inspectiTRAC™ Manager – Quick Lesson

Assign Corrective Actions

The Assignment of Corrective Actions gives an Admin the ability to view all the unresolved items and assign each of them to a Manager user. Once a corrective action is assigned, the Admin can set up an Action Series for notifications.

This Quick Lesson will present how to assign a corrective action to a user and then create an Action Series to notify that user of the assignment.

Log into Manager
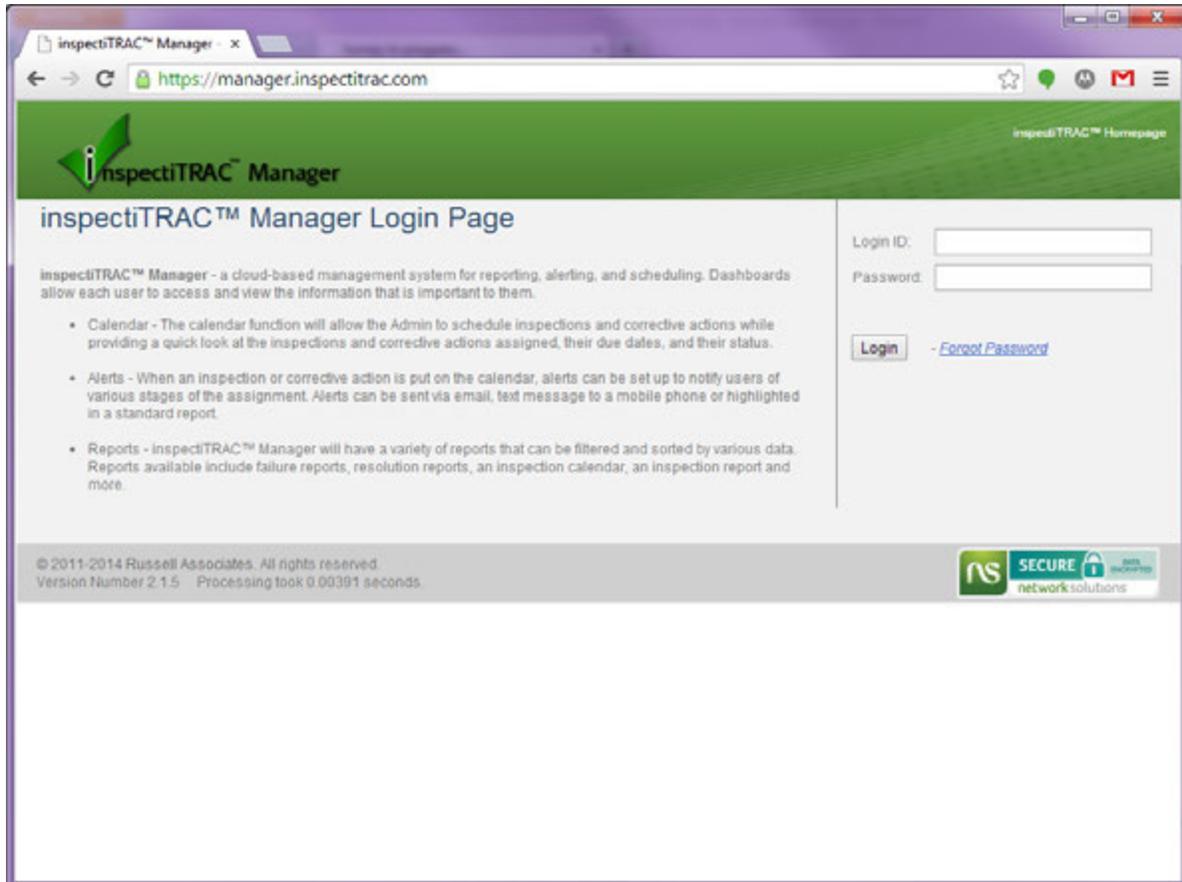
Use your Login ID and Password to securely log into the Manager website.

Select Assign Action

From the Resolutions menu, select Assign Action.

The Assign Corrective Action screen displays all the inspections that have unresolved items. You can see if a corrective action has been assigned to someone by looking under the "Assigned To" column.

On this screen, you can see that we haven't yet assigned any corrective actions.

Click on the Inspection Name link (in this case, "Demo"), to begin assigning a Corrective Action.

Select the Item

Check the box next to the item you want to assign to a user. In this case, there is only one unresolved item in this inspection, so we will check the box and click the Continue button.

Assignment Screen

The Assignment Screen is where you select the user or users to whom you are assigning this corrective action.

1. Select the user(s). After selecting units, the user's names will appear in the box on the right. Select users by clicking on their names.
2. Select the Due Date for this action using the calendar feature.
3. Select the time. The date and time are important for sending out notifications.
4. Select the Priority Level of this corrective action.

Once you have completed this screen, click on the Assign Actions button.

Add an Action Series

The system returns to the Assign Corrective Actions screen and is ready for you to assign another corrective action.

The red arrow in the graphic above shows that the Corrective Action for the Demo inspection is assigned to Tom Doheny. You can assign more than one person to a Corrective Action.

The red circle in the graphic above is highlighting the link to add an Action Series. This functionality can also be found under the Notifications menu.

We will click on the link to add an Action Series to this assigned action.

Assign Corrective Action Series
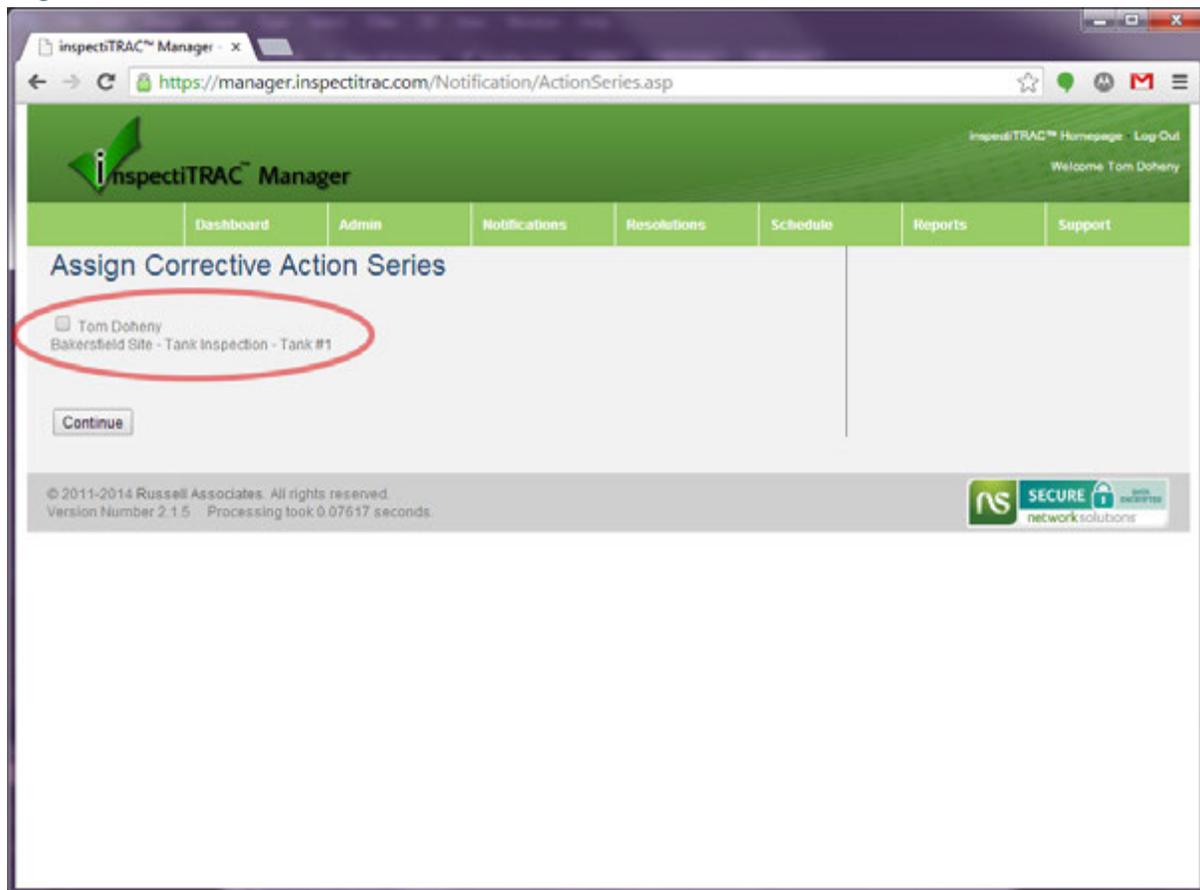
To begin assigning a corrective action series, you must first select the Assigned Corrective Action. This screen will display all the Assigned Corrective Actions in the system. In this case, we only have the one we just assigned.

Check the box next to the Assigned Corrective Action and click the Continue button.

Step 1 – Type and Date of Notification

On this screen, you will specify the type of notification you wish to create and when that notification will be sent. Below are the options.

- Notice that an action has been assigned – This notification is intended to inform the user that they were assigned a corrective action. This notification is sent to the assigned user immediately upon assignment.
- Reminder before a resolution is due – This notification can be sent as a reminder to complete the corrective action if it is not already resolved. You will specify how many days prior to the due date that you want this notification sent.
- Reminder after resolution is due – This can be used as a notification that a corrective action was due. It will be sent out whether or not the item was resolved. This can be used to remind a user that a resolution should have been completed by the due date. You will specify how many days after the due date that this notification will be sent.
- Notice that a corrective action was completed – This can be used to inform others about the completion of a corrective action. You must specify the additional users that will receive this notification in a later step. This notification will be sent immediately upon the entry of a resolution for the item.
- Notice that a corrective action was NOT completed – This notification is sent out after the due date has passed and there was not a resolution entered for this item. You will specify how many days after the due date that this notification will be sent. If there was a resolution to the item, this notification will NOT be sent.
- Notice that a corrective action was attempted, but could not be resolved – This notification is for those times when a Corrective Action User makes a note in the Resolution, but does not mark the item resolved. A resolution note may be entered to show that a part was ordered, for example, but the item cannot be marked resolved until that part is received and installed.

Step 2 – Select Notification Type

After clicking Continue on the previous step, you are prompted to set up your notification.

You can send an SMS Text Message or an Email to the recipient. To receive a text message, the recipient must have a cell phone number set up in the system and they must check the box in their profile that allows them to receive text messages. To receive emails, the recipient must have an email address set up in their profile.

Enter the information to be sent in the appropriate boxes on this screen.

1. If you want a description of the issue attached to the email, check the box near the bottom. This will append information concerning the issue, including the due date, below the email text you entered in the box.

Click the Continue button when finished.

Step 3 – Send Notification to Additional Users
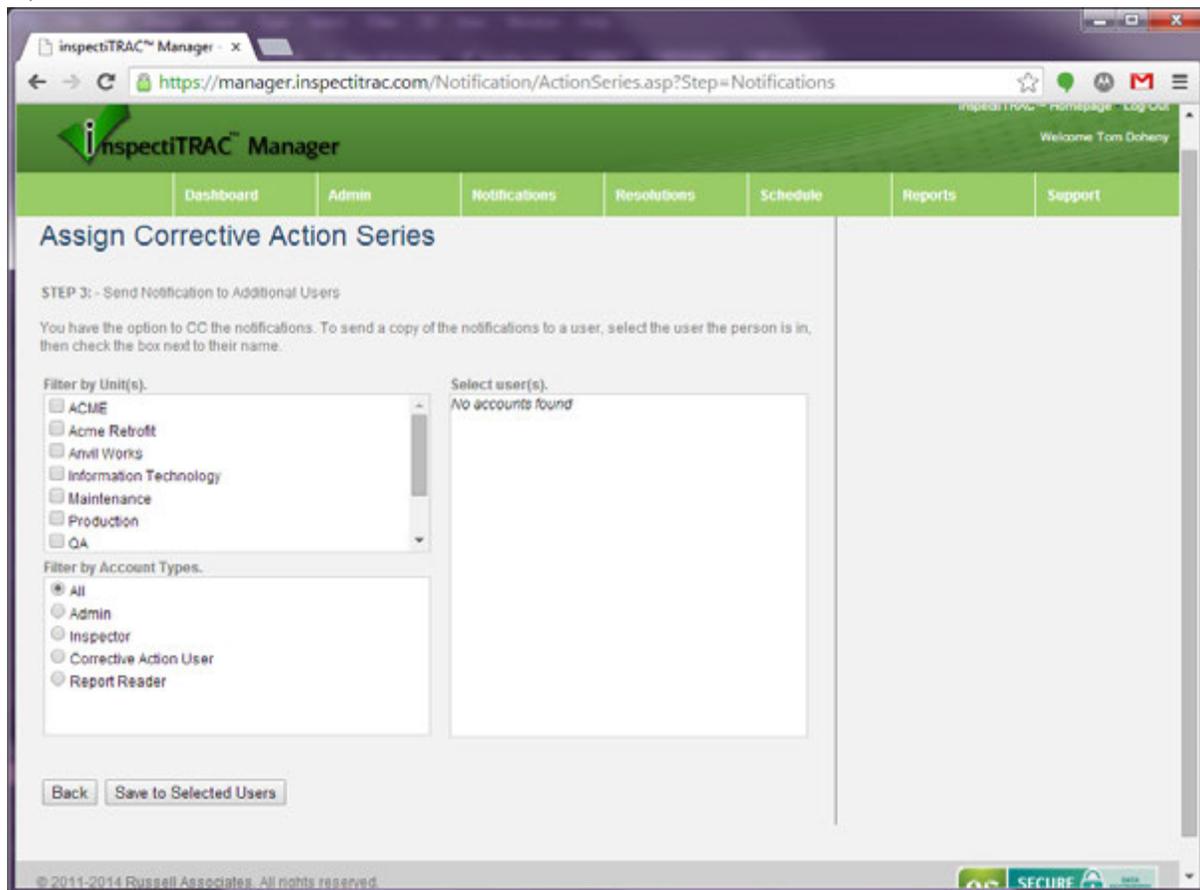
The third step in this process is the option to send a copy of this notification to other users. If you would like another user to be CC'd on the email, select their name(s) on this screen. This step is optional.

Click on the "Save to Selected Users" button to complete this Assign Corrective Action Series.

Assignment Complete
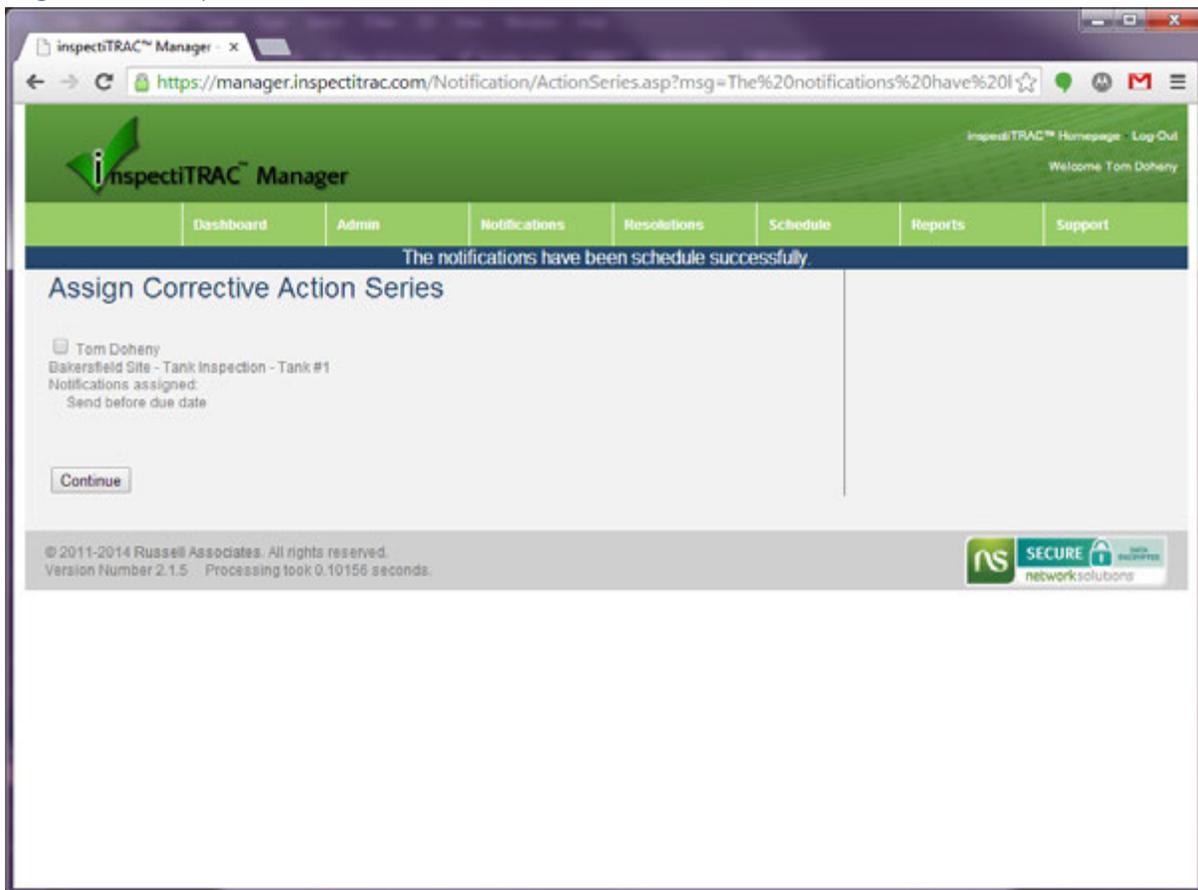
As you can see from the graphic above, a notification has been assigned to this Corrective Action.

My Assigned Actions
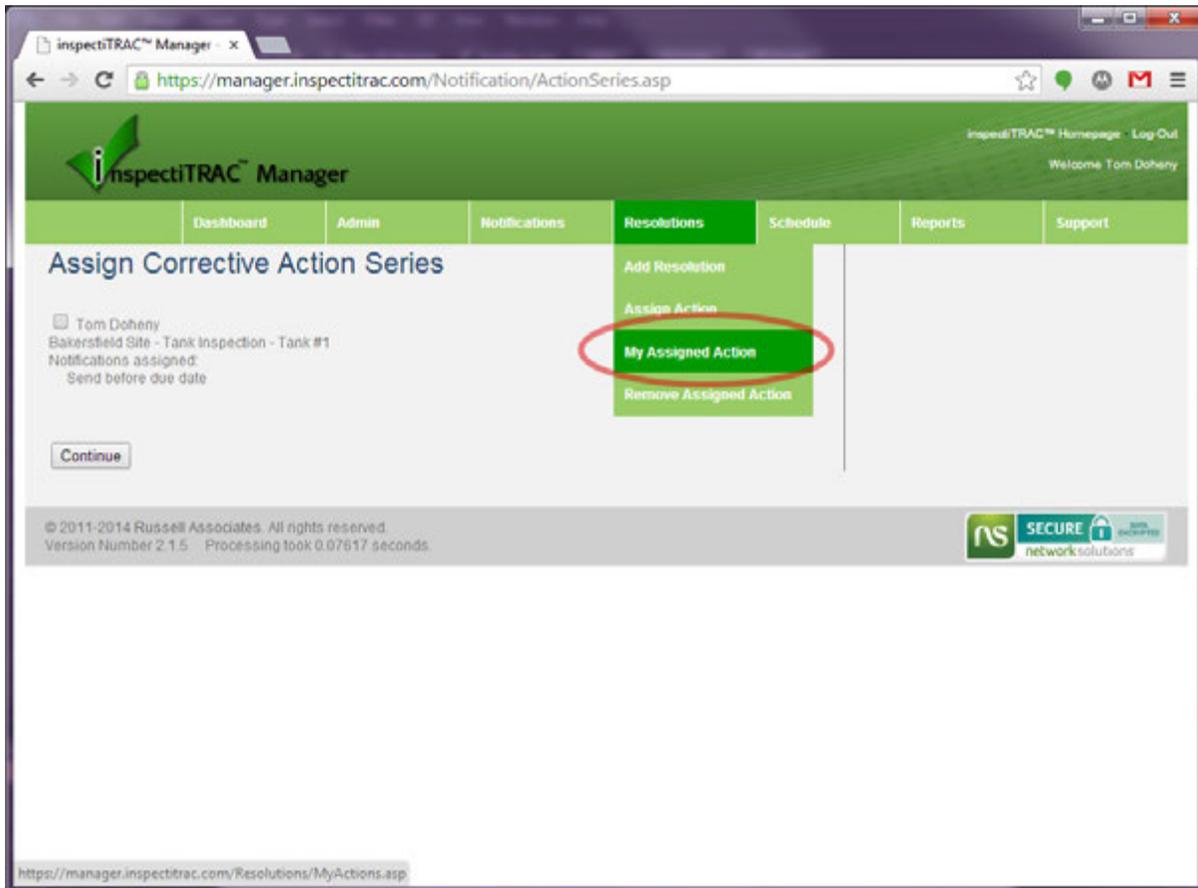
If you are assigned any Corrective Actions, you can quickly access those assignments by selecting "My Assigned Action" from the Resolutions menu.
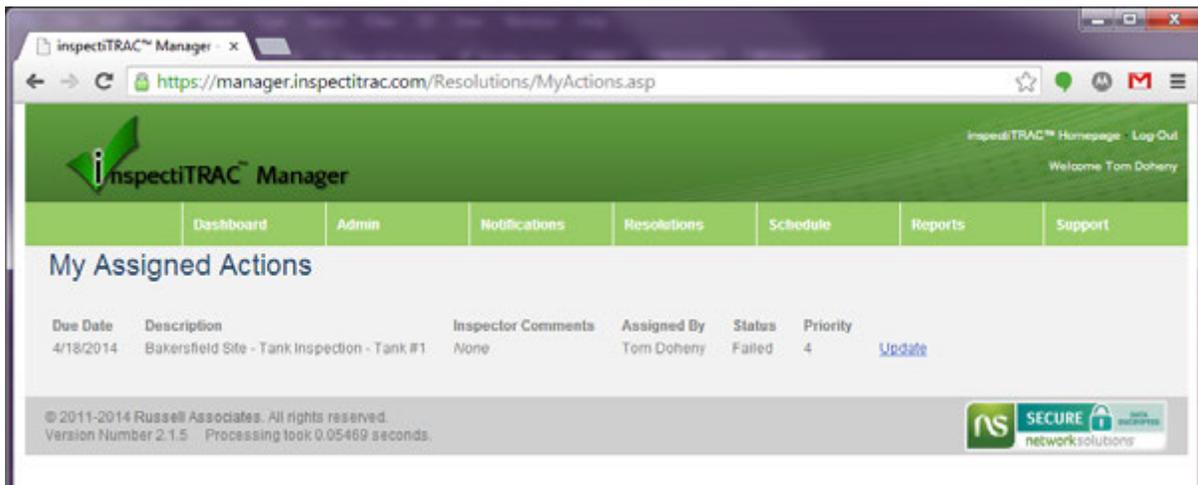
The My Assigned Actions screen will display all the actions assigned to you. If you have completed a resolution on an item, you can click the "Update" link to the right to add comments and/or mark this issue resolved.