

# Basic Inspection

Inspection Management Software  
Administrator Manual

Version 2.1

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## Preface

SIVCO is presenting an Environmental Safety Suite component called Inspection. Inspection has been created to maintain laboratory and related facility inspection processes, collect and store resultant inspection data, and present this information in a format which is easy to use and understand.

Research and educational laboratories are inspected from time to time and many institutions (specifically universities) deal with a large number of laboratories. SIVCO's Inspection application assists with keeping inspection records organized and accessible for inspectors as well as lab personnel.

## General Overview

Inspection is a web based system where the software is installed on a central server and user access is done via internet or intranet. The end user workstations access the system via a web browser. This manual has been written with the assumption that the Inspection user has already implemented CHEMATIX™ on the system and therefore issues of resource management (creating labs, buildings and users etc.) will not be covered.

## 4 Inspection Follow Up

When an inspection has been submitted with deficiencies, these deficiencies appear on a specific report. The outstanding deficiencies can be dealt with one at a time and a record of how they were resolved is available. Additionally, any outstanding deficiencies for an inspection will appear at the top of the Inspection Section when performing a new inspection.

### 4.1 Recording Deficiency Resolution

The outstanding deficiency list is available for the PI and Lab Supervisor from the “Maintain My Inspection Follow-ups” link in the “Manage Locations” heading of Resource Management in CHEMATIX.

Review My Inspection Records					
UNIVERSITY OF CALGARY		UNIVERSITY OF CALGARY		UNIVERSITY OF CALGARY	
Inspection Followup Record List					
Inspection Date (MM/dd/yyyy)	Inspector	Laboratory	PI	Deficiency	Inspection type / revision
<input type="radio"/> 10/07/2011	<a href="#">Shook, Al</a>	Corrosion Research	<a href="#">Shook, Al</a>	Hoods are uncluttered	<a href="#">General Safety Self Inspection Rev. 2</a>
<input type="radio"/> 10/07/2011	<a href="#">Conklin, Gerald</a>	Waste Treatment Research	<a href="#">Shook, Al</a>	Door signs present/complete/upda...	<a href="#">Annual Chemical Lab Inspection Rev. 1</a>
<input type="radio"/> 10/07/2011	<a href="#">Conklin, Gerald</a>	Waste Treatment Research	<a href="#">Shook, Al</a>	Flammable liquids stored properly	<a href="#">Annual Chemical Lab Inspection Rev. 1</a>
<input type="radio"/> 10/07/2011	<a href="#">Conklin, Gerald</a>	Waste Treatment Research	<a href="#">Shook, Al</a>	Door signs present/complete/upda...	<a href="#">Annual Chemical Lab Inspection Rev. 1</a>
<input type="radio"/> 10/07/2011	<a href="#">Conklin, Gerald</a>	Waste Treatment Research	<a href="#">Shook, Al</a>	Belt guard on motors and pumps	<a href="#">Annual Chemical Lab Inspection Rev. 1</a>
<input type="radio"/> 10/07/2011	<a href="#">Conklin, Gerald</a>	Dr. Shook's Lab	<a href="#">Shook, Al</a>	Emergency phone numbers posted i...	<a href="#">Annual Chemical Lab Inspection Rev. 1</a>
<input type="radio"/> 10/07/2011	<a href="#">Conklin, Gerald</a>	Dr. Shook's Lab	<a href="#">Shook, Al</a>	Fire extinguishers present/inspe...	<a href="#">Annual Chemical Lab Inspection Rev. 1</a>
<input type="radio"/> 10/07/2011	<a href="#">Conklin, Gerald</a>	Dr. Shook's Lab	<a href="#">Shook, Al</a>	Explosion proof refrigerator for...	<a href="#">Annual Chemical Lab Inspection Rev. 1</a>

The information on which inspection and what date it was inspected is available. Also, the first 30 characters of the deficiency are displayed. The full text of the deficiency can be viewed by positioning the mouse over the deficiency.

To record the resolution of the deficiency, select the radio button beside the deficiency and click the “Open Details” button.



**Review My Inspection Records**



UNIVERSITY OF CALGARY      Followup Inspection Details

Laboratory:	<b>Corrosion Research</b>
Inspector:	<b><u>Shook, Al</u></b>
Inspection Date:	<b>10/07/2011</b>
Inspection Name and Revision:	<b><u>General Safety Self Inspection Rev. 2</u></b>
Inspection Section:	<b>Chemical Fume Hoods</b>
Inspection Item:	<b>Hoods are uncluttered</b>
Failed on:	<b>Unsatisfactory</b>
Inspector's comments:	<b>Too much stored in fume hood</b>

**Please select the solution:**

**Please describe the solution:**

Resolved and Completed

Forwarded

Cancel & Return

Select a solution provided from the drop-down list. These solutions are maintained by Inspection Administrators, so they can be maintained as needed.

More information can be entered in the text box to further describe the specifics of the solution. It is required to enter some more information here.

There are two possible ways to mark a deficiency as resolved:

- If the deficiency has been resolved, use the “Resolved and Completed” button.
- If the deficiency cannot be resolved by the usual means and it needs to be forwarded for consideration by others (i.e. due to budgetary or departmental constraints) it can be closed as being forwarded to others for consideration

Once a deficiency has been resolved, the resolution and status can be viewed by Department Inspection Readers (please view the section on the Department Reader role for more information).



## 4.2 Viewing Follow-up Records

A user with the Department Inspection Reader role can view the follow-up records for the department(s) where they have that role.

To view the follow up records go to the Resource Management module in CHEMATIX and click on the “**Review Inspection Records by Department**” link. Please note that this link will only

be visible to you if you have been assigned the Department Inspection Reader role for one or more departments.

## Review Inspection Records By Department

Custom Range From:   To:  

This Quarter  
 Last Quarter  
 This Half Year  
 Last Half Year  
 This Year  
 Last Year

Department List

Department Name	Department Number
<input type="radio"/> Biology	200
<input checked="" type="radio"/> Chemical Engineering	300

Select the time frame or enter a custom date range. Select the department to see the report for, then click the “**Display Inspection Followup Records**” button.

### Review Inspection Records By Department

✔ **Activity Status: Success**  
 7 Follow-up Records found

Custom Range From:  To:   
 This Quarter  
 Last Quarter  
 This Half Year  
 Last Half Year  
 This Year  
 Last Year

Department List

Department Name	Department Number
<input type="radio"/> Biology	200
<input checked="" type="radio"/> Chemical Engineering	300

Inspection Followup Record List

Inspection Date (MM/dd/yyyy)	Inspector	Laboratory	PI	Supervisor	Inspection	Deficiency	Status	Last Update	Closed Date
<input type="radio"/> 10/07/2011	<a href="#">Shook, Al</a>	Corrosion Research	<a href="#">Shook, Al</a>	<a href="#">Evans, Dawn</a>	<a href="#">General Safety Self Inspection Rev. 2</a>	Secondary containers properly la...	Resolved	10/07/2011	10/07/2011
<input type="radio"/> 10/07/2011	<a href="#">Conklin, Gerald</a>	Waste Treatment Research	<a href="#">Shook, Al</a>	<a href="#">Karolat, Jack</a>	<a href="#">Annual Chemical Lab Inspection Rev. 1</a>	Door signs present/complete/upda...	No Action	-	-
<input type="radio"/> 10/07/2011	<a href="#">Conklin, Gerald</a>	Waste Treatment Research	<a href="#">Shook, Al</a>	<a href="#">Karolat, Jack</a>	<a href="#">Annual Chemical Lab Inspection Rev. 1</a>	Belt guard on motors and pumps	No Action	-	-
<input type="radio"/> 10/07/2011	<a href="#">Shook, Al</a>	Corrosion Research	<a href="#">Shook, Al</a>	<a href="#">Evans, Dawn</a>	<a href="#">General Safety Self Inspection Rev. 2</a>	Hoods are uncluttered	No Action	-	-
<input type="radio"/> 10/07/2011	<a href="#">Shook, Al</a>	Corrosion Research	<a href="#">Shook, Al</a>	<a href="#">Evans, Dawn</a>	<a href="#">General Safety Self Inspection Rev. 2</a>	Designated eating/drinking area	Forwarded	10/07/2011	-
<input type="radio"/> 10/07/2011	<a href="#">Conklin, Gerald</a>	Waste Treatment Research	<a href="#">Shook, Al</a>	<a href="#">Karolat, Jack</a>	<a href="#">Annual Chemical Lab Inspection Rev. 1</a>	Door signs present/complete/upda...	No Action	-	-
<input type="radio"/> 10/07/2011	<a href="#">Conklin, Gerald</a>	Waste Treatment Research	<a href="#">Shook, Al</a>	<a href="#">Karolat, Jack</a>	<a href="#">Annual Chemical Lab Inspection Rev. 1</a>	Flammable liquids stored properly	No Action	-	-

The inspection follow-up records for the deficiencies in the selected time and department are displayed. The full inspection can be viewed by clicking on the inspection link for any deficiency. The deficiency and its current status is displayed. The dates when the outstanding deficiency was last updated or closed are also displayed.

To view the details of a resolution, select the radio button beside the item of interest and click the “Open Details” button.

Department List	
Department Name	Department Number
<input type="radio"/> Biology	200
<input checked="" type="radio"/> Chemical Engineering	300

Laboratory: **Corrosion Research**  
 Inspector: **Shook, Al**  
 Inspection Date: **10/07/2011**  
 Inspection Name and Revision: **General Safety Self Inspection Rev. 2**  
 Inspection Section: **Chemical Safety**  
 Inspection Item: **Secondary containers properly labeled**  
 Failed on: **Unsatisfactory**  
 Inspector's comments: **2 L container on bench not labeled**  
 Status: **Resolved**  
 Last Update: **10/07/2011**  
 Closed Date: **10/07/2011**  
 Followup Action: **Dealt with as described below**  
 Followup Comments: **Placed proper secondary contaier labelling on bottle**

The information on the whole deficiency as well as the follow-up action is displayed. The “Return to Followup Records” button will take you back to the previous list of followups.



## 6 End User Functionalities

### 6.1 Viewing My Laboratories

This functionality is available for all users. You are able to view all the laboratories assigned to you as PI and Supervisor. In addition, you are also able to manage the lab details and lab personnel details of all labs assigned to you.

From the main menu select the “View My Laboratories” link at the top left of the screen. You will be transferred to the Inspector’s Lab List page which displays all labs assigned to you as a PI and as a Supervisor.

Inspector's Lab List						
<b>My Lab as a PI:</b>						
Laboratory	Department	Type	PI	Supervisor	Last Inspected	Status
<a href="#">62B/113/Bulk Waste Colection</a>	Environmental Health and Safety/900	Waste Storage 90 days	<a href="#">Conklin, Gerald</a>	<a href="#">Conklin, Gerald</a>		Assigned
<a href="#">1234/001/Demo Storage</a>	Risk Management Services/01321	Waste Storage 30 days	<a href="#">Conklin, Gerald</a>	<a href="#">Conklin, Gerald</a>		Assigned
<a href="#">917/B16/Main Chemistry Lab</a>	Central Research Stores/CRS	Chemical Lab	<a href="#">Conklin, Gerald</a>	<a href="#">Thrasher, Fred</a>	7/18/07	Assigned
<b>My Lab as a Lab Supervisor:</b>						
Laboratory	Department	Type	PI	Supervisor	Last Inspected	Status
<a href="#">62B/186/Bulk Receiving</a>	Central Research Stores/CRS	Chemical Lab	<a href="#">Thrasher, Fred</a>	<a href="#">Conklin, Gerald</a>		Assigned
<a href="#">774/144/Lab 00</a>	Central Research Stores/CRS	Chemical Lab	<a href="#">Thrasher, Fred</a>	<a href="#">Conklin, Gerald</a>		Assigned
<a href="#">774/125/Test Center</a>	Central Research Stores/CRS	Chemical Lab	<a href="#">Thrasher, Fred</a>	<a href="#">Conklin, Gerald</a>		Assigned

The names of the PI and Supervisor for each lab are hyperlinked to their contact information. If you require it, click on the person’s name.

If there was a previous inspection report completed for the laboratory, it will appear in the Last Inspected column. To view the last inspection, click on the last inspected date and a PDF report of the last inspection will appear.

To manage the details of each lab, click on the name of the lab under the Laboratory column. You will be transferred to the Laboratory Details page of the lab you selected to manage. For example:

### Laboratory Details

**Department: 900**

Building: **628**      Building Name: **Physical Plant Building**      Room: **113**  
 Fire Zone:      Lab Room: **Yes**      Room POC:

Other Labs in this room:

Room	Lab Name	Barcode	Lab Status	Last Inspected	PI	Lab Supervisor	Department
No other labs in this room.							

Lab Name: **Bulk Waste Colection Assigned**      Lab Barcode: **GITL000014**  
 Lab Status:      Last Inventory Date:  
 Last Inspected:      Last Caution Sign Date:  
 Principal Investigator: **Gerald Conklin**      Lab Supervisor: **Gerald Conklin**

Lab Personnel

Lab PI	Lab Super	Lab User	Name	Home Dept	Phone
X	X		Conklin, Gerald	CRS	877-700-2600
		X	Training, Two	2200	(403) 555-1122

Engineering Hazard Control  
 Ventilation Type:      Access Door Type:  
 Floor Surfaces:      Bench Top Surfaces:  
 ReviewDate:      Comments:

Maintain Lab

View Past Inspections

Perform Self Inspection

Back

You are able to view all the details of the lab as well as maintain lab details, view past inspections, and perform a self inspection.

## 6.2 Maintain Laboratory & Personnel Details

To maintain lab and personnel details, click on the **“Maintain Lab”** button. You will be transferred to the Maintain Laboratory Details page. For example:

### Maintain Laboratory Details

Department: **900**

Building: **628**      Building Name: **Physical Plant Building**      Room: **113**

Fire Zone:      Lab Room: **Yes**      Room POC:

Other Labs in Room:

Room	Lab Name	Barcode	Lab Status	Last Inspect	PI	Lab Supervisor	Department
	<input type="text" value="Bulk Waste Collection"/>		<b>Assigned</b>				

Lab Name:       Lab Barcode: **GITL000014**

Lab Status: **Assigned**      Lab Type: **Waste Storage 90 days**

Last Inspection Date:      Last Caution Sign Date:

Last Inventory Date:

Principal Investigator: **Conklin, Gerald**      Lab Supervisor: **Conklin, Gerald**

If you need to change the name of the lab, enter the name of the lab in the textbox beside Lab Name and click **“Submit Lab Name”**.

If you want to manage lab personnel details such as updating roles and adding personnel, click **“Maintain Personnel”**. This will take you to the Maintain Laboratory Personnel page. For example:

### Maintain Laboratory Personnel

Laboratory Name: **Bulk Waste Collection**  
Room POC:

Department#: **900**      Department Name: **Environmental Health and Safety**

Building#: **628**      Building Name: **Physical Plant Building**      Room: **113**

Last Caution Sign Date:      Last Inspection Date:      Last Inventory Date:

Lab Status: **Assigned**      Lab Room: **Yes**      Chem Lab: **No**

Fire Zone:

Lab PI	Lab Super	Lab User	Name	Home Dept	Phone	HazWaste Expiry	RTK Expiry
<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	Conklin, Gerald	CRS	877-700-2600	4/27/10	

To update the personnel’s role, click on the radio button or checkbox on the appropriate role to be updated then click **“Update Role”**.

To add personnel, click **“Add Personnel”** and you will be transferred to the Person Search page where you will need to search for the person to add. Enter the person’s information in the search fields. To refine your search, select one of the radio buttons beside **“Begins With, Contains, or Exact”** and the search engine will search for the person based on your criteria. Click **“Search”** and the results will appear.

### Person Search

**Search for User**

Last Name:   Begins with  Contains  Exact  
 First Name:   Begins with  Contains  Exact  
 User ID:   Exact  
 e-mail:   Exact  
 Employee Id:   Exact  
 Home Department Name:   Begins with  Contains  Exact  
 Home Department #:   Exact

Name	User Id	Home Dept. #	Home Dept. Name	Phone
<input checked="" type="radio"/> Training, Four	training4	2200	Chematix Training 1	555-1122
<input type="radio"/> Training, Five	training5	2200	Chematix Training 1	555-1122
<input type="radio"/> Training, Six	training6	2200	Chematix Training 1	555-1122
<input type="radio"/> Training, Seven	training7	2200	Chematix Training 1	555-1122
<input type="radio"/> Training, Eight	training8	2200	Chematix Training 1	555-1122
<input type="radio"/> Training, Nine	training9	2200	Chematix Training 1	555-1122
<input type="radio"/> Training, Ten	training10	2300	Chematix Training 2	555-1122
<input checked="" type="radio"/> Training, Three	training3	2300	Chematix Training 2	555-1122
<input type="radio"/> Training, Eleven	training11	2300	Chematix Training 2	555-1122
<input type="radio"/> Training, Twelve	training12	2300	Chematix Training 2	555-1122
<input type="radio"/> Training, Thirteen	training13	2300	Chematix Training 2	555-1122

Select the user you wish to add by clicking on the radio button beside their name and click “Select User”.

### 6.3 Viewing Past Inspections

To view past inspections of a specific lab, click on the “View Past Inspections” button. You will be transferred to the Laboratory Inspection History page which displays the date of inspection, the inspection type/revision number, name of Inspector, and the status of the inspection.

### Laboratory Inspection History

Date	Inspection Type/Revision	Inspector	Status
8/21/06	Annual Chemical Lab Inspection Rev. 0	Conklin, Gerald	Passed
7/18/07	Self Inspection Checklist Rev. 0	Conklin, Gerald	Passed

To view the inspection report, click on the name of the inspection under the Inspection Type/Revision column and the PDF of the inspection report will appear.


## 6.4 Performing a Self Inspection

To perform a self inspection, click on the “**Perform Self Inspection**” button. You will be transferred to the Lab Self Inspection page. Follow the procedure for an inspection as outlined in [Section 2.5 Perform an Inspection](#).

## 6.5 Departmental Inspection Records for Departmental Readers


While the full inspection summary report can be filtered by department and building by an Inspector, Department Inspection Readers have been given read-only access to inspection records for one or more departments.

These inspection records can be viewed though the “**Review Inspection Records By Department**” link in the Resource Management module in CHEMATIX. This link will only show up for users with a valid Departmental Inspection Reader role.





UNIVERSITY OF CALGARY

### Review Inspection Records By Department



UNIVERSITY OF CALGARY

Custom Range From:   To:  

This Quarter  
 Last Quarter  
 This Half Year  
 Last Half Year  
 This Year  
 Last Year

#### Department List

Department Name	Department Number
<input type="radio"/> Biology	200
<input type="radio"/> Chemical Engineering	300

Display Inspections

Display Inspection Followup Records

Finished

Specify a time frame (from either the provided selections or a custom date range) and a department the click the “**Display Inspections**” button. This will display all the inspections in that department for the time period.

List of Inspections			
Inspection Date (MM/dd/yyyy)	Inspector	Inspection Attachments	Inspection Document
07/05/2011	<a href="#">Shook, Al</a>	-	<a href="#">View</a>
09/30/2011	<a href="#">Conklin, Gerald</a>	-	<a href="#">View</a>
10/07/2011	<a href="#">Shook, Al</a>	-	<a href="#">View</a>
10/07/2011	<a href="#">Conklin, Gerald</a>	-	<a href="#">View</a>

To view any of the inspections appearing in the List of Inspections, click the “**View**” link beside the inspection of interest. A new window will open with a view of all the inspected items from the selected inspection.

## 6.6 Reviewing Last Self Inspection Dates

The Department Inspection Reader has the ability to view the last self-inspection dates for any department they have the Department Inspection Reader role. This is done through the “**Review Last Laboratory Self Inspections By Department**” link available in the Resource Management module of CHEMATIX.

### Review Inspection Records By Department




**Inspections Since:**  

- Self Inspection Checklist Rev. 0 2007-04-19 -
- Waste area weekly checklist Rev. 0 2009-11-10 -

#### Department List

Department Name	Department Number
<input type="radio"/> Chemistry	100
<input type="radio"/> Biology	200
<input type="radio"/> Chemical Engineering	300




## Basic Inspection User Manual

The inspections that are available to users as self-inspections are listed at the top of the page. If you only want to see inspections done since a certain date, that can be entered. The department(s) where you have been assigned the Departmental Inspection Reader role are listed. This will allow the readers to keep track of when the last self-inspection was done for a lab, and therefore see if they are keeping up to date.

Select an inspection and department, along with a specific date if required and click the “Display Inspections” button. The page will be refreshed with a list of inspections matching the search criteria.

**Review Inspection Records By Department** User Name: **shook**

Inspections Since:  

Self Inspection Checklist Rev. 0 2007-04-19 -  
 Waste area weekly checklist Rev. 0 2009-11-10 -

Department List

Department Name	Department Number
<input type="radio"/> Chemistry	100
<input type="radio"/> Biology	200
<input checked="" type="radio"/> Chemical Engineering	300

Last Inspection	Laboratory	PI	Supervisor	Building	Room
04/19/2007	Stress Testing Lab	<a href="#">Karolat, Jack</a>	<a href="#">Karolat, Jack</a>	Hanna Biocenter	240
09/13/2011	Corrosion Research	<a href="#">Shook, Al</a>	<a href="#">Evans, Dawn</a>	Siemens Engineering Commons	127
10/14/2011	Waste Treatment Research	<a href="#">Shook, Al</a>	<a href="#">Karolat, Jack</a>	Hanna Biocenter	360
10/14/2011	Chem Eng 127	<a href="#">Stark, Michelle</a>	<a href="#">Stark, Michelle</a>	Siemens Engineering Commons	127

This resulting list shows the inspections for the specified time and department.