QUICK GUIDE

CHECKLISTS

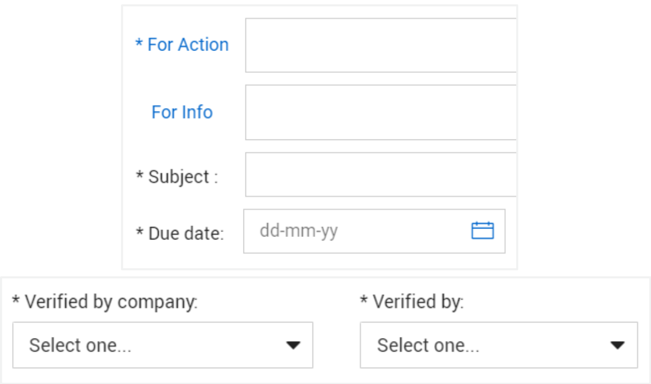
InEight® DOCUMENT

ACCESSING CHECKLISTS

1. Click Document / Dashboard ▶ **Checklists**

STARTING A NEW CHECKLIST

1. Click ⊕ ▾ ▶ select the Checklist Type to be created.
2. Ensure that all mandatory fields are populated - any field with a red asterisk *.



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

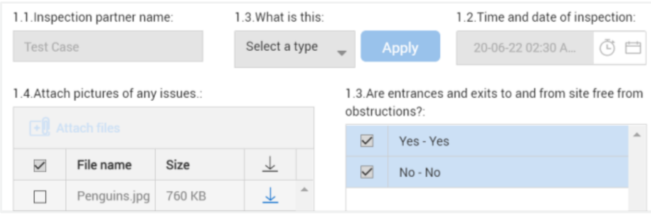
ISSUING A NEW CHECKLIST

1. Open the checklist ▶ click Issue

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

PARTICIPATING IN A CHECKLIST

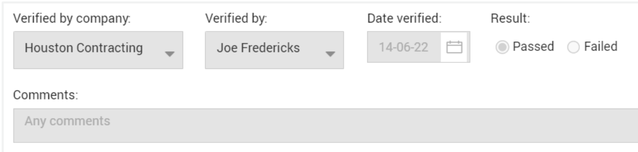
1. In the checklist ▶ complete the items as required in each section like the example below:



2. Click Complete to notify the system that you have completed the relevant Sections and move the Checklist onto the Verifier.

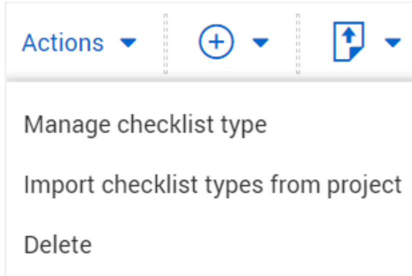
VERIFYING A CHECKLIST

1. In the checklist ▶ complete verification section



CREATING A NEW CHECKLIST type

1. Select the Actions button ▶ Click Manage Checklist Types



2. Click ⊕ to create a new Checklist Type.
3. Fill out the mandatory fields.

4. In the section below, type a section header & drag and drop question types from the components section on the right