CHECKLIST USER GUIDE

DOCUMENT MANAGEMENT

INEIGHT

Release 19.7

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CONTENTS

CHAPTER 1 – INTRODUCTION TO CHECKLISTS

1.1 CHECKLISTS IN INEIGHT DOCUMENT

The InEight Document Checklist Module provides a powerful mechanism for creating and completing a number of different types of fully customizable, responsive checklists within InEight Document.

Features of this module include:

- Quick and simple way to create new electronic checklists based on fully customizable templates
- Wide variety of field options available including Y/N options, date fields, text fields and file attachments (including photos)
- Mobile functionality, with an intuitive and streamlined interface for both mobile devices and the desktop environment
- Real time data collection to increase workplace efficiency
- Checklist Register with Status and Progress fields to facilitate Checklist management.

1.2 TERMINOLOGY

The following terms are associated with Checklists in InEight Document.

Checklist Type: This field denotes the different Checklist templates available on a project.

Checklist Sections: Areas of the Checklist where access and other configuration settings can be controlled separately.

Section Items: Numbered items within a section that each require completion.

Response Type: Type of response required against a section item.

For Action: Field to denote users with full visibility of the Checklist and ability to complete responses.

For Information: Field to denote users with read only access to the Checklist. They can view the Checklist but are not able to complete responses.

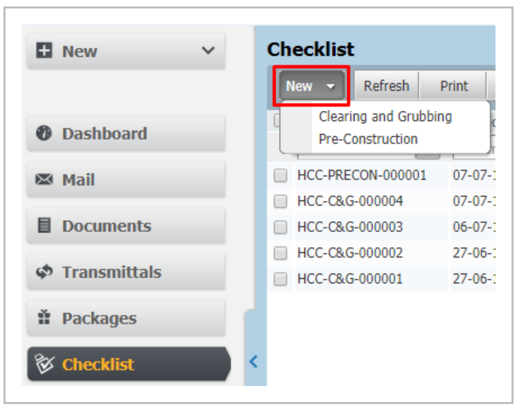
Verification: Point at which the final user is able to verify Checklist completion.

Published: If a Checklist Type is published, it can be used by those with sufficient permissions, to create Checklists.

CHAPTER 2 – PARTICIPATING IN A CHECKLIST

2.1 STARTING A NEW CHECKLIST

1. Click on the **Checklist** Module to open the Checklist Register.
2. Click **New** and select the Checklist Type to be created.



3. Ensure that all mandatory fields are populated. This includes For Action, assigning a Verifier, and any field with a red asterisk *.
4. Click **Save** to save the checklist without issuing. It can be issued at a later date as required.

NOTE	
	• The "For Action" field recipients need to update one or more sections of the Checklist. • The "For Info" recipients are not able to edit field values in the Checklist sections but can view the Checklist as it is being worked upon.

2.2 ISSUING A NEW CHECKLIST

1. Locate and open the Checklist from the Checklist Register.
2. Click **Issue** in the upper left corner of the Checklist.

NOTE When issued, overdue or completed, notifications will be sent to the For Action and For Information users listed.

2.3 PARTICIPATING IN A CHECKLIST

1. Click on the **Checklist** Module to open the Checklist Register.
2. Double click on the Checklist that needs an action completed.
3. Complete the items as required in each section. The items may have different associated response types such as free text, checkbox, dates etc.
4. Click **Complete** to notify the system that you have completed the relevant Sections and move the Checklist onto the Verifier.

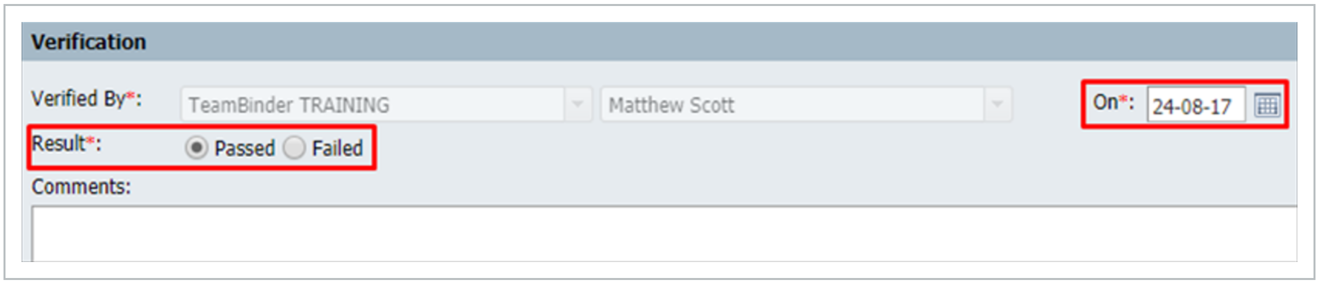
NOTE Click **Save** to save progress on the Checklist. It can then be edited at a later time as required.

2.4 VERIFYING A CHECKLIST

Once all Checklist Sections have been completed, the Checklist will need to be checked by the Verifier, (as defined when the Checklist was first issued).

To verify a Checklist:

1. Double-click the Checklist from the Checklist register.
2. Locate the Verification section of the Checklist.
3. Select whether the Checklist has passed or failed.
4. Add any required comments.



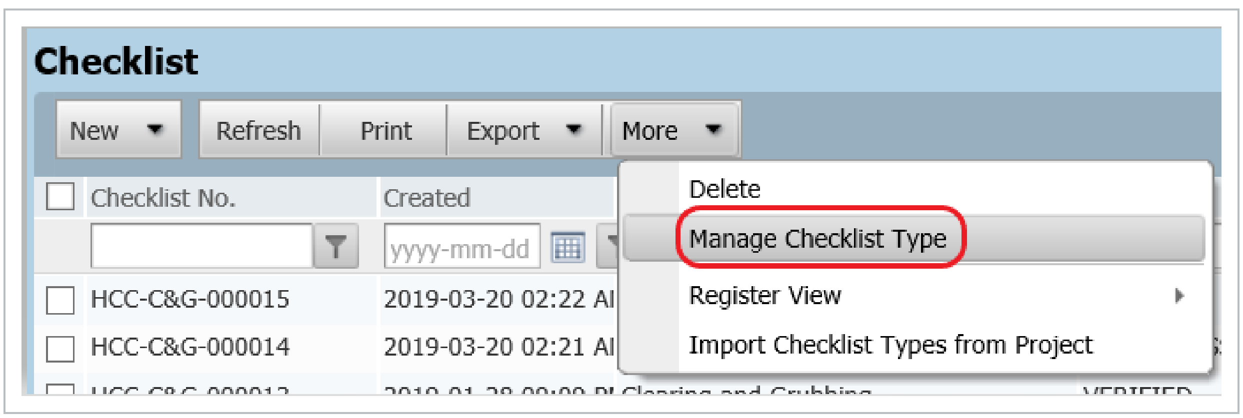
CHAPTER 3 – CHECKLIST TYPES

InEight Document Checklists can be created by Project Administrators. Administrators can also define sections, questions and response types.

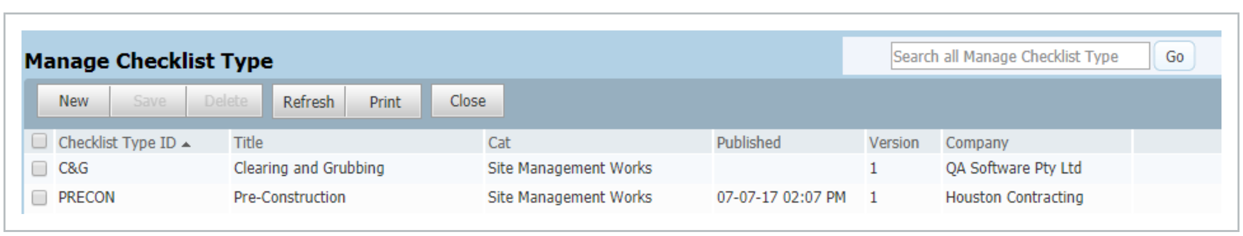
3.1 CREATING A NEW CHECKLIST TYPE

To create a new Checklist Type:

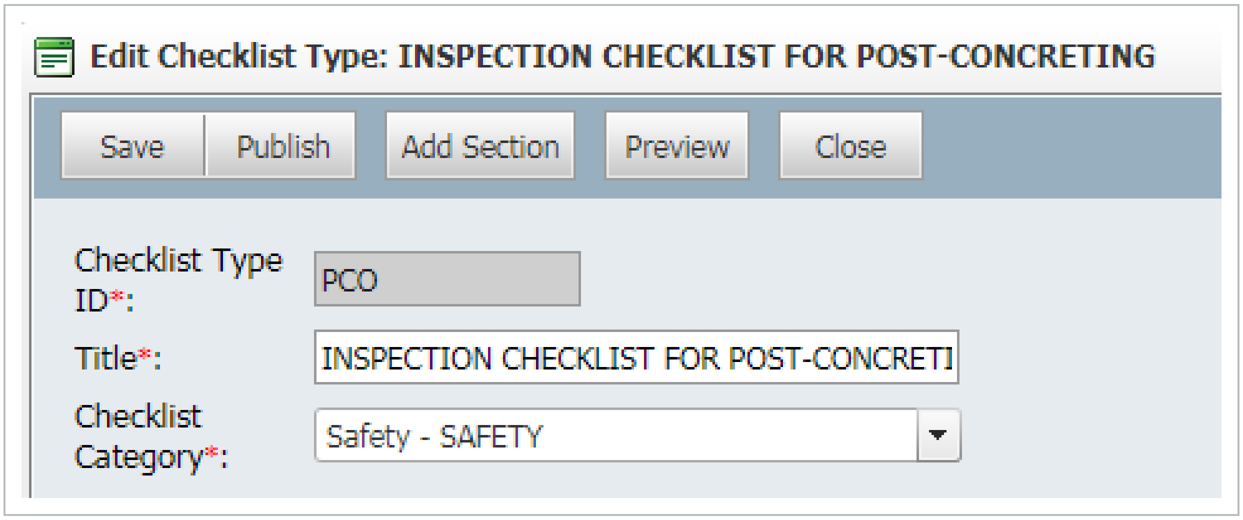
1. Open the **Checklist** Module.
2. Select **More** from the top Menu.
3. Click **Manage Checklist Types**.



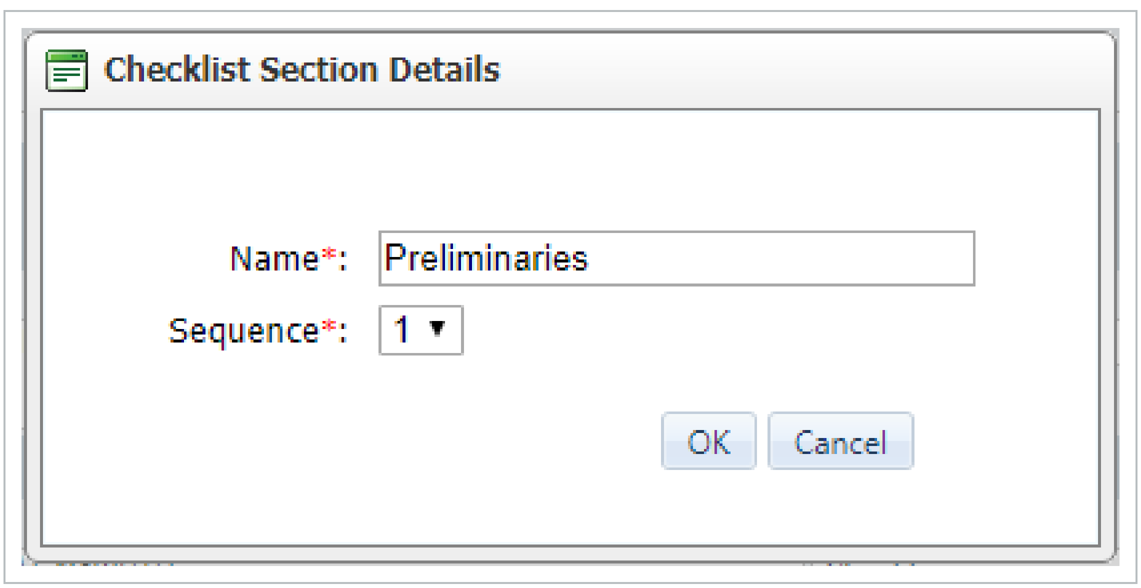
4. A list of existing templates will be displayed.



5. Click **New** to create a new Checklist Type.
6. Enter a Checklist ID, Title and Checklist Category.
7. Checklist ID – this is an abbreviation of the title and will appear in the Checklist reference number.
8. Title – this is the title of the checklist and should give a clear indication of what the Checklist will be used for.
9. Checklist Category – this provides a classification for numerous checklists e.g. Safety, Earthworks, Site Inductions.



10. Select **Add Section** from the New Checklist Type window. There is no limit to the number of sections that can be added.

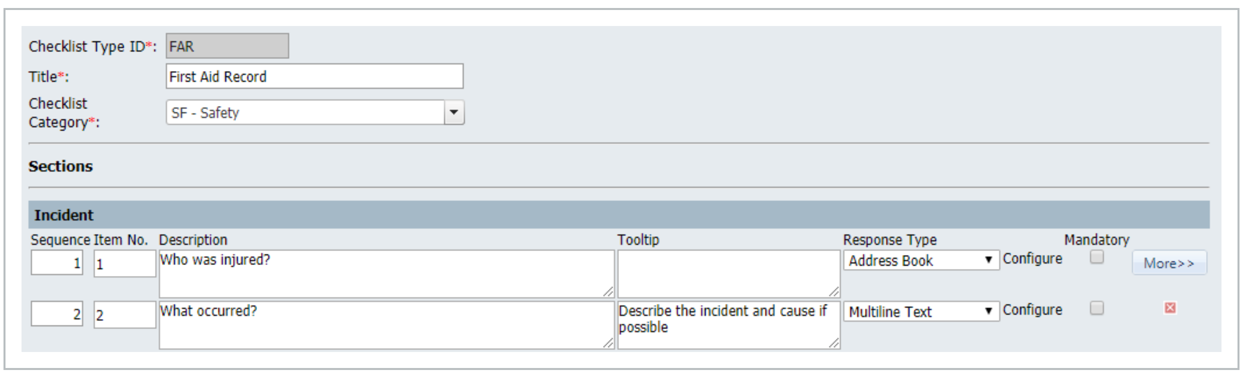


8. Specify the section name (which will appear as the header for that section) and sequence (the order in which sections appear).
9. Any number of sections can be added to a Checklist, however, within each section at least one section item must be specified.
10. Click **Save** to save the Checklist.

3.2 ADDING ITEMS TO A SECTION

When specifying section items, the following details must be provided:

1. Item sequence – defines the order in which items appear within that section.
2. Item number – the item number which will be displayed on the Checklist.
3. Description – details of the item to be completed.
4. Tooltip – text to appear when mousing over the Checklist item.
5. Response Type – how the recipient (For Action) must complete their response e.g. single line of text, checkbox or date field. See detailed descriptions.
6. Mandatory – whether that item is mandatory within the Checklist.



NOTE Additional items can be added to the section by clicking the **More>>** option.

3.2.0.1 Response Types

The following Checklist Response Types are available:

Text: Allows a single line of text to be typed.

Date: Text box in format of dd-mm-yy and a date picker.

Checkbox: A single checkbox to be ticked.

Label: Free text used to provide information that does not require a direct response.

Attach File: Allows supporting file(s) to be attached.

Text Area: Allows multiple lines of free text to be typed.

Yes/No: A dropdown box with the option to select “Yes”, “No” or “N/A”.

Checkbox Group: Allows a user defined list of checkboxes which can be ticked individually.

Dropdown List: Allows a dropdown list of Administrator defined options.

Configuration Table: Allows a dropdown list selection from an existing InEight Document Configuration Table.

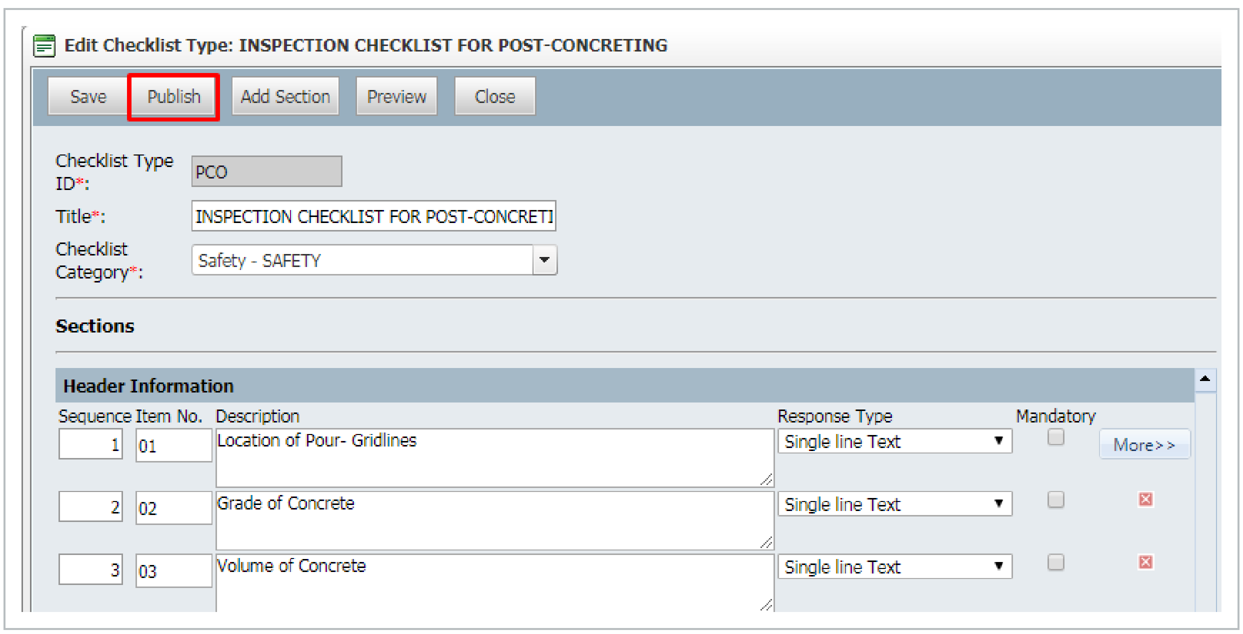
Address Book: Allows the selection of a Company and subsequent Contact.

TeamBinder Action: Allows TeamBinder Actions (Only Forms at this stage) to be raised from the checklist and linked (see "Creating a Form from a Checklist")

3.3 PUBLISHING A CHECKLIST

Once a Checklist Type has been saved, it does not automatically become available to end users and is only kept as a template. To make a Checklist available to project participants it must be published as follows:

1. Locate the Checklist in the Manage Checklist Types screen.
2. Double click the Checklist and click Publish to make it available.



NOTE

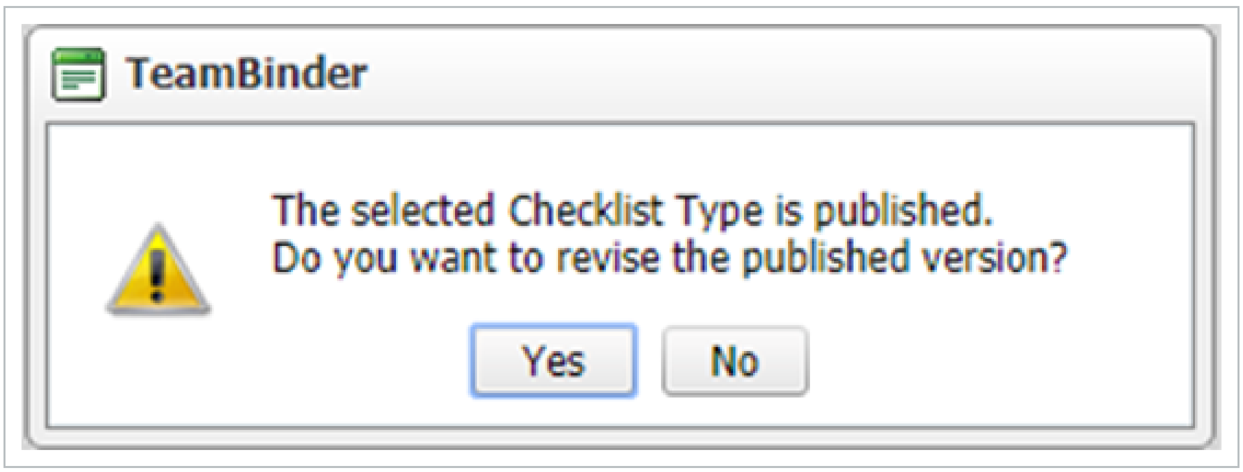
- The Input template can be viewed by clicking **Preview**.
- The Output can also be viewed on an active Checklist by clicking **Print** and **Print Preview.**

3.4 REVISING A PUBLISHED CHECKLIST TYPE

Checklist Types can be modified by Administrators. This includes Checklist Types that are currently in use. The Checklists in circulation will not have their layout changed, only new Checklists created after the updated Checklist is published.

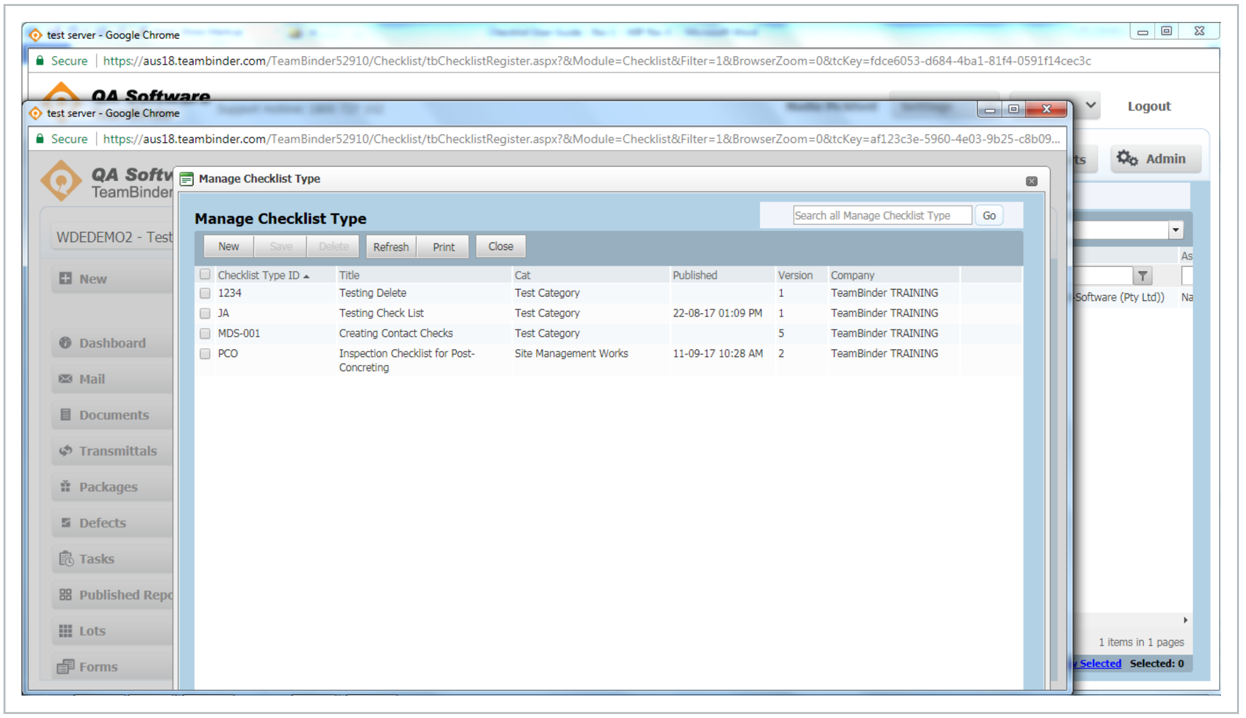
To update a Checklist Type as an Administrator:

1. From the Checklist Register, select **More**, then **Manage Checklist** Type.
2. Double click the required Checklist Type. You will receive the following prompt:



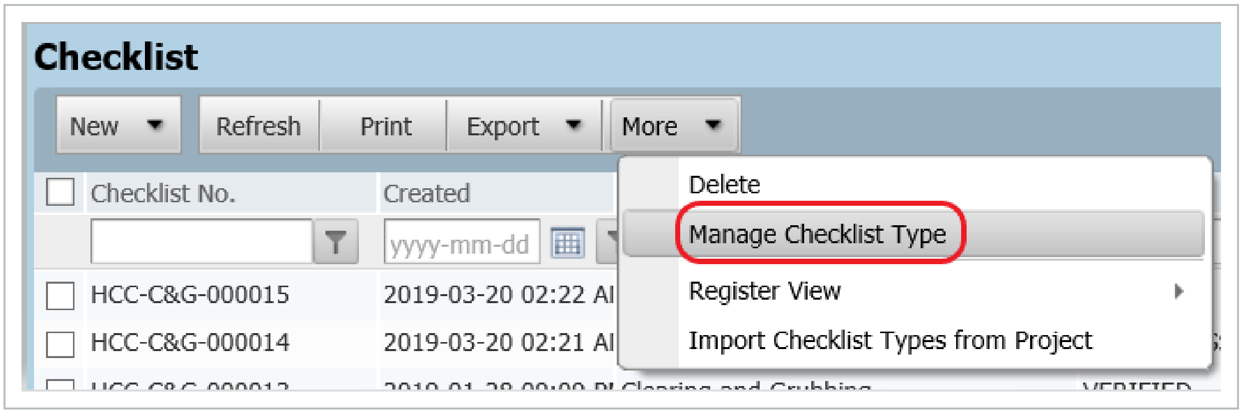
3. Select **Yes** to update the Checklist Type.
4. Once all updates are made, click **Publish** to update the form. The version of the form will

increase incrementally each time the form is updated.

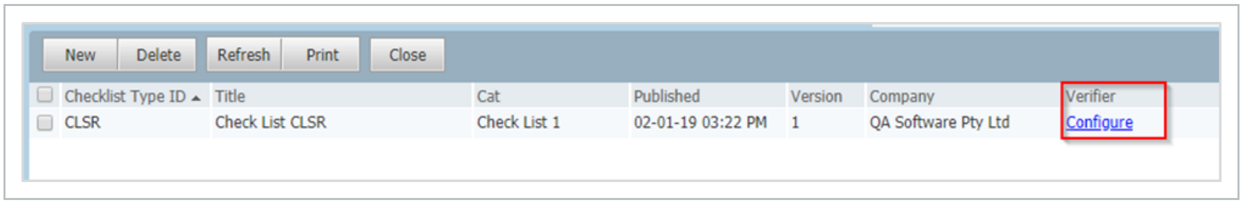


3.5 RESTRICT VERIFIERS BASED ON CHECKLIST TYPE

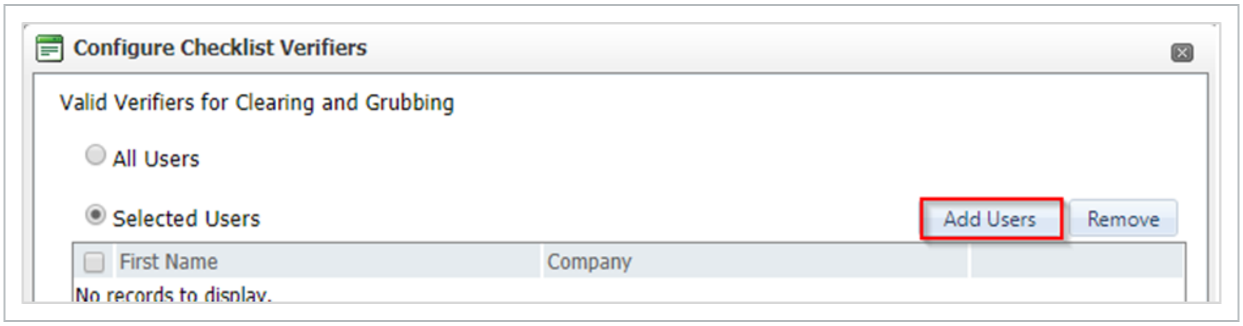
1. Select the **More** dropdown menu and click **Manage Checklist Types.**



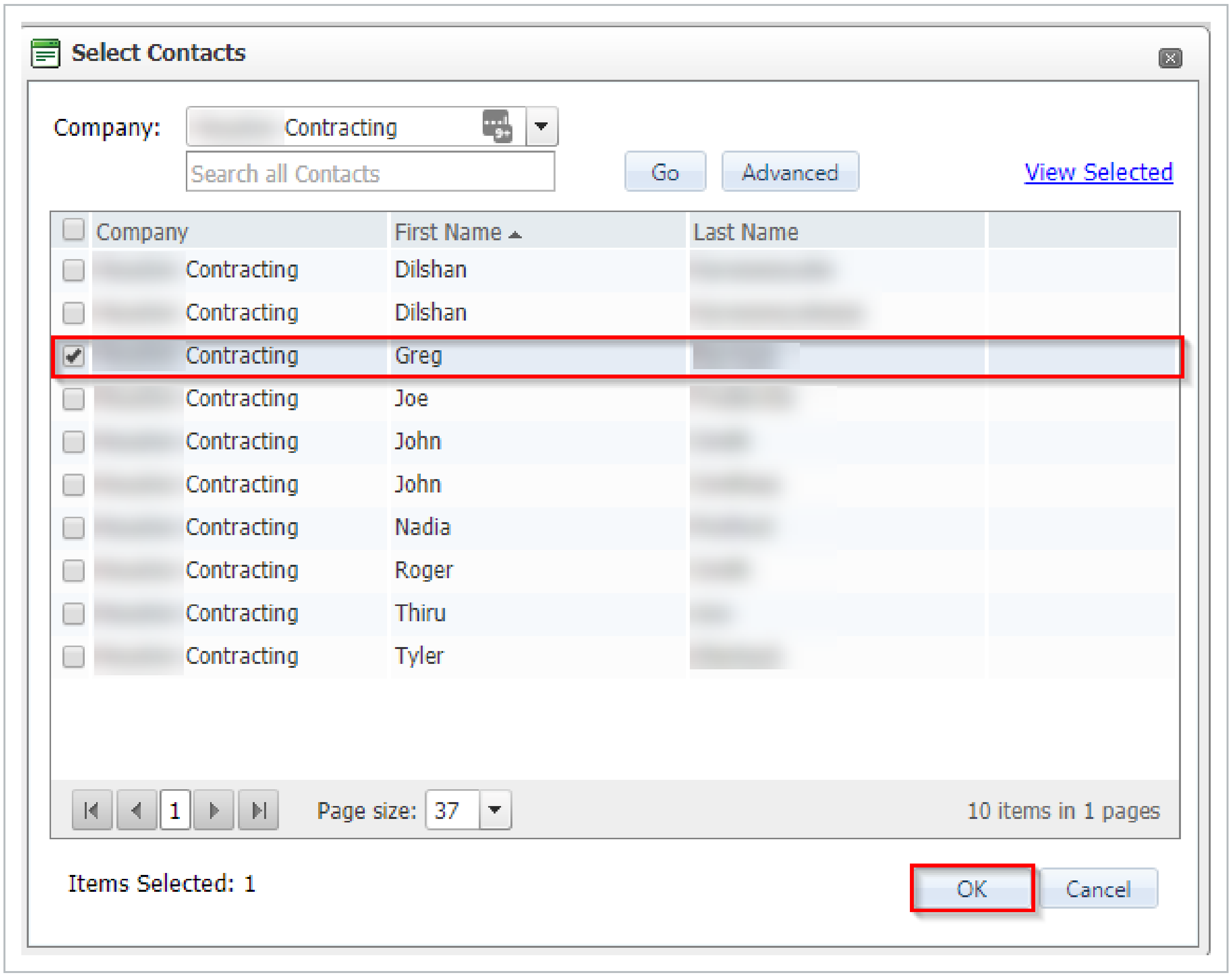
2. Click **Configure** in the Verifier column.



3. Select **Add Users**.



4. Select the users to be listed as verifiers and select **OK**.

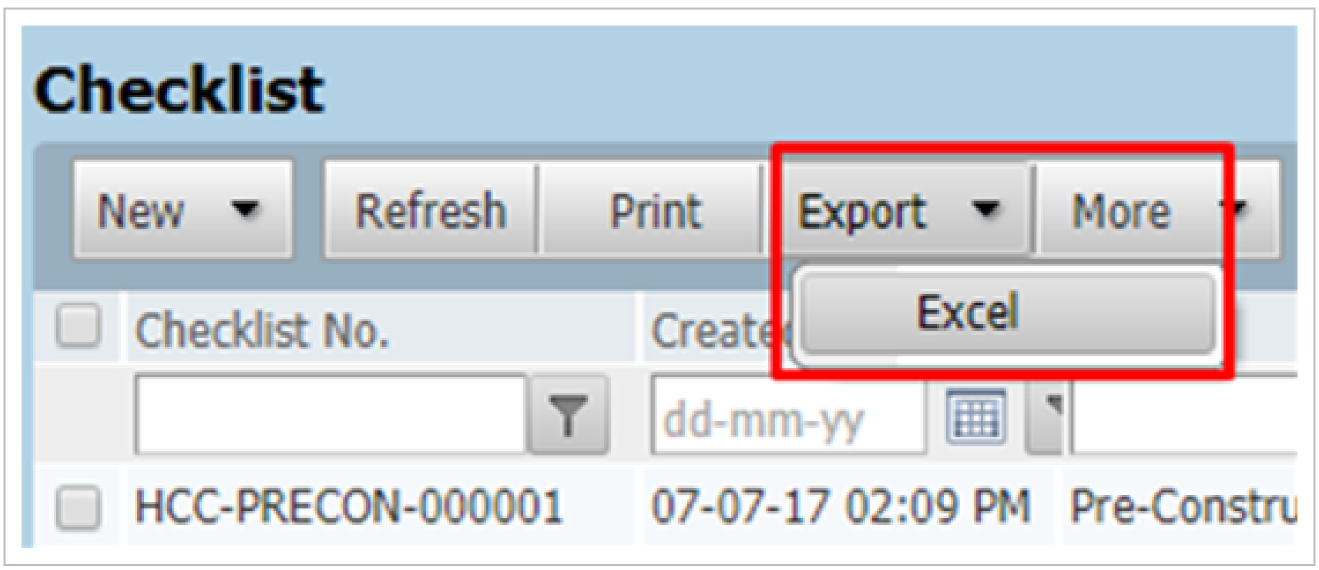


5. Select **Save**.

CHAPTER 4 – ADDITIONAL CHECKLIST OPTIONS

4.1 CHECKLIST EXPORT

From the Checklist Register select the **Export** button then **Excel**.



NOTE The Export function exports all the visible metadata from the current Register view.

4.2 DELETING A CHECKLIST

To delete a checklist (so long as relevant permissions are enabled):

1. From the Checklist Register select the tick box against Checklist(s) to delete.

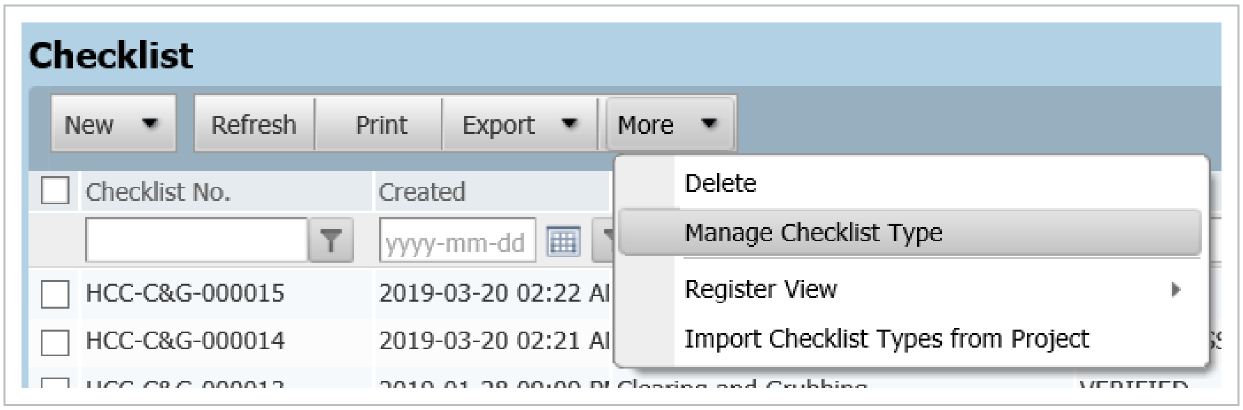
2. Click **More**, then **Delete**.

NOTE	Users can delete Checklists that they have created but only if they are not yet issued.

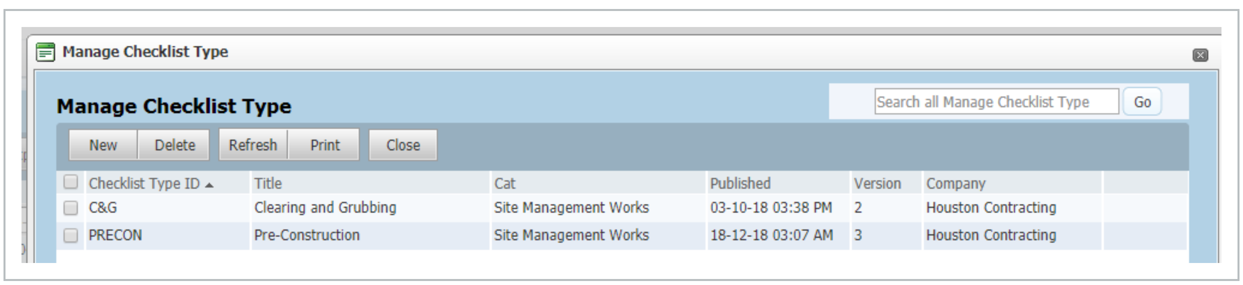
4.3 CREATING A FORM FROM A CHECKLIST

Sometimes items on a checklist generate another action or process within InEight Document. To help streamline the creation and automatic linking of these items, it is possible to generate a Form directly from a Checklist.

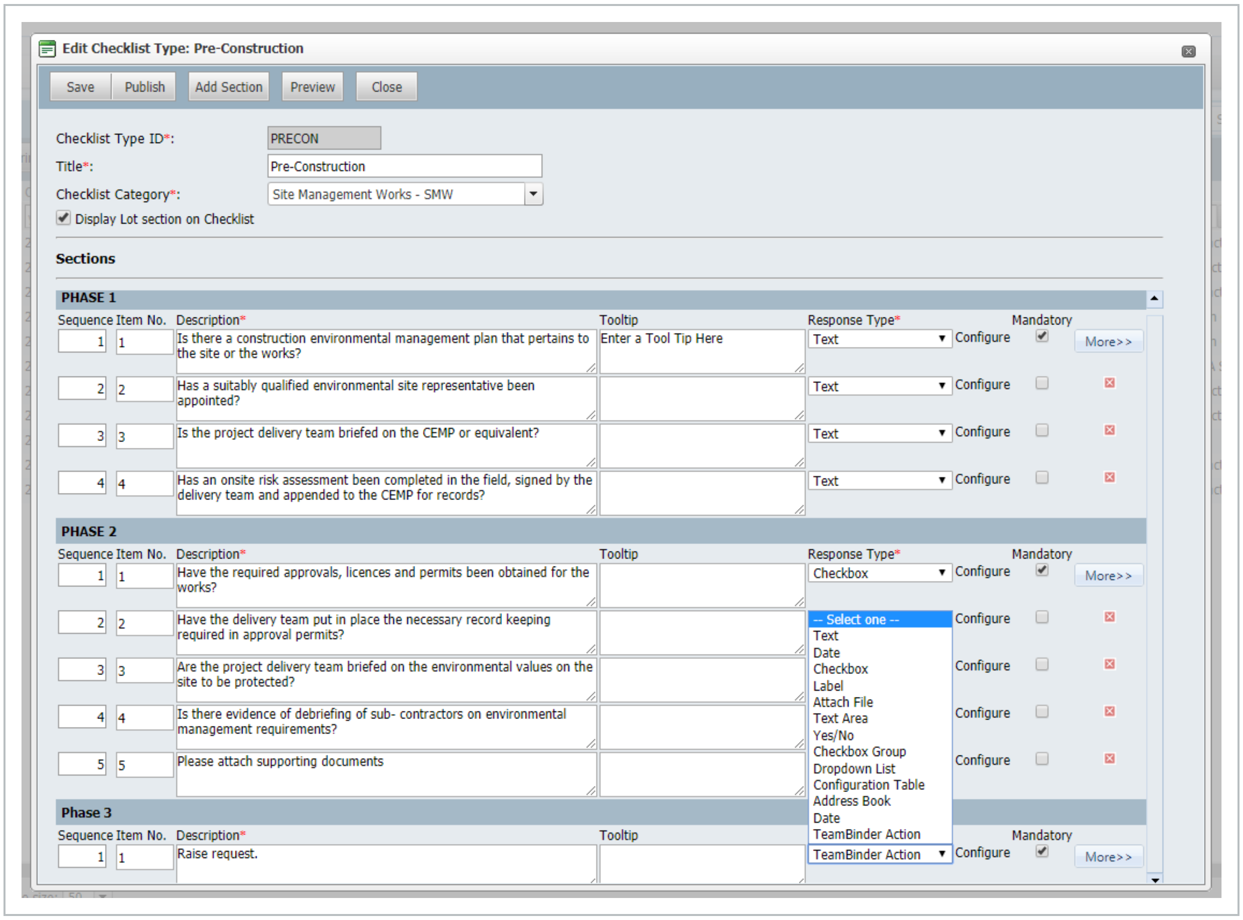
1. In the Checklist register, click **More** then **Manage Checklist Type**.



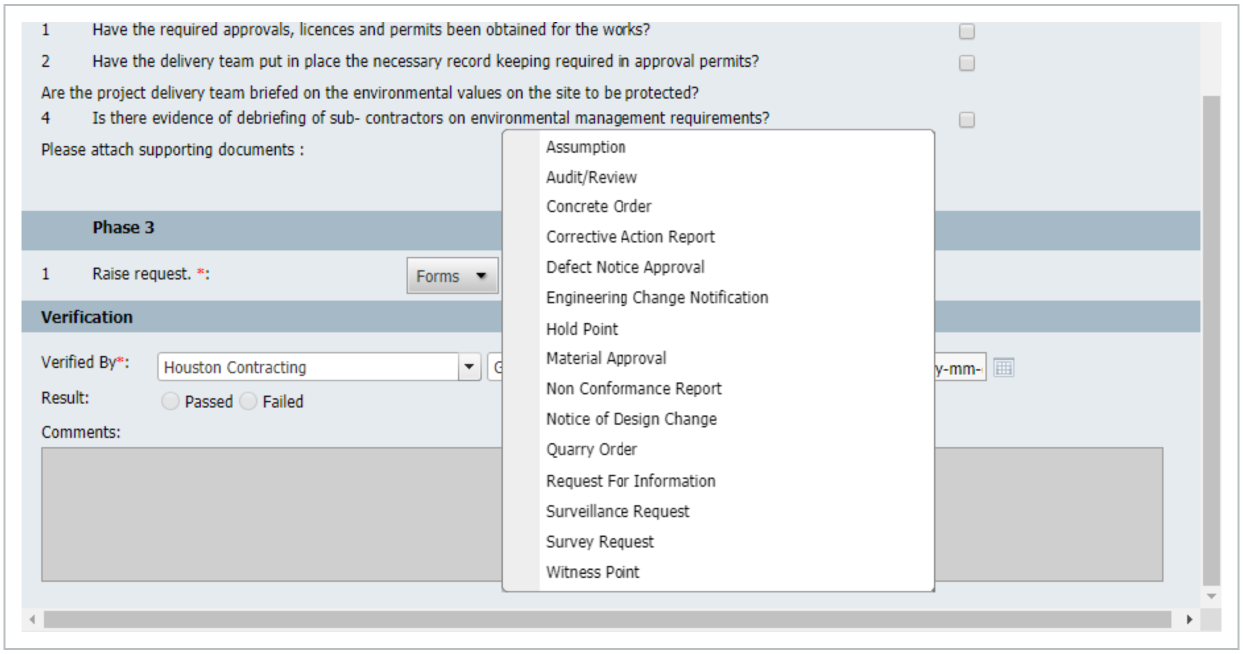
2. In the Manage Checklist Type window, double-click on the existing checklist type or create a new checklist type.



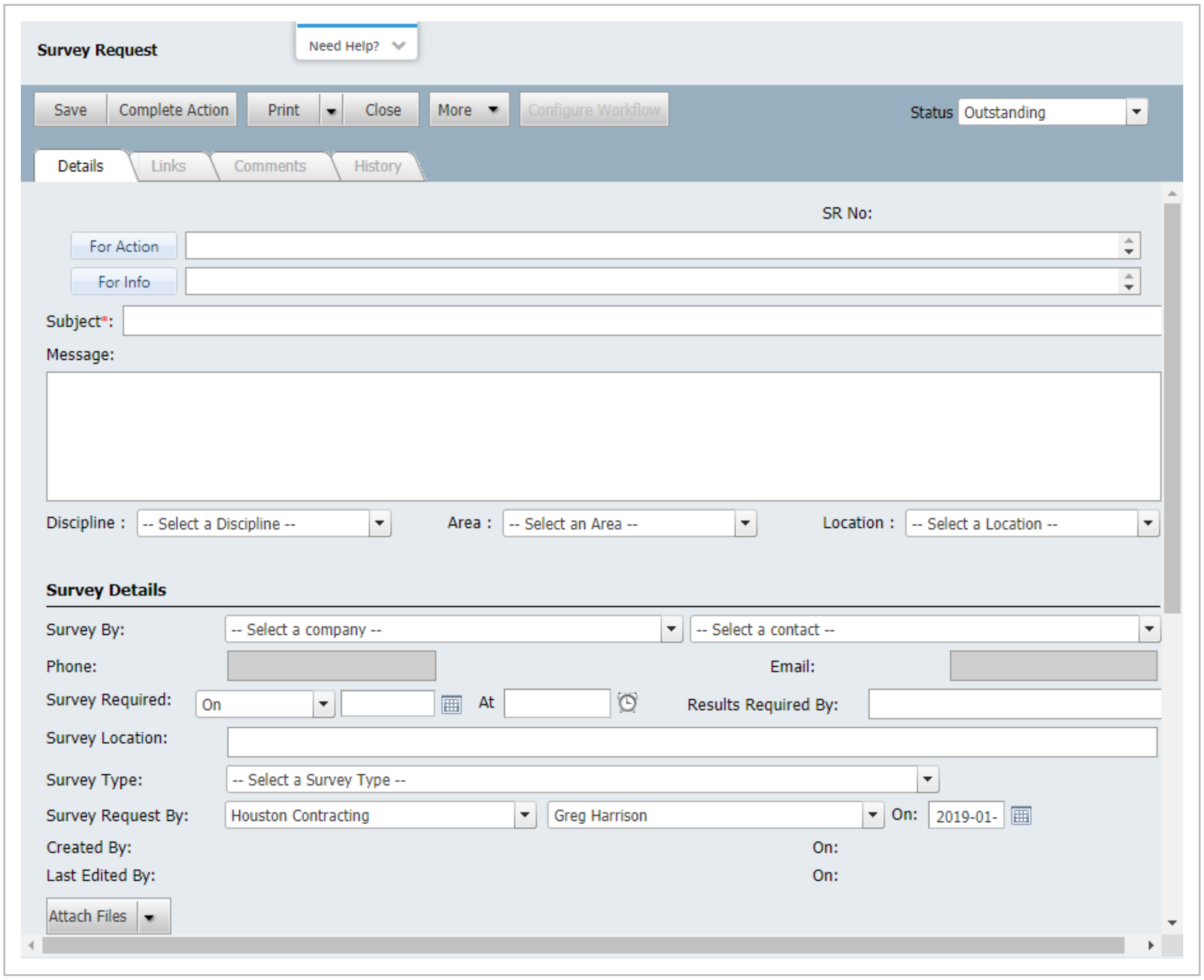
3. For the Checklist line items Response Type, select **TeamBinder Action** in the dropdown. Then click **Publish**.



4. When users complete that section of the Checklist, they will now be able to select the appropriate Form.



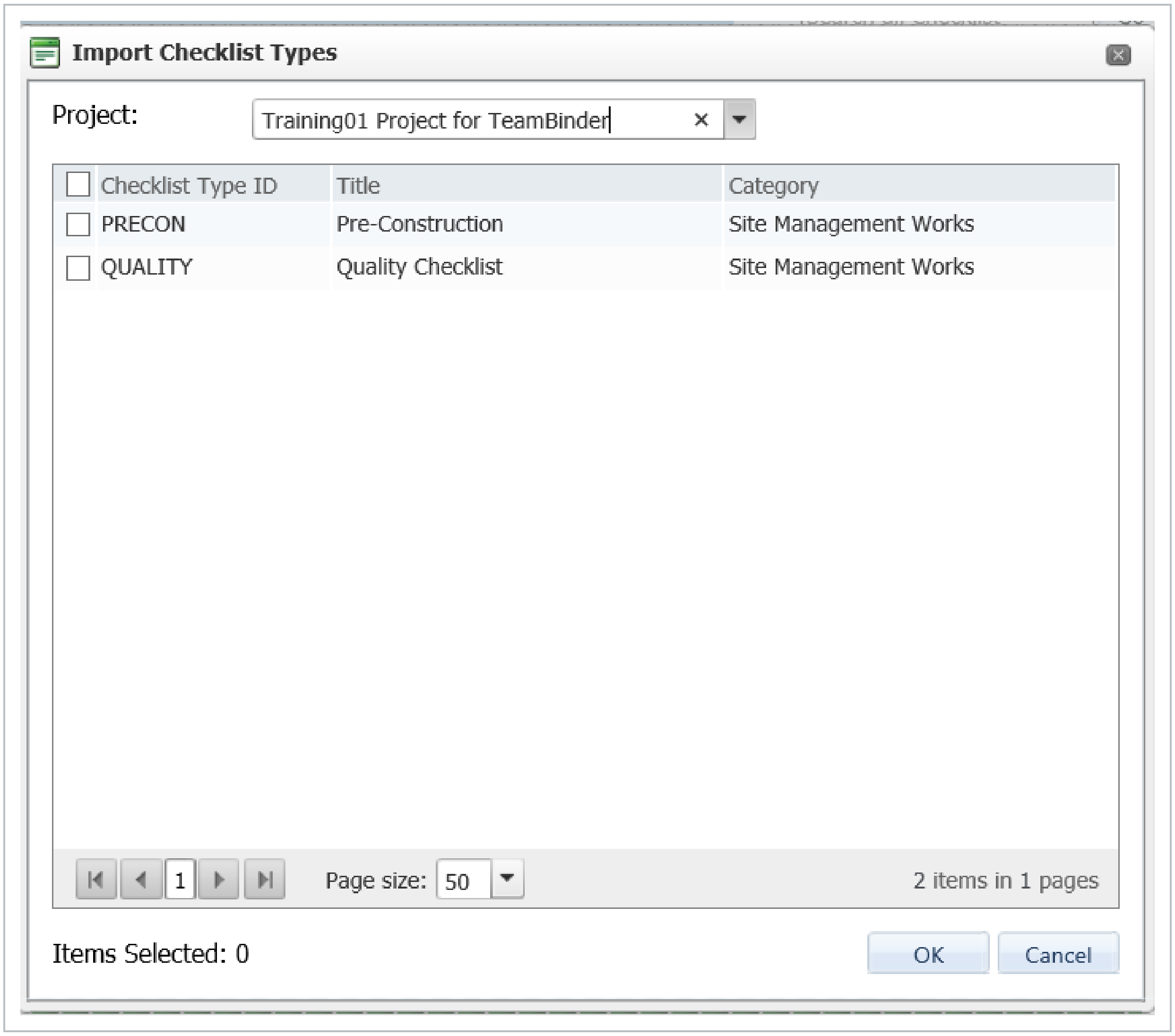
5. The Form is created while the Checklist is in progress. Once the form is Saved the hyperlink to the form is stored on the checklist.



4.4 IMPORTING CHECKLIST TYPES

To import a Checklist type from another project:

1. In the **Checklist register**, click **More** then **Import Checklist Types**.
2. From the Project dropdown select the Project the checklist was created in.



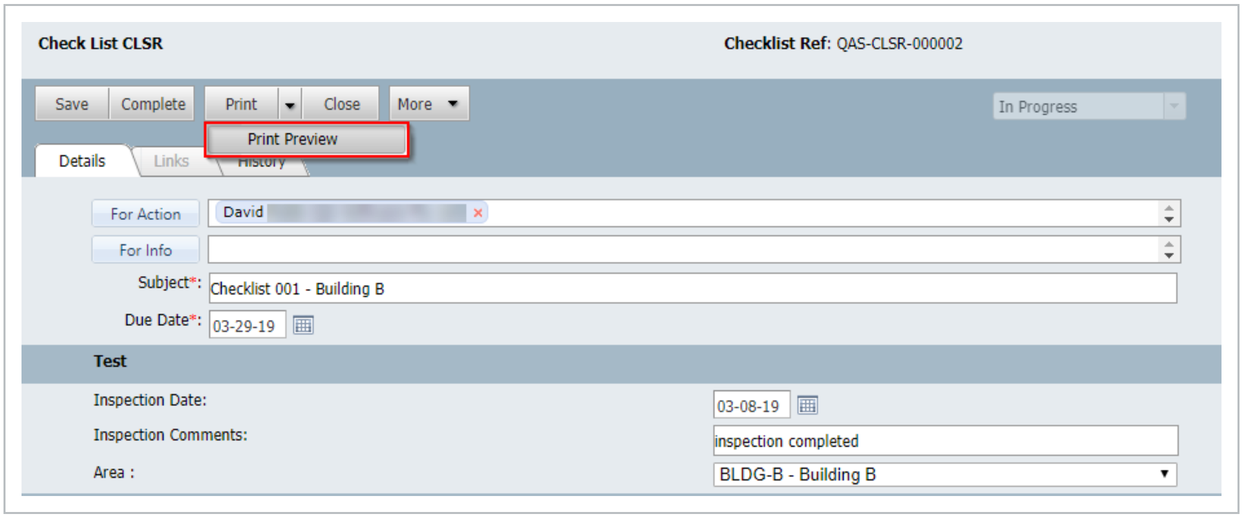
3. Select the Checklist Type IDs you want to import, then **OK.**

NOTE

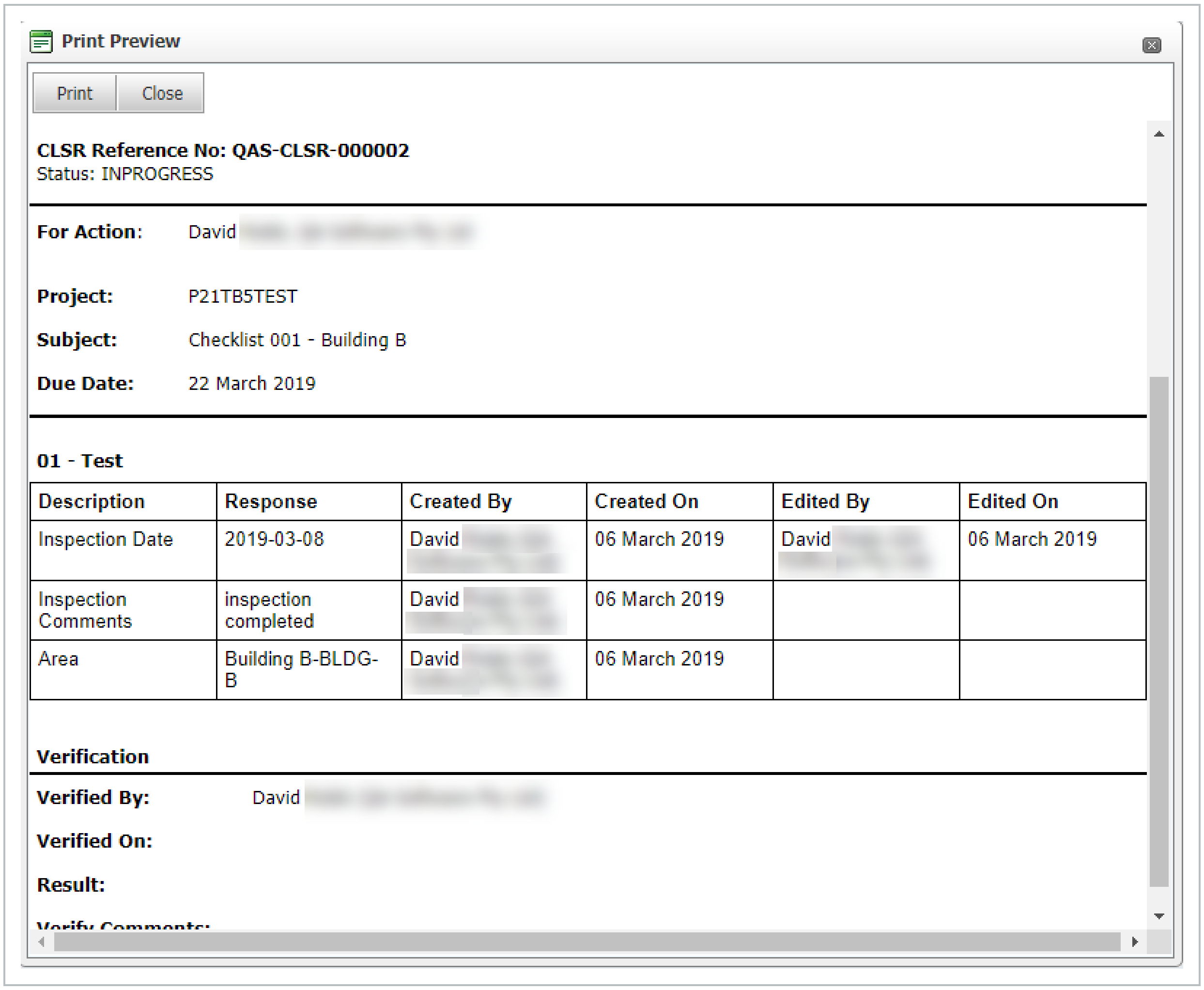
- Imported Checklist types by default are not published.
- Projects listed are ones added to your profile.
- You must have Company security level to see the checklists to import.

4.5 CHECKLIST HISTORY PRINT TEMPLATE

1. Select **Print Preview** from the **Print** dropdown menu.



2. The History template appears and is ready to be printed.



CHAPTER 5 – USER SECURITY

In InEight Document, Checklist access can be managed at a User level, by Security Group and then also by Checklist Type.

5.1 INDIVIDUAL USER LEVEL ACCESS

There are four levels of Checklist access available.

None: User have no access to the Checklist module.

Personal: Users can only access Checklists that they have personally created or been nominated in the For Action/For Info fields.

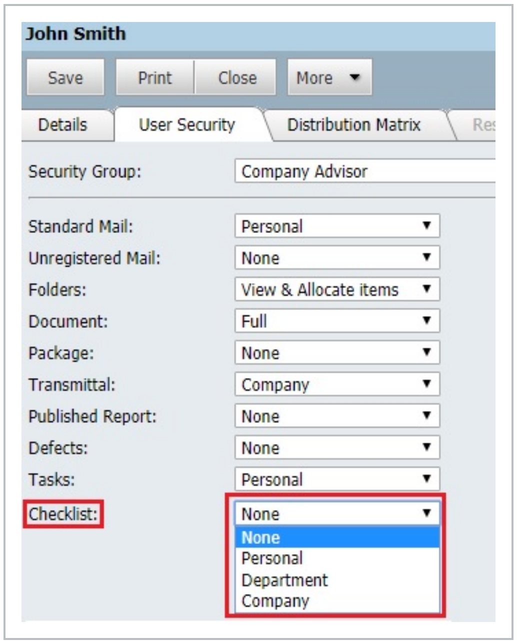
Department: Along with the Personal access rights, users can access Checklists where another user from the same Department (of the same Company) has personally created or been listed in the For Action/For Info fields.

Company: Along with the Department access rights, users can access Checklists where another user from the same Company has personally created or been listed in the For Action/For Info fields.

To provide a user with access at an individual level:

1. Click **Contacts** from the InEight Document Dashboard and locate the required contact. Then double click to open the User’s details.
2. Click on the **Security** Tab.

3. Select the Checklist Module drop down and choose the appropriate level of access.



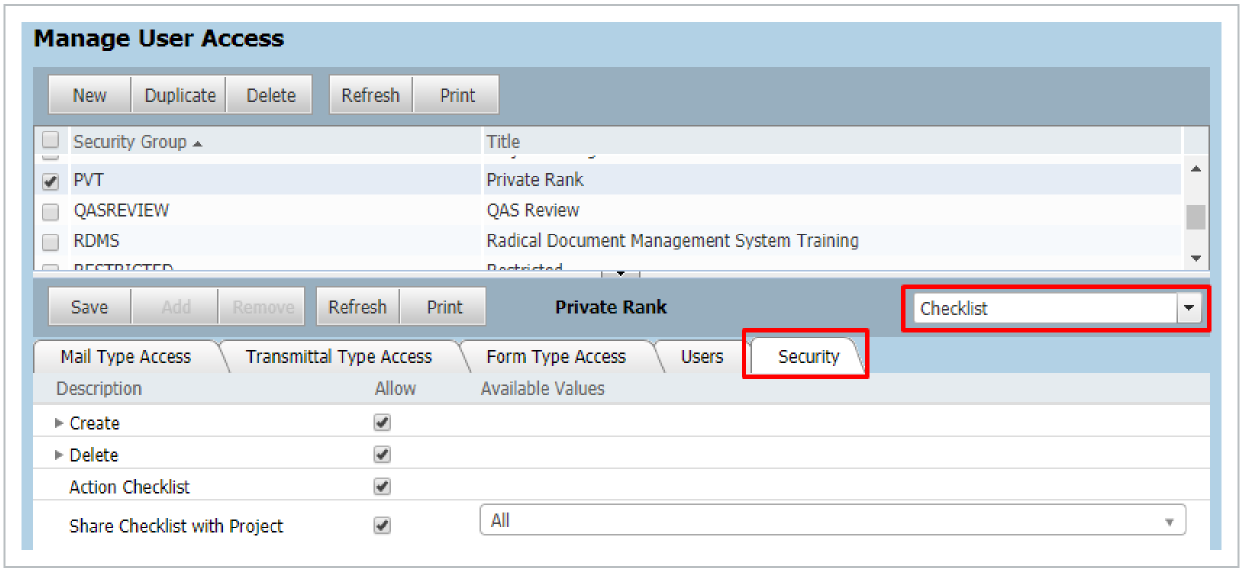
NOTE User Checklist Access can also be defined from the **User** tab within Security Group Settings.

5.2 SECURITY GROUP LEVEL ACCESS

For users with access to Checklists, additional access options can be managed via the Security Group they belong to.

1. From the InEight Document Dashboard, click the **Admin** button, then **Manage User Access** and then choose the relevant Security Group.
2. Click on the **Security** Tab then choose **Checklist** from the drop down list on the right hand side of

the window.



From here, controls can be chosen to define the actions and available values that can be used by those assigned to the Security Group.

This includes:

1. Create or delete Checklists.
2. Action Checklists

NOTE	The Checklist creator can update the For Action/Info,

5.3 CHECKLIST ACCESS

In InEight Document, Checklist access can be managed at a User level, by Security Group and then also by Checklist Type.

5.3.1 Individual User Level Access

There are four levels of Checklist access available.

None: User have no access to the Checklist module.

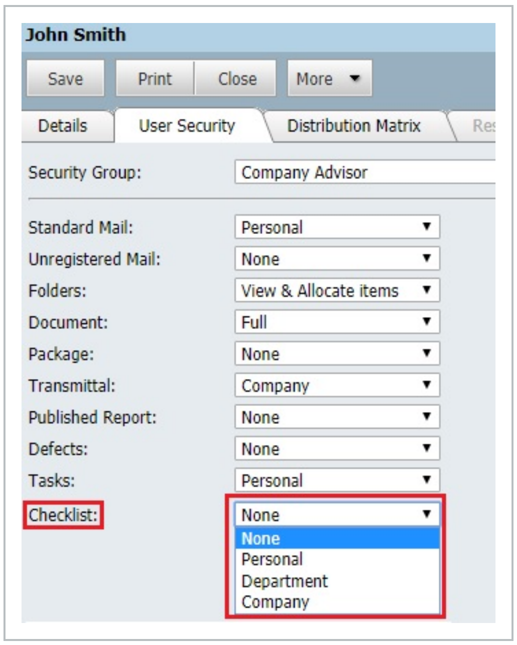
Personal: Users can only access Checklists that they have personally created or been nominated in the For Action/For Info fields.

Department: Along with the Personal access rights, users can access Checklists where another user from the same Department (of the same Company) has personally created or been listed in the For Action/For Info fields.

Company: Along with the Department access rights, users can access Checklists where another user from the same Company has personally created or been listed in the For Action/For Info fields.

To provide a user with access at an individual level:

1. Click **Contacts** from the InEight Document Dashboard and locate the required contact. Then double click to open the User's details.
2. Click on the **Security** Tab.
3. Select the Checklist Module drop down and choose the appropriate level of access.



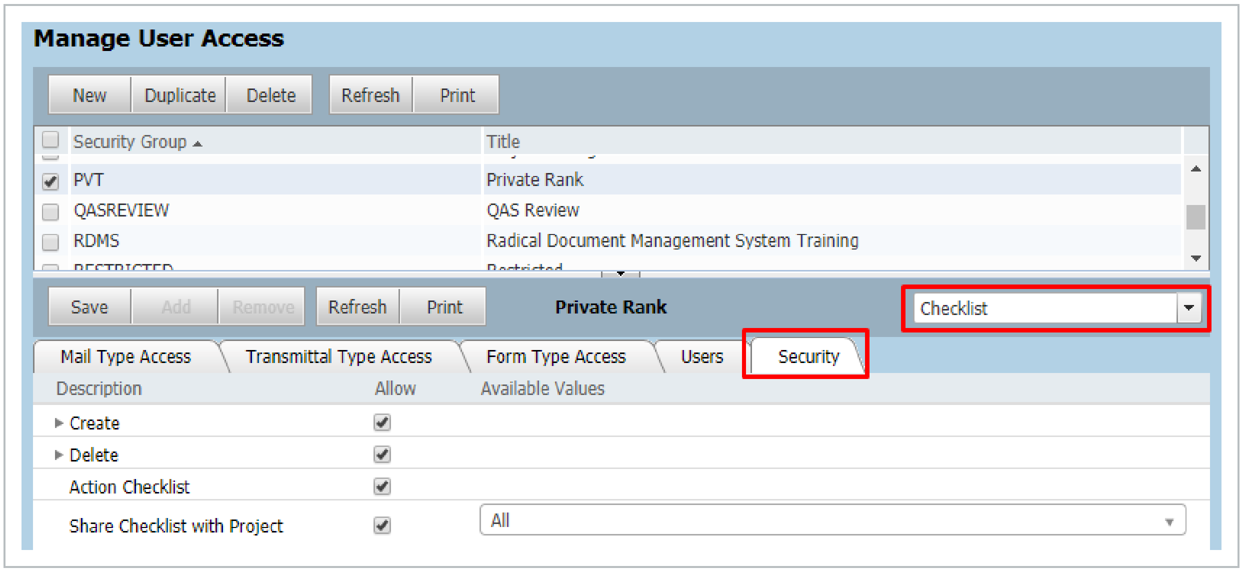
NOTE User Checklist Access can also be defined from the **User** tab within Security Group Settings.

5.3.2 Security Group Level Access

For users with access to Checklists, additional access options can be managed via the Security Group they belong to.

1. From the InEight Document Dashboard, click the **Admin** button, then **Manage User Access** and then choose the relevant Security Group.

2. Click on the **Security** Tab then choose **Checklist** from the drop down list on the right hand side of the window.



From here, controls can be chosen to define the actions and available values that can be used by those assigned to the Security Group.

This includes:

1. Create or delete Checklists.
2. Action Checklists

NOTE The Checklist creator can update the For Action/Info, Subject and Due Date fields of an issued Checklist.