

QUICK GUIDE

CHECKLISTS



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 *.

* For Action

For Info

* Subject:

* Due date:

* Verified by company:

* Verified by:

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:

1.1. Inspection partner name: 1.3. What is this: 1.2. Time and date of inspection:

1.4. Attach pictures of any issues.:

<input type="checkbox"/>	File name	Size	<input type="button" value="Download"/>
<input type="checkbox"/>	Penguins.jpg	760 KB	<input type="button" value="Download"/>

1.3. Are entrances and exits to and from site free from obstructions?: Yes - Yes No - No

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

Verified by company: Verified by: Date verified: Result: Passed Failed

Comments:

CREATING A NEW CHECKLIST type

1. Select the **Actions** button ▶ Click **Manage Checklist Types**

Actions

Manage checklist type

Import checklist types from project

Delete

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

* Checklist type ID

* Title

* Checklist category

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

SECTION

**Type section header here*

Drag and drop question types here