




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1. Think before your start!

Don't start with the idea that you just want to carry out an inspection. Place yourself in the position of the management. What should be the outcome of the inspections?

Just the evidence that an inspection was carried out? Or more?

Of course, more... Management needs information to decide and act upon. So, if you start creating your own checklist, think about the level of detail you would like to get in your analyses. Use the filters to get there. It's easy!

2. General explanation of how a checklist is built up

A checklist is built up out of the following segments:

1) Introduction

The introduction contains preliminary questions and information about the inspection.

- ✔ The date of the inspection will be attached automatically to every inspection that will be carried out. The date field is always included in a checklist. When creating you don't need to put in a date selection field, since it will always show when using the App.
- ✔ The name of the inspector. The name of the inspector is automatically included in the inspection report. You don't see it in the App, but it will always be shown in the report. And if you select to do so, detailed background information about the inspector (such as competence) and his/her signature, will be included in the closing section of the inspection report. So, don't include a question or filter with 'inspector' in the checklist.
- ✔ Filters. Filters are used to create the questions of which the answers are predefined. The user can only choose from a scroll down menu and select the right value. For instance, a project number, a site, a customer or an activity. The filters are used to create more detailed analyses. And filter-values (the ones of which an inspector can choose), can always be modified / updated. Even when the checklist is taken into use already.
- ✔ Questions. You can select multiple types of questions. The questions in this section are for general purposes only. So don't put actual inspection points in this section.

2) Questions

This part of your checklist contains the actual set of inspection points. You can create sections (specific clusters of questions) and multiple types of questions/inspection points.

3) Closing

The closing part of the checklist is meant to include conclusive questions and offers an option to have the inspection report approved by the representative.



3. Types of question, options in use

3.1 Questions types and examples how to use

Easy to Inspect offers multiple types of question to be used. Be aware that for now, only the OK/NOK/N.A. type of question will be included in the analysis of the reports.

OK/NOK/N.A. questions

The OK/NOK/N.A. question requires a judgement from the inspector. For example: 'Warehouse-hygiene?'. The answer can be OK, not OK or not applicable if no warehouse is present.

The OK/NOK/N.A. questions are included in the report scoring and the analysis. For scoring the number of questions scored with OK are compared to the number of questions scored with OK + NOK.

Subsequent questions within OK/NOK/N.A. questions

The OK/NOK/N.A. type of questions, offers the option to include a subsequent question. When the inspector evaluates the status of the warehouse hygiene insufficient, you could ask for an additional evaluation or explanation by including a drop-down list with values to give a more detailed value. For instance, on a scale from 1 to 10. The types of questions that can be used in a subsequent question, are: Yes/No, Drop down list, short answer, long answer, number or date. The types of questions can also be used as a main question type.

Scoring questions with percentage (5S)

The scoring question with percentage offers the option to give a judgement about the extent to which the requirements are met. For example, 100% of 60%. It is possible to include a lower limit. If scoring is applied below the limit, the Easy to Inspect system will categorise the answer not only with the score but also as a nonconformity. A nonconformity report will be generated. This question type offers the option to set your own increment/steps so you can customize completely. These questions are commonly used in 5S audits.

Yes/No questions

The yes/no questions require a factual observation from the inspector. For example: 'Is the door blue?'. We included this option for you but advise you to use this type of question rarely to avoid any confusion with the OK/NOK/N.A. type of question. The Yes/No questions will NOT be included in the analyses.

The OK/NOK/N.A. question is meant for a professional evaluation. That type of question will be included in the checklist analysis. The Yes/No type of question is meant only for factual status reporting. It can for example be used in surveys. And the No answer does not generate an action. Such is only done by a Not OK answer in the OK / NOK / NA question type.

For instance: Would you like to have more days off? The answer is Yes or No. You don't answer with OK/NOK.



Drop down list/multiple choice

The drop-down list/multiple choice question offers the option for the inspector to select the answer in a drop-down list. When you create your questionnaire, you can select either numerical lists or alphabetical lists. You cannot create your own drop-down lists. You can choose from a series of lists that we predefined for you.

Drop down lists can be used to score according for instance A to F scales or can be used to select a percental grade, such as 80%. Drop down lists can be used in combination with pre- or suffixes such as #, %, \$, €, °.

The drop-down list type of questions is currently not yet included in the analysis of the report. However, all data can be exported to excel. So, when desired you can create your own analysis.

Short answer

This type of question offers the inspector to include an open answer. The amount of space is limited to 1 sentence. The short answer questions will NOT be included in the analyses.

Long answer

This type of question offers the inspector to include an open answer. The amount of space is not limited. Specifically, useful to include optional room for remarks, other findings etc. The long answer questions will NOT be included in the analyses.

Number question

This type of questions requires a numeric answer of the inspector. It disables to enter text. Very useful if you ask for instance about temperature conditions during the inspection or such. The number questions will NOT be included in the analyses.

Date question

This type of questions requires the inspector to enter a date via a date selector menu. Very useful if you ask for instance about expiry dates etc. The date questions will NOT be included in the analyses.

Locator/time

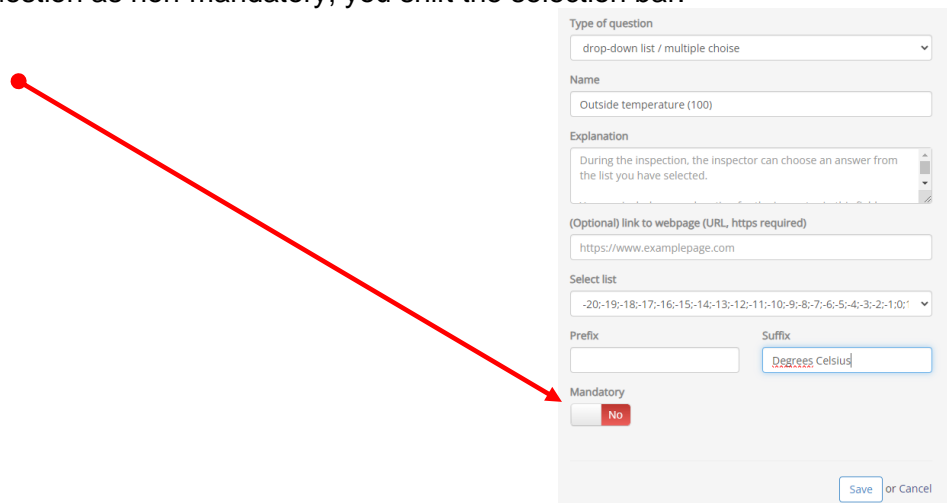
This type of questions will include the geo-position coordinates and time stamp in your checklist so it can be verified if the inspection actually took place on the place and time indicated.

3.2 Questions types and examples

Questions can be marked as Mandatory or Non Mandatory. Answering OK/NOK/N.A. and Score with a percentage-types are always mandatory. These type of questions are included in the checklist analyses and therefore must be filled in during an inspection.

As a default setting, the question is mandatory; the inspector must answer the question. You could change the setting in not mandatory. The inspector can, but must not answer the question during the inspection. After setting your question, save it.

To mark any other question as non-mandatory, you shift the selection bar.



Type of question
drop-down list / multiple choice

Name
Outside temperature (100)

Explanation
During the inspection, the inspector can choose an answer from the list you have selected.

(Optional) link to webpage (URL, https required)
https://www.examplepage.com

Select list
-20;-19;-18;-17;-16;-15;-14;-13;-12;-11;-10;-9;-8;-7;-6;-5;-4;-3;-2;-1;0;

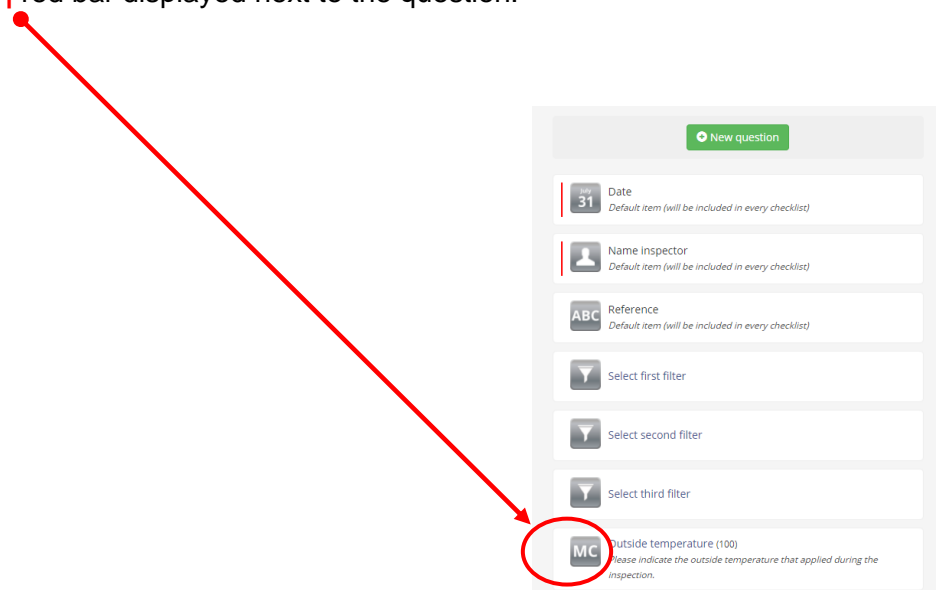
Prefix

Suffix
Degrees Celsius

Mandatory
 No

Save or Cancel

After saving, the question will be added. In the example you can see that the question is not mandatory. There is no red bar displayed next to the question.



New question

31 Date
Default item (will be included in every checklist)

Name inspector
Default item (will be included in every checklist)

ABC Reference
Default item (will be included in every checklist)

Select first filter

Select second filter

Select third filter

MC Outside temperature (100)
Please indicate the outside temperature that applied during the inspection.

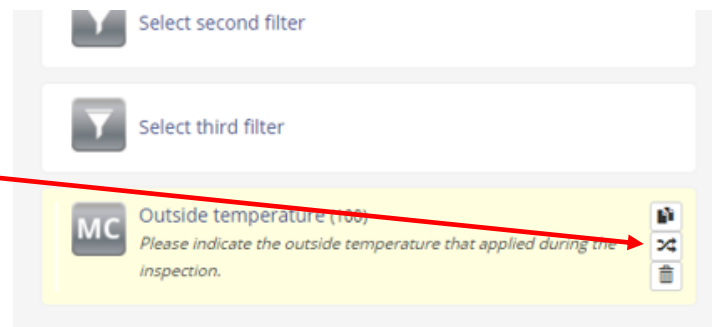
3.3 Moving questions to other positions or sections

When you create your checklist, you sometimes find out that the order is not completely logical. You'd like to change it to enable efficient inspections. Therefore, you can change the order of questions by moving a question. Such can be done within the introduction, within the inspection sections or in the checklist closing section. You can even transfer a question from one section to another.

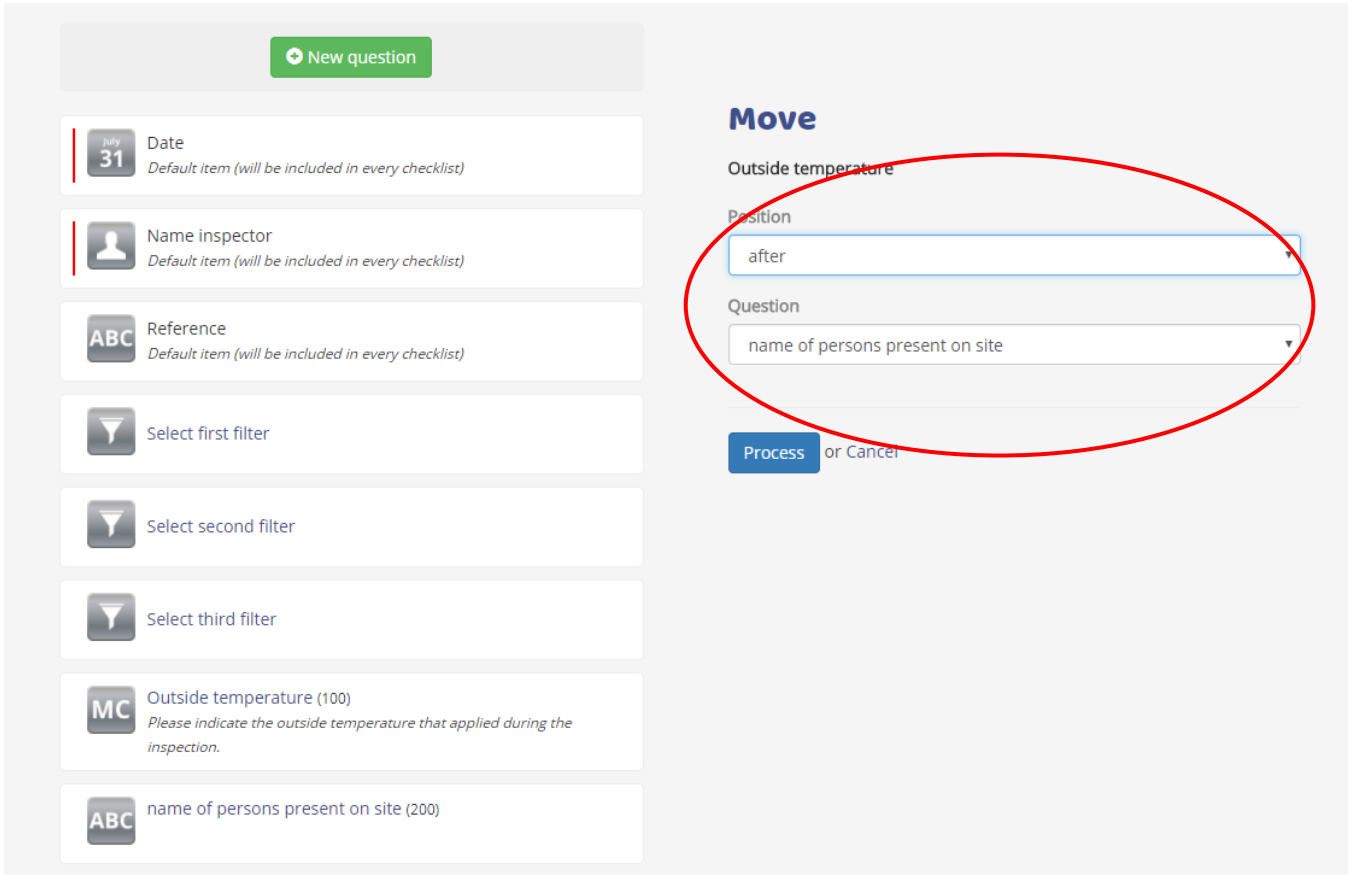
However, there are limits. You cannot mix up filters and general questions.

To change the order of a question you place your mouse above the question field. It will turn yellow and 3 selection boxes will be displayed.

To move the question tick the shift box.



You then select if you would like to position before or after a specific question.



Move

Outside temperature

Position
after

Question
name of persons present on site

Process or Cancel

Click process and your question will be moved:

Note that Easy to Inspect will add question numbers for internal use only. These will not be displayed in the checklist after publication



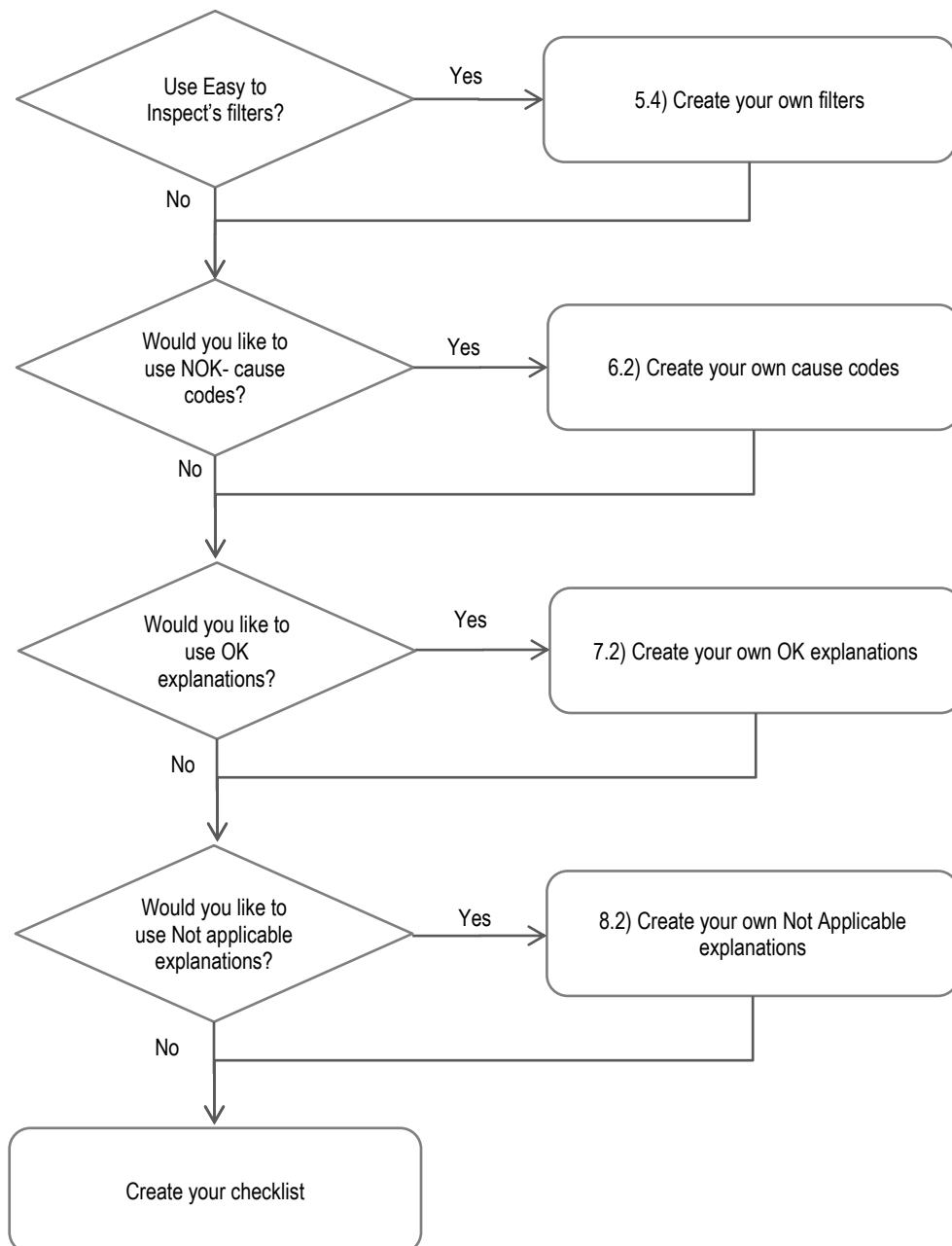
ABC name of persons present on site (200)

MC Outside temperature (300)
Please indicate the outside temperature that applied during the inspection.



4. Preparation steps

4.1 The step by step overview





5. Creating Filters

5.1. Why you should use a filter

The use of filters is important for two reasons.

- a) It simplifies the use of the checklist in the field, since the inspector only must choose a pre-defined value in a scroll down menu in the App. For instance: the city, region, branch, department, license plate, equipment number. This saves time and prevents database pollution.
- b) It enables depth analysis after a period of time. You could for instance not only analyse the results of inspection checklist 'A' but use the filter to analyse all inspections with checklist 'A' carried out in Branch 'X' in region 'Y' on Weekday 'Z'.

5.2. If you don't use filters

Easy to Inspect provides a basic filter function without using the custom filter-feature. When analysing you always must select:

- a) The checklist
- b) The period (from – to)
- c) All, 1 or multiple inspectors

Other selections cannot be made.

So, if you would like to analyse the difference in outcome of workplace inspections between the activities 'road construction' and 'sewer infrastructure works', you have to create a filter.

5.3. 3 Filters with 2 sub-filters each

With Easy to Inspect you can use a maximum of 3 Filters per checklist. You can define more than 3 filters, but only use 3 of them in the same checklist. Each filter has 3 levels.

Example:

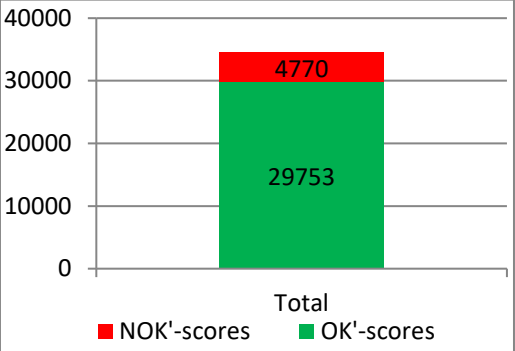
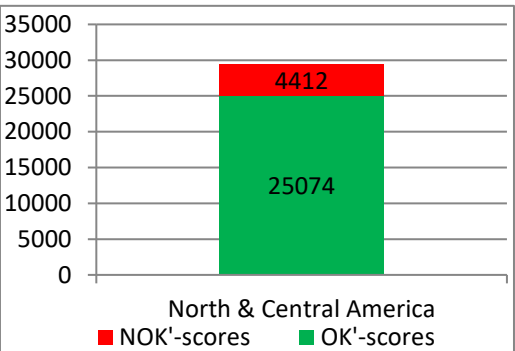
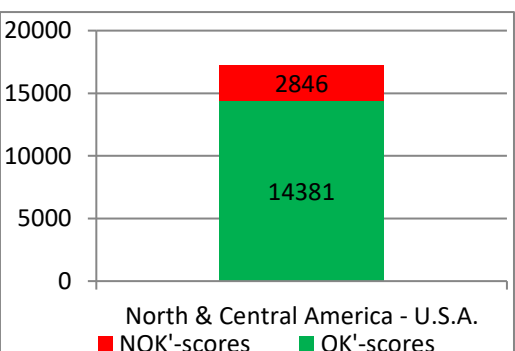
<i>Filter 1</i>	<i>Region</i>	<i>Filter 2</i>	<i>Branch</i>
<i>Filter 1-1</i>	<i>Country</i>	<i>Filter 2-1</i>	<i>Activity</i>
<i>Filter 1-1-1</i>	<i>State</i>		

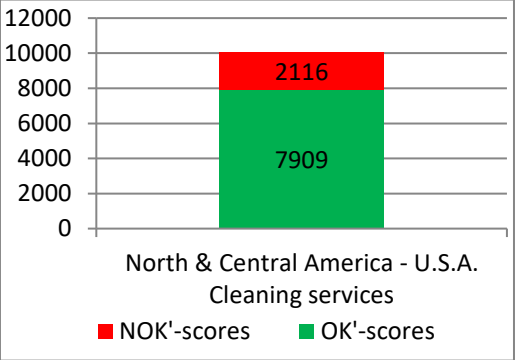
What does this mean? In your analysis, you can now select the inspection results of all regions, 1 region or multiple regions.

But you can analyse in more detail. When you use a sub-filter as well, you can zoom in. For instance, zoom in on a specific country in a region or even in more detail; analyse the inspection results of 2 specific states in a specific country.

Note: If you would like to analyse and make cross relations, you should use more filters. For instance, if you would like to analyse checklist results of activity 'A' in all regions, you best create a second filter "Activity" consisting of pre-set values like 'A', 'B' etc.

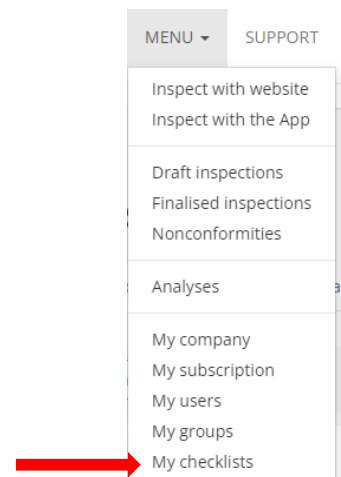
Underneath an example of the consequence of your filter-use in an analysis are shown.

Filter	Effect in your analysis	Explanation
No filter used in the checklist or not selected in the analysis	 <p style="text-align: center;">Total</p> <p style="text-align: center;">■ NOK'-scores ■ OK'-scores</p>	4.770 'NOK' findings and 29.753 'OK' findings. Average score 86% All inspection results of the selected checklist are included in the analysis.
1 filter used: 'North & Central America'	 <p style="text-align: center;">North & Central America</p> <p style="text-align: center;">■ NOK'-scores ■ OK'-scores</p>	4.412 'NOK' findings and 25.074 'OK' findings. Average score 85% Only the inspection results of the region 'North & Central America' are now included in the analysis.
1 filter used with 1 subfilter: 'North & Central America' - 'U.S.A.'	 <p style="text-align: center;">North & Central America - U.S.A.</p> <p style="text-align: center;">■ NOK'-scores ■ OK'-scores</p>	2.846 'NOK' findings and 18.728 'OK' findings. Average score 87% Only the inspection results of the region 'North & Central America', country 'U.S.A.' are now included in the analysis.

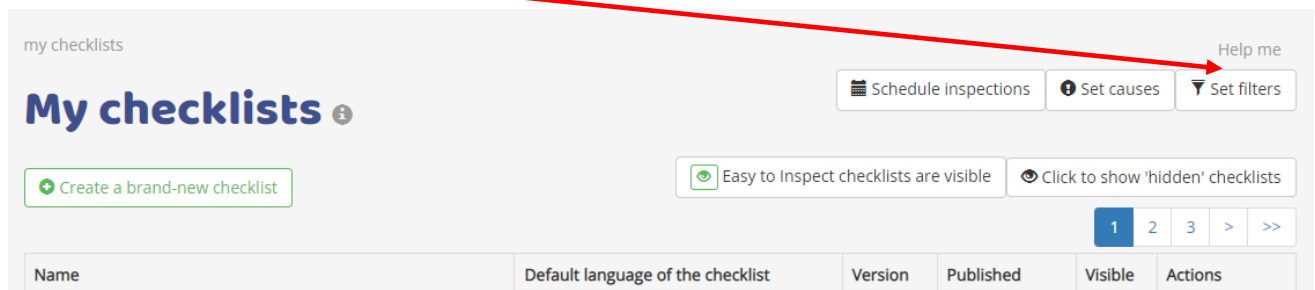
Filter	Effect in your analysis	Explanation
<p>2 filters used:</p> <p>Filter 1 with subfilter 1.1: 'North & central America'- 'U.S.A.'</p> <p>Filter 2: 'cleaning services'</p>	 <p>North & Central America - U.S.A. Cleaning services</p> <p>■ NOK'-scores ■ OK'-scores</p>	<p>2.116 'NOK' findings and 7.909 'OK' findings</p> <p>Average score 79%</p> <p>Only the inspection results of cleaning services in the region 'North & Central America', country 'U.S.A.' are now included in the analysis.</p>

5.4. Create a filter

Go to the menu and select 'My checklists'



Select the 'Set filters' button



my checklists

My checklists ⓘ

Help me

Schedule inspections Set causes **Set filters**

Create a brand-new checklist

Easy to Inspect checklists are visible Click to show 'hidden' checklists

1 2 3 > >>

Name	Default language of the checklist	Version	Published	Visible	Actions
------	-----------------------------------	---------	-----------	---------	---------



Suppose you would like to include following filter:

Name of the Filter			
Region – Country - City			
	Filter level 1	Filter level 2	Filter level 3
Name of the filter label	Region	Country	City
Filter values per label	North Americas	Canada	Montreal
	North Americas	Canada	Québec
	North Americas	Canada	Toronto
	North Americas	Canada	Vancouver
	North Americas	U.S.A.	Chicago
	North Americas	U.S.A.	New York
			Etc.

The above example enables to analyse inspection outcomes on following selections:

- North America
- Per 1 or multiple countries
- Per 1 or multiple cities

Select **'new'** for creating a new filter.



Fill in your filter name.

Name of the filter

My new filter

Note: It is important that you can recognise your filter when you create a checklist.

So, you best add the combination or the 1, 2 or 3 (sub)filter labels to the filter name.

Region - Country - City

Customer - Site

After creating a filter name, first fill in the name of each label. For instance, 'Region'. Do the same for the first subfilter labels. For instance, 'country'. And for the second subfilter. For instance 'city'.

Name of level 1



Then fill in a pre-set filter value and then press on the green '+' button to add the value to the filter.

Repeat this step, until all filter values of this main filter label are included. Don't forget to add the last value by clicking the '+' button.

Then press on the **arrow** next to a filter value to enter the pre-set values of your first sub-filter.

Fill in the values of the first sub-filter label. Press on the green '+' button to add a value. Repeat this step until all values are included.

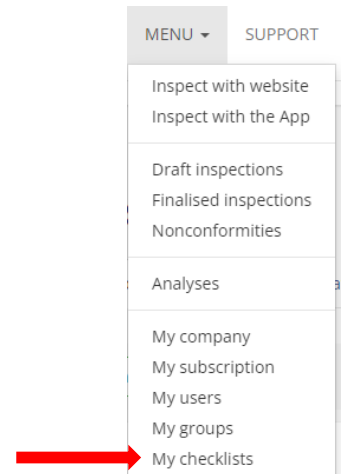
Press on the **arrow** next to a label value to include the pre-set values of your second sub-filter.

Note: All values that are entered are saved when you press on the green '+' button filter.

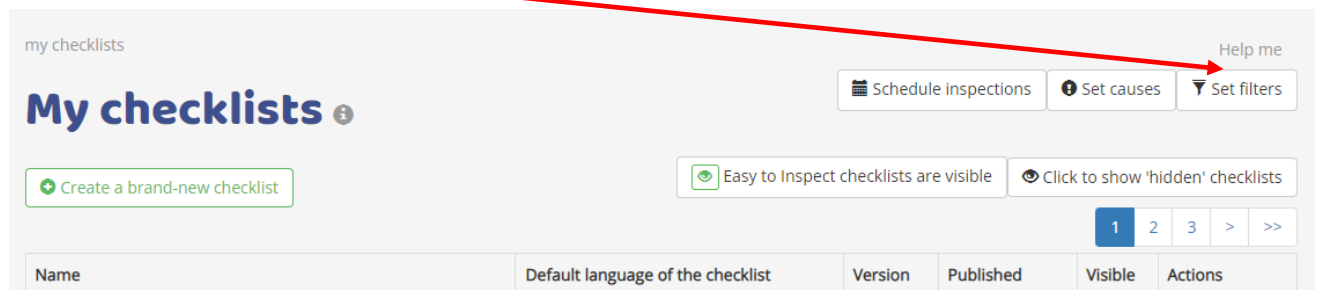
5.5. Edit your filter values

After using your checklist for a while, pre-set filter values can become outdated or obsolete. You can hide these for your users. You cannot delete the values, since this would disturb the analyses and reports that have been included in the database.

Go to the menu and select 'My checklists'



Select the 'Set filters' button



Select the **action** button to **edit** the filter



Press the green ‘eye’ next to the filter value. It will turn ‘red’. After synchronisation, this pre-set filter value will no longer be visible available for inspectors in the App.

Note: Do not replace a filter value by a new filter value. If this filter value has been used by an inspector, you will influence the accuracy of the analyses and corrupt filled in reports. **Don't !**

The function is only enabled to correct typing errors or changes in the value (e.g. the name of a site).

Project Number

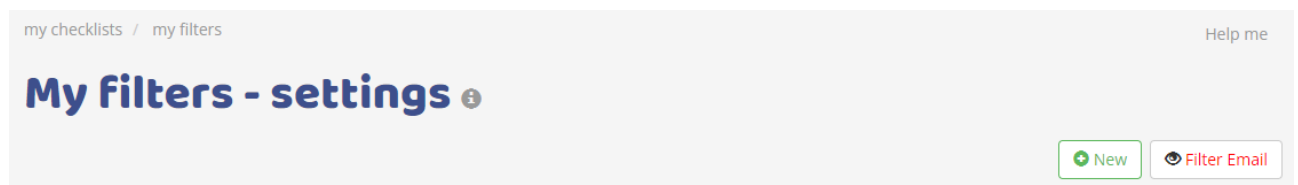
<input type="text"/>		
668223		
668464		

5.6. Link email addresses to filter values

In the menu “My filters – settings” a button is displayed “Filter Email”.

This button is disabled by default and can be enabled if you **upgrade your subscription**.

After an inspection is completed and uploaded, the report is automatically sent by email to the inspector. Several clients of Easy to Inspect however, would like to send the report to third parties (such as clients) as well. You can do so automatically if you use filters in your checklist. By enabling the Filter Email option, you can link email addresses to filters and so, send the reports to the selected parties automatically.



5.7. Advanced use of filters – auto email inspection and/or action reports.

As an additional feature, Easy to Inspect offers the option to send automated emails to email addresses linked to filter values. Such can be accommodated at an additional annual fee.

As a default, reports that are send in as finalised or Draft-version, will be sent to the inspector by email (PDF report).

It is possible to send report to other third parties as well, based on filters that have ben used in a checklist and that are linked to these email-addresses.

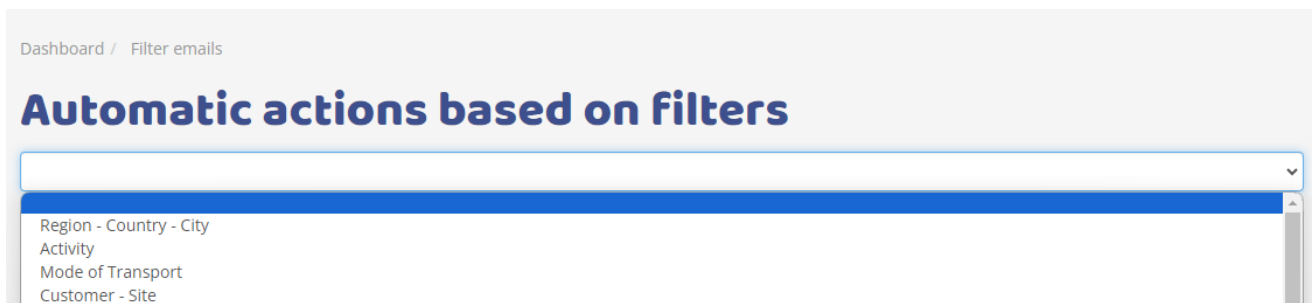
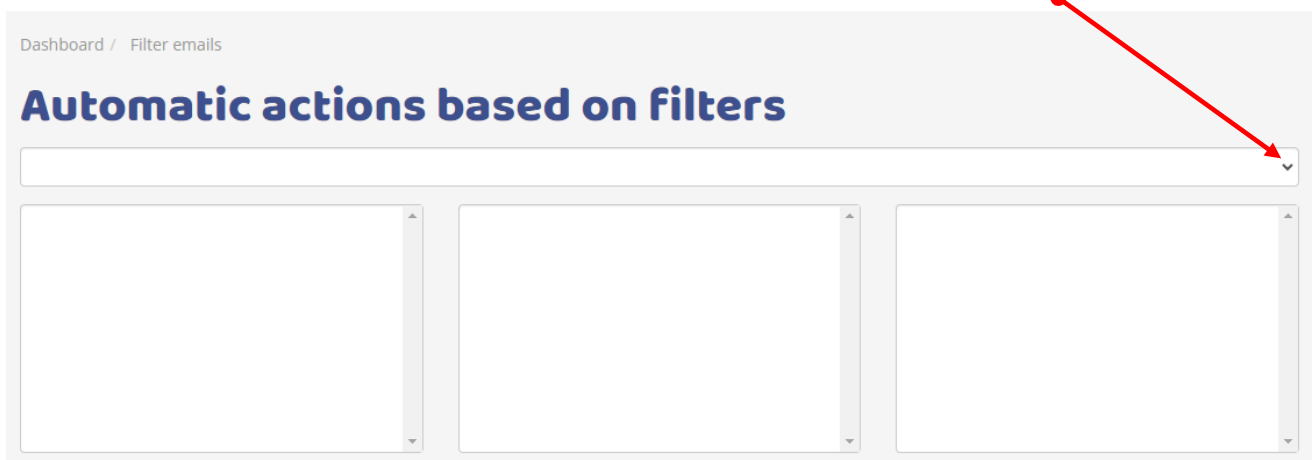
If your subscription supports this feature, you can define your settings as follows:



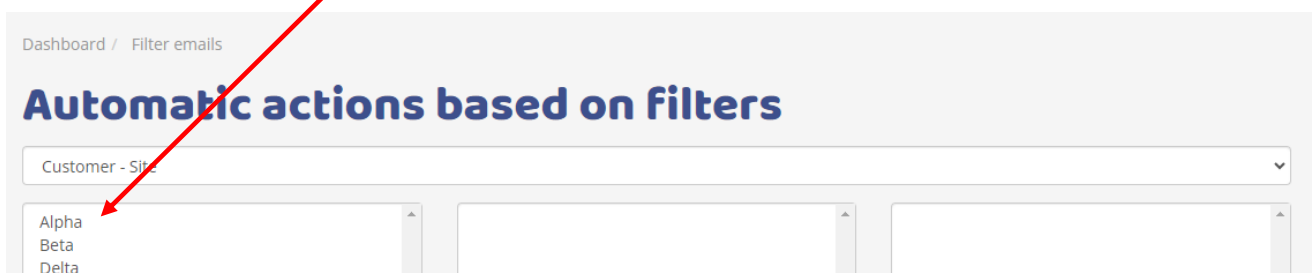
Select "advanced" in the filter setting menu



Select the filter to which you would like to link the email address out of the drop-down menu:



In our example we would like to send a copy of the inspection report to the client automatically. Simply click on the client's name to proceed.



The screen will enlarge and provides to options:

- A) Link a recipient to the filter value who will receive a copy of the inspection report.
- B) Link a recipient to the filter value that receives action reports of nonconformities that are identified during the inspection.

Dashboard / Filter emails

Automatic actions based on filters

Customer - Site

Alpha
Beta
Delta
ypsilon

Site 1
Site 2
Site 3

↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓

A: link report recipients to filter value

It is possible to send a copy of the inspection report to one or more preset recipients automatically. Enter the recipient's email address below (for an additional recipient, put it on a new line)

[Save](#)

B: Link action holder to filter value

If a deviation is found during an inspection, it is possible to automatically assign the action taker and send an email to this predefined action taker that must be a user of Easy to Inspect. Select the desired Easy to Inspect user below to link the action taker with the filter value.

Option A) Email the inspection report.

Type the email address in the box.

Notice: do not include the email address of the inspector.

The inspector always receives a copy of the report by email.

↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓

A: link report recipients to filter value

It is possible to send a copy of the inspection report to one or more preset recipients automatically. Enter the recipient's email address below (for an additional recipient, put it on a new line)

[Save](#)

Option B) email the action holder.

This works a bit differently. The action holder must be an active user within Easy to Inspect. Actions can only be managed and dealt with, by users of Easy to Inspect. So, it is only possible to select one of your users and link this user to the actions automatically.

Example:

All inspections regarding equipment, must be dealt with by the workshops of the areas to which the machines are assigned. Eg. workshop area N, E, S or W.

B: Link action holder to filter value

If a deviation is found during an inspection, it is possible to automatically assign the action taker and send an email to this predefined action taker that must be a user of Easy to Inspect. Select the desired Easy to Inspect user below to link the action taker with the filter value.

demo-user10@easytoinspect.com ▼

5.8 Common user questions when creating filters

No.	Issue	Remark
1	I would like to translate my filters	This is not possible. Most labels and filter values speak for themselves and don't need translations. If so, think of generally accepted and clear labels and values.
2	After editing the label value, my users can still not select these.	The filter value will be available in the App, after synchronisation. This can be done by restarting the app, automatically every 15 minutes or after selecting 'synchronise' in the user menu of the App for a manual synchronisation.
3	I would like to use a filter in other checklists too.	That is possible. A filter is not limited to use in just one single checklist.
4	I would like to start quickly and would not like to use a filter.	That is possible. The use of filters is not mandatory.
5	I would like to start quickly and would not like to use a filter. I will add a filter later.	That is not possible. Once a checklist is published you can't change the checklist. You'll have to copy the checklist and then modify the checklist by including the filter.
6	I would like to change my filter in a checklist that is in use by my inspectors.	The filter is part of the checklist. Changing the filter would impact the analyses. Therefore, you cannot change the filter labels. The filter contains pre-set values of which your inspectors can choose. These pre-set values can be changed. You can add new values or hide existing values for your users. For instance; you can add a new project to your list and hide a project that is finished.
7	I would like to delete filter values since they are obsolete / outdated.	Filter values cannot be deleted. They might be used in an inspection that is carried out. Deleting the value would impact the checklist reports and analyses. But you can disable them, so they won't be visible to the inspector anymore.
8	I would like to use 5 filters	Unfortunately, the use of the filters is restricted to 3 filters, with 3 levels each.
9	I would like to send my report automatically to different clients.	Upgrade your account to link filter values to email-addresses of your clients. Don't forget to modify your inspection checklists. The filters have to be used in the introduction section of your checklist.



No.	Issue	Remark
10	I would like to send action report to clients	This is not possible. Actions must be dealt with by users of Easy to Inspect within your account. The only option you have is to generate a 'client based' user in your account, so you can assign action automatically based on filter values.

6. Creating NOK-cause codes

6.1. Standard Easy to inspect cause codes

Easy to Inspect uses cause codes in the inspection. Why is that? During an inspection, you will find a defect, problem or nonconformity. For instance, a piece of equipment is not inspected in time, a food station is not properly cleaned, a workplace is not arranged in the right way, etc.

For your management (or authority, etc.) it is vital that you can present information for the reason of the defect or problem. Of course, you can determine this later, but who is better equipped to identify the direct cause than your inspector in the field together with the representative (if present). The inspector sees the defect, talks with the people on site and can identify the cause in the App.

Of course, you can update the cause if during a root cause analysis another reason turns out to be the real cause (see the Easy to Inspect Dashboard).

The unique feature of Easy to Inspect is, that we enable you to analyse all cause codes. We present them in a nice and clear overview to be used as management information. The analysis can be prepared with a push on the button and can be repeated as often as you wish.

Easy to inspect provides the following standard cause codes:

Unknown
Man: insufficient knowledge
Man: insufficient skills
Man: insufficient instruction
Man: procedures not followed
Method: no working method in place
Method: working method insufficient / incorrect
Method: incorrect working method applied
Means: not available
Means: incorrect use
Means: incorrect means used
Means: defect
Means: insufficient maintenance
Means: excessive wear and tear
Environment: weather
Environment: force majeure
Environment: vandalism
Environment: third party

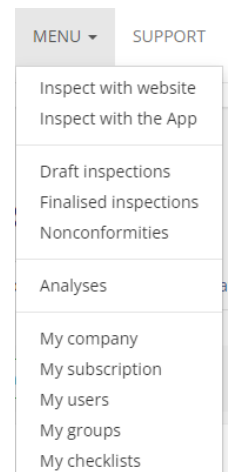
Every time the inspector fills in a negative score, a cause must* be selected. If you feel the above standard selection doesn't fit your needs, add others.

* when you create your checklist you can define per question if causes must be selected in case of a NOK answer.

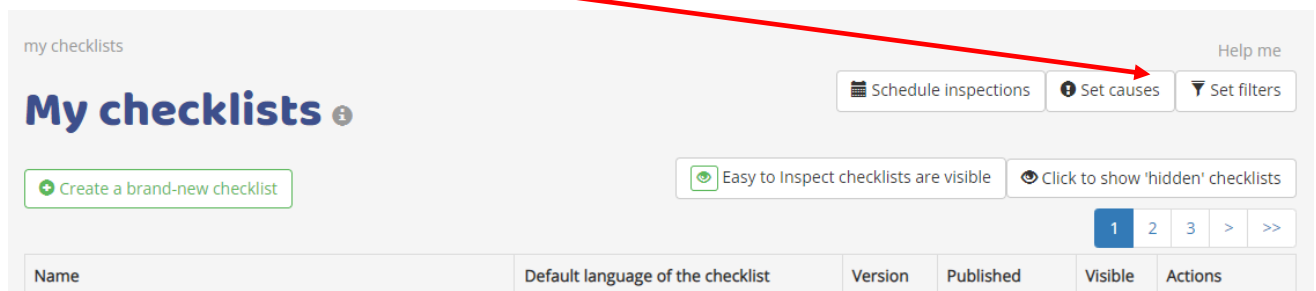


6.2. Create your own Not OK cause codes

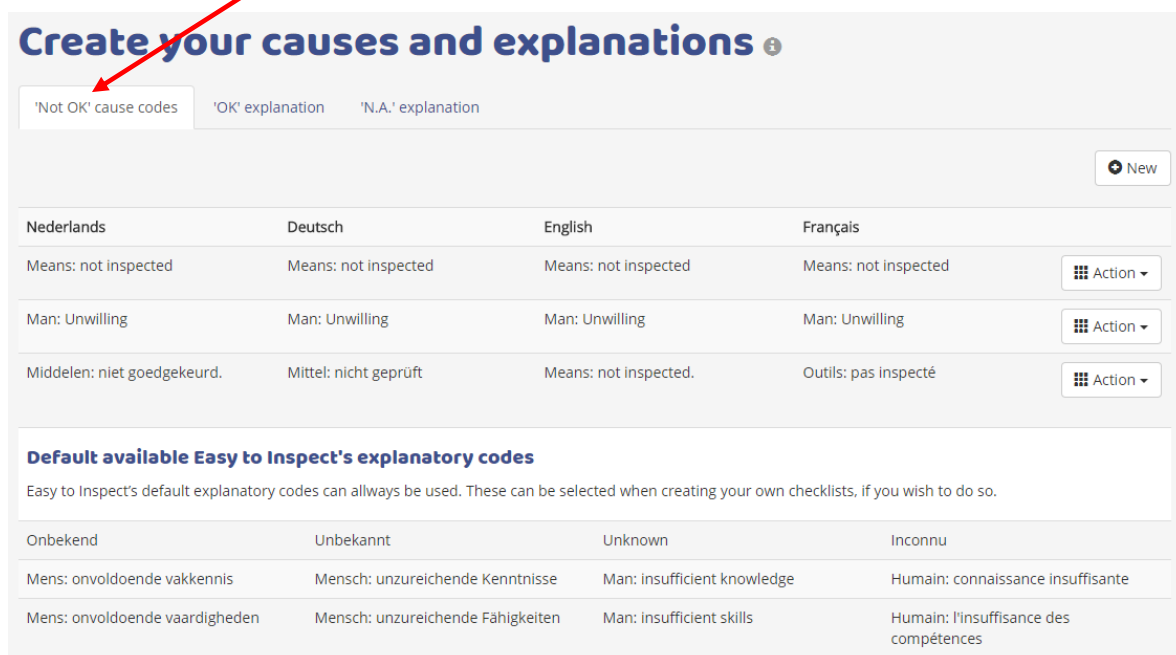
Go to the menu and select 'My checklists'



Select the 'Set causes' button.



Select the TAB 'Not OK' cause codes





Select 'new' for creating a new cause code.


Enter your cause code in the correct language field.

Attention! You must use all the language fields. Optionally you can use the same language in all different language fields! Just copy your text in the other fields.

After saving, you are done.

	Man: Unwilling
	Man: Unwilling
	Man: Unwilling
	Man: Unwilling

Now the cause code created will appear

Nederlands	Deutsch	English	Français	
Man: Unwilling	Man: Unwilling	Man: Unwilling	Man: Unwilling	 Action ▾

Do you want to correct a typing error; select the 'action' button and select 'edit'

English	Français	
Man: Unwilling	Man: Unwilling	 Action ▾
		 Edit
		 Delete

6.3. Frequent user questions when creating cause codes

No.	Issue	Remark
1	When I create a checklist, I would like to use a mix of own cause codes and the standard cause codes	That is possible. Don't copy the Easy to Inspect cause codes, to make them your own. You can always use them, also in combination with your own causes. You only have to create your own new cause codes.
2	I have to fill in all language fields.	The standard Easy to Inspect set up is that it provides multiple languages. If a user would select a language of which the fields are not filled in, he would see a blank field. We have decided that it would be better to copy paste your entry. Even if you decide to use Easy to Inspect only in one language.
3	I would like to change a cause code into another cause code	That is only possible when a cause code is not used in a checklist that has been published. Once a cause code is used in a checklist that is published for use, a cause code cannot be changed. This would impact the analyses.
4	I would like to delete a cause code.	That is only possible when a cause code is not used in a checklist. Once a cause code is used in a checklist, a cause code cannot be deleted. This would impact the analyses.



No.	Issue	Remark
5	When I fill in my inspection report, can I select multiple codes?	No that is not possible. Only 1 cause can be selected per Not OK answer.

7 Creating OK explanations

7.1 Standard Easy to Inspect OK explanations

Easy to Inspect enables you to use OK explanations in the inspection. Why is that? During an inspection, you will find things to be compliant to the requirements. In certain situations, you might want to have extra information. For instance, confirmation that an item explicitly conforms to a chapter of a standard or that it exceeds your expectations.

Easy to inspect provides following standard OK-explanations:

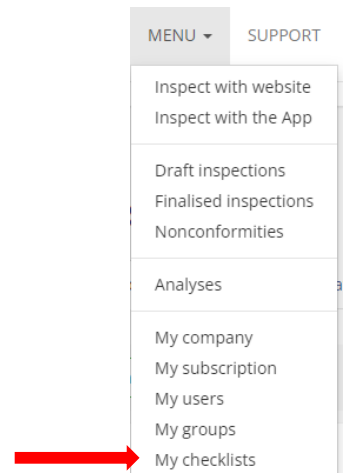
Exceeds the standard
Meets the standard
Meets the standard, with points of attention

Every time the inspector fills in a positive score, an explanation must* be selected. If you feel the above standard selection doesn't fit your needs, add others.

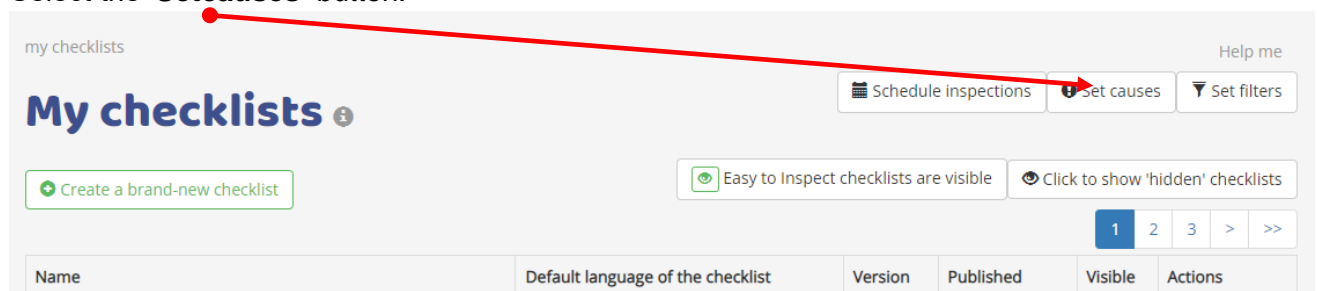
* when you create your checklist, you can define if OK explanations must be selected in case of an OK answer in Tab 1 of the wizard. When you create an individual checklist, you can always enter a specific setting for that single question. See chapter 9.5.

7.2 Adding OK explanations

Go to the menu and select 'My checklists'



Select the 'Setcauses' button.





Select the TAB 'OK' explanation

my checklists / my causes Help me

Create your causes and explanations +

'Not OK' cause codes **'OK' explanation** 'N.A.' explanation

+ New

Nederlands	Deutsch	English	Français
Default available Easy to Inspect's explanatory codes Easy to Inspect's default explanatory codes can allways be used. These can be selected when creating your own checklists, if you wish to do so.			
Voldoet aan de norm	Erfüllt den Standard	Meets the standard	Rencontre la norme
Voldoet aan de norm, met aandachtspunten	Erfüllt den Standard mit Aufmerksamkeitspunkten	Meets the standard, with attention points	Répond à la norme, avec des points d'attention
Beter dan de norm	Übertrifft den Standard	Exceeds the standard	Dépasse la norme

Select 'new' for creating a new OK explanation.







Enter your explanation code in the correct language field.

Add a new description

You can add your own descriptions and apply these in the custom made checklists. When you create a new checklist, you can select the specific description that have to be used.

Be aware! If you change a description, this will have impact on all checklists in which this cause code has been used! Please change only typing errors! Delete a description only when this is not used (in your own checklists)!

	<input type="text" value="Meets the hygiene standards"/>
	<input type="text" value="Meets the hygiene standards"/>
	<input type="text" value="Meets the hygiene standards"/>
	<input type="text" value="Meets the hygiene standards"/>

Save or

Attention! You must use all the language fields. Optionally you can use the same language in all different language fields! Just copy your text in the other fields.

After saving, you are done.



Now the explanatory code you created will appear.

my checklists / my causes Help me

Create your causes and explanations i

'Not OK' cause codes 'OK' explanation 'N.A.' explanation

+ New

Nederlands	Deutsch	English	Français	
Meets the hygiene standards	Meets the hygiene standards	Meets the hygiene standards	Meets the hygiene standards	⋮ Action ▾

Default available Easy to Inspect's explanatory codes

Easy to Inspect's default explanatory codes can always be used. These can be selected when creating your own checklists, if you wish to do so.

Voldoet aan de norm	Erfüllt den Standard	Meets the standard	Rencontre la norme
Voldoet aan de norm, met aandachtspunten	Erfüllt den Standard mit Aufmerksamkeitspunkten	Meets the standard, with attention points	Répond à la norme, avec des points d'attention
Beter dan de norm	Übertrifft den Standard	Exceeds the standard	Dépasse la norme



If you want to correct a typing error; select the **'action'** button and select **'edit'**

Notice: **Never change** an existing OK-explanation into another one. Only correct typos. If you do change an explanation description this will impact all inspection reports in which the explanation was selected.

Nederlands	Deutsch	English	Français	
complies to the requirement of standard API05	complies to the requirement of standard API05	complies to the requirement of standard API05	complies to the requirement of standard API05	⋮ Action ▾
Meets the hygiene standards	Meets the hygiene standards	Meets the hygiene standards	Meets the hygiene standards	⋮ Action ▾

Default available Easy to Inspect's explanatory codes

✎ Edit
🗑 Delete



7.3 Common user questions when creating OK explanations

No.	Issue	Remark
1	When I create a checklist, I would like to use a mix of own explanatory codes and the standard Easy to Inspect codes	That is possible. Don't copy the Easy to Inspect codes, to make them your own. You can always use them, also in combination with your own causes. You only have to create your new explanatory codes.
2	I have to fill in all language fields.	The standard Easy to Inspect set up is that it provides multiple languages. If a user would select a language of which the fields are not filled in, he would see a blank field. We have decided that it would be better to copy paste your entry if



No.	Issue	Remark
		you decide to use Easy to Inspect only in one language.
3	I would like to change an explanatory OK-code into another explanation.	That is only possible when an explanation is not yet used in a checklist that has been published. Once an explanation has been used in a checklist that is published for use, it cannot be changed. This would impact uploaded results.
4	I would like to delete an explanation code.	That is only possible when this has not yet been used in a checklist. Once an OK-explanation code is used in a checklist, it cannot be deleted. This would impact the uploaded results.

8 Creating Not Applicable explanations

8.1 Standard Easy to Inspect Not Applicable explanations

Easy to Inspect enables you to use Not Applicable explanations in the inspection. Why is that? During an inspection, you will find subject to be not applicable. In certain situations, you would like to ensure that the inspection point is correctly interpreted and that questions are only marked as N.A. if the activity is not taking place, a provision is not present on site etc.

Easy to inspect provides following standard N.A.-explanations:

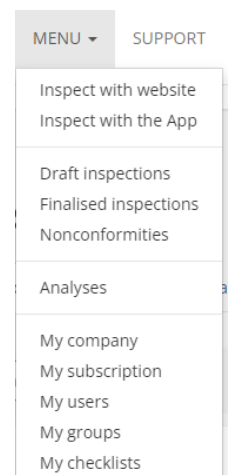
No local laws apply
Provision not available
Activity does not take place
Not checked during inspection
Could not be checked during inspection

Every time the inspector fills in a N.A. score, an explanation must* be selected. If you feel the above standard selection doesn't fit your needs, add others.

* When you create your checklist, you can define if N.A. explanations must be selected in case of an N.A. answer in Tab 1 of the wizard. When you create an individual checklist, you can always enter a specific setting for that single question. See chapter 9.5.

8.2 Adding Not Applicable explanations

Go to the menu and select 'My checklists'





Select the 'Set causes' button.

my checklists Help me

My checklists ⓘ

[Create a brand-new checklist](#) [Easy to Inspect checklists are visible](#) [Click to show 'hidden' checklists](#)

[Schedule inspections](#) [Set causes](#) [Set filters](#)

1 2 3 > >>

Name	Default language of the checklist	Version	Published	Visible	Actions
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Select the TAB 'N.A.' explanation

Create your causes and explanations ⓘ

'Not OK' cause codes 'OK' explanation **'N.A.' explanation**

[New](#)

Nederlands	Deutsch	English	Français
------------	---------	---------	----------

Default available Easy to Inspect's explanatory codes

Easy to Inspect's default explanatory codes can allways be used. These can be selected when creating your own checklists, if you wish to do so.

Geen lokale wetgeving van toepassing	Es gelten keine lokalen Gesetze	No local laws apply	Aucune loi locale applicable
Voorziening niet aanwezig	Bereitstellung nicht verfügbar	Provision not available	Provision non disponible
Activiteit vindt niet plaats	Aktivität findet nicht statt	Activity does not take place	L'activité n'a pas lieu
Niet gecontroleerd tijdens inspectie	Nicht während der Inspektion überprüft	Not checked during inspection	Non vérifié pendant l'inspection
Kon niet worden gecontroleerd tijdens inspectie	Konnte während der Inspektion nicht überprüft werden	Could not be checked during inspection	N'a pas pu être vérifié pendant l'inspection

Select 'new' for creating a new N.A. explanation.







Enter your explanation code in the correct language field.



Add a new description

You can add your own descriptions and apply these in the custom made checklists. When you create a new checklist, you can select the specific description that have to be used.

Be aware! If you change a description, this will have impact on all checklists in which this cause code has been used! Please change only typing errors! Delete a description only when this is not used (in your own checklists)!

	<input type="text" value="Applies only to installation of before 2010"/>
	<input type="text" value="Applies only to installation of before 2010"/>
	<input type="text" value="Applies only to installation of before 2010"/>
	<input type="text" value="Applies only to installation of before 2010"/>

or

Attention! You must use all the language fields. Optionally you can use the same language in all different language fields! Just copy your text in the other fields.

After saving, you are done.

Now the explanatory code you created will appear

Create your causes and explanations ⓘ

'Not OK' cause codes 'OK' explanation 'N.A.' explanation

Nederlands	Deutsch	English	Français	
Applies only to installation of before 2010	Applies only to installation of before 2010	Applies only to installation of before 2010	Applies only to installation of before 2010	<input type="button" value="Action"/>

Default available Easy to Inspect's explanatory codes

Easy to Inspect's default explanatory codes can always be used. These can be selected when creating your own checklists, if you wish to do so.

Geen lokale wetgeving van toepassing	Es gelten keine lokalen Gesetze	No local laws apply	Aucune loi locale applicable
--------------------------------------	---------------------------------	---------------------	------------------------------

Do you want to correct a typing error; select the 'action' button and select 'edit'.

English	Français
Applies only to installation of before 2010	Applies only to installation of before 2010

-
-



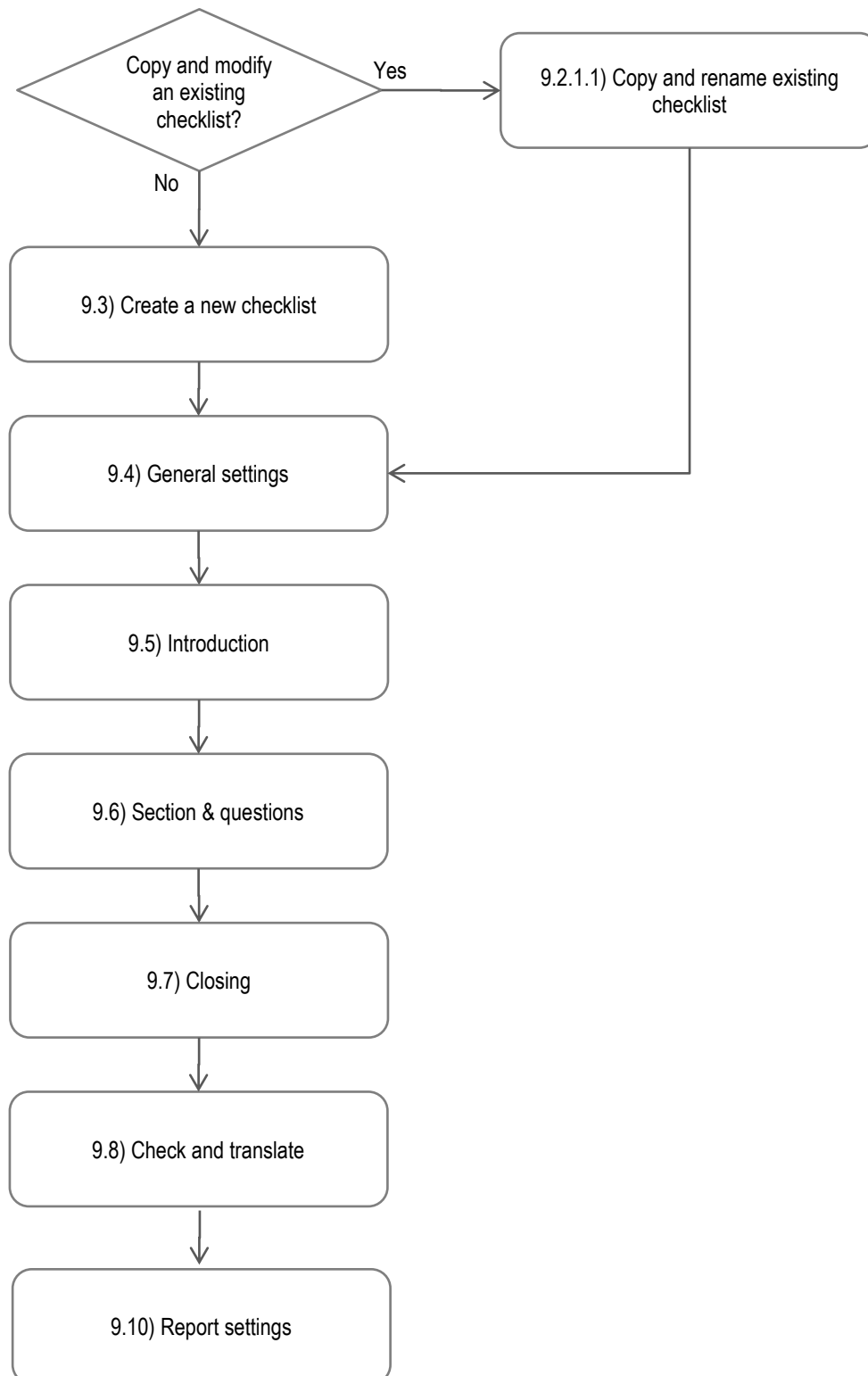
8.3 Common user questions when creating N.A. explanations

No.	Issue	Remark
1	When I create a checklist, I would like to use a mix of own N.A. explanations and the standard Easy to Inspect explanations	That is possible. Don't copy the Easy to Inspect N.A. explanations, to make them your own. You can always use them, also in combination with your own causes. You only have to create your new N.A. explanations.
2	I have to fill in all language fields.	The standard Easy to Inspect set up is that it provides multiple languages. If a user would select a language of which the fields are not filled in, he would see a blank field. We have decided that it would be better to copy paste your entry if you decide to use Easy to Inspect only in one language.
3	I would like to change an N.A. explanation into another N.A. explanation.	That is only possible when an N.A. explanation is not used in a checklist that has been published. Once an N.A. explanation has been used in a checklist that is published for use, it cannot be changed. This would impact the uploaded results.
4	I would like to delete an N.A. explanation.	That is only possible when an N.A. explanation is not used in a checklist. Once an N.A. explanation is used in a checklist, it cannot be deleted. This would impact the uploaded inspection results.



9 Creating a checklist

9.1 The step-by-step overview

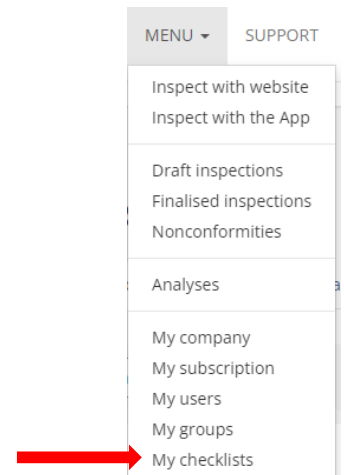


9.2 Copy an existing checklist

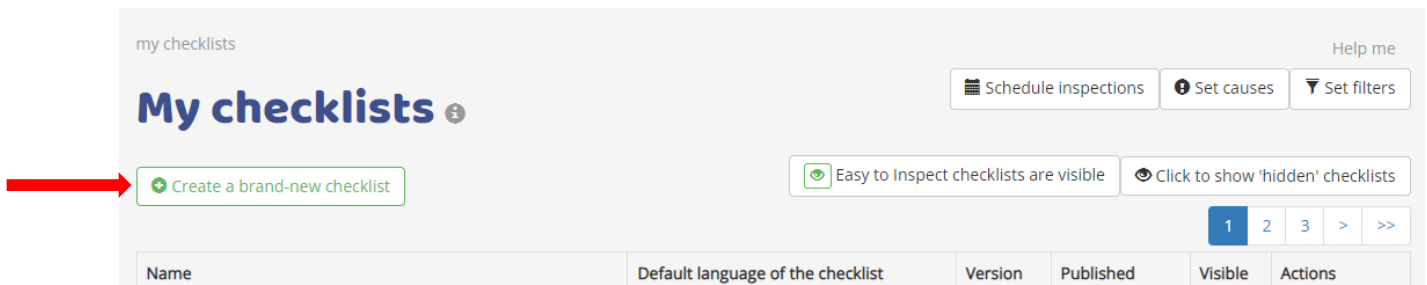
If you would create a new checklist you might want to work on an existing checklist. For this reason, you can copy and modify an existing checklist, and publish it as a new checklist. You can either choose a standard Easy to Inspect checklist or a checklist that was generated by yourself or a colleague.

9.2.1 Copy an existing Easy to Inspect example checklist

Go to the menu and select 'My checklists'



Select the 'create a brand new checklist' button.



my checklists Help me

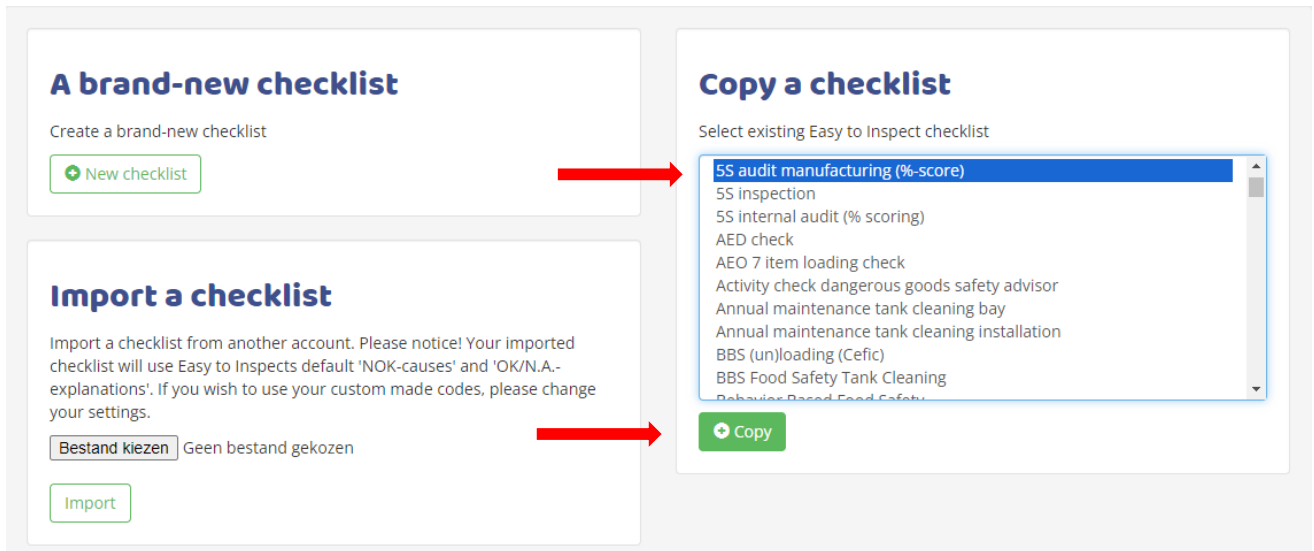
My checklists

Easy to Inspect checklists are visible
 Click to show 'hidden' checklists

1 2 3 > >>

Name	Default language of the checklist	Version	Published	Visible	Actions
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Select the checklist you would like to copy from the scroll down menu. After selecting press 'copy'.

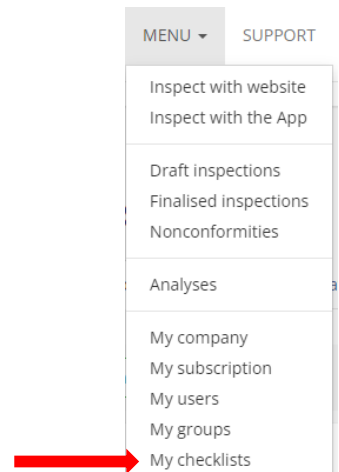


Your new checklist is now generated. It is still named as the checklist you selected to be copied with an extension 'copy'. You must now rename the checklist and press SAVE.

You can now modify the checklist (see 9.3).

9.2.2 Copy an existing (own) checklist

Go to the menu and select 'My checklists'



Select the checklist you would like to copy in the overview **'My checklists'**. Select the **'Action'** button and click on **'copy'**.

5S inspection (% questions)	Dutch	4	Yes		Action ▾ + Copy + Assign users Edit Export
5S inspection (Easy to Inspect)	Dutch	2	Yes		
7 item loading check (Easy to Inspect)	Dutch	2	Yes		

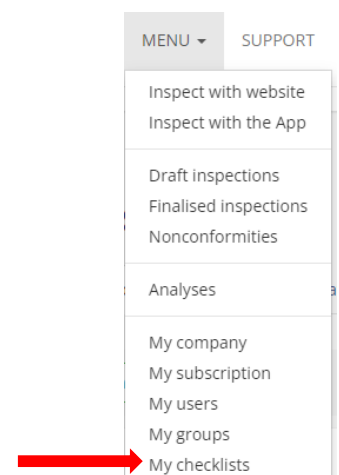
You can now modify the checklist (see 9.3).

9.2.3 Import an existing checklist and modify this checklist

It is possible to export an existing checklist and import this checklist in another account that you might use. You always must modify this updated checklist, since specific element of the checklist cannot be exported (such as filters and account specific NOK-cause codes or OK/N.A.-explanations). This function is especially useful for companies with multiple accounts or consultants that would like to use their inspection checklists in customer specific accounts that they control as an administrator.

Notice: Easy to Inspect does not facilitate import of checklists that are made in Excel.

Go to the menu and select **'My checklists'**



Select the **'create a brand new checklist'** button.

my checklists Help me

My checklists ⓘ

+ Create a brand-new checklist

👁 Easy to Inspect checklists are visible

👁 Click to show 'hidden' checklists

1
2
3
>
>>

Name	Default language of the checklist	Version	Published	Visible	Actions

Click the **'Select file'** button, select you file from the folder where you saved your export and press the import button.

A brand new checklist

Create a brand new checklist

+ New checklist

Import a checklist

Import a checklist from another account. Please notice! Your imported checklist will use Easy to Inspects default 'NOK-causes' and 'OK/N.A.-explanations'. If you wish to use your custom made codes, please change your settings.

📁 Select file

➤ Import

Copy a checklist

Select existing Easy to Inspect checklist

- 5-S internal audit
- 5S inspection
- AED check
- AEO 7 item loading check
- Activity check dangerous goods safety advisor
- Annual maintenance tank cleaning bay
- Annual maintenance tank cleaning installation
- BBS (un)loading (Cefic)
- BBS Food Safety Tank Cleaning
- Behavior Based Food Safety

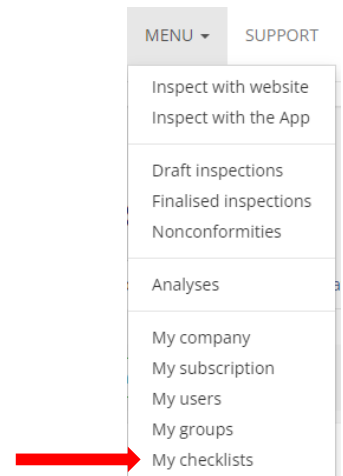
+ Copy

You can now modify the checklist (see 9.3).

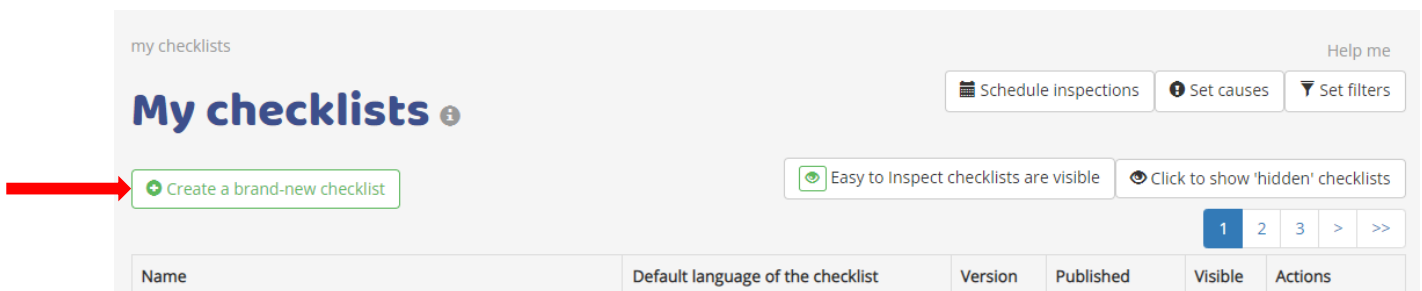
9.3 Create a brand-new checklist

9.3.1 Introduction

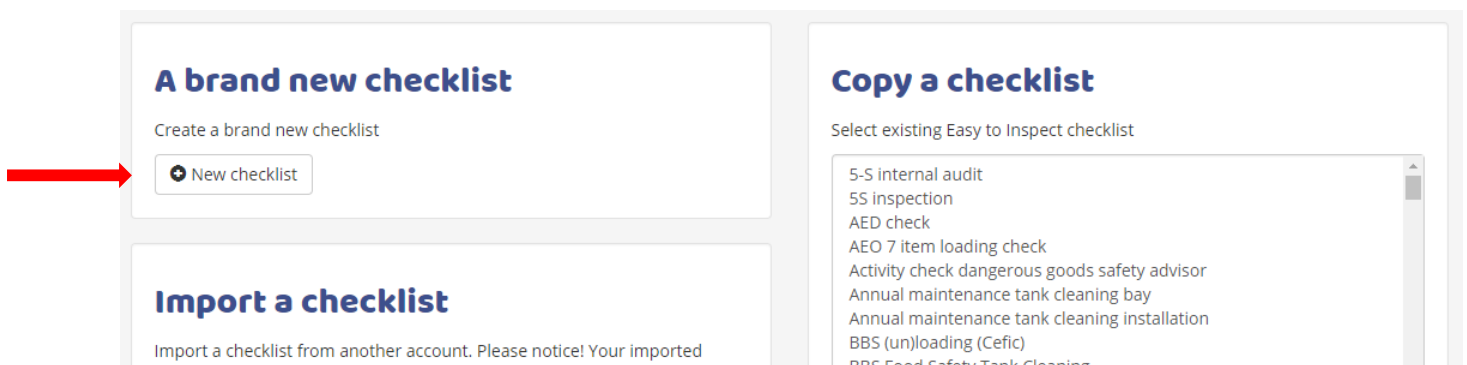
Go to the menu and select 'My checklists'



Select the 'create a brand new checklist' button.



Select 'new checklist' to generate a new checklist.





Your new checklist is now generated. You can give your checklist a name.

Edit your checklist ? Preview

General settings Introduction Questions Closing Translate Report settings

Default language of the checklist: English

Checklist Name: New Checklist

[More settings](#)

Save

9.3.2 The default language

Easy to Inspect is fit for use in multiple languages: English, German, French and Dutch.

But you don't need to use Easy to Inspect in all languages. To prevent unnecessary translations, we included a default language. Once you create a new checklist, you select the default language.

This means that all the questions that you create in this default language, also will be displayed in this language when a user selects another language in the App. In the 'Translate' section of the wizard, you can always overwrite this default language with specific translations.

my checklists / new checklist Help me

Edit your checklist ? Preview

General settings Introduction Questions Closing Translate Report settings

Default language of the checklist: English

Checklist Name: New Checklist

Results that have been made using the App, can be edited online. Yes

Inspection results that have been made using the App, may be uploaded as incomplete. Yes

OK-NOK-question: Automatically create a non-conformity for 'Not OK'- answers. Yes

Completed inspections that have been made using the App, can be uploaded as drafts. Yes

Scoring (SS): Automatically create a non-conformity for answers below the limit value. Yes

[More settings](#)

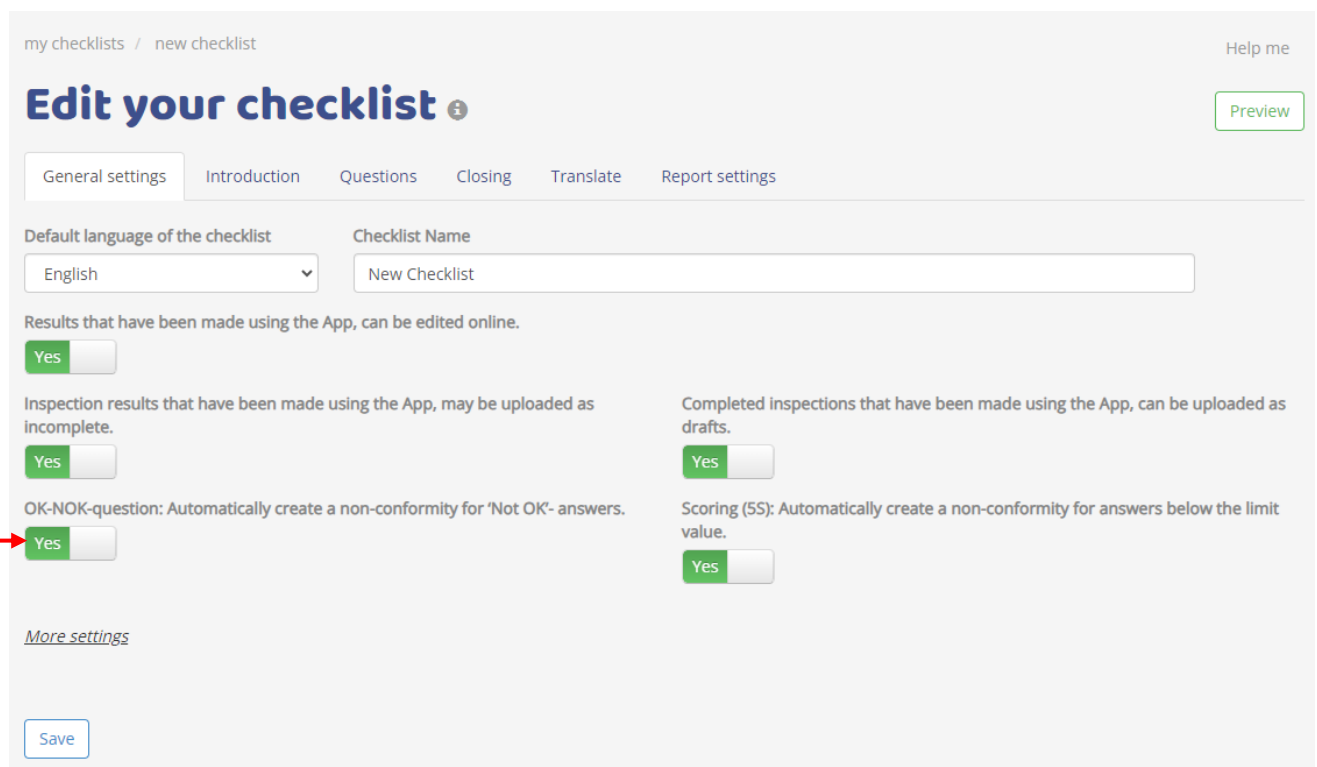
Save

9.3.3 Switch off nonconformity creation in case of NOK-answers.

The primary used question type within our system is the OK/NOK/NA question type. As a default setting, a nonconformity report will be generated in case of a non conformance (NOK-answer).

After the inspection is completed, the inspector can access the inspection report via the website, and assign actions to action takers.

If you don't use the feature in a specific checklist, you can switch this off. This prevents polluting your nonconformity statistics. Once switched off, you cannot later switch the feature on again.



my checklists / new checklist Help me

Edit your checklist Preview

General settings Introduction Questions Closing Translate Report settings

Default language of the checklist: English Checklist Name: New Checklist

Results that have been made using the App, can be edited online. Yes

Inspection results that have been made using the App, may be uploaded as incomplete. Yes

OK-NOK-question: Automatically create a non-conformity for 'Not OK'- answers. Yes

Completed inspections that have been made using the App, can be uploaded as drafts. Yes

Scoring (SS): Automatically create a non-conformity for answers below the limit value. Yes

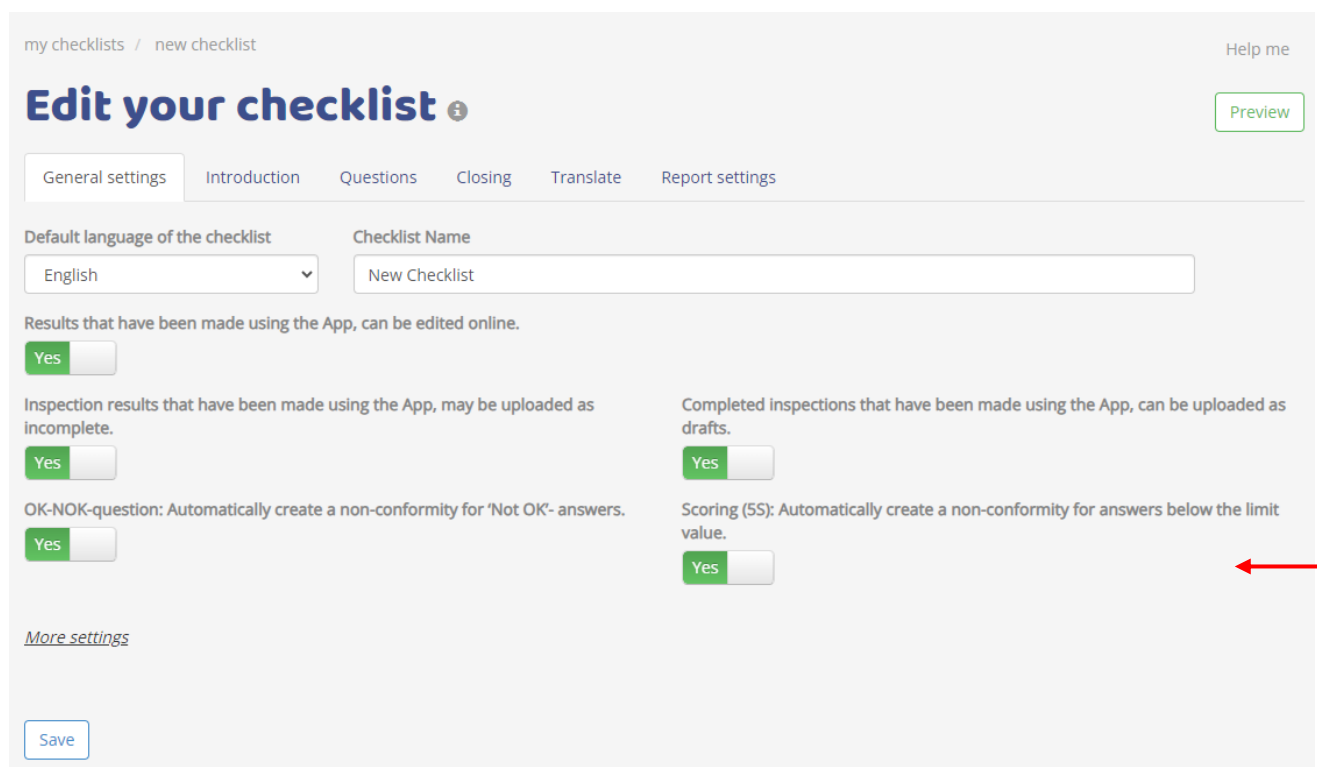
[More settings](#)

9.3.4 Switch off nonconformity creation in case of “scoring with a percentage-questions”.

Also, in case of using the “scoring with a percentage” - question, as a default setting, a nonconformity report will be generated in case of a nonconformance. When a nonconformance will be generated, is defined by the lower limit value which is still acceptable per question. This might be only 100% but also be 80% or 75% or any other value.

After the inspection is completed, the inspector can access the inspection report via the website and assign actions to action takers.

If you don't use the feature in a specific checklist, you can switch this off. This prevents polluting your nonconformity statistics. Once switched off, you cannot later switch the feature on again.



my checklists / new checklist Help me

Edit your checklist +

Preview

General settings | Introduction | Questions | Closing | Translate | Report settings

Default language of the checklist: English

Results that have been made using the App, can be edited online. Yes

Inspection results that have been made using the App, may be uploaded as incomplete. Yes

Completed inspections that have been made using the App, can be uploaded as drafts. Yes

OK-NOK-question: Automatically create a non-conformity for 'Not OK'- answers. Yes

Scoring (SS): Automatically create a non-conformity for answers below the limit value. Yes

[More settings](#)

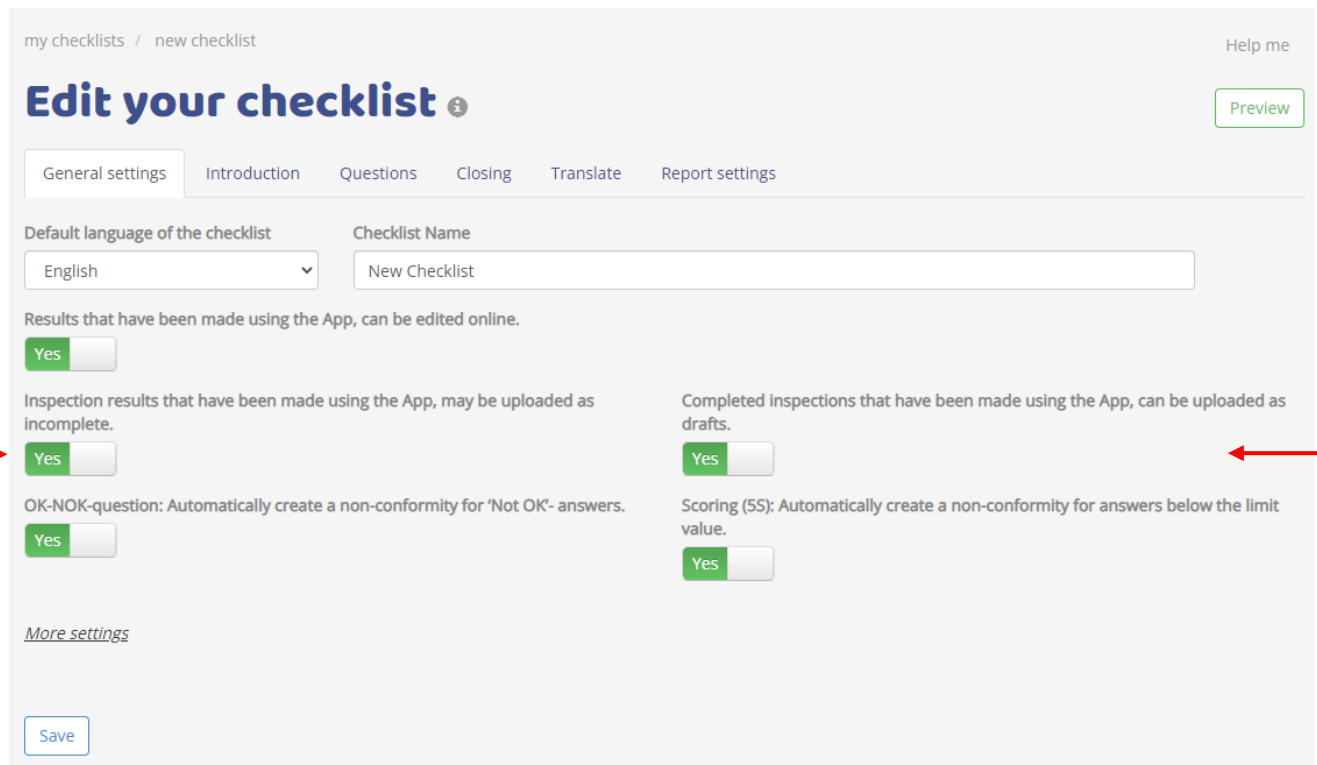
Save

9.3.5 Enable uploading incomplete and / or draft reports

When you are filling your inspection with the App (phone or tablet), you might wish to complete the inspection later by adding a photo to an inspection point, adding comments etc. It is possible to upload an incomplete inspection. Incomplete because not all questions are answered completely or incomplete because the outcome needs are review and probably a revision.

You can select if a report can be uploaded as an incomplete version or as a draft report. In both cases the report will be archived in our database as a draft report.

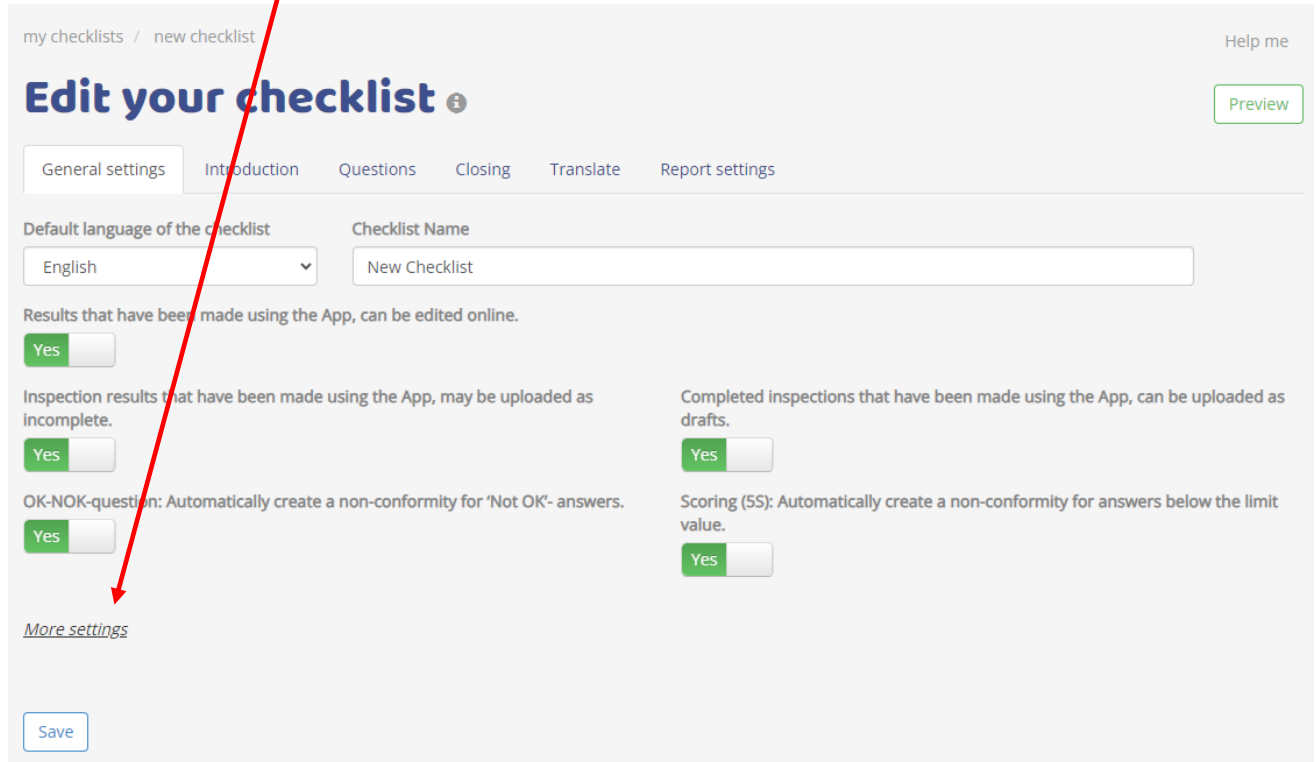
Notice: When a checklist is published, filled in with the app, and the inspection is uploaded as a draft or incomplete result, no nonconformity reports will be generated. These are only generated when the status draft is changed to finalised.



The screenshot shows the 'Edit your checklist' interface. At the top, there is a breadcrumb 'my checklists / new checklist' and a 'Help me' link. The main heading is 'Edit your checklist' with a plus icon. Below this is a navigation bar with tabs: 'General settings' (selected), 'Introduction', 'Questions', 'Closing', 'Translate', and 'Report settings'. A 'Preview' button is located in the top right corner. The 'General settings' section includes a dropdown for 'Default language of the checklist' (set to 'English') and a text input for 'Checklist Name' (set to 'New Checklist'). Below these are four toggle switches, each with a 'Yes' label and a green indicator. The first toggle is for 'Results that have been made using the App, can be edited online.' The second is for 'Inspection results that have been made using the App, may be uploaded as incomplete.' The third is for 'OK-NOK-question: Automatically create a non-conformity for 'Not OK'- answers.' The fourth is for 'Completed inspections that have been made using the App, can be uploaded as drafts.' The fifth is for 'Scoring (SS): Automatically create a non-conformity for answers below the limit value.' At the bottom left, there is a 'More settings' link and a 'Save' button. Red arrows point from the text above to the second and fourth toggle switches.

9.4 More default setting regarding 'cause' and 'explanatory' codes

Enter the button 'more settings' to tweak your checklist to your specific needs.



my checklists / new checklist Help me

Edit your checklist ⓘ

General settings Introduction Questions Closing Translate Report settings Preview

Default language of the checklist: English

Results that have been made using the App, can be edited online. Yes

Inspection results that have been made using the App, may be uploaded as incomplete. Yes

OK-NOK-question: Automatically create a non-conformity for 'Not OK'- answers. Yes

Completed inspections that have been made using the App, can be uploaded as drafts. Yes

Scoring (5S): Automatically create a non-conformity for answers below the limit value. Yes

[More settings](#)

9.4.1. Select Not OK-cause codes

Easy to Inspect is set up in such way that it enables analysing inspection-results carried out. For that reason 'Not OK' cause codes are included in the system. Every time the inspector detects a non complying issue in the field, he has to try to identify the cause of this deviation.

Note: Easy to Inspect adds value when you use this option. Specifically when you use the analysis function of our inspection platform. However it is not mandatory to use cause codes in case of Not OK answers. When you create your inspection questions you can select if you require the use of this option.

Furthermore you have another option in selecting the Not OK-cause codes:

- a) Select a set of cause codes that are default for all checklists questions (see 9.4.1 / 9.6.2.1.1.1).
- b) Select a set of cause codes per question (see 9.6.2.1.1.2)

Notice: Even if you select default cause codes for all questions, it is always possible to change this set of cause codes per individual checklist question (see 9.6.2.1.1.2).



9.4.1.1. Selection of default Not OK-cause codes

When you want to get feedback from inspectors on causes, you have to determine which cause codes have to be used in the checklist. As a default setting, all the Easy to Inspect predefined cause codes are included in the new checklist that you create. Of course you can deselect some of them / all of them or add own developed custom cause codes.

When a new checklist is created, the default Not OK cause codes that have been predefined by Easy to inspect are included in the checklist.

You can:

- ✓ deselect one or multiple causes
- ✓ add one or multiple your cause codes
- ✓ combine Easy to Inspects default causes with own cause codes

Just select the causes you would like to select or deselect and press the arrow button.

'Not OK' cause codes Add new causes and explanations

Available:

- Your cause codes
- Man: unwilling
- Easy to Inspect cause codes

Selected:

- Environment: force majeure
- Environment: third party
- Environment: vandalism
- Environment: weather
- Man: insufficient instruction
- Man: insufficient knowledge
- Man: insufficient skills
- Man: procedures not followed
- Means: defect
- Means: excessive wear and tear

'Not OK' cause codes Add new causes and explanations

Available:

- Environment: force majeure
- Environment: third party
- Environment: vandalism
- Environment: weather
- Means: defect
- Means: excessive wear and tear
- Means: incorrect means used
- Means: incorrect use
- Means: insufficient maintenance
- Means: not available

Selected:

- Man: insufficient instruction
- Man: insufficient knowledge
- Man: insufficient skills
- Man: procedures not followed
- Man: unwilling
- Unknown

The result of this action will be that the selected set of causes will be available in all the checklist questions that require a OK/NOK/N.A. answer in case of a NOK answer.

If a specific cause code has to be added, follow the instructions of chapter 6.

Notice: Since the inspector cannot always determine a cause code when inspecting in the field, we strongly recommend to include always the cause code 'unknown'.

9.4.2. Select OK-explanation codes

It might be that you would like your inspectors, to confirm quickly, why an inspected item is compliant. For that reason 'OK' explanations are included in the system. It is not mandatory to use OK explanation codes in case of OK answers. When you create your inspection questions you can select if you require the use of this option. When you create a new checklist, the use of OK explanations is disabled. Enabling can be done in TAB 'Questions' (see 9.6.2.1.1.1).

Furthermore you have another option in selecting the OK-explanatory codes:

- c) Select a set of cause codes that are default for all checklists questions (see 9.4.2.1).
- d) Select a set of cause codes per question (see 9.6.2.1.1.2)

Note: Even if you select default cause codes for all questions, it is always possible to change this set of cause codes per individual checklist question (see 9.6.2.1.1.2).

9.4.2.1. Selection of default OK-explanation codes

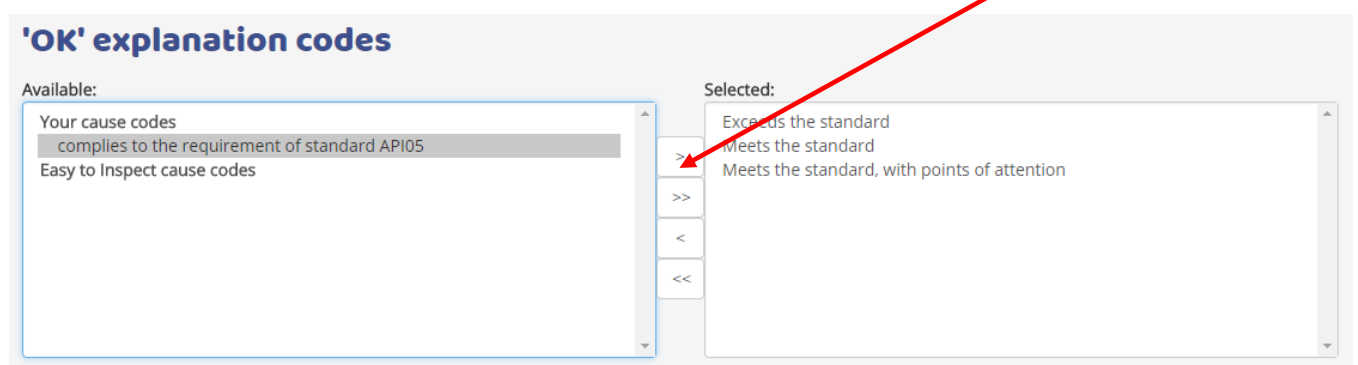
When you do want to get feedback from inspectors on causes, you have to determine which cause codes have to be used in the checklist.

When a new checklist is created, the default OK explanations, that have been predefined by Easy to inspect, are included in the checklist.

You can:

- ✔ deselect one or multiple explanations
- ✔ add one or multiple your explanations
- ✔ combine Easy to Inspects explanations with own explanations

Just select the explanations you would like to select or deselect and press the arrow button.



'OK' explanation codes

Available:

- Your cause codes
- complies to the requirement of standard API05
- Easy to Inspect cause codes

Selected:

- Exceeds the standard
- Meets the standard
- Meets the standard, with points of attention

Buttons: >, >>, <, <<



'OK' explanation codes

Available:		Selected:
Your cause codes Easy to Inspect cause codes	> >> < <<	Exceeds the standard Meets the standard Meets the standard, with points of attention complies to the requirement of standard API05

The result of this action will be that the selected set of explanations will be available in all the checklist questions that require a OK/NOK/N.A. answer in case of an OK answer. However you have to enable the function per inspection point in your checklist (see 9.6.2.1.1.2).

If a specific OK-explanation code has to be added, follow the instructions of chapter 7.

9.4.3. Select N.A.-explanation codes

It might be that you would like to eliminate any confusion about the interpretation of the inspection results. Especially in case of Not Applicable answers. So, if an N.A. answer is given, you might want to know if the activity did not take place, or that the activity simply has not been evaluated.

For that reason 'N.A.'-explanations are included in the system. It is not mandatory to use N.A.-explanation codes in case of N.A. answers. When you create your inspection questions you can select if you require the use of this option. When you create a new checklist, the use of N.A.-explanations is disabled. Enabling can be done in TAB 'Sections & Questions' (see 9.6.2.1.4).

Furthermore you have another option in selecting the N.A.-explanatory codes:

- a) Select a set of cause codes that are default for all checklist questions (see 9.4.3.1).
- b) Select a set of cause codes per question (see 9.6.2.1.1.2)

Notice: Even if you select default cause codes for all questions, it is always possible to change this set of cause codes per individual checklist question (see 9.6.2.1.1.2).

9.4.3.1. Selection of default N.A.-explanation codes

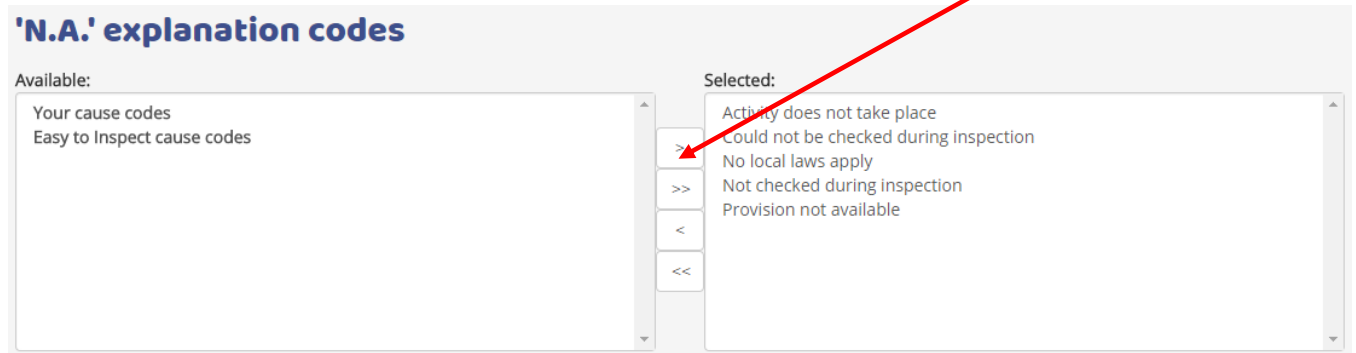
When you would like to get feedback from inspectors on causes, you have to determine which cause codes have to be used in the checklist.

When a new checklist is created, the default N.A.-explanations, that have been predefined by Easy to inspect, are included in the checklist.

You can:

- ✔ deselect one or multiple explanations
- ✔ add one or multiple your explanations
- ✔ combine Easy to Inspects explanations with own explanations

Just select the explanations you would like to select or deselect and press the arrow button.



The result of this action will be that the selected set of explanations will be available in all the checklist questions that require a OK/NOK/N.A. answer in case of a N.A.-answer. However you have to enable the function per inspection point in your checklist (see 9.6.2.1.1.2).

If a specific N.A.-explanation code has to be added, follow the instructions of chapter 8.

9.5. Introduction part of your checklist

The introduction section of a checklist contains:

- ✔ The inspection date
- ✔ The name of the inspector
- ✔ An option to include a reference (to easily retrieve your checklist later)
- ✔ Filters
- ✔ Options to include general questions.

The inspection date is a default item in the checklist and will be included automatically.

The name of the inspector is a default item in the checklist and will be included automatically.

Never include the inspection points in the introduction part of your checklist. You must use the next step in our wizzard “Questions” include a “Section” and link questions to a section. Questionnaires without a section with linked questions cannot be published and used.



9.5.1. Select your filters

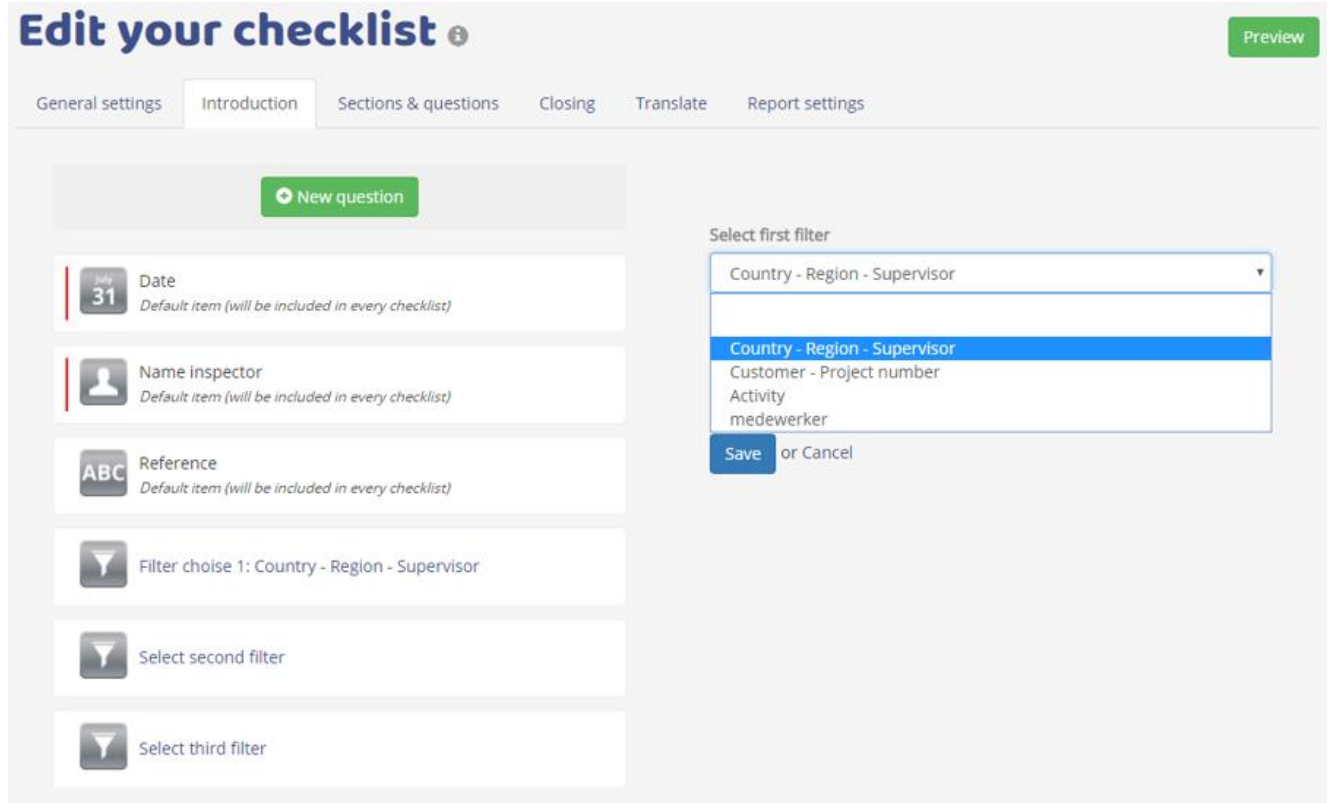
Edit your checklist ⓘ Preview

General settings | Introduction | Sections & questions | Closing | Translate | Report settings

+ New question

- July 31 **Date**
Default item (will be included in every checklist)
- [Person Icon] **Name inspector**
Default item (will be included in every checklist)
- ABC **Reference**
Default item (will be included in every checklist)
- [Filter Icon] **Select first filter**
- [Filter Icon] **Select second filter**
- [Filter Icon] **Select third filter**

Select the filter you would like to include by clicking the **'select first filter'** field. Then select the filter from the drop down menu.



When you selected a filter, the subfilters will be selected automatically. So if you would only use a country selection, and not the region you have to create a new filter first in which only countries are included. Press save after selecting.

In your checklist, the filter label name will be displayed as the question. The inspector can select the pre-set filter values from a scroll down menu in the App.

After you have done so, you can select 2 more filters.

And of course, you can always undo your filter, by selecting the blank field.

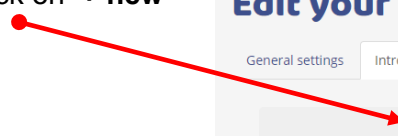


9.5.2 Create general questions in the introduction of your checklist

It is possible to include additional general questions in the introduction of your checklist. Be aware of the fact that these questions should only focus on general aspects of the inspection. Such as site/location, project numbers, equipment identification, names of people involved, weather conditions etc. The factual inspection points must be included in the question part of the checklist. There you can include the questions that are included in your analyses.

Note: Easy to Inspect can be used on mobile devices. This might be either a tablet or a smart phone. Remember that the screen size of a smart phone is restricted. So, keep your text as short as possible!

To create a new general question click on **'+ new question'**.



At the right side of your screen the new question pops up:

my checklists / new checklist Help me

Edit your checklist Preview

General settings | Introduction | Questions | Closing | Translate | Report settings

+ New question

July 31

Date

Default item (will be included in every checklist)

Name

Name inspector

Default item (will be included in every checklist)

ABC

Reference

Default item (will be included in every checklist)

Filter

Select first filter

Filter

Select second filter

Filter

Select third filter

Type of question

short answer ▼

Name

Name of new question

Explanation

Here you can explain your question or include inspection criteria.

(Optional) link to webpage (URL, https required)

https://www.examplepage.com

Prefix Suffix

Mandatory

Yes
No

Save or Cancel

In the introduction part of your checklist you can choose from different types of questions.

As you can see, it is impossible to select the OK/NOK/N.A. & score with a percentage question types. These types of questions can only be used in the actual inspection part of the questionnaire.

An explanation about the types of questions can be found in chapter 3.

Type of question

short answer ▼

- Yes-No
- drop-down list / multiple choice
- short answer
- long answer
- number
- date
- location (GPS positioning)
- signature field

(Optional) link to webpage (URL, https required)

https://www.examplepage.com

Prefix Suffix

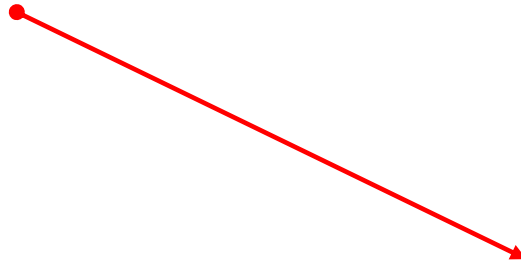
Mandatory

Yes
No

Save or Cancel



You can now select a type of question, include a prefix or suffix in case of drop down list / multiple choice questions.



Type of question
short answer

Name
Name of new question

Explanation
Here you can explain your question or include inspection criteria.

(Optional) link to webpage (URL, https required)
https://www.examplepage.com

Prefix
Suffix

Mandatory
Yes

Save or Cancel

In the explanation field you can describe what you expect from an inspector. Or you can give example about how to evaluate a specific inspection item. In some cases this is not sufficient. You would like to refer to user guides, photo material, instruction movies etc. You can therefore include a link to a webpage per question. The inspector will see a question mark in the App per question where this link will be displayed. Of course, this feature only works when an inspector has internet access during the inspection.



Type of question
short answer

Name
Name of new question

Explanation
Here you can explain your question or include inspection criteria.

(Optional) link to webpage (URL, https required)
https://www.examplepage.com

Prefix
Suffix

Mandatory
Yes

Save or Cancel










After saving, the question will be added to your general introduction questions

Edit your checklist +

General settings Introduction Questions Closing Translate Report settings Preview

New question

-  **Date**
Default item (will be included in every checklist)
-  **Name inspector**
Default item (will be included in every checklist)
-  **Reference**
Default item (will be included in every checklist)
-  **Select first filter**
-  **Select second filter**
-  **Select third filter**
-  **Outside temperature (100)**
Please indicate the outside temperature during the inspection.

9.6. Sections and Questions

Your actual checkpoints must be included in the Questions part of your checklist.

In this question part, you first define a section (compare with chapter) and per section you can define your questions/inspection points. It is not possible to generate questions without generating a section first.

9.6.1. Sections

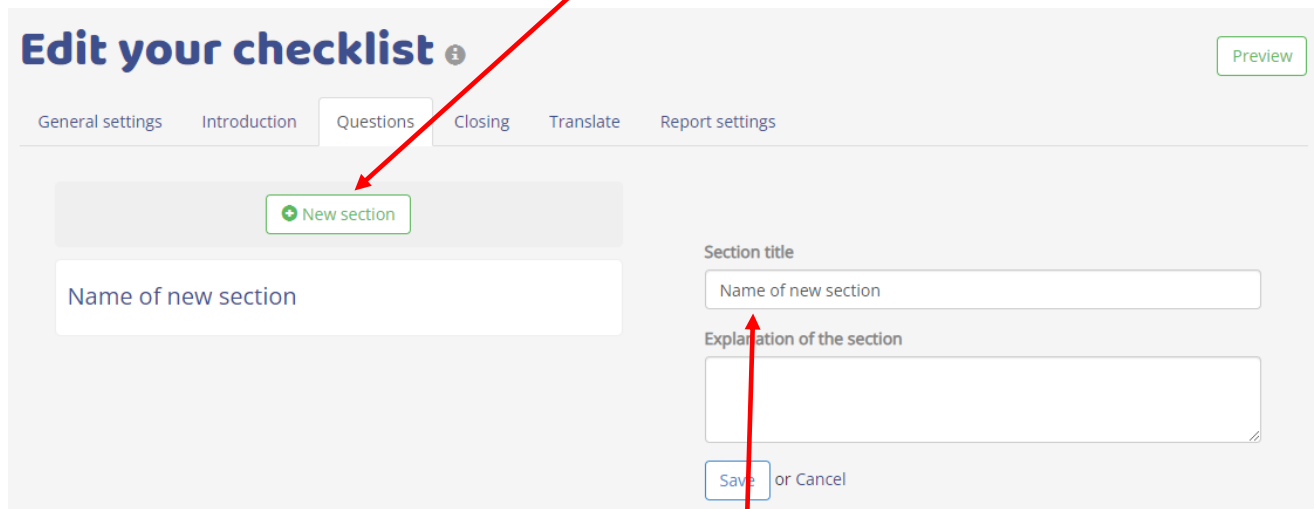
You might want to include for example 20 questions of which 8 belong to the office and 12 belong to the factory. In that case you can create 2 Sections to cluster your questions.

Notice: Also when you your checklist contains only 3 questions, you must create a section and link the 3 questions to this section. In such cases you can for instance name your section 'checkpoints'.

9.6.1.1. Create a section

All questions always must be linked to a section. Even if you only use 1 section in your checklist. So, the first section is already displayed.

Move your mouse pointer to the text **'Name of new section'** and click on it.



The screenshot shows the 'Edit your checklist' interface with the 'Questions' tab selected. A 'New section' button is visible. Below it, a form is displayed with the following fields:

- Section title:** A text input field containing 'Name of new section'.
- Explanation of the section:** A text area for providing details about the section.
- Buttons:** 'Save' and 'Cancel' buttons.

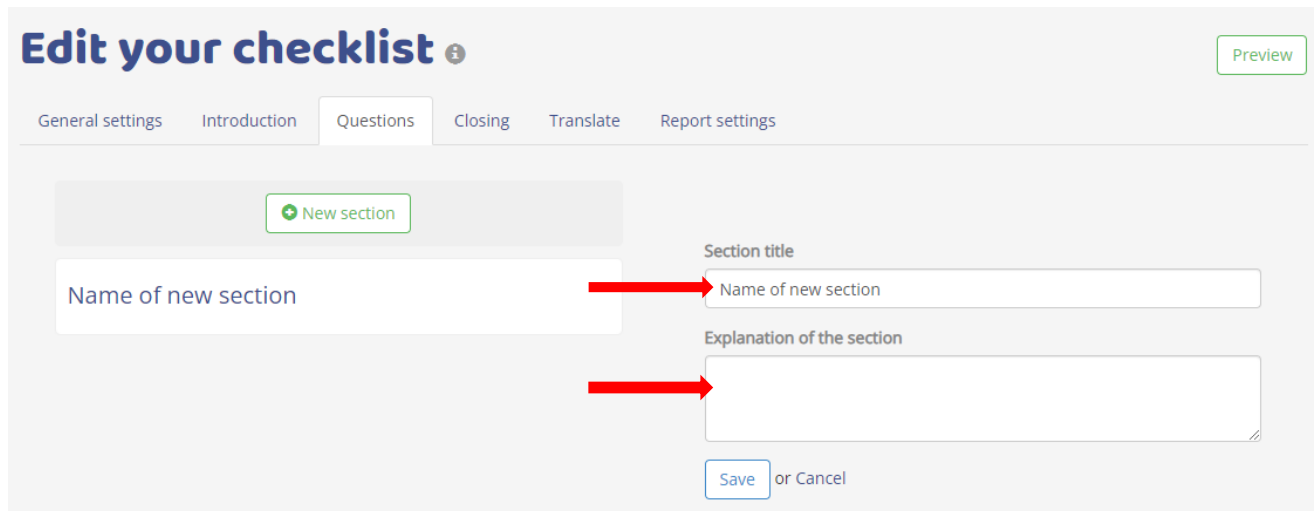
Red arrows in the image indicate that the text 'Name of new section' in the 'Section title' field is clickable and that the 'Save' button is also clickable.

You can now type the section name in the field section.

You can also include an explanation of the section.

This explanation is not automatically displayed in the App during the inspection. However, it can be displayed in the App via the App's setting menu.

Furthermore, the Section explanation will be included in the inspection report which can help to clarify or explain for persons that receive the inspection report. So, if you desire, you can add some extra information to explain the meaning of the section or add other relevant section information.



Edit your checklist ⌵ Preview

General settings Introduction **Questions** Closing Translate Report settings

+ New section

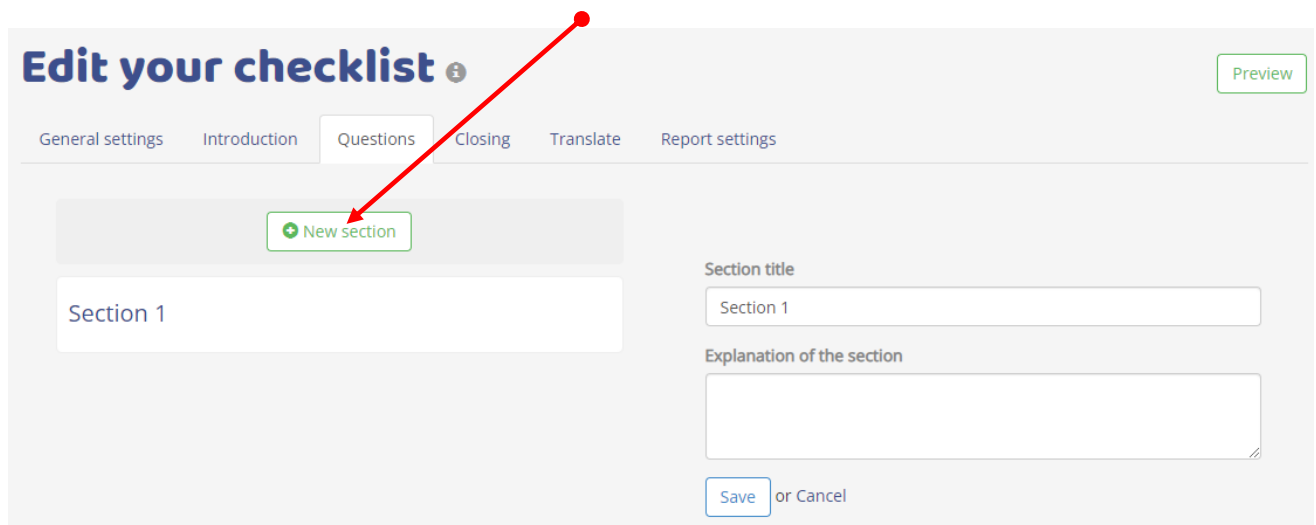
Name of new section

Section title
Name of new section

Explanation of the section

Save or Cancel

To create another section, you press the **'+ new section'** button.



Edit your checklist ⌵ Preview

General settings Introduction **Questions** Closing Translate Report settings

+ New section

Section 1

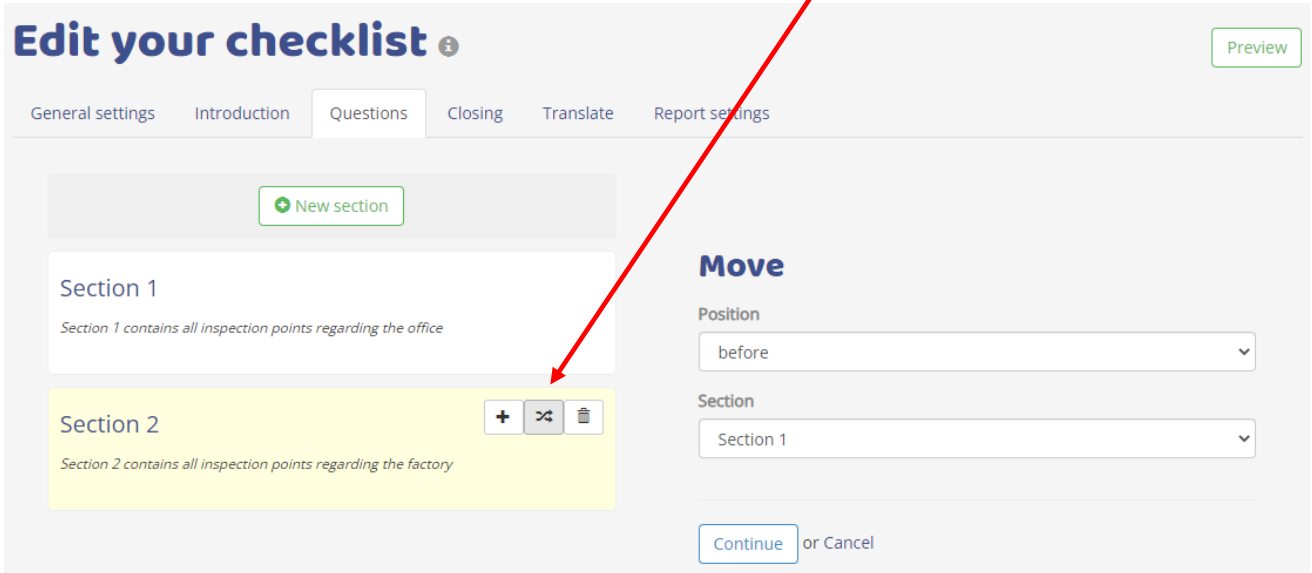
Section title
Section 1

Explanation of the section

Save or Cancel

9.6.1.2. Move a section

If you would like to change the order of sections, you click the **‘transfer’** button. This button will be displayed when you move your mouse pointer above a section field.

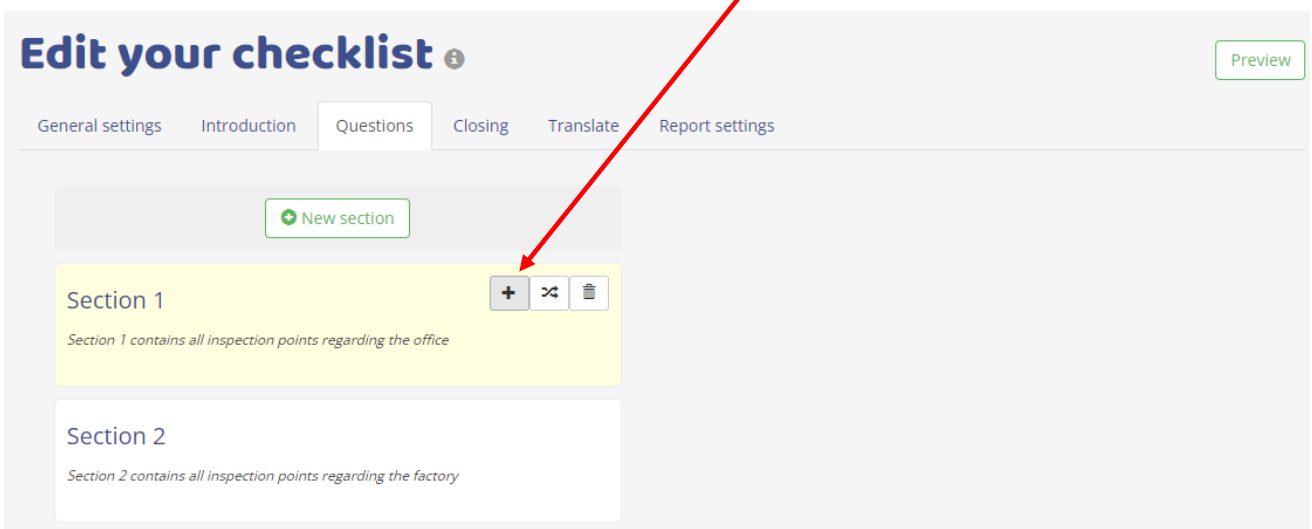


The screenshot shows the 'Edit your checklist' interface. The 'Questions' tab is active. A red arrow points from the 'transfer' icon (two arrows pointing in opposite directions) on the right side of 'Section 2' to the 'Move' dialog box on the right. The dialog box has a title 'Move' and two dropdown menus: 'Position' (set to 'before') and 'Section' (set to 'Section 1'). At the bottom of the dialog are 'Continue' and 'Cancel' buttons. The main interface shows 'Section 1' and 'Section 2' with their respective descriptions. A 'New section' button is at the top left.

Once you clicked the button, a pop up will be shown at the right side and you can choose the correct position. Click continue to save your revised settings.

9.6.2. Create your own questions

The questions within a section contain the inspection questions. To add a question to a section, you move your mouse pointer to a section field and press the **‘+’** button



The screenshot shows the 'Edit your checklist' interface. A red arrow points from the '+' button on the right side of 'Section 1' to the text above. The main interface shows 'Section 1' and 'Section 2' with their respective descriptions. A 'New section' button is at the top left.

Notice: Easy to Inspect can be used on mobile devices. This might be either a tablet or a smart

phone. Remember that the screen size of a smart phone is restricted. So, keep your text as short as possible!

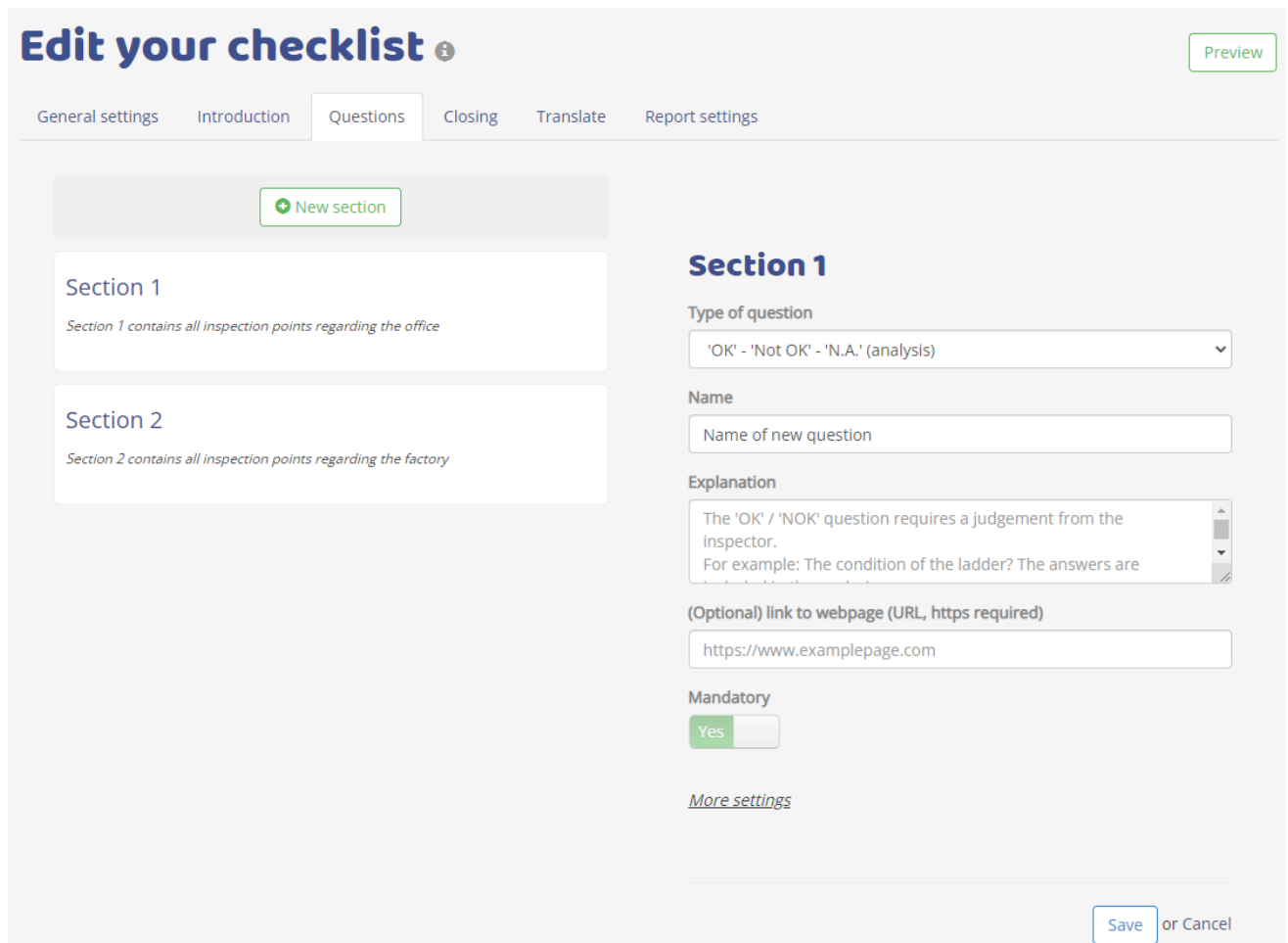
After filling in the text of the question, you can add a description. This description could contain an explanatory text or instruction for the inspector.

Note: The explanatory text is not displayed in the App automatically. This will only be displayed in the App, if the inspector selects the question by clicking on it. In the main menu in the App, only the questions are displayed. The questions should therefore be self-explanatory.

9.6.2.1. Create an OK/NOK/N.A. question

When new questions are created, the Easy to Inspect setting is to use an 'OK/NOK/N.A.' question as a default. This is, because the OK/NOK/N.A. type of question is included in the analysis (the 'score with percentage-question is too). It is the most important question together with the score with a percentage question and should be used as much as possible.

Notice: Do not confuse the OK/NOK/NA question with the Yes/No question. Yes/No questions must only be used for a factual finding. The finding itself should not result in an opinion if this is good or bad. If the opinion is important and the No-answer means not okay, use the OK/NOK/NA question type.



Edit your checklist Preview

General settings Introduction **Questions** Closing Translate Report settings

New section

Section 1
Section 1 contains all inspection points regarding the office

Section 2
Section 2 contains all inspection points regarding the factory

Section 1

Type of question
'OK' - 'Not OK' - 'N.A.' (analysis)

Name
Name of new question

Explanation
The 'OK' / 'NOK' question requires a judgement from the inspector.
For example: The condition of the ladder? The answers are

(Optional) link to webpage (URL, https required)
https://www.examplepage.com

Mandatory
 Yes

[More settings](#)

Save or Cancel

After selecting '+' you can simply fill in the question itself as well as an explanatory field to include specific elements that should be part of the inspection, inspection criteria etc. The explanatory field is also visible for the inspector in the APP.

Notice: Easy to Inspect can be used on mobile devices. This might be either a tablet or a smart phone. Remember that the screen size of a smart phone is restricted. So, keep your text as short as possible!

Notice: The explanatory text is not displayed in the App by default. This will only be displayed in the App, if the inspector selects the question by clicking on it or if the inspector has changed the settings in the App such that he/she will always see the explanation. In the main menu in the App, only the questions are displayed by default. The questions should therefore be self-explanatory.

All OK/NOK/N.A. questions are mandatory. This means that the inspector must fill in the question before the checklist results can be finalised.

9.6.2.1.1. More settings within OK/NOK/N.A. question

When you created your checklist, you defined default settings that apply to the entire checklist. Now, you can change your settings for individual questions.

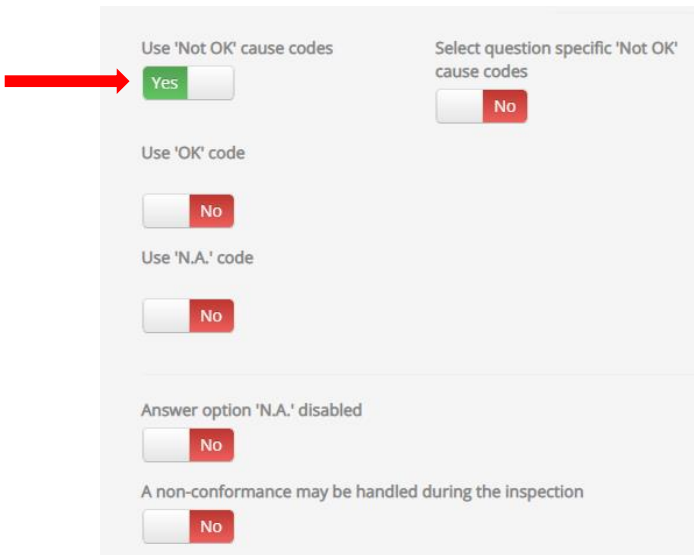
9.6.2.1.1.1. Apply OK/NOK/N.A. causes & explanations

As a default, inspectors are required to fill in a NOK-cause when carrying out the inspection. This enables in depth analyses.

Options you have are:

- Use 'Not OK' causes
- Use 'OK' explanation codes
- Use 'N.A.' explanation codes

You simply move the selector to the desired setting which will be clearly indicated:



Use 'Not OK' cause codes Yes

Select question specific 'Not OK' cause codes No

Use 'OK' code No

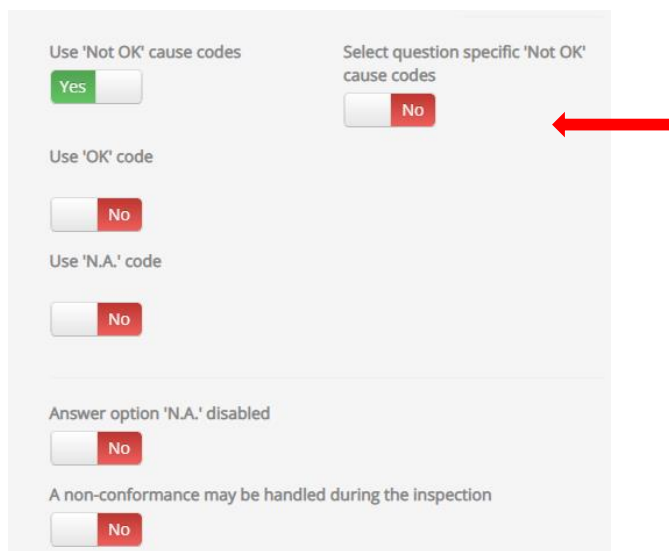
Use 'N.A.' code No

Answer option 'N.A.' disabled No

A non-conformance may be handled during the inspection No

9.6.2.1.1.2. Apply question specific OK/NOK/N.A. causes & explanations

Furthermore, you can change the cause codes or explanation codes per inspection point/question. When you created your checklist, you defined the codes as a default for the entire checklist. Now you can change your default settings for individual checklist questions/inspection points.



Use 'Not OK' cause codes Yes

Select question specific 'Not OK' cause codes No

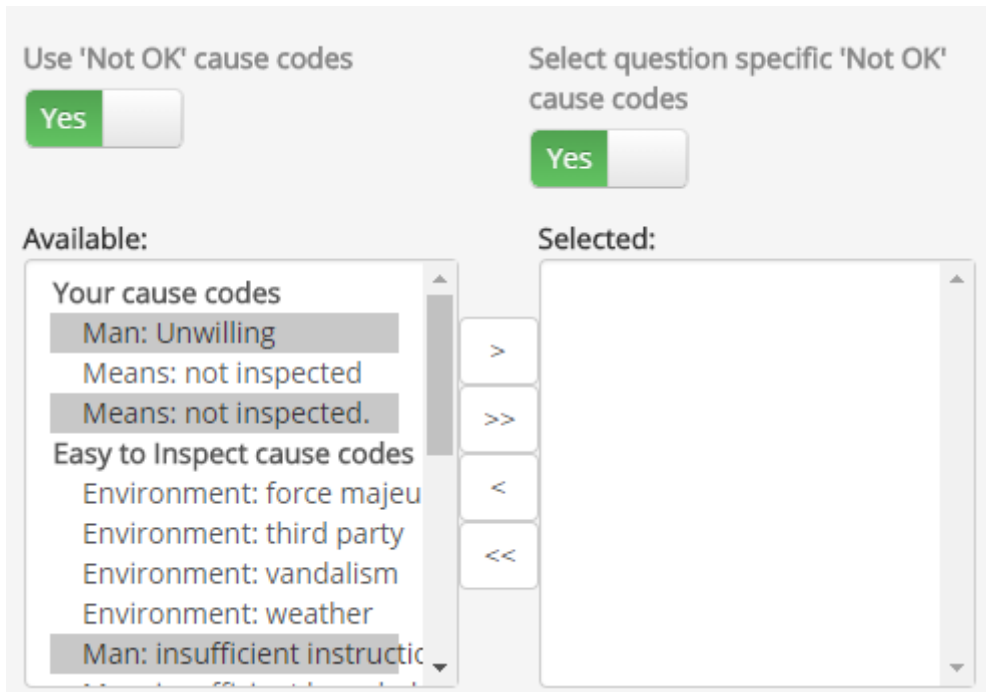
Use 'OK' code No

Use 'N.A.' code No

Answer option 'N.A.' disabled No

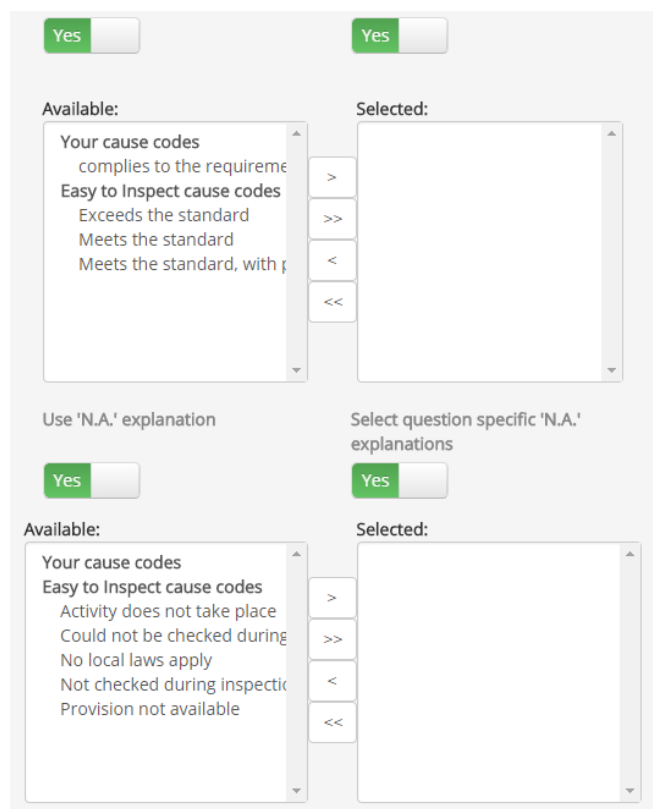
A non-conformance may be handled during the inspection No

You then can change all the causes you would like to be available for this question. Note that you always select the 'unknown' option. You can combine your cause codes with Easy to Inspect cause codes.



Save your settings!

The same routine can be followed for OK-answer explanations as well as for Not Applicable justifications.



9.6.2.1.1.3. Disable N.A. answer option

In some cases, you as an administrator do not want inspectors to fill in N.A. as an answer. Because you know the activity takes place or to make sure that the inspection point is part of the inspection.

For those reasons, you can disable the N.A. answer option in the more settings screen per individual question.

+ New section

Section 1

Section 1 contains all inspection points regarding the office

Section 2

Section 2 contains all inspection points regarding the factory

Section 1

Type of question

Name

Explanation

(Optional) link to webpage (URL, https required)

Mandatory
 Yes

[Save](#) or [Cancel](#)

Use 'Not OK' cause codes
 Yes

Use 'OK' code
 Yes

Use 'N.A.' code
 Yes

Select question specific 'Not OK' cause codes
 No

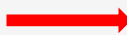
Select question specific 'OK' codes
 No

Select question specific 'N.A.' codes
 No

Answer option 'N.A.' disabled
 No

A non-conformance may be handled during the inspection
 No

Answer option 'N.A.' disabled
 Yes



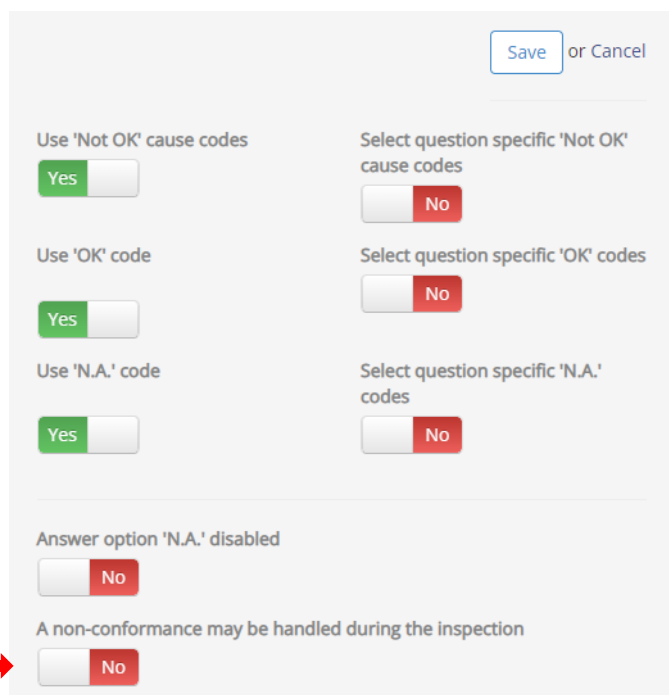
9.6.2.1.1.4. Enable/Disable NOK-completion option

In case of OK/NOK/N.A questions and the question type “scoring with a percentage”, as a default setting, a nonconformity report will be generated in case of a NOK answer.

When a nonconformance will be generated in case of the “scoring with a percentage”-question, is defined by the lower limit value. The lower limit value is the value which is still acceptable per question. This might be only 100% but also be 80% or 75% or any other value.

Some issues observed during an inspection can be dealt with easily. It is easy to replace a missing tool, cleanup a messy workspace, carry out a small repair. It is useful to mark the subject as Not OK during the inspection but in the meantime resolve the issue immediately. You still would like the inspector marking the subject as Not OK, for analysis and reporting purposes. If you allow inspectors to mark issues as completed during the inspection, a non-conformity report will be generated once the report is uploaded. However, a text field will be displayed in the report (“action completed during the inspection”). The nonconformity report generated will be marked as completed and needs no further attention later.

In the general setting part of your checklist, you can select if you would like to use this feature. You can modify settings per individual question.



Save or Cancel

Use 'Not OK' cause codes
 Yes

Use 'OK' code
 Yes

Use 'N.A.' code
 Yes

Select question specific 'Not OK' cause codes
 No

Select question specific 'OK' codes
 No

Select question specific 'N.A.' codes
 No

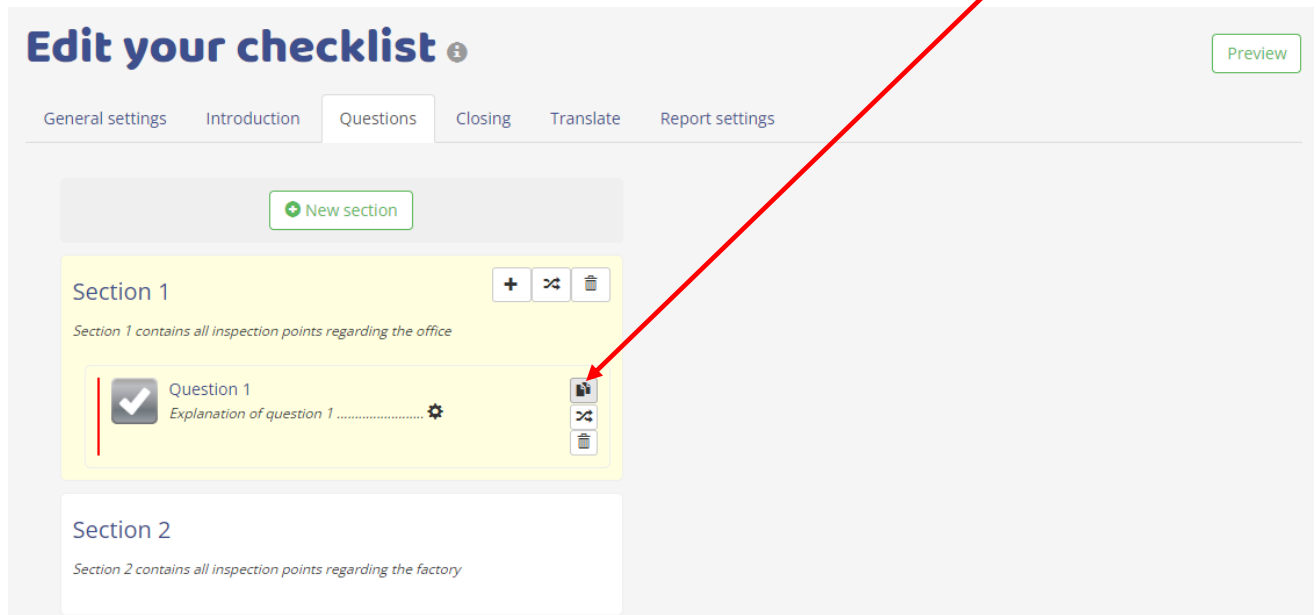
Answer option 'N.A.' disabled
 No


A non-conformance may be handled during the inspection
 No

9.6.2.1.2. Copying questions

Add more checklist-questions by repeating the previous steps. You might however copy an existing question with the customised settings you prefer.

Select the question with settings that you would like to copy and click the '**copy**' box.







Edit your checklist  Preview

General settings Introduction Questions Closing Translate Report settings

+ New section

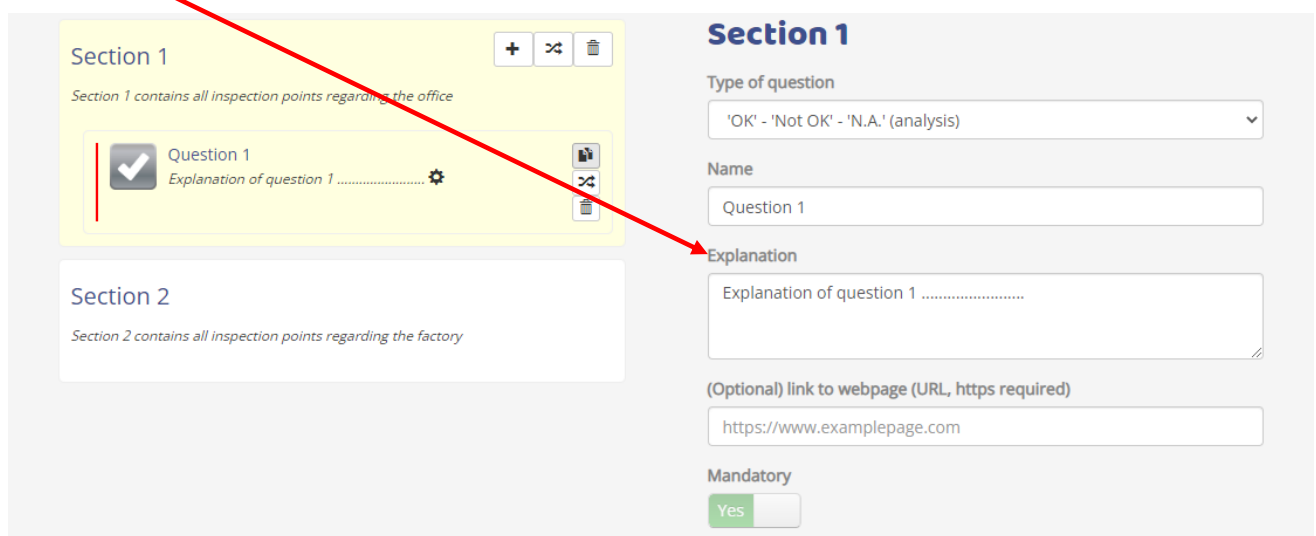
Section 1 + \times \times \times
Section 1 contains all inspection points regarding the office

Question 1
Explanation of question 1 


  




Section 2
Section 2 contains all inspection points regarding the factory

A new question will be shown at the right, with all the settings of the question you just copied. **Rename** and change the explanation and save your question.




Section 1 + \times \times \times
Section 1 contains all inspection points regarding the office

Question 1
Explanation of question 1 

Section 2
Section 2 contains all inspection points regarding the factory

Section 1

Type of question
'OK' - 'Not OK' - 'N.A.' (analysis) 

Name
Question 1

Explanation
Explanation of question 1

(Optional) link to webpage (URL, https required)
<https://www.examplepage.com>

Mandatory
 Yes



Edit your checklist ⓘ

Preview

General settings Introduction Questions Closing Translate Report settings

[+ New section](#)

Section 1

Section 1 contains all inspection points regarding the office

Question 1
Explanation of question 1 ⚙

Question 2
Explanation of question 2 ⚙

Section 2

Section 2 contains all inspection points regarding the factory

9.6.2.1.3. Create an OK/NOK/N.A. subsequent question

In some cases, you would like to have extra information on the answer.

You might need an extra explanation or just would like to have a value statement of the inspector. For instance, in case of a NOK-answer. This black and white answer could be clarified by adding a subjective evaluation of the inspector by for instance scoring with a percentage of non-compliance.

Select a type of subsequent question you would like to use:



Section 1

Section 1 contains all inspection points regarding the office

- Question 1
Explanation of question 1
- Question 2
Explanation of question 2

Section 2

Section 2 contains all inspection points regarding the factory

Section 1

Type of question
'OK' - 'Not OK' - 'N.A.' (analysis)

Name
Question 2

Explanation
Explanation of question 2

(Optional) link to webpage (URL, https required)
https://www.examplepage.com

Mandatory
 Yes

[Less settings](#)

or

Use 'Not OK' cause codes
 Yes

Select question specific 'Not OK' cause codes
 No

Use 'OK' code
 Yes

Select question specific 'OK' codes
 No

Use 'N.A.' code
 Yes

Select question specific 'N.A.' codes
 No

Answer option 'N.A.' disabled
 No

A non-conformance may be handled during the inspection
 No

Kind of subsequent question
[Dropdown menu]



Select your subsequent type of question

Kind of follow-up question

[Dropdown menu]

- Yes-No
- drop-down list / multiple choice
- short answer
- number
- date



For instance: drop down list / multiple choice

Kind of follow-up question
drop-down list / multiple choice

Subsequent question
Percentage of non compliance

Explanation
Please apply your professional judgement and include a percentage of overall non compliance

Then define if you would like to use a prefix or a suffix. In this example a suffix would be useful.

Prefix

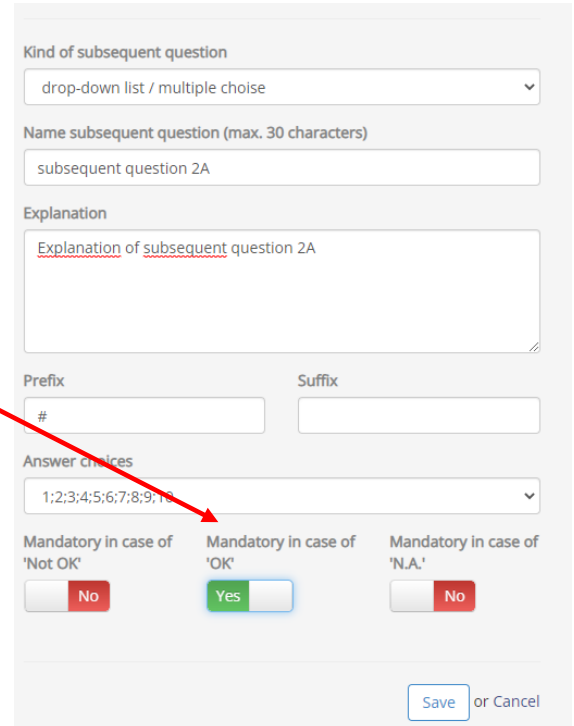
Suffix

Then select your drop-down list

1;2;3
1;2;3;4
1;2;3;4;5
1;2;3;4;5;6
1;2;3;4;5;6;7
1;2;3;4;5;6;7;8
1;2;3;4;5;6;7;8;9
1;2;3;4;5;6;7;8;9;10
1;2;3;4;5;6;7;8;9;10;11
25;50;75;100
20;40;60;80;100
10;20;30;40;50;60;70;80;90;100
0;1;2;3
0;1;2;3;4
0;1;2;3;4;5
0;1;2;3;4;5;6
0;1;2;3;4;5;6;7
0;1;2;3;4;5;6;7;8
0;1;2;3;4;5;6;7;8;9
0;1;2;3;4;5;6;7;8;9;10

1;2;3

And mark if the subsequent question must be filled in in case of a Not OK answer, an OK answer or a N.A. answer. In this example we would like the inspector to use it in case of Not OK answers only.



Kind of subsequent question
drop-down list / multiple choice

Name subsequent question (max. 30 characters)
subsequent question 2A

Explanation
Explanation of subsequent question 2A

Prefix # Suffix

Answer choices
1;2;3;4;5;6;7;8;9;10

Mandatory in case of 'Not OK' No Yes No

Mandatory in case of 'OK' No Yes No


Mandatory in case of 'N.A.' No Yes No

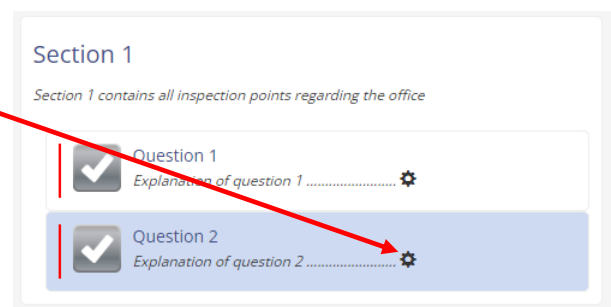
Save or Cancel

Of course, you can also select other types of subsequent questions. Since the functioning is already explained in chapter 3.1, we refer to that chapters for explanation.


Notice: We have a better solution for this feature in case of using a percentage as clarification. In such cases, you better use our 'score with a percentage' question type.


9.6.2.1.4. Displaying checklist questions with individual settings

Questions with customised settings (that vary from the default settings that you have chosen in step 1 of the Wizard: "General settings") can easily be retrieved in your checklist editor. They are marked with a settings label .



Section 1
Section 1 contains all inspection points regarding the office

Question 1
Explanation of question 1 

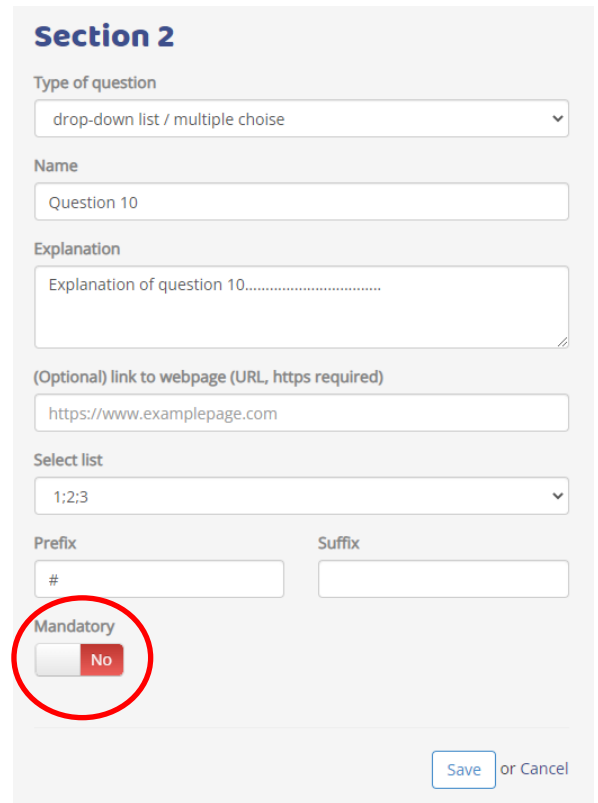
Question 2
Explanation of question 2 

9.6.2.1.5. Marking questions as mandatory

All OK/NOK/N.A. & Score with a percentage questions are always mandatory. The other question types can be defined to be mandatory or non-mandatory. In case of mandatory questions, the inspector can first finalise the inspection result after all mandatory questions have been filled in.

Per question you find a mandatory selector at the bottom of the question details.

Save your settings upon completion.



Section 2

Type of question
drop-down list / multiple choice

Name
Question 10

Explanation
Explanation of question 10.....

(Optional) link to webpage (URL, https required)
https://www.examplepage.com

Select list
1;2;3


Prefix
#

Suffix

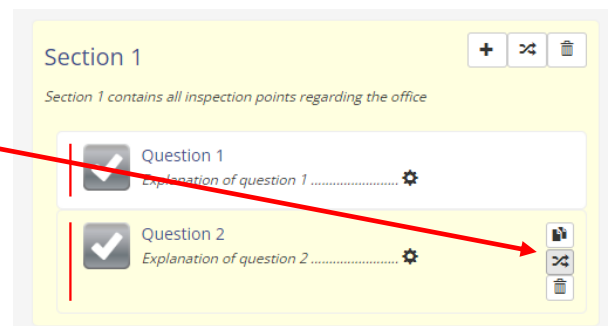
Mandatory
 No




Save or Cancel

9.6.2.1.6. Move a question to another position in the checklist

Move your mouse pointer to the question box and click on the transfer  button.

You can move a question within a section to other positions by selecting before or after which question, the selected question must be located.






Section 1   

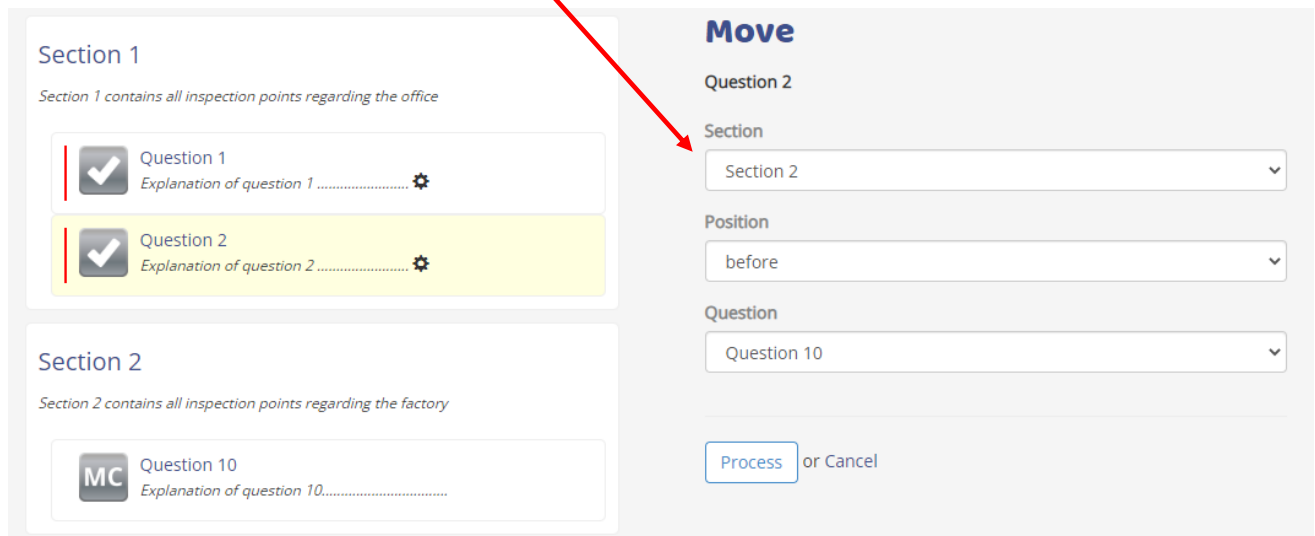
Section 1 contains all inspection points regarding the office

Question 1
Explanation of question 1 ⚙️

Question 2
Explanation of question 2 ⚙️

You can also move your question to another section in the same way.



Move

Question 2

Section
Section 2

Position
before

Question
Question 10

Process or Cancel



Section 1
Section 1 contains all inspection points regarding the office

Question 1
Explanation of question 1

Section 2
Section 2 contains all inspection points regarding the factory

Question 2
Explanation of question 2

MC Question 10
Explanation of question 10.....

9.6.2.2. Create a Score with percentage (5S) question

The scoring with percentage question type, offers the option to give a judgement about the extent to which the requirements are met.

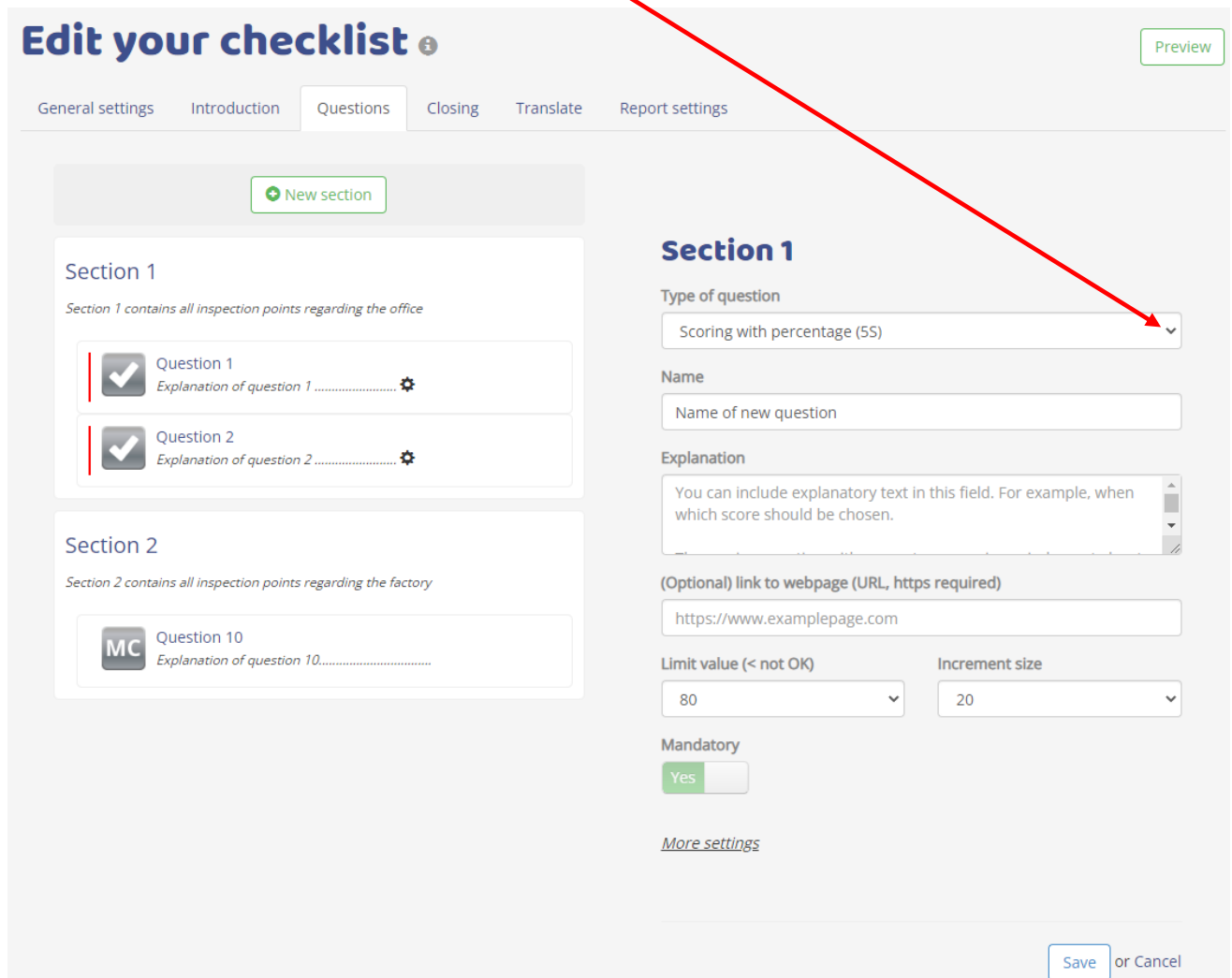
For example, 100% or 60%.

It is possible to include a lower limit. If scoring is applied below the limit, the easy to inspect system will categorise the answer as unsatisfactory. A nonconformity report will be generated when the inspection report is finalised.

This question type offers the option to set your own increment/steps so you can customise completely.

These questions are commonly used in 5S audits.

Add a new question and select the “scoring with percentage (5S)” question type.



Edit your checklist + Preview

General settings Introduction **Questions** Closing Translate Report settings

+ New section

Section 1
Section 1 contains all inspection points regarding the office

- Question 1
Explanation of question 1
- Question 2
Explanation of question 2

Section 2
Section 2 contains all inspection points regarding the factory

- MC Question 10
Explanation of question 10.....

Section 1

Type of question
Scoring with percentage (5S)

Name
Name of new question

Explanation
You can include explanatory text in this field. For example, when which score should be chosen.

(Optional) link to webpage (URL, https required)
https://www.examplepage.com

Limit value (< not OK) 80 Increment size 20

Mandatory
 Yes

[More settings](#)

Save or Cancel



Fill the field “Name of the new question” with your question.

Add your explanation. For instance, ad how the scoring must be applied. When does the inspection score 100% and when must he score 80, 60, 40, 20%?

Set your limit value: This value indicates the lowest score that is acceptable. The increment size defines the steps in answering options (like 10, 20, 25).

When you select 25, the scoring options will be: 100, 75, 50, 25 and 0.

When you set the limit value as 75, all answers below 75 are a nonconformance. The answer 75 will marked as OK.

When you click on more settings, you have the option to define OK, NOK and NA explanations. The use is optional (see chapter 9.7.2).

Section 1

Type of question
Scoring with percentage (5S)

Name
Question 3

Explanation
You can include explanatory text in this field. For example, when which score should be chosen.

(Optional) link to webpage (URL, https required)
https://www.examplepage.com

Limit value (< not OK) Increment size
80 20

Mandatory
 Yes

[More settings](#)

Save or Cancel

9.6.2.3. Create a Yes/No question

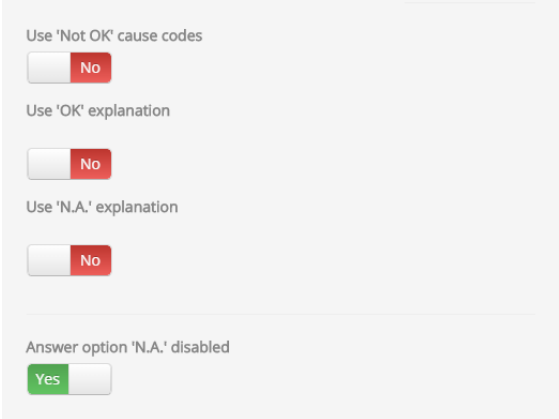
The Yes / No question must not be mixed up with the OK/NOK/N.A. question. The OK/NOK/N.A. question is meant for a professional evaluation. The OK/NOK/N.A. question type will be included in the checklist analysis. The Yes/No type of question is meant only for factual status reporting. It can for example be used in surveys.

For instance: Would you like to have more days off? The answer is Yes or No. You don't answer with OK/NOK.

Yes and No answers can only be included in analyses if you subscribe to our API feature and create your own BI-dashboard.

If you would carry out a survey and would like to analyse the outcome of the survey, you better use the OK/NOK/N.A. type of questions. You must modify the question settings (under more settings) as follows:

- Disable the NOK cause code (you don't want to enter causes in case of NO answers)
- Disable the answer option 'Not Applicable' (you don't want to skip questions)



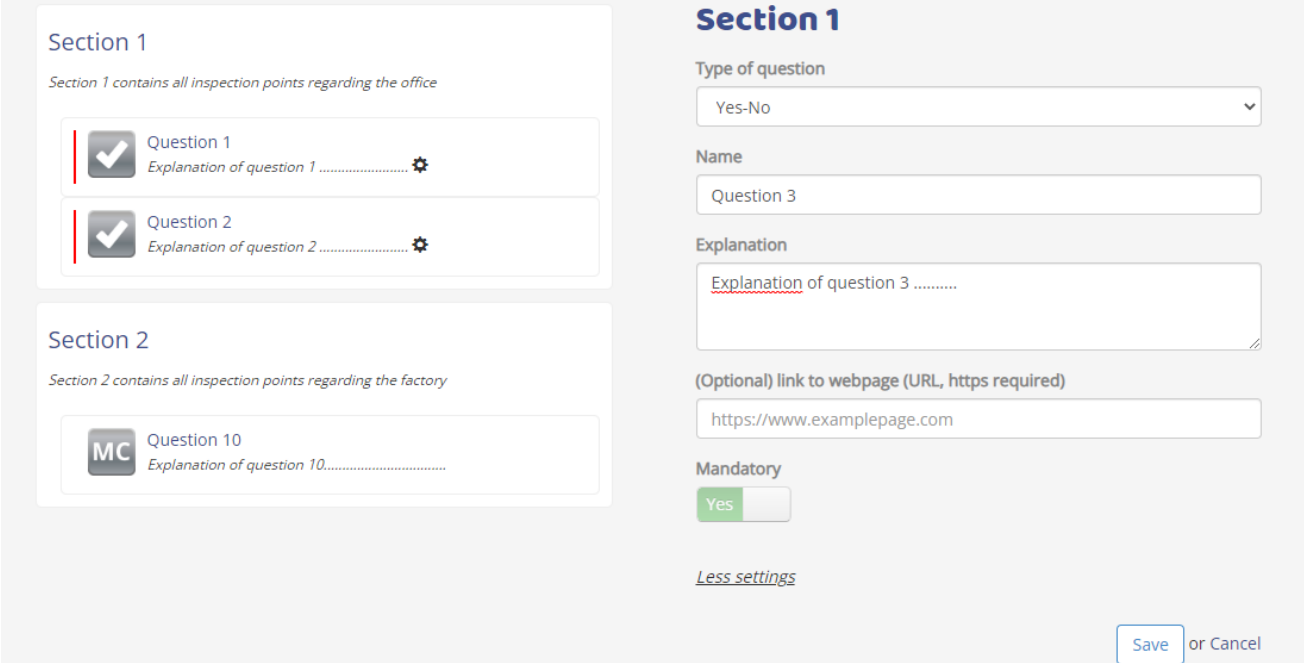
Use 'Not OK' cause codes
 No

Use 'OK' explanation
 No

Use 'N.A.' explanation
 No

Answer option 'N.A.' disabled
 Yes

To create a Yes/No question simply select the Yes-No type of question. Fill in the question text and if applicable an explanation of the intention of the question. Save your question!



Section 1
Section 1 contains all inspection points regarding the office

- Question 1
Explanation of question 1
- Question 2
Explanation of question 2

Section 2
Section 2 contains all inspection points regarding the factory

- MC Question 10
Explanation of question 10.....

Section 1

Type of question
Yes-No

Name
Question 3

Explanation
Explanation of question 3

(Optional) link to webpage (URL, https required)
https://www.examplepage.com

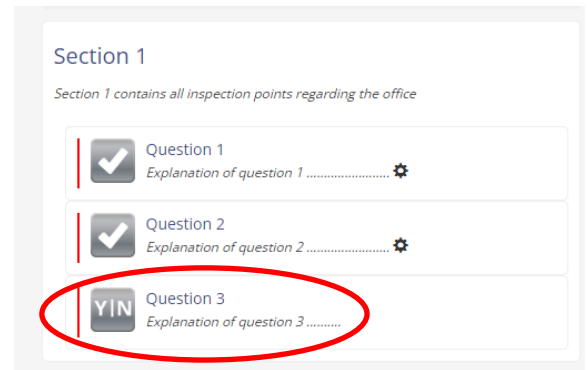
Mandatory
 Yes

[Less settings](#)

or

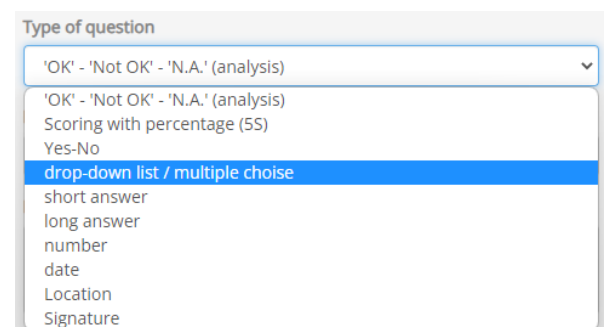
As a result, the type of question has been changed.

In this case, the question is mandatory.



9.6.2.4. Create a Drop down list / Multiple Choice question

Drop down list / Multiple Choice questions provide the option for the inspector to select answers in a predefined list. By adding prefixes or suffixes, you can report easily about currency, temperature, relative humidity, percentage, amount or scoring rates.





Select the drop-down list / multiple choice option.
Include your question and if you desire an explanation of the question for the inspector (or the reader of the report).

Then you select your list. You have multiple options you can choose from.

Include a prefix or suffix.

Save your settings upon completion.

Type of question
drop-down list / multiple choice

Name
Question 4

Explanation
Explanation of question 4

(Optional) link to webpage (URL, https required)
https://www.examplepage.com

Select list
32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53

Prefix

Suffix
°F

Mandatory
 Yes

Save or Cancel

The type of question is indicated in your overview.

<input checked="" type="checkbox"/>	Question 1 Explanation of question 1
%	Question 2 Explanation of question 2
YIN	Question 3 Explanation of question 3
MC	Question 4 Explanation of question 4
ABC	Question 5 Explanation of question
123	Question 6 Explanation of question 6
July 31	Question 7 Explanation of question 7
	Question 8 Explanation of question 8
	Question 9 Explanation of question 9



9.6.2.5. Create a text question: Short answer

Select the short answer question type from the scroll down menu.

Then fill in your question and your question explanation. If you desire, you can use a prefix or suffix.

Save your question after completion.

Type of question

- short answer
- 'OK' - 'Not OK' - 'N.A.' (analysis)
- Scoring with percentage (5S)
- Yes-No
- drop-down list / multiple choice
- short answer**
- long answer
- number
- date
- location (GPS positioning)
- signature field

Type of question

short answer

Name

Question 5

Explanation

Explanation of question

(Optional) link to webpage (URL, https required)

https://www.examplepage.com

Prefix

Suffix

Mandatory

No

Save or Cancel

9.6.2.6. Create a text question: Long Answer

Select the long answer question type from the scroll down menu.

Type of question

- long answer
- 'OK' - 'Not OK' - 'N.A.' (analysis)
- Scoring with percentage (5S)
- Yes-No
- drop-down list / multiple choice
- short answer
- long answer**
- number
- date
- location (GPS positioning)
- signature field



Then fill in your question and your question explanation.
If you desire, you can use a prefix or suffix.

Save your question after completion.

Type of question
number

Name
Question 5

Explanation
Explanation of question

(Optional) link to webpage (URL, https required)
https://www.examplepage.com

Prefix
Suffix

Mandatory
No

Save or Cancel

9.6.2.7. Create a numeric question

Select the numeric answer question type from the
scroll down menu.

Type of question
number

- 'OK' - 'Not OK' - 'N.A.' (analysis)
- Scoring with percentage (55)
- Yes-No
- drop-down list / multiple choice
- short answer
- long answer
- number**
- date
- Location
- Signature

Then fill in your question and your question explanation.
If you desire, you can use a prefix or suffix.

In the example your see the € currency as a prefix.

Save your question after completion.

Type of question
number

Name
Question 5

Explanation
Explanation of question

(Optional) link to webpage (URL, https required)
https://www.examplepage.com

Prefix
€

Suffix

Mandatory
No

Save or Cancel



9.6.2.8. Create a date question

Select the date answer question type from the scroll down menu.

Type of question

number

'OK' - 'Not OK' - 'N.A.' (analysis)
Scoring with percentage (5S)
Yes-No
drop-down list / multiple choice
short answer
long answer
number
date
Location
Signature

Then fill in your question and your question explanation.

Save your question after completion

Type of question

date

Name

Question 5

Explanation

Explanation of question

(Optional) link to webpage (URL, https required)

https://www.examplepage.com

Mandatory

Yes

Save or Cancel

9.6.2.9. Create a location question

Select the location question type from the scroll down menu.

Type of question

short answer

'OK' - 'Not OK' - 'N.A.' (analysis)
Scoring with percentage (5S)
Yes-No
drop-down list / multiple choice
short answer
long answer
number
date
Location
Signature



The location question will put in the GEO position as well as a time stamp in the checklist.

Note: this question type only works if used in the App on your smartphone or tablet.

Save your question after completion

The screenshot shows a form for creating a 'location (GPS positioning)' question. It includes a dropdown menu for 'Type of question' with 'location (GPS positioning)' selected. Below are text input fields for 'Name' (containing 'Question 5') and 'Explanation' (containing 'Explanation of question'). There is also a text input field for '(Optional) link to webpage (URL, https required)' with the value 'https://www.examplepage.com'. A 'Mandatory' section has a 'Yes' button that is currently selected. At the bottom right, there are 'Save' and 'Cancel' buttons.

9.6.2.10. Create a signature question

Select the signature question type from the scroll down menu. Although mostly used in the closing part of your checklist, the signature question can be applied everywhere in your checklist.

Fill in the description:

For instance; Name of the Lessor or Name of the Lessee, Name of the Inspector, Name of the Auditee.

This will be displayed in the checklist and a signature field will be displayed in the App.

Note: this question type only works if used in the App on your smartphone or tablet.

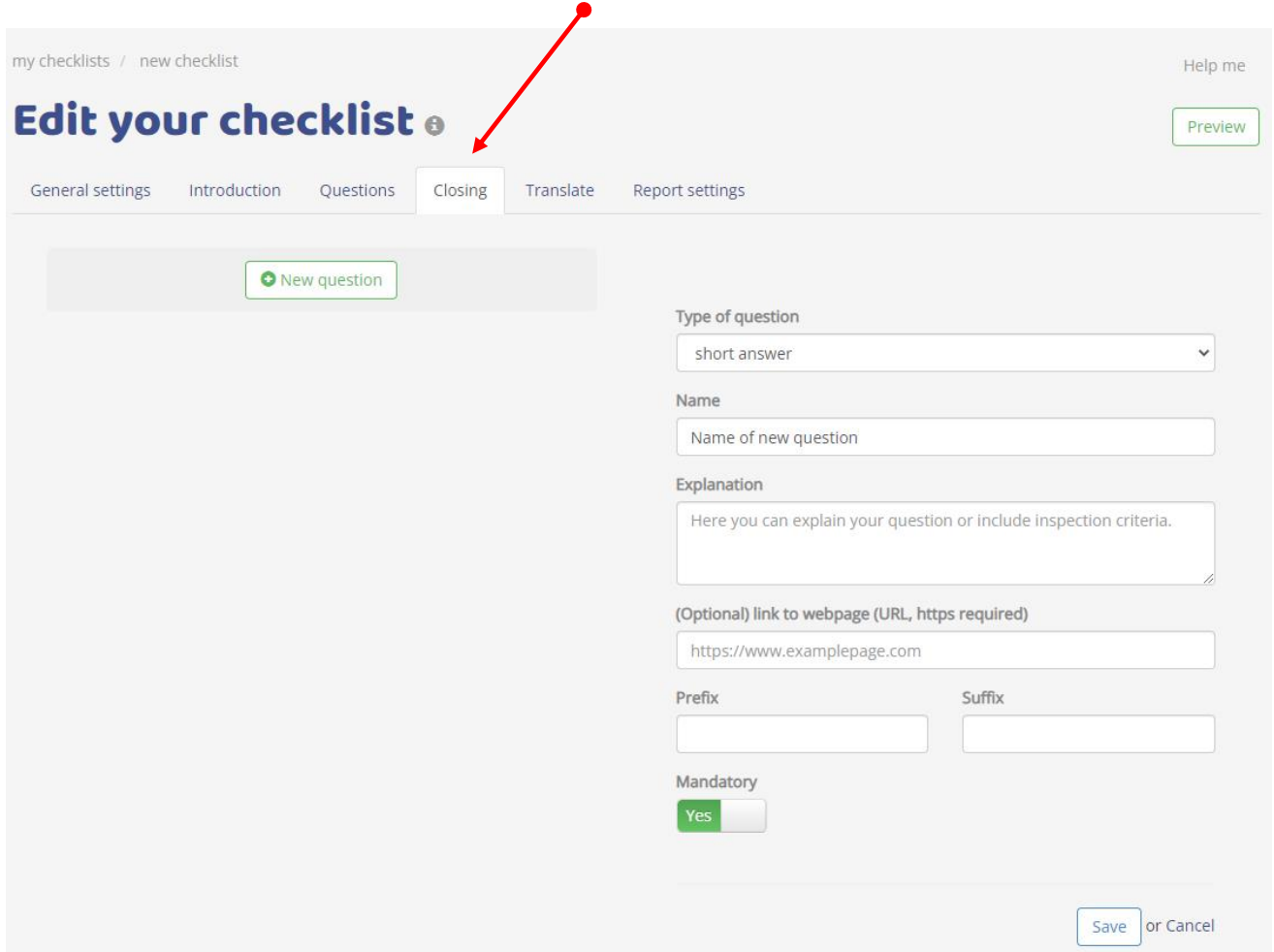
Save your question after completion

The screenshot shows a dropdown menu for selecting a question type. The 'number' type is currently selected. The menu lists several other options: 'OK' - 'Not OK' - 'N.A.' (analysis), 'Scoring with percentage (55)', 'Yes-No', 'drop-down list / multiple choice', 'short answer', 'long answer', 'number', 'date', 'Location', and 'Signature'. The 'Signature' option is highlighted in blue at the bottom of the list.

The screenshot shows a form for creating a 'signature field' question. It includes a dropdown menu for 'Type of question' with 'signature field' selected. Below are text input fields for 'Name' (containing 'Question 5') and 'Explanation' (containing 'Explanation of question'). There is also a text input field for '(Optional) link to webpage (URL, https required)' with the value 'https://www.examplepage.com'. A 'Mandatory' section has a 'Yes' button that is currently selected. At the bottom right, there are 'Save' and 'Cancel' buttons.

9.7. Closing

To finalise your checklist, you select the 'closing' tab in the checklist editor.



my checklists / new checklist Help me

Edit your checklist ⓘ

General settings Introduction Questions **Closing** Translate Report settings Preview

New question

Type of question
short answer

Name
Name of new question

Explanation
Here you can explain your question or include inspection criteria.

(Optional) link to webpage (URL, https required)
https://www.examplepage.com

Prefix Suffix

Mandatory
 Yes

Save or Cancel

9.7.1. Additional questions in the closing section

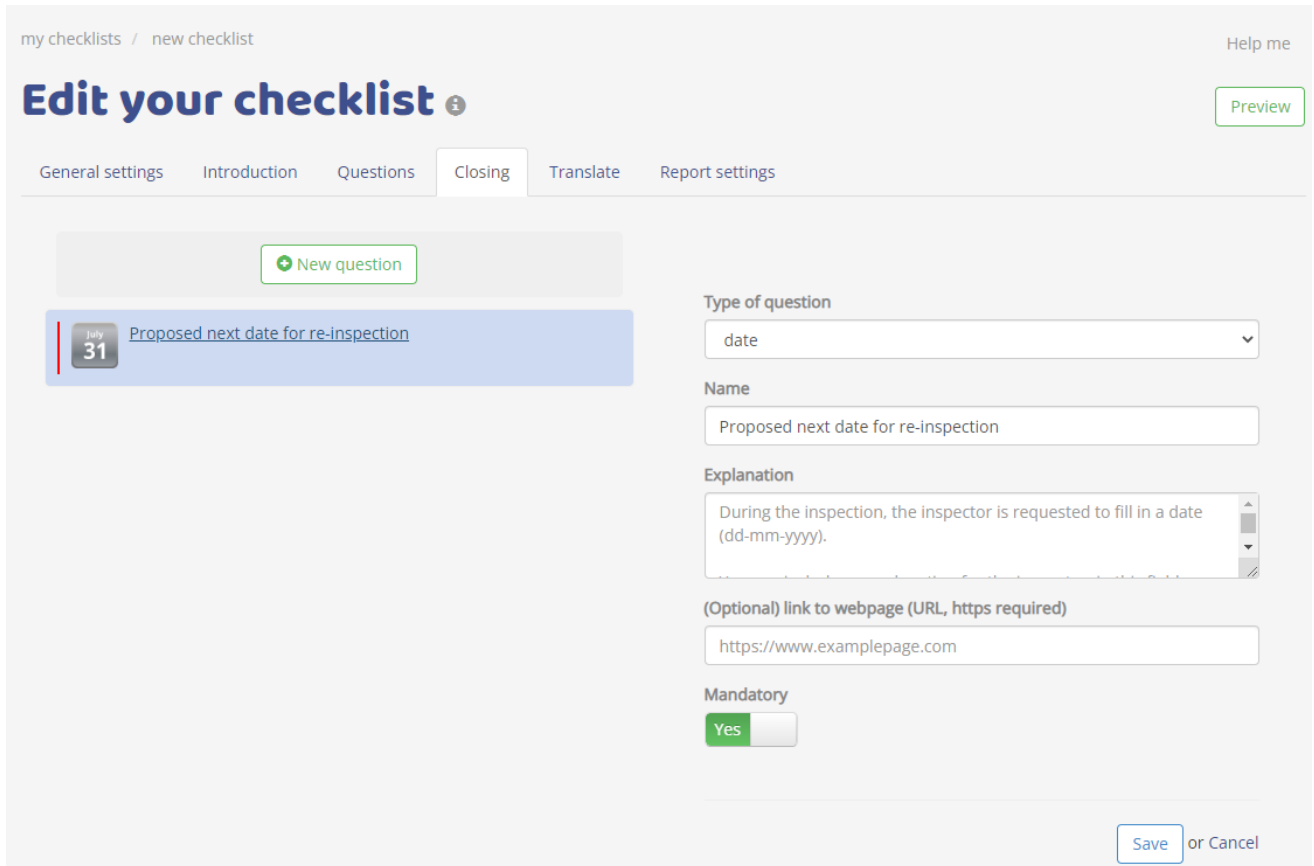
You might want to conclude your checklist with additional questions. The questions in the closing part of the checklist, are not meant for inspection points. They are meant for an overall conclusion or additional information or for approval of the party responsible for the area that is inspected.

For instance: At what date should a re-inspection be carried out?

For instance: What is the overall opinion of the inspector?

To add such questions, you click the New question button. You can now select your type of question. You can now select your desired type of question.

Note: These questions are not included in the report analyses. Therefore the OK/NOK/N.A. question type is not available in this section of the checklist. For extra information about the different question types we refer to chapter 3.



my checklists / new checklist Help me

Edit your checklist Preview

General settings Introduction Questions **Closing** Translate Report settings

+ New question

July 31 Proposed next date for re-inspection

Type of question
date

Name
Proposed next date for re-inspection

Explanation
During the inspection, the inspector is requested to fill in a date (dd-mm-yyyy).

(Optional) link to webpage (URL, https required)
<https://www.examplepage.com>

Mandatory
 Yes

Save or Cancel

You can add as many questions as you desire and use the 'mandatory' selector, to define if your question must be answered by the inspector.

Note: In case a mandatory question is not filled in, the inspector cannot upload the inspection result.

9.7.2. The representatives signature

Easy to Inspect offers the option to include questions in which the persons involved during the inspection, need to sign for acknowledging the inspection outcome.

You can use the signature question and include it in your checklist multiple times. For instance:

- 1) The Inspector
- 2) The Lessor
- 3) The Lessee

or



- 1) The inspector
- 2) The site responsible
- 3) Present co-worker 1
- 4) Present co-worker 2

my checklists / new checklist Help me

Edit your checklist Preview

General settings Introduction Questions **Closing** Translate Report settings

[+ New question](#)

Approval of the lessor

Approval of the lessee

Type of question

signature field ▼

Name

Signature of the inspector

Explanation

By adding this signature field to the questionnaire, a signature can be placed in the App on an iOS/Android smartphone or tablet. Multiple signature fields can be applied in one checklist.

(Optional) link to webpage (URL, https required)

https://www.examplepage.com

Mandatory

Yes

[Save](#) or [Cancel](#)

Note: We advise you to mark this question as mandatory for the inspector only, since the inspector is always present. Other parties might not always be present during the inspection or unwillingly to sign.



9.8. Translate

Once you have created your checklist you can translate it.

Select the translate tab in your checklist editor.

You can select a default language for your checklist, which includes an option that all the fields in other languages are filled with your main language without any further action. So, if users will open the checklist in French, but the checklist is made in English, they can still see the questions, even if the checklist was not translated. The French language fields are now filled with the default English texts. You can see that the default language is displayed in black and the other languages in grey. Once translated, the other languages will be displayed in black letters as well.

my checklists / new checklist Help me
 [Preview](#)

Edit your checklist ⓘ

General settings Introduction Questions Closing **Translate** Report settings

🇳🇱 🇩🇪 🇺🇸 🇫🇷

New Checklist New Checklist New Checklist New Checklist

Introduction

🇳🇱 🇩🇪 🇺🇸 🇫🇷

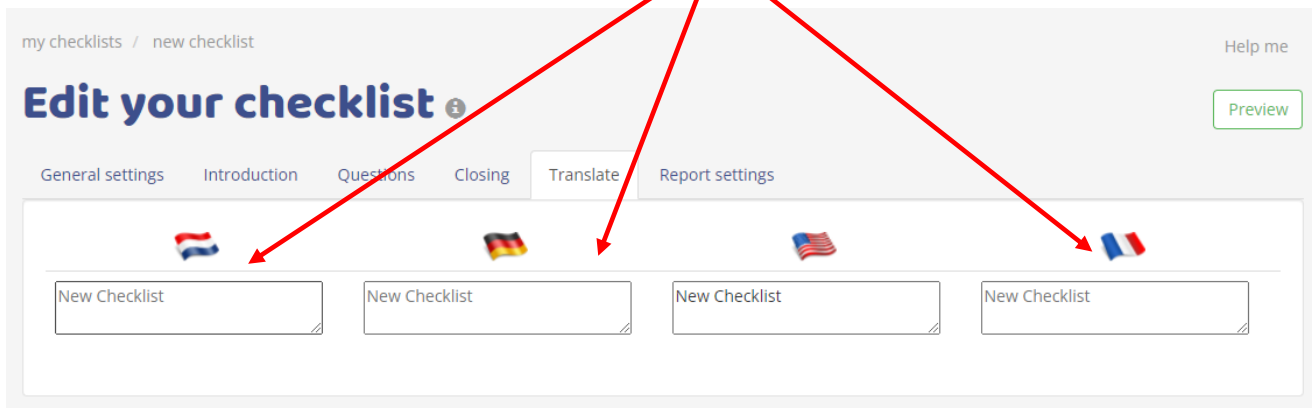
Questions

Section *Section* *Section* *Section*

Factory inspection Factory inspection Factory inspection Factory inspection



To translate, simply type in the specific language box



Note: If you would copy an existing Easy to Inspect checklist, the translations are already included. Now only your new / modified questions need translations.

9.9. Report settings

Easy to Inspect offers a predefined reporting format. You cannot change this format. If you desire to change the format you can export your inspection report data to excel and import the data into an own made format.

We do offer some customization:

- ✓ You can include an introductory text
- ✓ You can include an end text
- ✓ You can select here, if you would like to include the signature of the inspector (this function only applies to checklists created before January 2022 since the signature function has changed in 2022).
- ✓ You can choose here, if you would like to use alternative wording for the OK/NOK/NA type of question
- ✓ You can choose here what information of your inspection must be included in the report:



Set up your report

OK/NOK/NA report alternatives

Show OK/NOK/NA (and percentage question) statistics <input checked="checked" type="checkbox"/>	Show questions in the introduction <input checked="checked" type="checkbox"/>
Show photos in the introduction <input checked="checked" type="checkbox"/>	Show the explanation of the section <input checked="checked" type="checkbox"/>
Show the explanation of the questions <input checked="checked" type="checkbox"/>	Show the answer to the question <input checked="checked" type="checkbox"/>
Show reasoncodes and explanation codes <input checked="checked" type="checkbox"/>	Show comments per answer/score <input checked="checked" type="checkbox"/>
Show the subsequent answer <input checked="checked" type="checkbox"/>	Show photo's with the questions <input checked="checked" type="checkbox"/>
Show questions in the closure <input checked="checked" type="checkbox"/>	

9.9.1. Introductory and end texts

- ✓ You can include an introductory text that will be displayed at the top of your report, above the introduction section of the report. You could use this comment field for instance to give a general introduction about the objective of the inspections, the way the inspections are carried out, an explanation about the standards used etc.
- ✓ You can include a text field at the bottom of the report that will be displayed below the closing section of the report. You could use this comment field for instance to give a general comment about the way the inspections are carried out, an explanation about the standards used etc.

Only if you include a text, this will be displayed in the report.

Note: you need to copy your text in the different language fields. If you don't, other languages will not show the comments. You have the option to translate in order to publish the report also in other languages.



Edit your checklist ⓘ

Preview

General settings Introduction Questions Closing Translate Report settings

Optional: introductory text of the report



This text will be displayed in your report (pdf) after the introduction questions.



This text will be displayed in your report (pdf) after the introduction questions.



INTRODUCTION



This text will be displayed in your report (pdf) after the introduction questions.

Optional: introductory text of the report



This text will be displayed in your report (pdf) after the introduction questions.



This text will be displayed in your report (pdf) after the introduction questions.



The objective of this inspectio is to verify if safety measures have been implemented and.....



This text will be displayed in your report (pdf) after the introduction questions.

Don't forget to save your settings.

9.9.2. Select OK/NOK alternative expressions

Your inspection report will show as a default, OK / NOK and NA answers.

You might change this in other expressions, depending on the type of your inspection.

Set up your report

OK/NOK/NA report alternatives

OK/Not OK/NA

- OK/Not OK/NA
- Good/Poor/NA
- OK/Not OK/NA
- Right/Wrong/NA
- Approved/Rejected/NA
- Safe / Unsafe / N.A.
- Hygienic / Not Hygienic / N.A.

Show the explanation of the questions

Show the explanation of the section

Show the answer to the question


Show reasoncodes and explanation codes

Show comments per answer/score



9.9.3. Show OK/NOK/NA (and percentage question) statistics in the report

Your inspection report will show as a default, the count of OK / NOK and NA answers. In case of using the Score with a percentage questions, also the average scoring count will be included.



EXAMPLE CHECKLIST

Date

User

Reference

ID

61a4894c301eff0001e6ac33

	Amount	Ok	Not ok	N.A.	Avg. Score		
Total	6	4	80%	1	20%	1	83 %
Score with percentage section	4	2	67%	1	33%	1	83%
OK/NOK/NA section	2	2	100%	0	0%	0	

If desired, reports can be generated without such scoring Table.

In the here for shown report, the columns indicate:

Total: Total number of questions in the checklist that count in the calculation

Score with the

percentage section: A section of the checklist with only 5S questions

OK/NOK/NA section: A section of the checklist with only OK/NOK/NA questions

Amount: Total amount of questions

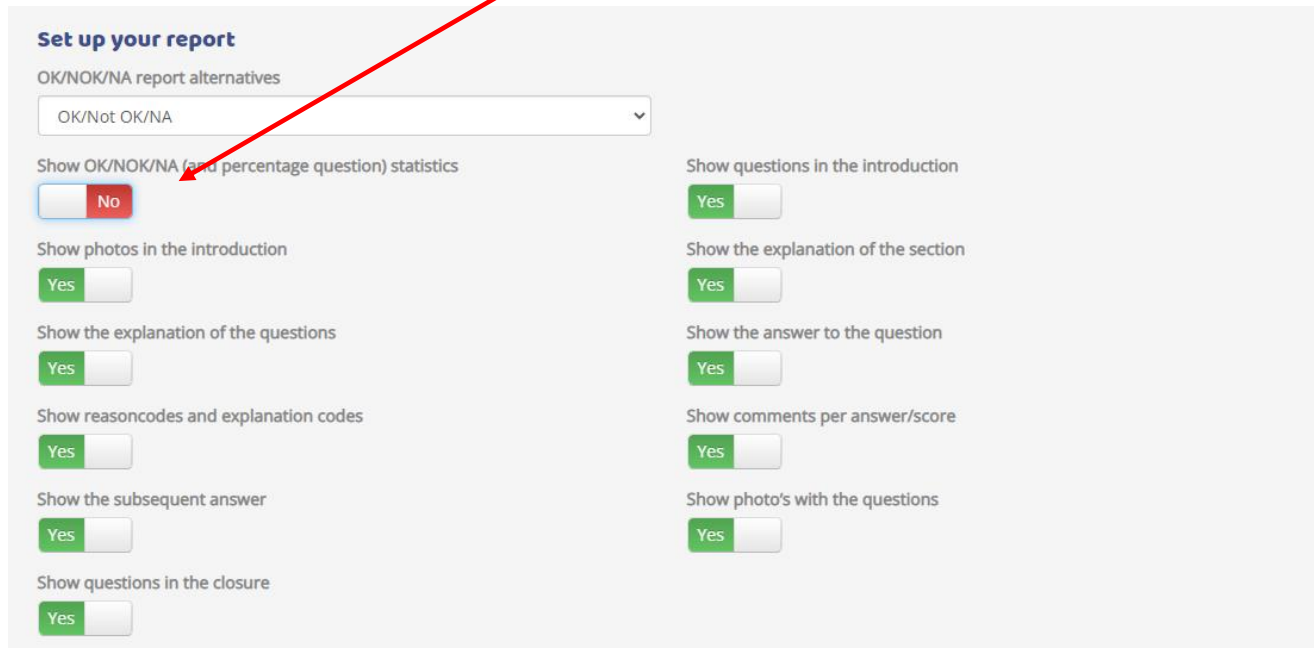
OK: Amount of questions scored OK and the percentage of the total amount of OK/NOK questions (NA questions are not included in the calculation of the percentage).

Not OK: Amount of questions scored as Not OK and the percentage of the total amount of OK/NOK questions (NA questions are not included in the calculation of the percentage). Also the Score with a Percentage questions that scored a percentage under the lower limit are counted as NOK-scores and included in the statistics.

N.A.: Amount of questions scored to be not applicable

Avg. Score: The average score of the questions that were score with a percentage (in the example: the average score of the 3 questions applicable (2 OK and 1 NOK) is 83%. This was based on a 100% (OK), 50% (NOK) and 100% (OK) scoring in a checklist with a lower limit score of 75%.

To hide the scoring table in the report, slide the button.



Set up your report

OK/NOK/NA report alternatives
OK/Not OK/NA

Show OK/NOK/NA (and percentage question) statistics No

Show questions in the introduction Yes

Show photos in the introduction Yes

Show the explanation of the section Yes

Show the explanation of the questions Yes

Show the answer to the question Yes

Show reasoncodes and explanation codes Yes

Show comments per answer/score Yes

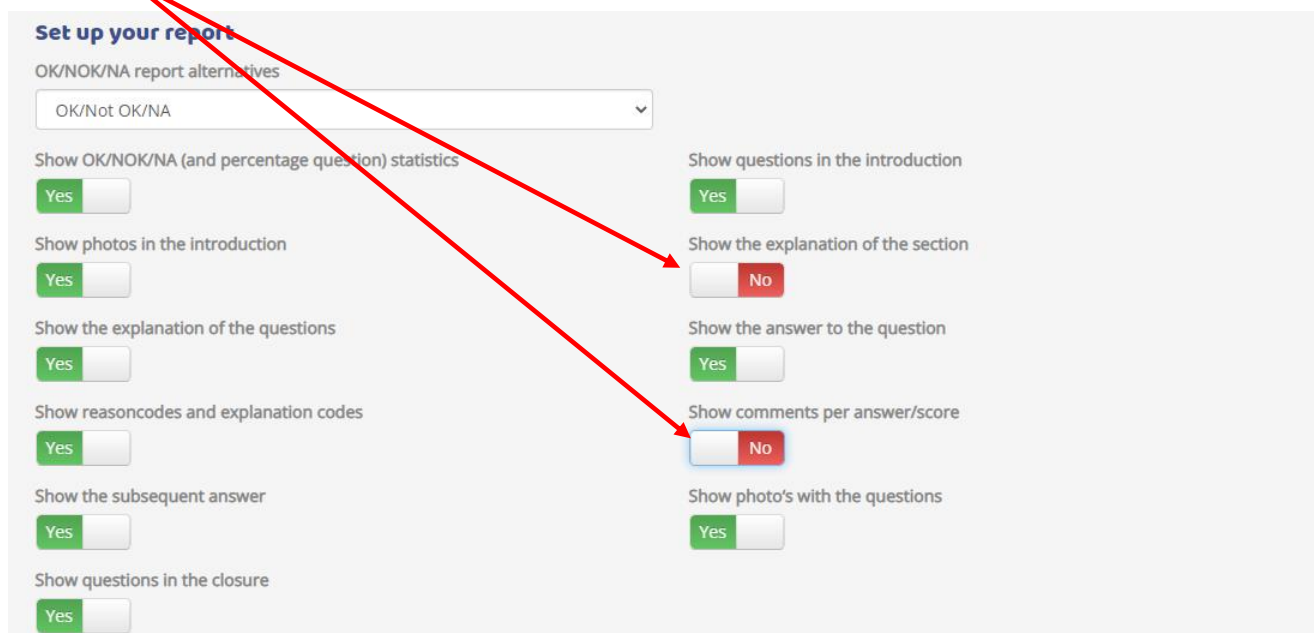
Show the subsequent answer Yes

Show photo's with the questions Yes

Show questions in the closure Yes

9.9.4. Select other report settings

As a default all options are included in the report. If you would reduce your report size, simply slide the buttons.



Set up your report

OK/NOK/NA report alternatives
OK/Not OK/NA

Show OK/NOK/NA (and percentage question) statistics Yes

Show questions in the introduction Yes

Show photos in the introduction Yes

Show the explanation of the section No

Show the explanation of the questions Yes

Show the answer to the question Yes

Show reasoncodes and explanation codes Yes

Show comments per answer/score No

Show the subsequent answer Yes

Show photo's with the questions Yes

Show questions in the closure Yes

9.9.5. Signature of the inspector (for checklist created < 2022) – The function is no longer supported.

9.9.5.1. Apply the signature of the inspector (No longer supported)

9.9.5.2. Additional information about the inspector (No longer supported)

9.10. Preview

At any time, you can preview how your inspection looks like.

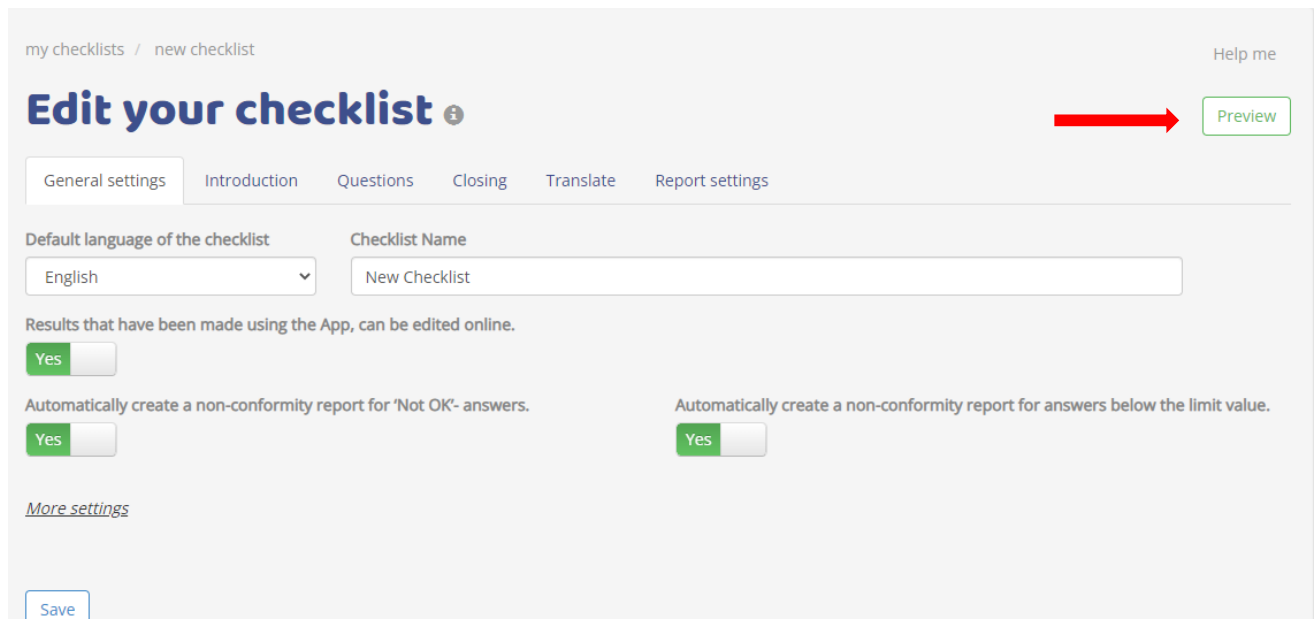
Such can be done in two ways:

- A) Preview in the editor
- B) The App

9.10.1. Preview in the checklist editor

The preview function shows you the checklist if it was filled in. So, the end result will be displayed as a blank inspection report.

The preview button is always visible in the checklist editor screen. Simply click on the button and a new browser tab will open and the report will be displayed.





9.10.2. Preview in the APP

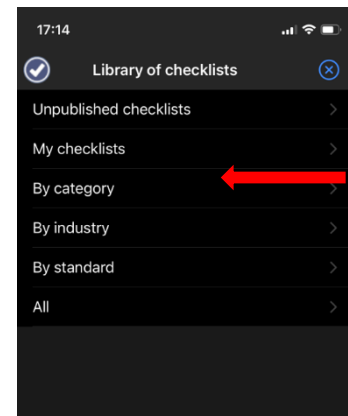
The App contains a section in the library, “UNPUBLISHED checklist”.

Only the administrator has access to the unpublished checklist. So, all checklist that are under development or finished but not yet published, will be visible in the App after synchronisation.

The administrator can download the checklist and test it out in the APP.

After completion, the administrator will receive a pdf-report by email to verify if the checklist fulfils the needs. The checklist result itself will not be stored in the archive, since this is only a test version that must be published first.

It is possible to modify the unpublished version after the test. Such is no longer possible after publication. Changes to published checklist must be done via the copy your checklist and modify function (see chapter 10).



10. Edit, copy or export your checklist

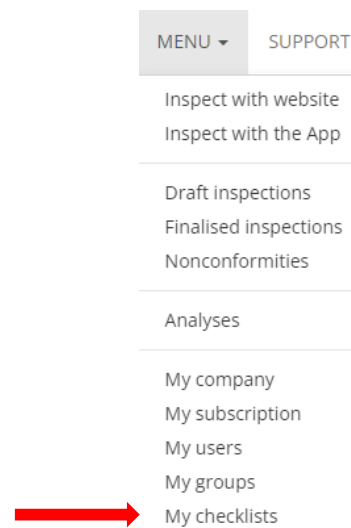
10.1 Edit your checklist

If your checklist is unpublished it can be modified.

Published checklists cannot be modified since this would affect checklist results that already have been uploaded.

To modify your checklist, follow following steps:

Go to the main menu and select 'My checklists'.










The overview with all your published and unpublished checklist will be shown.

my checklists Help me

My checklists ⓘ

Name	Default language of the checklist	Version	Published	Visible	Actions
New Checklist	English	4			<input type="button" value="Action"/>
Behaviour Based Safety Checklist	English	2	Yes	<input checked="" type="checkbox"/>	<input type="button" value="Action"/>
Workplace inspection construction	English	2	Yes	<input checked="" type="checkbox"/>	<input type="button" value="Action"/>

Select your non-published checklist, select the action button and choose 'edit'.

Name	Default language of the checklist	Version	Published	Visible	Actions
New Checklist	English	4			 Action ▾
Behaviour Based Safety Checklist	English	2	Yes		<ul style="list-style-type: none">  Copy  Assign users  Edit  Delete  Export
Workplace inspection construction	English	2	Yes		

Your checklist will re-open and you can modify it to your needs.

10.2 Modifying existing checklists

Once you have published your checklist, you can **no longer modify** it. Changing existing checklists, for instance by adding new questions, would affect uploaded results and your analyses. In this case you should copy your checklist and work from there.

10.2.1 Copy your checklist

Simply select your own, or an Easy to Inspect example checklist.

Go to the main menu and select 'My checklists'.

MENU ▾	SUPPORT
Inspect with website	Inspect with the App
Draft inspections	Finalised inspections
Nonconformities	
Analyses	
My company	My subscription
My users	My groups
My checklists	

Select the button: [👤 Create a brand new checklist](#)



my checklists

Help me


My checklists +

Schedule inspections






Set causes

Set filters

 [+ Create a brand-new checklist](#)

 Easy to Inspect checklists are visible

 Click to show 'hidden' checklists

Name	Default language of the checklist	Version	Published	Visible	Actions
New Checklist	English	4			 Action ▾
Behaviour Based Safety Checklist	English	2	Yes		 Action ▾
Workplace inspection construction	English	2	Yes		 Action ▾

For “Example-checklists” of Easy to Inspect: select your checklist from the overview and press copy

A brand new checklist

Create a brand new checklist

 New checklist

Import a checklist

Import a checklist from another account. Please notice! Your imported checklist will use Easy to Inspects default 'NOK-causes' and 'OK/N.A.-explanations'. If you wish to use your custom made codes, please change your settings.

Geen bestand gekozen

Import

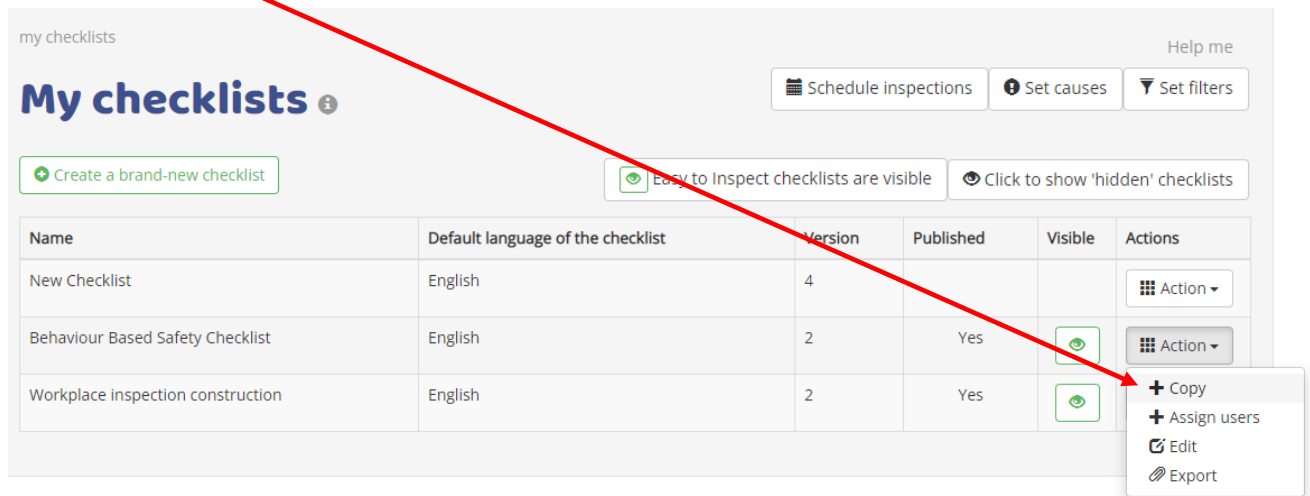
Copy a checklist

Select existing Easy to Inspect checklist

Trailer / container checklist
Truck / Trailer pre start checklist
Unloading site safety check (Responsible Care)
Unmanned fuelstations
Unsafty report
Warehouse hygiene
Work permits
Workplace hygiene checklist
Workplace inspection (general)
Workplace inspection (special) transport
Workplace inspection chemical industry

 Copy

For revising own checklists, select your checklist and select the action button COPY.



my checklists Help me

My checklists Schedule inspections Set causes Set filters

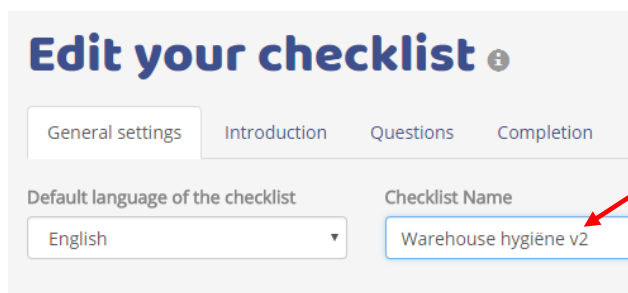
Create a brand-new checklist Easy to Inspect checklists are visible Click to show 'hidden' checklists

Name	Default language of the checklist	Version	Published	Visible	Actions
New Checklist	English	4			Action ▾
Behaviour Based Safety Checklist	English	2	Yes		Action ▾
Workplace inspection construction	English	2	Yes		<ul style="list-style-type: none"> + Copy + Assign users Edit Export

Your copied checklist will be displayed with the text 'Copy' added to it. You can now modify the checklist.

Notice:

- ✔ First change the checklist name and save. Work form there.
- ✔ Don't forget to modify the name of the checklist before publishing. You cannot publish it with the same name as previously. You first must hide/unpublish the previous version for your users. Then you can use the same name. We recommend however that you use a version number in your checklist. for instance:



Edit your checklist Introduction Questions Completion

General settings

Default language of the checklist: English

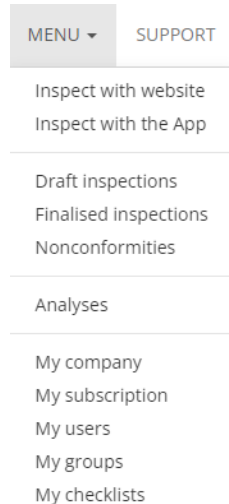
Checklist Name: Warehouse hygiène v2

10.3 Export and import your checklist

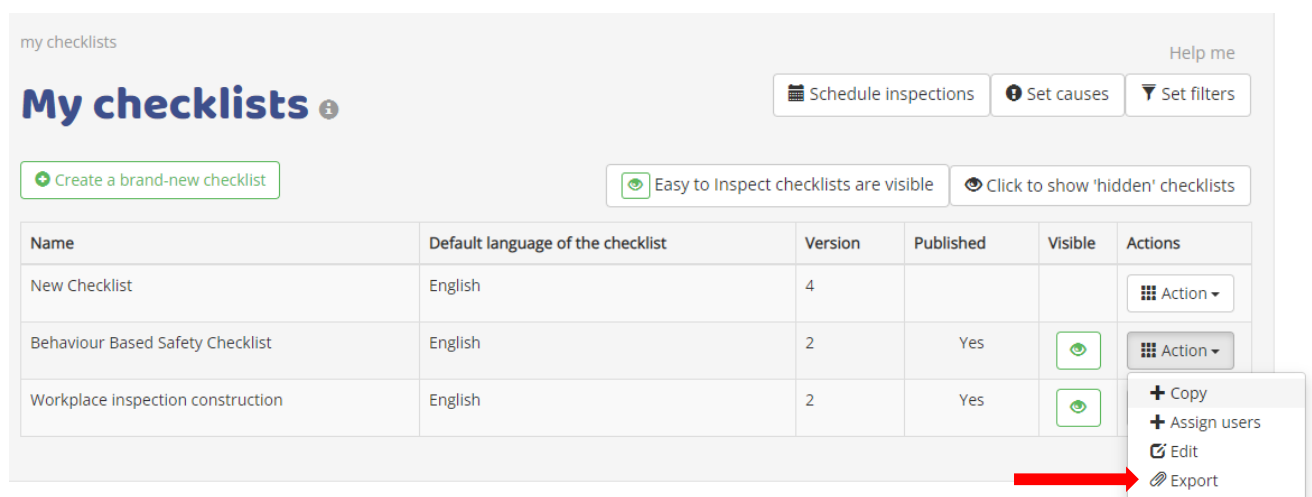
If you manage multiple accounts of Easy to Inspect within your company, and you use similar or the same checklists, it might be useful to copy a checklist from one account to the other.

10.3.1 Export your checklist

Go to the main menu and select 'My checklists'.



Click on the action button of the checklist you would like to export. Select 'export'



my checklists Help me

My checklists
Schedule inspections
Set causes
Set filters

Create a brand-new checklist Easy to Inspect checklists are visible Click to show 'hidden' checklists

Name	Default language of the checklist	Version	Published	Visible	Actions
New Checklist	English	4			Action ▾
Behaviour Based Safety Checklist	English	2	Yes		Action ▾
Workplace inspection construction	English	2	Yes		<ul style="list-style-type: none"> + Copy + Assign users Edit Export

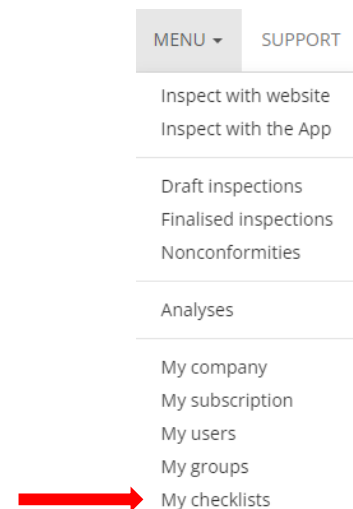
Save the exported checklist on your computer.

Notice: If you export a checklist, not all elements of the checklist can be exported. OK/N.A. – explanations and NOK-cause codes cannot be exported (or imported), since these elements are account specific. Filter values are also not copied.

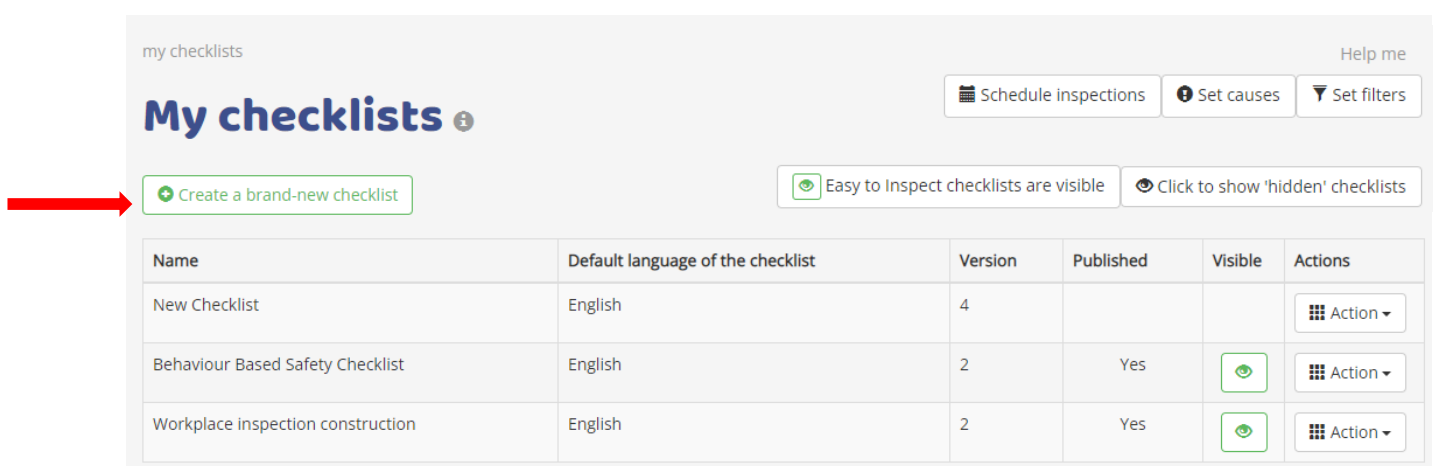
You must rebuild the same settings in the account in which you will be importing the checklist.

10.3.2 Import your checklist

Go to the main menu and select 'My checklists'.



Select the button:



my checklists Help me

My checklists ⓘ

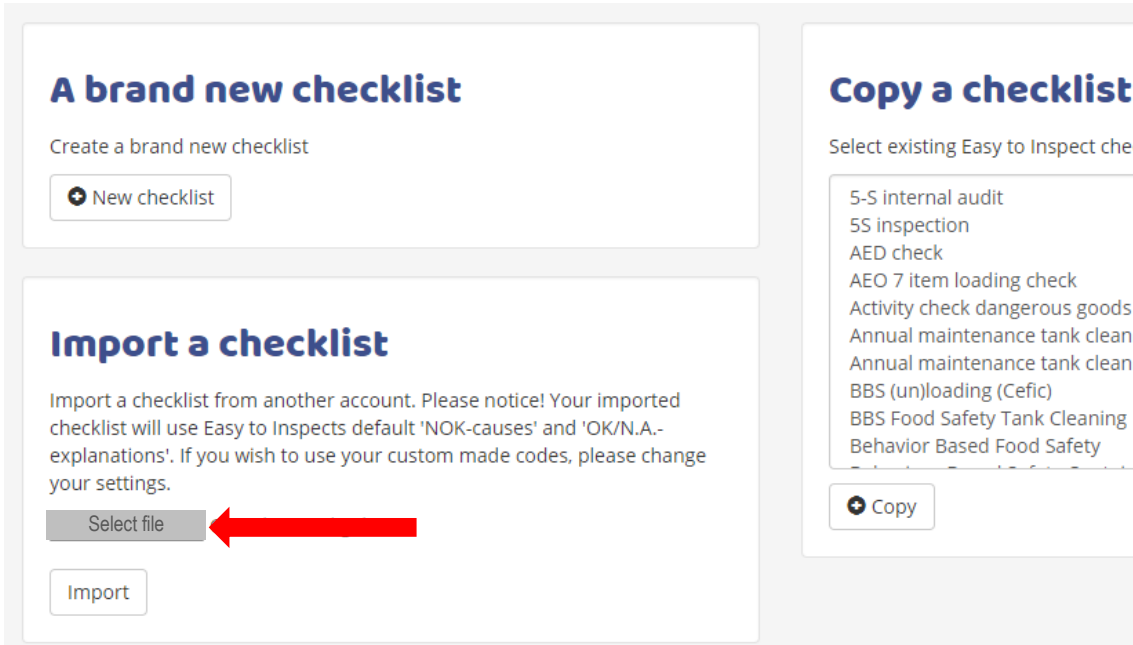
Schedule inspections ⓘ Set causes ⓘ Set filters ⓘ

Create a brand-new checklist ⓘ Easy to Inspect checklists are visible ⓘ Click to show 'hidden' checklists ⓘ

Name	Default language of the checklist	Version	Published	Visible	Actions
New Checklist	English	4			Action ▾
Behaviour Based Safety Checklist	English	2	Yes	<input checked="" type="checkbox"/>	Action ▾
Workplace inspection construction	English	2	Yes	<input checked="" type="checkbox"/>	Action ▾

Select Import a checklist.

And select the file on your computer.



The screenshot shows two main panels. The left panel has a section titled "A brand new checklist" with a sub-heading "Create a brand new checklist" and a button labeled "New checklist". Below this is another section titled "Import a checklist" with a sub-heading "Import a checklist from another account. Please notice! Your imported checklist will use Easy to Inspects default 'NOK-causes' and 'OK/N.A.-explanations'. If you wish to use your custom made codes, please change your settings." Below the text are two buttons: "Select file" and "Import". A red arrow points to the "Select file" button. The right panel is titled "Copy a checklist" with a sub-heading "Select existing Easy to Inspect chec". It contains a list of checklist items: "5-S internal audit", "5S inspection", "AED check", "AEO 7 item loading check", "Activity check dangerous goods s", "Annual maintenance tank cleanir", "Annual maintenance tank cleanir", "BBS (un)loading (Cefic)", "BBS Food Safety Tank Cleaning", and "Behavior Based Food Safety". Below the list is a button labeled "Copy".

Notice: If you export a checklist, not all elements of the checklist can be exported. OK/N.A. – explanations and NOK-cause codes cannot be exported (or imported), since these elements are account specific. Filter values are also not copied.

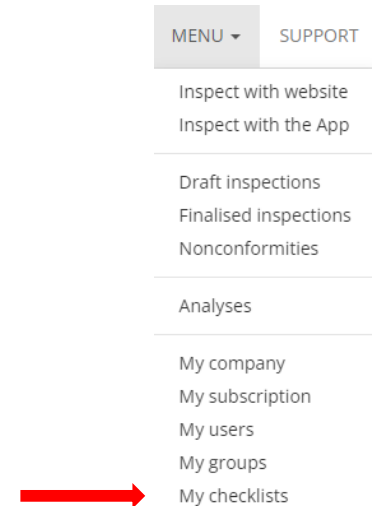
You must rebuild the same settings in the account in which you will be importing the checklist.

11 Publish and unpublish your checklist

11.1 Publish your checklist

When you are finished, you would like to publish your checklist and let your inspectors use it.

Go to the main menu and select 'My checklists'.



Warning: Published checklists cannot be changed. They only can be copied or previewed.

Always use the **Preview** function first to check the content and typing errors of your checklist. Check all languages!

The overview with all your published and unpublished checklist will be shown. Once you are certain that your checklist is correct and can be used by your users in the field, you press the '**Publish**' button.

Notice: The publish button will only appear if a checklist contains at least one section and 1 question within a section. This is to prevent that inspection questions will be included in the introduction section. Inspection questions **MUST** be included in the QUESTIONS part of the checklist.

my checklists Help me

My checklists

Name	Default language of the checklist	Version	Published	Visible	Actions
New Checklist	English	4	<input type="button" value="Publish"/>		<input type="button" value="Action"/>
Behaviour Based Safety Checklist	English	2	Yes	<input checked="" type="checkbox"/>	<input type="button" value="Action"/>
Workplace inspection construction	English	2	Yes	<input checked="" type="checkbox"/>	<input type="button" value="Action"/>

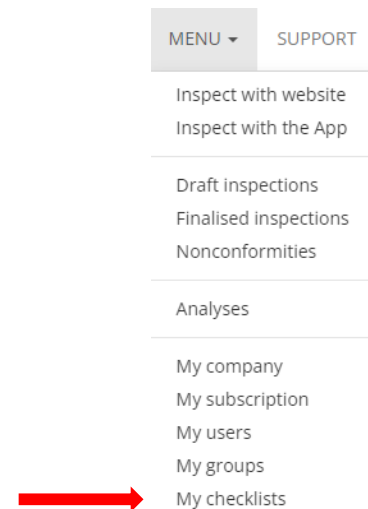
11.2 Hide a published checklist

After using your checklist for a while, it might need to be changed.

The old checklist can however not be deleted. The reason for that is that deleting would implicate that all checklist results will be deleted as well. Your analyses will also be lost.

On the other hand, you don't want your users to use the outdated checklist anymore. Therefore, Easy to Inspect offers the option to hide a checklist from your users.

Go to the menu and select 'My checklists'





In the overview you see all the checklists that you created and published. These are marked in the column 'Published'. Also, you can see which checklists are visible for your users. These are marked with a green 'eye'.

If you would like to hide the checklist press on the green 'eye'. The 'eye' will turn red.

my checklists Help me

My checklists
Schedule inspections
Set causes
Set filters

Create a brand-new checklist
Easy to Inspect checklists are visible
Click to show 'hidden' checklists

Name	Default language of the checklist	Version	Published	Visible	Actions
Behaviour Based Safety Checklist	English	2	Yes		Action ▾
Workplace inspection construction	English	2	Yes		Action ▾



my checklists Help me

My checklists Schedule inspections Set causes Set filters

Create a brand-new checklist Easy to Inspect checklists are visible Click to show 'hidden' checklists

Name	Default language of the checklist	Version	Published	Visible	Actions
Behaviour Based Safety Checklist	English	2	Yes		Action ▾
Workplace inspection construction	English	2	Yes		Action ▾

If you would like to unhide, press the “red” eye.

11.3 Hide all Easy to Inspect checklists to your users

It could become confusing if you have developed specific checklists that differ from, but resemble to the standard Easy to Inspect checklists. To prevent any confusion, the administrator can hide the Easy to Inspect checklists for the users.

Go to the menu and select ‘My checklists’

MENU ▾ SUPPORT

- Inspect with website
- Inspect with the App
- Draft inspections
- Finalised inspections
- Nonconformities
- Analyses
- My company
- My subscription
- My users
- My groups
- My checklists

In the menu that will be opened, it is displayed whether the checklists are visible or hidden for the users.

Simply click on the green bar and the checklists will be hidden.

my checklists Help me

My checklists Schedule inspections Set causes Set filters

Create a brand-new checklist

Easy to Inspect checklists are visible Click to show 'hidden' checklists

Name	Default language of the checklist	Version	Published	Visible	Actions
Behaviour Based Safety Checklist	English	2	Yes		Action ▾
Workplace inspection construction	English	2	Yes		Action ▾

my checklists Help me

My checklists Schedule inspections Set causes Set filters

Create a brand-new checklist

Easy to Inspect checklists are hidden Click to show 'hidden' checklists

Name	Default language of the checklist	Version	Published	Visible	Actions
Behaviour Based Safety Checklist	English	2	Yes		Action ▾
Workplace inspection construction	English	2	Yes		Action ▾

The effect of this action is that users in the App cannot see the Easy to Inspect checklists. The administrator can see all checklists in his dashboard and copy / modify the Easy to Inspect example checklists.

If you would like to check on the hidden checklists or copy one you can also click the button. Click again to display the active and unpublished checklists.

my checklists Help me

My checklists Schedule inspections My causes My filters

Create a brand-new checklist Easy to Inspect checklist → Click to show 'hidden' checklists

Name	Default language of the checklist	Version	Published	Visible	Actions
Behaviour Based Safety Checklist	English	2	Yes		Action ▾
Workplace inspection construction	English	2	Yes		Action ▾

my checklists Help me

My checklists Schedule inspections Set causes Set filters

Create a brand-new checklist Easy to Inspect checklists are visible → Click to show 'active' checklists

Name	Default language of the checklist	Version	Published	Visible	Actions
TEST	Dutch	3	Yes		Action ▾
Behaviour Based Safety Checklist	English	2	Yes		Action ▾

11.4 Assign custom made checklists to specific users

Within Easy to Inspect you can assign specific checklist to specific users and make sure that these inspectors will see these checklists in their library in the app. You can even define that these inspectors can only use these specific checklists and no other checklists.

11.4.1 Assign users to your checklist

Go to the menu / my checklists and click the 'assign user action button'.

my checklists Help me

My checklists

Name	Default language of the checklist	Version	Published	Visible	Actions
Behaviour Based Safety Checklist	English	2	Yes	<input type="checkbox"/>	<input type="button" value="Action"/> <ul style="list-style-type: none"> <input type="button" value="+ Copy"/> <input type="button" value="+ Assign users"/> <input type="button" value="Edit"/> <input type="button" value="Export"/>
Workplace inspection construction	English	2	Yes	<input type="checkbox"/>	

Then, assign your inspectors by selecting yes or no.

my checklists / assign users Help me

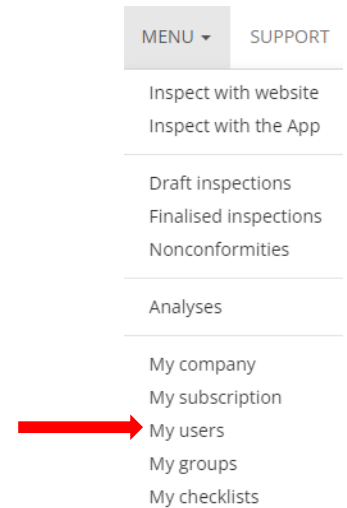
Assign users to: Behaviour Based Safety Checklist ⓘ

User	Default preparation in App
Aaaaa	<input type="checkbox"/> No
Bbbbb	<input type="checkbox"/> No
Ccccc	<input type="checkbox"/> No
Ddddd	<input checked="" type="checkbox"/> Yes



11.4.2 Limit the use of Easy to Inspect to assigned checklists only

Go to the menu / my users



Click “assign checklists” in the action button.

manage / my users Help me

My users

You are using 10 of the maximum number of 10 users.

The user Aaaaa is created

Name	E-mail	Your alternative E-mail address (receiver)	Roles and usergroups	Last updated (created)	
Aaaaa	aaaa@easytoinspect.com	Aaaa@easytoinspect.com	Roles: Inspect, Actions, Analyse User groups:	04-12-2023 (04-12-2023)	<div style="border: 1px solid #ccc; padding: 2px;">⋮ Action<ul style="list-style-type: none">✎ Edit✎ Assign checklists⏻ Disable</div>

You can now choose:

- A) What checklist should be place for immediate use in the App.
- B) What checklists the user can see (here you can limit the use of other checklists).
Would you like to limit the use of Easy to Inspect to assigned checklists? For disabling the use of other checklists than assigned checklists, select the option “only assigned custom made checklists allowed”.

manage / my users / Assign checklists Help me

Assign your checklists to users ⓘ

Checklist	Default preparation in App
Behaviour Based Safety Checklist	<input checked="" type="checkbox"/> Yes
Workplace inspection construction	<input type="checkbox"/> No
Only assigned custom made checklists allowed? →	
	<input checked="" type="checkbox"/> Yes

11.4.3 Scheduling your inspections

Go to the main menu and select “My checklists”. In the main screen you see the option to schedule your inspections.

my checklists Help me

My checklists ⓘ

Easy to Inspect checklists are visible Click to show 'hidden' checklists

Name	Default language of the checklist	Published	Visible	Actions
Behaviour Based Safetv Checklist	English	Yes	<input checked="" type="checkbox"/>	⋮

Click on New to create a new scheme.

You can now create a scheme for one inspector, multiple inspectors, per checklist etc.

So, if inspector Aaaa & Bbbb have to carry out inspection X every week and inspector Cccc has to carry out inspection X only once per month, you can create two schemes. Save your settings.



my checklists / schedule / new Help me

Create a new schedule ?

Select checklist

Behaviour Based Safety Checklist
Workplace inspection construction

Users

- Aaaa
- Bbbb
- Brad Michowitz
- Cccc
- Dddd
- Danielle Miller
- Samuel Loscalzo

Date start: 09-12-2019

Schedule: Weekly on Wednesdays*

Send email to user: Yes

or

Once you have assigned the schedule you can select if you would like Easy to Inspect to send an email or that the user connects the schedule to his/her digital agenda with the iCal function. Every user can do such him/herself.

my checklists / schedule Help me

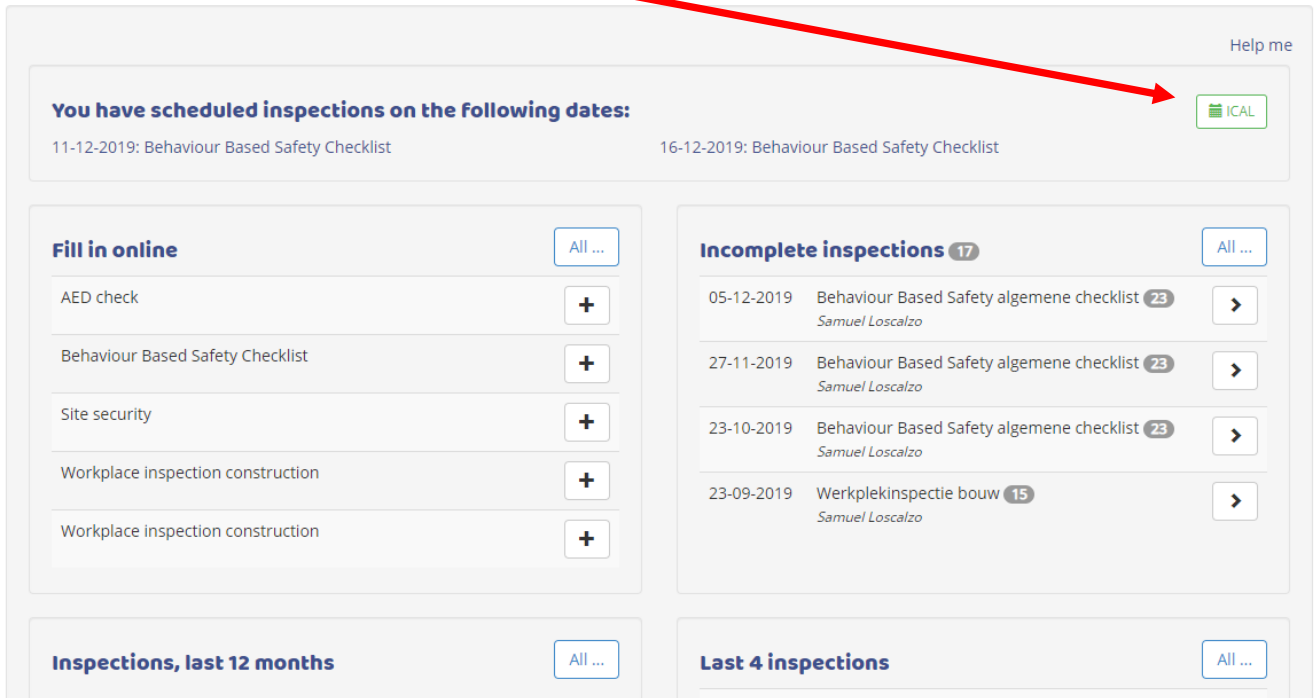
Schedule inspections ?

Name	Users	Schedule	Email	Date start	Last send	Next	
Behaviour Based Safety Checklist	Aaaa, Bbbb	Weekly on Wednesdays	Yes	09-12-2019		11-12-2019	<input type="button" value="Action"/>
Behaviour Based Safety Checklist	Cccc	Monthly on the -1th to last day of the month	Yes	09-12-2019		31-12-2019	<input type="button" value="Action"/>

11.4.4 Scheduling via iCal

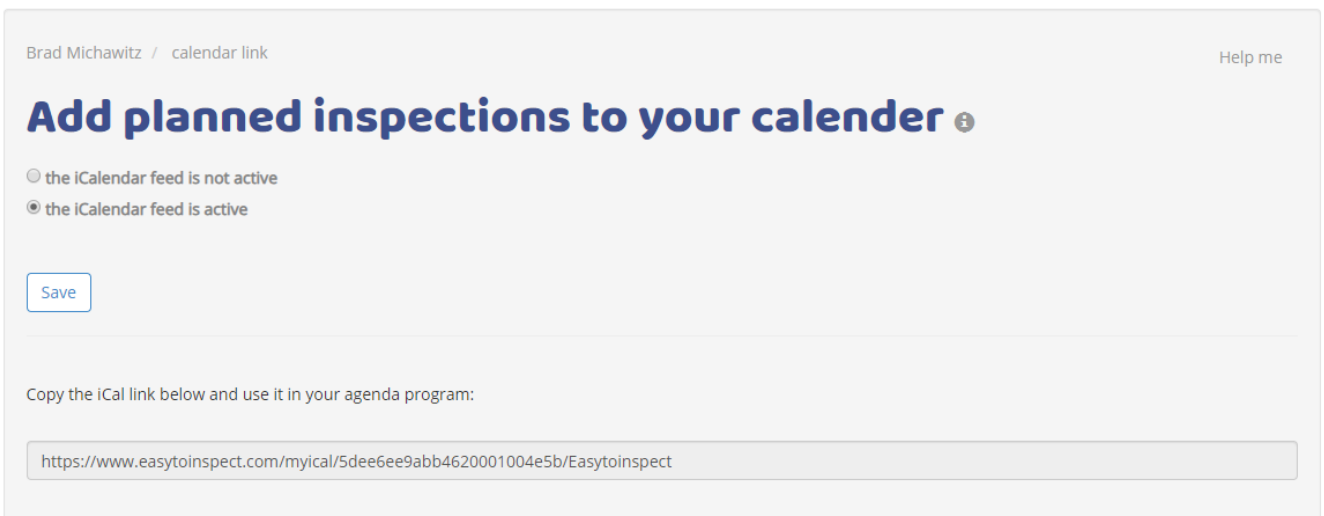
Once you have assigned the schedule your user can connect the inspection schedule to his/her icalendar. It is best in this case, to not also send an email. So do not select the options as mentioned in 11.4.3 to 'send email to user'.

Your inspector can link his / her ical via the dashboard after login.



The screenshot shows the user dashboard. At the top right, there is a 'Help me' link. Below it, a section titled 'You have scheduled inspections on the following dates:' lists two dates: '11-12-2019: Behaviour Based Safety Checklist' and '16-12-2019: Behaviour Based Safety Checklist'. To the right of this section is a green button labeled 'ICAL'. A red arrow points from the text above to this button. Below the scheduled inspections, there are four main sections: 'Fill in online' with a list of checklist items (AED check, Behaviour Based Safety Checklist, Site security, Workplace inspection construction) and an 'All ...' button; 'Incomplete inspections' with a list of past inspections (e.g., 05-12-2019, 27-11-2019) and an 'All ...' button; 'Inspections, last 12 months' with an 'All ...' button; and 'Last 4 inspections' with an 'All ...' button.

Select 'the iCalendar feed is active and generate a link. Copy the link in your digital agenda program.



The screenshot shows the 'Add planned inspections to your calendar' settings page. At the top, it says 'Brad Michawitz / calendar link' and 'Help me'. The main heading is 'Add planned inspections to your calendar'. There are two radio button options: 'the iCalendar feed is not active' (unselected) and 'the iCalendar feed is active' (selected). Below these options is a 'Save' button. At the bottom, there is a text prompt: 'Copy the iCal link below and use it in your agenda program:' followed by a text box containing the URL: 'https://www.easytoinspect.com/myical/5dee6ee9abb4620001004e5b/Easytoinspect'.



12 Common questions when creating checklists

No.	Issue	Remark
1	I cannot create a checklist	You have to have the proper rights to create new checklists, filters and cause codes. Ask your administrator to Assign the role checklist-administrator to you.
2	I cannot add a comment field when I create a checklist question	The comment fields are automatically generated in the App. You don't need to do so in the checklist editor.
3	I would like to use Easy to Inspect in another language than the 4 languages provided.	This is not possible at the time. Although you could use the language fields of a language not used by you, the standard labels will be shown to the user in the original language. So, if you would fill in Spanish fields in the German language the user would see German labels in the App but Spanish questions. We advise you not to use Easy to Inspect in this way. The exception could be using the English version of Easy to Inspect and fill it in your own language (Spanish, Polish etc.).
4	I cannot publish a checklist	Make sure that you at least have created 1 Section and included at least 1 question in your checklist. Verify via menu 'my checklist'.
5	I have published a checklist but found out typing errors and other mistakes.	<p>You are limited in modifying a published checklist. Please check your checklist before publishing with the preview function. The correction of typing errors is possible. Be aware, you can change the meaning of a question and thus impact your analysis! For bigger changes, the only option you have is to copy the current questionnaire, hide the current one and create a new checklist based on the 'old & copied' version.</p> <p>Be aware that if you analyse your revised checklist, the data of the previous version of your checklist is not included.</p>
6	I published a checklist and we have been using it for a while. Now I would like to expand the checklist with new questions.	<p>Unfortunately, you cannot modify a published checklist. Now, the only option you have is to copy the current questionnaire, hide the current one and create a new checklist based on the 'old & copied' version.</p> <p>Be aware that if you analyse your revised checklist, the data of the previous version of your checklist is not included.</p>
7	I would like to include 20 checklists in the system.	You can include an unlimited number of questionnaires.
8	I would like to include a checklist with 20 sections of 25 checkpoints each.	There are no restrictions in the number of sections and number of questions per sections. However, we advise to restrict the checklist to a maximum of 50 questions for user-friendliness. Furthermore, the length of your checklists will impact the speed of use in your mobile device (depending on memory capacity, operating system and the number of photo's added).
9	After publishing my users can still not use the checklist.	The checklist will first be available in the App, after synchronisation. This can be done by restarting the app, automatically every 15 minutes or after selecting 'synchronise' in the user menu of the App.
10	My users don't see the checklist although they did synchronise.	<p>Check if you did name your checklist.</p> <p>Check if your user is using the correct language.</p>
11	When using the checklist my users don't see all labels of the filters. They only can use the drop down menu.	Check if you have named your filter labels.
12	I would like to copy an Easy to Inspect standard checklist and customise this to my needs.	That is possible. After copying you can change the name, add filters, changes cause codes, add general questions, checklist questions etc.



No.	Issue	Remark
13	I don't see the changes I made immediately.	The best way to check if the change is processed is to refresh your screen. Use the F5 button or Ctrl F5 combination.