

Schedule Assessment

To view a video [Click Here](#)

Scheduling an Assessment will send a Audit/Inspection to someone in your Org and till them to complete it by a certain date.

This means you have full control over what Audits are conducted and at what point

In Order to set this up follow the steps below:

1. Select the Schedule Assessment button either on the Dashboard.
2. Schedule Page or in the Template Builder.
3. Select the Template you wish to schedule.
4. Select the Site and Department you want to associate with this schedule.
5. Select the User you wish to schedule the Assessment to.
6. Select Date and Time you want the Assessment to be carried out by.
7. Select Create.



You can view all the schedules which have been made if you go to the Schedule List, from here you can see if users have started the Audit, completed or if the Audit is still overdue



Scheduling video

Recurring Schedule

You can also create a recurring schedule mean that once a month, week, day or hour you can have a assessment scheduled.

This is a great way to have your daily Audit ready and set up for your Organisation with very little effort.

To set this up follow the steps below:

1. Select the Schedule Assessment button either on the Dashboard.
2. Schedule Page or in the Template Builder.
3. Select the Template you wish to schedule.
4. Select the Site and Department you want to associate with this schedule.
5. Select the User you wish to schedule the Assessment to.
6. Select the start date and time for the recurring schedule.
7. Then select how often you wish to have this repeated
8. And on what days you wish to have it repeat.
9. Finally you can also add a end date if you wish to.



You can identify a recurring schedule with this symbol :

