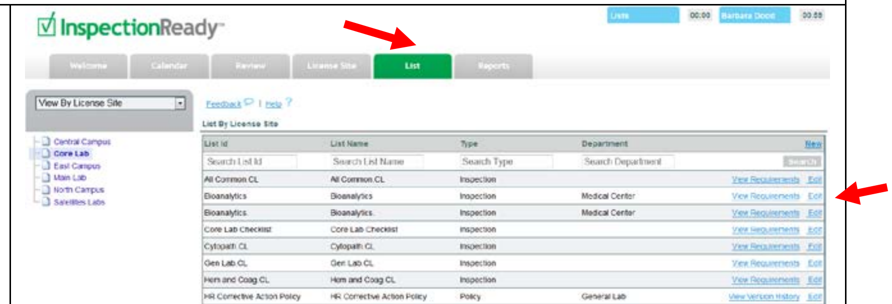
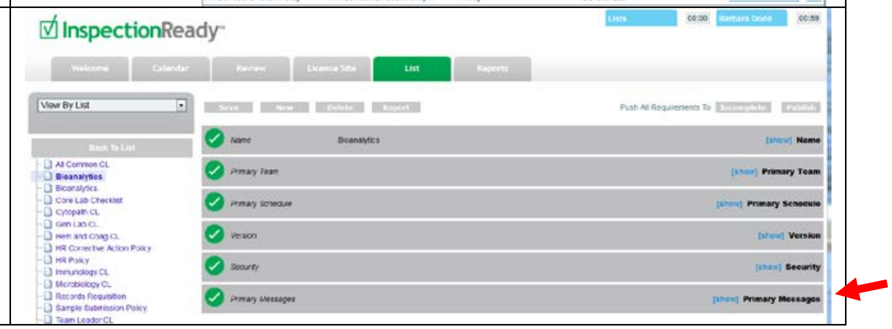
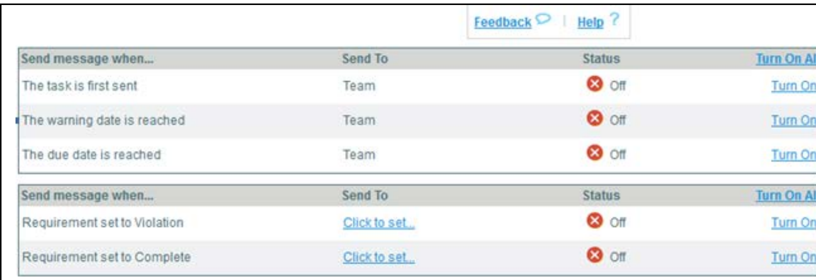
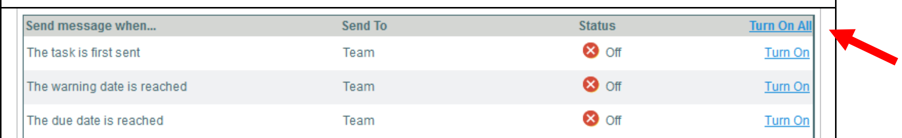
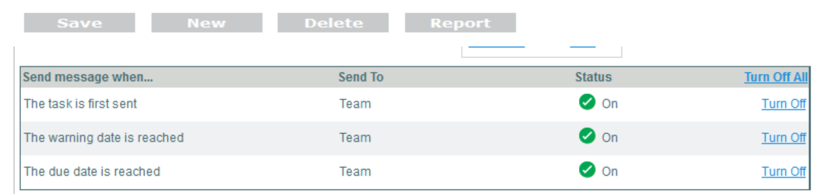
Inspection – Primary Messages

Step	Action	
1.	Navigate to the **List Site Tab**. Select the License Site you want to work in, and in this example, Core Lab is the License Site. Select Edit for the Bioanalytics Inspection List.	
2.	Select the **Primary Message** color bar to expand.	

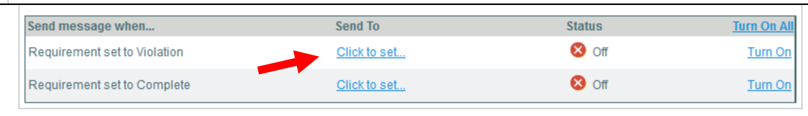
3.	The Inspection Primary Message color bar lists the options for sending an email to the Inspection team and the workflow. Send message to Team when... • <u>The task is first sent:</u> Sent out when the task is first sent to the team. • <u>The warning date is reached</u>: Sent out when the warning due date is reached. Sent to the team • <u>The due date is reached:</u> Sent out when the due date is reached. Sent to the team Send message to list when... • <u>Requirement set to Violation:</u> Sent when the Inspection Item is set to Violation. Sent to the workflow. • <u>Requirement set to Complete:</u> Sent when the Inspection Item is set to Complete. Sent to the workflow. • <u>Send To:</u> The employee or the selected workflow. This must be set to turn on the Message Condition. Select Click to set.. to pick a workflow from the workflow picker. Select a workflow name to change the workflow.	
4.	We have chosen to have all three emails sent. To do this, select Turn On All. If you only want one or two messages sent, select Turn On to only the ones you want sent. Select Turn On All.	

5. Select **Save**.



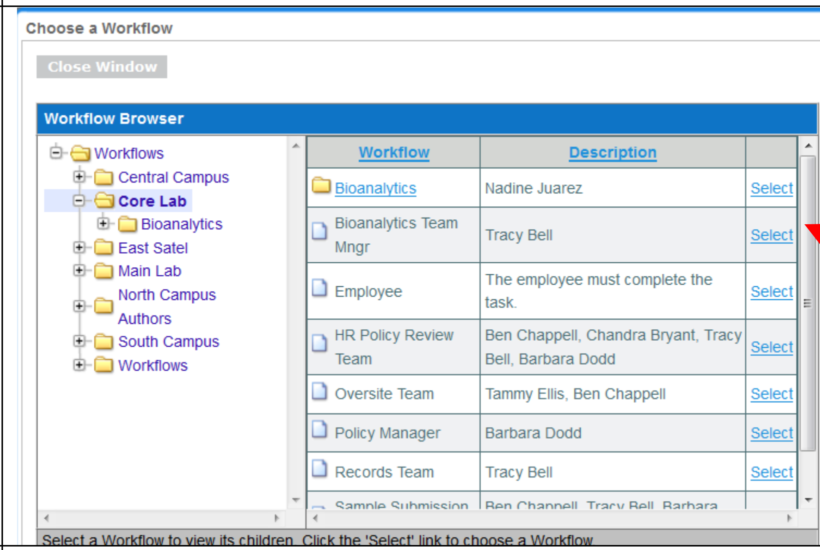
6. Now we decide if we want anyone (manager, etc.) to receive a message when the requirement is set to violation (not completed on time) or when it is completed.

Select Click to Set.

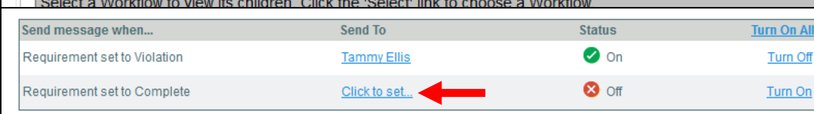


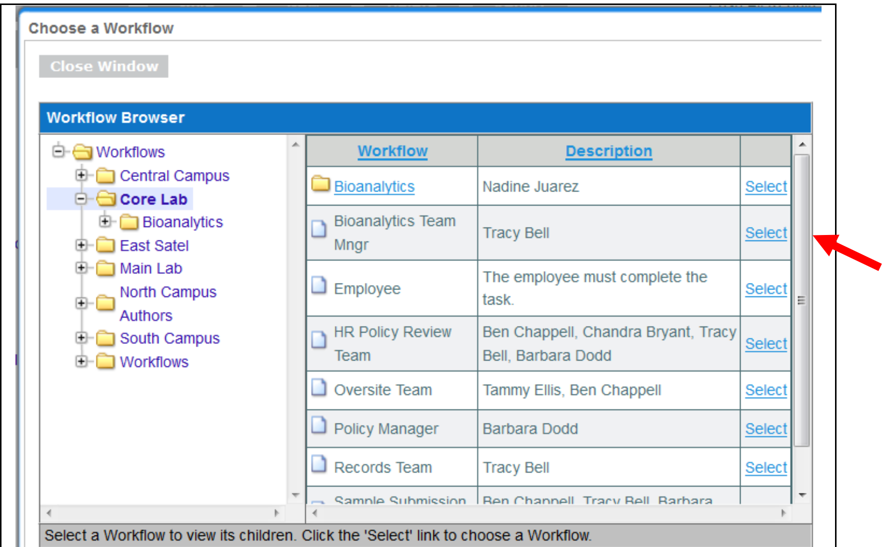
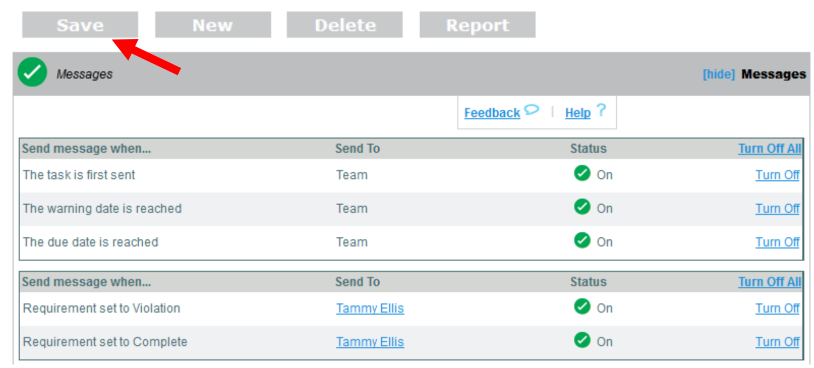
7. Remember, these teams need to be set up in the License Site Tab/ Team Builder color bar.

In this example, Tracy Bell will be selected by choosing Select.



8. To select an employee to receive a message when the Requirement is set to Complete, select Click to Set.



<table>
<tr><td>9.</td><td>Again, select Tracy Bell to receive this message by choosing Select.</td><td>
</td></tr>
<tr><td>10.</td><td>Choose Save.</td><td>
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