is not the case. Allow the program time to work.

4. Click **Finish** when the installation is complete
Exporting Routing Information to Mapping Programs

The following steps illustrate how to import data from the INSPI2 routing function into a mapping program. Microsoft Streets and Trips is used in the examples below.

1. Create and save your route in the INSPI2 program
2. Click **Create Excel File**

![Image of INSPI2 interface]

3. Your orders will then appear in the text form shown below.

4. Click File and then Save as. Save this as a text file. It is recommended that you use the date as the document’s name.

5. Close the file
6. Open your mapping software

   The mapping software will have a {Data} field
7. Click on {Data}
8. Activate the **Import Data** button

   The Import Data folder appears
9. Set the “Files of type” to Text Files
   You will not be able to locate the imported files if this step is bypassed.
10. Open the file
11. Choose the “Tab” option as the field separator

12.. Click **NEXT**

13. Click **FINISH**

Your route appears in the mapping program. Make the necessary changes here.