Admin Overview

Inspection Reports

Editing a Report on Desktop

Reports can be edited while in **Draft**, **Pending Upload**, and **Ready for Review** statuses.

1. From the Inspect homepage, select **Inspection Reports**
2. Select a report status (you can remove other statuses by selecting the x by their name)
3. Select **Search** and choose a report
    - To make changes to an existing finding, select the three-dot menu to the far right of the finding
    - Select **Edit Incident**
    - Make any changes to the incident form and **Save**
4. To record a new finding, select the **X** beside a checklist question
    - Fill out the incident form and **Save**
5. When all checklist questions have been completed, select **Send** to submit the inspection

Advanced Search Features

1. From the Inspect homepage, select **Inspection Reports**
2. Select **Advanced Search** at the top of the page
    - Filter by **Inspectors** to view only reports that certain inspectors have contributed to
    - Filter by **Responsible Person** to review reports that are assigned to a Responsible Person
    - Filter by **Finding Status** to view reports with items that are “Ready for Verification”, “Not Resolved”, etc.
    - Filter by the subject of inspection in the **Party Inspected** field
    - Filter by dates by adjusting the inspection start and end date
    - Filter by **Location** of a finding (only applies to inspections with building/room data)
    - Filter by Routing Groups using the **Routed To** field
    - Filter by **Tags** to search for findings tagged by the inspection team
    - **Search by Keyword** for any/all term within the report, select the location of that keyword using the associated checkboxes

View All Inspections with Open/Unresolved Findings

1. From the Inspect homepage, select **Inspection Reports**
2. Select **Sent to RP** from the report status field and unselect all other statuses
3. Select **Search**

Verify Findings

1. Open an inspection report with open findings that require verification
    - To find reports that require verification, go to the advanced search and filter by **Ready for Verification** in the Finding Status field
2. Select the three-dot menu next to the finding labeled "Ready for Verification"
3. Select the applicable option to change the status of the finding
    - **Mark as Resolved**
    - **Mark As In Progress**
    - **Mark as Not Resolved**
        - If marked as "Not Resolved," the finding will be reassigned to the Responsible Person, and they will need to update the finding and mark it as Ready for Verification. To resolve the finding, an Admin or Inspector must verify the resolution.

Other actions with findings

4. Start a **Discussion** to discuss the findings
    - Individuals within the inspection program can be tagged in the discussion and will receive an email notification. This can be used to involve more individuals in the resolution or serve as a reminder of an open finding
5. Select **Incident History** to view the finding's history
    - This includes who marked the finding and who resolved it

Management

Adding Custom Inspection Lists

Custom lists are inspections performed on subjects managed by the checklist owner (fire extinguishers, departments, units, dining facilities, etc.)

1. From the Inspect homepage, select the **Management** tab
2. Select the **Location/People** tab
3. Select the name of the custom list from the dropdown menu on the left
4. Select the three-dot menu beside the search field
5. Select **Add**
6. Enter subject name, secondary information (description), building and floor information (if applicable)
7. Select **Add**

Make Changes to Custom Inspection Lists

1. From the Inspect homepage, select the **Management** tab
2. Choose the program that the checklist applies to
3. Select the **Location/People** tab
4. Select the name of the custom list from the drop-down menu on the left
5. Use the search field to find the desired inspection subject
6. Use the three-dot menu to the right of the search field
7. Select **Edit**
8. Make desired changes and select Save

Make Changes to Building and Lab Inspections

Building information is managed by the home campus and cannot be altered within Inspect. Lab group information is managed in “Profile”. Changes made affect all associated solutions (Chemicals, LHAT).

Mapping Departments to Buildings

1. From the Inspect homepage, select the Management tab
2. Select the **Location/People** tab
3. Use the search field to find the desired department
4. Select the three-dot menu beside the search field
5. Select **Edit**
6. In the “Building” field, search for the correct building
7. In the “Floor” field, search for the correct floor
8. Select **Save**

Add a Responsible Person

1. From the Inspect homepage, select the **Management** tab
2. Choose the program that the checklist applies to
3. Use the search field to find the desired subject/unit
4. Select the three-dot menu beside “Responsible Person”
5. Select **Add**
6. Search by name or email
7. Select **Add**

Note: Responsible Persons for lab groups are managed in “Profile”. Changes made affect all associated solutions (Chemicals, LHAT).

Delete a Responsible Person

1. From the Inspect homepage, select the **Management** tab
2. Choose the program that the checklist applies to
3. Select the **Location/People** tab
4. Use the search field to find the desired subject/unit
5. Select the three-dot menu beside the individual you wish to delete
6. Select **Delete**

Add an Inspector/Administrator

1. From the Inspect homepage, select the **Management** tab
2. Choose the program that the checklist applies to
3. Select the **Program Roles** tab
4. Select the three-dot menu beside "Program Roles"
5. Select **Add** and search by name or email
6. Select the desired role(s)
7. Select **Save**

Edit or Delete an Inspector/Administrator

1. From the Inspect homepage, select the **Management** tab
2. Choose the program that the checklist applies to
3. Select the **Program Roles** tab
4. Select the three-dot menu beside the person to be edited/deleted
5. Select **Edit** to add or remove a role
6. Select **Save**

   OR

1. Select **Delete** to remove a person from a program
2. Select the red **Delete** button

Add Routing Groups for Finding Resolution

By default, findings are routed to the Responsible Person for the department. However, you can add other entities that can be selected for the resolution of specific findings

1. From the Inspect homepage, select the **Management** tab
2. Choose the program that the checklist applies to
3. Select the **Routing** tab
4. Select the correct routing list from the drop-down menu at the top
5. Select the three-dot menu beside "Routing Group"
6. Select **Add**
7. Enter the name of the Routing Group
8. Select **Save**

Add Contacts for the Routing Groups

Contacts will receive notifications (if enabled for your group) and are responsible for findings routed to their specialty

1. From the Inspect homepage, select the **Management** tab
2. Choose the program that the checklist applies to
3. Select the **Routing** tab
4. Select the correct routing list from the drop-down menu at the top
5. Select the three-dot menu beside the Routing Group you wish to assign a contact to
6. Select **Add Person**
7. Search by name or email

Delete Contacts for the Routing Groups

1. From the Inspect homepage, select the **Management** tab
2. Choose the program that the checklist applies to
3. Select the **Routing** tab
4. Select the correct routing list from the drop-down menu at the top
5. Select the three-dot menu beside the Routing Group you wish to delete a contact from
6. Select **Delete Person**
7. Select the red **X** beside the person you wish to delete
8. Select **Done**

Add Tags

Tags can be used to associate checklist questions for data reporting

1. From the Inspect homepage, select the **Management** tab
2. Choose the program that the checklist applies to
3. Select the **Checklist** tab
4. Select the desired checklist from the drop-down
5. Select the three-dot menu beside "Tags"
6. Select **Add**
7. Enter the tag name
8. Select **Save**

Note: Tags can be automatically associated to findings if added to the question by default. See checklist question management for details.

Edit or Delete Tags

1. From the Inspect homepage, select the **Management** tab
2. Choose the program that the checklist applies to
3. Select the **Checklist** tab

4. Select the desired checklist from the drop-down
5. Select the three-dot menu beside the Tag to be edited
6. Select **Edit**
7. Enter the desired changes
8. Select **Save**

   OR

1. Select **Delete**
2. Confirm the deletion by selecting the red **Delete** button

Creating a New Checklist Category

1. From the Inspect homepage, select the **Management** tab
2. Choose the program that the checklist applies to
3. Select the Checklist tab
4. Select the desired checklist from the drop-down
5. Select the three-dot menu beside "Checklist Categories"
6. Select **Add**
7. Enter a category name
8. Select whether the set of questions can be repeated in the category multiple times
9. Select whether a category is required prior to the report being sent to the Responsible Person
10. Select **Save**

Edit or Delete Checklist Category

1. From the Inspect homepage, select the **Management** tab
2. Choose the program that the checklist applies to
3. Select the Checklist tab
4. Select the desired checklist from the drop-down
5. Select the three-dot menu beside "Checklist Categories" to be edited
6. Select **Edit**
7. Enter desired changes
8. Select **Save**

   OR

1. Select **Delete** to remove the category
2. Confirm the deletion by selecting the red **Delete** button

Note: that deleting checklist categories will affect reporting associated with those findings. All findings already associated with deleted categories will remain in the analytics dashboard.

Creating Checklist Questions

1. From the Inspect homepage, select the **Management** tab
2. Choose the program that the checklist applies to
3. Select the Checklist tab
4. Select the desired checklist from the drop-down
5. Select the three-dot menu beside the desired checklist category
6. Select **Create Finding**
7. Enter the Description and, if applicable, the default Action Plan, Default Tags, Default Routing Group, default tags and default Days to Resolve
    a. This information will automatically populate if a finding is created. If there is no default information or it needs to be changed during an inspection, the fields can be edited by the inspector as needed
    b. In order to associate default routing groups and tags to a finding, they must first be created.
        i. Default tags mean a finding marked as non-compliant will automatically be marked with a particular tag. This tag can be removed manually by the inspector
        ii. Default routing groups mean a finding marked as non-compliant will automatically be assigned to the stated routing group. This routing group can be removed manually by the inspector
8. Select **Save**

Edit or Delete Checklist Questions

Please note that deleting checklist questions will affect reporting associated with those findings All findings already associated with deleted questions will remain in the analytics dashboard.

1. From the Inspect homepage, select the **Management** tab
2. Choose the program that the checklist applies to
3. Select the Checklist tab
4. Select the desired checklist from the dropdown
5. Select the checklist item you wish to expand
6. Select the three-dot menu beside the question to be edited
7. Select **Edit**
8. Enter desired changes
9. Select **Save**

    OR

1. Select **Delete** to remove the question
2. Select the red **Delete** button