

Adding Responsible Parties to Existing and New Inspections

The Corrective Action Tracking system in Safety Inspection enables the system to send emails from the Safety Reports server to 'responsible parties,' who can then update action items assigned to them. This guide shows details about how to assign them to inspections.

Note to Administrators: Ensure only folks who will be involved in this process are named as Responsible Parties to prevent the recipients from mistakenly thinking the messages are Spam. All email messages from Safety Reports are legitimate emails.

Adding Responsible Parties to Inspections (Mobile App)

1. Choose the Inspection you want to edit from the app's 'Home' screen
2. When on the 'Inspect' tab, choose the 'Edit' button
3. Scroll to the bottom of the page, and expand the Responsible Parties drop-down menu
4. Place a 'check' beside the Responsible Parties you want to make available for items in this inspection a. If unable to locate a particular Responsible Party, use the 'search' feature
5. Choose first, 'Done' and then 'Accept'
6. To complete, choose 'Update'

Note: changes to inspection settings like Responsible Parties requires a 'Full' Inspector account and cannot be changed by Sub User accounts. If this function is not available, contact your account administrator.

Adding Responsible Parties to Inspections (Online Admin Account)

1. Login into the Admin Account
2. Click on Inspection Maintenance
3. Create a new inspection or, move to step '4'
4. If you have already created (unsubmitted) jobs that you'd like to add Responsible Parties to, find those inspections/jobs, choose 'Edit'
5. Highlight one (or multiple) Responsible Parties in the Available column, then choose the grey '>>' arrow button to move them to the 'Selected' column
6. Choose the green 'Update Inspection' button when finished

Note: changes are immediate on the web, but may require inspectors to run the 'Download Default Databases' function to be visible on the mobile app.

Adding Responsible Parties to Inspections (Web Inspection App)

1. Login to your User Account on the Web
2. Choose the blue link showing the title of the Inspection (Under Recent Inspections)
3. Choose 'Edit Inspection,' a hyper link in the top right corner
4. Highlight one (or multiple) Responsible Parties in the Available column, then choose the grey '>>' arrow button to move them to the 'Selected' column
5. Choose the grey 'Update Job' button at the bottom of the screen

For more information, contact:

Safety Reports at support@safety-reports.com or (402) 403-6575 option '2'