



## Assign checklists to users

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## 1. Purpose of this document

To explain how you can limit / grant users access to checklists.

The administrator can decide which checklists the inspector can use:

- All checklists (no action required)
- Only own custom made checklist
- A single or a set of checklists

## 2. Assign users to your checklist

Go to the Main Dashboard, select settings and then 'my checklists'.  
Select your checklist and select in the action button 'assign users'.

Name	Default language of the checklist	Version	Published	Visible	Actions
Behaviour Based Safety Checklist	English	2	Yes	<input checked="" type="checkbox"/>	Action
Workplace inspection construction	English	2	Yes	<input checked="" type="checkbox"/>	+ Copy + Assign users Edit Export

Then, assign your inspectors by selecting yes or no.

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

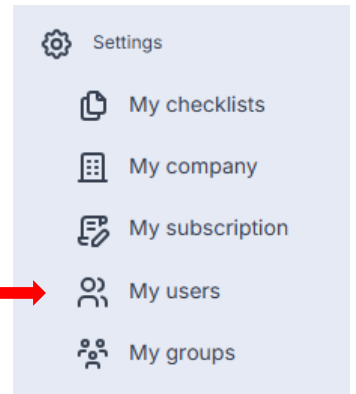
Save









### 3. Assign one or multiple checklists to a user

Go to the Settings menu and select my users



Click “assign checklists” in the action button.

12 Selection    10 / 40 Normal users    2 / 80 Action only users

	Name	Email	User type	Roles and usergroups	2-factor	Last updated (created)	State
 <ul style="list-style-type: none"> <li> Edit</li> <li> Assign checklist</li> <li> Disable</li> </ul>	1 Example user	Exampleuser1@easytoinspect.com	Normal	Roles: Inspect, Actions, Analyse User groups:		24-12-2024 13:00 (27-10-2024 08:01)	Active

You can now choose:

A) What checklist should be placed for immediate use in the App.

Start typing the name of the checklist. All checklist that could match your search criteria would be displayed.

Search a checklist to add it to the default checklists

Search checklist

- Behaviour Based Safety Checklist



Once you selected the checklist, this will be displayed.

Search a checklist to add it to the default checklists

Search checklist  
Start typing the checklist name to select a checklist

Current assigned checklists

Checklist name	Actions
Behaviour Based Safety Checklist	<a href="#">Remove</a>

You can now choose:

B) Which 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 allow the above selected checklist(s)”.

Easy to Inspect

My users > Select default checklists for user 1 Example user

EN Brad Michawitz

Search a checklist to add it to the default checklists

Search checklist  
b  
Behaviour Based Safety Checklist

Current assigned checklists

Checklist name	Actions
Behaviour Based Safety Checklist	

Access to checklist library of Easy to Inspect

Only allow the above selected checklist(s)

Only allow the above selected checklist(s)

Allow also access to the Easy to Inspect library





#### 4. App

Based on option A), the inspector sees the checklists assigned prepared in his App. They are immediately available for use.

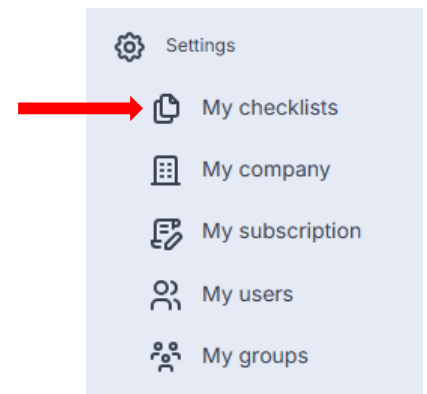
However, the inspector can always select another custom-made checklist in the library.

Only if you have limited the access to other checklists via option B), the users now can only use the selected checklist. Thereby they are restricted in the use of Easy to Inspect. They can not access the library and download other default or custom-made checklists.

#### 5. Hide all default checklists for users.

It could become confusing if you have developed specific checklists that differ from but resemble 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'



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

Click on the green bar and the checklists will be hidden.

my checklists

**My checklists** ⓘ

Help me 1e

Schedule inspections Set causes Set filters rs

Create a brand-new checklist

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

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 ne

**My checklists** Schedule inspections Set causes Set filters :RS

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

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 and rework them to customise for own use.

