



Ad-Hoc Inspection User Manual

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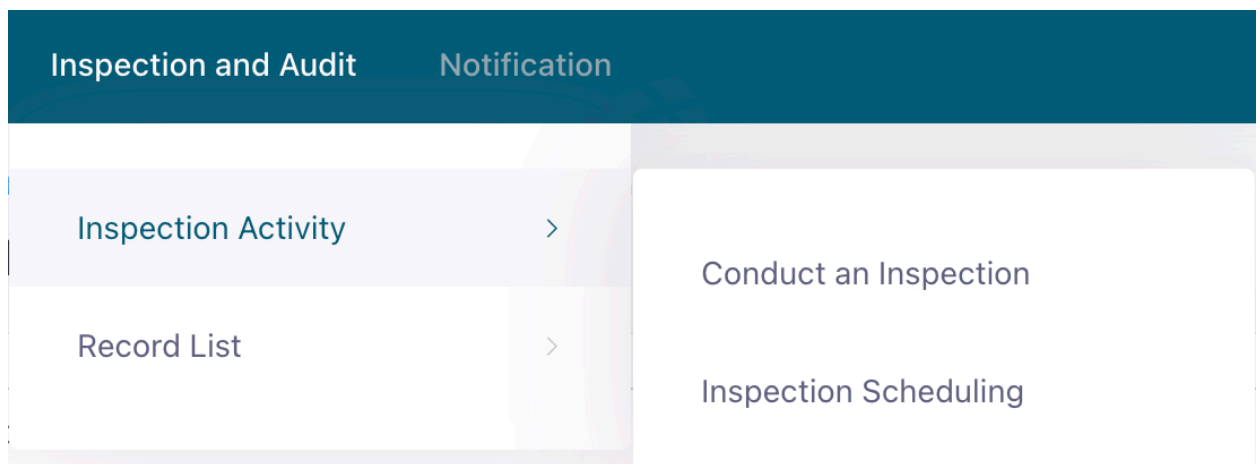
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1.WEB APPLICATION

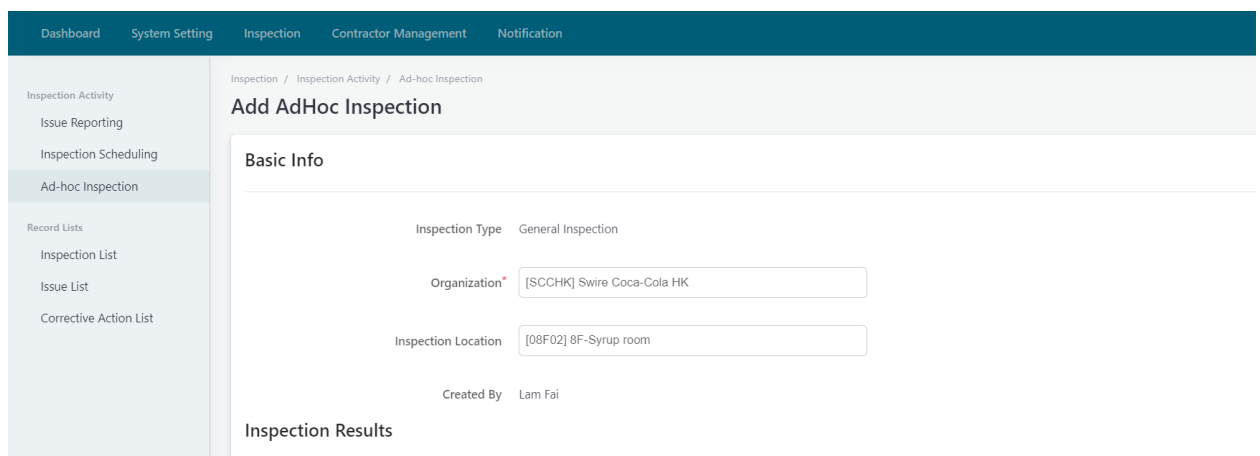
1. 1. SUBMIT AD-HOC INSPECTION

1. 1. 1. Inspection Entry

Navigate to Inspection > Inspection Activity > Conduct an Inspection and click to access the inspection page.



Select "Organization". Choose "Organization". If an "Inspection Location" is selected from the drop-down list, the default reviewer will be the "Space Manager" assigned to that particular "Inspection Location". Note that Space Manager is configured in the "System Setting >> Advanced Settings >> Space Point Management" menu.



In cases where no specific "Inspection Location" is selected, the default reviewer will be the staff assigned the responsibility of "Inspection - Preliminary Reviewer". Note that

Preliminary Reviewer is set up under “System Setting >> Basic Settings >> Organization Structure” menu.

Dashboard System Setting Inspection Contractor Management Notification

Inspection Activity / Inspection Activity / Ad-hoc Inspection

Add AdHoc Inspection

Basic Info

Inspection Type General Inspection

Organization* [SCCHK] Swire Coca-Cola HK

Inspection Location Enter to search

Created By Lam Fai

Inspection Results

1. 1. 2. Add Inspection Form

Select the desired form from the "Select Forms" drop-down, and upon selection, all the corresponding question items will be displayed at the bottom of the page. (Multiple forms can be selected if needed.)

Organization* [Tempe Plant] Tempe Plant

Created By James Berry

Inspection Results

Select Forms Enter to search

SMS 015.2 - Swire Facility Safety Inspection [SMS 015.2 - Swire Facility Safety Inspection] SMS 015.2 - Swire Faci...

[SMS 011.1 - Compressed Gases Cylinders Self Inspection Checklist_1...

Target Name* [SMS 010.2 - Lockout Tagout Hands-On Evaluation_1_1_23] SMS 010...

[SMS 009.2 - Hot Work Risk Assessment_1_1_23] SMS 009.2 - Hot W...

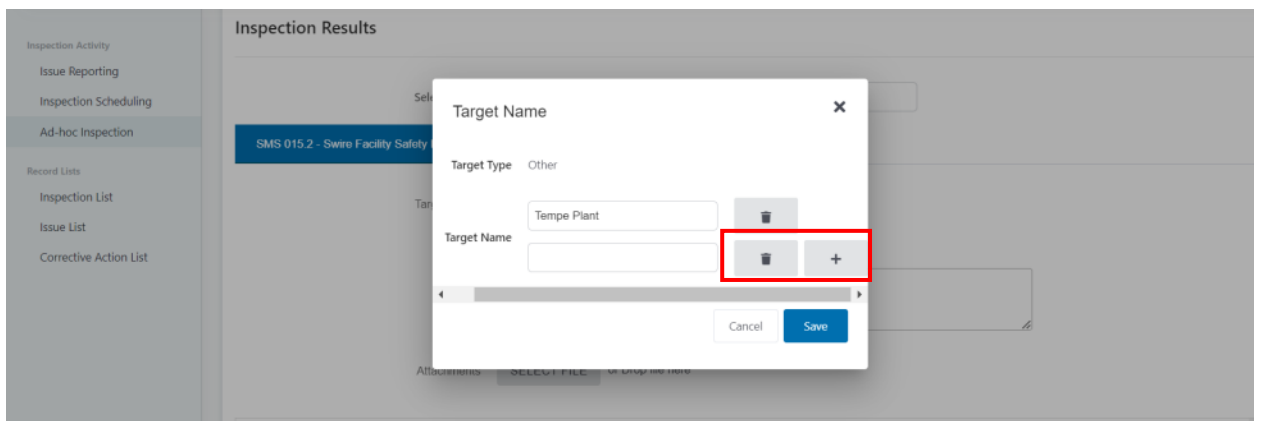
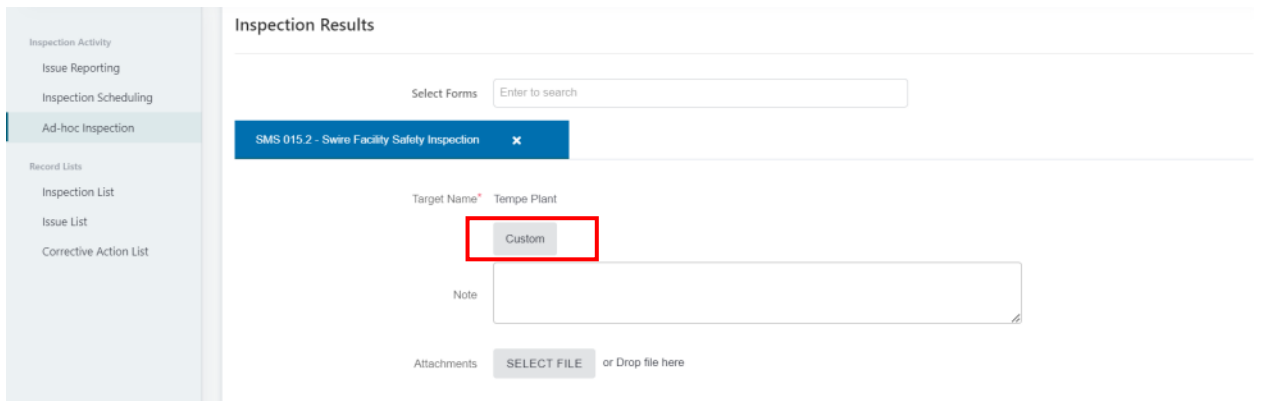
[Ladder Inspection Checklist - #FM-17364] Ladder Inspection Checklist ...

Note [Safety Committee Self Inspection Report Form] Safety Committee Self...

Attachments SELECT FILE or Drop file here

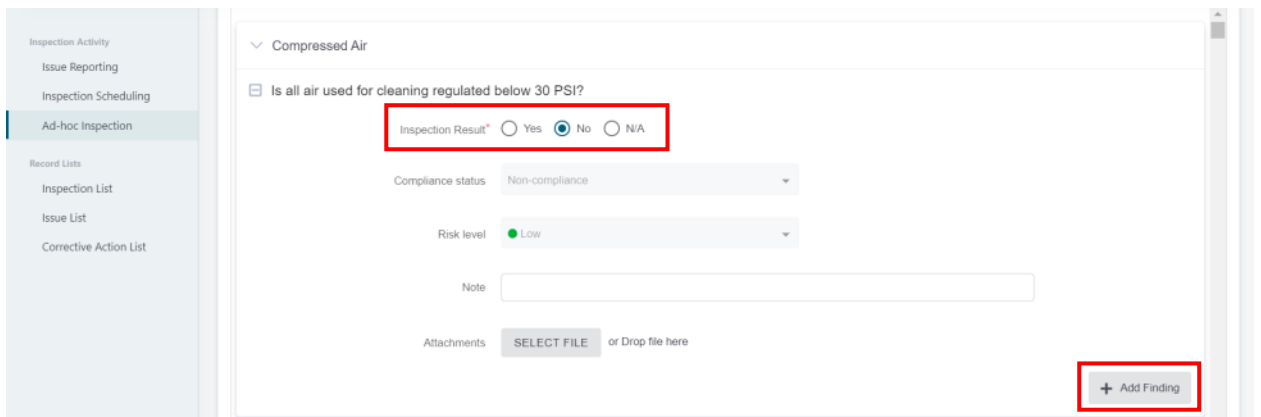
1. 1. 3. Target Name

The "Target Name" is automatically filled with the organization's information (or Inspection location if provided) but can be adjusted or personalized to generate new inspection targets, and this can be done for multiple entries.



1. 1. 4. Add Finding(s) to the Form

Choose the "Inspection Result", and you have the option to include a "Note" and attach files. In the case of a non-compliant inspection result, it is mandatory to "Add Finding."



To initiate the addition of a finding, click "+Add Finding" to access the finding creation page. By default, the "Target Name" is set to the organization name (or Inspection location if provided) and can be adjusted as needed. Fill in the "Deviation Description," opt to select a "Deviation Category" if desired, upload any necessary attachments, and click "Save" to successfully add the finding. It's possible to add multiple findings as needed.

The screenshot shows the 'Add Finding' form with the following fields and values:

- Target Name***: Tempe Plant
- Deviation Description***: (Empty text area)
- Risk Level**: LOW
- Deviation Category**: Choose an option
- Attachment**: SELECT FILE or Drop file here (Maximum file size: 20 MB)

At the bottom of the form, there is a section for 'Add Corrective Action' and buttons for 'Cancel', 'Save', and 'Finding'.

1. 1. 5. Add Corrective Action(s) to the Form

Including a corrective action is optional, and it is possible to add multiple corrective actions to a single finding.

This screenshot is identical to the one above, but with a red rectangular box highlighting the '+Add Corrective Action' button located in the 'Add Corrective Action' section at the bottom of the form.

To add corrective action, click the "+Add Corrective Action" button. The Correction Type is initially set to "Assign task." The "Responsible Organization" is automatically populated from the Basic Info section. Choose the "Responsible Person" (the individual responsible for implementing the corrective action), complete the necessary fields, and then click "Save."

Dashboard | Add Finding | Add Corrective Action

Corrective Action #1

Suggested Action*

Correction Type* Assign task Immediate correction

Due Date*

Root Cause* Choose an option

Description*

Cancel Save

If you modify the "Correction Type" to "Immediate Correction," it is mandatory to provide information for "Implementation Results" and "Actual End Date." No corrective action task will be generated upon submitting the inspection in this case.

Dashboard | Add Finding

Suggested Action*

Correction Type* Assign task Immediate correction

Root Cause* Choose an option

Description*

Implementation Results*

Actual End Date*

Cancel Save Submit

Beneath the inspection question item, you'll find the added findings and corrective actions. Click the "✎" icon to access the details page for modifying the finding and corrective action, and to delete the corrective action. Click the "🗑" icon to delete the finding.

Target Name	Deviation Description	Risk Level	Attachment	
Tepe Plant	air used for cleaning regulated is 35 PSI	Low		

Suggested Action	Due Date	Responsible Organization	Responsible Person
Adjust Regulator Settings	2023-12-01	[Tepe Plant] Tepe Plant	James Berry

1. 1. 6. Add Additional Findings and Corrective Action

If additional issues/findings out of the inspection checklist are identified, you can directly include new finding(s) and corresponding corrective action(s) in the "Findings and Corrective Actions" section. Click "+Add Finding" to access the relevant page. The inclusion of a corrective action is optional. If necessary, use the "+Add Corrective Action" button to add a corrective action.

Are load capacity ratings listing on mezzanines?
 Do all walking platforms have railings and toe boards?
 Are all catwalks and mezzanines in good condition?
 Are all elevated working platforms even and secure?

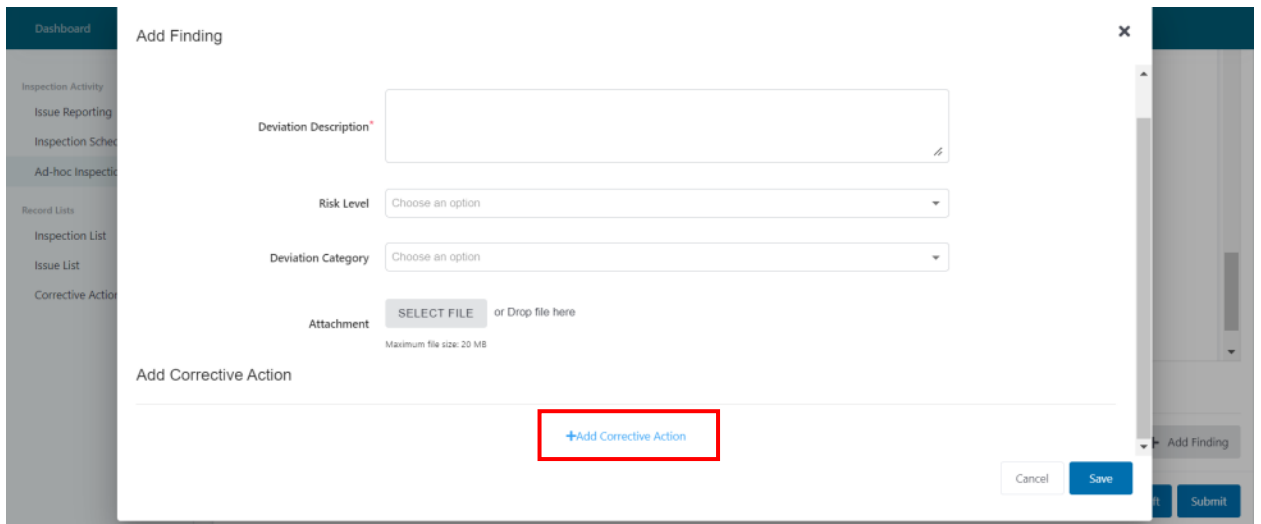
Inspection Result* Yes No N/A

Compliance status: Compliance

Note: _____

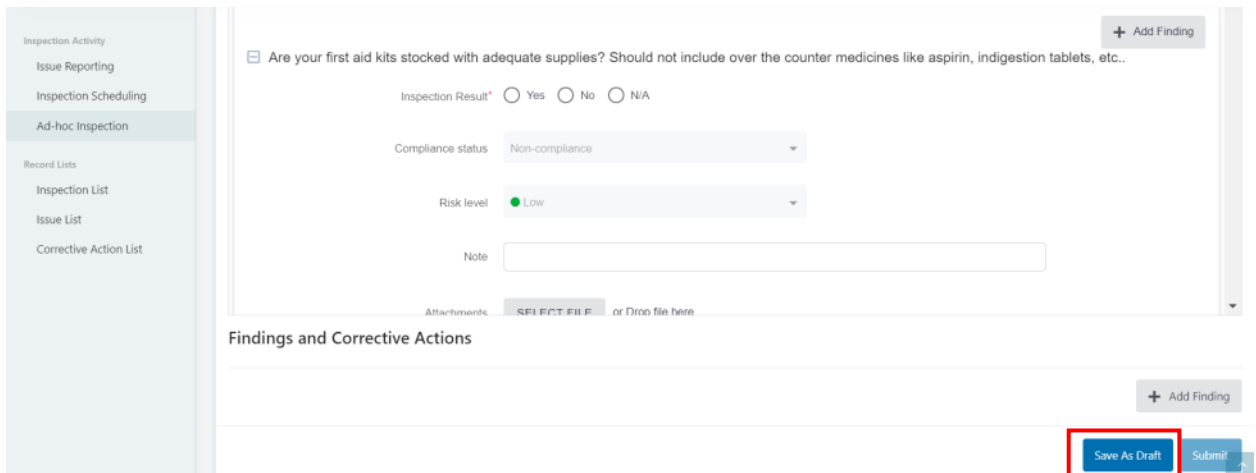
Attachments: or Drop file here

Findings and Corrective Actions



1. 1. 7. Save as Draft

If you're halfway through an inspection and want to continue it next time, click “Save as Draft” to change the status to “**Draft**”. Click the record again to resume the inspection or delete the record.



Task ID	Inspection Type	Organization	Cut-off Date	Submittal Date	Responsible Person	Status
AS2023-0035	General Inspection	[Tempe Plant] Tempe Plant	2023-11-28	2023-11-28	James Berry	Draft
AS2023-0034	General Inspection	[Tempe Plant] Tempe Plant	2023-11-28	2023-11-28	James Berry	Review
PS2023-0009	General Inspection	[Tempe Plant] Tempe Plant	2023-10-23	2023-10-23	James Berry	In Progress
PS2023-0008	General Inspection	[Tempe Plant] Tempe Plant	2023-10-23	2023-10-23	James Berry	Under Improvement
PS2023-0006	General Inspection	[Tempe Plant] Tempe Plant	2023-10-30	2023-10-23	James Berry	Under Improvement
AS2023-0010	General Inspection	[Tempe Plant] Tempe Plant	2023-10-23	2023-10-23	James Berry	Case Closed

1. 1. 8. Submit Ad-hoc Inspection

Each item in the inspection form requires a selection of inspection results. For each non-compliant item, it's necessary to “Add Finding,” and the addition of corrective action with “Add Corrective Action” is optional for each finding. Once all question items are addressed, click “Submit” at the bottom of the page.

Are load capacity ratings listing on mezzanines?
 Do all walking platforms have railings and toe boards?
 Are all catwalks and mezzanines in good condition?
 Are all elevated working platforms even and secure?

Inspection Result* Yes No N/A

Compliance status: Compliance

Note:

Attachments: or Drop file here

Findings and Corrective Actions

1. 2. REVIEW AD-HOC INSPECTION

Upon submission of the inspection, the status will change to "Review", and the individual assigned the responsibility of "Inspection - Preliminary Reviewer" or Space Manager of the specific location, will undertake the review task.

If only one staff member holds this responsibility, the task will be included in their “Personal Task Center”. The staff member should access the task with “Review” status in their to-do list, proceed to the details page, and fulfill the assigned task.

Personal Task Center

To-do

Task type Task ID Task Name Status Due Date (From) Due Date (To) Reset Search

Expand Advance Search

Task type	Task ID	Task Name	Status	Created	Due Date	Assignee	Responsible Person	Creator	Organization	Last Modified
Ad-hoc Inspection	AS2023-0036	Ad-hoc Inspection	Review	2023-11-28	2023-11-28	Matthew Riese	James Berry	James Berry	[Tempe Plant] Tempe Plant	2023-11-28
Reported Issue	IS2023-0005	Reported Issue	Review	2023-10-23	2023-11-22	Matthew Riese	James Berry	James Berry	[Tempe Plant] Tempe Plant	2023-10-23

If there are several staff members sharing the same responsibility, they are required to navigate to the “Unclaimed Tasks” list to claim the task.

Unclaimed Tasks

Tasks to be claimed

Task type Task Name Due Date (From) Due Date (To) Reset Search

Expand Advance Search

Task type	Task Name	Created	Due Date	Creator
Ad-hoc Inspection	Ad-hoc Inspection	2023-11-28	2023-11-28	James Berry
Ad-hoc Inspection	Ad-hoc Inspection	2023-11-28	2023-11-28	James Berry

Click on the task to enter the task detail page and click on the “Claim” button to claim the task.

Dashboard System Setting Inspection Contractor Management Notification

Inspection / Record Lists / Inspection List / Task Detail

Review AS2023-0036 - Ad-hoc Inspection Claim

Detail Info

Inspection Type General Inspection Created By [620753] James Berry

Organization [Tempe Plant] Tempe Plant

Task Content Claim Results

Form Name Target Type Target Name

Detail Info

Task Type Ad-hoc Inspection

Status Review View Workflow

People

Assignee

Responsible Person [620753] James Berry

Creator [620753] James Berry

Select "Claim Results" to update the inspection result, findings, and corrective actions. Upon submitting, if there are no findings or corrective actions, the task status will transition to " **Case closed** ". If there are findings and corrective actions, submitting will change the task status to " **Under Improvement** ", and the assigned "Responsible Person" for corrective actions will receive the task. Once all corrective actions are verified and passed, the status will shift from " **Under Improvement** " to " **Case closed** ".

1. 3. IMPLEMENT CORRECTIVE ACTIONS

Select the corrective action task marked with " **In Progress** " status in the "Personal Task Center" to access the detail page.

Dashboard System Setting Inspection Contractor Management Notification

Personal Task Center

To-do

Task type Task ID Task Name Status Due Date (From) Due Date (To) Reset Search

Expand Advance Search

Task type	Task ID	Task Name	Status	Created	Due Date	Assignee	Responsible Person	Creator	Organization	Last Modified
Inspection Corrective Action	CA2023-0039	Adjust Regulator Settings	In Progress	2023-11-28	2023-12-01	James Berry	James Berry	James Berry	[Tempe Plant] Tempe Plant	2023-11-28
Scheduled Inspection	PS2023-0009	testbug	In Progress	2023-10-23	2023-10-23	James Berry	James Berry	James Berry	[Tempe Plant] Tempe Plant	2023-10-23

Click the "Conduct Corrective Action" button to access the task content page. Input the "Implementation Results", select "Actual Completion Date", and upload any necessary attachment.

Dashboard

Task Content

Description* Adjust Regulator Settings: Verify that the pressure regulator is properly set. Adjust the regulator settings to reduce the air pressure to the acceptable level (below 30 psi).

Root Cause* Equipment failure

Implementation Results*

Actual End Date*

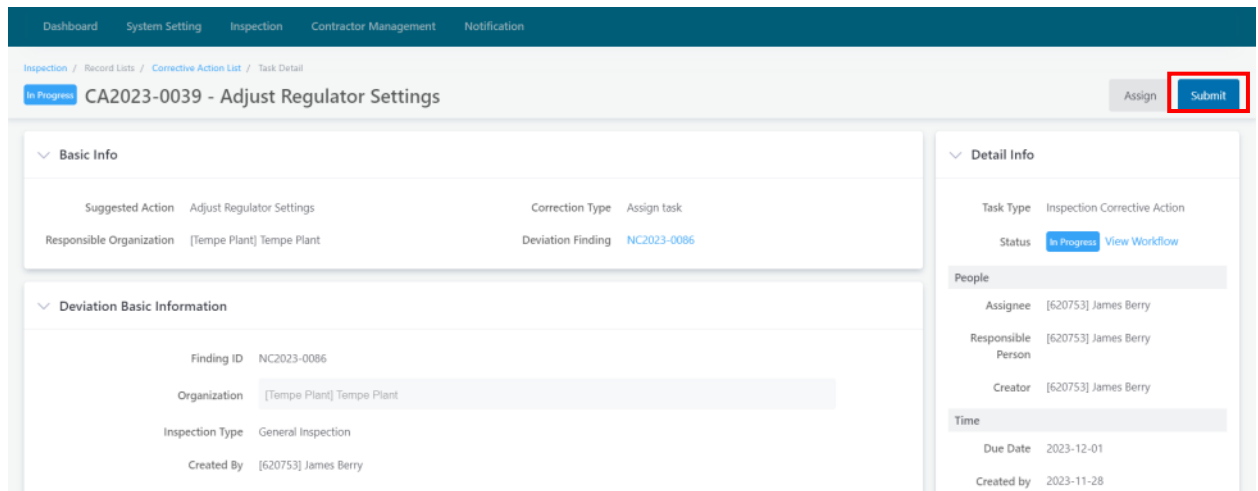
Attachment SELECT FILE or Drop file here
Maximum file size: 20 MB

Cancel Save

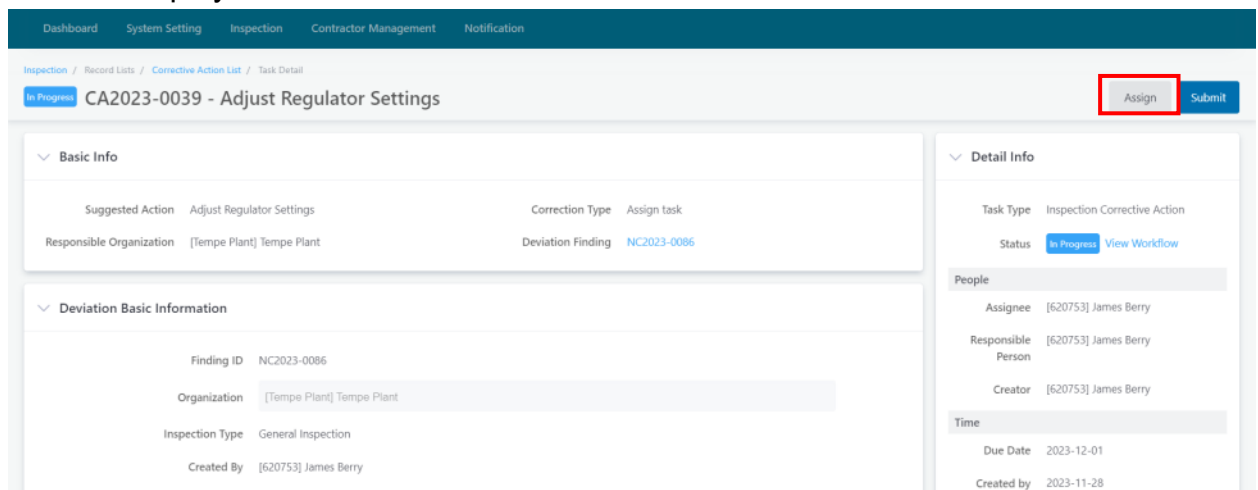
Task Content

Conduct Corrective Action

Click "Submit". After submission, the status of the corrective action will update to "Verifying".



If a task cannot be fulfilled, you have the option to click "Assign" to transfer the task to another employee.



1. 4. VERIFY CORRECTIVE ACTIONS

1. 4. 1. Verification Passed

The person who verifies corrective actions is the one who initiated the corrective action. If the corrective action was initiated during inspection, the verifier is the inspector; if it was initiated during the review, the verifier is the reviewer.

The verifier clicks the corrective task with "Verifying" status in the "Personal Task Center" to access the task detail page.

Dashboard System Setting Inspection Contractor Management Notification

Personal Task Center

To-do

Task type Task ID Task Name Status Due Date (From) Due Date (To) Reset Search

Expand Advance Search

Task type	Task ID	Task Name	Status	Created	Due Date	Assignee	Responsible Person	Creator	Organization	Last Modified
Inspection Corrective Action	CA2023-0039	Adjust Regulator Settings	Verifying	2023-11-28	2023-12-01	James Berry	James Berry	James Berry	[Tempe Plant] Tempe Plant	2023-11-28
Scheduled Inspection	PS2023-0009	testbug	In Progress	2023-10-23	2023-10-23	James Berry	James Berry	James Berry	[Tempe Plant] Tempe Plant	2023-10-23

Click on the task to open task detail page, and then click "Edit" to open the verification info page.

Dashboard System Setting Inspection Contractor Management Notification

Verifying CA2023-0039 - Adjust Regulator Settings Submit

Implementation Results adjust the regulator setting to reduce the pressure to 30 psi

Actual End Date 2023-11-28

Attachment

Verification Info Edit

Verification Date

Verified By James Berry

Corrective Action Completed

Verification Result

If the verification passes, select Yes, provide comments, and click the "Save" button.

Dashboard System Setting Inspection Contractor Management Notification

Verifying CA2023-0039 - Adjust Regulator Settings Submit

Implementation Results adjust the regulator setting to reduce the pressure to 30 psi

Actual End Date 2023-11-28

Attachment

Verification Info

Verification Date 2023-11-28

Verified By James Berry

Corrective Action Completed Yes No

Verification Result*

Cancel Save

Click "Submit". The status of the corrective action task updates from "Verifying" to "Case closed".

Dashboard System Setting Inspection Contractor Management Notification

Inspection / Record Lists / Corrective Action List / Task Detail

Verifying CA2023-0039 - Adjust Regulator Settings Submit

Basic Info

Suggested Action	Adjust Regulator Settings	Correction Type	Assign task
Responsible Organization	[Tempe Plant] Tempe Plant	Deviation Finding	NC2023-0086

Deviation Basic Information

Finding ID	NC2023-0086
Organization	[Tempe Plant] Tempe Plant
Inspection Type	General Inspection
Created By	[620753] James Berry
Submission Date	2023-11-28

Detail Info

Task Type	Inspection Corrective Action
Status	Verifying View Workflow

People

Assignee	[620753] James Berry
Responsible Person	[620753] James Berry
Creator	[620753] James Berry

Time

Due Date	2023-12-01
Created by	2023-11-28

1. 4. 2. Verification Failed

In case of verification failure, choose No, set "Next Step" to "postpone", enter the "Unfinished Reason", and click "Save".

Dashboard System Setting Inspection

Verifying CA2023-0039 - Adjust Regu

Implementation Results adjust the regulator setti
pressure to 30 psi

Actual End Date 2023-11-28

Attachment

Verification Info

Verification Date 2023-11-28

Verified By James Berry

Corrective Action* Yes No

Completed

Verification Result

Next Step* reject postpone

Unfinished Reason*

Cancel Save

Click "Submit" to complete the submission successfully. The status of the corrective action task will transition from "Verifying" to "In Progress", and the task will be visible on the responsible person's task list.

Verifying CA2023-0039 - Adjust Regulator Settings

Submit

Basic Info

Suggested Action	Adjust Regulator Settings	Correction Type	Assign task
Responsible Organization	[Tempe Plant] Tempe Plant	Deviation Finding	NC2023-0086

Deviation Basic Information

Finding ID	NC2023-0086
Organization	[Tempe Plant] Tempe Plant
Inspection Type	General Inspection
Created By	[620753] James Berry
Submission Date	2023-11-28

Detail Info

Task Type	Inspection Corrective Action
Status	Verifying View Workflow
People	
Assignee	[620753] James Berry
Responsible Person	[620753] James Berry
Creator	[620753] James Berry
Time	
Due Date	2023-12-01
Created by	2023-11-28