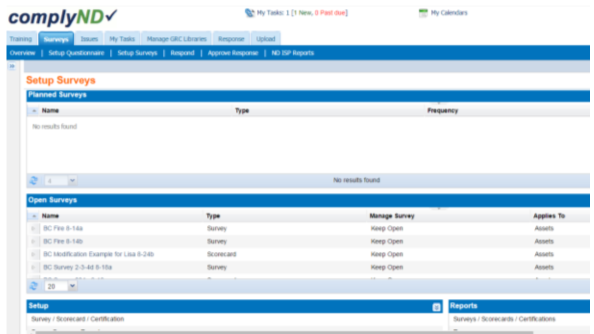
complyND✓ – Set-up and Assign OISP Survey

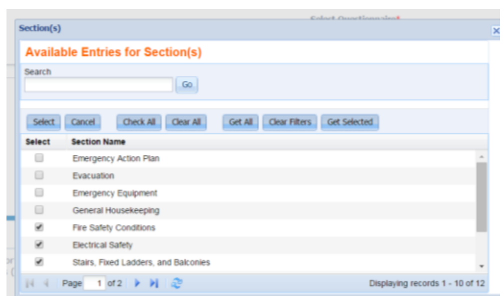
As an inspection admin, you will be able to setup and assign an OISP survey in complyND. Please refer to the ***complyND***✓ Inspection Management User Guide for more detailed information.

Set-up and Assign OISP Survey

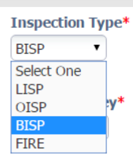
1. Log into **complyND**.
2. From the Survey tab, click **Setup surveys**.
3. From the *Setup* infoport, select **Survey/ Scorecard/Certification**.

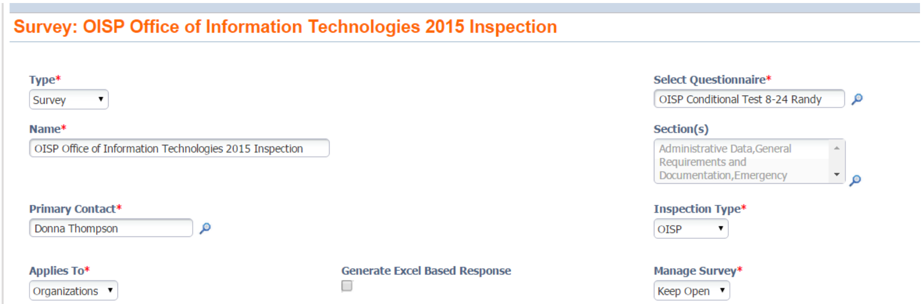
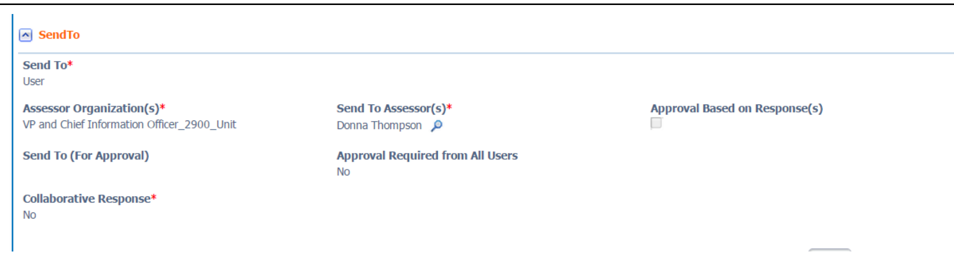


4. Select **Type** (survey, scorecard or certification)
5. Select **Questionnaire**. All questionnaire loaded in the system are available in this popup window.
6. In the **Name** field the questionnaire name automatically fills in. However, since every survey must have a unique name you will need to modify this name.
7. **Choose section(s)**. You can choose one or more sections form the selected questionnaire. This will not normally be necessary.
8. Choose **Primary Contact** (person who will be the issue contact).

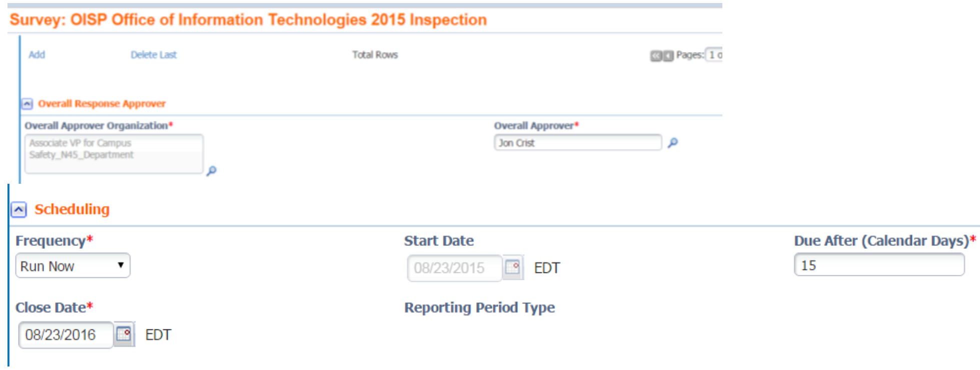


9. In the **Inspection Type** field, choose **OISP**.
10. **In the Applies To** field **Organization** is auto filled based on the fact that an OISP questionnaire was selected
11. **Generate Excel Based Response** (check or not?).

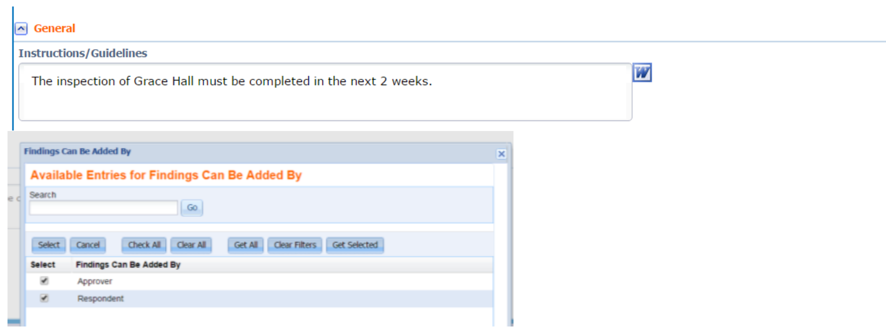


12. In the **Manage Survey** dropdown field select **Keep open** in order to keep the survey open until all issues have been resolved.	
13. On the **Details** tab the option **Select From a Filtered List (Better for Large Surveys & Certifications)** is selected by default. Change it to **Select One or More Individual Items (Better for Smaller Surveys & Certifications)** 14. In *Select Individual Items*, use the filters to search for the specific organization.	
15. In *Send To*, select **User** (user and role are the options) in the **Send To** dropdown field. 16. Select the **Assessor Organizations(s)** and **Send to Assessor(s).** These fields are searchable. 17. Leave the **Approval based on response(s)** unchecked. 18. **Send to (For Approval)** is not a required field. 19. In the **Approval Required from All Users** field, normally you will select **No**. 20. In the **Collaborative Response** field, normally you will select **No**.	

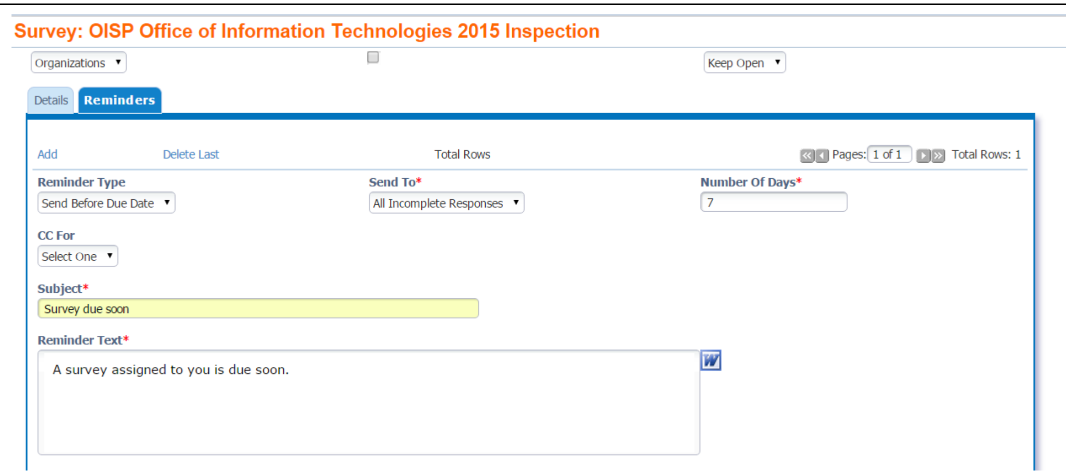
21. In *Overall Response Approver*, select the **Overall Approver Organization** and the **Overall Approver**.
22. In *Scheduling*, select the **Frequency,** the **Start Date**, **Due After (Calendar Days)** and **Close Date**. The Start Date will auto fill with today's date. The Close Date must be far enough in the future to allow time for all issue to be resolved (i.e., work orders to be completed). Survey cannot be reopened after the close date.

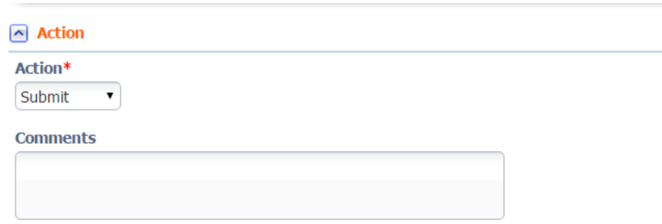
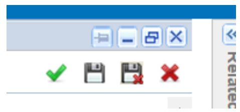
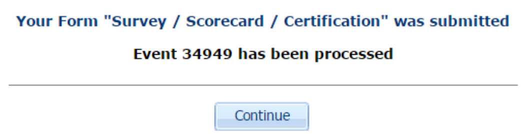


23. In *General*, in the **Inspections and Guidelines** field, use Word text box to add any instructions for the inspection.
24. In the **Findings Can Be Added By** field, if you are both the Assessor and the Approver, select both **Approver** and **Respondent**. Otherwise, just select Approver.
25. **Auto-create findings for overdue responses** ?



26. If you want to send reminder email, click on the **Reminders Tab**.
27. In **Reminder Type** you can choose from **Send before due date**, **Send on due date**, **Send after due date**, or **Send now**.
28. In **Send to** choose from **All incomplete responses** or **All respondents**.
29. The **Number of Days** option applies to the number of days before or after the due date when you want the email sent.
30. You can send a copy of the email to another role or user, but neither **Cc for (user or role)** nor **Cc** is a required field.
31. Both **Subject** and **Reminder text** are required fields.



32. Once you have completed both the *Details* and the *Reminders*, you are ready to submit the survey. In **Actions**, choose **Submit**. 33. Any comment you enter in **Comments** will become part of the survey's comment history. This is not a required field.	
34. Click the green checkmark to submit the survey. 35. A popup window will open to tell you that your survey has been accepted. Click **Continue** to accept the message. *NOTE: See Chapter 4, Inspection Management Solution, in the **complyND Inspection Management User Guide** for more detailed information.*	 

Notes Section, if applicable