Easy to Inspect
check, report analyse

User guide

Filter based email

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User guide

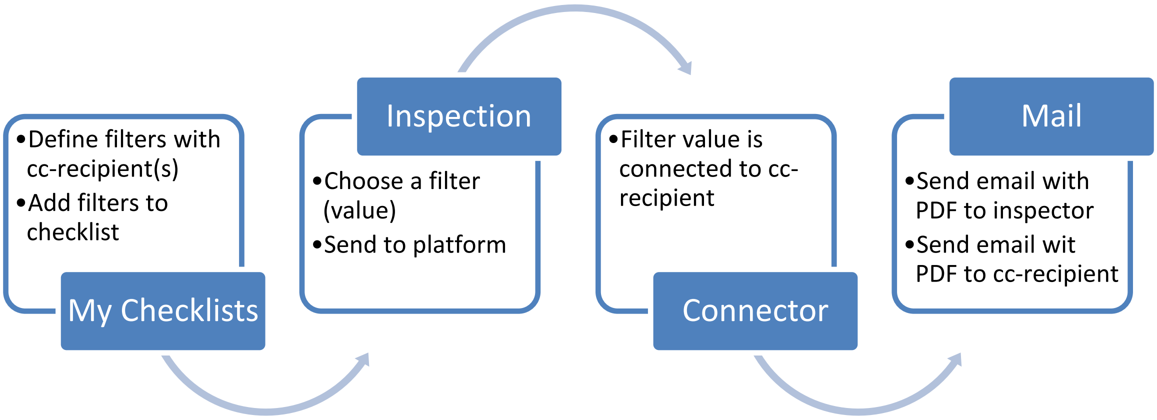
1. Purpose of this document

To provide you with details on purpose and working of the “filter based email” module and provide the setup and usage instructions.

2. Use case

This option lets you automatically share the results of an inspection with other users, sending them a copy of the inspection report and/or assigning actions and notifying the person responsible by automated email. You'll need to use the filter function to create pre-defined lists.

In practice this module consists of two separate functions:
1. The feature to send a copy of the inspection report email to email addresses that are linked to filter values.
2. The feature to assign actions automatically and send a copy of the inspection report to action takers that are linked to filter values.



3. Extra module

The “filter based email” is an extra module, that requires an additional fee. You can add the “filter based email” to your subscription via “Settings | My Subscription”.

4. Activation

First you must add the module to your subscription. After you have received the subscription confirmation in your mailbox, the module will be activated.

Please go to “Settings | My company”. Under the section “Advanced settings” you will find two headings “Send copy of the inspection report email (CC)” and “Assign actions automatically and send copy inspection report email (CC)”.

Send copy of the inspection report email (CC)

Use this option to send a copy of the inspection report email to pre-defined recipients based on a filter value in the checklist. Please go to our online documentation here: https://www.easytoinspect.com/site/support

Disabled

Assign actions automatically and send copy inspection report email (CC)

In case of a not-OK answer, assign the action directly to a pre-defined action taker and inform the action taker by email with a copy of the inspection report email (CC). This option uses pre-defined actiontakers/recipients based on a filter value in the checklist. Please go to our online documentation here: https://www.easytoinspect.com/site/support

Disabled

Use the “Send copy of the inspection report email (CC)” option to activate the sending of copy reports. Use the “Assign actions automatically and send copy inspection report email (CC)” to activate assigning actions automatically.

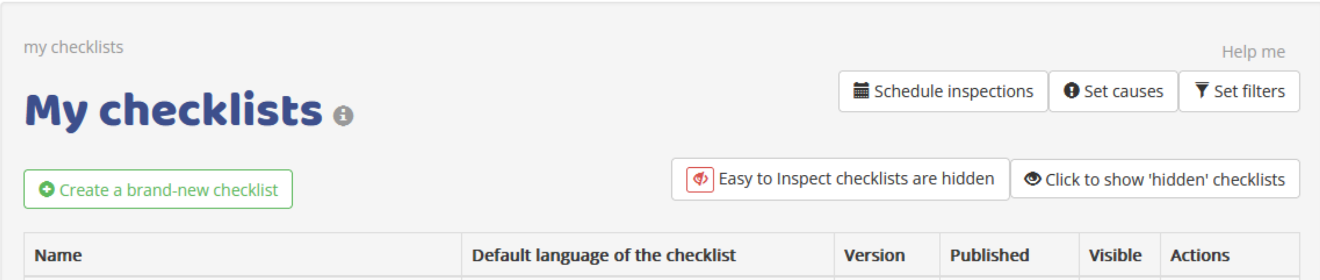
Both functions can be enabled as follows:

- Active for all checklists (App only)
  This will activate the function for all checklists, but only if there are filled in and uploaded from the mobile App.
- Active for selected checklists (App only)
  This will activate the function for all checklists, but only if there are filled in and uploaded from the mobile App. In the menu “My checklists” tab ‘report settings’ in the Create your checklist wizard, you must select the option to send an email (see chapter 5).
- Active for all checklists (App and online)
  This will activate the function for all checklists, both when they filled in and uploaded from the mobile App and with our online inspection module.
- Active for selected checklists (App and online)
  This will activate the function for selected checklists, both when they filled in and uploaded from the mobile App and with our online inspection module. In the menu “My checklists” tab ‘report settings’ in the Create your checklist wizard, you must select the option to send an email (see chapter 5).

5. Setup of the filters

You need to setup the filters, you will be using in the checklists.

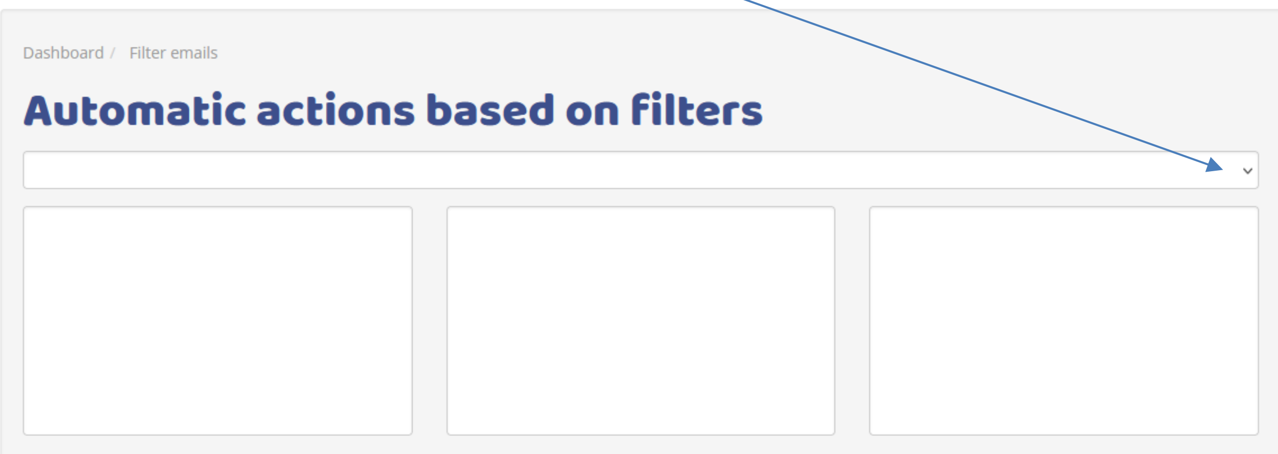
Step 1: Go to My Checklists and select “Set filters”.

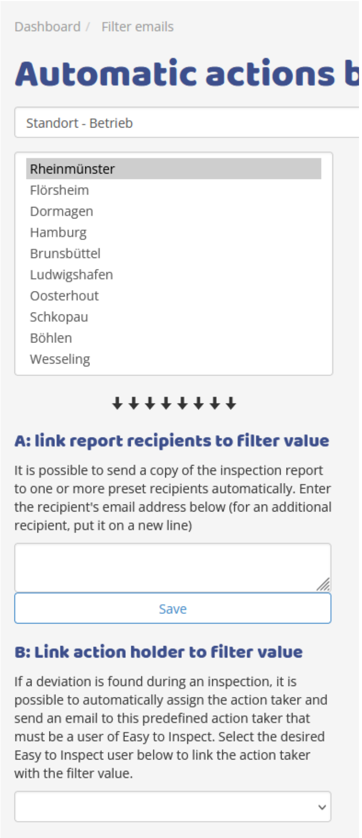


Please note, you will have to use an existing filter!

Step 2: Click on the Advanced button.

Step 3: Select the filter you want to setup





Step 4:
Select the filter(value)

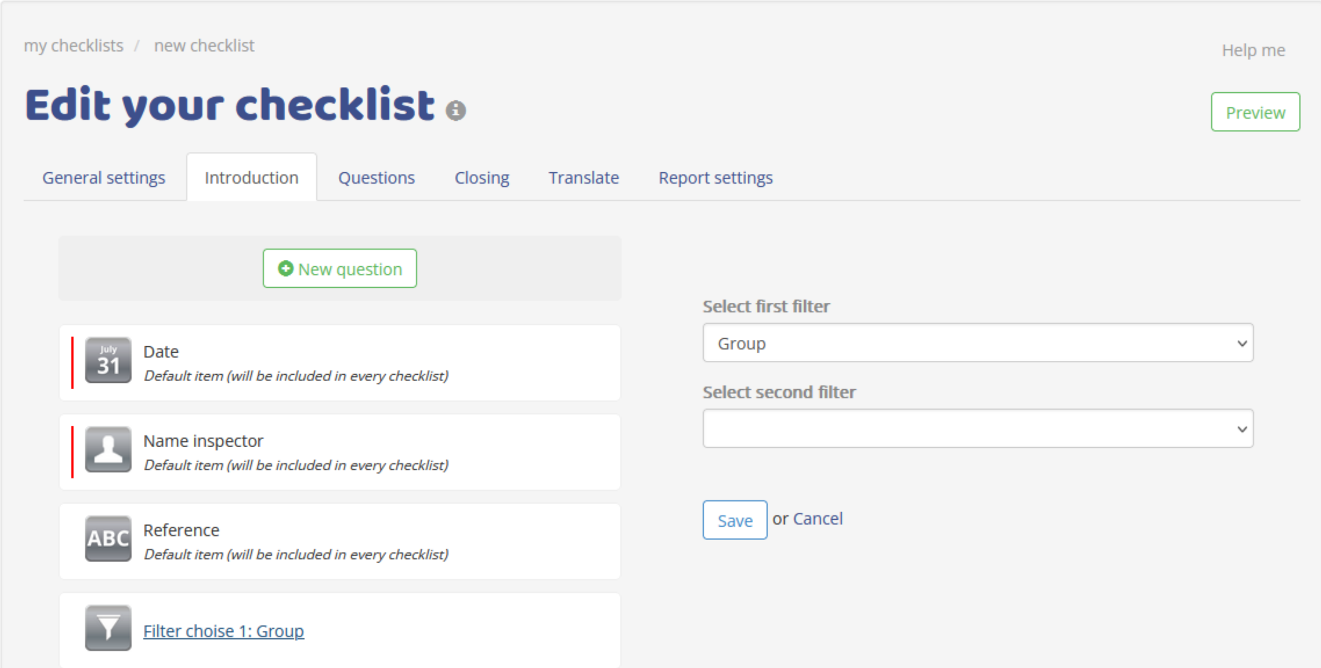
Step 5:
At the option: “A: link report recipients to filter value”
Enter de email address of the recipient

Step 6:
At the option: “B: Link action holder to filter value”
Select the user to who you want to assign the action.
All actions generated by the system for Not OK answers in ‘Ok/NOK/N.A.’ & ‘Score with a percentage’ question-types, will be assigned to the action taker linked to this filter value.

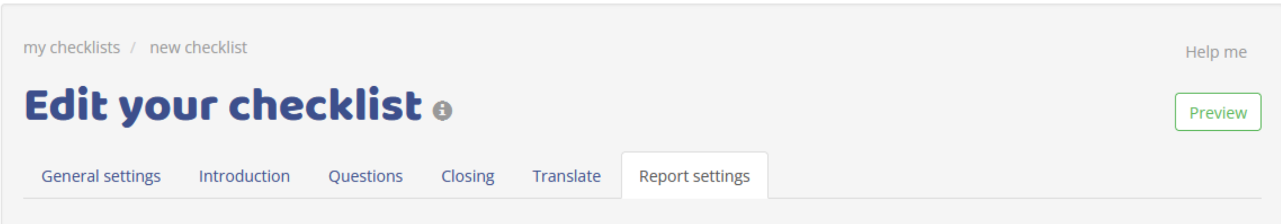
Note with step 5:
You can setup this up for any of the 3 levels of a filter. If there are recipients defined on more than one level, all recipients will receive the email.

Note with step 6:
Since only one action taker can be defined with each action, the action taker defined on the lowest level will be used to assign the action.

Step 7: Add the filter to the checklist. Go to My Checklists and Edit the checklist. In the Tab Introduction, select the correct filter and press Save.



Step 8: If you have selected the option "Selected checklists", you will have to enable this function in your specific checklist. Edit the checklist, go to the tab 'Report settings' in the checklist wizard.



At the bottom of the screen, you will find the options to enable the functions for this checklist.