Guide for Relevant Authorities

Manage staff member inspection allocations

Version 1.0
22 March 2021

This Guide includes **Software Version 2.28.0** features and functionality.

Government of South Australia
Attorney-General's Department

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Background

Councils must undertake inspections in accordance with approved inspection related Practice Directions under the Act. After receiving notifications in relation to building work, and if it is indicated that an inspection will take place, councils may wish to allocate these inspections between staff members to ensure that requirements are met.

There are three options available for managers, inspectors and administration officers to view and manage staff member inspection allocations.

1. Allocate a staff member to perform an inspection from within the inspection record located in the **Inspections** dashboard.
2. View staff member allocations using the 'Search' feature within the **Inspections** dashboard.
3. Allocate or re-allocate inspection allocations from within the 'Inspection Allocated Applications report' located in the **Reporting** tool.
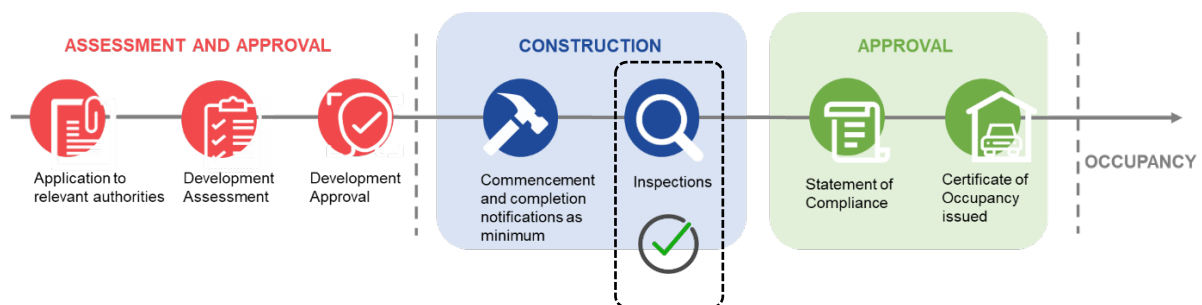
Allocate a staff member to perform an inspection

To manage the inspections allocations, run the 'Allocated Inspections Report' available from the Reports feature in the Assessments dashboard. Refer to the **Guide - Application and Operational Reporting** for more information.

1. Click on the **Inspection ID** to view the details.

View the team's workload

2. Click on **View team workload** to show current workload for all staff prior to allocating the inspection.

3. Move the cursor over the graph bar to view the number of inspection allocations.

4. Click on the graph bar to view the assigned inspections.
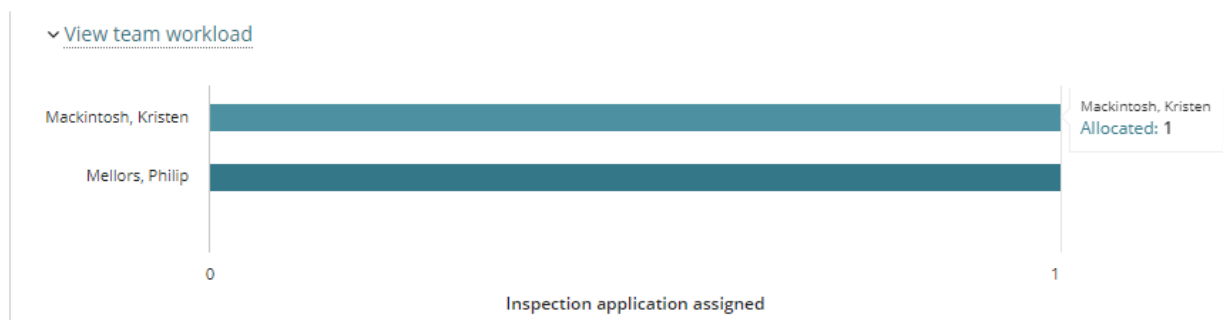
5. The staff member's assigned inspections are listed.

6. Click on **< Back to all users** to view the team workload.

7. Repeat the steps to view a different team member's allocated inspections.
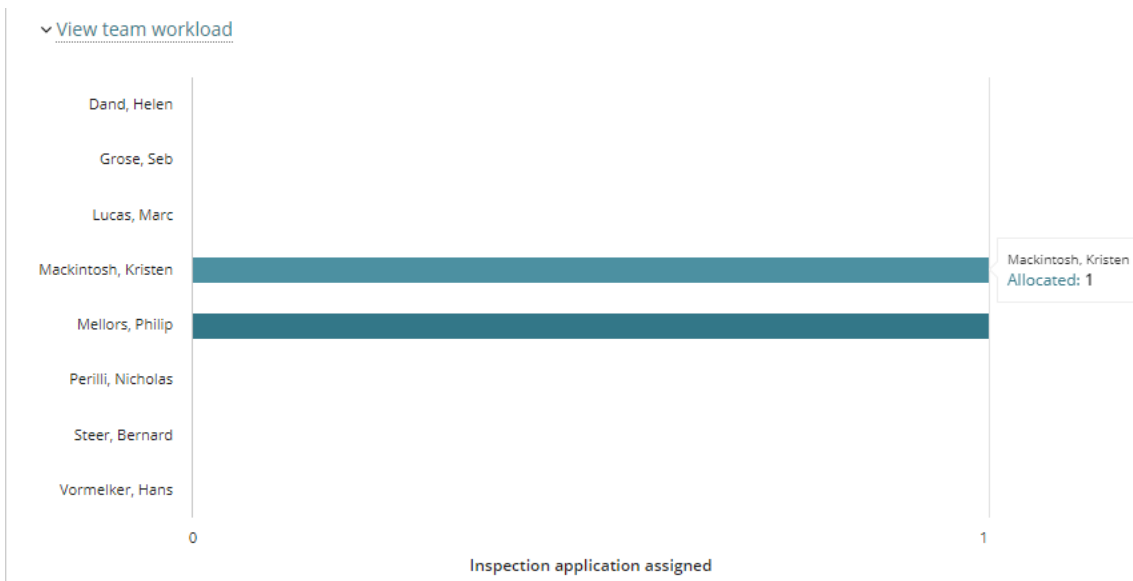
Allocate an inspection to a staff member

8. Type in the firs letters of the 'staff member's name' in the **Who** field and then select their name from the list of matches.

> **Important!**
>
> When a staff member has not been allocated the 'Inspection' role within their user account, their name will not show when searched in the **Who** and **Inspected By** fields.
>
> Contact your 'organisation administrator' who can add/allocate the 'inspection' role to the staff member's user profile.

9. The selected staff member is allocated and the **Inspected By** field automatically updates with the staff members name.

    To change the allocation click on '**x**' to delete and enter another staff members name within the **Who** field.

10. Click on **Go Back** to return to the Inspections dashboard.

On returning to the **Inspections** dashboard, the **Who** field in the inspection records will show the profile of the allocated staff member.

11. Move the cursor over the image to view the name of the staff member.

	Building Work Classification	Notification	Location	Initiated Date	Status	Inspection Category	Who
	4		22 ADA ST ADELAIDE SA 5000	03-Feb-2021	Inspection Pending	Adhoc Inspection	Helen Dand
		Completion of building	1 KING WILLIAM ST	02-Feb-	Inspection	Re-	

View list of allocated inspections by inspector

To view a list of both 'pending' and 'completed' allocated inspections, use the **Search Inspections** filters.

1. Click on **Search Inspections** to expand and view the search fields.

2. Type the first 4 characters of your 'last name' into the **Who** field and the **Enter** key to perform the search.

    A list of allocated inspections, allocated for the inspector, will show.

Re-allocate an inspection

3. Click on **Inspection ID** to view more details.

4. Click on '**X**' within the **Who** field to delete the allocation.

    Noting, when deleting the allocation this action will also remove the 'inspector's name' from the **Inspected By** field.

5. Type the first letters of the inspector's first name and select from list of matches.

The inspector's name will show in both the **Who** and **Inspected By** fields.

6. Click on **Go Back** to return to the Inspections screen.

On returning to the Inspections screen, the modified inspection now shows the name of the allocated inspector.
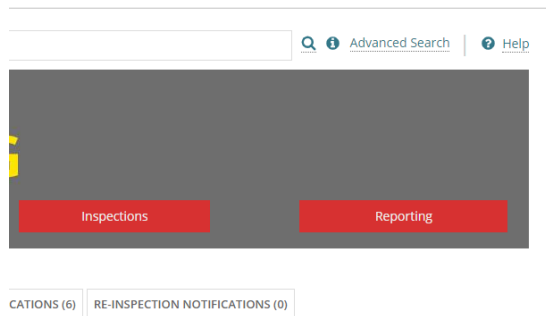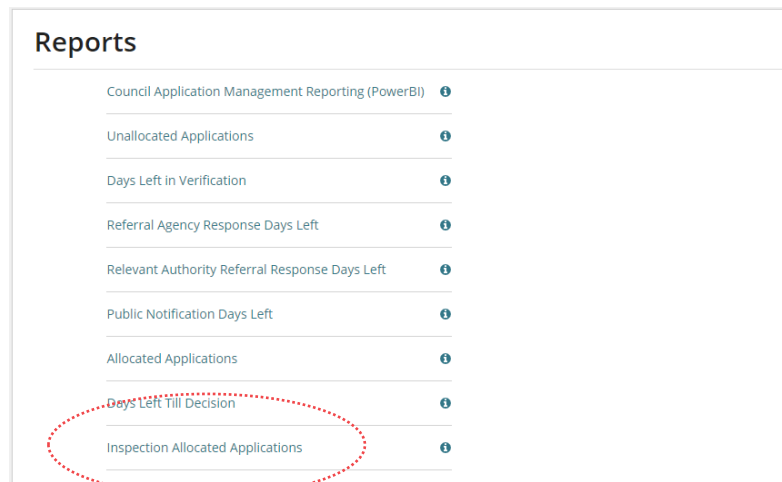
Run the Inspection Allocated Applications report

The Inspection Allocated Applications report shows the allocations in an infographic and includes the ability to view a staff member's allocated inspections, and from within the listing re-allocate an inspection to another staff member (as required).
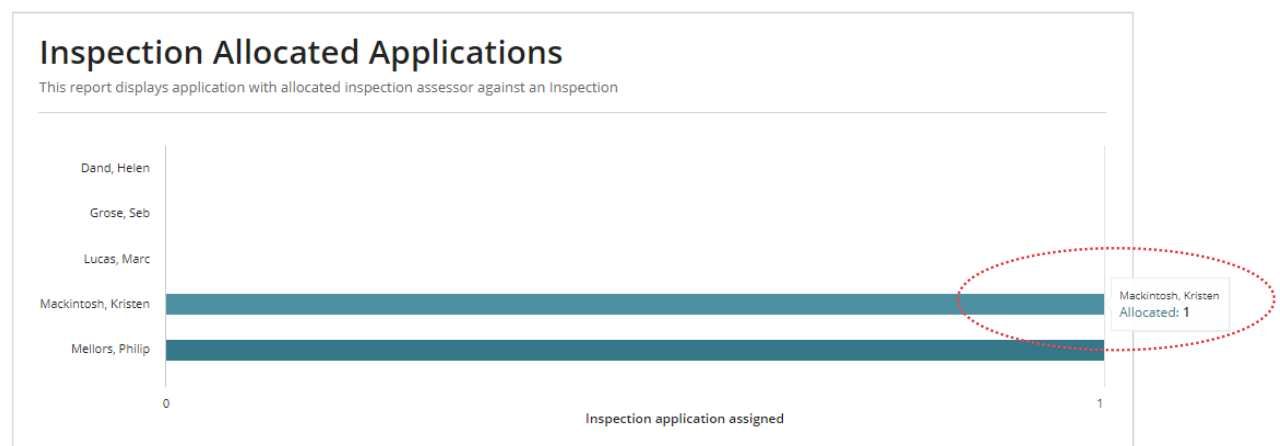
1. Click on **Reporting** within the Assessments dashboard.

2. Click on **Inspection Allocated Applications** report.

3. Within the **Inspection Allocated Applications** graph click on the 'bar' associated with the staff member to view the allocated inspections.

4. Click on the **Inspection ID** to view more details and re-assign the inspection to another staff member, refer to the **Re-allocate an inspection** instructions for assistance.

Alternately, click on **< Back to all users**.

On returning to the infographic repeat the steps to view another staff member's inspection allocations and/or re-assign an inspection (as required).
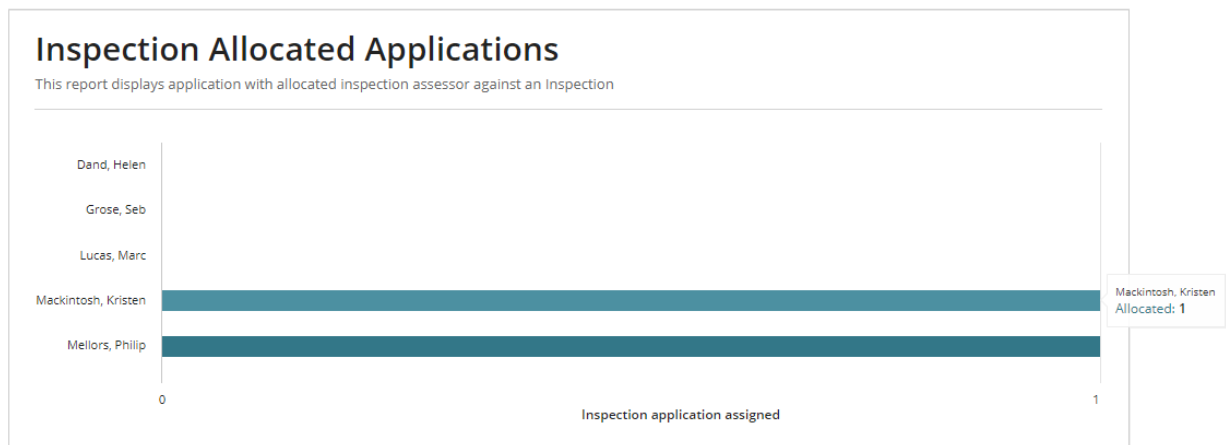
To exit the 'Inspection Allocated Applications report' click on **Assessments** from the menu, or click on the ← **back arrow** in the browser to go back to the **Reports** screen.
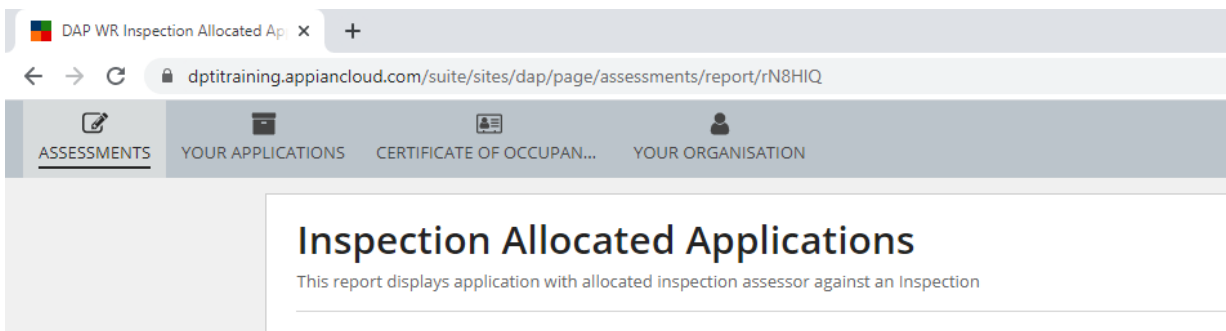
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