SAFE Program Help

Created on 11-01-2023
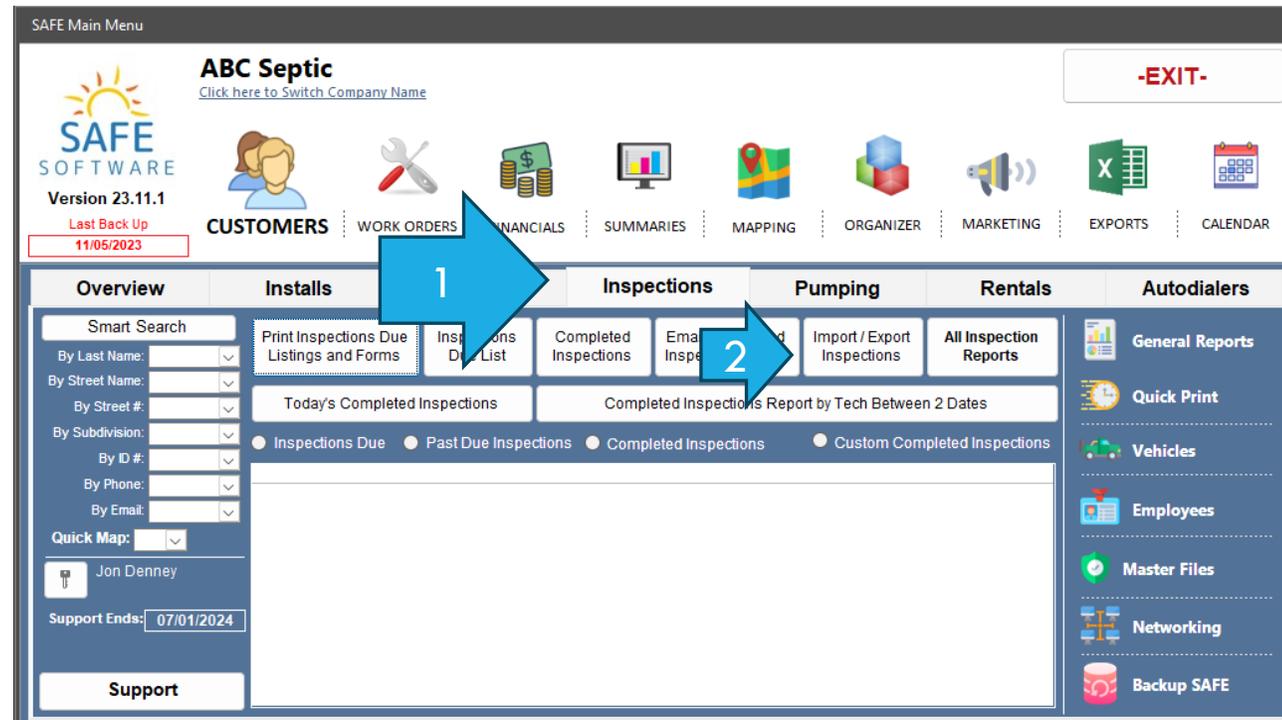
SENDING INSPECTIONS TO MONTGOMERY COUNTY

BACKGROUND INFORMATION

Montgomery County EHD is going with the Inspect2Go Program for their permitting, etc. Several years ago, they (Inspect2Go) contact me to see about working together to add a permitting section to their program. They are an online program and SAFE is a PC-based program, so I thought the "partnership" would be a good idea.

We worked together to develop a permitting side for Montgomery County so they could move out of their old system and into the Inspect2Go platform. Inspect2Go only provides a software platform for health departments – not private Service Companies or Installers. I wanted to make sure that their system would be able to IMPORT data from Inspection Results entered by Service Companies working in their county. We developed a system very similar to the current way that companies can send their completed inspections through a "txt" file to an Agency using SAFE. The file, however, is in an Excel format. It was easier for the Inspect2Go developers to create the import process using Excel, so we created a separate location in the SAFE Export menu for specifically that. The next few pages will explain the process

STEPS FOR VERSION 23.8 AND HIGHER

1. Inspections Tab

2. Import/Export button

STEPS FOR VERSION 23.8 AND HIGHER

3. Select the button that says "To Your Agencies" in the "Exports Inspections" Tab

4. Select Montgomery County (or however you have them listed) in the Agency box

5. Select the date range the inspections were ENTERED into SAFE

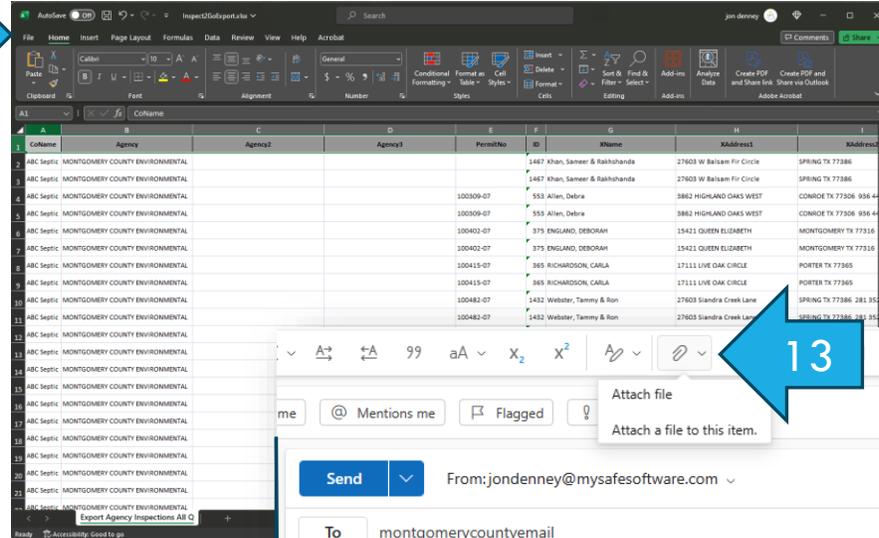6. Click the button that says "Export for Agencies using Inspect2Go"

STEPS FOR VERSION 23.8 AND HIGHER

7. Click "OK" to the help box

8. Click "NO" to the box asking you about sending Duplicates. Their program should be able to bypass any duplicates that were in a previous export/import.

9. Click "OK" to the statement about "Flagging all selected Inspections as sent to agency".

10. You will see all the inspections on a report that you can print if desired.

STEPS FOR VERSION 23.8 AND HIGHER

11. If you have Microsoft Excel installed on your PC or Cloud Platform, the Excel Spreadsheet of Completed Inspections will appear called "Inspect2Go Export"

12. Open your desired email program and click NEW to create a new email to Montgomery County EHD. Compose a new email and enter information in the Subject and Body of the email.

13. Click the "Attach File" button (most likely a paperclip icon).
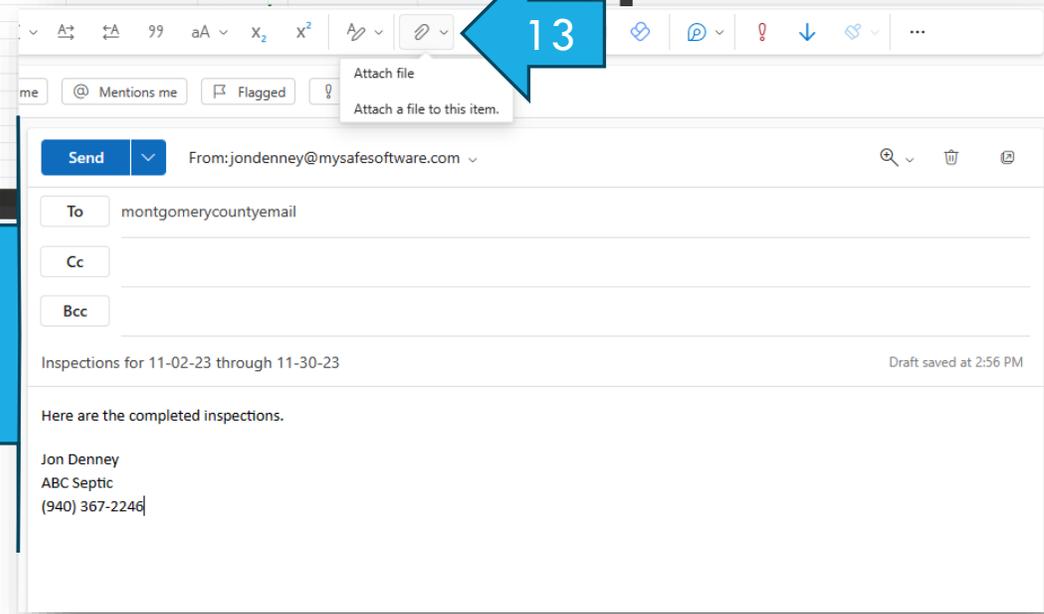
STEPS FOR VERSION 23.8 AND HIGHER

14. Click "Browse this computer" or something like this.

15. Click on the location called "Windows (C:) or "This PC" then "Windows (C:)"

16. Double-click on the "SAFE Excel" folder and it will open.

17. Double-click on the file called "Inspect2GoExport.xlsx" or it may only say "Inspect2GoExport". This will attach the file to the email.
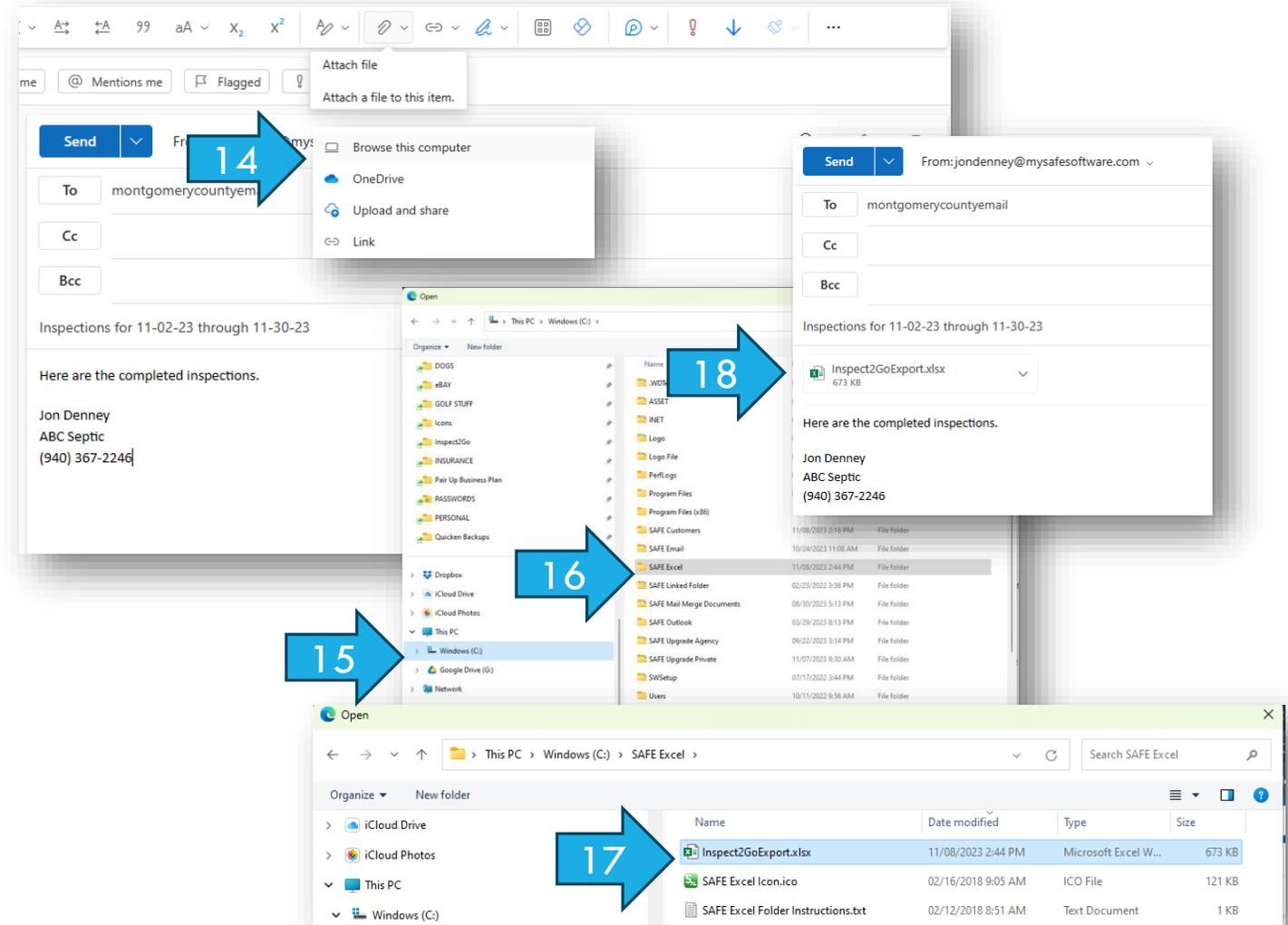
CONTACT US FOR MORE ASSISTANCE

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