



Manage actions (action tracker)

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1. Purpose of this document

When you use the OK/NOK/NA or score with a percentage question type, as a default, non conformities are created in case of Not OK scores. In this guidance we'll explain how to assign the actions, complete actions and how to check on effectiveness.

2. Definitions

Nonconformity	A deviation found during an inspection and resulting in the issuing of a nonconformity by Easy to Inspect in case of NOK-answers during an inspection (when using the OK, Not OK and N.A. answer type) or answers that score below a pre-defined percentage in case of score with a 'score with a percentage question-type).
Responsible Action Taker	The persons to who an action is assigned. This action can be a request to remediate an issue found during an inspection but also be a request to verify if an action was implemented and effective (verification).
Action request	The request to take action to correct a nonconformity
Verification request	The request to verify if the corrective action was implemented and effective.



3. How to find the nonconformities

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

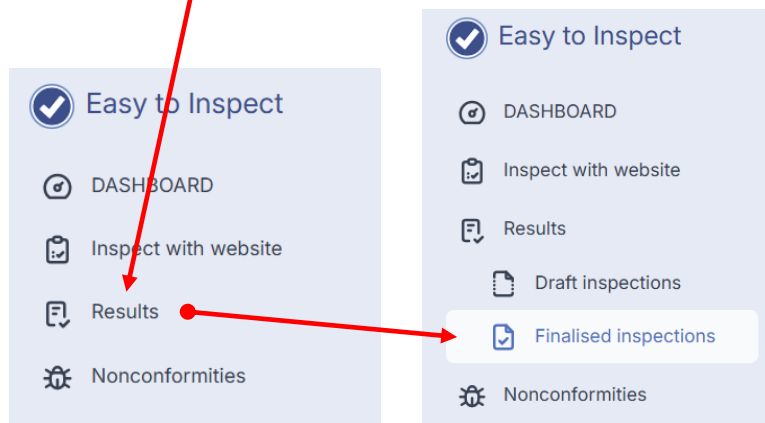
Notice: In case a checklist is not completed or uploaded as a draft inspection, the inspection report will be displayed at “Draft inspection”. No nonconformity reports will be generated. Creation of nonconformity reports only take place when the report is uploaded as finalised version.

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

3.1. Find nonconformities via the Finalised Inspection menu.

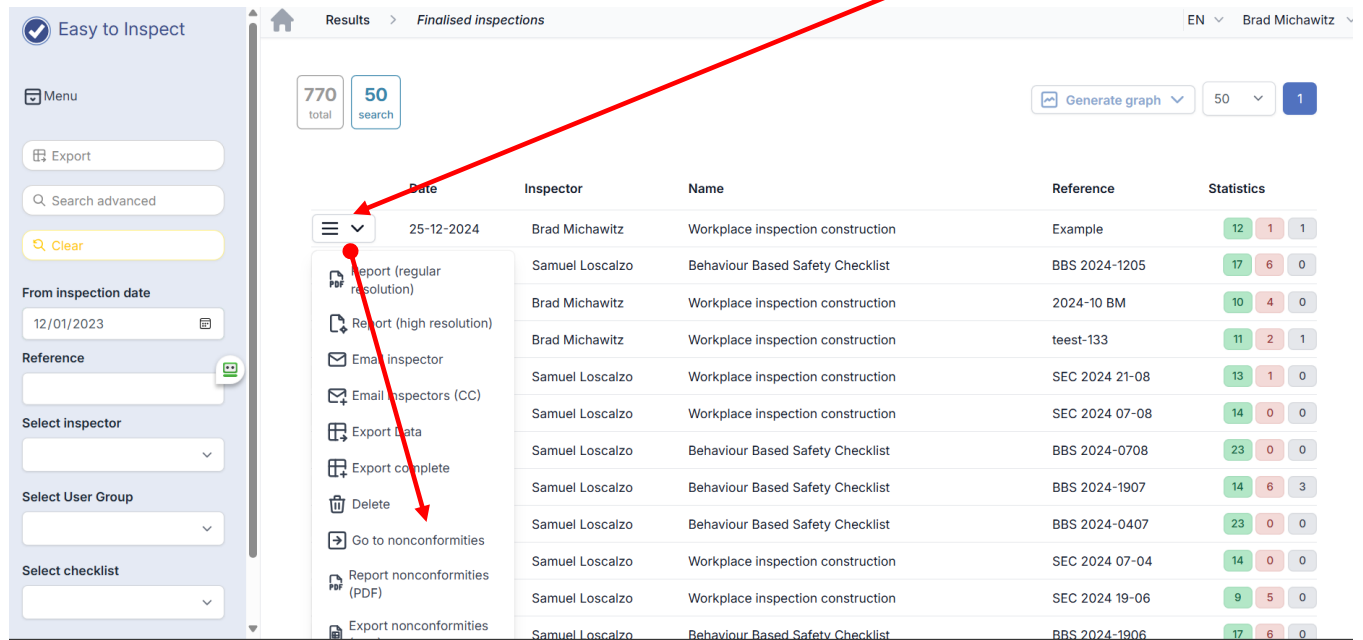
Login with your email and password on the website of www.easytoinspect.com.

Select the menu option in the left hand side bar and choose “Results” and then ‘Finalised Inspections’



Then select your inspection report.

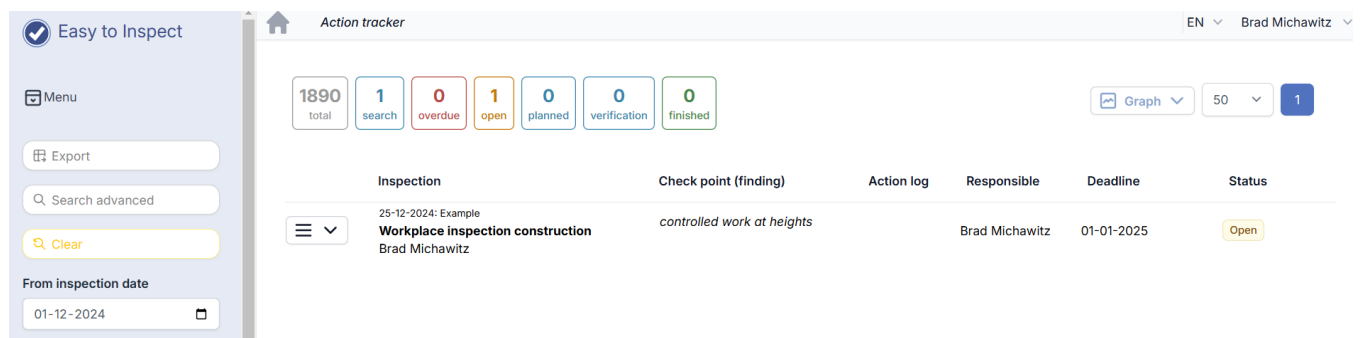
Now now click on the “Action” button and select ‘go to non conformities’.



The screenshot shows the 'Finalised Inspections' dashboard. On the left, there is a sidebar with a menu containing various actions. A red arrow points from the 'Go to nonconformities' button in this menu to the corresponding row in the main table. The table has columns for Date, Inspector, Name, Reference, and Statistics. The row selected is for the date 25-12-2024, Inspector Brad Michawitz, Name Workplace inspection construction, and Reference Example. The statistics for this row are 12 (green), 1 (red), and 1 (grey).

Date	Inspector	Name	Reference	Statistics
25-12-2024	Brad Michawitz	Workplace inspection construction	Example	12 1 1
	Samuel Loscalzo	Behaviour Based Safety Checklist	BBS 2024-1205	17 6 0
	Brad Michawitz	Workplace inspection construction	2024-10 BM	10 4 0
	Brad Michawitz	Workplace inspection construction	teest-133	11 2 1
	Samuel Loscalzo	Workplace inspection construction	SEC 2024 21-08	13 1 0
	Samuel Loscalzo	Workplace inspection construction	SEC 2024 07-08	14 0 0
	Samuel Loscalzo	Behaviour Based Safety Checklist	BBS 2024-0708	23 0 0
	Samuel Loscalzo	Behaviour Based Safety Checklist	BBS 2024-1907	14 6 3
	Samuel Loscalzo	Behaviour Based Safety Checklist	BBS 2024-0407	23 0 0
	Samuel Loscalzo	Workplace inspection construction	SEC 2024 07-04	14 0 0
	Samuel Loscalzo	Workplace inspection construction	SEC 2024 19-06	9 5 0
	Samuel Loscalzo	Behaviour Based Safety Checklist	BBS 2024-1906	17 6 0

The Action tracker dashboard will open with an overview of the nonconformity reports of this specific inspection.



The screenshot shows the 'Action tracker' dashboard. At the top, there is a summary of actions: 1890 total, 1 search, 0 overdue, 1 open, 0 planned, 0 verification, and 0 finished. Below this is a table with columns for Inspection, Check point (finding), Action log, Responsible, Deadline, and Status. The table shows one action for the inspection '25-12-2024: Example Workplace inspection construction' by Brad Michawitz, with a check point of 'controlled work at heights', responsible person 'Brad Michawitz', deadline '01-01-2025', and status 'Open'.

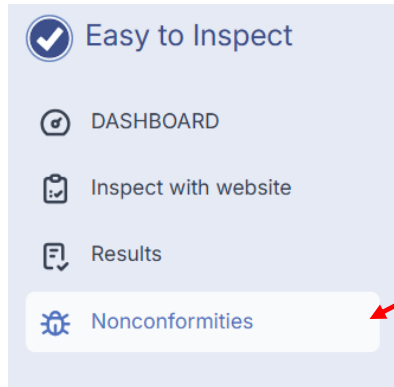
Inspection	Check point (finding)	Action log	Responsible	Deadline	Status
25-12-2024: Example Workplace inspection construction Brad Michawitz	controlled work at heights		Brad Michawitz	01-01-2025	Open



3.2. Find actions via the 'non conformities' menu

Login with your email and password on the website of www.easytoinspect.com.

Select the menu option in the left hand side bar and select 'Nonconformities'



An overview is generated with all nonconformity reports of all inspections that you have access to as a user:

- ✔ Non conformities of your own inspection.
- ✔ Non conformities of inspections of users that are assigned to groups and over whom you have permissions.

You can drill down to your specific inspection results.

Notice: Easy to Inspect will open with the selection of your previous search. It might be needed to select the "Clear" button to display all entries and select your search entries from there.

Menu

Export

Search advanced

Clear

From inspection date
01-12-2023

Reference

Select inspector

Select responsible person

Select User Group

Select checklist

Select status
Open



In underneath example you can see that user Brad has searched for all non conformance reports that must be handled by Samuel. Either because the actions need to be assigned to action takers (status 'open') or because Samuel needs to complete the action (status 'planned' or 'replanned') or verify the action on effectiveness (status 'verification').

The screenshot shows the 'Action tracker' interface. On the left is a sidebar menu with filters for 'Export', 'Search advanced', 'Clear', 'From inspection date' (01-07-2024), 'Reference', 'Select inspector' (Samuel Loscalzo), 'Select responsible person', 'Select User Group', 'Select checklist' (Behaviour Based Safety), and 'Select status' (Open). The main area displays a table of actions:

Inspection	Check point (finding)	Action log	Responsible	Deadline	Status
19-07-2024: BBS 2024-1907 Behaviour Based Safety Checklist Samuel Loscalzo	safe working method Employee was working without helmet near the working crane		Samuel Loscalzo	11-07-2024	Open
19-07-2024: BBS 2024-1907 Behaviour Based Safety Checklist Samuel Loscalzo	adhering to HSE instructions Various materials near the fence		Samuel Loscalzo	11-07-2024	Open
19-07-2024: BBS 2024-1907 Behaviour Based Safety Checklist Samuel Loscalzo	use of safe and inspected tools / equipment		Samuel Loscalzo	11-07-2024	Open
19-07-2024: BBS 2024-1907 Behaviour Based Safety Checklist Samuel Loscalzo	supervision of colleagues Employee with swivel range of the crane, without reason		Samuel Loscalzo	11-07-2024	Open
19-07-2024: BBS 2024-1907 Behaviour Based Safety Checklist Samuel Loscalzo	attention to safety of third parties Improper road signs; risks for third parties		Samuel Loscalzo	11-07-2024	Open
19-07-2024: BBS 2024-1907 Behaviour Based Safety Checklist Samuel Loscalzo	action taken at observed unsafe conditions Employee working without proper road barrier on open road		Samuel Loscalzo	11-07-2024	Open

When you would search for the nonconformities of the inspection with reference number "Example", fill in this reference and you will find all NC's belonging to this inspection result.

The screenshot shows the 'Finalised inspections' interface. The sidebar menu is similar to the previous screenshot, but the 'Select status' is set to 'Finalised'. The main area displays a table of inspection results:

Date	Inspector	Name	Reference	Statistics
25-12-2024	Brad Michawitz	Workplace inspection construction	Example	12 1 1

Red arrows point from the 'Reference' field in the sidebar (containing 'Example') to the 'Reference' column in the table and to the search filter icon above the table.



4. Action management in general

Actions can be assigned by any inspector that has user rights.

As a default the entitled users are:

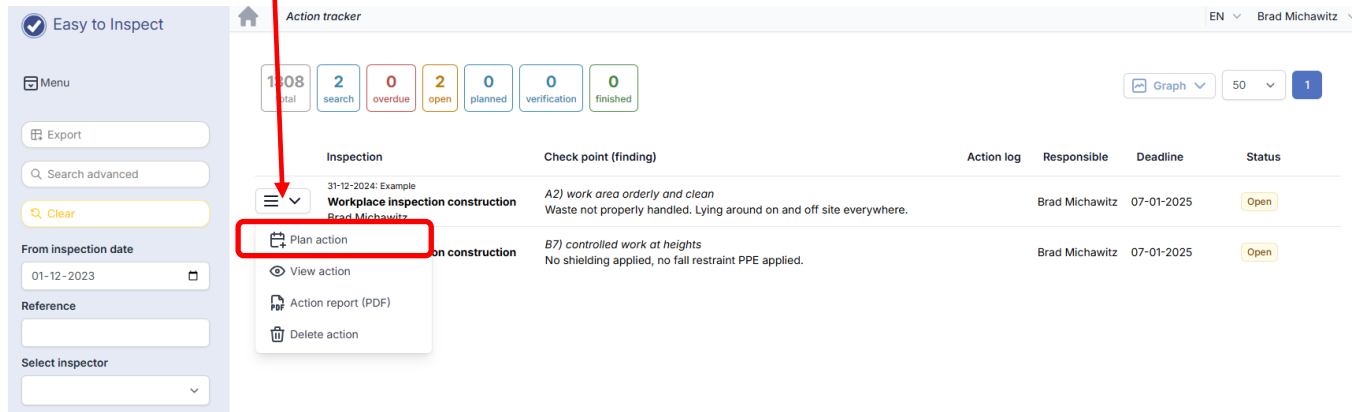
- 1) The user that carried out the inspection
- 2) The system administrator
- 3) All users that are entitled to do so via the User groups (see user rights manual).

Actions can be dealt with by Easy to Inspect users who are included in your account only

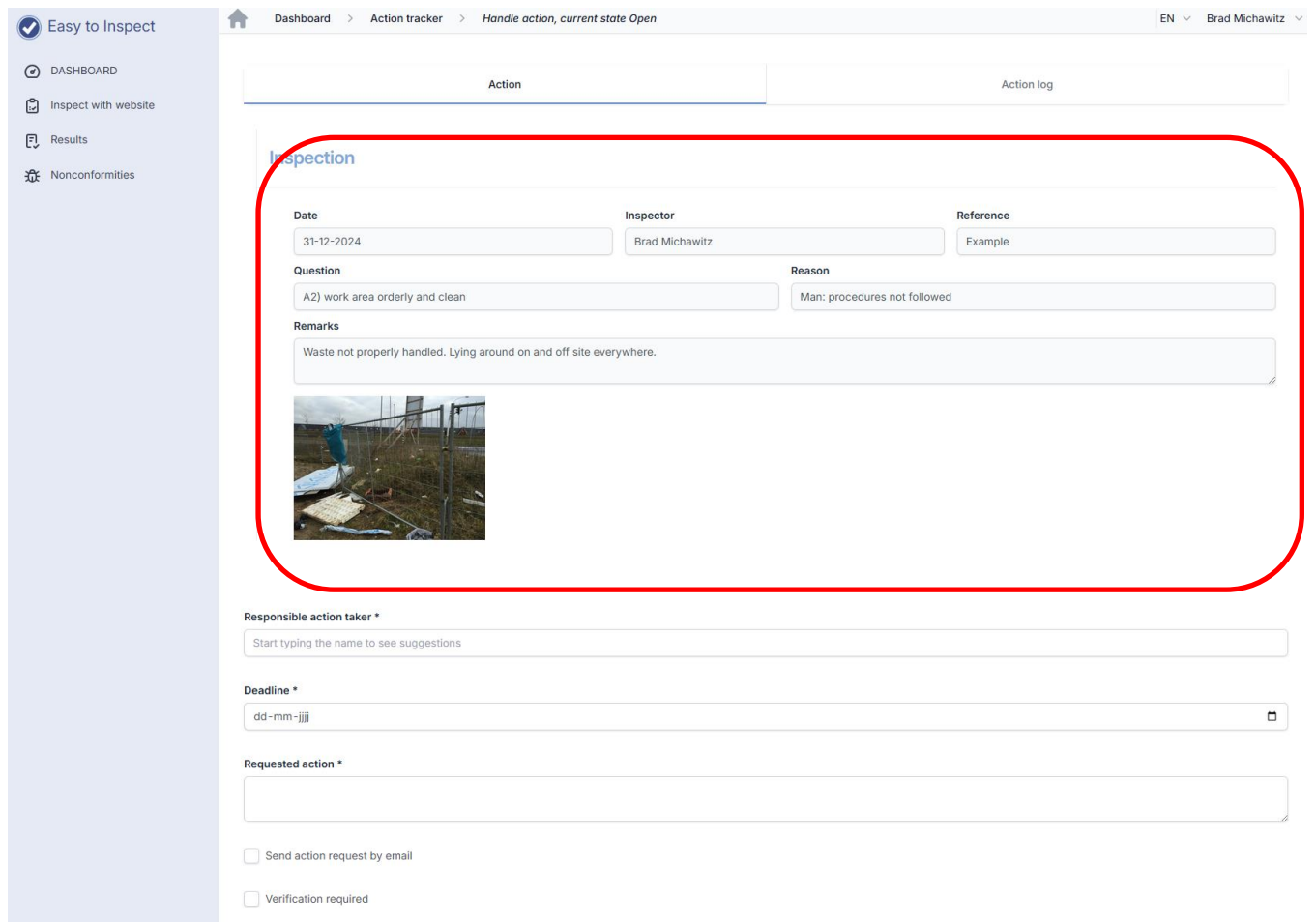
After an action is assigned to an action taker, the action taker will receive an email notification (if selected) and / or find the action in his/her users action tracker dashboard.

4.1. Assign the Action

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



A screen will be displayed that can be completed with all relevant data of the nonconformance observed (see red frame):





Now you can:

- 1) Include the user to who you send the action request, mark a deadline for the action and define the action to be taken (if known).
- 2) When you would like the action taker to be informed by mail, click the tick box to send an 'action request' invitation.

Note: If you would like to take an action taker, just start typing the name. A scroll down list will appear with all the possible options.

Responsible action taker *

- Samuel Loscalzo
- Deanne

02-01-2025

Requested action *

Clean up the work area (and outside), organise waste containers and reinstruct workers.

Send action request by email

Verification required

Save Cancel

If you would like to be certain that the action not only is completed but also effective, once the action is reported as carried out, you can also select the verification required tick box.

Verification required

Verifier

Deadline in # days, after the action is completed

Send verification request by email

Save Cancel



You can define which Easy to Inspect user is requested to carry out the effectiveness check and define within what period of time the verification must be done.

We have set the default period on 7 days. However, you can change this.

Press “Save”, when you have entered all details of your action- (and verification) request. Only after “Save” the action request will be stored and assigned and will the action request email be send.

Verification required

Verifier

Brad Michawitz

Deadline in # days, after the action is completed

30

Send verification request by email

Save

Cancel



4.2. The action taker

The action taker will receive an invitation to take action by email if you selected that option.

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

Because of security reasons, the action taker has to login in the Easy to Inspect Dashboard and select the menu “Nonconformities”.

The action taker can then select the actions he would like to view and act on. For instance, with the settings: ‘Responsible user’

The screenshot shows the 'Action tracker' dashboard. On the left, there is a sidebar with various filters. The 'Responsible user' dropdown is set to 'Samuel Loscalzo'. The main area displays a table of actions with columns for Inspection, Check point (finding), Action log, Responsible, Deadline, and Status.

Inspection	Check point (finding)	Action log	Responsible	Deadline	Status
31-12-2024: Example Workplace inspection construction Brad Michawitz	A2) work area orderly and clean Waste not properly handled. Lying around on and off site everywhere.	Clean up within and outside the perimeter, organise sufficient waste containers, re-instruct site wo ...	Samuel Loscalzo	31-12-2024	Planned

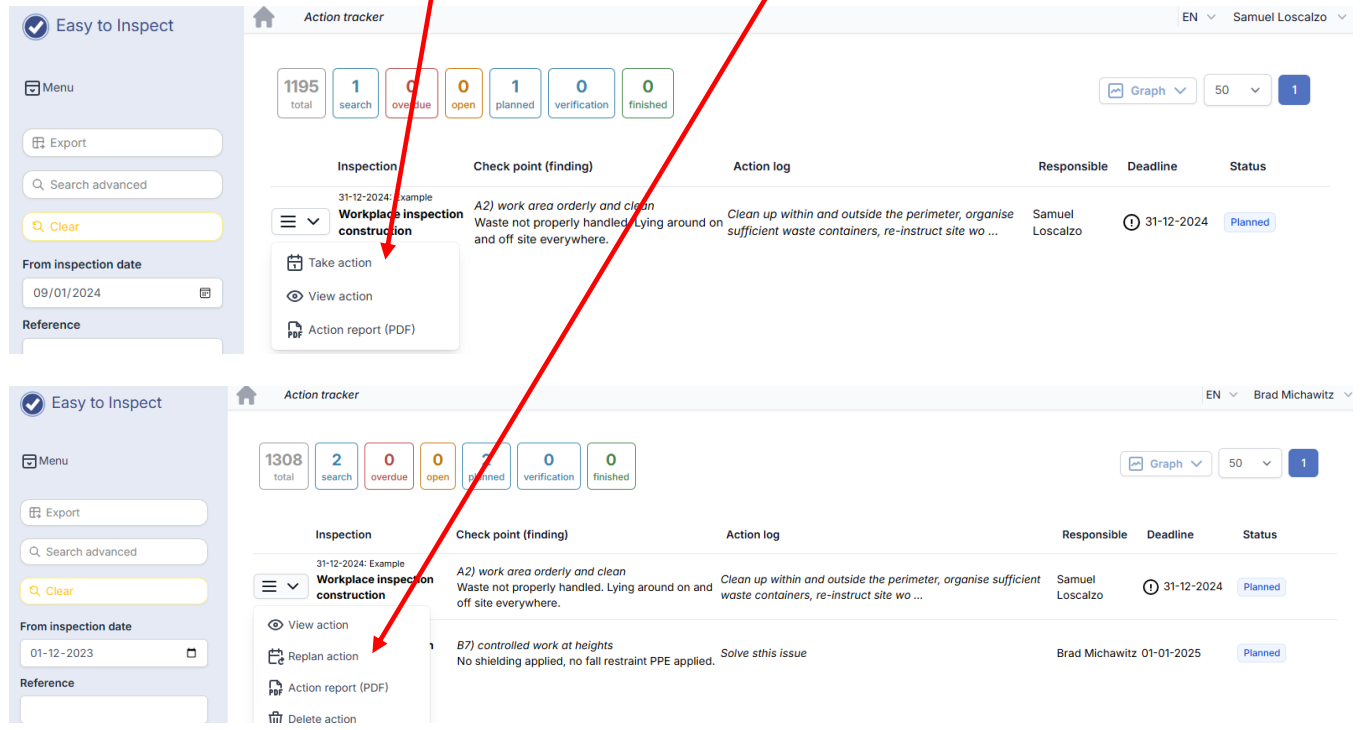
In the above example, Samuel Loscalzo now sees all actions that are assigned to him.

When Samuel clicks on the Action Button, he can select if ye would like to:

- take action
- view the action
- or print the nonconformity report

With the 'replan'- option, the user can assign the action request to another user of Easy to Inspect. Of course, this is option is only displayed when a user is entitled to do so in his/her role.

Compare the user rights of Samuel with the rights of Brad:



The screenshots compare the user rights of Samuel Loscalzo and Brad Michawitz. Samuel's interface shows a dropdown menu with 'Take action', 'View action', and 'Action report (PDF)'. Brad's interface shows a dropdown menu with 'View action', 'Replan action', 'Action report (PDF)', and 'Delete action'. Red arrows highlight the 'Replan action' option in Brad's interface.

Inspection	Check point (finding)	Action log	Responsible	Deadline	Status
31-12-2024: Example Workplace inspection construction	A2) work area orderly and clean Waste not properly handled. Lying around on and off site everywhere.	Clean up within and outside the perimeter, organise sufficient waste containers, re-instruct site wo ...	Samuel Loscalzo	31-12-2024	Planned
31-12-2024: Example Workplace inspection construction	B7) controlled work at heights No shielding applied, no fall restraint PPE applied.	Solve sthis issue	Brad Michawitz	01-01-2025	Planned

4.3. Take the action

By selecting 'Take action' the user can enter the measures that were taken to solve the issue.

Requested action

Clean up within and outside the perimeter, organise sufficient waste containers, re-instruct site worker about waste handling/segregation.

Action date

12/31/2024

Measure taken

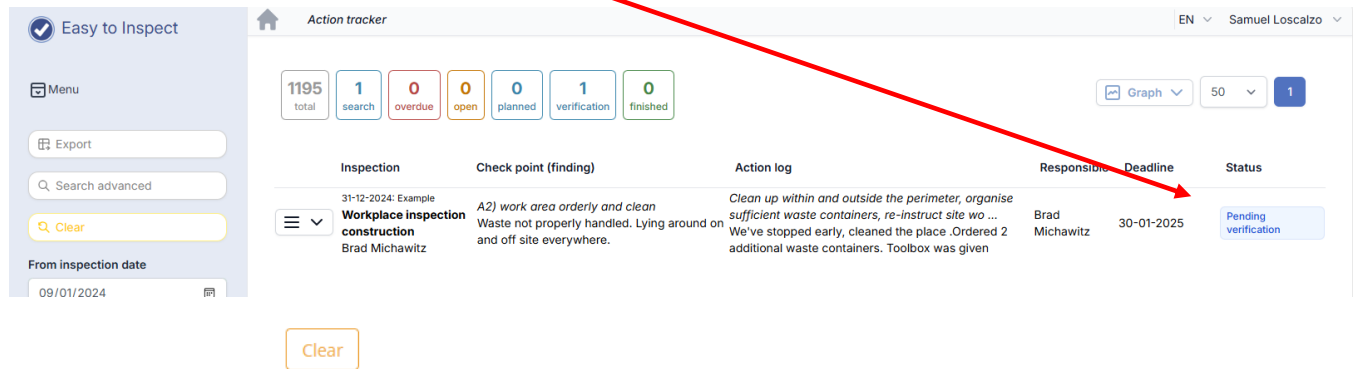
We've stopped early, cleaned the place. Ordered 2 additional waste containers. Toolbox was given

Choose Files No file chosen

Save Cancel

Once the action is taken, included in the Action report and saved, the status of the Action will change.

In this case to Pending Verification:



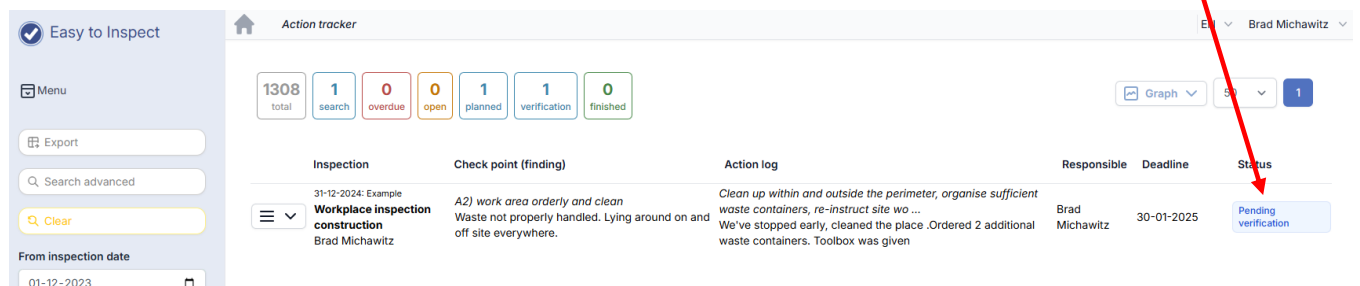
Easy to Inspect | Action tracker | EN | Samuel Loscalzo

1195 total | 1 search | 0 overdue | 0 open | 0 planned | 1 verification | 0 finished

Inspection	Check point (finding)	Action log	Responsible	Deadline	Status
31-12-2024: Example Workplace inspection construction Brad Michawitz	A2) work area orderly and clean Waste not properly handled. Lying around on and off site everywhere.	Clean up within and outside the perimeter, organise sufficient waste containers, re-instruct site wo ... We've stopped early, cleaned the place .Ordered 2 additional waste containers. Toolbox was given	Brad Michawitz	30-01-2025	Pending verification

Clear

In the overview of the responsible action taker (verifier), you now see the action displayed.



Easy to Inspect | Action tracker | EN | Brad Michawitz


1308 total | 1 search | 0 overdue | 0 open | 1 planned | 1 verification | 0 finished

Inspection	Check point (finding)	Action log	Responsible	Deadline	Status
31-12-2024: Example Workplace inspection construction Brad Michawitz	A2) work area orderly and clean Waste not properly handled. Lying around on and off site everywhere.	Clean up within and outside the perimeter, organise sufficient waste containers, re-instruct site wo ... We've stopped early, cleaned the place .Ordered 2 additional waste containers. Toolbox was given	Brad Michawitz	30-01-2025	Pending verification

4.4. Replan the Action

When a user feels that he/she is not the right person to organise the action, he/she could replan the action when user rights permit so.

Notice: This user right is only granted when the user is part of a group and has permission to act on inspections of the original inspector that conducted the inspection and assigned the action. If this is not organised, the user can only take action.

Action		Action log
<p>Inspection</p>		
<p>Date</p> <input type="text" value="31-12-2024"/>	<p>Inspector</p> <input type="text" value="Brad Michawitz"/>	<p>Reference</p> <input type="text" value="Example"/>
<p>Question</p> <input type="text" value="B7) controlled work at heights"/>	<p>Reason</p> <input type="text" value="Method: no working method in place"/>	
<p>Remarks</p> <input type="text" value="No shielding applied, no fall restraint PPE applied."/>		
		
<p>Choose a new action status of this action, to reschedule/reopen this action</p> <input type="text" value="Select the new state"/>		



Select the new state (planned) and fill out the fields for replanning. You can put additional comments in the Requested action field.

Choose a new action status of this action, to reschedule/reopen this action

Planned ▼

Responsible action taker

Robert Fisker

Deadline

01/01/2025 📅

Requested action

@Robert; this is not an action I (Samuel) can organise. Would you take this up: - The process must be re-implemented: Either we build a scaffold with [barriers](#) or we apply fall restraint harnesses with fall line that can be connected to a hook up point. Current way of working is unacceptable. Please take immediate action and assure the process is applied in future.

Verification required

Verifier

Brad Michawitz

Deadline in # days, after the action is completed

15



In the action history you can view all actions requests, replanning etc.

So, underneath action was issued by Brad to Samuel and replanned by Samuel to Robert. The additional comments are displayed too.

Overview	Action log
<p>Brad Michawitz @ 31-12-2024 09:12</p> <p>Action deadline at 01-01-2025 Action requested Solve sthis issue Action taker Brad Michawitz Deadline at 01-01-2025 Date issued 31-12-2024 Action requester Brad Michawitz Stakeholders Brad Michawitz , Brad Michawitz , Brad Michawitz Status Planned</p>	
<p>Brad Michawitz @ 31-12-2024 10:12</p> <p>Action requested The process must be re-implemented: Either we build a scaffold with barriers or we apply fall restraint harnesses with fall line that can be connected to a hook up point. Current way of working is unacceptable. Please take immediate action and assure the process is applied in future. Action taker Samuel Loscalzo Stakeholders Brad Michawitz , Brad Michawitz , Samuel Loscalzo , Brad Michawitz Current state user Samuel Loscalzo Deadline in # days, after the action is completed 15 Verification required true Verifier Brad Michawitz</p>	
<p>Samuel Loscalzo @ 31-12-2024 10:12</p> <p>Action requested @Robert; this is not an action I (Samuel) can organise. Would you take this up: - The process must be re-implemented: Either we build a scaffold with barriers or we apply fall restraint harnesses with fall line that can be connected to a hook up point. Current way of working is unacceptable. Please take immediate action and assure the process is applied in future. Action taker Robert Fisker Action requester Samuel Loscalzo Stakeholders Brad Michawitz , Samuel Loscalzo , Robert Fisker, Brad Michawitz Current state user Robert Fisker</p>	

After Replanning, the action is visible in the Action Tracker, but no longer under the responsible Samuel. The action is now assigned to Robert. The action status is still Planned.

1196
total

1
search

0
overdue

0
open

1
planned

1
verification

0
finished

Graph
v

50
v

1

Inspection	Check point (finding)	Action log	Responsible	Deadline	Status
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"> 31-12-2024: Example Workplace inspection construction Brad Michawitz </div> <div style="font-size: 0.8em;"> B7) controlled work at heights No shielding applied, no fall restraint PPE applied. </div> </div>	<div style="font-size: 0.8em;"> @Robert; this is not an action I (Samuel) can organise. Would you take this up: - The process must b ... </div>	Robert Fisker	01-01-2025	Planned	

The action status is still "Planned".



4.5. Verify the effectiveness of action

Once the action is carried out and confirmed, a verification might take place when selected.

In the action tracker, these verification actions can be selected by the user, by clicking on the status "verification"

The screenshot displays the 'Action tracker' interface. On the left, a sidebar contains various filters, including 'Select status' which is set to 'Verification'. The main area shows a table of actions with columns for Inspection, Check point (finding), Action log, Responsible, Deadline, and Status. A specific action is highlighted, showing a finding about waste management and an action log describing cleanup and waste container management. The responsible person is Brad Michawitz, and the deadline is 30-01-2025. The status is 'Pending verification'.

Inspection	Check point (finding)	Action log	Responsible	Deadline	Status
31-12-2024: Example Workplace inspection construction Brad Michawitz	A2) work area orderly and clean Waste not properly handled. Lying around on and off site everywhere.	Clean up within and outside the perimeter, organise sufficient waste containers, re-instruct site wo ... We've stopped early, cleaned the place. Ordered 2 additional waste containers. Toolbox was given	Brad Michawitz	30-01-2025	Pending verification

In our example you can see, that Samuel took action and that Brad now has to verify if this actually improved the waste management on the construction site.

The deadline for this verification was set on 30 days after the action completion. Brad now needs to verify the effectiveness before 30-01-2025.



In the action log, you can see the steps taken so far and the routing of the non conformity.

	Action	Action log
Brad Michawitz @ 31-12-2024 09:12		
Action deadline at	31-01-2024	
Send action request by email	true	
Action requested	Clean up within and outside the perimeter, organise sufficient waste containers, re-instruct site worker about waste handling/segregation.	
Action taker	Brad Michawitz	
Deadline at	31-01-2024	
Date issued	31-12-2024	
Action requester	Brad Michawitz	
Stakeholders	Brad Michawitz , Brad Michawitz , Brad Michawitz , Brad Michawitz	
Status	Planned	
Deadline in # days, after the action is completed	30	
Verification required	true	
Verifier	Brad Michawitz	
Brad Michawitz @ 31-12-2024 09:12		
Action deadline at	31-12-2024	
Action taker	Samuel Loscalzo	
Deadline at	31-12-2024	
Stakeholders	Brad Michawitz , Brad Michawitz , Samuel Loscalzo , Brad Michawitz	
Current state user	Samuel Loscalzo	
Samuel Loscalzo @ 31-12-2024 10:12		
Measure taken on	31-12-2024	
Measure taken	We've stopped early, cleaned the place .Ordered 2 additional waste containers. Toolbox was given	
Deadline at	30-01-2025	
Status	Pending verification	
Current state user	Brad Michawitz	

When Brad verifies the effectiveness during a site visit, he could confirm that the way of working has improved. He will fill in the verification comment and save approve or disapprove on the effectiveness. The action report will be closed after approval and the status will change into "completed".

Verification date
31-12-2024

Verification comments
I visited 05-01-2025. Site housekeeping and waste management improved.Sufficient waste containers in place. Records of toolbox observed.

Verification outcome
select result
select result
Not approved
Approved Clear
bestanden kiezen | Geen bestand gekozen

Save Cancel



Verification date

31-12-2024

Verification comments

I visited 05-01-2025. Site housekeeping and waste management improved. Sufficient waste containers in place. Records of toolbox observed.

Verification outcome

Approved

Bestanden kiezen Geen bestand gekozen

Save Cancel

Easy to Inspect

Menu

Export

Search advanced

Clear

From inspection date

Action tracker

EN Brad Michawitz

1875 total 1 search 0 overdue 0 open 1 planned 0 verification 1 finished

Graph 50 1

Inspection	Check point (finding)	Action log	Responsible	Deadline	Status
31-12-2024: Example Workplace inspection construction Brad Michawitz	A2) work area orderly and clean Waste not properly handled. Lying around on and off site everywhere.	Clean up within and outside the perimeter, organise sufficient waste containers, re-instruct site wo ... We've stopped early, cleaned the place .Ordered 2 additional waste containers. Toolbox was given			Complete



In the action history you find all actions taken on this nonconformity. (Please note that this view is initially empty, only changes are logged here.)

Brad Michawitz @ 31-12-2024 09:12	
Action deadline at	31-01-2024
Send action request by email	true
Action requested	Clean up within and outside the perimeter, organise sufficient waste containers, re-instruct site worker about waste handling/segregation.
Action taker	Brad Michawitz
Deadline at	31-01-2024
Date issued	31-12-2024
Action requester	Brad Michawitz
Stakeholders	Brad Michawitz , Brad Michawitz , Brad Michawitz , Brad Michawitz
Status	Planned
Deadline in # days, after the action is completed	30
Verification required	true
Verifier	Brad Michawitz
Brad Michawitz @ 31-12-2024 09:12	
Action deadline at	31-12-2024
Action taker	Samuel Loscalzo
Deadline at	31-12-2024
Stakeholders	Brad Michawitz , Brad Michawitz , Samuel Loscalzo , Brad Michawitz
Current state user	Samuel Loscalzo
Samuel Loscalzo @ 31-12-2024 10:12	
Measure taken on	31-12-2024
Measure taken	We've stopped early, cleaned the place .Ordered 2 additional waste containers. Toolbox was given
Deadline at	30-01-2025
Status	Pending verification
Current state user	Brad Michawitz
Brad Michawitz @ 31-12-2024 10:12	
Deadline at	
Status	Complete
Current state user	
Verification comments	I visited 05-01-2025. Site housekeeping and waste management improved.Sufficient waste containers in place. Records of toolbox observed.
Verification date	31-12-2024
Verification outcome	true



4.5. Reopen an action

If you think that additional actions must be taken. You can re-open completed actions. Such can only be done for actions of your own inspections or for actions created by inspectors over whom you have permissions to do so (they must be part of your Group).

1875 total | 1 search | 0 overdue | 0 open | 1 planned | 0 verification | 1 finished

Graph | 50 | 1

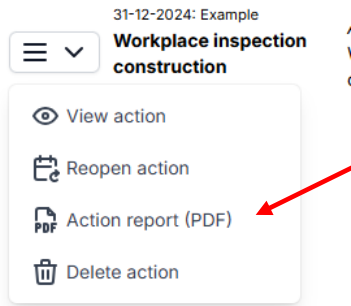
Inspection	Check point (finding)	Action log	Responsible	Deadline	Status
31-12-2024: Example Workplace inspection construction	A2) work area orderly and clean Waste not properly handled. Lying around on and off site everywhere.	Clean up within and outside the perimeter, organise sufficient waste containers, re-instruct site wo ... We've stopped early, cleaned the place .Ordered 2 additional waste containers. Toolbox was given			Complete

View action
Reopen action
Action report (PDF)
Delete action



4.6. Print your Nonconformity / Action report

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





Action Report

Workplace inspection construction



Easy to Inspect
check, report analyse

Date	31-12-2024
Inspector	Brad Michawitz
Reference	Example
Construction site	Example project
Name involved employees	unknown
Name involved subcontractors	unknown
ID	6773b08401cecf0001cf8df6



Action Report

Workplace inspection construction



Easy to Inspect
check, report analyse

Finding

ID
Section
Question
Description
Answer
Reason
Remarks
Photos

6773b37601cecf0001adef1d

A) work place related risks
A2) work area orderly and clean

tripping hazards, risk of falling

● **Not okay**

Man: procedures not followed

Waste not properly handled. Lying around on and off site everywhere.



Action request

Action requested
Action taker
Action deadline
Measure taken
Measure taken on
Photos

Clean up within and outside the perimeter, organise sufficient waste containers, re-instruct site worker about waste handling/segregation.

Samuel Loscalzo

31-12-2024

We've stopped early, cleaned the place .Ordered 2 additional waste containers. Toolbox was given

31-12-2024

Verification

Verifier
Remarks
Photos

Brad Michawitz

I visited 05-01-2025. Site housekeeping and waste management improved.Sufficient waste containers in place. Records of toolbox observed.

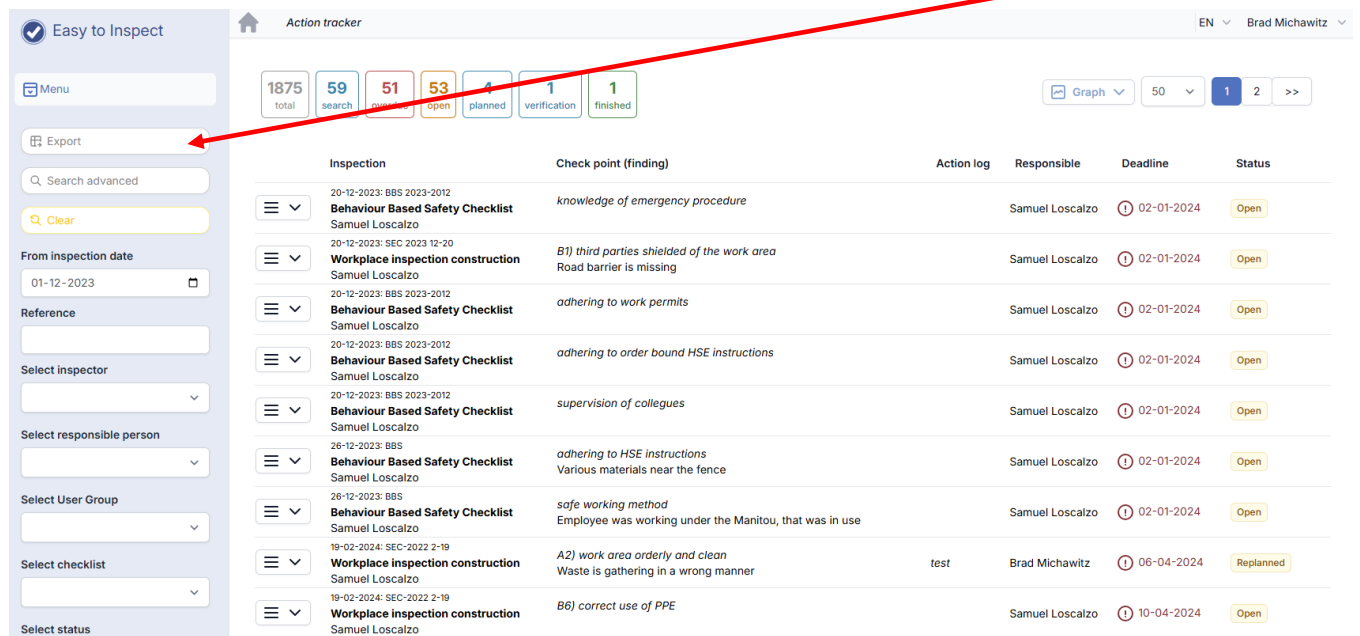
5. Export to Excel

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

Users can rather easily check in their own Action Tracker which actions are assigned to them.

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

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



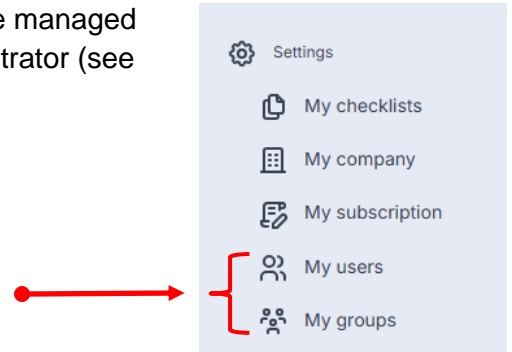
The screenshot shows the 'Action tracker' interface. On the left is a navigation menu with an 'Export' button. The main area displays a table of nonconformities with columns for Inspection, Check point (finding), Action log, Responsible, Deadline, and Status. A red arrow points from the 'Export' button in the left menu to the 'Export' button in the top right of the main content area.

Inspection	Check point (finding)	Action log	Responsible	Deadline	Status
20-12-2023: BBS 2023-2012 Behaviour Based Safety Checklist Samuel Loscalzo	knowledge of emergency procedure		Samuel Loscalzo	02-01-2024	Open
20-12-2023: SEC 2023 12-20 Workplace inspection construction Samuel Loscalzo	B1) third parties shielded of the work area Road barrier is missing		Samuel Loscalzo	02-01-2024	Open
20-12-2023: BBS 2023-2012 Behaviour Based Safety Checklist Samuel Loscalzo	adhering to work permits		Samuel Loscalzo	02-01-2024	Open
20-12-2023: BBS 2023-2012 Behaviour Based Safety Checklist Samuel Loscalzo	adhering to order bound HSE instructions		Samuel Loscalzo	02-01-2024	Open
20-12-2023: BBS 2023-2012 Behaviour Based Safety Checklist Samuel Loscalzo	supervision of colleagues		Samuel Loscalzo	02-01-2024	Open
26-12-2023: BBS Behaviour Based Safety Checklist Samuel Loscalzo	adhering to HSE instructions Various materials near the fence		Samuel Loscalzo	02-01-2024	Open
26-12-2023: BBS Behaviour Based Safety Checklist Samuel Loscalzo	safe working method Employee was working under the Manitou, that was in use		Samuel Loscalzo	02-01-2024	Open
19-02-2024: SEC-2022 2-19 Workplace inspection construction Samuel Loscalzo	A2) work area orderly and clean Waste is gathering in a wrong manner	test	Brad Michawitz	06-04-2024	Replanned
19-02-2024: SEC-2022 2-19 Workplace inspection construction Samuel Loscalzo	B6) correct use of PPE		Samuel Loscalzo	10-04-2024	Open



6. User rights

Modification of Roles (action) and permission per Role can be managed via the menu My users and My groups by the system administrator (see our support guide “user rights”).





7. Frequently Asked Questions

- 1 I don't see any nonconformities in my action tracker.
Your browser opens in the last view mode that you used. Press "Clear" and make your selection.
- 2 I only see old nonconformity reports that have status open.
Probably inspections have been done in the past of which the actions were not managed. You can select filters to select your recent actions. For instance, from inspection date, checklist name, responsible person, status.
- 3 What does the tick box "send action request by email: mean?
When you assign an action, you can notify the action taker by email.
- 4 What does the tick box "verification required" mean?
When you would like the effectiveness of the corrective action to be checked on implementation, you can assign a verifier.