INEIGHT

CHECKLIST USER GUIDE

DOCUMENT

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CONTENTS

CHAPTER 1 – INTRODUCTION TO CHECKLISTS

For more information on checklist functions, see the links below.

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.

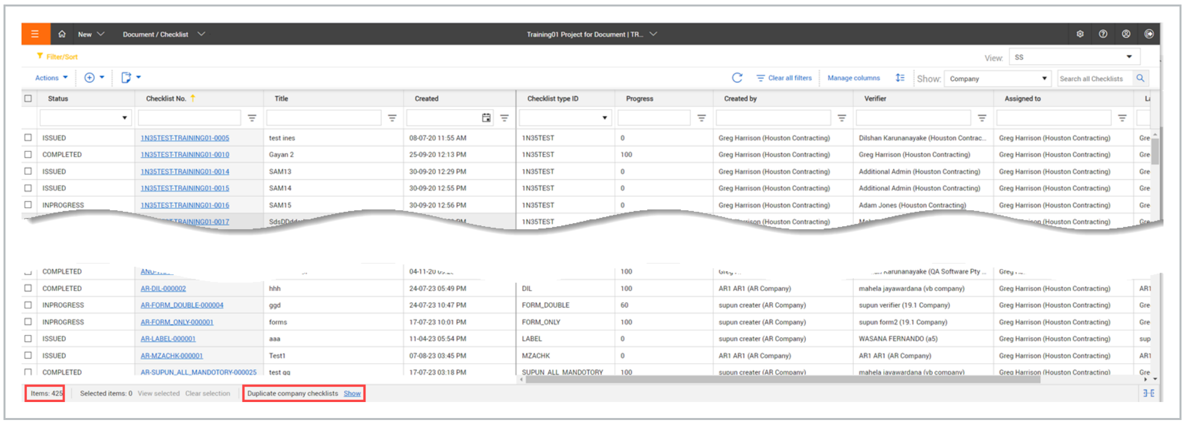
Verification: Point at which the final user is able to verify Checklist completion.

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

1.3 CHECKLIST REGISTER

The Checklist register consists of columns that describe the details of each checklist.

When there are multiple recipients from the same company for a checklist, the register might include an entry for each checklist. To hide duplicate checklists, click **Hide Duplicate company checklists** located at the bottom of the page. The view changes to show only one entry per checklist and is reflected in the Items total. To show all entries, click **Show Duplicate company checklists**.



You can click **Manage columns** to customize the columns shown in the register view.

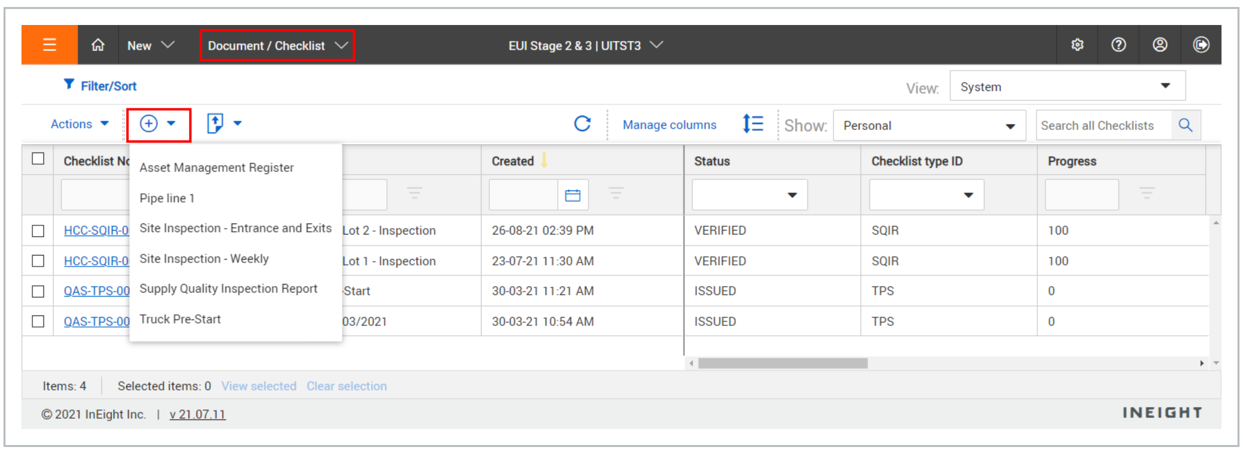
To open a checklist, click the checklist number. The checklist opens to its Details page.

CHAPTER 2 – PARTICIPATING IN A CHECKLIST

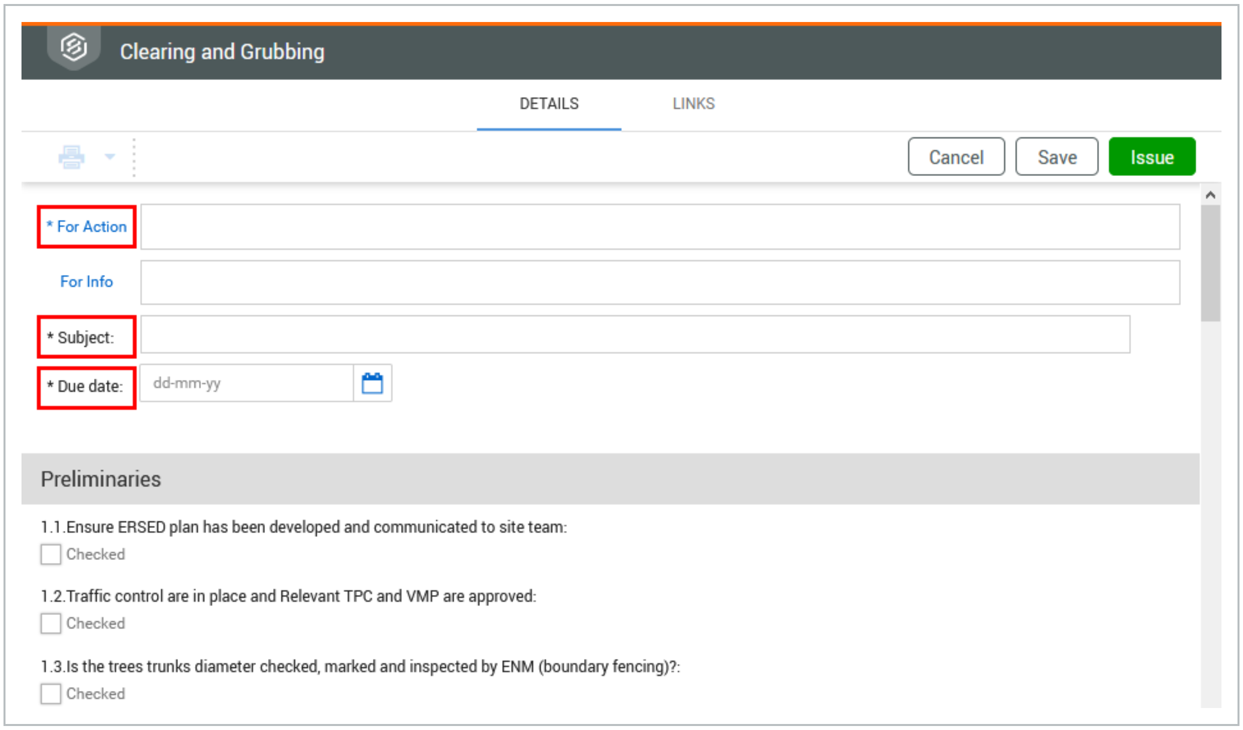
For information on Participating in a Checklist, see the links below.

2.1 STARTING A NEW CHECKLIST

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



3. Ensure that all mandatory fields are completed. This includes For Action and any field with a red asterisk.



You can enter users, groups, or roles in the For Action field.

4. In the Verification section, select whether the checklist is to be verified by a user or a role, and then complete the remaining required fields.

- If the checklist is to be verified by a user, you must select values for the Verified by company and Verified by fields.
- If the checklist is to be verified by a role, you must select a value for the Role field.

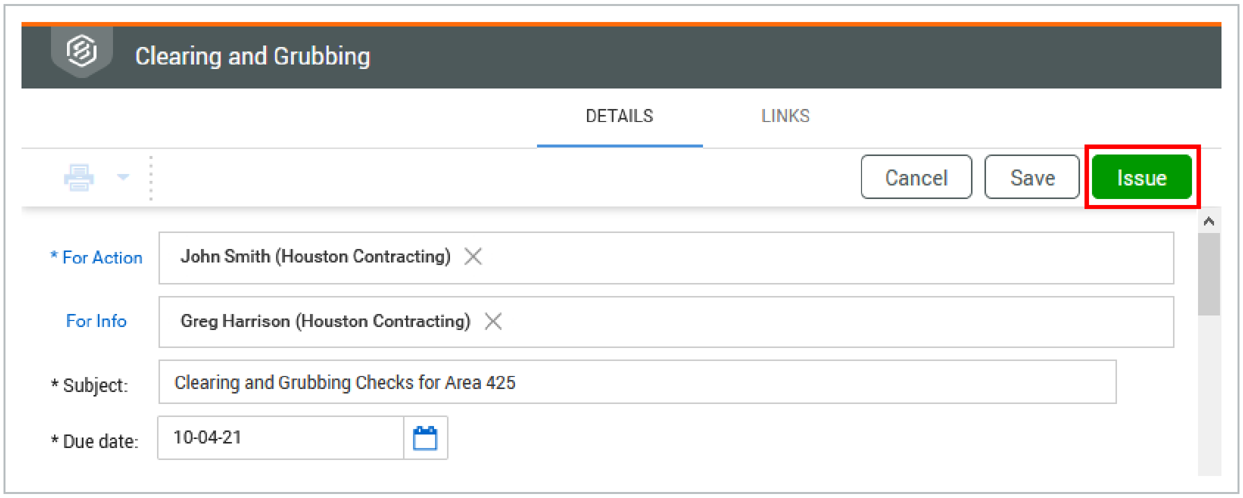
5. Click **Save** to save the checklist without issuing. It can be issued at a later date as required.

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

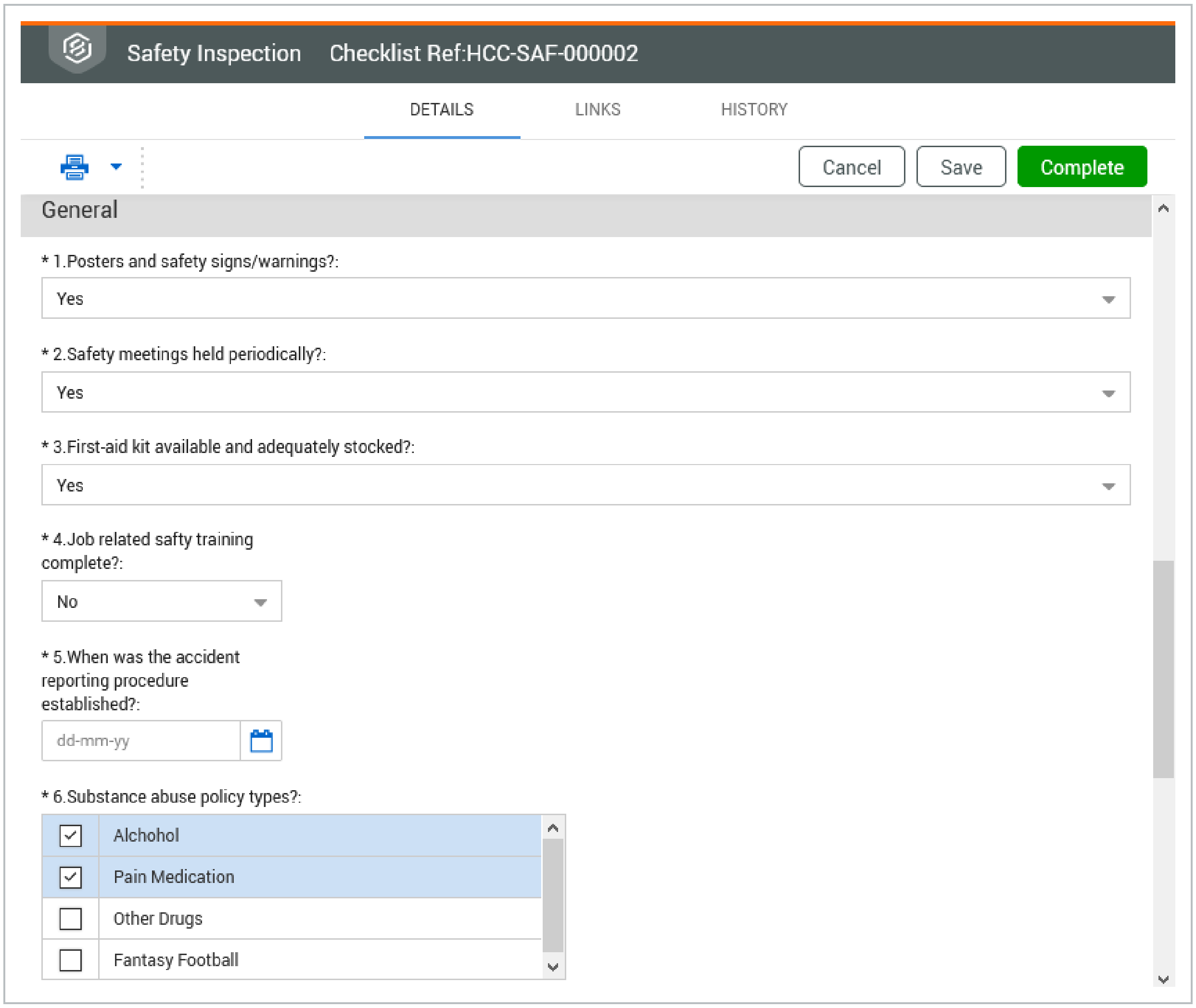
1. Locate and open the Checklist from the Checklist Register.
2. Click **Issue** in the upper right corner of the Checklist.



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

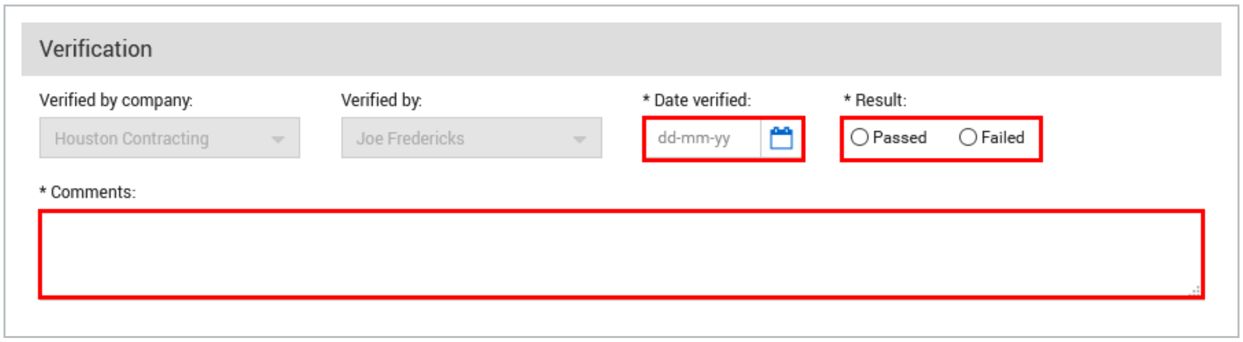
After all Checklist Sections have been completed, the Checklist will need to be checked by the Verifier, as defined when the Checklist was first issued.

VERIFY A CHECKLIST

Summary: Verify a checklist to confirm all steps have been completed.

Considerations: If corrections are needed, and you do not want the checklist to be closed, you can reactivate the checklist to return it to the users completing the checklist details.

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.
   - *Passed* closes the checklist, and it will no longer be active.
   - *Failed* fails and closes the checklist, and it will no longer be active.
4. Add any required comments.

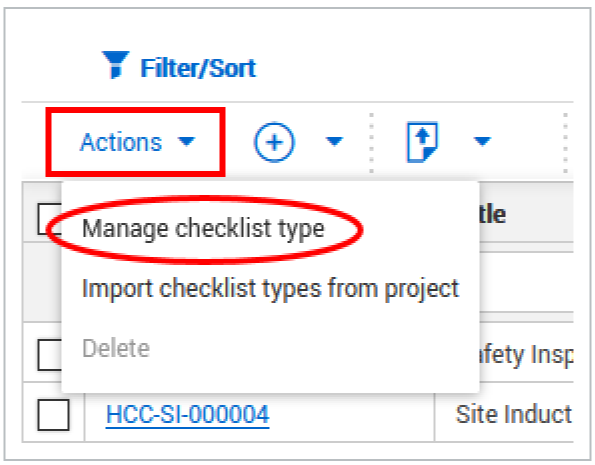
CHAPTER 3 – CHECKLIST TYPES

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

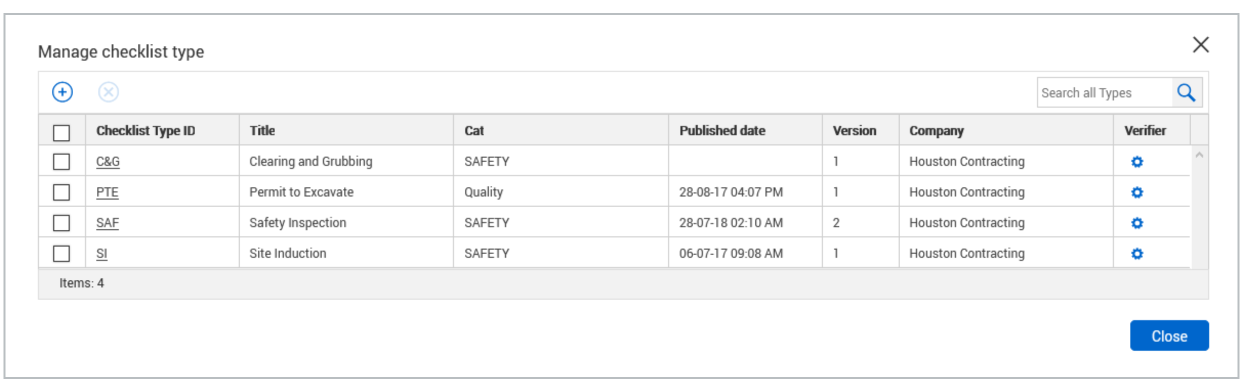
3.1 CREATING A NEW CHECKLIST TYPE

To create a new Checklist Type:

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



4. A list of existing templates will be displayed.



5. Click to create a new Checklist Type.
6. Enter a Checklist Type ID, Title and Checklist Category.
7. Checklist Type 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.
11. Specify the section name (which will appear as the header for that section) and sequence (the order in which sections appear).
12. Any number of sections can be added to a Checklist, however, within each section at least one section item must be specified.
13. 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: Lets a single line of text to be typed. You can indicate whether to use plain text or rich text.

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

Date - time: Text box in format of dd-mm-yy and date and time pickers.

Checkbox: A single checkbox to be ticked.

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

Signature: Text box used for a digital signature.

Attach File: Lets supporting files to be attached.

Text Area: Lets 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: Lets a user defined list of check boxes be available to be selected individually.

Dropdown List: Lets a drop-down list of administrator defined options to be available.

Configuration Table: Lets a drop-down list selection from an existing InEight Document Configuration Table to be available.

Address Book: Lets the selection of a company and subsequent contact to be available.

System Action: Lets Actions (Forms or Mail item) to be raised from the checklist and linked

NOTE If there are configured dependent fields, they are also supported when configuring the checklist response types.

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:

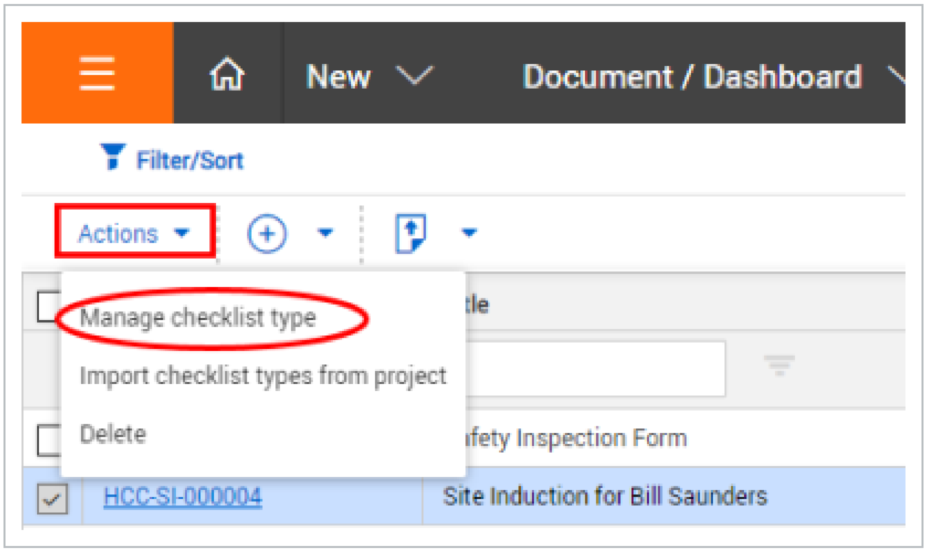
1. Locate the Checklist in the Manage Checklist Types screen.
2. Double click the Checklist and click Publish to make it available.

NOTE

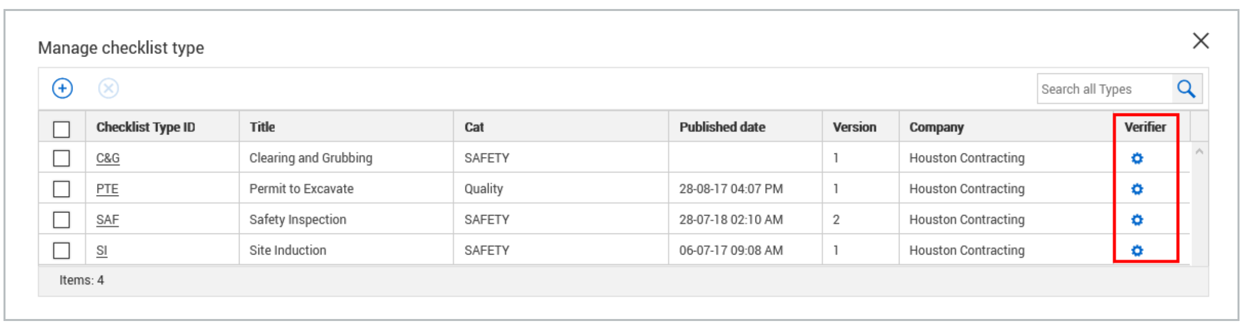
- The Input template can be viewed by clicking **Preview**.
- The Output can also be viewed on an active Checklist by clicking **Print** and **Print Preview.**

3.4 RESTRICT VERIFIERS BASED ON CHECKLIST TYPE

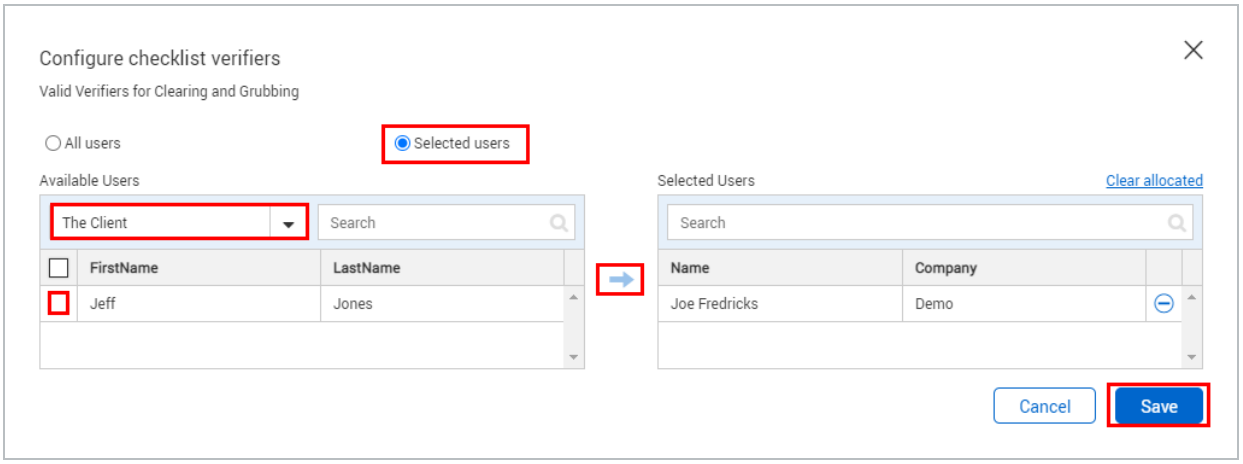
1. Select the **More** dropdown menu and click **Manage Checklist Types.**



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



3. Check **Selected users**.



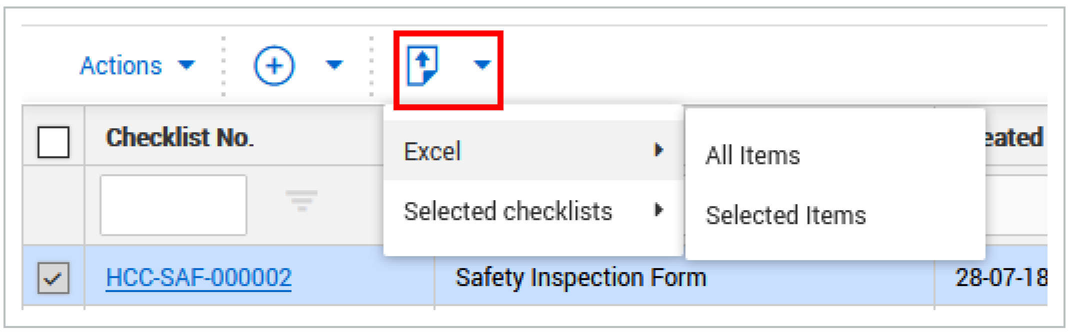
4. Select the company, then check the users to be listed as verifiers. Click the  button to add them.
5. Click **Save**.

CHAPTER 4 – ADDITIONAL CHECKLIST OPTIONS

For information on Additional Checklist Options, see the links below.

4.1 CHECKLIST EXPORT

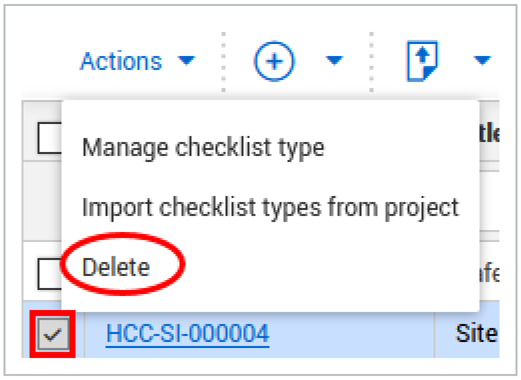
From the Checklist Register, click the  button, then select **Excel** to export All Items or Selected Items.



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 **Actions**, then **Delete**.

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

4.3 REACTIVATE A COMPLETED CHECKLIST

When a checklist has been closed out in error, you can reactivate it, so you can correctly complete checklist items.

REACTIVATE A CHECKLIST

Summary: Reactivate a checklist when a checklist if a checklist question was missed or the checklist should not have been verified.

Considerations: You must be a member of the Reactivate Checklist security group in the Checklist module security. If you have Personal security in this group, you can only reactivate your own checklist.

Quick steps:

1. From the Checklist register, select a completed checklist.
2. Expand the **Actions** menu, and then select **Reactivate checklist**. A Reactivate checklist confirmation box opens.
3. Click **Proceed**.

What's next: The checklist is set to an active state, and is returned to the For Action recipients to update the information.

4.4 TRANSFER CHECKLIST OWNERSHIP

You might need to transfer checklist ownership to another user if they need ongoing revisions to the checklist.

TRANSFER OWNERSHIP OF A CHECKLIST

Summary: Transfer the ownership of a checklist when you want another user to be responsible for the checklist.

Considerations: You must be a member of a security group that can transfer ownership of a checklist. These instructions start at the Checklist register. If you are already in a checklist, you can use the Actions menu for that checklist.

1. From the Checklist register, select a checklist, and then click the **Actions** menu.
2. Select **Transfer checklist ownership**. The Transfer Checklist Ownership dialog box opens.
3. Select the company and contact, and then click **Save**.

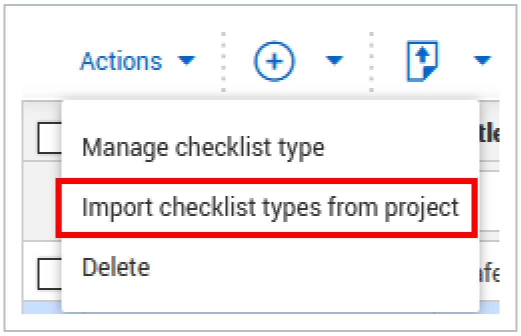
4.5 IMPORT CHECKLIST TYPES

Importing checklist lets you use checklists across different projects.

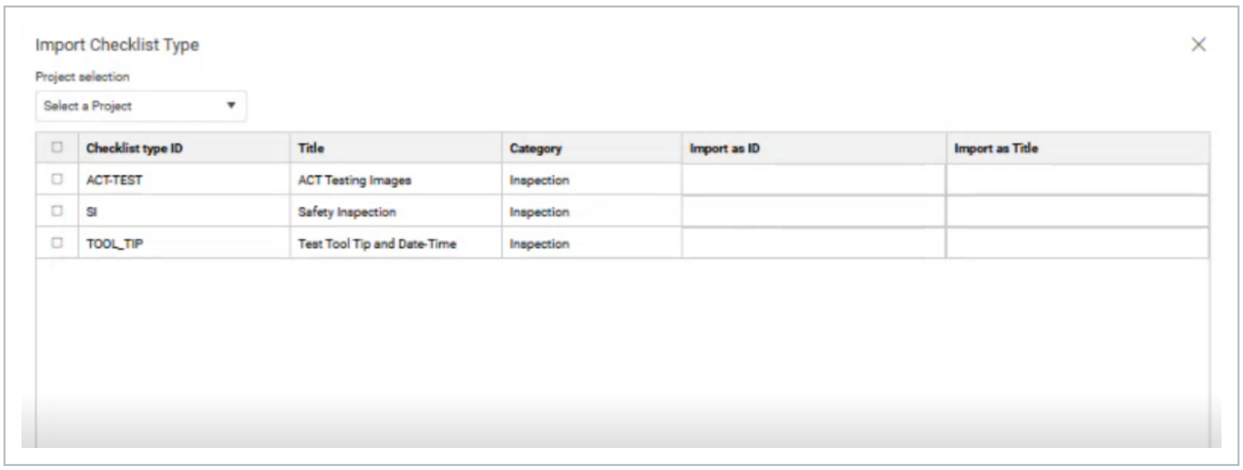
IMPORT A CHECKLIST

Summary: Import a checklist when a checklist you want to use already exists in another project, so you do not have to recreate it.

1. In the Checklist register, click **Actions**, and then select **Import checklist types from project**.



2. From the Project drop-down menu, select the project the checklist was created in.



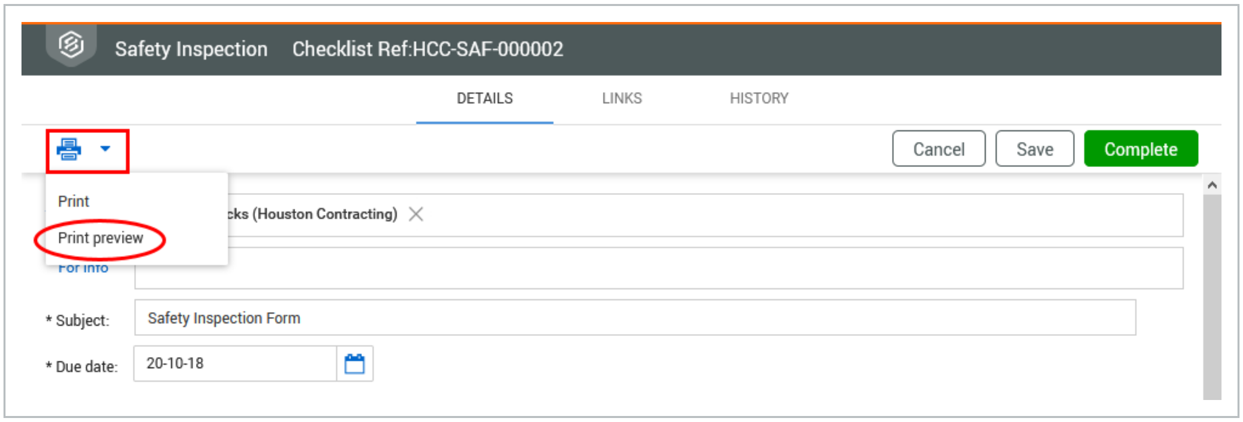
3. Select the Checklist Type IDs you want to import.
4. Optionally enter the ID and title that you want to use in the import in the Import as ID and Import as Title fields, respectively. If the fields are blank, Document uses the original ID or title.
5. Click **Import**.

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.

4.6 CHECKLIST HISTORY PRINT TEMPLATE

1. Select **Print Preview** from the **Print** drop-down menu.



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

5.1 CHECKLIST SECURITY

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

5.1.1 INDIVIDUAL USER LEVEL ACCESS

There are four levels of Checklist access available.

None: User have no access to the Checklist module.

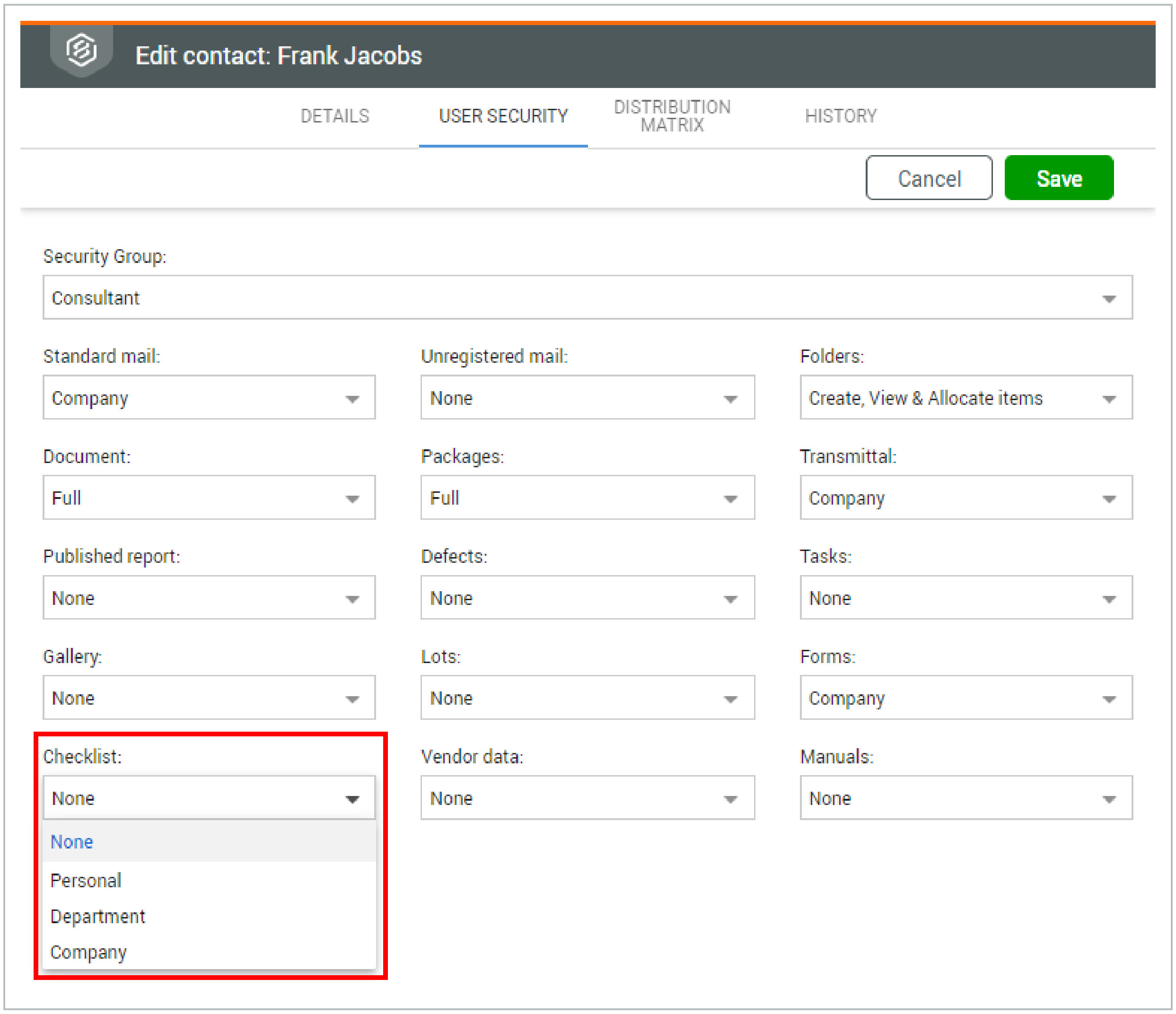
Personal: Users can only access Checklists that they have personally created or been nominated in the For Action/For Info fields.

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 **User Security** Tab.
3. Select the Checklist Module drop down and choose the appropriate level of access.

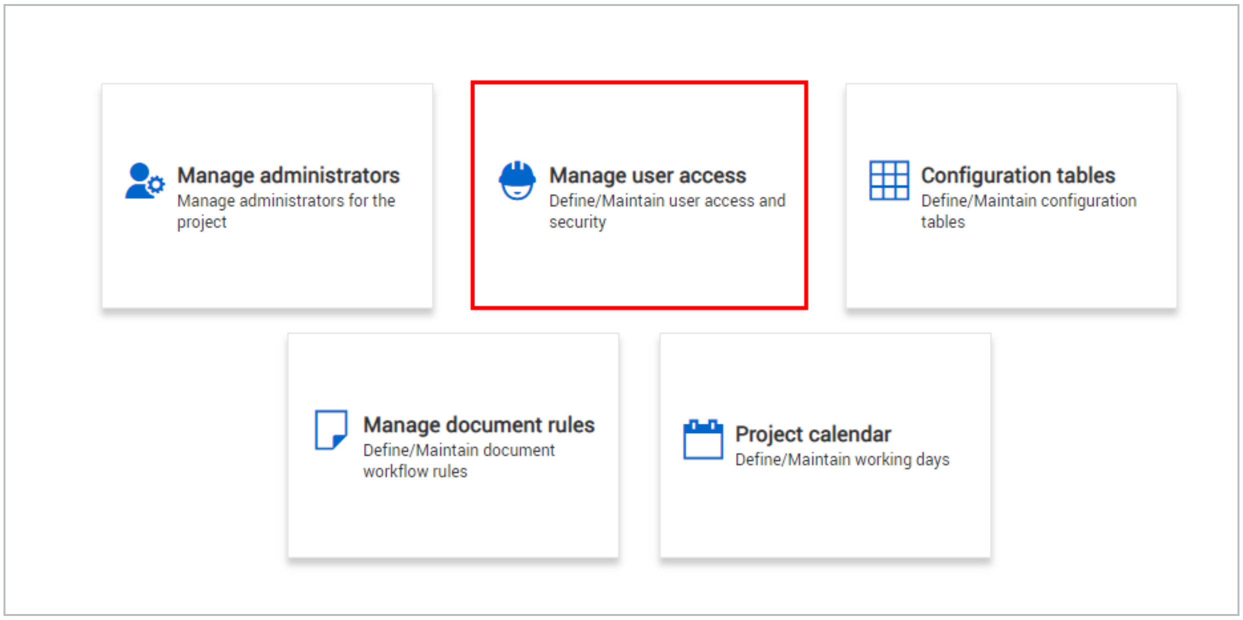


NOTE User Checklist Access can also be defined from the **User** tab within Security Group Settings.

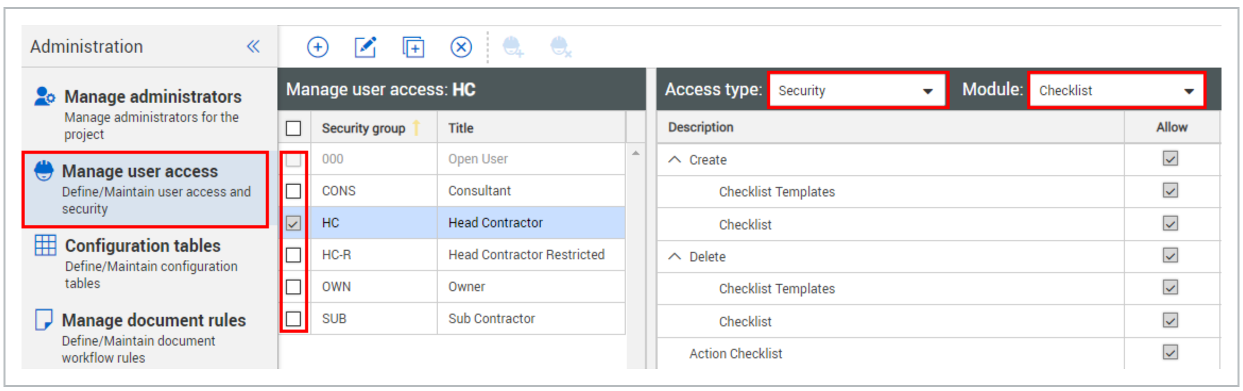
5.1.2 SECURITY GROUP LEVEL ACCESS

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.