



**CHECKLIST USER
GUIDE**

DOCUMENT MANAGEMENT

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CHAPTER 1 – INTRODUCTION TO CHECKLISTS

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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 7

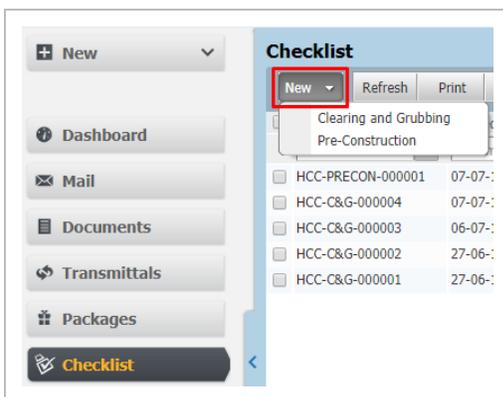
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2.3 Participating in a Checklist 8

2.4 Verifying a Checklist 8

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.



The screenshot shows a web form titled "Clearing and Grubbing". At the top, there are three buttons: "Save", "Issue", and "Close". The "Issue" button is highlighted with a red rectangular box. Below the buttons is a "Details" section with the following fields:

- "For Action": John Smith (Houston Contracting) x
- "For Info": Greg Harrison (Houston Contracting) x
- "Subject*": Clearing and Grubbing Checks for Area 425
- "Due Date*": 31-08-17

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.

Verification

Verified By*: TeamBinder TRAINING Matthew Scott On*: 24-08-17

Result*: Passed Failed

Comments:

CHAPTER 3 – CHECKLIST TYPES

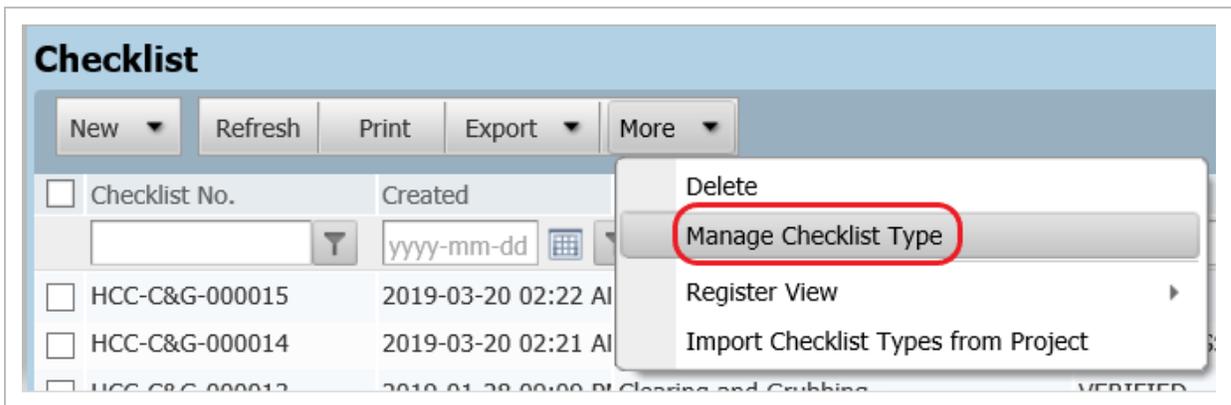
InEight Document Checklists can be created by Project Administrators. Administrators can also define sections, questions and response types.

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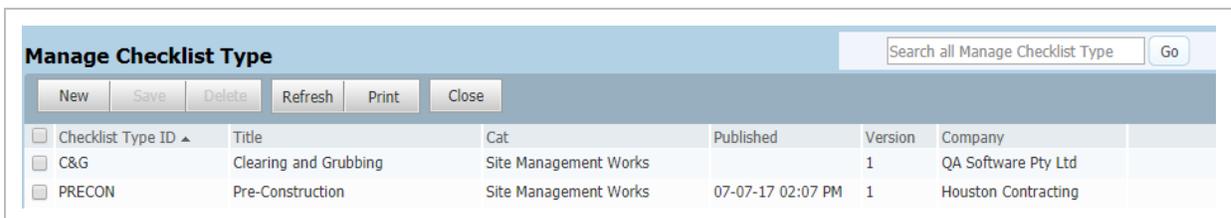
3.1 CREATING A NEW CHECKLIST TYPE

To create a new Checklist Type:

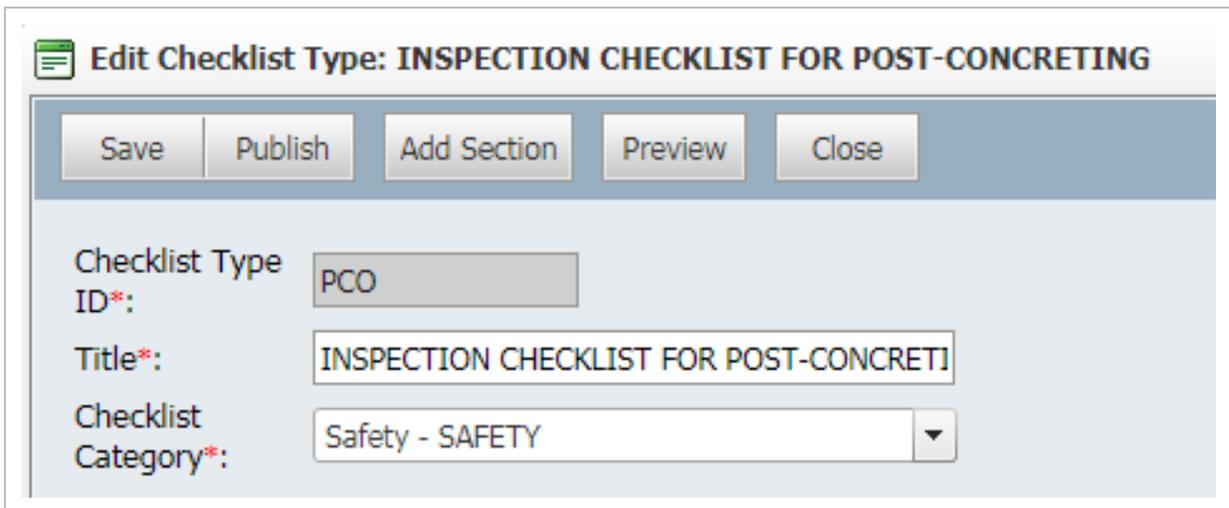
1. Open the **Checklist** Module.
2. Select **More** from the top Menu.
3. Click **Manage Checklist Types**.



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.



Edit Checklist Type: INSPECTION CHECKLIST FOR POST-CONCRETING

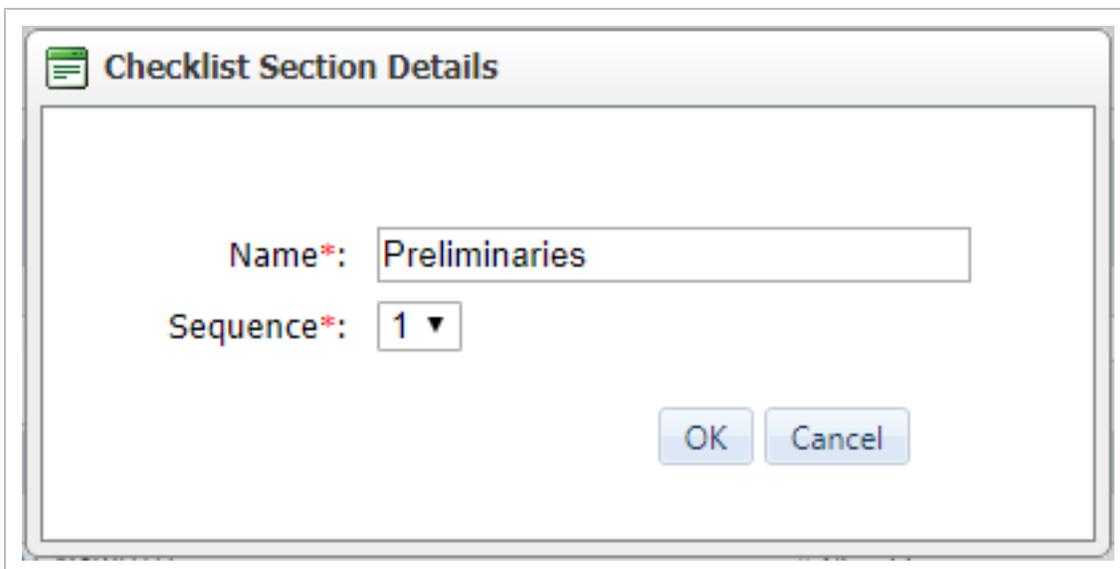
Save Publish Add Section Preview Close

Checklist Type ID*: PCO

Title*: INSPECTION CHECKLIST FOR POST-CONCRETI

Checklist Category*: Safety - SAFETY

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



Checklist Section Details

Name*: Preliminaries

Sequence*: 1

OK Cancel

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.

The screenshot shows a configuration form for a checklist. At the top, there are fields for 'Checklist Type ID*' (FAR), 'Title*' (First Aid Record), and 'Checklist Category*' (SF - Safety). Below this is a section titled 'Sections' with a sub-section 'Incident'. This section contains a table with two rows of items:

Sequence	Item No.	Description	Tooltip	Response Type	Mandatory	More>>
1	1	Who was injured?		Address Book	<input type="checkbox"/>	More>>
2	2	What occurred?	Describe the incident and cause if possible	Multiline Text	<input type="checkbox"/>	<input type="checkbox"/>

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.

Edit Checklist Type: INSPECTION CHECKLIST FOR POST-CONCRETING

Save **Publish** Add Section Preview Close

Checklist Type ID*: PCO
 Title*: INSPECTION CHECKLIST FOR POST-CONCRETI
 Checklist Category*: Safety - SAFETY

Sections

Header Information			
Sequence	Item No.	Description	Mandatory
1	01	Location of Pour- Gridlines	<input type="checkbox"/> More >>
2	02	Grade of Concrete	<input type="checkbox"/> <input checked="" type="checkbox"/>
3	03	Volume of Concrete	<input type="checkbox"/> <input checked="" type="checkbox"/>

NOTE

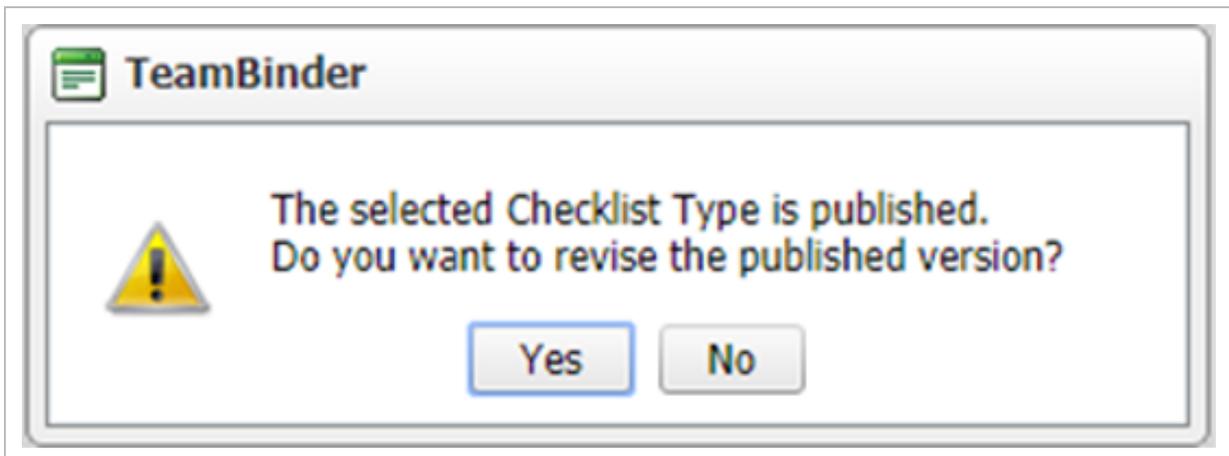
- The Input template can be viewed by clicking **Preview**.
- The Output can also be viewed on an active Checklist by clicking **Print** and **Print Preview**.

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.

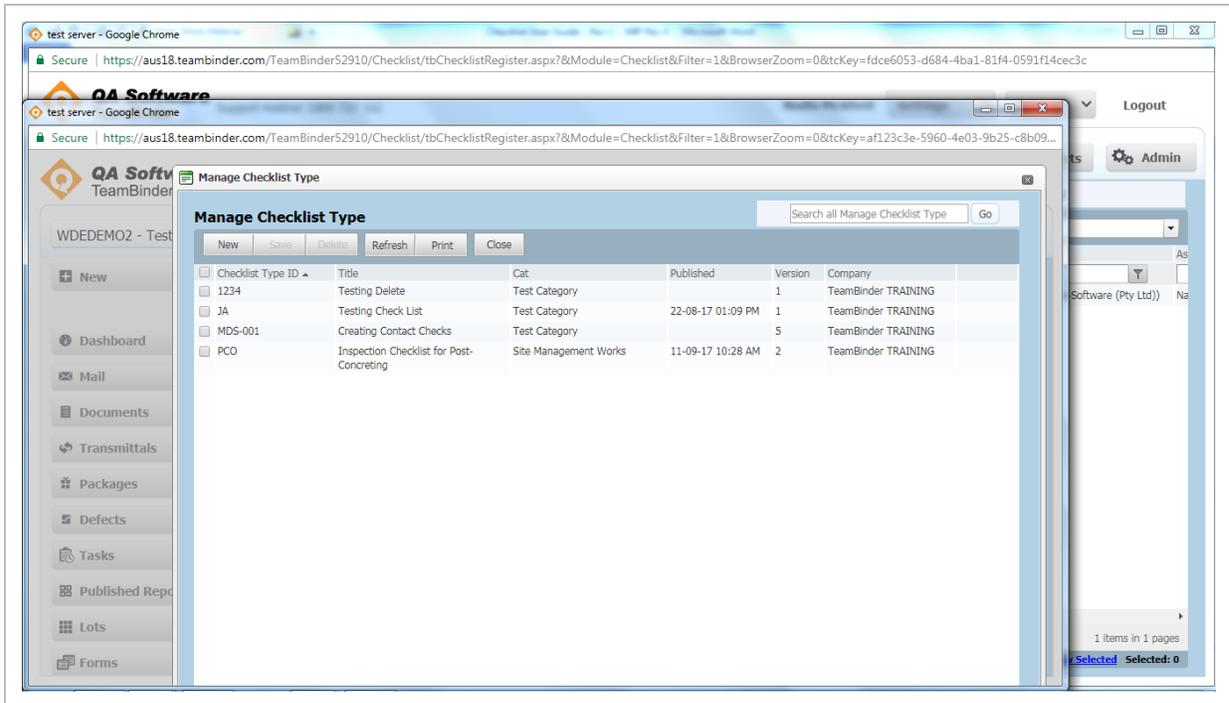
To update a Checklist Type as an Administrator:

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



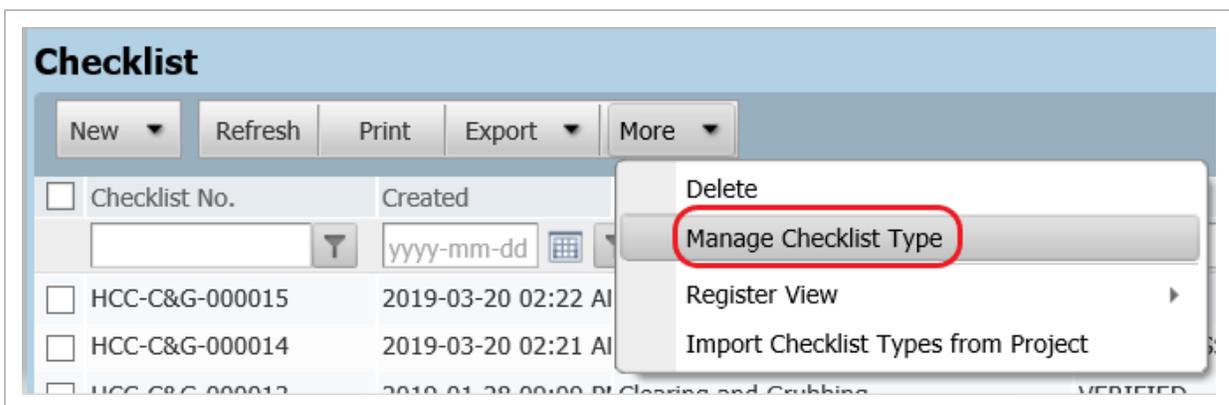
3. Select **Yes** to update the Checklist Type.
4. Once all updates are made, click **Publish** to update the form. The version of the form will

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.



Checklist Type ID	Title	Cat	Published	Version	Company	Verifier
CLSR	Check List CLSR	Check List 1	02-01-19 03:22 PM	1	QA Software Pty Ltd	Configure

3. Select **Add Users**.



Configure Checklist Verifiers

Valid Verifiers for Clearing and Grubbing

All Users

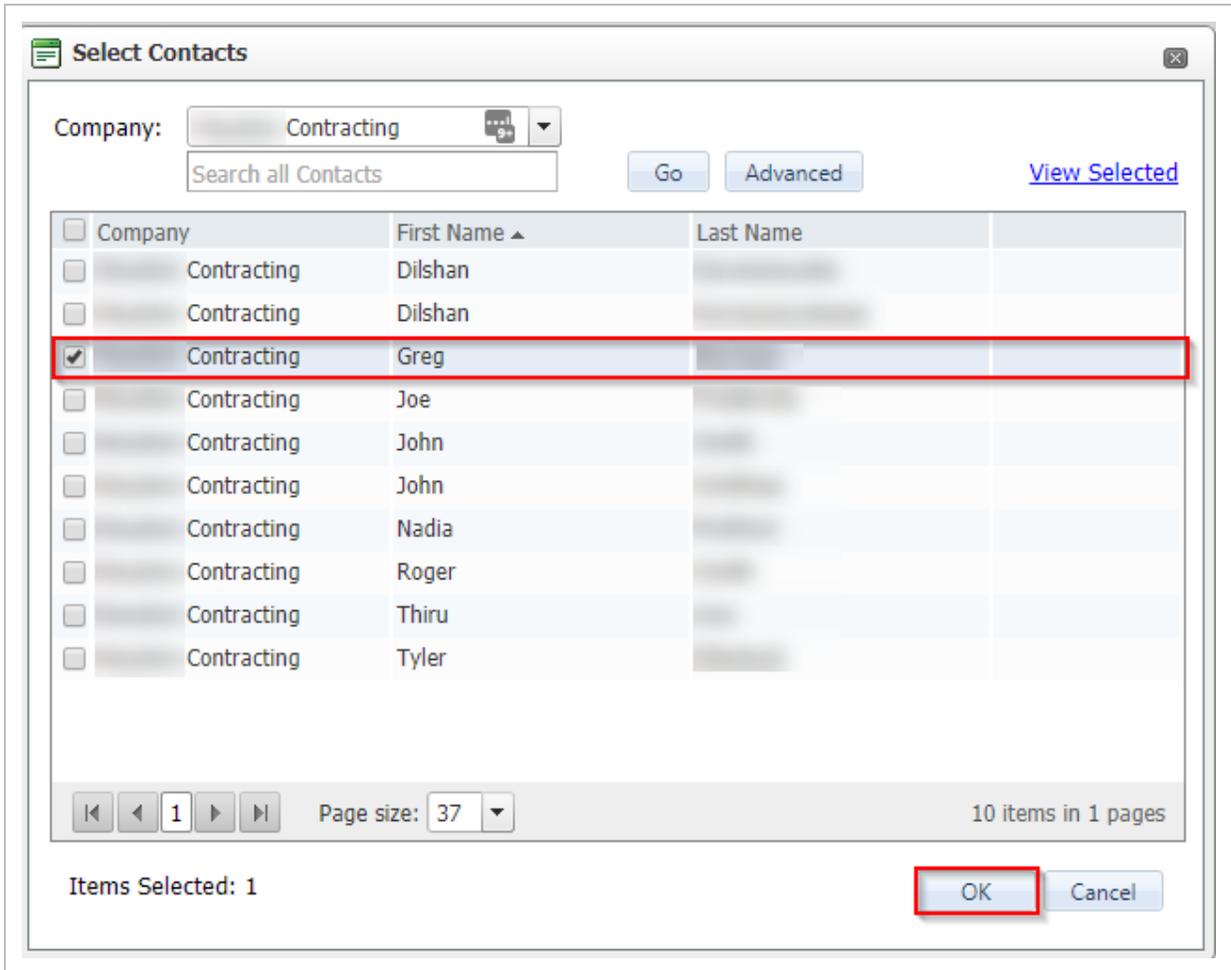
Selected Users

First Name Company

No records to display.

Add Users Remove

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



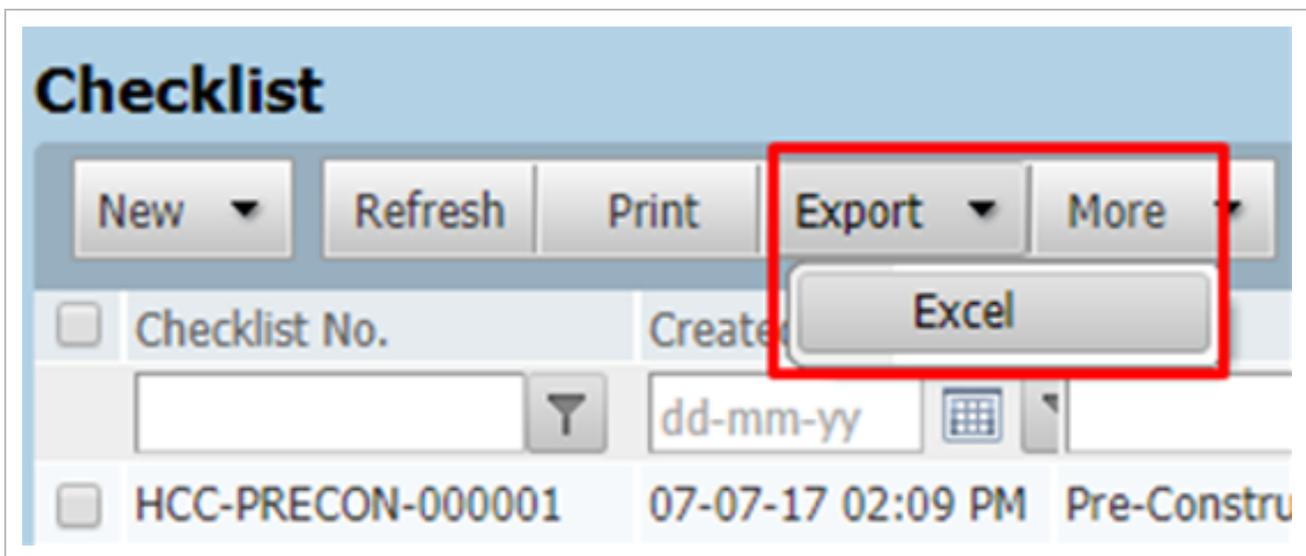
- 5. Select **Save**.

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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.

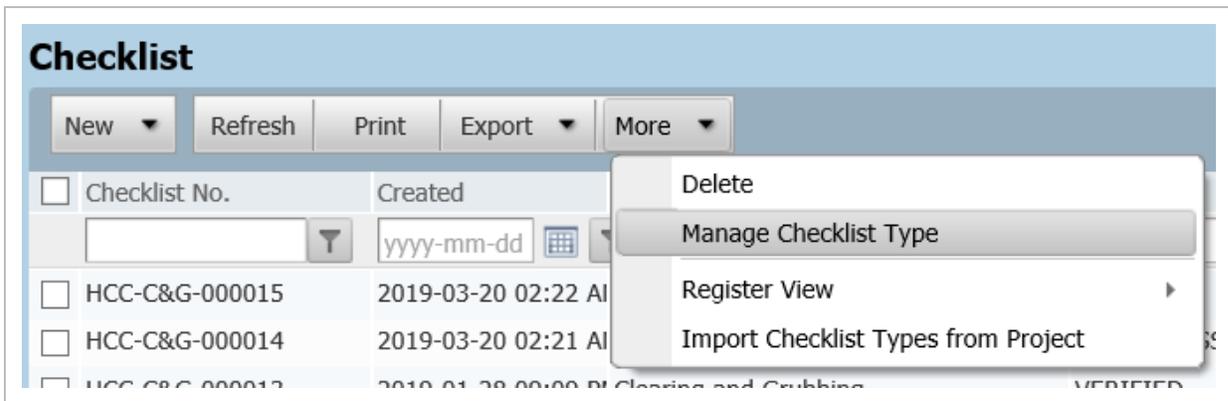
2. Click **More**, then **Delete**.

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

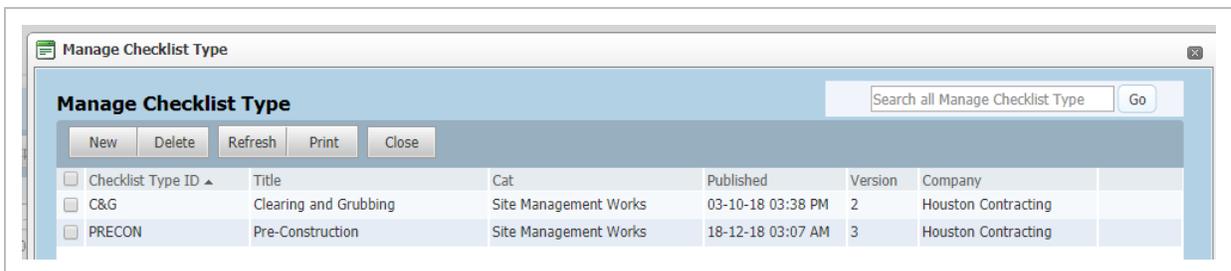
4.3 CREATING A FORM FROM A CHECKLIST

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**.

Edit Checklist Type: Pre-Construction

Save Publish Add Section Preview Close

Checklist Type ID*: PRECON
 Title*: Pre-Construction
 Checklist Category*: Site Management Works - SMW
 Display Lot section on Checklist

Sections

PHASE 1

Sequence Item No.	Description*	Tooltip	Response Type*	Mandatory
1	Is there a construction environmental management plan that pertains to the site or the works?	Enter a Tool Tip Here	Text	<input checked="" type="checkbox"/>
2	Has a suitably qualified environmental site representative been appointed?		Text	<input type="checkbox"/>
3	Is the project delivery team briefed on the CEMP or equivalent?		Text	<input type="checkbox"/>
4	Has an onsite risk assessment been completed in the field, signed by the delivery team and appended to the CEMP for records?		Text	<input type="checkbox"/>

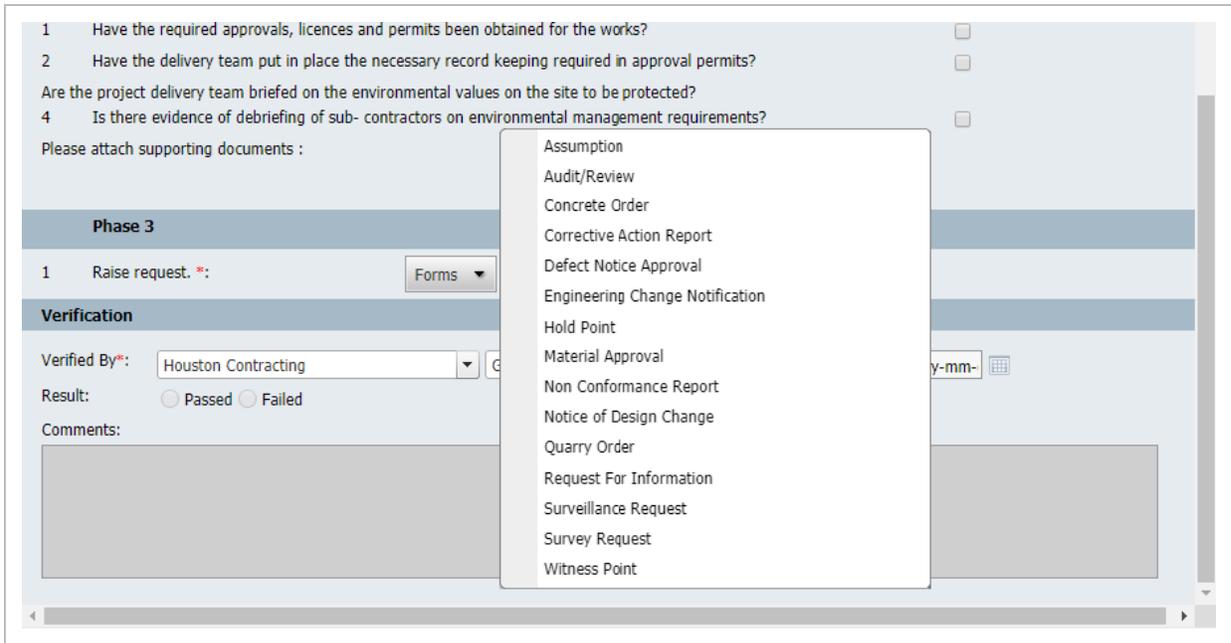
PHASE 2

Sequence Item No.	Description*	Tooltip	Response Type*	Mandatory
1	Have the required approvals, licences and permits been obtained for the works?		Checkbox	<input checked="" type="checkbox"/>
2	Have the delivery team put in place the necessary record keeping required in approval permits?		--- Select one ---	<input type="checkbox"/>
3	Are the project delivery team briefed on the environmental values on the site to be protected?		Text	<input type="checkbox"/>
4	Is there evidence of debriefing of sub- contractors on environmental management requirements?		Date	<input type="checkbox"/>
5	Please attach supporting documents		Checkbox	<input type="checkbox"/>
			Label	<input type="checkbox"/>
			Attach File	<input type="checkbox"/>
			Text Area	<input type="checkbox"/>
			Yes/No	<input type="checkbox"/>
			Checkbox Group	<input type="checkbox"/>
			Dropdown List	<input type="checkbox"/>
			Configuration Table	<input type="checkbox"/>
			Address Book	<input type="checkbox"/>
			Date	<input type="checkbox"/>
			TeamBinder Action	<input type="checkbox"/>
			TeamBinder Action	<input checked="" type="checkbox"/>

Phase 3

Sequence Item No.	Description*	Tooltip	Response Type*	Mandatory
1	Raise request.		TeamBinder Action	<input checked="" type="checkbox"/>

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

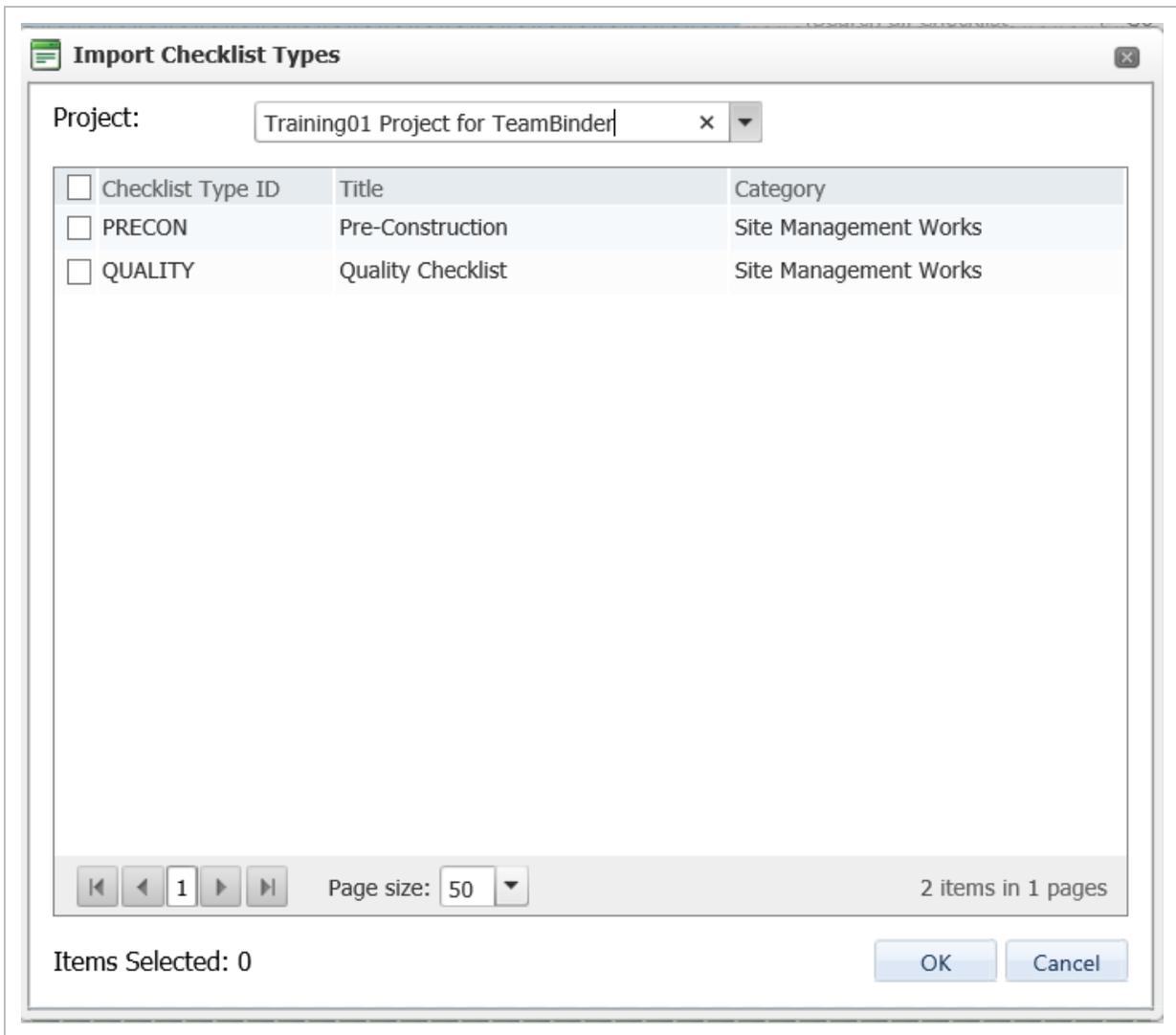


5. The Form is created while the Checklist is in progress. Once the form is Saved the hyperlink to the form is stored on the checklist.

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.

The screenshot displays the 'Check List CLSR' interface. At the top right, the 'Checklist Ref: QAS-CLSR-000002' is shown. Below this, there is a navigation bar with buttons for 'Save', 'Complete', 'Print', 'Close', and 'More'. The 'Print' button has a dropdown arrow, and the 'Print Preview' option is highlighted with a red box. To the right of the navigation bar is a status dropdown menu set to 'In Progress'. Below the navigation bar are tabs for 'Details', 'Links', and 'History'. The main form area contains several input fields: 'For Action' with a dropdown menu showing 'David', 'For Info' with an empty dropdown, 'Subject*' with the value 'Checklist 001 - Building B', and 'Due Date*' with the value '03-29-19' and a calendar icon. A section titled 'Test' contains 'Inspection Date' with the value '03-08-19' and a calendar icon, 'Inspection Comments' with the value 'inspection completed', and 'Area' with a dropdown menu showing 'BLDG-B - Building B'.

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

Print Preview

Print Close

CLSR Reference No: QAS-CLSR-000002
Status: INPROGRESS

For Action: David [blurred]
Project: P21TB5TEST
Subject: Checklist 001 - Building B
Due Date: 22 March 2019

01 - Test

Description	Response	Created By	Created On	Edited By	Edited On
Inspection Date	2019-03-08	David [blurred]	06 March 2019	David [blurred]	06 March 2019
Inspection Comments	inspection completed	David [blurred]	06 March 2019		
Area	Building B-BLDG-B	David [blurred]	06 March 2019		

Verification

Verified By: David [blurred]
Verified On:
Result:
Verify Comments:

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.

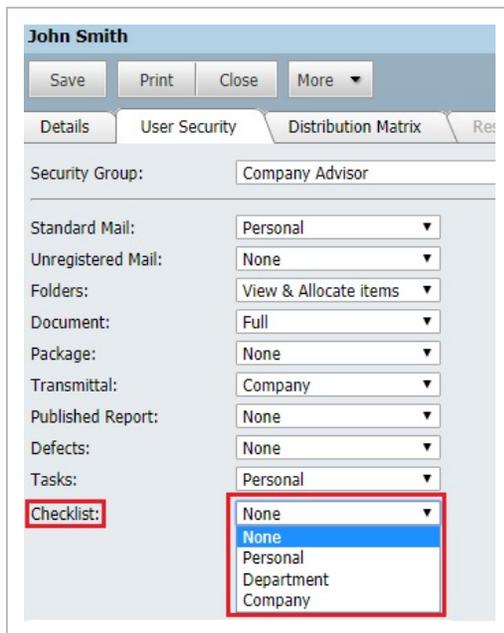
Department: Along with the Personal access rights, users can access Checklists where another user from the same Department (of the same Company) has personally created or been listed in the For Action/For Info fields.

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.



The screenshot shows the user security settings for John Smith. The 'User Security' tab is selected. The 'Security Group' is set to 'Company Advisor'. The 'Checklist' dropdown menu is open, showing options: None, Personal, Department, and Company. The 'None' option is highlighted.

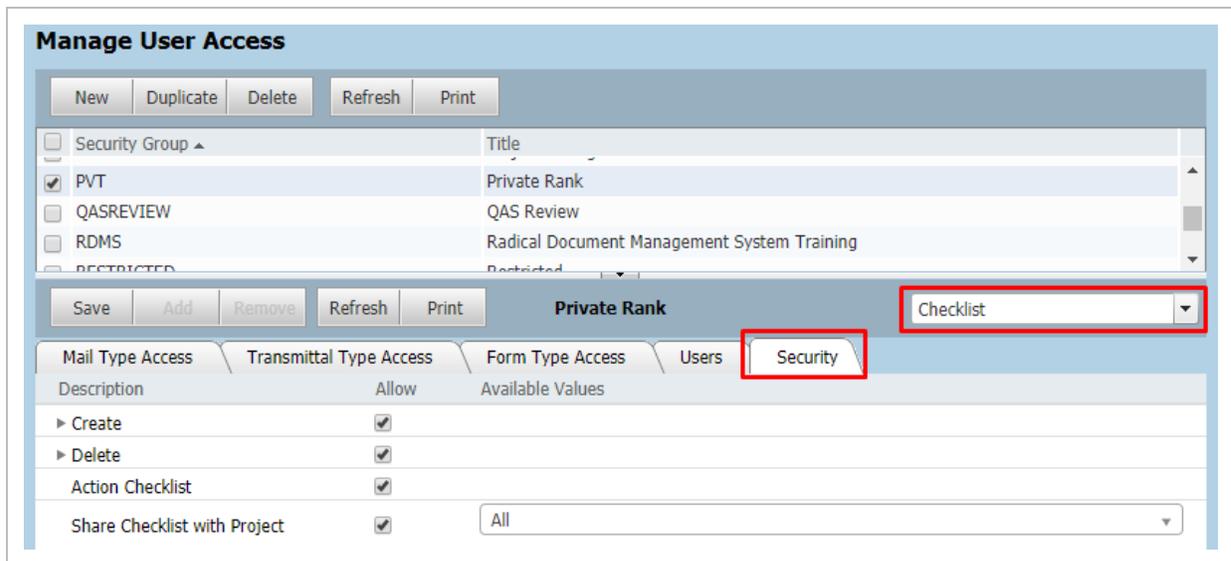
NOTE User Checklist Access can also be defined from the **User** tab within Security Group Settings.

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.

The screenshot shows the user security configuration for John Smith. The 'User Security' tab is selected, and the 'Security Group' is set to 'Company Advisor'. A list of security modules is displayed with dropdown menus for each. The 'Checklist' dropdown is highlighted with a red box, and its options are: None (selected), Personal, Department, and Company.

NOTE

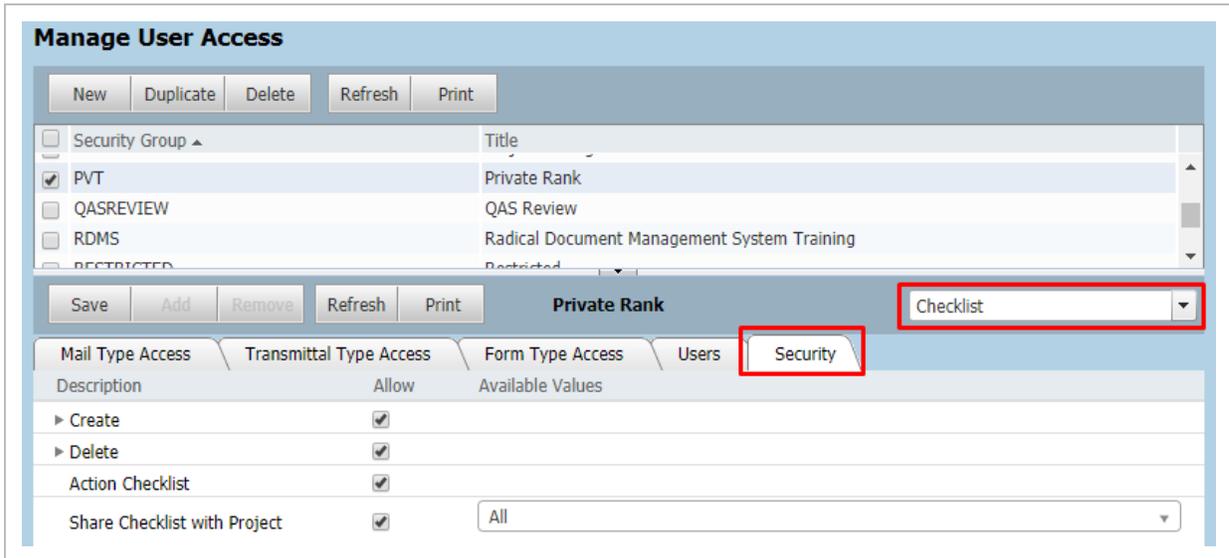
User Checklist Access can also be defined from the **User** tab within Security Group Settings.

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.