

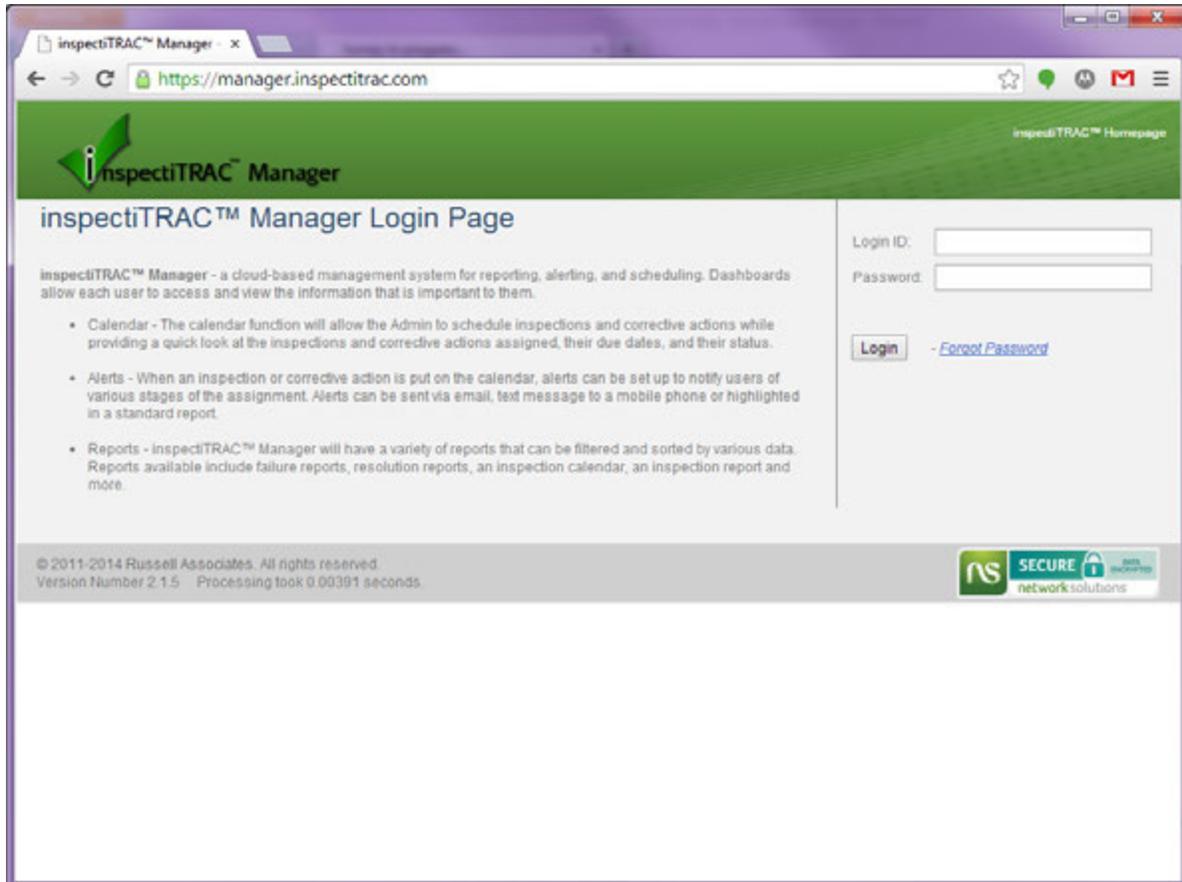
# inspectiTRAC™ Manager – Quick Lesson

## 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.

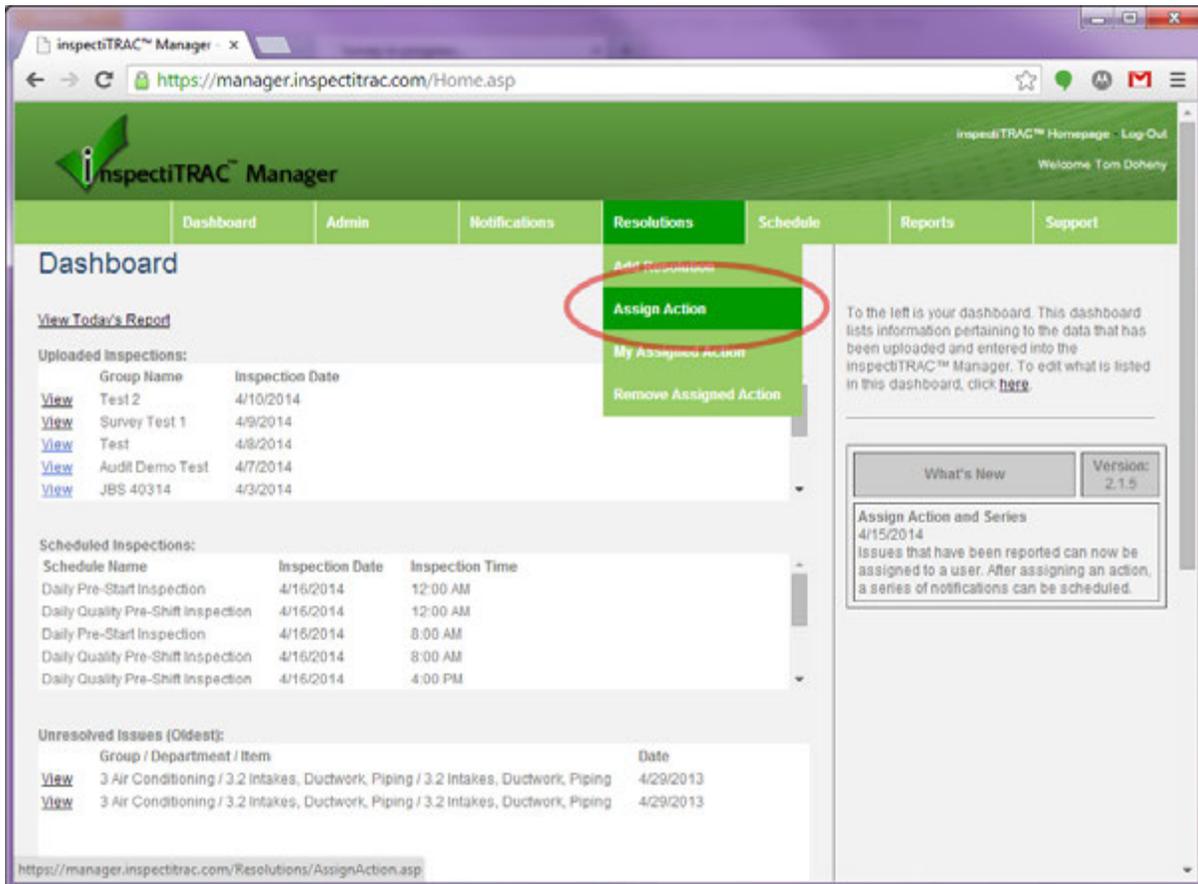
This Quick Lesson will present how to assign a corrective action to a user and then create an Action Series to notify that user of the assignment.

## Log into Manager



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

## Select Assign Action



The screenshot shows the InspectiTRAC Manager web application interface. The browser address bar displays <https://manager.inspectitrac.com/Home.asp>. The application header includes the logo and navigation tabs: Dashboard, Admin, Notifications, Resolutions, Schedule, Reports, and Support. The 'Resolutions' tab is active, and a dropdown menu is open, with 'Assign Action' highlighted in green and circled in red. Other menu items include 'Add Resolutions', 'My Assigned Action', and 'Remove Assigned Action'. The main content area is titled 'Dashboard' and contains sections for 'View Today's Report', 'Uploaded Inspections', 'Scheduled Inspections', and 'Unresolved Issues (Oldest)'. A 'What's New' section on the right side of the dashboard contains a message dated 4/15/2014 regarding assigning actions to users.

Group Name	Inspection Date
Test 2	4/10/2014
Survey Test 1	4/9/2014
Test	4/8/2014
Audit Demo Test	4/7/2014
JBS 40314	4/3/2014

Schedule Name	Inspection Date	Inspection Time
Daily Pre-Start Inspection	4/16/2014	12:00 AM
Daily Quality Pre-Shift Inspection	4/16/2014	12:00 AM
Daily Pre-Start Inspection	4/16/2014	8:00 AM
Daily Quality Pre-Shift Inspection	4/16/2014	8:00 AM
Daily Quality Pre-Shift Inspection	4/16/2014	4:00 PM

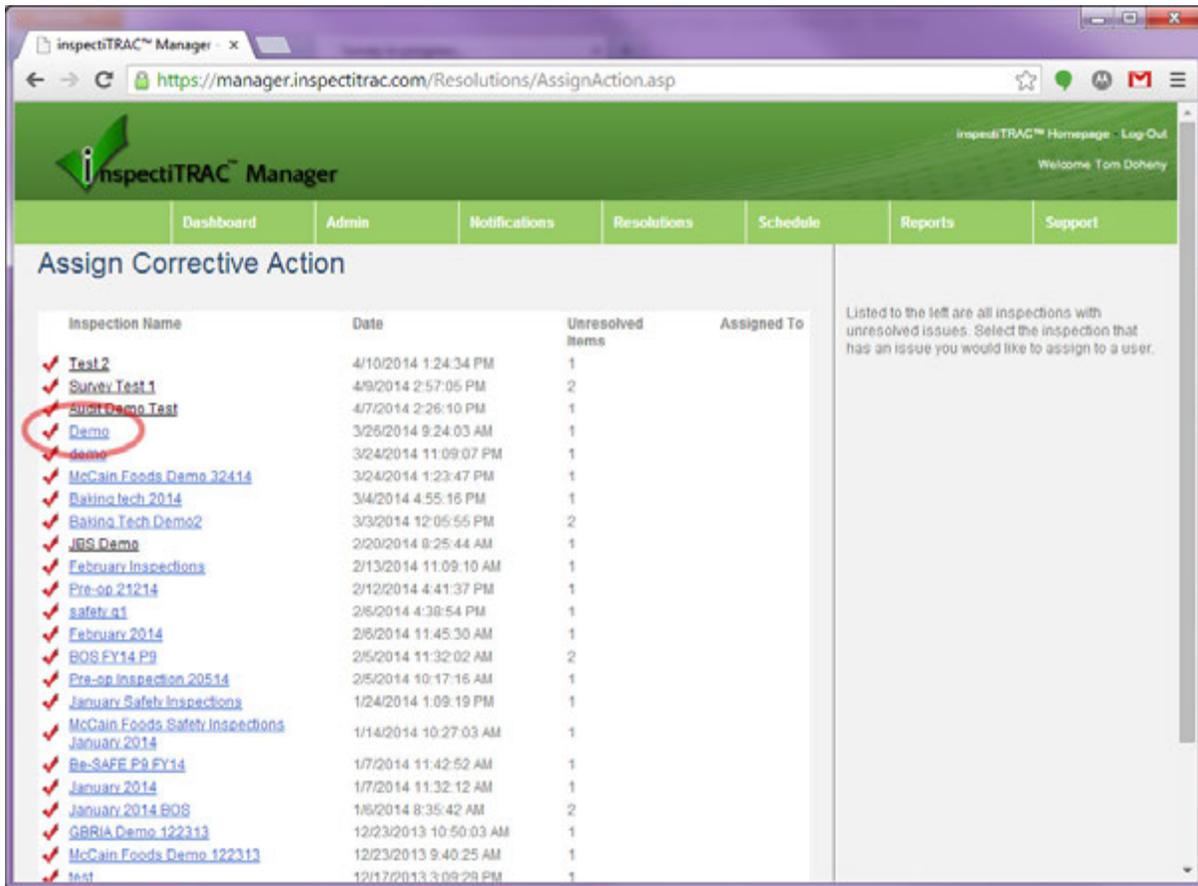
Group / Department / Item	Date
3 Air Conditioning / 3.2 Intakes, Ductwork, Piping / 3.2 Intakes, Ductwork, Piping	4/29/2013
3 Air Conditioning / 3.2 Intakes, Ductwork, Piping / 3.2 Intakes, Ductwork, Piping	4/29/2013

**What's New** | Version: 2.1.5

**Assign Action and Series**  
4/15/2014  
Issues that have been reported can now be assigned to a user. After assigning an action, a series of notifications can be scheduled.

From the Resolutions menu, select Assign Action.

Select the Inspection



inspectiTRAC™ Manager - x  
https://manager.inspectitrac.com/Resolutions/AssignAction.asp

InspectiTRAC™ Manager  
InspectiTRAC™ Homepage - Log Out  
Welcome Tom Doherty

Dashboard Admin Notifications Resolutions Schedule Reports Support

### Assign Corrective Action

Inspection Name	Date	Unresolved Items	Assigned To
✓ <a href="#">Test2</a>	4/10/2014 1:24:34 PM	1	
✓ <a href="#">Survey Test 1</a>	4/9/2014 2:57:05 PM	2	
✓ <a href="#">Subit Demo Test</a>	4/7/2014 2:26:10 PM	1	
✓ <a href="#">Demo</a>	3/26/2014 9:24:03 AM	1	
✓ <a href="#">demo</a>	3/24/2014 11:09:07 PM	1	
✓ <a href="#">McCain Foods Demo 32414</a>	3/24/2014 1:23:47 PM	1	
✓ <a href="#">Bakina Tech 2014</a>	3/4/2014 4:55:16 PM	1	
✓ <a href="#">Bakina Tech Demo2</a>	3/3/2014 12:05:55 PM	2	
✓ <a href="#">JRS Demo</a>	2/20/2014 8:25:44 AM	1	
✓ <a href="#">February Inspections</a>	2/13/2014 11:09:10 AM	1	
✓ <a href="#">Pre-op 21214</a>	2/12/2014 4:41:37 PM	1	
✓ <a href="#">safety a1</a>	2/6/2014 4:38:54 PM	1	
✓ <a href="#">February 2014</a>	2/6/2014 11:45:30 AM	1	
✓ <a href="#">BOS FY14 P9</a>	2/5/2014 11:32:02 AM	2	
✓ <a href="#">Pre-op Inspection 20514</a>	2/5/2014 10:17:16 AM	1	
✓ <a href="#">January Safety Inspections</a>	1/24/2014 1:09:19 PM	1	
✓ <a href="#">McCain Foods Safety Inspections January 2014</a>	1/14/2014 10:27:03 AM	1	
✓ <a href="#">Re-SAFE P9 FY14</a>	1/7/2014 11:42:52 AM	1	
✓ <a href="#">January 2014</a>	1/7/2014 11:32:12 AM	1	
✓ <a href="#">January 2014 BOS</a>	1/6/2014 8:35:42 AM	2	
✓ <a href="#">GBRIA Demo 122313</a>	12/23/2013 10:50:03 AM	1	
✓ <a href="#">McCain Foods Demo 122313</a>	12/23/2013 9:40:25 AM	1	
✓ <a href="#">test</a>	12/17/2013 3:09:29 PM	1	

Listed to the left are all inspections with unresolved issues. Select the inspection that has an issue you would like to assign to a user.

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

The screenshot shows the InspectiTRAC Manager web application. The browser address bar displays the URL: <https://manager.inspectitrac.com/Resolutions/AssignAction.asp?Step=ViewIssues&iD={82D2A2FC-9DE...}>. The page title is "Assign Corrective Action". The navigation menu includes: Dashboard, Admin, Notifications, Resolutions, Schedule, Reports, and Support. The main content area shows a list of unresolved issues for the selected inspection. The following questions were marked as false:

- Bakersfield Site - Tank Inspection - Tank #1  
Question: Check for water, cracks, or fire hazards.  
Comments: crack in tank

A "Continue" button is located below the list. To the right of the list, there is a note: "Listed to the left are all unresolved issues for the selected inspection. Check the box to select an issue you would like to assign to a user. Click the 'Continue' button when finished."

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Version Number 2.1.5 Processing took 0.11328 seconds.

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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 screenshot shows the 'Assign Corrective Action' screen in the inspectTRAC Manager. The browser address bar shows the URL: <https://manager.inspectitrac.com/Resolutions/AssignAction.asp?Step=SelectUsers>. The page title is 'Assign Corrective Action'. Below the title, it states: 'The following actions will be assigned to the selected user(s):' followed by '1) Bakersfield Site - Tank Inspection - Tank #1' and 'Question: Check for water, cracks, or fire hazards.' The screen is divided into several sections: 'Filter by Unit(s)' with a list of units including ACME, Acme Retrofit, Anvil Works, Information Technology, Maintenance, Production, and QA; 'Filter by Account Types' with radio buttons for All, Admin, Inspector, Corrective Action User, and Report Reader; 'Select user(s)' with a list of users including Doheny, Tom; Frank, Sarah; Inspector, ACME; Jones, Chelsey; Maintenance, ACME; Simyak, Dave; Supervisor, ACME; Tauer, Cole; Van Oort, Jerry; and Vice President, ACME; 'Due Date' set to 04/18/2014 with a calendar icon; 'Time' set to 9:00 AM; and 'Priority Level' with radio buttons for Low and High. A red arrow labeled '1' points to the 'Select user(s)' list. A red arrow labeled '2' points to the 'Due Date' field. A red arrow labeled '3' points to the 'Time' field. A red arrow labeled '4' points to the 'Priority Level' field. On the right side of the screen, there is instructional text: 'To assign the issues selected to a user, check the unit(s) the user is assigned to, then check their name in the right field. Next, select a due date and time when the issue must be resolved by. Last, select the priority level of this assigned action. A high priority means this issue should be taken care of immediately, while a low represents a minor issue. When completed, click the 'Assign Actions' button.'

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 screenshot shows the 'Assign Corrective Action' screen in the InspectiTRAC Manager. The page title is 'Assign Corrective Action' and it displays a table of inspections with columns for 'Inspection Name', 'Date', 'Unresolved Items', and 'Assigned To'. A red circle highlights the text 'Click here to add an action series.' and a red arrow points to the 'Assigned To' field for the 'Demo' inspection, which is populated with 'Tom Doheny'.

Inspection Name	Date	Unresolved Items	Assigned To
✓ Test2	4/10/2014 1:24:34 PM	1	
✓ Survey Test 1	4/9/2014 2:57:05 PM	2	
✓ Audit Demo Test	4/7/2014 2:26:10 PM	1	
✓ Demo	3/26/2014 9:24:03 AM	1	Tom Doheny
✓ demo	3/24/2014 11:09:07 PM	1	
✓ McCain Foods Demo 32414	3/24/2014 1:23:47 PM	1	
✓ Basins Tech 2014	3/4/2014 4:55:16 PM	1	
✓ Basins Tech Demo2	3/3/2014 12:05:55 PM	2	
✓ JRS Demo	2/20/2014 8:25:44 AM	1	
✓ February Inspections	2/13/2014 11:09:10 AM	1	
✓ Pre-op 21214	2/12/2014 4:41:37 PM	1	
✓ safety q1	2/6/2014 4:38:54 PM	1	
✓ February 2014	2/6/2014 11:45:30 AM	1	
✓ BOS FY14 P9	2/5/2014 11:32:02 AM	2	
✓ Pre-op Inspection 20514	2/5/2014 10:17:16 AM	1	
✓ January Safety Inspections	1/24/2014 1:09:19 PM	1	
✓ McCain Foods Safety Inspections January 2014	1/14/2014 10:27:03 AM	1	
✓ Bo Safety Inspections	1/7/2014 11:47:53 AM	1	

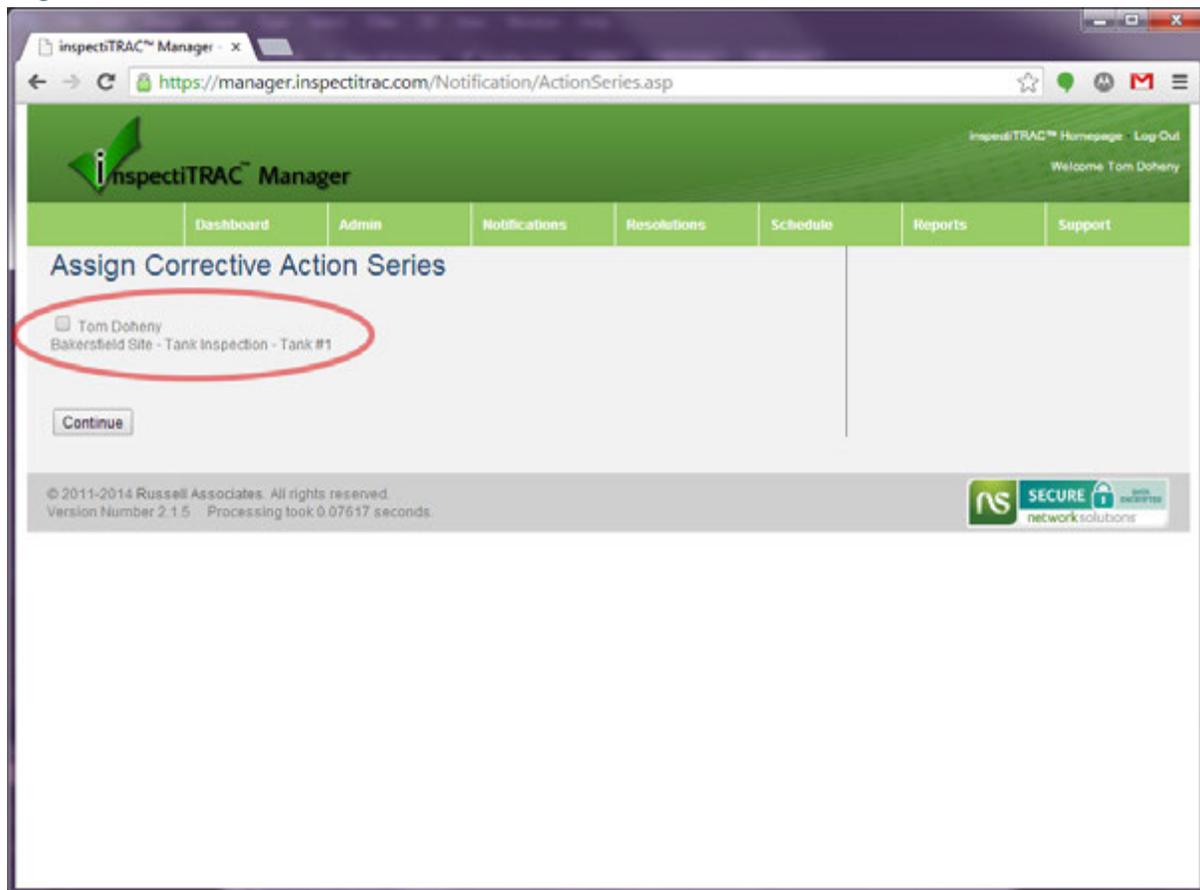
The system returns to the Assign Corrective Actions screen and is ready for you to assign another corrective action.

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

inspectiTRAC™ Manager - x  
https://manager.inspectitrac.com/Notification/ActionSeries.asp?Step=Notifications

InspectiTRAC™ Manager  
InspectiTRAC™ Homepage - Log Out  
Welcome Tom Doherty

Dashboard Admin Notifications Resolutions Schedule Reports Support

### Assign Corrective Action Series

STEP 1: - Type and Date of Notification

I would like to send a notification as a:

- notice that an action has been assigned
- reminder before resolution is due
- reminder after resolution is due
- notice that a corrective action was completed
- notice that a corrective action was NOT completed
- notice that a corrective action was attempted, but could not be resolved

This notification should be sent  days before due date.

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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

inspectiTRAC™ Manager - x

https://manager.inspectitrac.com/Notification/ActionSeries.asp?Step=Notifications

inspectiTRAC™ Manager

inspectiTRAC™ - Homepage - Log Out

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### Assign Corrective Action Series

STEP 2: - Select Notification Type

You have the option to send an SMS Text Message, an email, or both. To send a text message or email, check the box next to the desired option.

To send a text message, the user must have a cell phone number and their carrier listed. The user must also consent to having texts be sent to their phone.

An email address is required to send an email.

Note: The message will be sent to the person assigned this action. You also have the option of sending this notification to additional users to this notification on the next screen.

- Send SMS Text

- Send Email

Email Subject (max. 100 characters)

Email Text (max. 2500 characters)

Attach description of issue. (email only) **1**

Back Continue

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

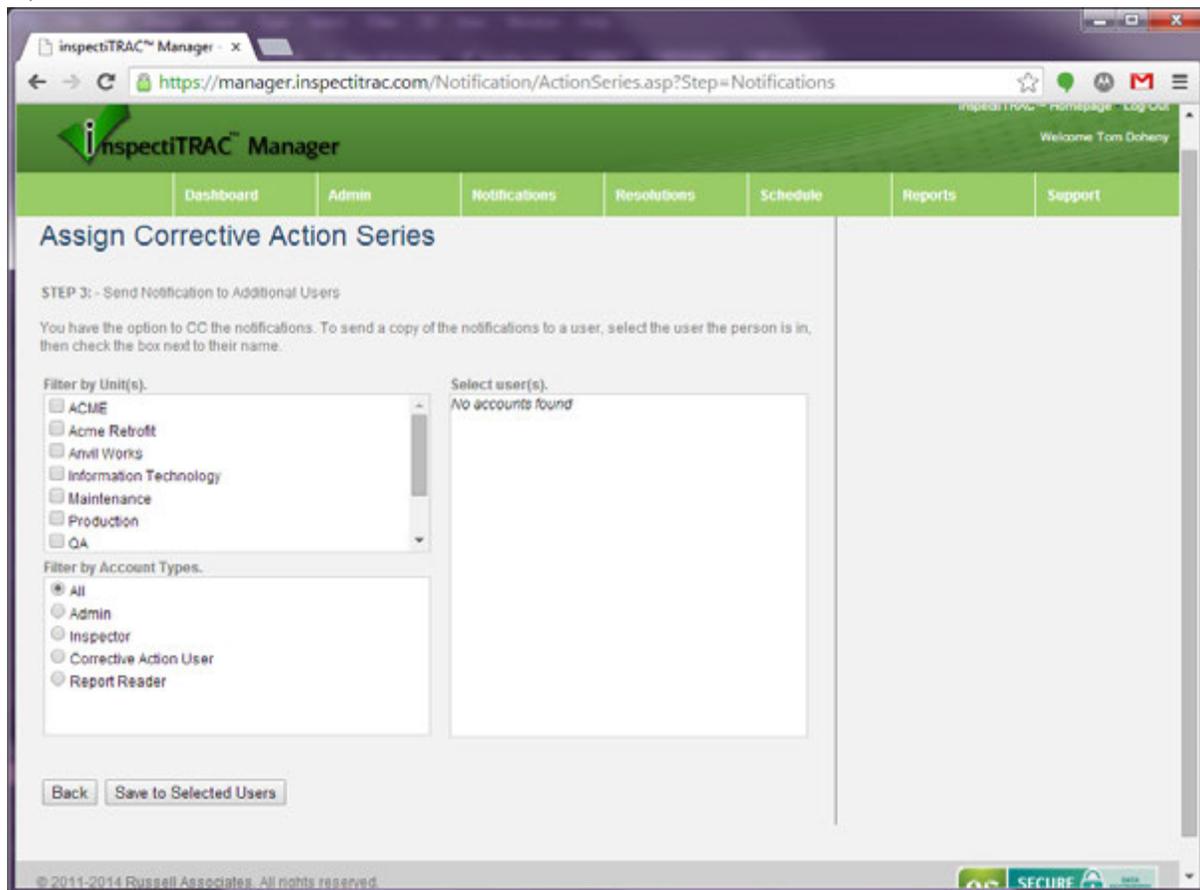
You can send an SMS Text Message or an Email to the recipient. To receive a text message, the recipient must have a cell phone number set up in the system and they must check the box in their profile that allows them to receive text messages. To receive emails, the recipient must have an email address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

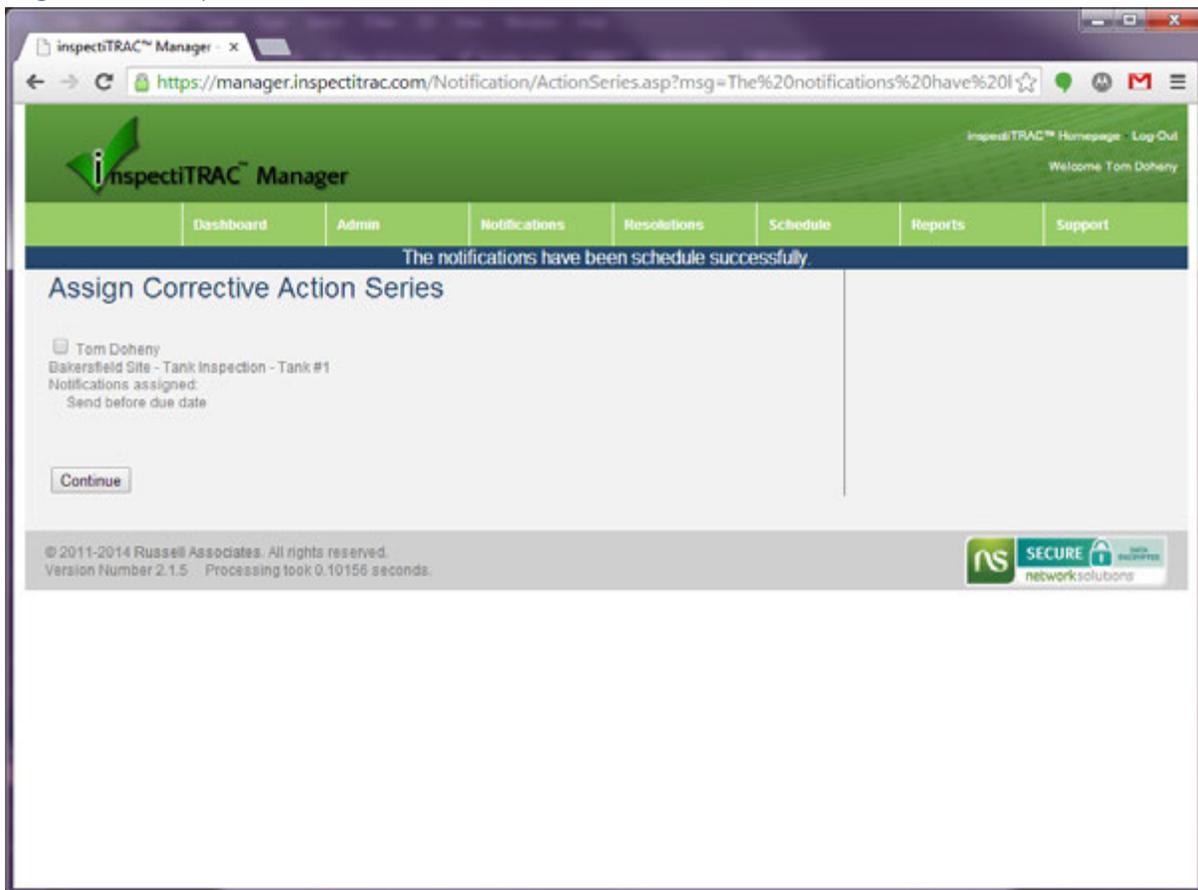
### Step 3 – Send Notification to Additional Users



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.

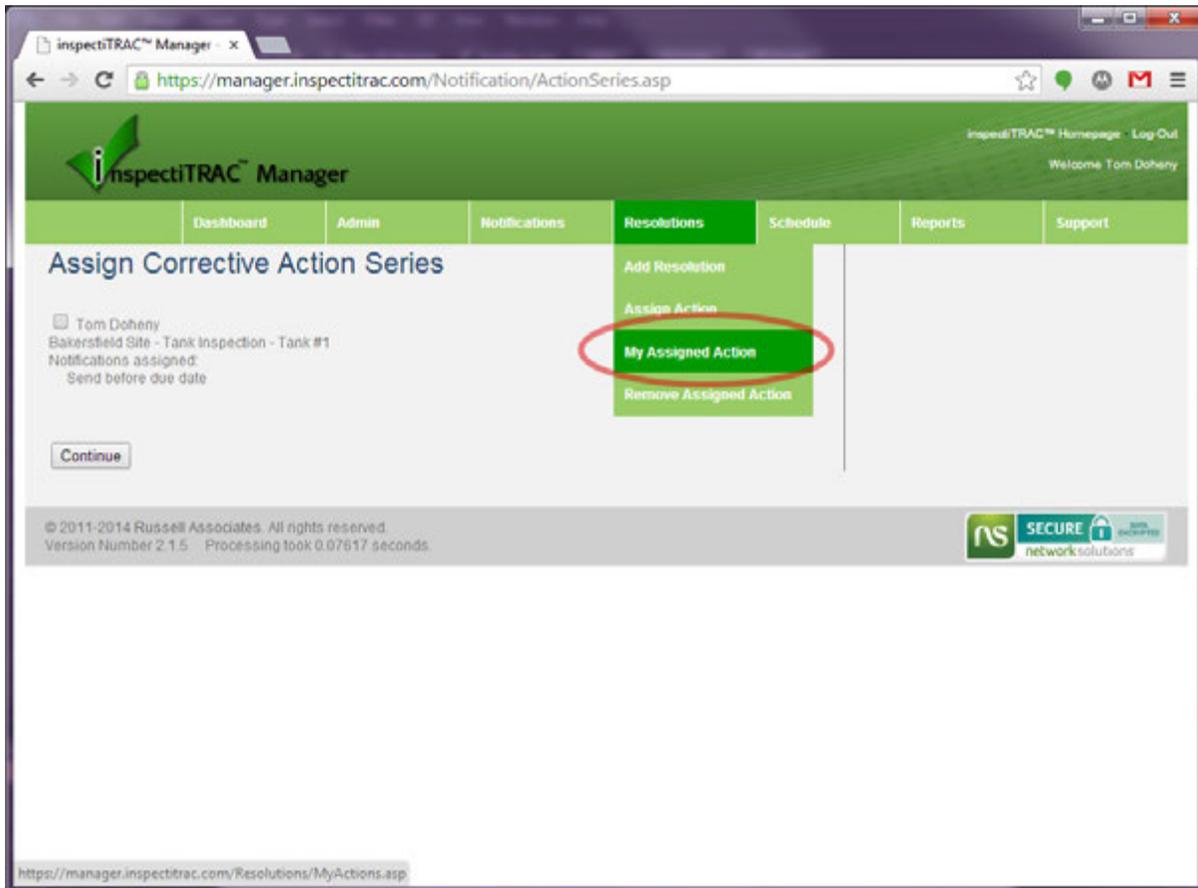
Click on the "Save to Selected Users" button to complete this Assign Corrective Action Series.

## Assignment Complete

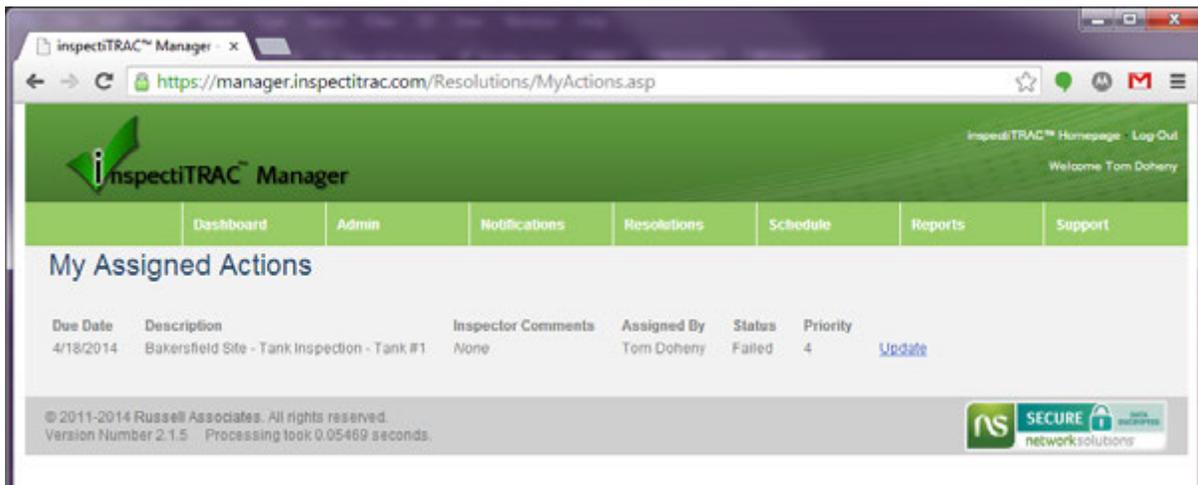


As you can see from the graphic above, a notification has been assigned to this Corrective Action.

## 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.