INEIGHT

CHECKLIST DOCUMENT TYPE

DOCUMENT

Release 25.9
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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.

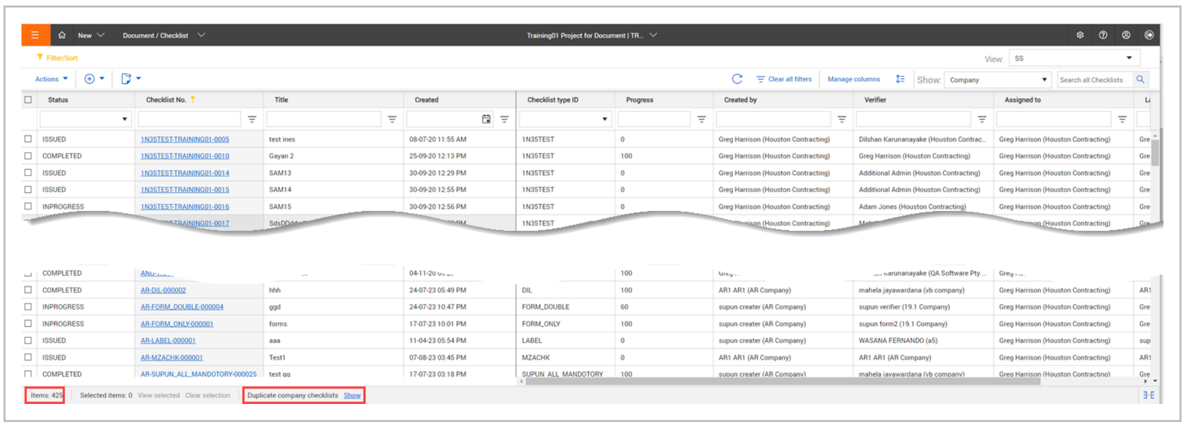
Verification: Point at which the final user is able to verify Checklist completion.

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.

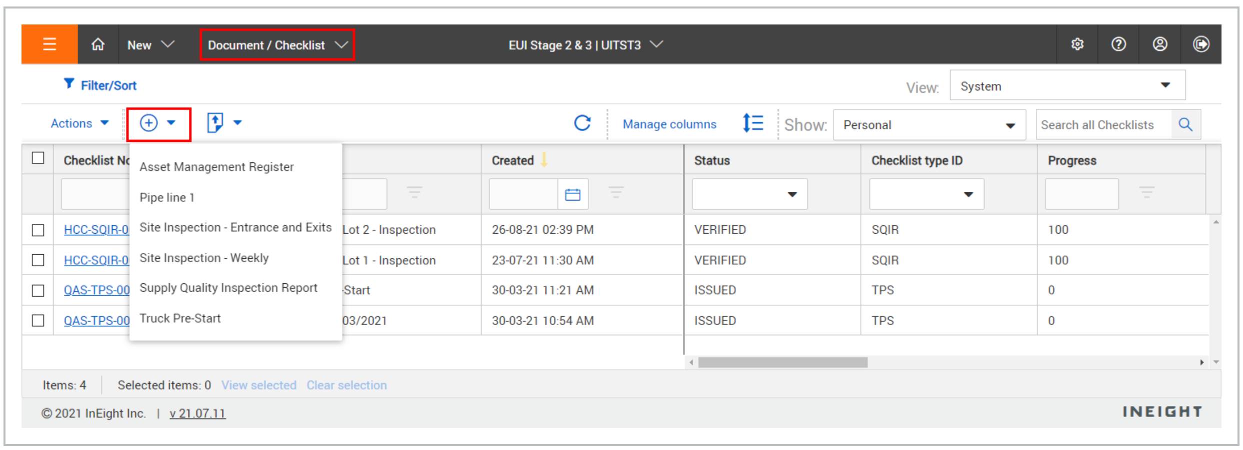
To open a checklist, click the checklist number. The checklist opens to its Details page.

CHAPTER 2 – PARTICIPATING IN A CHECKLIST

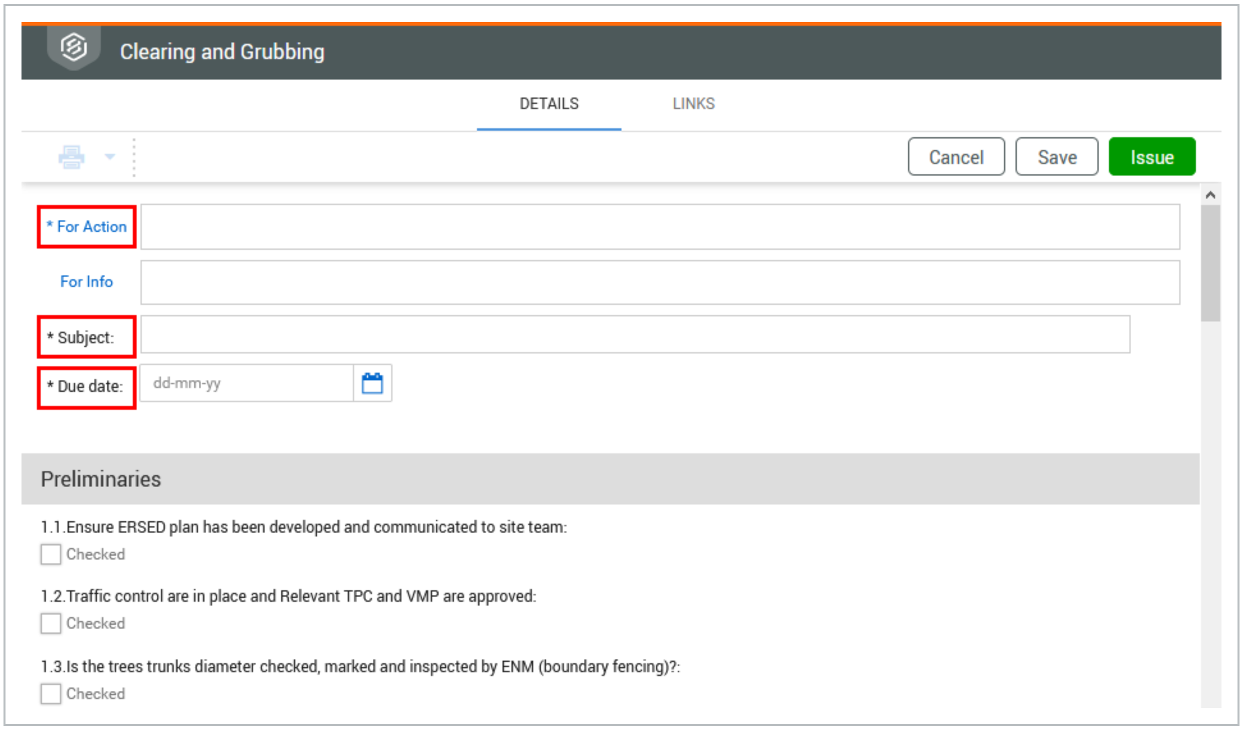
For information on Participating in a Checklist, see the links below.

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.

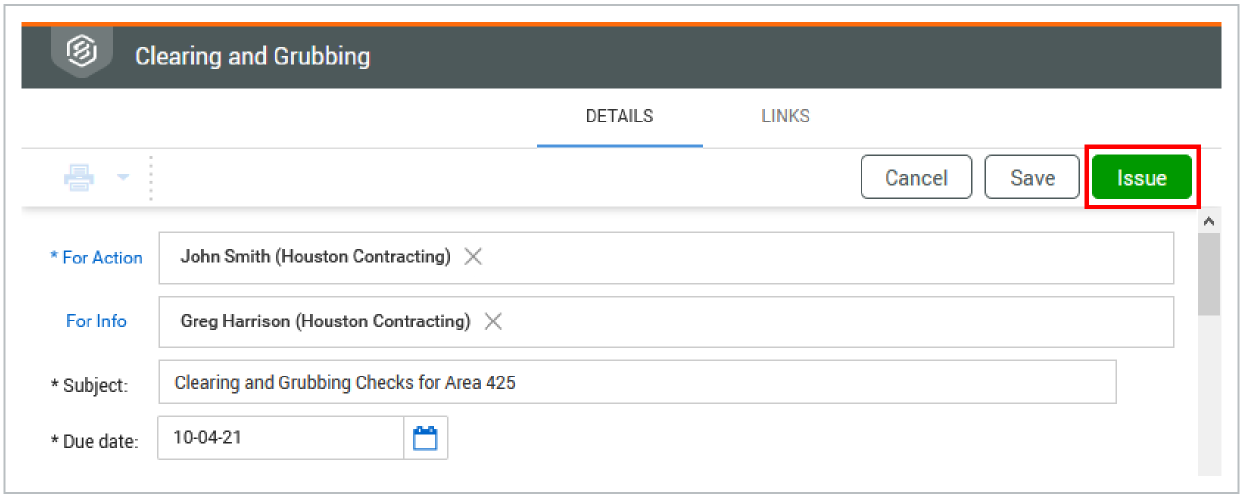
5. Click **Save** to save the checklist without issuing. It can be issued at a later date as required.

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

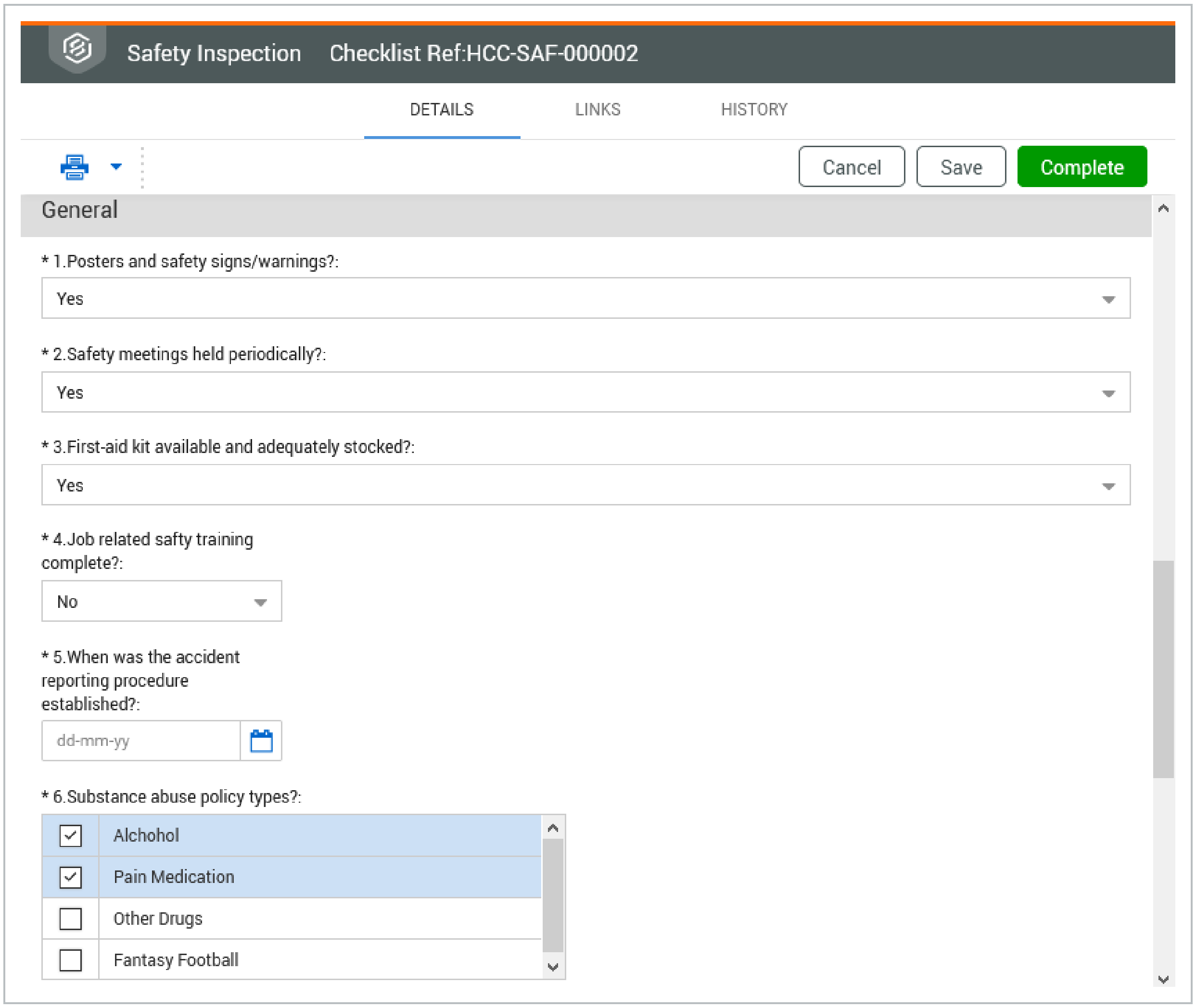
1. Locate and open the Checklist from the Checklist Register.
2. Click **Issue** in the upper right corner of the Checklist.



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

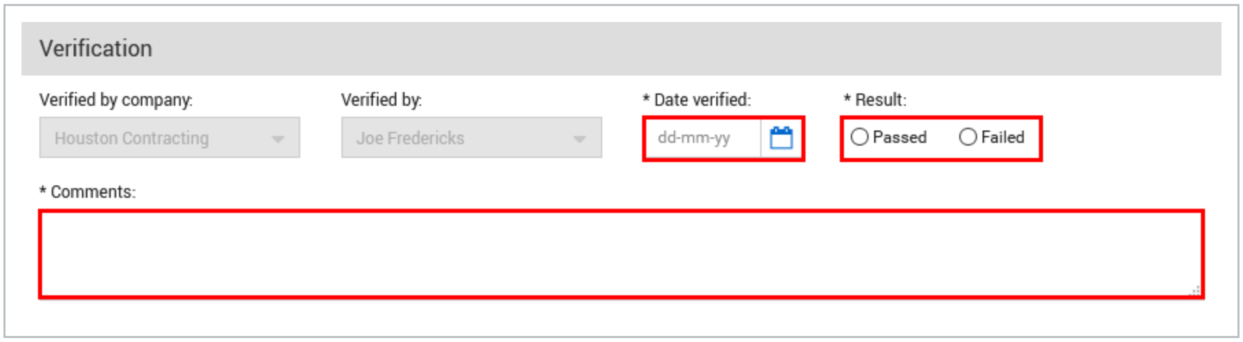
After all Checklist Sections have been completed, the Checklist will need to be checked by the Verifier, as defined when the Checklist was first issued.

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

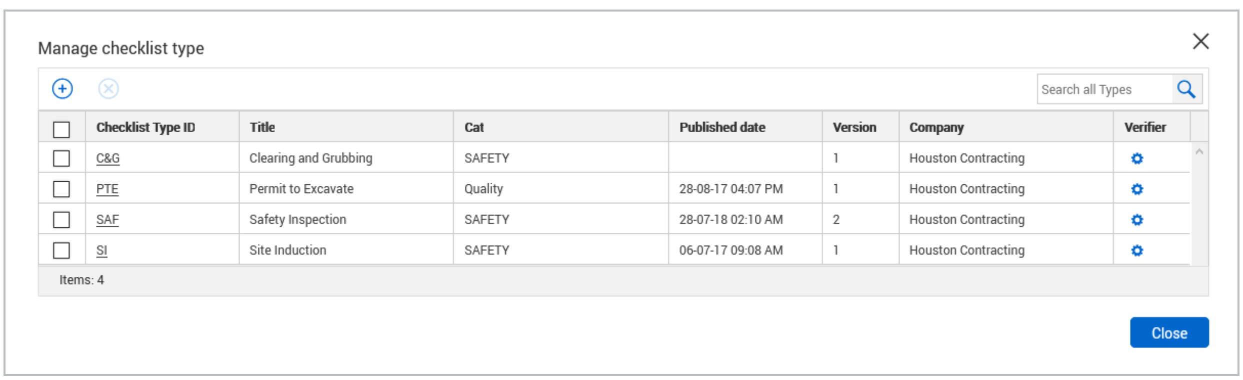
A checklist type is like a template that lets you quickly create new checklists with predefined sections and question types.

CREATE A NEW CHECKLIST TYPE

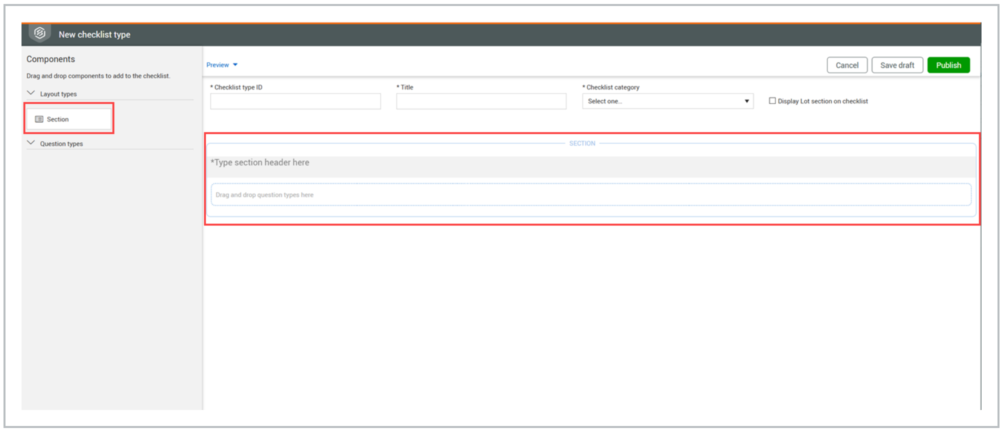
Summary: Create a new checklist type, so you can have a template to re-create checklists with similar items.

Considerations: You can click **Save draft** at any time to save your work.

1. From the Checklist module, expand the **Actions** menu, and then select **Manage Checklist Types**. A list of existing checklist types shows.



2. Click the **Add** icon to create a new checklist type. The Checklist builder opens.



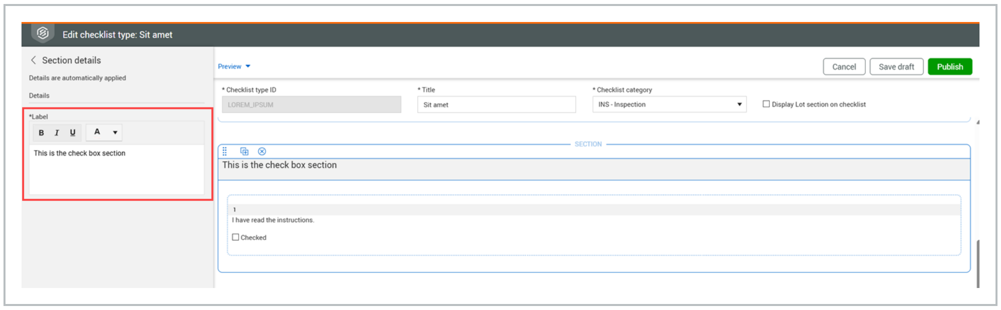
3. Enter a Checklist type ID, Title and Checklist category.

   The Checklist Type ID is an abbreviation of the title and shows in the Checklist reference number.

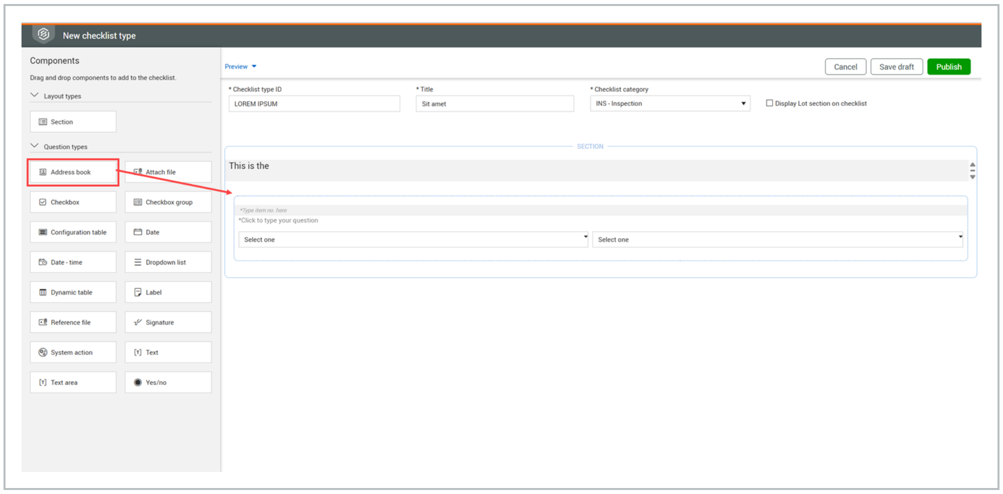
   The Title is the name of the checklist and should give a clear indication of what the Checklist will be used for.

   The Checklist category provides a classification for numerous checklists, for example, Safety, Earthworks, Site Inductions.

4. In the Section box, specify the section name, which will show as the header for that section. The section name can have multiple lines. You can optionally use the formatting tools in the Label section of the Section details panel to format the section name.



5. Click the arrow at the top of the Section details panel to go to the Components panel.
6. Drag and drop a question type in the designated box in the section.



7. Enter the item number of the question.
8. Click the field below, and then enter the question text. You can use the tools in the Field details panel to format the question text.
9. If you want the question to be required, select the **Required** check box.
10. If you want to add additional sections to the checklist, click the arrow at the top of the Field details panel to return to the Components panel, and then drag and drop the **Section** layout type into the checklist. Any number of sections can be added to a checklist. At least one section item must be specified in each section.
11. Repeat steps 4-9 for each section you add. If you want to change the order of the sections, click the **Move** icon in the section, and then drag and drop to the new position.

> NOTE The item numbers are not validated or reordered. If you change the order of steps, you must manually change the item numbers of all affected sections.

12. Click **Publish** to save and publish the checklist.

3.2 ADDING ITEMS TO A SECTION

Each section consists of a section type and a question type. You must also add the item number and question type.

3.2.0.1 Question Types

The following Checklist question types are available:

Question type	Description
Address Book	Lets the selection of a company and subsequent contact to be available.
Attach File	Lets supporting files be attached.
Checkbox	A single checkbox be selected.
Checkbox Group	Lets a user defined list of check boxes be available to be selected individually.
Configuration Table	Lets a drop-down list selection from an existing InEight Document Configuration Table to be available.
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.
Dropdown List	Lets a drop-down list of administrator-defined options to be available.
Dynamic table	Lets a dynamic table to be available.
Label	Free text used to provide information that does not require a direct response.
Reference file	Lets a predefined attachment, such as a template, be available in the checklist. The file is available for download when completing the checklist.
Signature	Text box used for a digital signature.
System Action	Lets Actions (Forms or Mail item) be raised from the checklist and linked. After you add the System Action question type, you can specify the module, and then the action, such as All, Create New, or Link Existing. When you select Link Existing, a link, also called Link Existing, shows in the checklist. The checklist user can then click the link to view the list of existing items.
Text	Lets a single line of text to be typed. You can indicate whether to use plain text or rich text.
Text Area	Lets multiple lines of free text be typed.
Yes/No	A drop-down box with the option to select *Yes*, *No*, or *N/A*.

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:

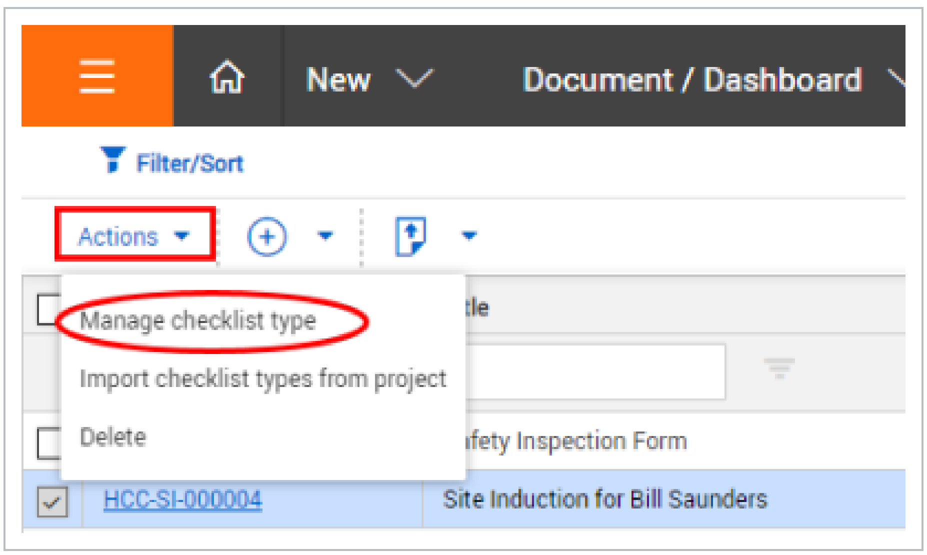
1. Locate the Checklist in the Manage Checklist Types screen.
2. Double click the Checklist and click Publish to make it available.

NOTE

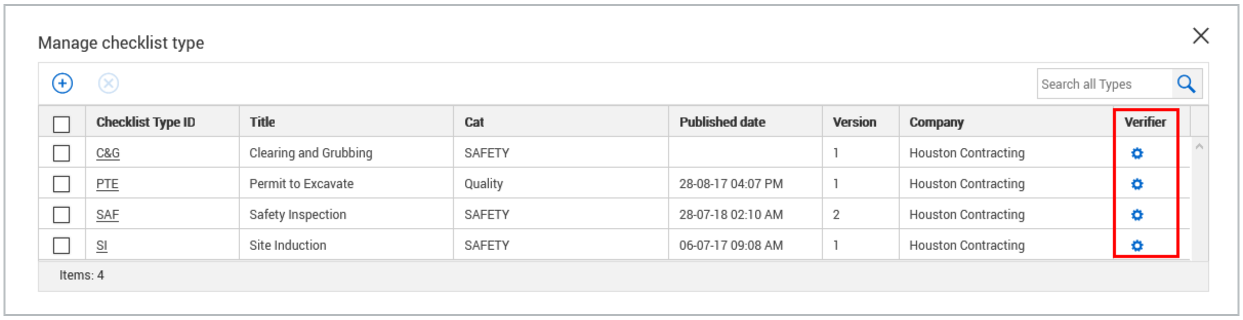
- The Input template can be viewed by clicking **Preview**.
- The Output can also be viewed on an active Checklist by clicking **Print** and **Print Preview.**

3.4 RESTRICT VERIFIERS BASED ON CHECKLIST TYPE

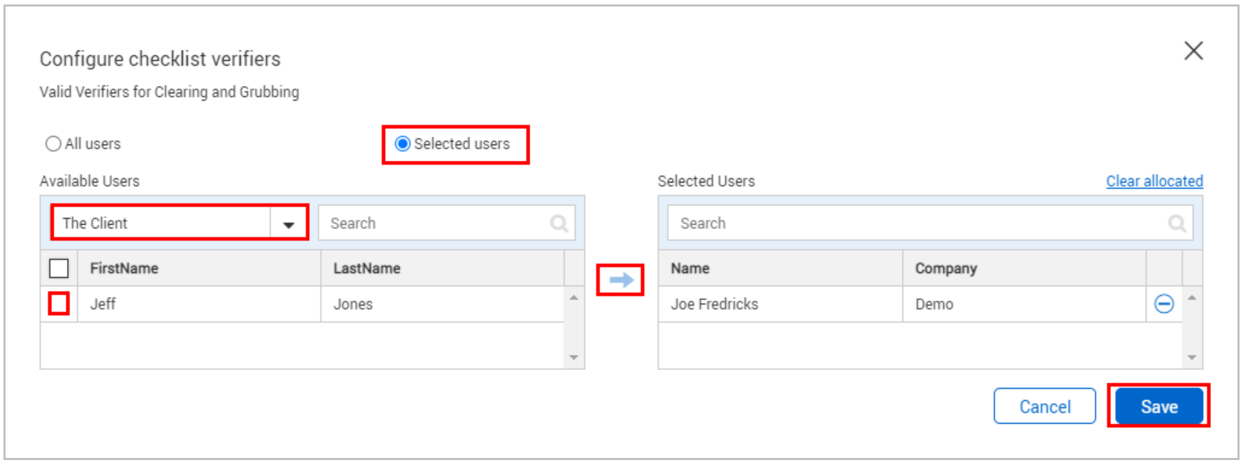
1. Select the **More** dropdown menu and click **Manage Checklist Types.**



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



3. Check **Selected users**.

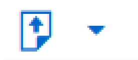


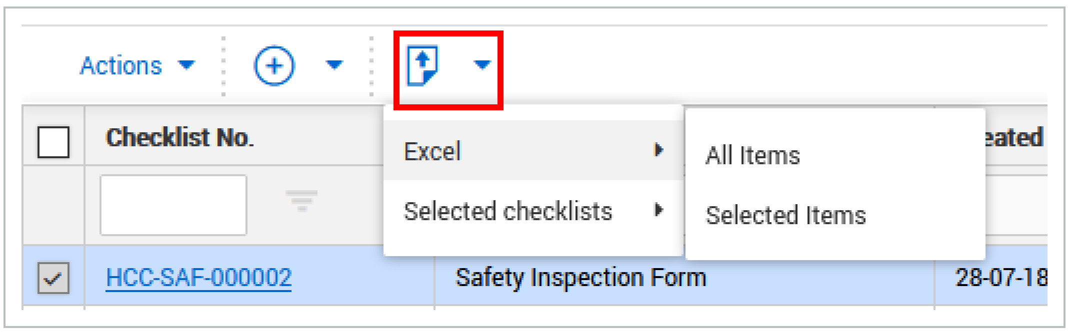
4. Select the company, then check the users to be listed as verifiers. Click the button to add them.
5. Click **Save**.

CHAPTER 4 – ADDITIONAL CHECKLIST OPTIONS

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

4.1 CHECKLIST EXPORT

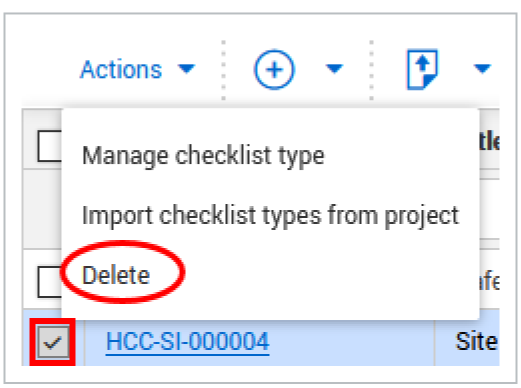
From the Checklist Register, click the  button, then select **Excel** to export All Items or Selected Items.



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**.

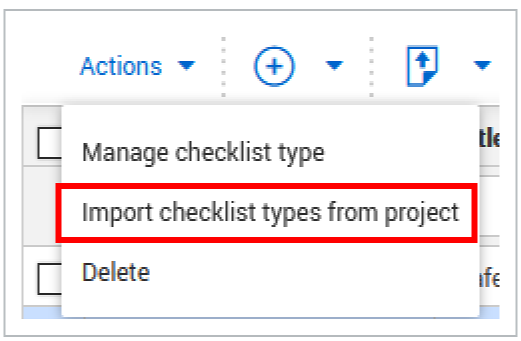
4.5 IMPORT CHECKLIST TYPES

Importing checklist lets you use checklists across different projects.

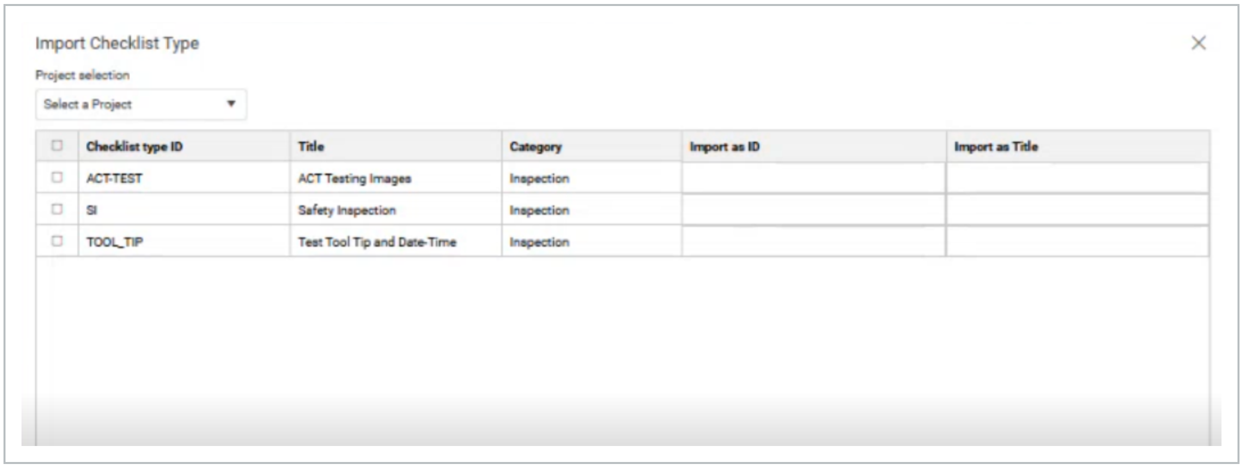
IMPORT A CHECKLIST

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.



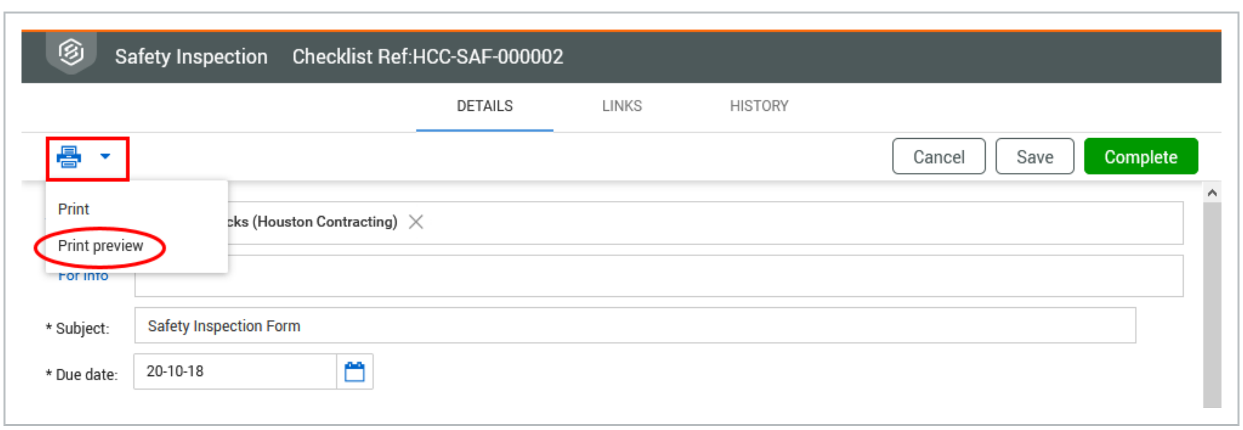
3. Select the Checklist Type IDs you want to import.
4. Optionally enter the ID and title that you want to use in the import in the Import as ID and Import as Title fields, respectively. If the fields are blank, Document uses the original ID or title.
5. Click **Import**.

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.

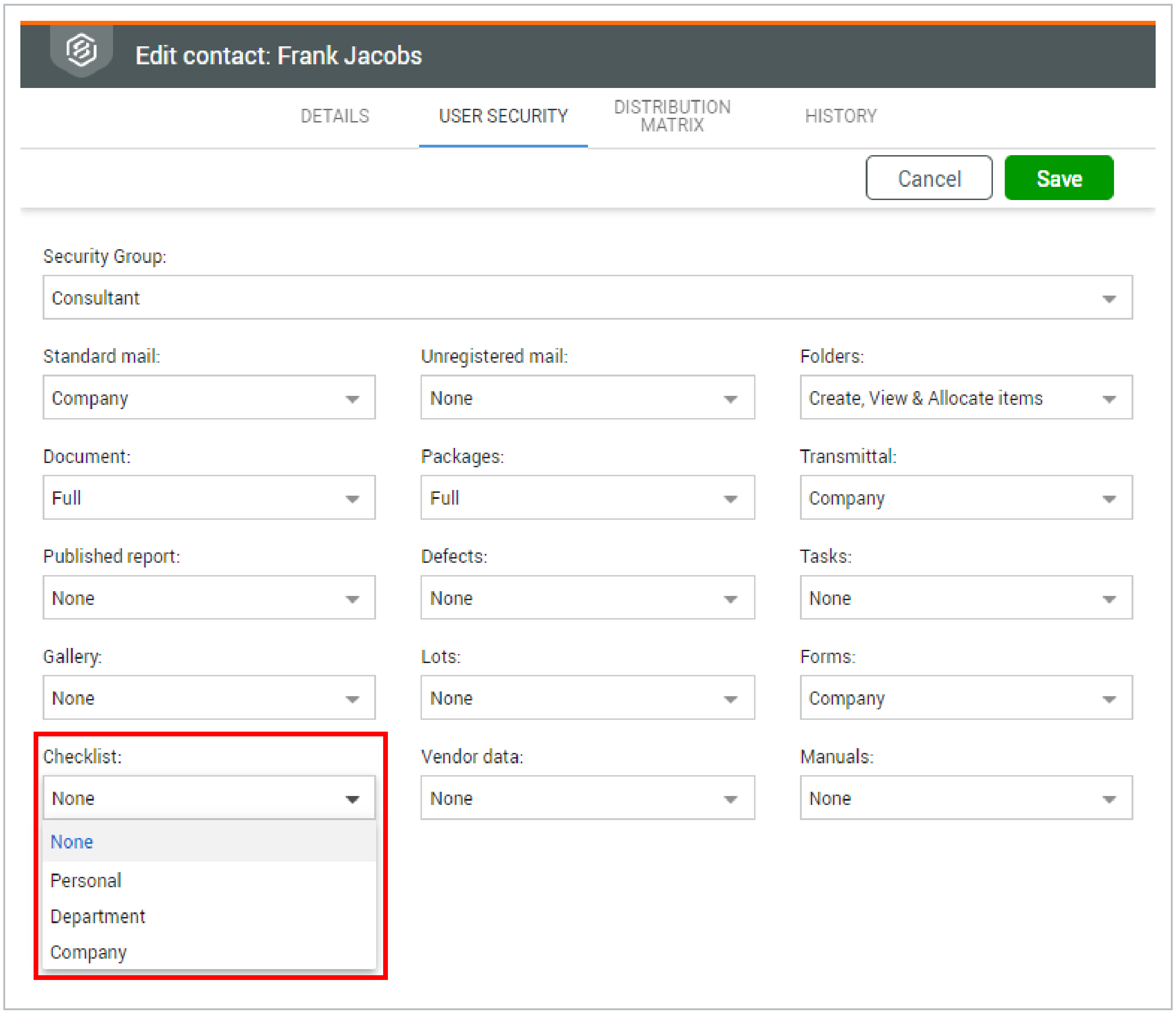
Personal: Users can only access Checklists that they have personally created or been nominated in the For Action/For Info fields.

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.

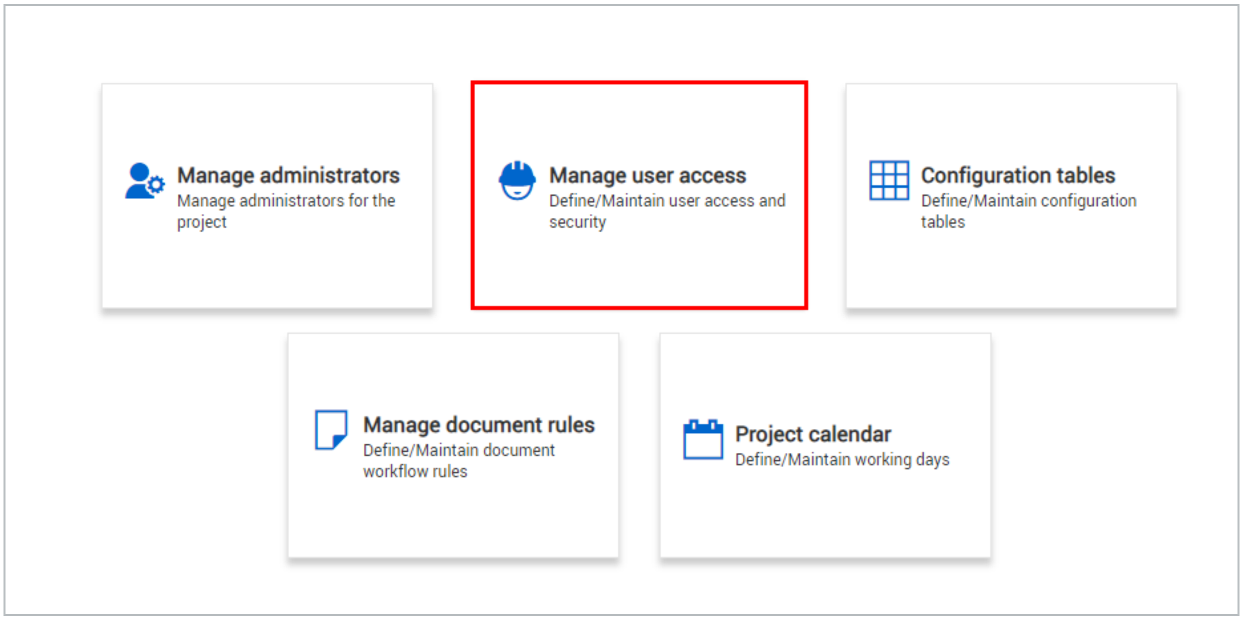


NOTE	User Checklist Access can also be defined from the **User** tab within Security Group Settings.

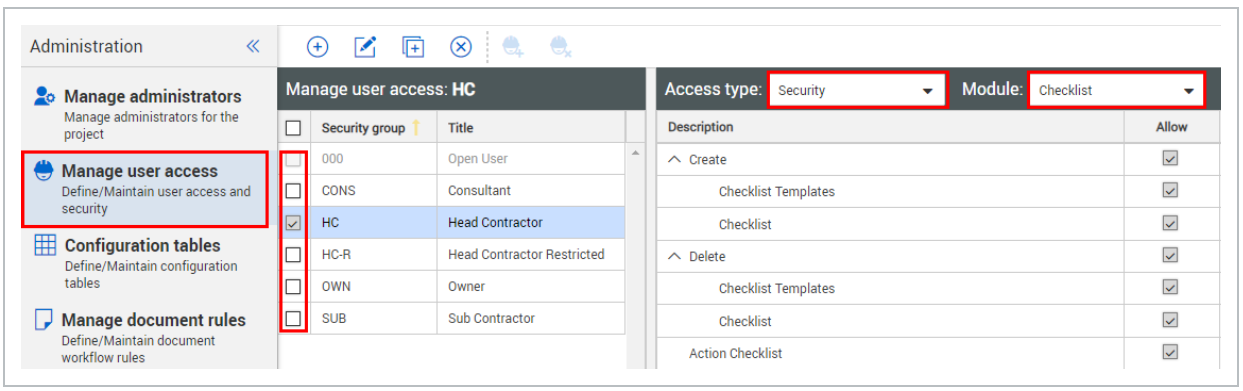
5.1.2 Security Group Level Access

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.