



Inspection Tracking

Template Set Getting Started Guide

The Inspection Tracking template set allows you to track and report on how job sites or plant floors are meeting your safety standards.

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REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not all premium functionality will be available. [Click here](#) to see a list of discontinued plans.

Get the Template Set

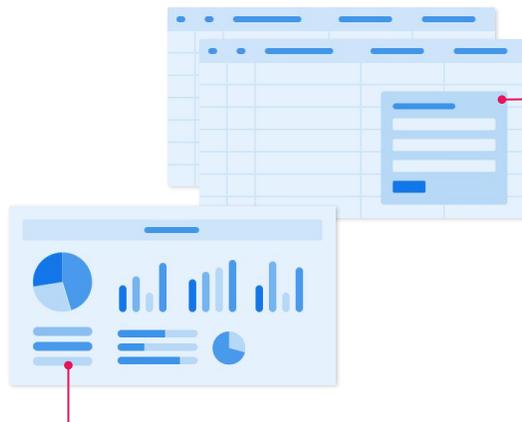
Click the link below and the template set will be added to your Sheets folder. You can find it on the left side of the screen under Sheets.

[Inspection Tracking Template Set](#)



What's Included in the Template Set

With the Inspection Tracking Template Set, you can capture inspection results from superintendents, track safety compliance over time, and display results to executives and key stakeholders.



Safety Dashboard
Show violations and display up-to-date safety metrics in real-time

Inspection Submissions Sheet
Track and maintain all inspection submissions

Inspection Submissions Form
Allow your inspectors to report violations in a standard format

Metrics Sheet
A central repository that summarizes data about your inspection records

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Set Up



Using a [workspace](#) is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

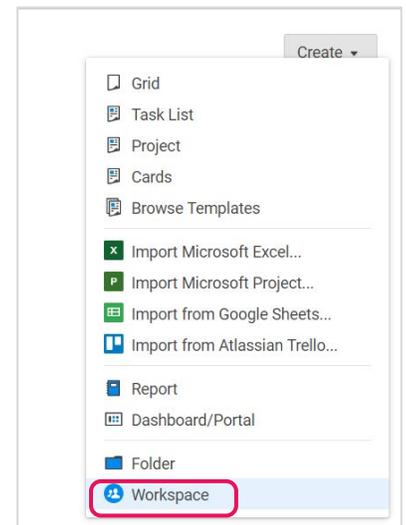
Step 1:

Create a New Workspace

Open *Home*. From the home menu, click the *Create* button in the upper right hand corner. From the drop-down menu, select *Workspace*. Name the workspace.

Learn more:

[Workspaces Overview](#), [Workspace Sharing](#), [Home Tab](#)



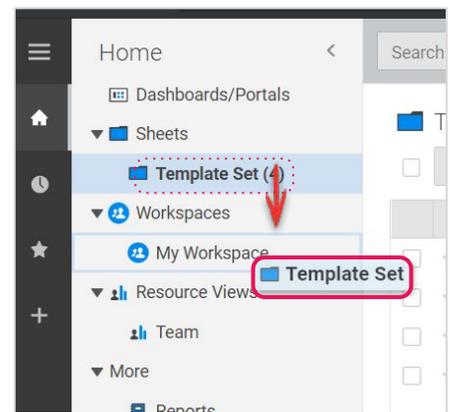
Step 2:

Drag the Files into Workspace

Select the template set folder under your *Sheets* folder. Drag and drop the folder down to the workspace you just created.

Learn more:

[Manage Items in a Workspace \(Add, Move, Remove\)](#)



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Customize

Step 3:

Modify the Inspection Submissions Form

The Inspection Submissions form is how superintendents submit their weekly inspection reports. Submissions are then added to the Inspection Submissions sheet where you can track and maintain inspection reports. The inspection date will be automatically captured when the form is submitted. Open the Inspection Submissions sheet and click on *Forms* in the top menu to customize the form.

- A. Click on *Manage Forms* and then *Edit* to customize the existing fields. You can add or remove fields, change field titles or descriptions, and modify *Form Options*.
- B. Mark fields as *Required Field* that you want to require superintendents to complete.
- C. Click on *Add Field* to add a new field to your form. By adding a new field, you are also adding a new column to the Inspection Submissions sheet. Drag the field into the position where you want place your new field.
- D. Set your form to be filled out by a *registered Smartsheet user* in *Form Options* to ensure that the *Inspector Email* column is automatically populated.
- E. Click *Save* to close the form builder and copy, and save the URL displayed. Give this URL to superintendents who will be submitting an inspection report. You can also share it via email, hyperlink, or embed it on a website or dashboard.

The screenshot displays the Smartsheet 'Forms' builder interface. On the left, a sidebar shows a list of forms, with 'Inspection Submissions' highlighted. The main area shows the 'Inspection Submissions Form' being edited. The form has several fields: 'Inspector Name' (with a red callout B), 'Job Number / Location' (with an asterisk), and a 'MEDICAL' section. The 'MEDICAL' section contains two radio button questions: 'Is there a first aid kit available?' (with a red callout C) and 'Is the first aid kit stocked?' (with an asterisk). To the right of the form editor is a 'Field Options: Medical - First Aid Kit' panel. This panel includes options for 'Label' (radio buttons for 'Use the column name' and 'Use a custom label'), 'Help Text' (a text area), 'Display Type' (radio buttons for 'Dropdown list', 'Radio buttons (vertical)', and 'Radio buttons (horizontal)'), 'Required Field' (checked), 'Hidden Field' (unchecked), and 'Default Value' (a dropdown menu). At the bottom of the form editor are 'Preview', 'Cancel', and 'Save' buttons. A red callout E points to the 'Save' button. A red callout A points to the 'Forms' menu in the top navigation bar.

Learn more:

[Forms, Edit Existing Fields](#)

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Step 4:

Format the Inspection Submission Sheet

The Inspection Submission sheet contains the inspection report information and important items that you would like to track. Use it to collect, track, and maintain records of inspection submission. Color code the columns based on the inspection type (e.g. medical, equipment, etc.) to visually group the submissions sheet and make it easier to read.

- A. Delete rows with example data.
- B. Add or rename columns to best fit your organization needs.
- C. Medical - First Aid Kit is a custom dropdown list column type. To modify the options in the dropdown list, double click on the column header and edit the options under *Values*. Repeat these steps to modify the options in the following columns: Medical - First Aid Stocked, Medical - Emergency Numbers, PPE - Hard Hats, PPE - Eye Protection, PPE - Footwear, and PPE - Hearing.
- D. Enable the alert workflow that has already been set on this sheet to notify anyone shared to the sheet once a day when a new inspection submission has been added. Click on *Automation* and select *Manage Workflows* in the dropdown menu. Click the down-arrow in the upper-right corner of the rule and select Enable.
- E. To view or edit the workflow, double click on the New Inspection Submission Alert workflow in order to open the editor window. Change the options in the *Alert someone* field to who and when you would like to receive the alert.

The screenshot displays a Smartsheet spreadsheet with the following columns: Inspector Name, Inspector Email, Inspection Date, Job Number, Location, Medical - First Aid Kit, Medical - First Aid Stocked, Medical - Emergency Numbers, Medical - Notes, PPE - Hard Hats, PPE - Eye Protection, PPE - Footwear, PPE - Hearing, PPE - Notes, and Additional Notes. The table contains data for five inspectors: Brent Williams, Kirk Caskey, Alexandra Matson, Lori Grimes, and Henry McNeal. A modal window titled "New Inspection Submission Alert" is open, showing a workflow rule: "When a row is added" with a trigger "Alert someone" and a frequency of "Send once a day". The "Alert someone" field is highlighted with a red box and labeled 'E'.

| | Inspector Name | Inspector Email | Inspection Date | Job Number | Location | Medical - First Aid Kit | Medical - First Aid Stocked | Medical - Emergency Numbers | Medical - Notes | PPE - Hard Hats | PPE - Eye Protection | PPE - Footwear | PPE - Hearing | PPE - Notes | Additional Notes |
|---|------------------|-------------------|------------------|------------|----------|-------------------------|-----------------------------|-----------------------------|-----------------|-----------------|----------------------|----------------|---------------|-------------|------------------|
| 1 | Brent Williams | brent@mbfcorp.com | 08/23/18 8:15 AM | | | Yes | No | Yes | | Yes | Yes | Yes | No | | |
| 2 | Kirk Caskey | kirk@mbfcorp.com | 08/23/18 8:15 AM | | | Yes | Yes | Yes | | Yes | Yes | No | Yes | | |
| 3 | Alexandra Matson | alex@mbfcorp.com | 08/23/18 8:15 AM | | | No | No | Yes | | No | No | Yes | No | | |
| 4 | Lori Grimes | lori@mbfcorp.com | 08/23/18 8:15 AM | | | No | Yes | Yes | | No | Yes | Yes | Yes | | |
| 5 | Henry McNeal | henry@mbfcorp.com | 08/23/18 8:15 AM | | | No | Yes | Yes | | No | Yes | Yes | No | | |

Learn more:

[Use the Best Column Type for Your Data](#), [Save Time and Work Faster With Automated Workflows](#), [Creating an Auto-Number Column](#), [Use a System Column to Automatically Add Information to a Row](#)

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Step 5:

Sheet Bonus: View or Edit Your Project Summary Data

For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. The Inspection Submissions with Form sheet includes a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. Here you can see a quick recap of the total violations and what categories they fall under. Open the sheet summary on the right panel to view or edit your project summary fields. You can use formulas and reference another summary fields.

- Click the sheet summary icon to expand the sheet summary. You can expand and collapse the right panel to stay in the context of your sheet or maximize your sheet real estate when you don't need to view it.
- To add fields, click +New Field.
- Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.
- To edit the field properties, hover over the right side of the field and click on the vertical ellipsis (⋮) to open the field options dropdown menu.

The screenshot displays the Smartsheet interface. On the left, a data table is visible with columns: 'Medical - First Aid Stocked', 'Medical - Emergency Numbers', 'Medical - Notes', and 'PPE - Hard Hats'. The 'Medical - First Aid Stocked' column contains values 'No', 'Yes', 'No', 'Yes', 'Yes'. The 'Medical - Emergency Numbers' column contains 'Yes', 'Yes', 'Yes', 'Yes', 'No'. The 'PPE - Hard Hats' column contains 'Yes', 'Yes', 'No', 'No', 'Yes'. On the right, the 'Sheet Summary' panel is open, showing a 'Please provide feedback' link and a section titled 'WHAT IS SHEET SUMMARY?'. Below this, there are several summary fields with values: 'Total Violations' (13), 'Medical - First Aid Kit Violations' (2), 'Medical - First Aid Stocked Violations' (2), 'Medical - Emergency Numbers Violations' (1), and 'PPE - Hard Hats Violations' (2). At the bottom of the panel, there is a '+ New Field' button. A red circle labeled 'A' highlights the sheet summary icon in the right sidebar, and another red circle labeled 'B' highlights the '+ New Field' button.

Learn more:

[Define Your Work with Sheet Summary](#), [Maximize Your Sheet Summary Usage](#), [Create a Portfolio View with a Summary Report](#)

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Step 6:

Setup Inspection Metrics

The Inspection Metrics is entirely driven by formulas. The formulas calculate violations from the Inspection Submission sheet. For any new columns/safety questions added to the Inspection Submission sheet, add a new section and a formula in the Submission Metrics Sheet.

- A. Formulas in the Medical Chart Data and PPE Chart Data sections are counting the nos in the specified column in the Inspection Submission sheet.

=COUNTIF({Your Question Column}, "No")

- B. Edit the *Total Violations* calculation to ensure all your new columns are being counted.

=SUM(A13:G24)

- C. *Violations by Month* counts the violations that happened in a specific month. The Month# column is used to indicate which month to count in the formula.

=COUNTIFS({Your Question Column}, "No", {Submission Date Column}, MONTH(@cell) = \${Month num}@row)

| Month# | Label | A | B | C | D | E | F | G |
|-----------------------------|-------------------------------|-----------------|---------------------|-------------------|--------------------|----------------|----------|--------------------|
| MEDICAL CHART DATA | | | | | | | | |
| | | First Aid Kit | First Aid Stocked | Emergency Numbers | | | | |
| 1 | Medical | 2 | 2 | 1 | | | | |
| PPE CHART DATA | | | | | | | | |
| | | Head Protection | Eye/Face Protection | Footwear | Hearing Protection | | | |
| 1 | Personal Protective Equipment | 2 | 2 | 1 | 3 | | | |
| | TOTAL VIOLATIONS | 13 | | | | | | |
| VIOLATIONS PER MONTH | | | | | | | | |
| | | First Aid Kit | First Aid Stocked | Emergency Numbers | Head Protection | Eye Protection | Footwear | Hearing Protection |
| 1 | January | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2 | February | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 | March | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4 | April | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 5 | May | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6 | June | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 7 | July | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8 | August | 2 | 2 | 1 | 2 | 2 | 1 | 0 |
| 9 | September | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10 | October | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 11 | November | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 12 | December | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Learn more:

[Formulas](#), [Cross-sheet Formulas](#), [COUNTIF](#), [COUNTIFS](#), [SUM](#), [@cell](#)

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Step 7:

Update your Safety Dashboard

The Safety Dashboard provides a visual summary of key inspection metrics. Dashboards consist of different widgets that pull in live information from other sheets and reports.

- Click *Edit* in the upper left corner to begin customizing. Then hover over any widget and select the pencil icon.
- Replace the logo placeholder with your own logo in the *Image* widget.
- Sheet - Inspection Submissions is a *Shortcut* widget that takes you directly to your Inspection Submissions sheet. Feel free to add a shortcut to the URL for the Inspection Submissions form and other documents and resources.
- The charts under Medical Violations, PPE Violations, and Monthly Violations are *Chart* widgets, creating column and line charts from the formula values on your Inspection Metrics sheet.



Learn more:

[Make Changes to an Existing Dashboard](#), [Viewing and Sharing a Dashboard](#), [Widget Types for Smartsheet Dashboards](#)

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Step 8:

Share your Inspection Tracking Template Set

Sharing is the best way to collaborate with others involved in your projects. You can share your entire workspace with members of your department, or share individual items within the workspace. For more information on sharing and permission levels, check out this [infographic](#).

The screenshot shows the 'Sheet Sharing' dialog box with several red boxes highlighting key areas:

- Invite Collaborators:** A text input field with the placeholder 'Enter names or email addresses...'.
- Permissions:** A dropdown menu currently set to 'Editor - can share', with a list of options: Admin, Editor - can share, Editor - cannot share, and Viewer.
- Invite Details:** A section containing a 'Subject Line' field with the placeholder 'Invitation to Edit' and a larger 'Personal message (optional)' text area.
- Options:** Checkboxes for 'Notify people' (checked) and 'Cc myself' (unchecked).
- Collaborators:** A section showing 'Collaborators (0)'.
- Buttons:** 'Cancel', 'Share Workspace', and 'Share Sheet' buttons at the bottom right.
- Context:** A note at the bottom right states 'This sheet is in a workspace: [Template Set Workspace](#)'.

Learn more:

[Workspace Sharing](#)