



## User guide: Create a Checklist

1. Manage nonconformities!.....	2
2. How to find the nonconformities.....	2
2.1 Find nonconformities via the result menu.....	2
2.2 Find actions via the 'non conformities' menu.....	5
3. Action management in general .....	8
3.1 Assign action takers.....	8
3.2 The action taker .....	11
3.3 Print your non conformity report.....	13
3.4 Export to Excel.....	14
4. User rights .....	14

## 1. Manage nonconformities!

When you use the question type OK/NOK?NA in your checklist, you can use the nonconformity module.

At all inspection points that are answered with 'Not OK', a nonconformity report is automatically generated. In this manual we explain how to manage nonconformities.

## 2. How to find the nonconformities

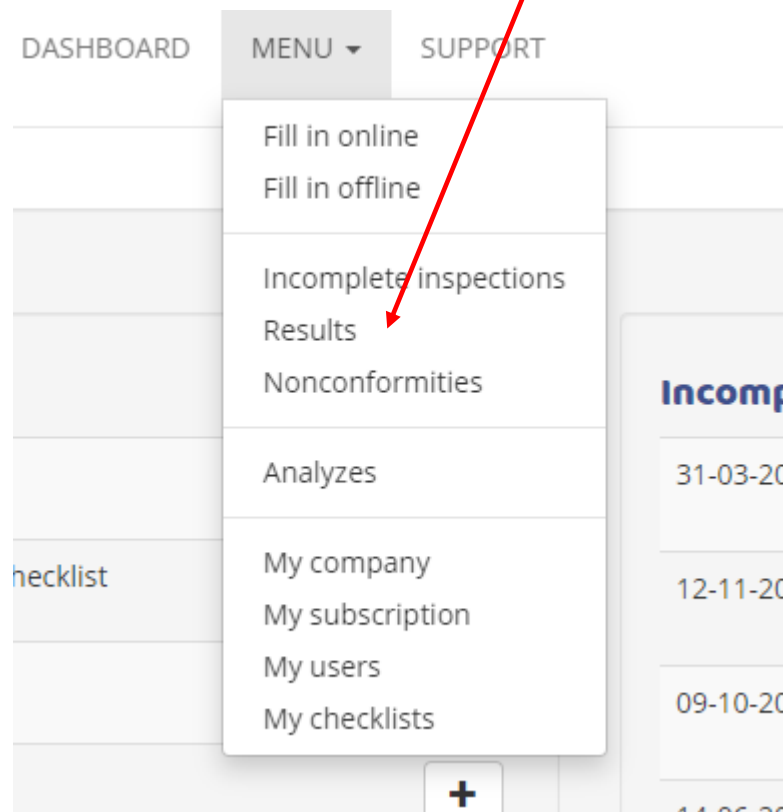
After an inspection result upload to the database, the inspector will receive the inspection report in pdf-format by email.

The nonconformity reports are generated and can be found in two ways.

### 2.1 Find nonconformities via the result menu

Login with your email and password on the website of [www.easytoinspect.com](http://www.easytoinspect.com).

Select the menu option in the upper bar and press 'Results'



Then select your inspection report.

Now you can either click on the red label which indicates the number of nonconformities that resulted from this inspection.

You can also click the action button and select 'go to non conformances'.

Both methods will guide you to the nonconformities belonging to this specific report.

**Results** total number 104

Search Export results

1 2 3 4 5 > >>

State	Inspector	Name	Reference	Statistics
Action	04-05-2019 Samuel Loscalzo	Workplace inspection construction	2348765435	0 9 3 0 2
Action	04-05-2019 Samuel Loscalzo	Behaviour Based Safety Checklist	12345678	0 13 5 0 5
Action	28-04-2019 Samuel Loscalzo	Workplace inspection construction	56264	0 11 1 0 2
Action	28-04-2019 Samuel Loscalzo	Behaviour Based Safety Checklist	123445	0 14 4 0 5
Action	08-04-2019 Samuel Loscalzo	Workplace inspection construction	6675436	0 11 2 0 1
Action	08-04-2019 Samuel Loscalzo	Behaviour Based Safety Checklist	8874321	0 14 8 0 1
Action	31-03-2019 Samuel Loscalzo	Workplace inspection construction		15 0 0 0 0
Action	31-03-2019 Samuel Loscalzo	Behaviour Based Safety Checklist	37281	0 16 4 0 3
Action		Workplace inspection construction	42341	0 9 2 0 3
Action		Behaviour Based Safety Checklist	721637681432	0 14 5 0 4
Action		Workplace inspection construction	463	0 11 2 0 1
Action		Behaviour Based Safety Checklist	123	0 22 1 0 0
Action		Workplace inspection construction	6	0 12 2 0 0

- Report (low resolution)
- Report (high resolution)
- Export (data)
- Export (complete)
- Email
- Edit
- Delete
- Go to non conformances
- Report nonconformities (PDF)
- Export nonconformities (XLS)



An overview with the specific nonconformity reports of this inspection will be generated.

dashboard / management of non-conformities Help me

## Nonconformity management total number 4

Action selection ▾

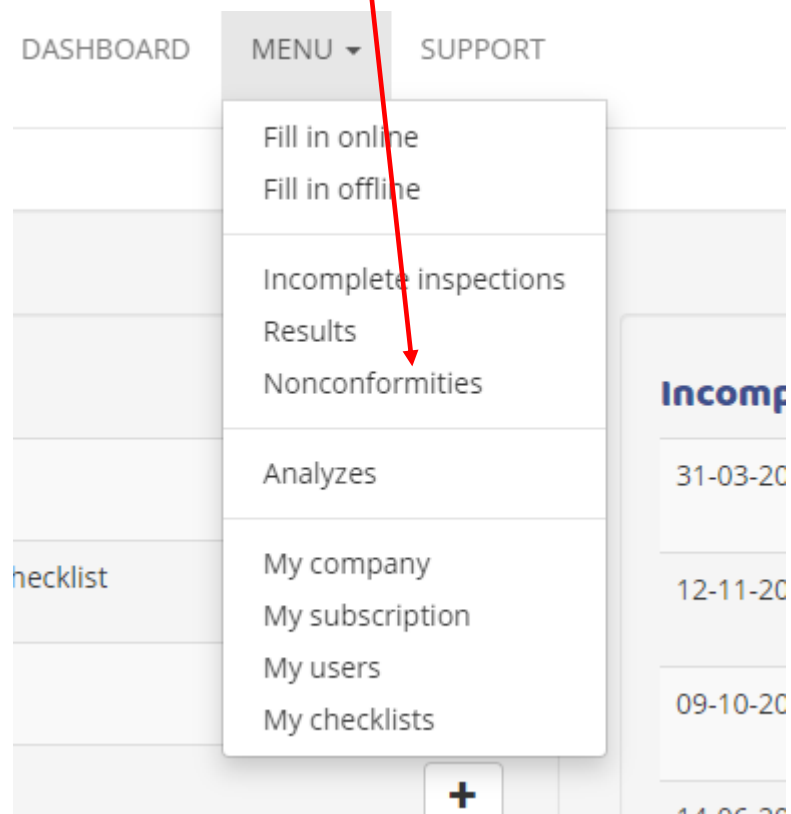
	Inspector / Name checklist	Reference	Action taker / email	Overview dates
<span>Action ▾</span>	31-03-2019 Samuel Loscalzo <i>Behaviour Based Safety Checklist</i>	37281		
	<b>Checklist question</b> safe working speed <i>Work is done with haste</i> <b>Cause</b> Man: insufficient knowledge			
<span>Action ▾</span>	31-03-2019 Samuel Loscalzo <i>Behaviour Based Safety Checklist</i>	37281		
	<b>Checklist question</b> correct use of PPE  <b>Cause</b> Means: incorrect use			
<span>Action ▾</span>	31-03-2019 Samuel Loscalzo <i>Behaviour Based Safety Checklist</i>	37281		
	<b>Checklist question</b> attention to safety of third parties  <b>Cause</b> Means: insufficient maintenance			
<span>Action ▾</span>	31-03-2019 Samuel Loscalzo <i>Behaviour Based Safety Checklist</i>	37281		
	<b>Checklist question</b> escape routes kept free  <b>Cause</b> Man: insufficient instruction			



## 2.2 Find actions via the 'non conformities' menu

Login with your email and password on the website of [www.easytoinspect.com](http://www.easytoinspect.com).

Select the menu option in the upper bar and press 'Nonconformities'





An overview is generated with all nonconformity reports of all inspections.

dashboard / management of non-conformities Help me

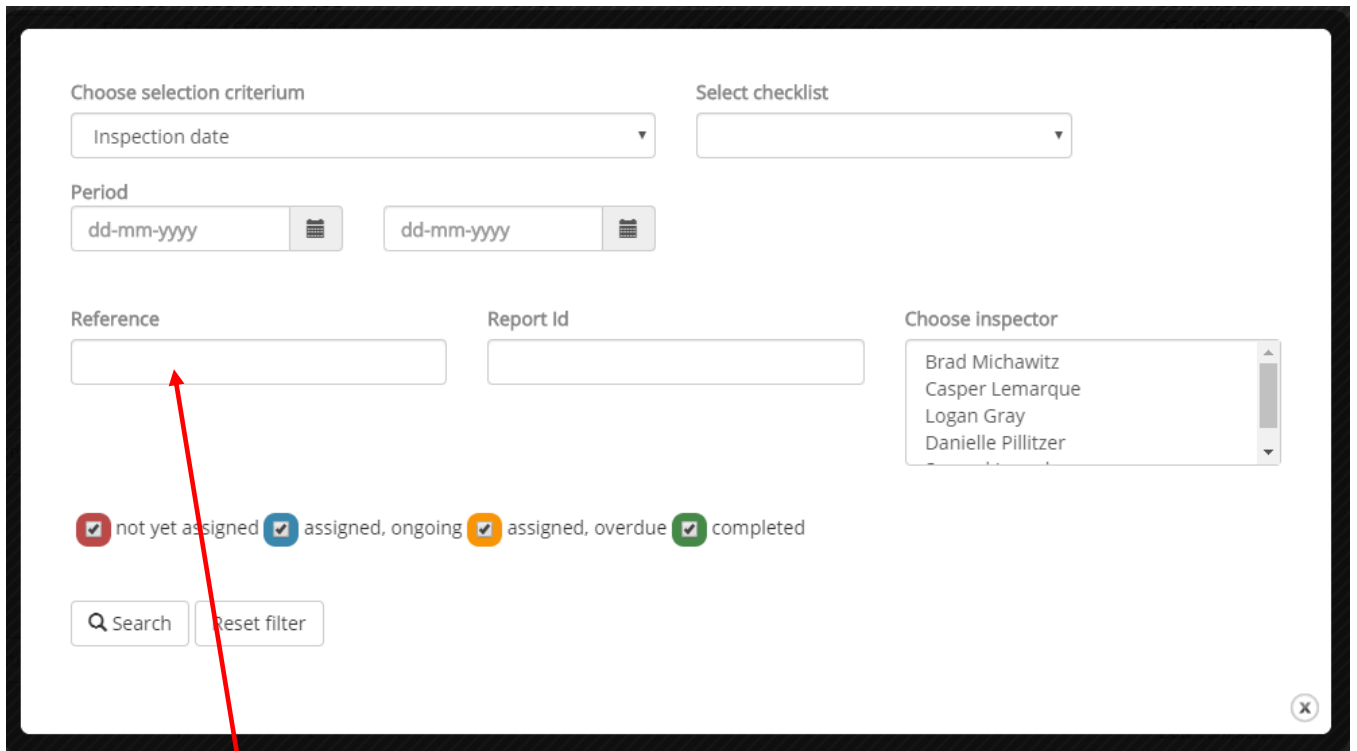
## Nonconformity management total number 232

Search Action selection 1 2 3 4 5 > >>

	Inspector / Name checklist	Reference	Action taker / email	Overview dates
<span>Action</span>	20-05-2017 Robert Lemarque <i>Behaviour Based Safety Checklist</i>	DT65P	Robert <i>robert@easytoinspect.com</i>	<i>Date request:</i> 22-08-2017 <i>Deadline:</i> 23-08-2017 <i>Date completed:</i> 22-08-2017
	<b>Checklist question</b> state of PPE <b>Cause Means:</b> excessive wear and tear			
<span>Action</span>	10-03-2017 Brad Michawitz <i>Behaviour Based Safety Checklist</i>			<i>Date request:</i>  <i>Deadline:</i>  <i>Date completed:</i> 30-09-2016
	<b>Checklist question</b> state of PPE <i>The inspection date is not visible on the fall arrestor</i> <b>Cause Means:</b> insufficient maintenance			
<span>Action</span>	14-03-2017 Brad Michawitz <i>Behaviour Based Safety Checklist</i>	CX98G		<i>Date request:</i>  <i>Deadline:</i>  <i>Date completed:</i> 30-09-2016
	<b>Checklist question</b> safe working attitude <i>Body position is torqued and will lead to serious back issues after a couple of years. Ergonomics training needs to be organised.</i> <b>Cause Man:</b> insufficient instruction			
<span>Action</span>	14-03-2017 Brad Michawitz <i>Behaviour Based Safety Checklist</i>	CX98G		<i>Date request:</i>  <i>Deadline:</i>  <i>Date completed:</i> 30-09-2016
	<b>Checklist question</b> adhering to work permits <b>Cause Man:</b> procedures not followed			
	14-03-2017 Brad Michawitz	CX98G		<i>Date request:</i>

Find your inspection via the search function

Via 'search' you can select a report reference, a time period, a type of inspection, the status of nonconformities, the inspector etc.



When you fill in 37281 as reference number, you will find all NC's belonging to inspection result with reference number 37281.

dashboard / management of non-conformities Help me

## Nonconformity management total number 4

Search Action selection

	Inspector / Name checklist	Reference	Action taker / email	Overview dates
<span>Action</span>	31-03-2019 Samuel Loscalzo <i>Behaviour Based Safety Checklist</i>	37281		
	Checklist question safe working speed <i>Work is done with haste</i> Cause Man: insufficient knowledge			
<span>Action</span>	31-03-2019 Samuel Loscalzo <i>Behaviour Based Safety Checklist</i>	37281		
	Checklist question correct use of PPE Cause Means: Incorrect use			
<span>Action</span>	31-03-2019 Samuel Loscalzo <i>Behaviour Based Safety Checklist</i>	37281		
	Checklist question attention to safety of third parties Cause Means: insufficient maintenance			
<span>Action</span>	31-03-2019 Samuel Loscalzo <i>Behaviour Based Safety Checklist</i>	37281		
	Checklist question escape routes kept free Cause Man: insufficient instruction			

### 3. Action management in general

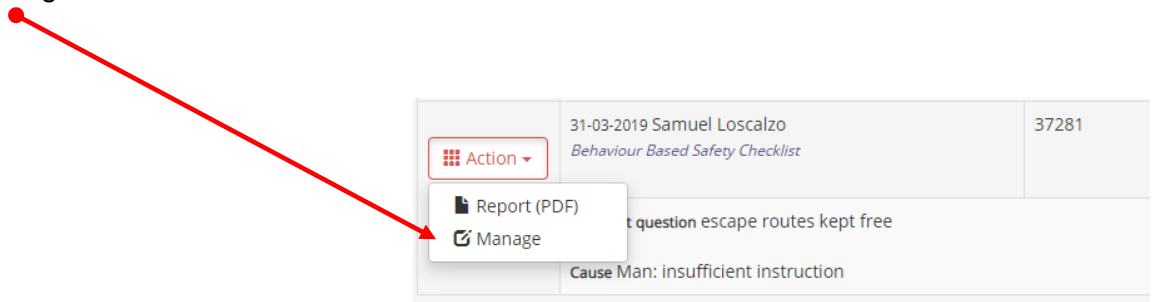
Actions can be assigned by any inspector that has user rights (see chapter 4)

Actions can be dealt with by anyone. Also non easytoinspect-users. Anyone with a computer and an email address can complete actions.

After an action is assigned to an action taker, the action taker will receive an email with a hyper link. The action taker can complete the action and close the action.

#### 3.1 Assign action takers

When you have selected the nonconformity you want to manage, click the action button and select manage.



A screen will pop up that can be completed with all relevant data:





### Treat nonconformances Behaviour Based Safety Checklist

During the below mentioned inspection a nonconformance is observed. You can update the status of the action and enter comments in the field "Remarks". Fill in the form, your changes are saved immediately. You can also assign the action to another person. Please fill out the fields "Name action owner" and "Email action owner". Then click the button "Send".

Concerns the following checklist

Date	User	Reference
31-03-2019	Samuel Loscalzo	37281

attention to safety of third parties  
Cause : Means: insufficient maintenance

Requested action

To be completed before

Name action owner

Email address action taker

Action taken

Action completed on

Select to assign nonconformity

### Treat nonconformances Behaviour Based Safety Checklist

During the below mentioned inspection a nonconformance is observed. You can update the status of the action and enter comments in the field "Remarks". Fill in the form, your changes are saved immediately. You can also assign the action to another person. Please fill out the fields "Name action owner" and "Email action owner". Then click the button "Send".

Concerns the following checklist

Date	User	Reference
31-03-2019	Samuel Loscalzo	37281

attention to safety of third parties  
Cause : Means: insufficient maintenance

Requested action

To be completed before

Name action owner

Email address action taker

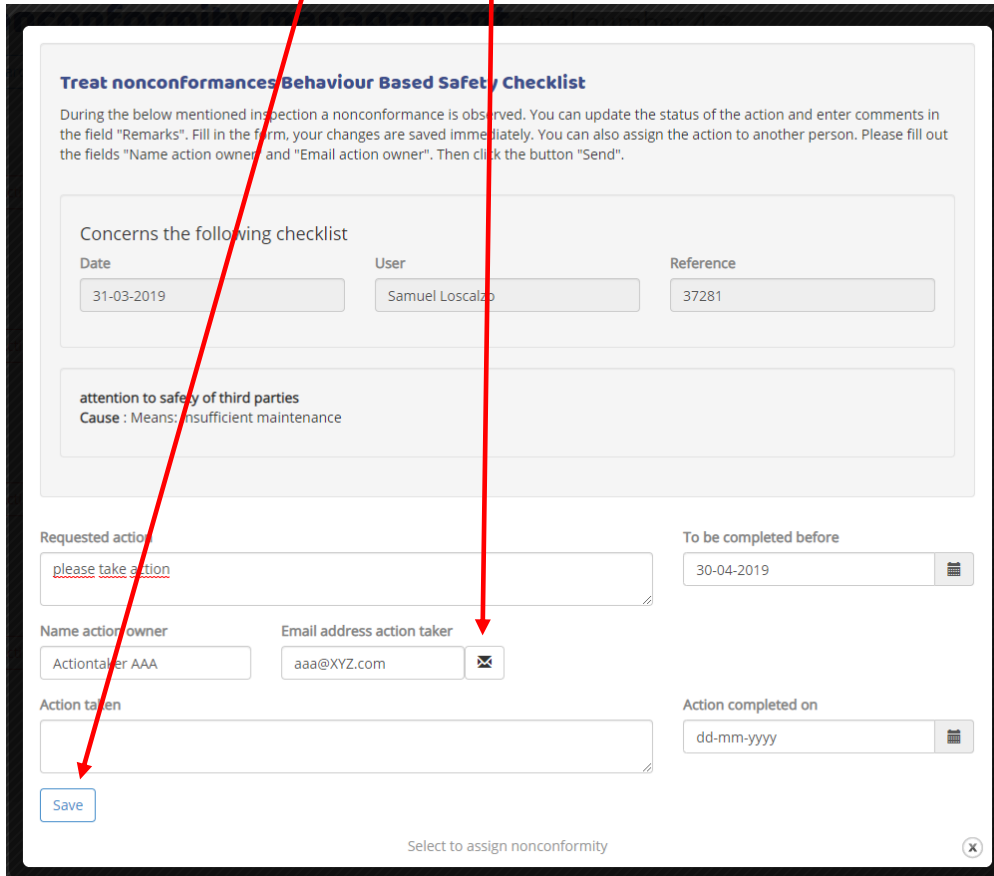
Action taken

Action completed on

Select to assign nonconformity

No two steps have to be taken to conclude the assigning process.

- 1) You have to click on the envelope to send the email
- 2) You have to save



**Treat nonconformances Behaviour Based Safety Checklist**

During the below mentioned inspection a nonconformance is observed. You can update the status of the action and enter comments in the field "Remarks". Fill in the form, your changes are saved immediately. You can also assign the action to another person. Please fill out the fields "Name action owner" and "Email action owner". Then click the button "Send".

Concerns the following checklist

Date: 31-03-2019    User: Samuel Loscalzo    Reference: 37281

attention to safety of third parties  
Cause : Means: insufficient maintenance

Requested action: please take action    To be completed before: 30-04-2019


Name action owner: Actiontaker AAA    Email address action taker: aaa@XYZ.com [Send icon]

Action taken:    Action completed on: dd-mm-yyyy

[Save]

Select to assign nonconformity

In the overview of your actions you now see that the action is assigned and the date of sending the email as well as the requested deadline are displayed.


 Action	31-03-2019 Samuel Loscalzo <i>Behaviour Based Safety Checklist</i>	37281	Actiontaker AAA aaa@XYZ.com	<i>Date request:</i> 21-06-2019
	Checklist question attention to safety of third parties Cause Means: insufficient maintenance			<i>Deadline:</i> 30-04-2019 <i>Date completed:</i>

### 3.2 The action taker

The action taker will receive an invitation to take action by email.

- ✔ The email is sent from an email address of Easy to Inspect: [no-reply@easytoinspect.com](mailto:no-reply@easytoinspect.com).
- ✔ The email is sent on behalf of the inspector.
- ✔ The email contains an overview of the inspection question details
- ✔ The email contains an overview of the action request

In the action report's email, a hyperlink is included. Once the action taker clicks on the hyperlink, the action report will open.



**N**

no-reply@easytoinspect.com  
Request for action on nonconformance

Aan Support Easy to Inspect

**Dear Actiontaker AAA,**

During the below mentioned inspection a nonconformance was observed. You are requested to take appropriate action. The nonconformance was detected concerning following checkpoint:

Checklist question	attention to safety of third parties
Explanation	
Cause	Means: insufficient maintenance
Comments	
Requested action	please take action
To be completed before	30-04-2019
Name action taker	Actiontaker AAA
Email action taker	<a href="mailto:support@easytoinspect.com">support@easytoinspect.com</a>

If you have any questions about this nonconformance, please contact Samuel Loscalzo from Steel Assembly Corp.

If you have taken the appropriate action, [please click here to settle this action in the website.](#)

The nonconformance concerns the following inspection:

Id	5ca0af36917f4f000101b99e
Date	31-03-2019
Our reference	37281
Inspector	Samuel Loscalzo
Name	Behaviour Based Safety Checklist
Country	United States of America
Region	North East
Supervisor	Tim Marks
Customer	S.L.O. Construction Inc.
Project Number	550302
Activity	Iron Works
Observed employee	Tom Hanks
Work carried out during observation	Iron Working

Kind regards,

Samuel Loscalzo

Steel Assembly Corp

The action taker can include the actions taken and finish the action by filling in the completion date and saving the action report.

### Remarks nonconformance settlement Behaviour Based Safety Checklist

#### Settle nonconformances

During the below mentioned inspection a nonconformance was observed. You are requested to take appropriate action. When the action is completed, you can update the status of the action and enter comments in the field "Remarks". Then click the button "Save".

Concerns the following checklist


Date	User	Reference
31-03-2019	Samuel Loscalzo	37281

**attention to safety of third parties**  
Cause : Means: insufficient maintenance

Requested action	To be completed before
please take action	30-04-2019
Name action owner	Email address action taker
Actiontaker AAA	support@easytoinspect.
Action taken	Action completed on
	dd-mm-yyyy

Save

Once you open the nonconformity overview again, you will see the completion date included. The action button turns green to indicated completion.


	31-03-2019 Samuel Loscalzo <i>Behaviour Based Safety Checklist</i>	37281	Actiontaker AAA <i>support@easytoinspect.com</i>	<i>Date request:</i> 21-06-2019
	Checklist question attention to safety of third parties			<i>Deadline:</i> 30-04-2019
	Cause Means: insufficient maintenance			<i>Date completed:</i> 30-07-2019



### 3.3 Print your non conformity report

Via the action button, you can generate a pdf-nonconformity report.

## Non Conformance report Behaviour Based Safety Checklist



<b>Date</b>	:	31-03-2019
<b>User</b>	:	Samuel Loscalzo
<b>Reference</b>	:	37281
<b>Country</b>	:	United States of America
<b>Region</b>	:	North East
<b>Supervisor</b>	:	Tim Marks
<b>Customer</b>	:	S.L.O. Construction Inc.
<b>Project Number</b>	:	550302
<b>Activity</b>	:	Iron Works
<b>Observed employee</b>	:	Tom Hanks
<b>Work carried out during observation</b>	:	Iron Working
<b>ID</b>	:	5ca0af36917f4f000101b99e

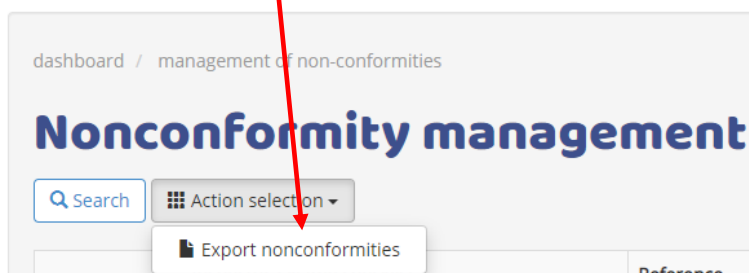
100	behavior aspect	
115	attention to safety of third parties	Not OK
	<i>Cause</i>	<i>Means: insufficient maintenance</i>
	<i>Name action taker</i>	<i>Actiontaker AAA (support@easytoinspect.com)</i>
	<i>Date sent</i>	<i>21-06-2019 12:36</i>
	<i>Requested action</i>	<i>please take action</i>
	<i>To be completed before</i>	<i>30-04-2019</i>
	<i>Action completed on</i>	<i>30-07-2019</i>
	<i>Action taken</i>	<i>asdfasdf</i>

### 3.4 Export to Excel

Easy to Inspect does not yet include the option to support 'bulk' completion of nonconformities.

You can however always export an overview to excel, use Excel's filter function and select the nonconformities that you would like to send to action takers.

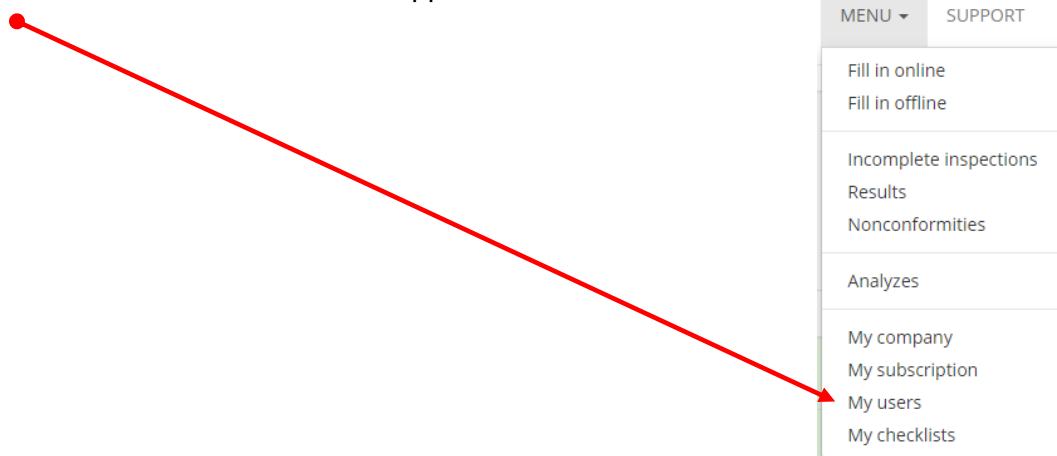
Click on 'action selection' in the 'nonconformity' management menu and select export.



## 4. User rights

You can attribute rights to assign and manage nonconformities to your users.

Select 'My users' in the main menu in the upper bar of the website.





Then click on the action button of a user and choose 'edit'

### My users

You are using 4 of the maximum number of 5 users.

Name	E-mail	Your alternate E-mail address (receiver)	Number of results	Created at	
Brad Michawitz *	brad@easytoinspect.com	brad@easytoinspect.com test@easytoinspect.com	50	28-02-2013	Action ▾
Casper Lemarque *	cl@easytoinspect.com	cl@easytoinspect.com	34	28-02-2013	Action ▾
Logan Gray	logan@easytoinspect.com	logan@easytoinspect.com	6	04-09-2014	Action ▾
Danielle Pillitzer	danielle@easytoinspect.com	danielle@easytoinspect.com	0	17-11-2015	Action ▾
Samuel Loscalzo	sl@easytoinspect.com	SL@easytoinspect.com	14	04-09-2014	<a href="#">Edit</a> <a href="#">Assign checklists</a> <a href="#">Enable</a>

\* This user has administrator rights

You can now select the user rights that you would like to enable / disable.

Regarding the nonconformance management 2 user right settings are relevant.

- ✓ The user can manage own non conformities, which means the nonconformances of inspections he/she carried out him/herself.
- ✓ The user can manage all nonconformities, which means he/she is also allowed to manage nonconformances of other inspectors.

#### User rights

<b>Manage account</b>		
Accountmanagement	Manage account and company information, create users, change and delete	<input type="checkbox"/> No
Use hidden checklists in the application	Use hidden checklists	<input type="checkbox"/> No
<b>Own checklists</b>		
Own checklists	Create en manage own checklists	<input type="checkbox"/> No
Own filters	Create and manage own filters	<input type="checkbox"/> No
Own cause codes	Create and manage own cause codes	<input type="checkbox"/> No
<b>Check</b>		
Inspect	Inspect with App and website	<input checked="" type="checkbox"/> Yes
Manage own non conformances	Manage non conformances resulting from own inspections	<input checked="" type="checkbox"/> Yes
Manage own reports	Manage reports of own inspections	<input checked="" type="checkbox"/> Yes
Manage inspection results	Manage inspection results of other users	<input type="checkbox"/> No
Manage all non conformances	Manage non conformances resulting from inspections of all users	<input type="checkbox"/> No
Manage reports of all users	Manage reports of inspections of all users	<input checked="" type="checkbox"/> Yes
<b>Analyse</b>		
Analyse own inspection results	Create and manage analyses of own inspections	<input checked="" type="checkbox"/> Yes
Analyse inspections of all users	Create and manage analyses of inspection results of all users	<input type="checkbox"/> No

Save



Save you settings when you are done.