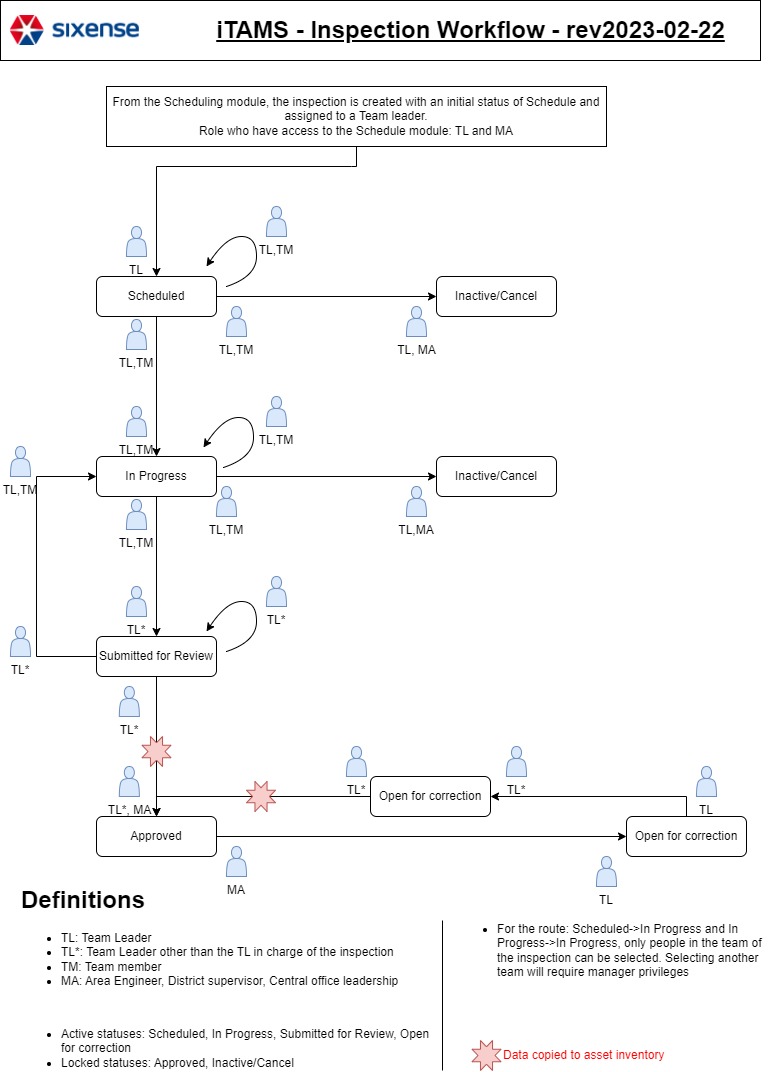
# How to Route an Inspection

|  |  |
| --- | --- |
| *acces* | This function is in: **Tasks->Inspections->Routings** |

## Description

This “HOW TO” manual describes the way to route an Inspection from one user to another.

Workflow:



## Steps

| # | Description |
| --- | --- |
| 1. | To route an inspection either choose a Asset from the list or use the ***Quick Search***, the ***Filter*** functions. |

|  |  |
| --- | --- |
| 2. | Click on the ***Inspections*** tab. |
| 3. | Select the inspection from the list. |

|  |  |
| --- | --- |
| 4. | Click on the ***Routings*** tab on the top navigation menu. |
| 5. | 1. Click on ***Actions*** tab to create a routing. 2. iTAMS creates the 1st routing when the inspection is scheduled. 3. You can move the inspection from schedule to In Progress. |

|  |  |
| --- | --- |
| 6. | Click on ***+ Add*** from drop-down menu., it will automaticall change the status from Scheduled to In Progress. You can add comments, and seach for a user you want to send it to and cc. |
| 7. | 1. The Status will automatically populate following the business rules. 2. ***Date sent****,* ***Asset*** and ***Task*** are automatically filled. 3. The “Include report in email” box allows the user to include the report in the routing email. Add ***Comments*** specific to the routing (if any). 4. You cannot update ***From user*** (this field is read-only and automatic). 5. Select ***To user*** the inspection will be routed to. The drop-down list values depend on the business rules. 6. Add ***CC Emails*** if you need to CC the routing to other users (s). 7. Click on the icon to ***Save.*** |

|  |  |
| --- | --- |
| 8. | Once completed the new routing will appear in the routing list. |
| 9. | Click on the In Progress Routing Record    You can also click the green cirlge icon with the 3 lines and the + sign to reoute an Inspection     1. The Status will automatically populate following the business rules. So you will see the status change from In Progress to Submitted for Review 2. ***Date sent****,* ***Asset*** and ***Task*** are automatically filled. 3. The “Include report in email” box allows the user to include the report in the routing email. Add ***Comments*** specific to the routing (if any). 4. You cannot update ***From user*** (this field is read-only and automatic). 5. Select ***To user*** the inspection will be routed to. The drop-down list values depend on the business rules. 6. Add ***CC Emails*** if you need to CC the routing to other users (s). 7. Click on the icon to ***Save.*** |
| 10. | Once routed to ***Approved*** status:   1. You can generate a report 2. The type of report generated is based of the type of inspection, for example when the Inspection Type = Routine, the Report Type = Routine is generated 3. The user can not generate the inspection report, but can download the last Inspection report file.     Click PDF icon.    **NOTE:** Because we are working in UAT not all Values, Documents, and Phots will populate in the Reports at this time. |
|  |  |