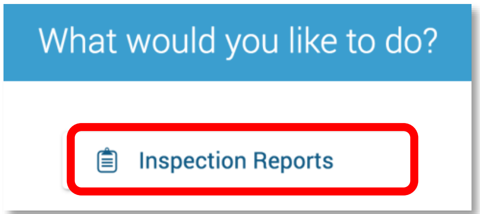
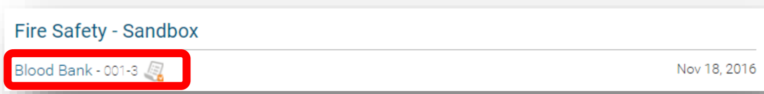
INSPECTION REPORTS

Reviewing Inspection Reports

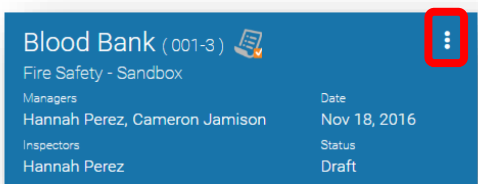
- Select the **Inspection Reports** button on the Home page



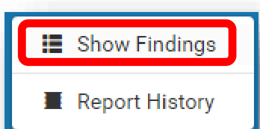
- Use the filters at the top of the page to search by name, date range, and status
- Enter **Search**
- Select the department name for the report you wish to view



- By default, only non-compliant items are displayed. To view all findings select the navigation dots in the blue field



- Select **Show All**

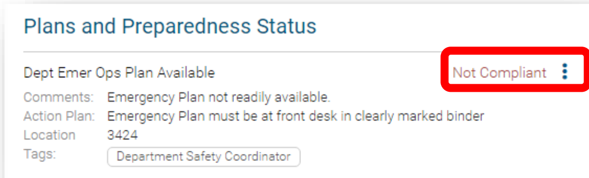


Changing the Status of a Report

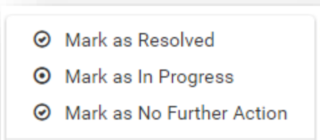
- Reports in **Draft** mode can be submitted by selecting the **Submit** button at the top of the report
- Reports in **Pending Upload** or **Ready for Review** status can be sent to the Responsible Person by selecting the **Send** button at the top of the report

Resolving Findings

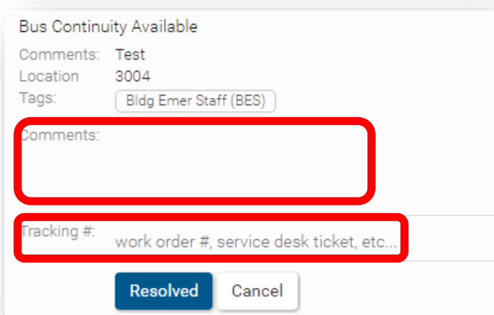
- Select navigation dots for the finding



- Select desired action from the following options:
  - Mark as Resolved
  - Mark as In Progress
  - Mark as No Further Action



- Enter comments and work order number (if applicable)



- Select Resolved/In Progress/No Further Action button to change the status of the finding

OPEN FINDINGS

View All Open Findings

- Select the **Open Findings** tab on the Home page
- Use the filters at the top of the page to search by name, date range, and status
- Enter **Search**

MANAGEMENT

Making Changes to Departments

- Select the **Management** tab on the Home page
- Selection the **Location/People** tab
- Use the search field to find the desired department
- Select the navigation dots beside the search box
- Select **Edit**
- Make desired changes and select **Save**

Adding New Departments

- Select the **Management** tab on the Home page
- Selection the **Location/People** tab
- Select the navigation dots beside the search box
- Select **Add**
- Enter department name and description
- Select **Save**

Add a Responsible Person

- To add a Responsible Person to a department, select the **Management** tab on the Home page
- Selection the **Location/People** tab
- Use the search field to find the desired department
- Select the navigation dots beside "Responsible People"
- Select **Add**
- Search by name or email
- Select **Add**
- Use the **"Can't Find Person?"** link for information on adding someone not found in the system

Delete a Responsible Person

- To delete a Responsible Person to a department, select the **Management** tab on the Home page
- Selection the **Location/People** tab
- Use the search field to find the desired department
- Select the navigation dots beside "Responsible People"
- Select **Delete**
- Select the red **Delete** button

Add an Inspector/Administrator

- To add an Inspector or Administrator, select the **Management** tab on the Home page
- Selection the **Program Roles** tab
- Select the navigation dots beside "Program Roles"
- Select **Add**
- Search by name or email
- Select the desired role(s)
- Select **Save**

Edit or Delete an Inspector/Administrator

- To add an Inspector or Administrator, select the **Management** tab on the Home page
- Selection the **Program Roles** tab
- Select the navigation dots beside the person to be edited/deleted
- Select **Edit** to add or remove a role
- Select **Save**

OR

- Select **Delete** to remove person from program
- 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 (ie Facilities, Housekeeping, etc)
- Select the **Management** tab on the Home page
- Selection the **Routing** tab
- Select the navigation dots beside "Add Routing Group"
- Select **Add**

- Enter the name of the Routing Group
- Select **Save**

Add Contacts for Routing Groups

- Contacts will receive notifications (if enabled for your group) for findings routed to their specialty
- Select the **Management** tab on the Home page
- Selection the **Routing** tab
- Select the navigation dots beside Routing Group you wish to assign a contact to
- Select **Add Person**
- Search by name or email
- Select "Cancel" to close the search feature

Add Tags

- Tags can be used to associate checklist questions for data reporting
- Select the **Management** tab on the Home page
- Selection the **Checklist** tab
- Select the navigation dots beside "Tags"
- Select **Add**
- Enter the tag name
- Select **Save**

Edit or Delete Tags

- Select the **Management** tab on the Home page
- Selection the **Checklist** tab
- Select the navigation dots beside Tag to be edited
- Select **Edit**
- Enter desired changes
- Select **Save**

OR

- Select **Remove** to remove the tag
- Select the red **Delete** button

Creating a New Checklist Category

- Select the **Management** tab on the Home page
- Selection the **Checklist** tab
- Select the navigation dots beside "Checklist Categories"
- Select **Add**
- Enter category name
- Select whether category is required prior to report being sent to Responsible Person
- Select **Save**

Edit or Delete Checklist Category

Please note, that deleting checklist categories will affect reporting associated with those findings

- Select the **Management** tab on the Home page
- Selection the **Checklist** tab
- Select the navigation dots beside Checklist Category to be edited
- Select **Edit**
- Enter desired changes
- Select **Save**

OR

- Select **Remove** to remove the finding
- Select the red **Delete** button

Creating Checklist Questions

- Select the **Management** tab on the Home page
- Selection the **Checklist** tab
- Select the navigation dots beside the desired checklist category
- Select **Create Finding**
- Enter Finding, Action Plan (if applicable), Default Tags (if applicable)
- Select Save

Edit or Delete Checklist Questions

****Please note, that deleting checklist questions will affect reporting associated with those findings***

- Select the **Management** tab on the Home page
- Selection the **Checklist** tab
- Select the navigation dots beside Finding to be edited
- Select **Edit**
- Enter desired changes
- Select **Save**

OR

- Select **Remove** to remove the finding
- Select the red **Remove** button