The Monitor Module checklist (V.1.0)

Step	Navigation	Comments
1. Set up an account (select areas and tick the monitor module)	System>Users	• This should be an admin or a manager account, not UM account • An email used in account details will be used to send all signed off inspections in the relevant area • Check that areas are ticked • Check that Monitor is ticked in Modules Tab
2. Create or copy the questionnaire	Monitor>Design	You can copy an existing questionnaire by going to **Monitor > Design > Open a questionnaire>Click on it in the left explorer pane> select Copy** To create a new questionnaire, go to **Monitor>Design>click Questionnaires category>Add a package** or use an import template (import questions) in **Monitor>Admin>Import** You can find more information here
3. Assign questionnaires to site types	Monitor>Admin> Questionnaire	Newly created questionnaires should be assigned to site types first before adding them to the package
4. Create a package and assign the package to users	Monitor>Packages>Click 'Packages'>Add package	Details on how to create a package can be found here. If you add an email to the package, the copy of the completed inspections will be sent to it despite the area. To edit or copy an existing package, click on it and select 'Edit'. If you tick a user in a package and this information doesn't save, check that areas are assigned correctly and it's either an admin or a manager user account. If there is an officer assigned to the Site in Site settings, tick this person in the user list for the package as well.

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5. Assign the package to sites	Monitor>Packages>Select the Package>select sites using tick boxes>click Save	Information about assigned sites will be visible in 'In Package' column
6. Log in to the tablet with the account	Tablet>Monitor	Make sure to log in with the correct user account. If the inspection package isn't visible or no sites are available, check the account and package settings and then synchronise the tablet.
7. Mark the inspection on the tablet	Tablet>Monitor	After the inspection is complete, there are two options when you click three dots in the top right corner: sign off and email. The email option allows you to send inspection results to the preferred email. Emails will be sent after the inspection is signed off and the tablet is synchronised.
8. Make any necessary changes from the desktop	Monitor>Monitor	All inspections, both completed and open, will be visible in the Monitor tab. They can be downloaded in two formats: in Excel file (Export button) and Word file (Report button)
9. Analyse information about the inspection and create reports	Monitor>Analysis	You will find the description of all available reports here