Chainformation Admin User Guide
(Checklists Module)

Last Updated: June 14, 2021

Welcome to the **Chainformation** user guide. In this manual, we will learn how to create new checklists, checklist templates, manage saved checklists, templates and checklist reports.

Every **Chainformation** platform features an integrated **Checklists** module that allows you to create interactive digital checklists. These online checklists can be governed by specific roles so that only selected staff can complete the intended list of tasks. These checklists can be set with automated and recurring schedules and serve as a powerful and effective tool to automate and facilitate many of the daily and other routine tasks in your organization.

With the **Chainformation Checklists** module, you can create one-time as well as recurring checklists that will be activated on a daily or monthly basis. These recurring checklists can help you to monitor those tasks that should be performed on a regular basis such as daily opening and closing routines, monthly audits, annual marketing campaigns, etc.

Checklists can be either Central/Global for all Units to execute, or they can be local/regional for specific sites/Units.

Here is a list of some typical organizational tasks that you can complete and monitor using the **Chainformation Checklists** module:

- Daily opening and closing routines
- Cleaning controls
- Exposure and merchandising
- Fire and safety rounds
- Checklist for campaign launches
- Security inspections
- Brand and field audits
- Weekly manager reports
- COVID-19 routine documentation and compliance

Chainformation allows you to create pre-formatted checklist templates and save the existing checklists as new templates. These templates offer a quick and straightforward set up of settings and checkpoints of a checklist. You can link different checkpoints of a checklist to other relevant sections such as a page, file, another checklist, etc. to further explain specific tasks in the respective checklist.

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Once you have created and activated a checklist, your selected colleagues can complete it in the specified due time by marking its checkpoints as **OK** or **Not OK**. You can set up a checklist so that images or any other relevant files will be mandatory to complete its checkpoints.

You can also generate QR-codes and ask the selected users to physically scan them before they can complete specific checkpoints of a checklist. In this way, images and QR-codes can be used to ensure that things are being done correctly in different units of your organization.

Every **Chainformation** platform has a built-in **Reports** section in its **Checklists** module. The **Reports** tab of the **Checklists** page contains all the responses submitted to the saved checklists to date. You can review the units that have completed or not completed a specific checklist. Likewise, you can also find details about the OK and deviation checkpoints of the selected checklist on its **Report** page.

Here is a list of all the features of the **Checklists, Templates** and **Reports** modules that we will discuss in this manual.

- ➢ Create a New Checklist
- ➢ Manage Saved Checklists
    - o Review Saved Checklists
    - o Review Checkpoints of a Checklist
    - o Edit a Checklist
    - o Review a Checklist Report
    - o Save a Checklist as a Template
    - o Disable/Enable Mobile Notifications
    - o Mark a Checklist as Not Applicable
    - o Delete Responses to a Checklist
    - o Delete a Checklist
- ➢ Manage Checklist QR-codes
- ➢ Complete a Checklist
    - o Complete a Checklist in Chainformation Mobile App
    - o Complete a Checklist on Chainformation Website
- ➢ Manage Checklist Template
    - o Create/Save New Checklist Templates
    - o Review Saved Templates
    - o Review Checkpoints of a Template
    - o Edit a Checklist Template
    - o Delete a Checklist Template
- ➢ Manage Checklist Reports
    - o View Saved Reports
   - o Review Latest Status of a Checklist

o Review a Detailed Report

Create a New Checklist

Once you have logged in to the **Chainformation** platform then follow these navigation steps to **create** a **new checklist**.

Note: You must have been granted the appropriate permissions to be able to create a Checklist.

1. Click the **Checklists** button in the left-side menu to open the **Checklists** tab.
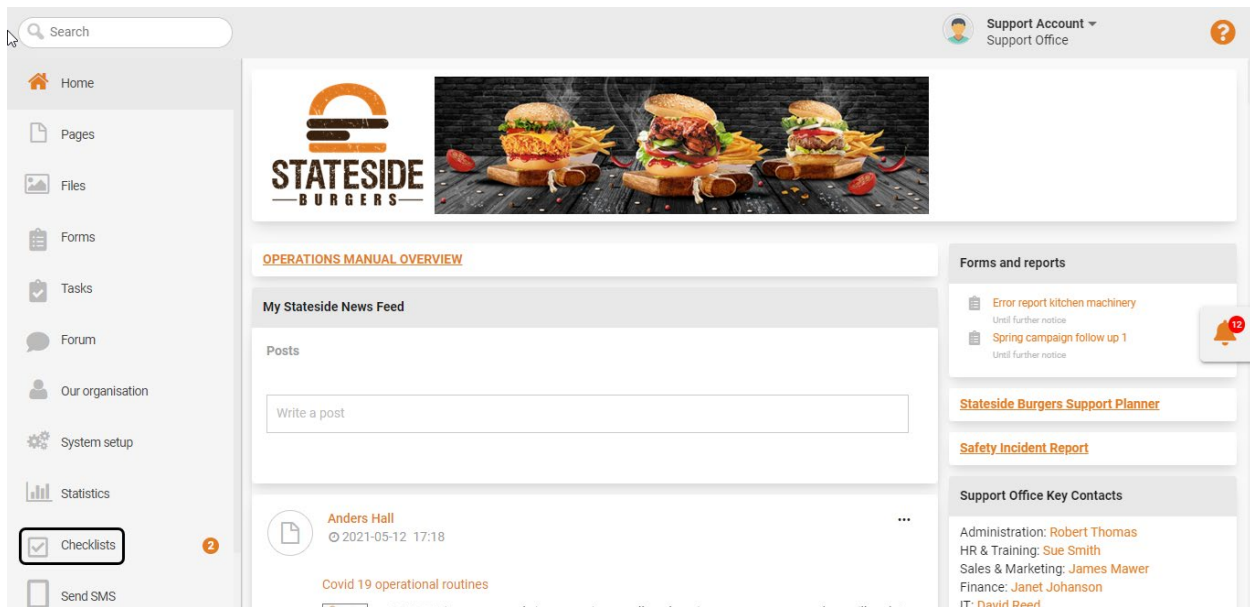
Note: You cannot create or edit **Checklists** on the **Chainformation** mobile app. Therefore, you must log in to the **Chainformation** website platform to create a new checklist or edit a saved checklist. However, all users can easily access, use and complete a checklist in the mobile app.

2. Click the **(+)** icon in the top-right corner of the **Checklists** page to create a new checklist.

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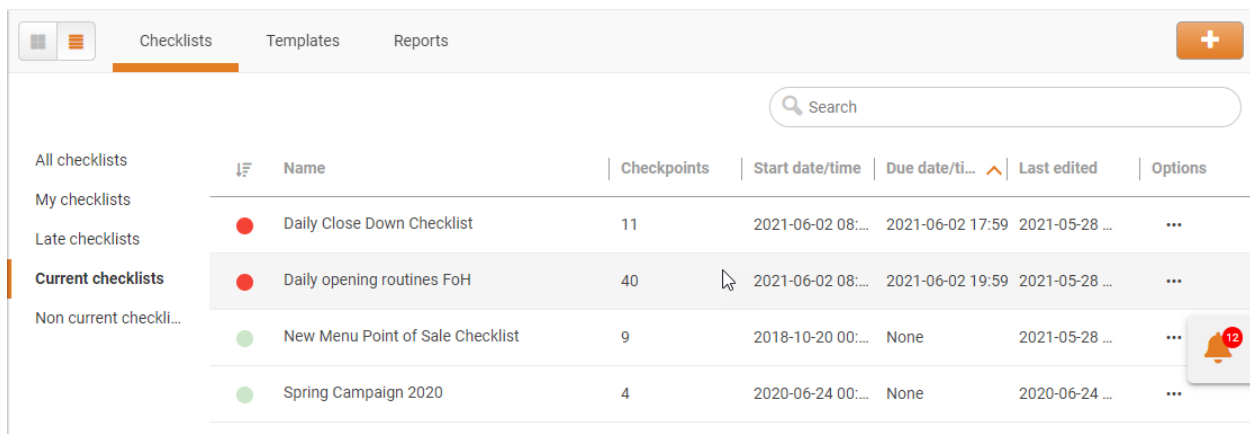
This will open the **New checklist** page.

3. On the **New checklist** page, you can choose to either create a new list, or select a **Checklist template** from your list of saved templates (if you have any).

See the User Guide for **Checklist Templates**

Note: The **Checklist template** field is not mandatory and you can also create a new checklist without selecting a pre-formatted template.

Remember, when you opt to use a pre-formatted template to create a new checklist, then the system will automatically load settings and checkpoints from the selected template to the new checklist. However, you can still change these settings and customize the pre-loaded checkpoints according to your requirements.

Note: Any changes made to a Template will NOT affect checklists already created using this template.

Follow the navigation steps demonstrated below to create a new checklist by editing your selected template or entering all the data on your own.

4. If multiple languages are available, select the **Content language** for the new checklist.

Note: By default, the system will use **English** as the **default content language** for the new checklist. However, you can also select another language if you have added some additional content languages to the **Chainformation** platform.

5. Enter a **Checklist name**. This should be explanatory, short and concise.

6. (If needed) Enter a brief presentation of the new checklist in the **Checklist description** field.

Chainformation offers a basic text editor to format your content in the checklist description.

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7. This is the editor you use to add text, instructions and images into your checkpoints. **bold, underline and italic** your text.

8. You can create **numbered** and **bullet** lists.

9. You can insert a file from the **Files** tab or upload it from your device in the text block. See the User Guide for **Files**

10. You can **insert** a **link** to another **checklist**, a **colleague**, **file**, **page**, **form**, **website** and **email address**.

10(a). Click the item type whose link you want to insert in the checklist description.

This will open the **Insert link** pop-up tab.

10(b). Select the item from the dropdown menu shown on the screen to insert its link.

10(c). You can also use the **Extended Search** feature to see a detailed list of required items and select an item from this list.

10(d). You can write a **Link text** that will be shown in the checklist description instead of the selected item name.

Note: The system will automatically use the selected item name as the link text if you leave the **Link text** field empty.

10(e). Click the **DONE** button on the **Insert link** tab to insert the link of the selected item to the checklist description.

Now, select the appropriate options in the **Optional settings** under the **Settings** section.

11. In the **Share** options, select the **Not shared** option if you do not want to share this checklist with any other user in your organization for now.

12. If you want to share/publish the new checklist with your selected colleagues, select the **Continuous** option and set a **Start date** when the checklist will be available to the selected users in your organization.

Now, the checklist will be available forever, until it's manually changed.

13(a). If you want to share the checklist with your selected colleagues for a definite period, select the **Time limited** option.

13(b). Set a **Start date** when the checklist will be available to the selected users in your organization.

13(c). Set an **End date** when the checklist will be no longer available to the selected users in your organization.

Recurring/scheduled checklist

14. In the **Time settings**, select the **Recurring** option if you want to repeat this checklist based on a schedule. It can be set for a wide variety of frequencies. Daily, weekly, monthly etc.

15. Select the **Daily** option in the **Repeat frequency** field if you want to activate a schedule that repeats daily or selected days in a week.

Note: The **daily repeat frequency** could be anything from at least once an hour to at most once a week. For example, you can create an hourly checklist to monitor the cleaning situation in different units of your organization.

15(a). Select one or more **Days** of the week to activate the checklist.

15(b). In the **Starting time(s)**, select one or more hours of the day to activate the checklist. Normally you only have one time selected for a daily list.

The system will automatically activate the checklist on every selected hour of the selected days.

15(c). In the **Due time** field, select the number of **Days** and **Hours** for which the checklist will be available to complete.

Remember, you can select the number of **days** and **hours** in the **due time** field only within the limits of your selected **daily repeat frequency**. For example, you cannot select a due time of more than 24 hours if you have selected two consecutive days in the **Days** field. On the other

hand, you can select a due time of even up to 7 days if you have selected only one day of week in the **Repeat frequency** field.

15(d). In the **Remind time** field, select the number of **Days** and **Hours** after which you want the system to send a reminder/push notification to your selected colleagues about the checklist.

Remember, you cannot select a remind time more than the due time. Furthermore, we strongly recommend to select a remind time at least 1 hour less than the due time so that all the users can complete the checklist before the deadline.

Note: The system will calculate the number of **days** and **hours** for the **due** and **remind time** from the instance when the checklist will be activated i.e. right from the hour you have selected in the **Start time(s)** field.

Time settings	● Recurring ○ One time	
15 → Repeat frequency	Daily ▼	ⓘ
15(a) → Days	Monday, Friday ▼	ⓘ
15(b) → Starting time(s)	08:00, 18:00 ▼	ⓘ
15(c) → Due time	0 days ▼ 2 hours ▼	ⓘ
15(d) → Remind time	0 days ▼ 1 hour ▼	ⓘ

16. Select the **Monthly** option in the **Repeat frequency** field if you want to activate and publish this checklist on a monthly basis.

Note: The **monthly repeat frequency** could be anything from at least once a day to at most once a year. For example, you can create a quarterly checklist that will automatically initiate after every 3 months and may help you to regulate your marketing campaign launches, security inspections, brand and field audits, etc.

16(a). Select one or more **Months** of the year to activate the checklist.

16(b). In the **Starting day(s)**, select one or more days of the month to activate the checklist.

The system will automatically activate the checklist on every selected day of the selected months.

16(c). In the **Due time** field, select the number of **Months** and **Days** for which the checklist will be available to complete.

Remember, you can select the number of **months** and **days** in the **due time** field only within the limits of your selected **monthly repeat frequency**. For example, you cannot select a due

time of more than one month if you have selected two consecutive months in the **Months** field. On the other hand, you can select a due time of even up to 12 months if you have selected only one month of year in the **Repeat frequency** field.

Note: The maximum number of days of a month you can select as the **due time** of the checklist depends on which months you have selected in the **Months** field. For example, you cannot select the due time of more than 28 days for a checklist if February is involved in your selection of months.

16(d). In the **Remind time** field, select the number of **Months** and **Days** after which you want the system to send a reminder to your selected colleagues about the checklist.

Remember, you cannot select a remind time more than the due time. Furthermore, we strongly recommend to select a remind time at least 1 day less than the due time so that all the users can complete the checklist before the deadline.

Note: The system will calculate the number of **months** and **days** for the **due** and **remind time** from the instance when the checklist will be activated i.e. right from the start of the day you have selected in the **Start time(s)** field.

One-time checklist

17. If you want to create a one-time checklist and do not want to repeat it, then select the **One-time** option in the **Time settings.** A one-time checklist can be used for example to: secure campaign implementation, new store opening checklist etc.

Now, select the appropriate options in **Other settings**.

18. Check the checkbox next to the "**Save settings as new template**" option if you want to save this checklist as a new template to create new checklists in the future. See the User Guide for **Checklist Templates**

19. Check the checkbox next to the "**Enable QR-codes**" if you want to enable QR-scanning to complete selected checkpoints of the checklist. See the User Guide for **QR-Codes**

20. Check the checkbox next to the "**Show reports to other users**" option if you want to allow your selected colleagues to view the report for this checklist. See the User Guide for **Checklist Reports**

21. Select a **Sharing selection** for the new checklist.

Note: You cannot share a checklist with your colleagues individually and must select at least one unit in the sharing selection for a checklist. See the User Guide for **Sharing Selection**

Furthermore, a sharing selection will be effective only if you have selected the **Continuous** or **Time limited** option. If you have selected the **Not Shared** option, then the checklist will be shared with no other users in your organization regardless of the sharing options you have selected in the **Sharing selection** field.

Now, follow the navigation steps demonstrated below to add tasks to the new checklist and customize these tasks.

Remember, if you are creating the checklist using a pre-formatted template, then the system will automatically load tasks from the selected template to the new checklist. However, you can still edit these tasks, delete them or add new tasks according to your requirements.

Here is a brief summary of all the features of tasks and their corresponding sections that you can add in a checklist.
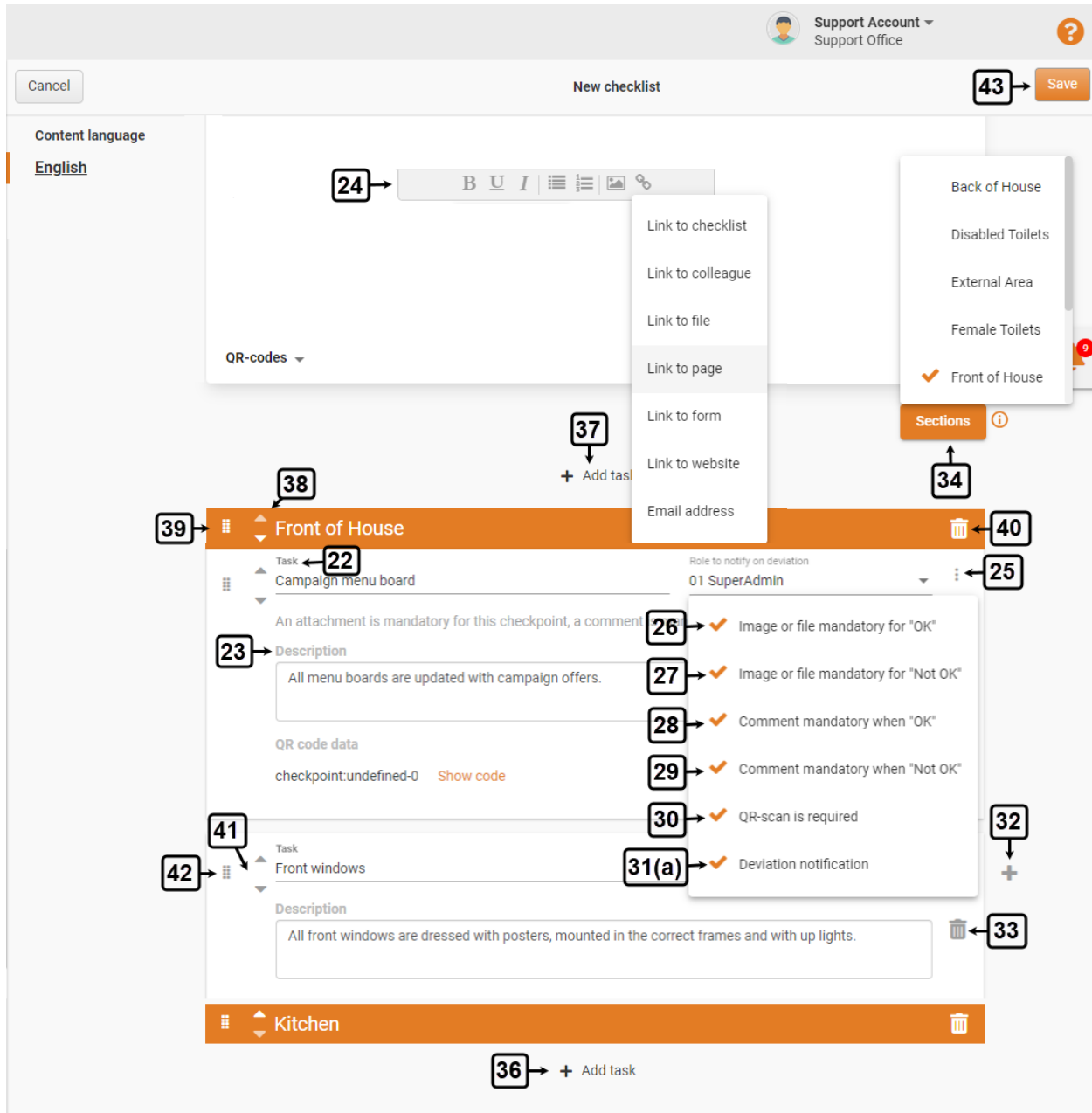
22. Enter a **Task** heading or name that will be shown at the top of a checkpoint.

23. Enter a brief **Description** of each task to explain when and how this checkpoint will be considered as completed.

24. **Chainformation** offers a basic text editor to format your content in the task description. This editor works exactly the same way as the text editor for the checklist description.

25. Click the **4-dots ellipsis** icon next to a task name to select different user options for a checkpoint.

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26. Users will have to upload an image or file if the checkpoint is marked as OK when you select the **Image or file mandatory for "OK"** option.

27. Users will have to upload an image or file if the checkpoint is marked as NOT OK when you select the **Image or file mandatory for "Not OK"**.

28. Users will have to leave a comment to mark the checkpoint as ok when you select the **Comment mandatory when "OK"** option.

29. Users will have to leave a comment to mark the checkpoint as not ok when you select the **Comment mandatory when "Not OK"** option.

30. If you select the **QR-scan is required** option, then your selected colleagues will have to scan a QR-code with the mobile camera before they can complete this checkpoint.

Remember, you can select the **QR-scan is required** option only if you have **enabled QR-codes** in **other settings** of the checklist. For more details, see the User Guide for **QR-Codes**

29. You can add extra notifications which are sent to specified roles when there are deviations to this checklist i.e. the selected users marked its checkpoints as NOT OK.

31(a). Click the **Deviation** notification button in a task menu to select a role to notify deviations.

31(b). **Select a role** to notify from the dropdown menu shown on the screen and click the **OK** button to confirm your selection.
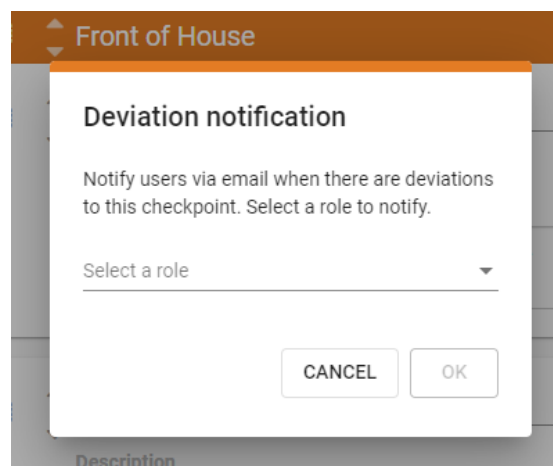
Remember, you cannot select an individual colleague for deviation notifications. Furthermore, you can select only one role to notify. See the User Guide for **Roles**

The system will notify all users in your organization with the selected role via email when there will be deviations to the selected checkpoints.

32. You can add more tasks to your checklist by clicking the (**+**) icon on the right side of the last task in your checklist or one of its sections.

33. You can delete a task from the checklist by clicking the **Bin** icon next to its description.

34. You can arrange tasks of a checklist in different groups by clicking the **Sections** button and selecting a section from the menu shown on the screen.

Note: The **Sections** menu will only allow you to select sections that are already saved in the system and you cannot create an altogether new section on the **New checklist** page.

In fact, the sections shown on the **New checklist** page are tags that you or your colleagues have created for the **Checklists** module. If you want to create a new section for your checklist, then you will have to save it as a new tag for the **Checklists** module in the **Tags** module. See the User Guide for **Tags**

35. Repeat the process demonstrated in the previous step to add more sections to your checklist.

36. Click the **+ Add task** button in an empty section to add tasks to it.

37. When you have grouped tasks in your checklist in different sections, you can still add a task without associating it to any section by clicking the **+ Add task** button at the top of all sections.

38. You can move a section up or down by clicking the **up** and **down arrow** icons in its heading bar.

39. You can also move a section up or down by clicking the **8-dots ellipsis** icon in its heading bar and dragging it to the new position.

40. You can delete a section by clicking the **bin** icon next to its name.

41. You can move a task up/down within a section, into another section or to a position with no section by clicking the **up** and **down arrow** icons in its heading bar.

42. Likewise, you can also move a task up or down by clicking the **8-dots ellipsis** icon in its heading bar and dragging it to the new position.

Once you have formatted the new checklist, carefully review all the settings, tasks and the options you have selected for each task.

43. Click the **Save** button in the top-right corner of the screen to publish and activate the new checklist.

The system will notify your selected colleagues about this checklist and also reactivate it after

specified intervals if this is a recurring checklist.

Manage Saved Checklists

On the **Checklists** page, you can **view** and **manage** the checklists created by you and your colleagues.

In this section, we will discuss the following features of the **Checklists** module.

- ➢ Review Saved Checklists
- ➢ Review Checkpoints of a Checklist
- ➢ Edit a Checklist
- ➢ Review a Checklist Report
- ➢ Save a Checklist as a Template
- ➢ Disable/Enable Mobile Notifications
- ➢ Mark a Checklist as Not Applicable
- ➢ Delete Responses to a Checklist
- ➢ Delete a Checklist

Review Saved Checklists

Once you have opened the **Checklists** page on the **Chainformation** website platform as demonstrated in the previous section, you can view different checklists under the following categories.

1. Current checklists

By default, you will be redirected to the **Current checklist** tab. This tab contains the checklists that are currently available to complete. See the User Guide for **Complete a Checklist**

2. Non current checklists

This tab contains the recurring checklists that have expired and are not available to complete for now but these checklists will be reactivated soon.

You cannot complete a checklist when it is in the **non-current checklists** tab. However, you will be able to complete it once it has been reactivated and moved back to the **current checklists** tab.

3. Late checklists

This tab contains the checklists that have passed their deadline and you have not completed them in time.

However, you can complete the **late checklists** after their deadline too if they are still applicable. <u>See the User Guide for **Complete a Checklist**</u>

4. My checklists

This tab contains all the checklists that have been created by you.

5. All checklists

This tab contains all the checklists that have been either created by you or your colleagues have shared them with you. You will find all the **late**, **current**, and **non-current** checklists in the **all checklists** tab.

Search a Checklist

6. You can also use the **Search** field to find a checklist based on any of the available data/information. <u>See the User Guide for **Search**</u>
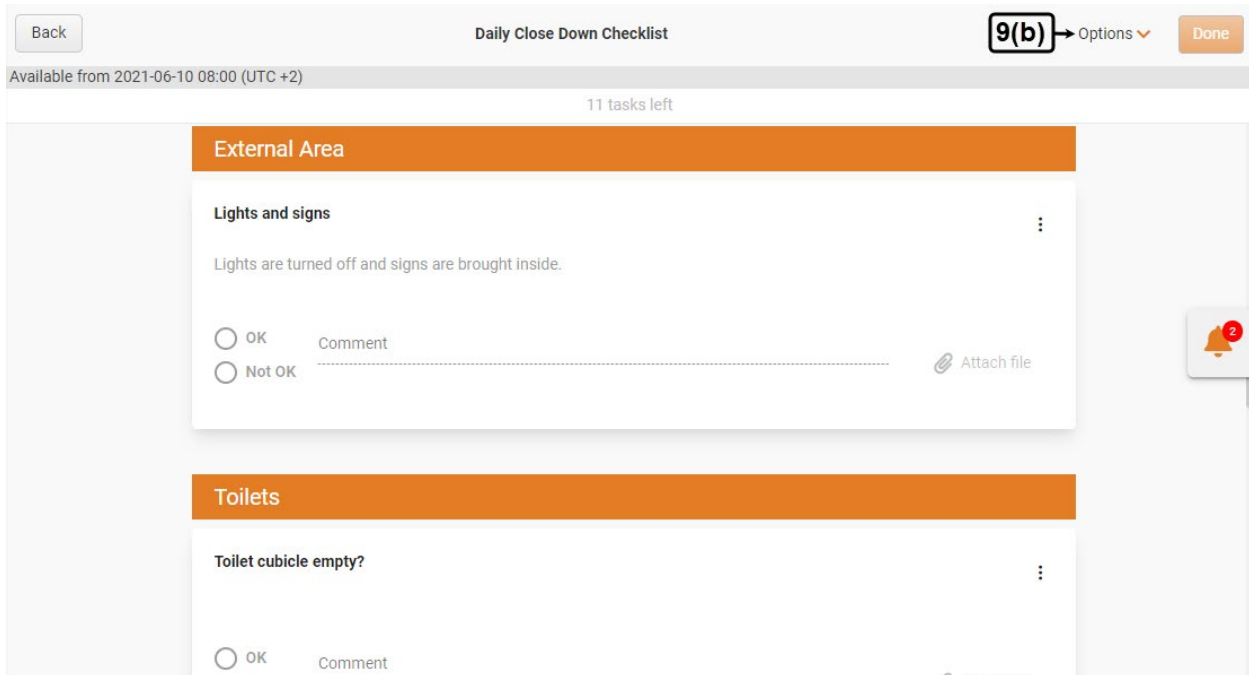
View Start and Due Date/Time of a Checklist

7. You can view the **start** and **due date/time** of a checklist next to its name in its relevant category on the **Checklists** page.

Review Checkpoints of a Checklist

You can review all the checkpoints of a saved checklist and their requirements on the selected **Checklist** page.

8. Click the name of the checklist in its relevant category on the **Checklists** page to open the selected **Checklist** page.

On the selected Checklist page, you can complete the checklist on this page as well if it is available to complete. See the User Guide for **Complete a Checklist**

Access Options Menu of a Checklist

You can view and use different options available for a saved checklist by opening its **Options** menu.

9(a). Click the **3-dots ellipsis** icon next to a checklist's name under the **Options** heading in its relevant category on the **Checklists** page to open its options menu.

9(b). You can also open the options menu of a checklist by clicking the **Options** button in the header bar on the selected **Checklist** page.
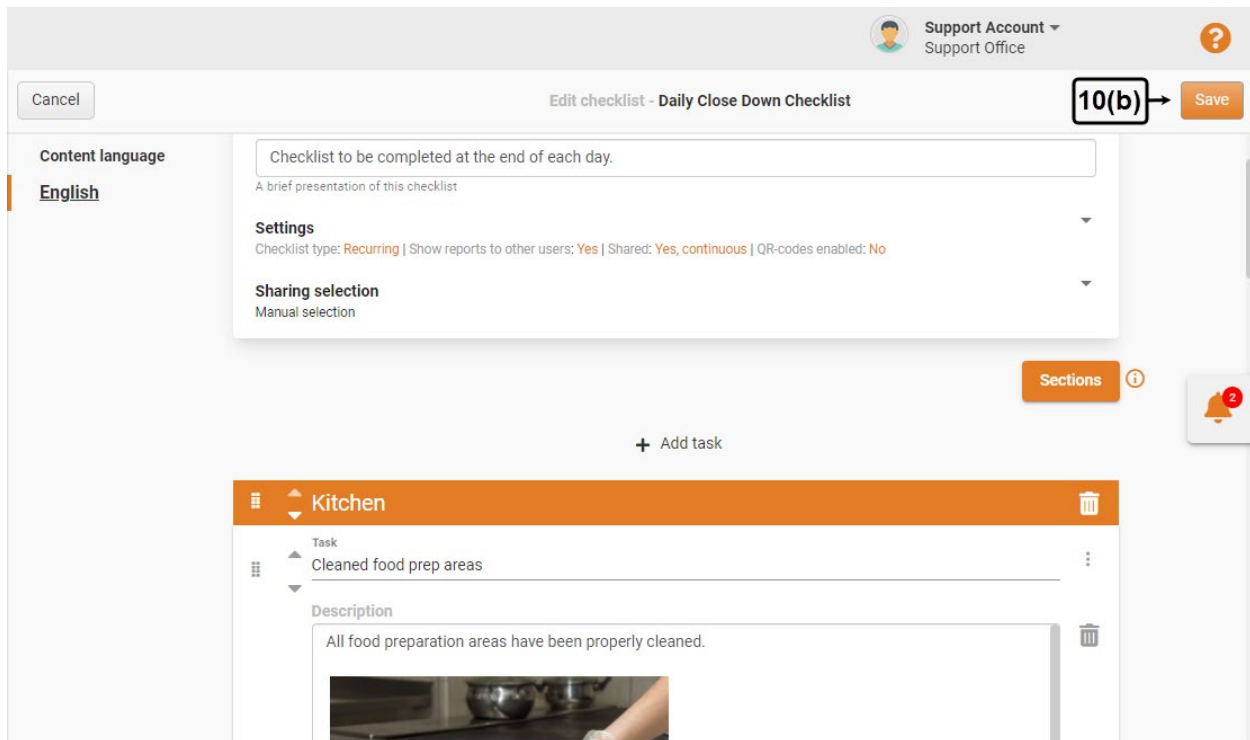
Edit a Checklist

10. Click the **Edit checklist** button from the **Options** menu of the selected checklist to edit its settings, sharing selection or checkpoints.

This will open the **Edit checklist** tab of the selected checklist.

10(a). On the **Edit Checklist** page, update the settings and checkpoints you want to edit in the selected checklist.

10(b). Click the **Save** button in the top-right corner of the **Edit checklist** page to save all the changes you have made.

The system will save the updated checklist and share it with your selected colleagues in the selected units.

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Review a Checklist Report

11. You can view the complete statistical report of the selected checklist by clicking the **View reports** button from its **options menu**. See the User Guide for **Checklist Reports**

Note: View reports option will be shown only in the **options menu** of a checklist if at least one response has been submitted to it. If no user has responded to the selected checklist yet, then there will be no option to view its report in its options menu.

Furthermore, you will find the **View reports** option in the **options** menu of checklists created by your colleagues only if they have opted to **show reports to other users** in the settings of the selected checklists.

Save a Checklist as a Template

12. You can save the selected checklist as a template by clicking the **Save as template** button from its options menu. See the User Guide for **Checklist Templates**

Disable/Enable Mobile Notifications

13. You can disable mobile notifications for the selected checklists by **selecting** the **Disable mobile notifications** option from its options menu.

Note: This is a "personal" setting, and will only affect your user profile. The system will not send notification about this checklist via the **Chainformation** mobile app to you. Other will still get notifications.

However, you can enable mobile notifications for the selected checklist again by **deselecting** the **Disable mobile notifications** option from its options menu.

Mark a Checklist as Not Applicable

14. You can mark a checklist not applicable for your unit by **selecting** the **Not applicable** option from its options menu.

When you mark a checklist as not applicable for your unit, the system will remove it from the **to-do** list of all the selected users associated with your unit. However, it will still be shown to you and your selected colleagues in its relevant category on the **Checklists** page.

You can mark a not applicable checklist as applicable again by **deselecting** the **Not applicable** option from its options menu.

Note: You can also mark individual checkpoints not applicable for your unit instead of a complete checklist when you are responding to these checkpoints on the selected **Checklist** page.

However, you can do so only on the **Chainformation** website platform and there is no option to mark checkpoints not applicable individually in the **Chainformation** mobile app. See the User Guide for **Complete a Checklist on Chainformation Website**

Delete Responses to a Checklist
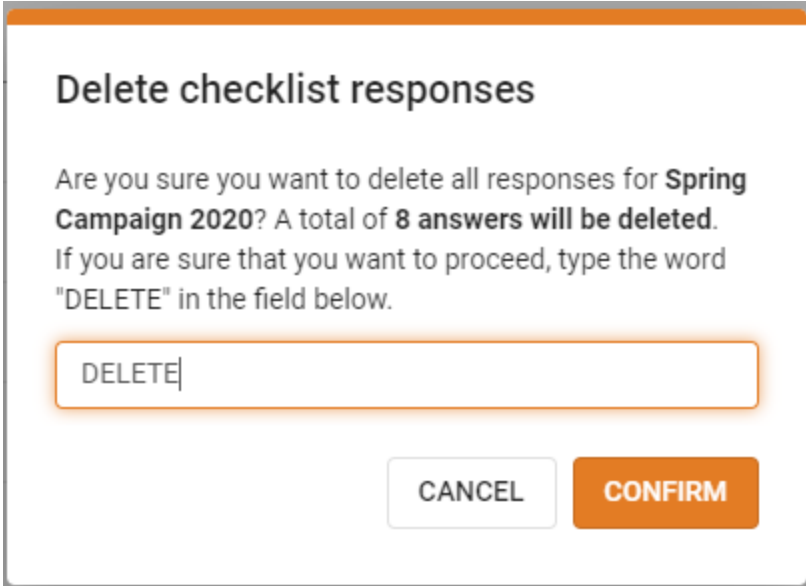
The most common reason why you need to delete responses for an existing checklist is because you need to change the schedule/time settings. You CAN NOT change a schedule while there is historical data saved.

Remember, you cannot restore responses to a checklist and their relevant information in the **Reports** section of the **Checklists** module once you have deleted them. Therefore, make sure you have saved any important data related to responses to a checklist before deleting them.

Now, follow the navigation steps demonstrated below to delete responses to a checkpoint if you really need to do so.

15. Click the **Delete responses** button from the options menu of the checklist whose answers you want to delete.

15(a). Type the word **DELETE** in the field shown on the screen and click the **CONFIRM** button to proceed further.

Delete checklist responses

Are you sure you want to delete all responses for **Spring Campaign 2020**? A total of **8 answers will be deleted.** If you are sure that you want to proceed, type the word "DELETE" in the field below.

DELETE

CANCEL   CONFIRM

15(b). Enter the result of the question shown on the screen in the given field.

15(c). Click the **DELETE RESPONSES** button to delete all the responses to the selected checklist.

The system will delete all the responses submitted to the selected checklist and you can never recover this information.
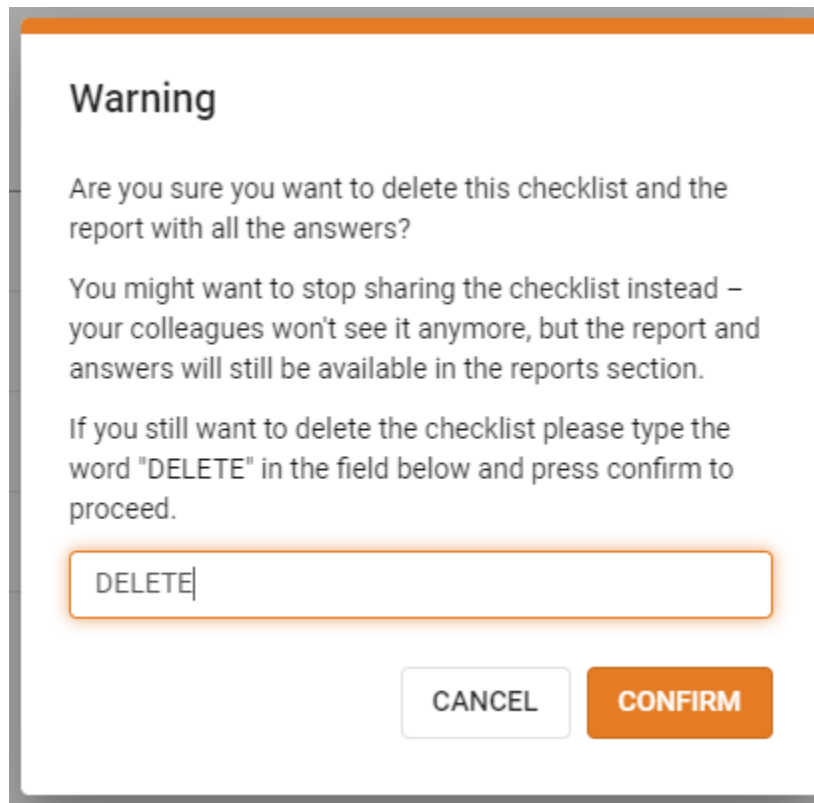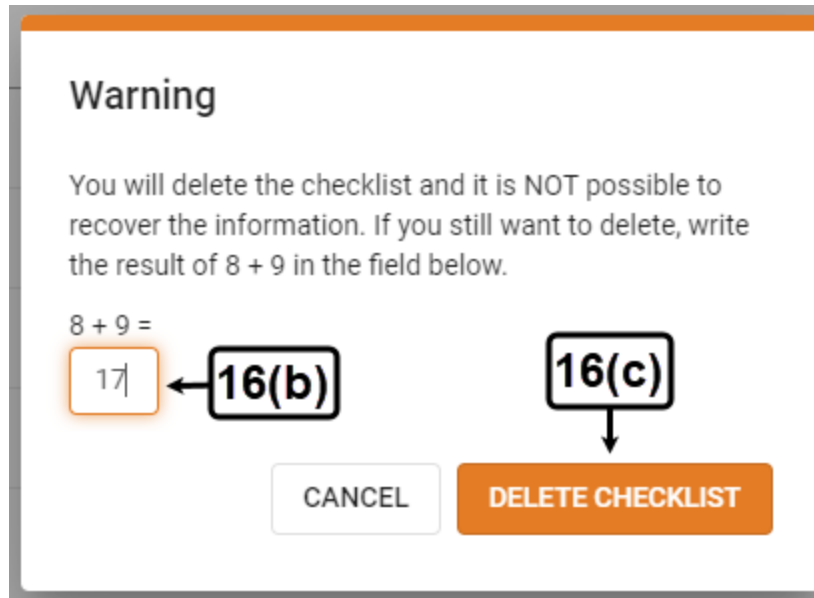
Delete a Checklist

Remember, there is no **Trash** folder for the **Checklists** module on the **Chainformation** platform from where you can restore a deleted checklist and its relevant data. Therefore, when you delete a checklist, the system will delete this checklist, responses submitted to it and its report permanently.

You might want to stop sharing the checklist by editing its sharing settings instead of deleting it. See the User Guide for **Edit a Checklist**

Now, follow the navigation steps demonstrated below to delete a checklist and its report if you really need to do so.

16. Click the **Delete checklist** button from the options menu of the checklist you want to delete.

16(a). Type the word **DELETE** in the field shown on the screen and click the **CONFIRM** button to proceed further.

16(b). Enter the result of the question shown on the screen in the given field.

16(c). Click the **DELETE CHECKLIST** button to delete the selected checklist and its report.

The system will delete the selected checklist, all the responses submitted to it and its report permanently and you can never recover this information.

Manage Checklist QR-Codes

Chainformation allows you to generate QR-codes and use these codes to require physical scanning for selected checkpoints. You must have **enabled QR-codes** in the settings of a checklist to **require QR-scanning** for the completion of its specific tasks. If you opt to do so, then your selected colleagues will have to scan a QR-code before they can complete these checkpoints. In other words, they cannot mark such a checkpoint as **OK** without scanning a specific QR-code. See the User Guide for **Create a New Checklist**

If you have not **enabled QR-codes** for a checklist while creating it, you can enable them later as well by editing its settings. Likewise, you can also edit options for selected tasks of a published checklist and opt to **require QR-scanning** for the completion of these checkpoints. See the User Guide for **Edit a Checklist**

In this section, we will learn how to generate and export QR-codes for selected checkpoints of a checklist.

Once you have **enabled QR-codes** in **other settings** of a checklist on the **New checklist** or **Edit checklist** page, the system will automatically generate QR-codes for each checkpoint of the selected checklist. Likewise, a new QR-code will be automatically generated for every new task that you will add to the checklist.

Now, follow the navigation steps demonstrated below to download and print QR-codes for a checklist.
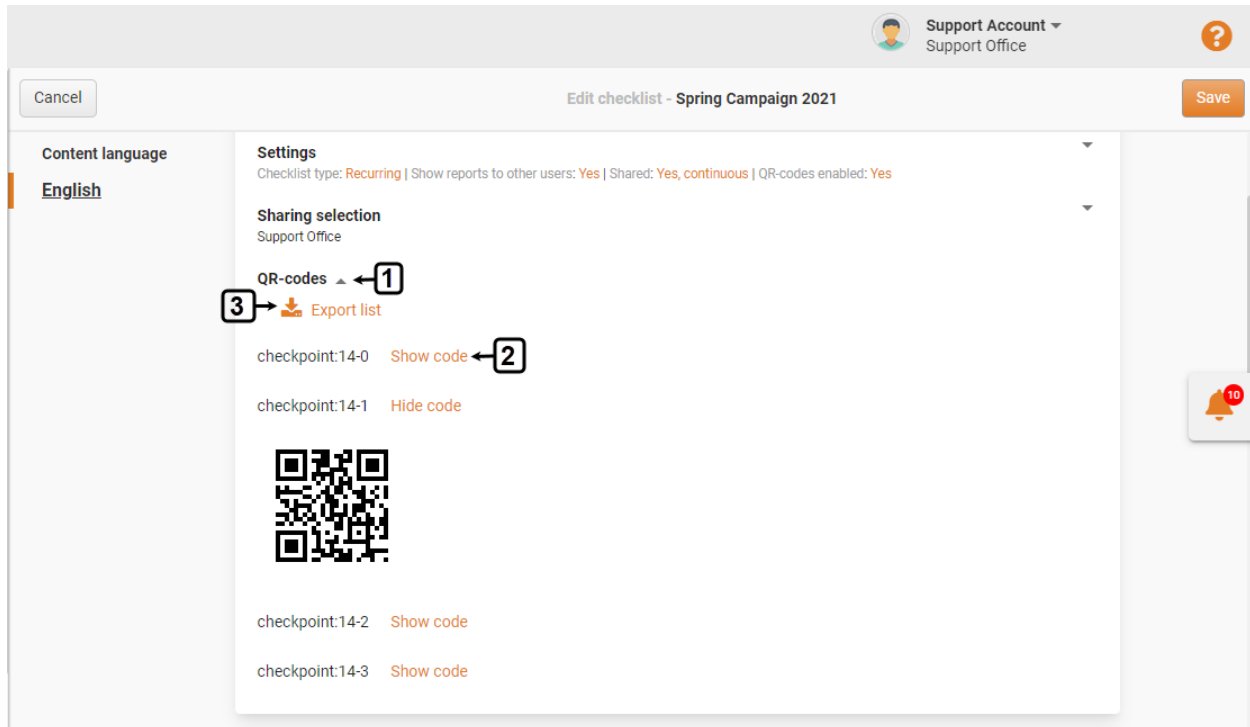
1. You can find these codes under the **QR-codes** heading right below the **Sharing selection** section on the **New checklist** or **Edit checklist** page.

2. Click the **Show code** button next to a code name to view the code.

3. Click the **Export list** button to download the list of all the codes generated by the system for the selected checklist.

4. Print these codes and distribute them to the relevant sites and locations where your selected colleagues can scan them before completing specific checkpoints.

Complete a Checklist

Remember, when you complete a checklist on the **Chainformation** platform, you are representing your Unit. The system will save your response to the different checkpoints of the selected checklist as the response of your unit to these checkpoints.

You can review statistical details of your response to a checklist and the response of your colleagues in other units on the **Checklist report** page of the selected checklist. See the User Guide for **Checklist Reports**

Now, we will learn how to complete a checklist in the **Chainformation** mobile app and the **Chainformation** website platform in the two different sections of this manual.

Complete a Checklist in Chainformation Mobile App

There are two ways to open checklists that are available to complete in the **Chainformation** mobile app.

1. You can open a checklist to complete from your **to-do** list in the **Chainformation** mobile app.

Remember, you will find only **current checklists** in your **to-do** list and the checklists that have passed their **due time** won't show here.

Follow the navigation steps demonstrated below to open a checklist from your **to-do** list on the **Chainformation** mobile app.

1(a). Click the **To-do** button in the header menu of **Chainformation** app's home screen to open your to-do list.

1(b). Click the **Checklists** button in your to-do list to open the **Checklists** tab that contains all the **current checklists**.

1(c). On the **Checklists** tab, open the checklists that you want to complete by clicking its name from the list of checklists available here.
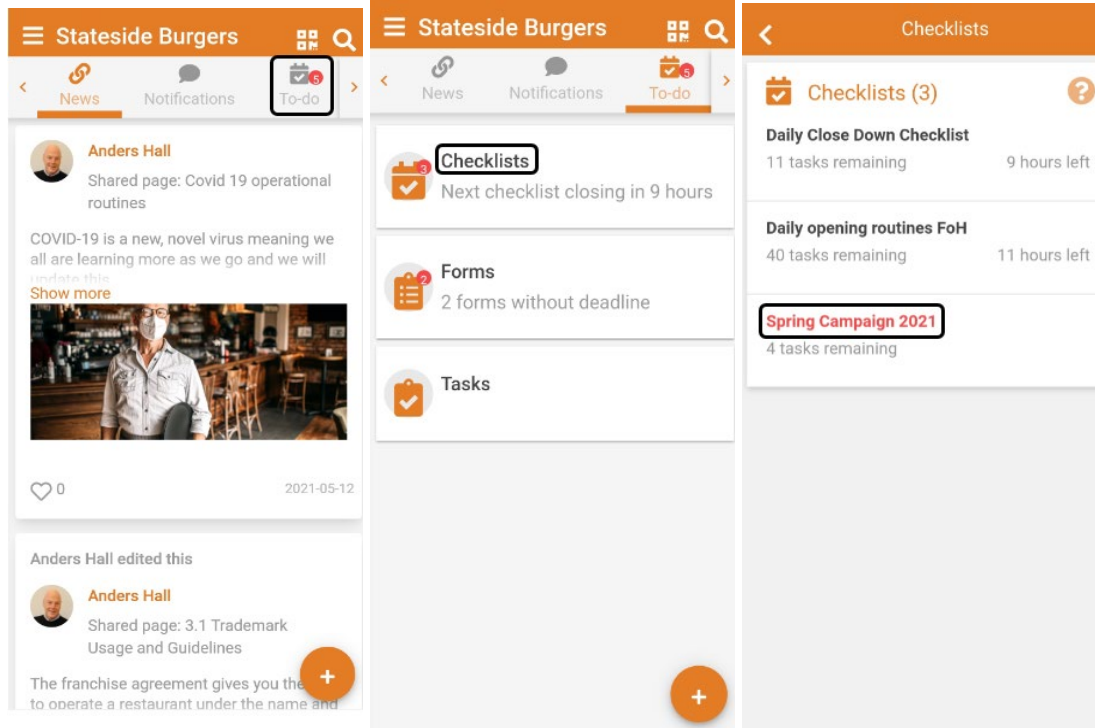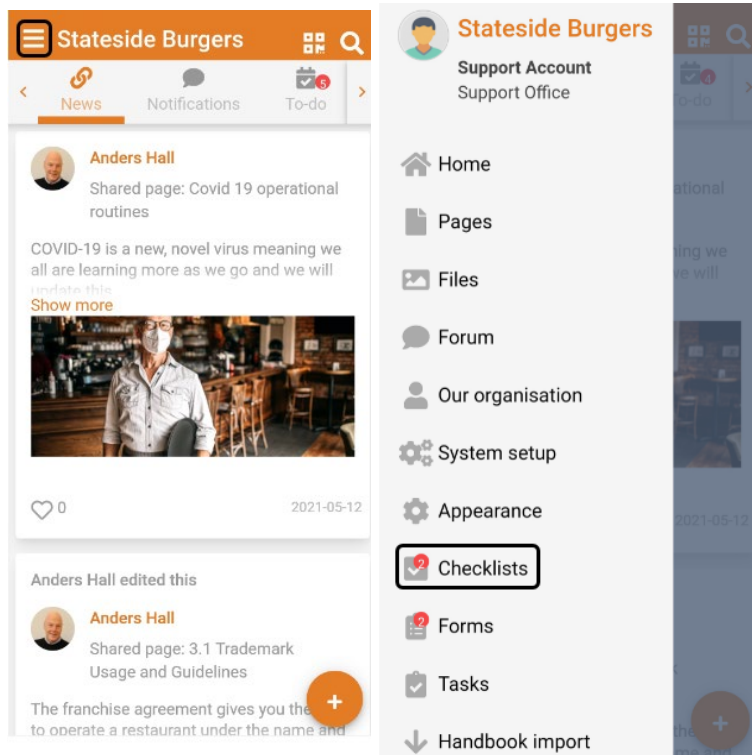
2. You can also open a checklist that you want to complete by clicking its name in its relevant category on the **Checklists** tab of the **Checklists** page. In fact, if a checklist has passed its **due date/time** and you still want to complete it then you can find such checklists only in the **Late checklists** tab of the **Checklists** page. These late checklists will be no longer available in your **to-do** list.

Follow the navigation steps demonstrated below to open a checklist from the **Checklists** page on the **Chainformation** mobile app.

2(a). Open your profile menu by clicking the **hamburger** icon in the top-left corner of your mobile screen.

2(b). Click the **Checklists** button in your profile menu to open the **Checklists** page that contains all the saved checklists in their relevant categories.

By default, you will be redirected to the **Current checklists** tab of the **Checklists** page where you will find all the checklists that are currently available to complete.

2(c). If you want to open a checklist that has passed its **due date/time** and is no more available in the **Current checklists tab**, then click the **Filter** icon above the header menu of the **Checklists** page.

2(d). Select the **Late checklists** option from the filter menu shown on your mobile screen.

2(e). Click the **Tick** icon in the top-right corner of the page to apply your selected filter.

This will open the **Late checklists** tab that contains all the checklists that have passed their **due date/time**.

2(f). Now, open the checklist that you want to complete by clicking its name on either **current** or **late checklists** tab.
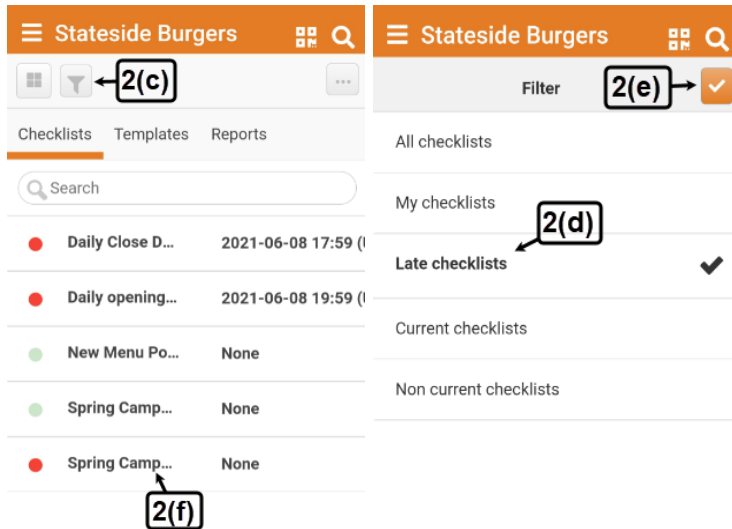
3. On the selected **Checklist** page, complete all the checkpoints by marking them as **OK** or **Not OK**.

4. You can view details and history log of a checkpoint by clicking its **name**, **description** or **View details** button under its name and description on the selected **Checklist** page.

5. You can view your recent task history under the **Checkpoint log** heading on the details tab of a checkpoint.
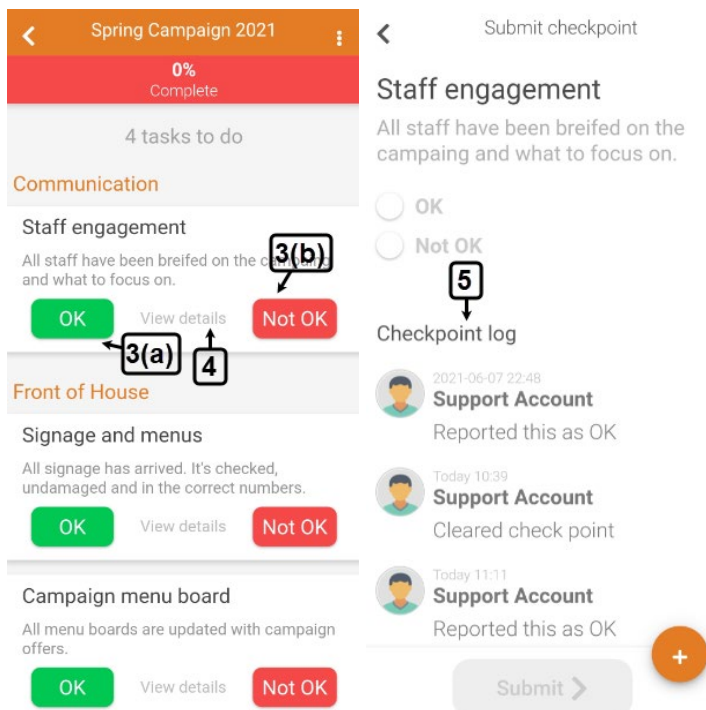
6. You will have to scan the **QR-code** of a checkpoint before you can mark it as **OK** or **Not OK** if the **QR-code is required** to complete this checkpoint. <u>See the User Guide for **Checklist QR-Codes**</u>

7. You will have to leave a comment to complete a checkpoint if the **comment is mandatory** to mark the checkpoint as **OK**, **Not OK** or both.

8. You will have to add a relevant image or take a photo to complete a checkpoint if the **attachment is mandatory** to mark the checkpoint as **OK**, **Not OK** or both.
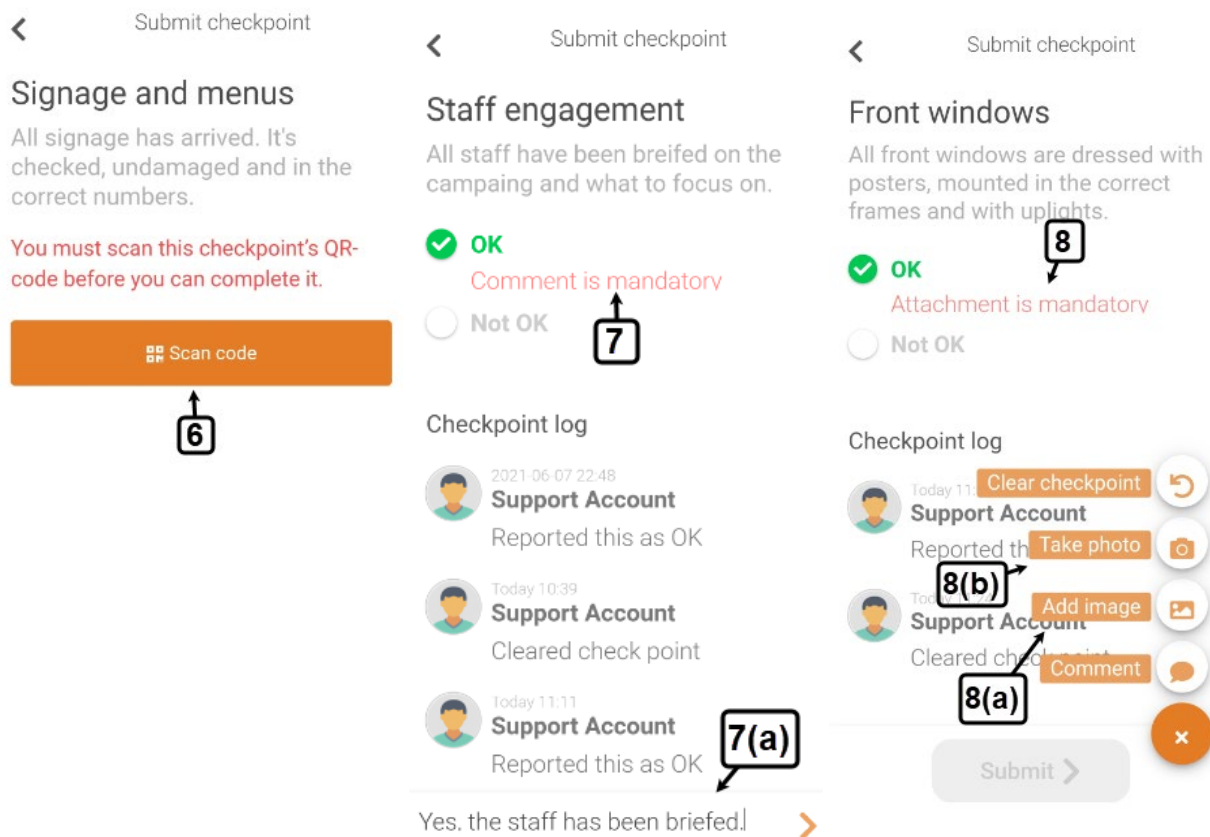
9. Once you have entered all the requirements to complete a task, click the **Submit** button to complete a checkpoint and submit it to the system.

You can edit your answer submitted for a checkpoint from its options menu.

10. Click the **(+)** icon in the bottom right corner of a **checkpoint** page to open its options menu.

11. Click the **Edit comment** option to update your comment on the selected checkpoint.

12. Click the **Take photo** button to take a new photo for the selected checkpoint.

13. Click the **Replace image** to upload a new photo from your mobile phone and replace it with the existing image attached to the selected checkpoint.

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14. You can clear your answer to a checkpoint by clicking the **Clear checkpoint** option in the selected checkpoint menu.

However, you can submit your answer to a cleared checkpoint again after completing all of its requirements.

15. You can see how many tasks you have completed so far and how many left for a checklist in the **progress bar** at the top of the selected checklist page.

16. Click the **3-dots ellipsis** icon on the selected **checklist** page to open its options page where you can mark this checklist as **applicable/not applicable** and view its **statistical report**.
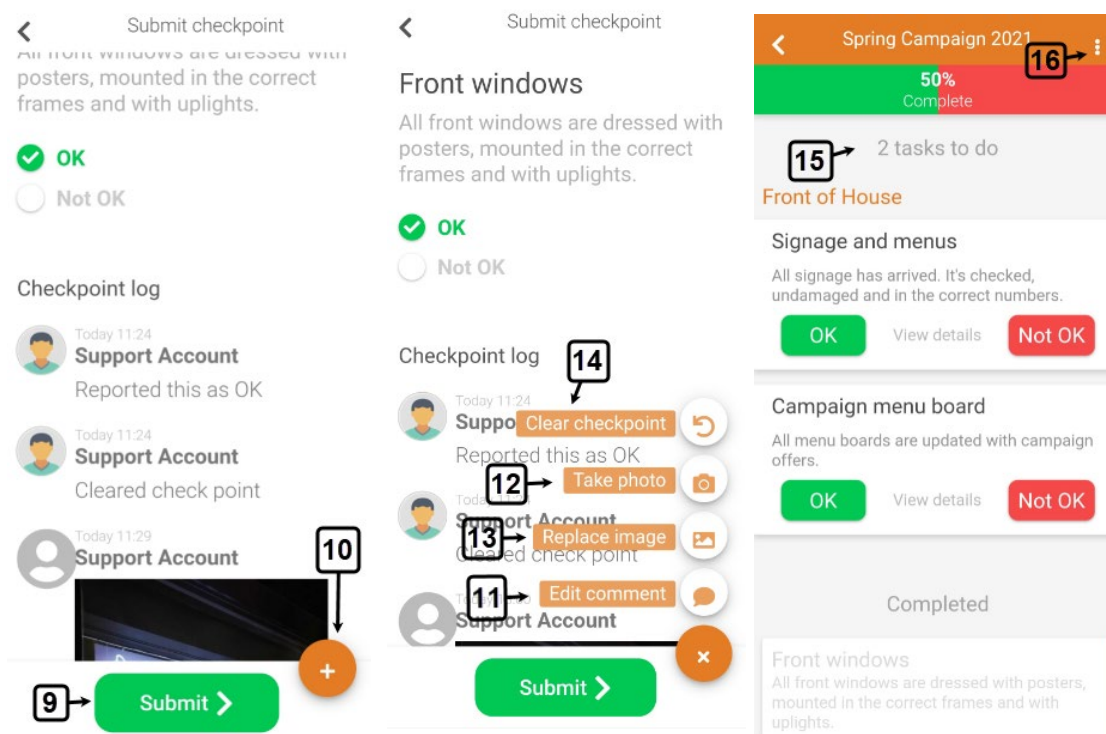
17. On the **Checklist options** page, **deselect** the **Checklist is applicable** option if the selected checklist is not applicable for your unit. See the User Guide for **Not Applicable Checklists**

You can mark a not applicable checklist as applicable again by **selecting** the **Checklist is applicable** option on the **Checklist options** page**.**

Note: You can also mark individual checkpoints not applicable for your unit instead of a complete checklist. However, you can do so only on the **Chainformation** website platform. See the User Guide for **Complete a Checklist on Chainformation Website**

18. Click the **View checklist report** button on the **Checklist options** page to view the complete statistical report of the selected checklist. See the User Guide for **Checklist Reports**
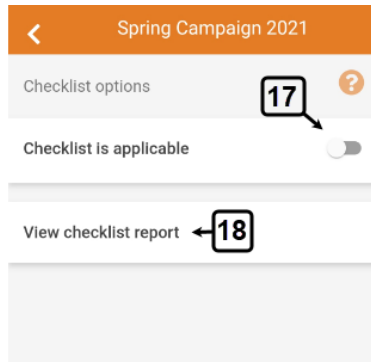
Complete a Checklist on Chainformation Website

There are two ways to open checklists that are available to complete on the **Chainformation** website platform.

1. You can open a checklist to complete from your **to-do** list on the **Chainformation** website platform.

Remember, you will find only current checklists in your to-do list and the checklists that have passed their due time won't show here.

Follow the navigation steps demonstrated below to open a checklist from your **to-do** list.

1(a). Click the **Notification** icon on the home page or any other page of the **Chainformation** platform.

1(b). By default, you will be redirected to the **Checklists** tab of your **to-do** list. If not, then click the **Checklists** button in the header menu of your **to-do** list to open the list of checklists that are available to complete here.

1(c). On the **Checklists** tab, open the checklist that you want to complete by clicking its name from the list of checklists available in your **to-do** list.

2. You can also open a checklist that you want to complete by clicking its name in its relevant category on the **Checklists** tab of the **Checklists** page. See the User Guide for **Review Saved Checklists**

In fact, if a checklist has passed its **due date/time** and you still want to complete it then you can find such checklists only in the **Late checklists** tab of the **Checklists** page. These late checklists will be no longer available in your **to-do** list.

3. On the selected **Checklists** page, complete all the checkpoints of the checklist.

Follow the navigations demonstrated below to complete checkpoints of a checklist.

4. You will have to leave a comment to complete a checkpoint if the **comment is mandatory** to mark the checkpoint as **OK**, **Not OK** or both.

5. You will have to attach at least one file with your answer to a checkpoint if the **attachment is mandatory** to mark it as **OK**, **Not OK** or both.

5(a). Click the **Attach file** button next to the comment section of a checkpoint to upload a file from your computer or insert a file from the **Files** module. See the User Guide for **Files**

5(b). Click the **Cross** icon in the top-right corner of an attached file to remove it from the selected checkpoint (if required).

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6. You will have to scan the **QR-code** of a checkpoint before you can mark it as **OK** or **Not OK** if the **QR-code is required** to complete this checkpoint. See the User Guide for **Checklist QR-Codes**

Remember, you cannot scan a checkpoint's QR-code on the **Chainformation** website platform. You must use the **Chainformation** mobile app to answer a checkpoint that requires a QR-code to complete.

7. You can open a checklist's options menu by clicking the **3-dots ellipsis** icon next to its name.

8. You can remove your comment on a checkpoint by clicking the **Remove comment** button in its options menu.

9. You can mark a checkpoint as not applicable for your unit by **selecting** the **Not applicable** option in its options menu.

You can mark a not applicable checkpoint as applicable again by **deselecting** the **Not applicable** option in its options menu.

10. You can clear your answer to a checkpoint by clicking the **Clear checkpoint** button in its options menu.

However, you can submit your answer to a cleared checkpoint again after completing all of its requirements.

11. You can review the time of your last answer to a checkpoint in its bottom-right corner if you have answered this checkpoint before.

12. You can see how many tasks you have completed so far and how many left for a checklist in the **progress bar** at the top of the selected checklist page.

13. Once you have completed all the checkpoints, click the **Done** button in the top-right corner of the selected **Checklist** page to submit your answer.

Note: You can also submit your answer without completing all of its checkpoints and complete the pending checkpoints later.

Manage Checklist Templates

Remember, when you use a pre-formatted template to create a new checklist, then the system will automatically load settings and checkpoints from the selected template to the new checklist. However, you can still change these settings and customize the pre-loaded checkpoints according to your requirements on the **New checklist** page. See the User Guide for **Create a New Checklist**

In this section, we will discuss the following features of the **Templates** tab of the **Checklists** page.

- ➢ Save New Checklist Templates
    - o Create a New Template on the Templates Tab
    - o Save a Checklist Settings as a New Template
    - o Save a Checklist as a Template on the Checklists Page
- ➢ Review Saved Templates
- ➢ Review Checkpoints of a Template
- ➢ Edit a Checklist Template
- ➢ Delete a Checklist Template

Save New Checklist Templates

There are multiple ways to save new checklist templates on the **Chainformation** platform. Here is a brief summary of each method to create a new checklist template.
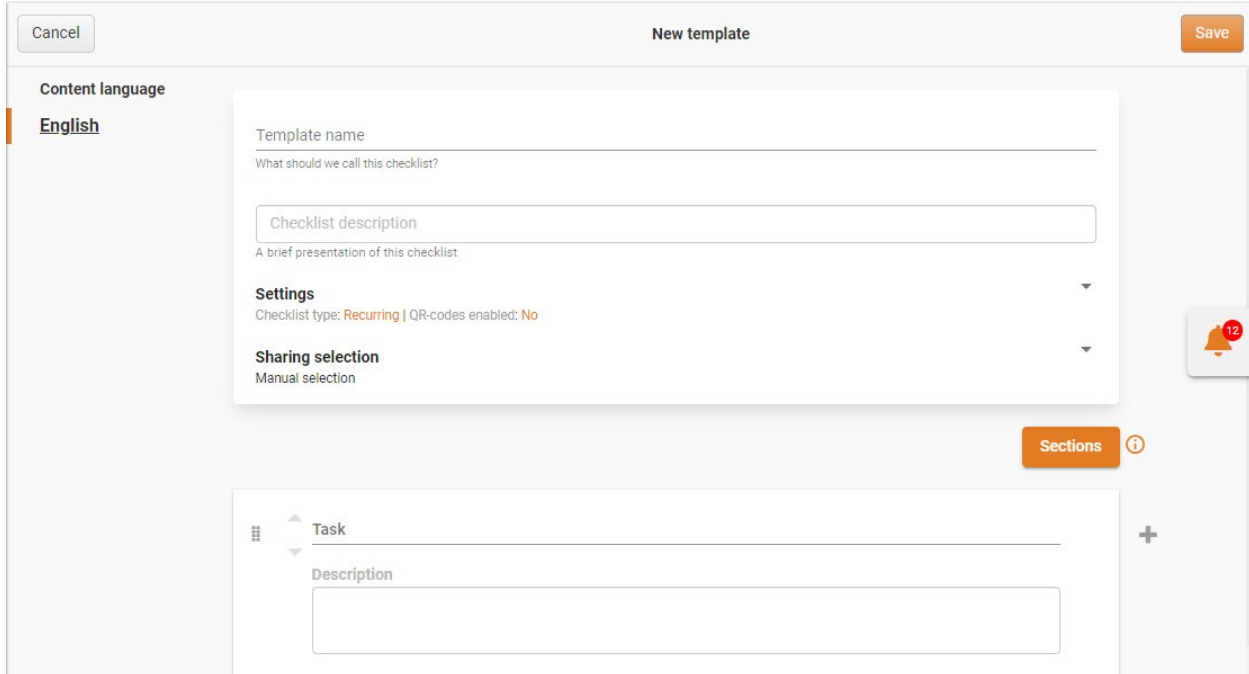
Create a New Template on the Templates Tab

When you access the **Checklists** module from your profile menu, by default, you will be redirected to the **Checklists** tab.

1. Click the **Templates** button in the header menu of the **Checklists** page to open the **Templates** tab.

2. Click the **(+)** icon in the top-right corner of the **Templates** page to create a new checklist template.
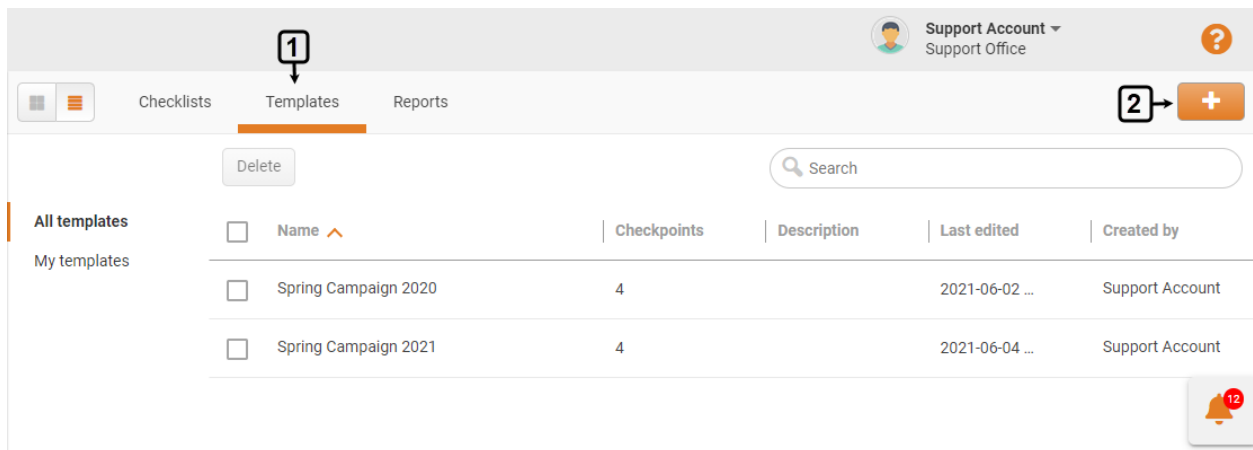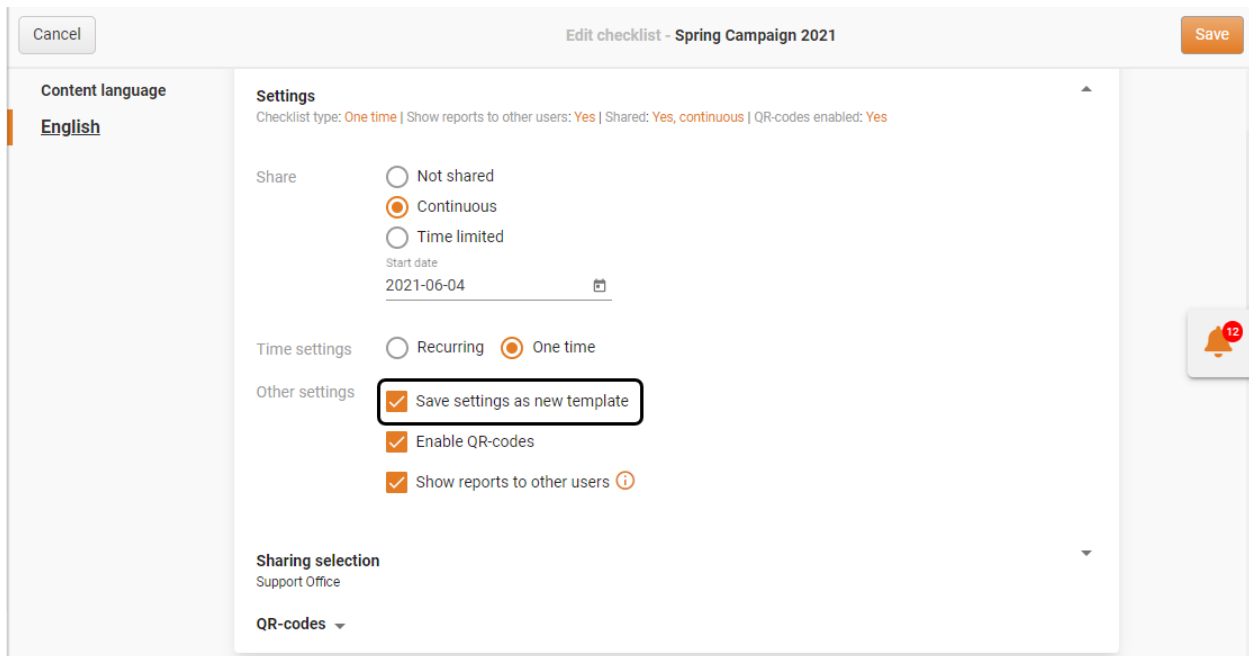
This will open the **New template** page where you can set up the settings and checkpoints for your new template following the navigation steps as described in the user guide for how to create a new checklist. See the User Guide for **Create a New Checklist**

Save a Checklist Settings as a New Template

You can save a new checklist as a new template as well by checking the checkbox next to the **Save settings as a new template** option in its **settings** on the **New checklist** page. See the User Guide for **Create a New Checklist**

Likewise, you can also save a published checklist as a template by checking the checkbox next to the **Save settings as a new template** option in its **settings** on the **Edit checklist** page. See the User Guide for **Edit a New Checklist**

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Important: When you opt to save a checklist settings and checkpoints as a new template on the **New checklist** or **Edit checklist** page, the system will not straight away save it in the list of templates on the **Templates** page. Instead, a template from the **New checklist** or **Edit checklist** page will be effective only if you have saved changes on these pages by clicking the **Save** button in the top right corner of the **New checklist** and **Edit checklist** pages.

Save a Checklist as a Template on the Checklists Page

You can also save a published checklist as a template directly from the **Checklists** page, without opening the **Edit checklist** tab.

Follow the navigation demonstrated below to save a checklist as a template on the **Checklists** page

1. Navigate to the checklist you want to save as a template in its relevant category on the **Checklists** page following the navigation steps demonstrated in the previous section. See the User Guide for **Review Saved Checklists**

2. Click the **3-dots ellipsis** icon next to the selected checklist name under the **Options** heading to open its options menu.

3. Click the **Save as template** button from the dropdown menu shown on the screen to save the selected checklist as a template.

You can find the template from the selected checklist in the list of templates on the **Templates** page. See the User Guide for **Review Saved Templates**

Review Saved Templates

Once you have opened the **Templates** page on the **Checklists** module as demonstrated in the previous section, you can view different checklist templates under the following categories.

1. All templates

By default, you will be redirected to the All templates tab where you can find all the checklist templates that have been either created by you or your colleagues have shared them with you.

2. My templates

This tab contains only those checklist templates that have been created by you.

Search a Template

3. You can also use the **Search** field to find a checklist template based on any of the available data/information. <u>See the User Guide for **Search**</u>

Review Checkpoints of a Template

You can review all the checkpoints of a saved checklist template and their requirements on the selected **Template** page.

4. Click the name of the template in its relevant category on the **Templates** tab of the **Checklists** page to open the selected **Template** page.

This will open the selected **Template** page where you can review its checkpoints and their requirements.
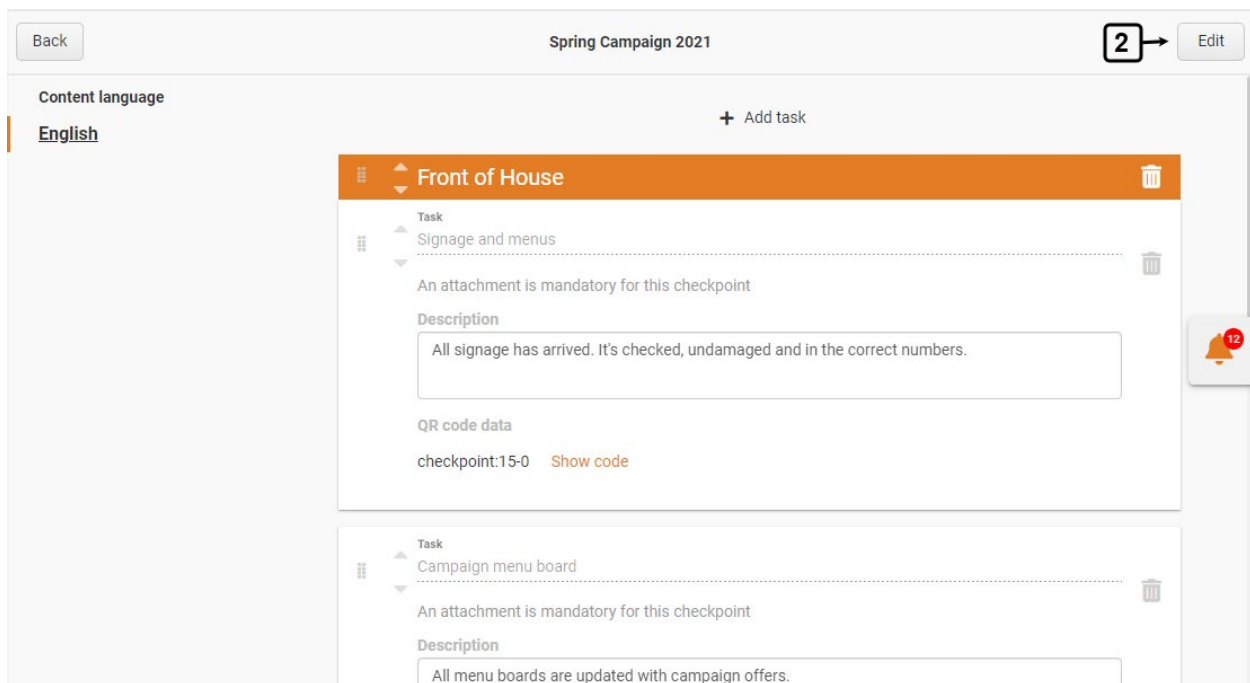
On the selected **Template** page, you can also edit its settings and checkpoints by opening the **Edit template** tab. See the User Guide for **Edit a Checklist Template**

Edit a Checklist Template

Follow the navigation demonstrated below to edit settings, sharing selection or checkpoints of a checklist template.

1. Open the **Template** page you want to edit following the navigation steps as demonstrated in the previous section. See the User Guide for **Review Saved Checklist Templates**

2. Click the **Edit** button in the top-right corner of the selected **Template** page to open the **Edit template** tab**.**

3. On the **Edit template** page, update the settings and checkpoints you want to edit in the selected template.

4. Click the **Save** button in the top-right corner of the **Edit template** page to save all the changes you have made.

NOTE: The system will save the updated template but changes made to a template will NOT affect already created and published checklists using this template.

If you want to edit the checklists you have created using the selected template too, then you will have to edit them manually.
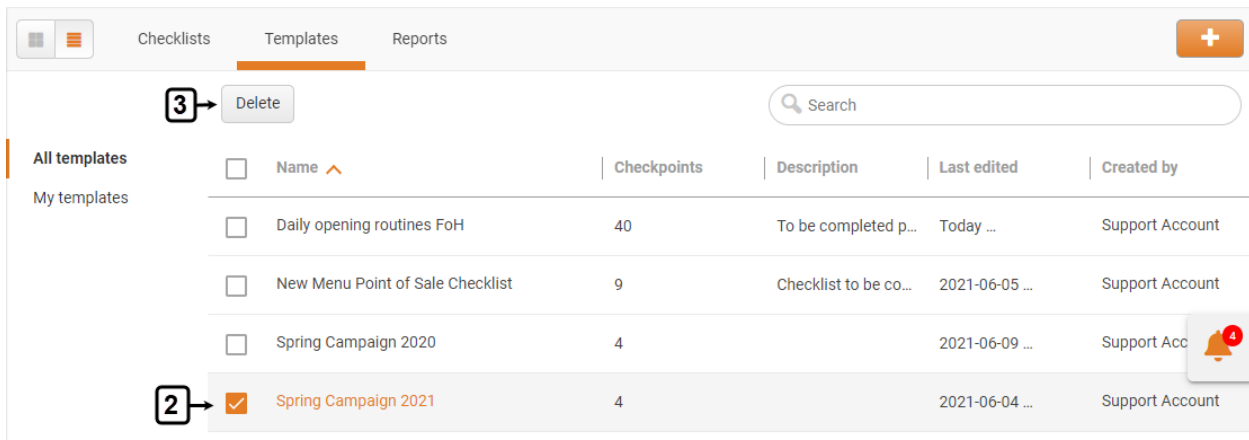
Delete a Checklist Template

Remember, there is no **Trash** folder for the **Templates** section of the **Checklists** module on the **Chainformation** platform from where you can restore a deleted checklist template. Therefore, when you delete a checklist template, the system will delete it permanently.

Deleting a template will NOT affect already published checklists using the deleted template.

You might want to stop sharing the template by editing its sharing settings instead of deleting it. See the User Guide for **Edit a Checklist Template**

Now, follow the navigation steps demonstrated below to delete a checklist template if you really need to do so.

1. Navigate to the template you want to delete in its relevant category on the **Templates** tab of the **Checklists** page. See the User Guide for **Review Saved Checklist Templates**

2. **Check** the **checkbox** next to the name of the template you want to delete.

3. Click the **Delete** button above the list of templates.

4. Click the "**DELETE**" button in the pop-up message shown on the screen to delete the selected template.

Warning

Are you sure you want to delete selected page template?

CANCEL   DELETE
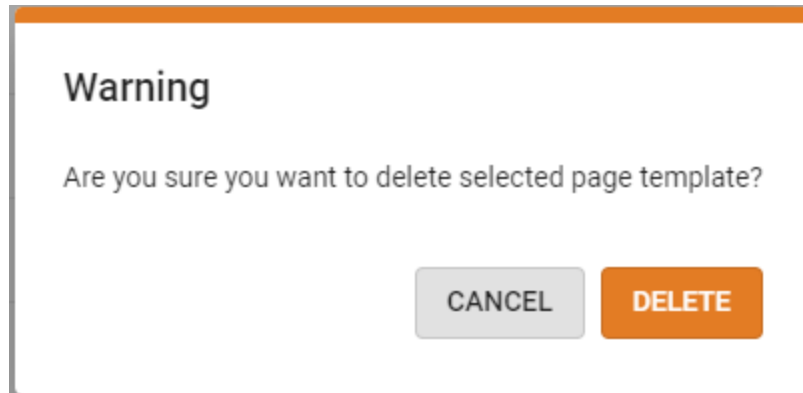
The system will delete the selected checklist template and you can never restore it.

However, deleting a template will not delete the checklists you have created using this template and you can still find these checklists in their relevant categories on the Templates of the Checklists page. See the User Guide for **Review Saved Checklists**

Manage Checklist Reports

On the **Reports** tab of the **Checklists** page, you can **view** and **manage** reports of checklists created by you and your colleagues.

In this section, we will discuss the following features of the **Reports** section of the **Checklists** module.

- ➢ View Saved Reports

- ➢ Review Latest Status of a Checklist

- ➢ Review a Detailed Report

View Saved Reports

Note: You can find reports of only those checklists in the **Reports** tab for which you have selected the **Continuous** or **Time limited** option in their **Share** settings. There will be no report available for a checklist that you have **not shared** with your colleague.

You can edit **share settings** of such checklists and select either the **Continuous** or **Time limited** option to view their reports. See the User Guide for **Edit a Checklists**

Now, follow the navigation steps demonstrated below to see available checklist reports on the **Reports** tab of the **Checklists** page

Once you have opened the **Checklists** page as demonstrated in the previous section, click the **Reports** button in the header menu of the page to open the **Reports** tab.

On the **Reports** page, you can view different reports under the following categories.
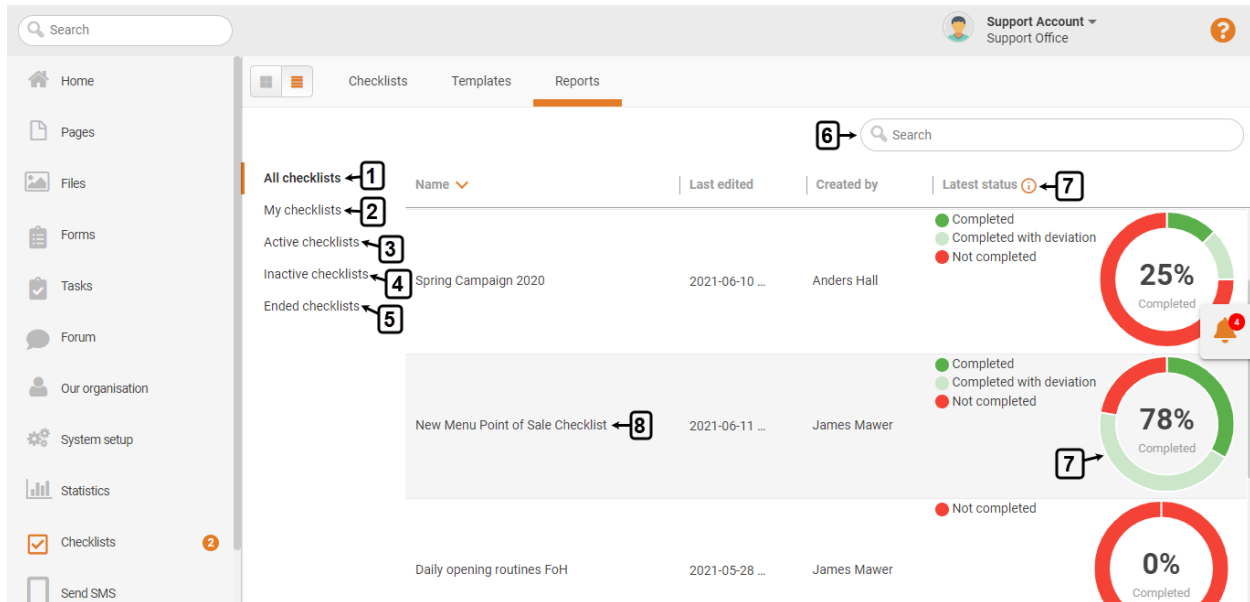
1. All checklists

By default, you will be redirected to the **All checklists** tab of the **Reports** page. This tab contains reports for all the checklists created by you and reports for the checklists your colleagues have shared with you.

Note: You can see reports for the checklists created by your colleagues only if the checklist creator has allowed you and other selected users to see their reports.

2. My checklists

In the **My checklists** tab of the **Reports** page, you will find reports for the checklists created by you.

3. Active checklists

In the **Active checklists** tab of the **Reports** page, you will find reports for the checklists that are currently active.

By **active checklists**, we mean the checklists that are currently available to complete i.e. **current checklists** or the recurring checklists that will be available to complete soon i.e. **non-current checklists**. You can also find those **late checklists** in the **active checklists** tab that have passed their **due date/time** but are still available to complete. See the User Guide for **Review Saved Checklists**

4. Inactive checklists

In the **Inactive checklists** tab of the **Reports** page, you will find reports for the checklists that are currently inactive.

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5. Ended checklists

In the **Ended checklists** tab of the **Reports** page, you will find reports for those **time-limited checklists** that have passed their **end date** and are not available to complete now.

Search a Report

6. You can also use the **Search** field to find the report for a checklist based on any of the available data/information. See the User Guide for **Search**

Review Latest Status of a Checklist

7. You can view a brief statistical summary of a checklist in the form of a pie chart under the **Latest status** heading next to its name in its relevant category on the **Reports** page.

The pie chart under the **Latest status** heading shows the proportional response of the selected users in the selected units to the respective checklist in a specific period. See the User Guide for **Review a Detailed Checklist Report**

**Note:** The results under the **Latest status** heading are shown from the **start date** of an **active checklist** to the date on which you are visiting the checklist report i.e. today. However, if the selected checklist is currently inactive, then the pie chart will show the results from the start date of the selected checklist to the date when it was last active i.e. the last response was submitted to it.

Chainformation — Stick to your concept

Review a Detailed Checklist Report

8. You can review the complete statistical report of a checklist by clicking its name in its relevant category on the **Reports** page.

9. You can also open the **Checklist report** page of a checklist from its **options menu** (if applicable). See the User Guide for **Review Saved Checklists**

On the **Checklist report** page of the selected checklist, you can review its latest status and details of ok checkpoints as well as deviations.
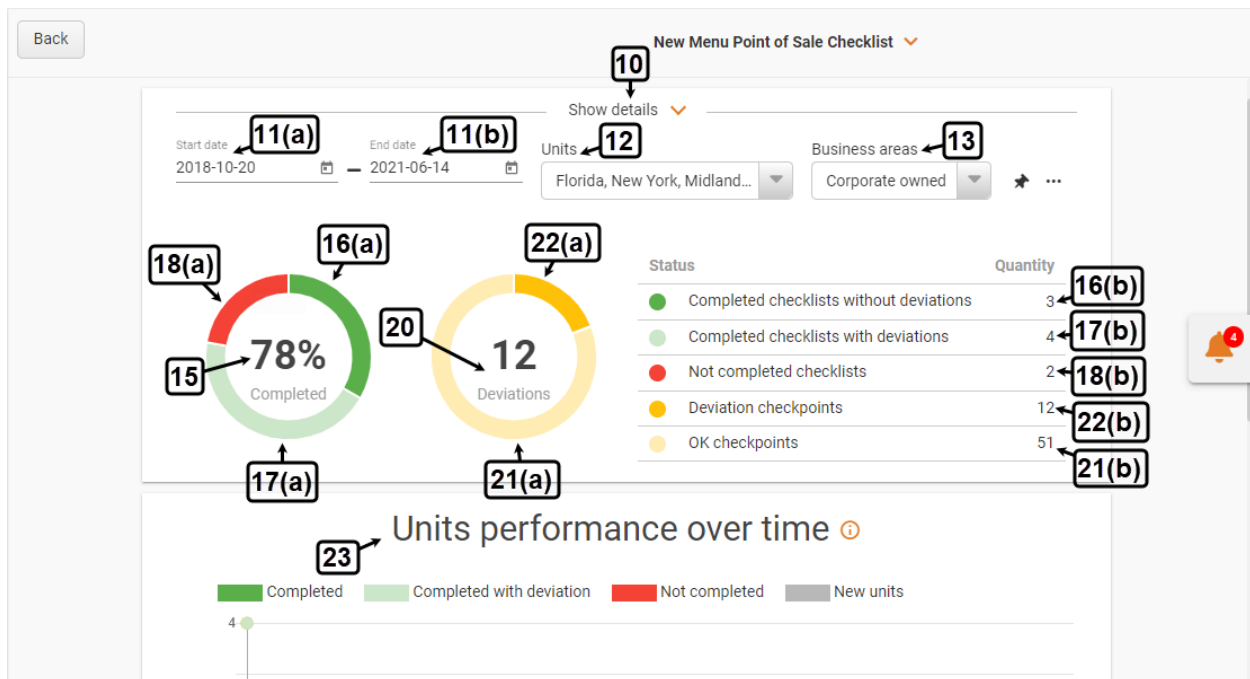
10. You can review brief information about the selected checklist by clicking the show details button at the top of the **Checklist report** page.
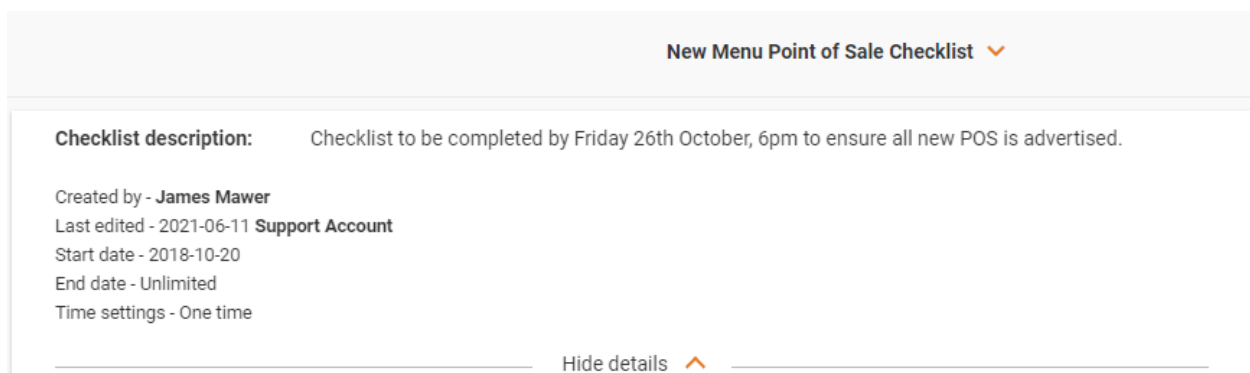
11. By default, the system will show you the statistics from the **start date** of the selected checklist to the current date or the date when it was last active.

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However, you can change this period by selecting an appropriate date in the **Start date** and **End date** fields.

12. By default, the system will show you the statistics of all the selected units.

However, you can filter the results for specific units by selecting them from the **Units** menu.

13. By default, the system will show you the statistics of units in all the business areas.

However, you can filter the results for specific business areas by selecting them from the **Business areas** menu.

The system will show you a brief statistical summary of responses of selected units to the selected checklists in the form of two pie charts.

14. The **Completion** pie chart shows the proportional response of the selected users in the selected units to the selected checklist in the specified period.

15. The **central part** of the completion pie chart shows the percentage of the selected units that have completed the selected checklists with or without deviations in the specified period.
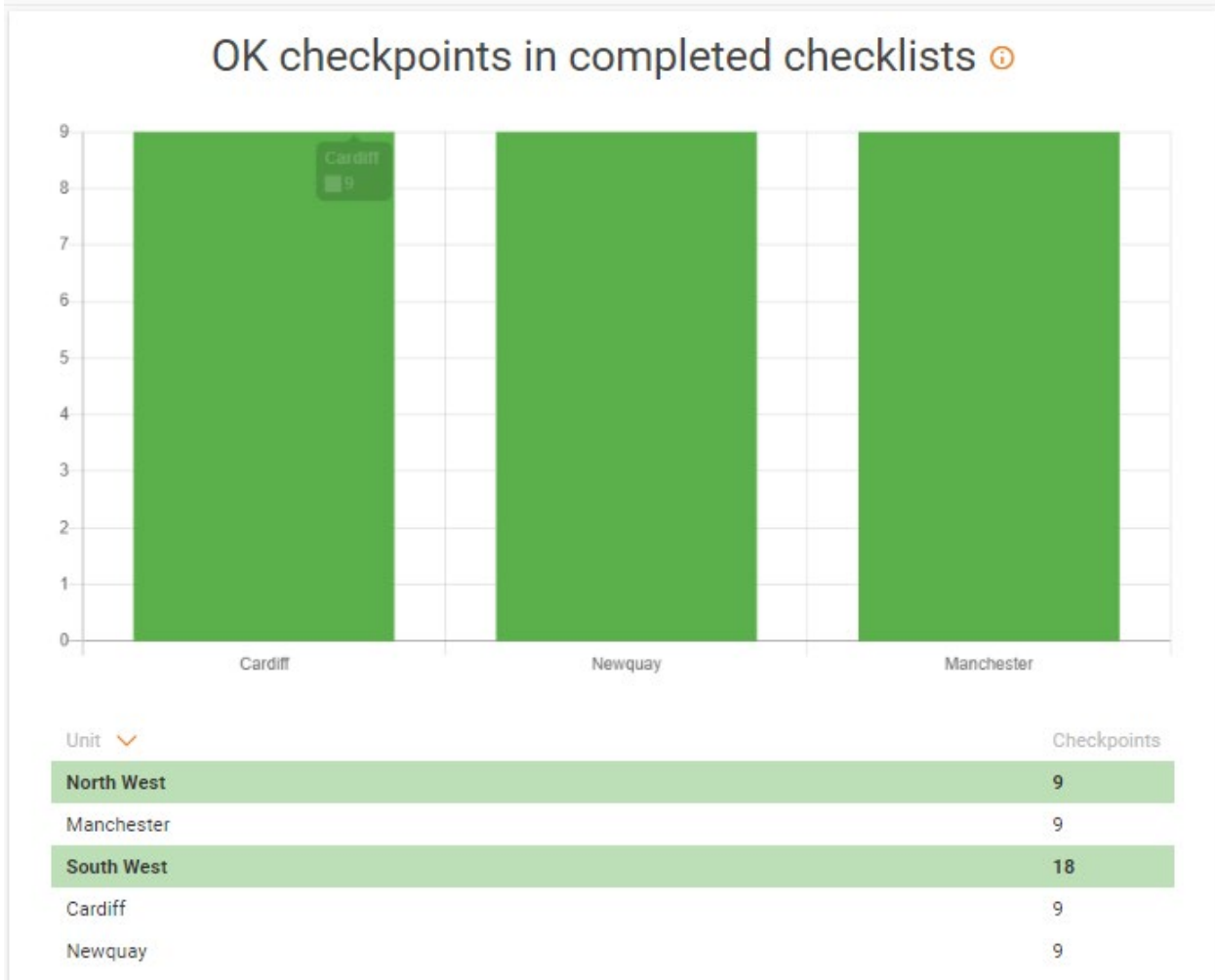
16. The **Dark Green** ( ) part of the completion pie chart constitutes the proportion of the selected units that have completed the selected checklist without any deviation in the specified period. In other words, these units have completed all the tasks in the checklist and marked all the checkpoints as **ok**.

16(a). You can view the percentage of units that have completed the selected checklist with no deviations by hovering your mouse anywhere over the **Dark Green** ( ) part of the completion pie chart.

16(b). You can view the total number of units that have completed the selected checklist with no deviations next to the **Completed checklists without deviations** heading in the explanatory table on the right side of the two pie charts.

16(c). You can view the details of these units as well by clicking anywhere on the **Dark Green** ( ) part of the completion pie chart or the **Completed checklists without deviations** heading in the explanatory table.

You will be redirected to the **OK checkpoints in completed checklists** histogram that shows the total number of checkpoints with the **OK** status in all the units that have completed the selected checklist in the specified period.

OK checkpoints in completed checklists ⓘ

Unit ⌄	Checkpoints
North West	**9**
Manchester	9
South West	**18**
Cardiff	9
Newquay	9

17. The **Light Green** (   ) part of the pie chart constitutes the proportion of the selected units that have completed the selected checklist with deviations in the specified period. In other words, these units have not completed all the tasks in the checklist and marked one or more checkpoints as **not ok**.

17(a). You can view the percentage of units that have completed the selected checklist with deviations by hovering your mouse anywhere over the **Light Green** (   ) part of the pie chart.
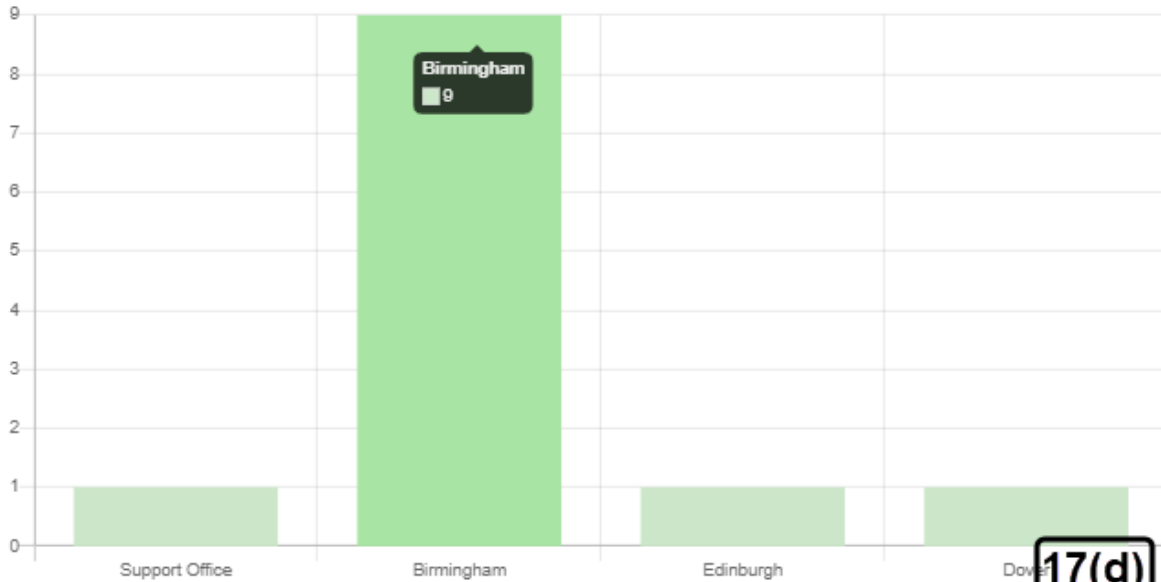
17(b). You can view the total number of units that have completed the selected checklist with deviations next to the **Completed checklists with deviations** heading in the explanatory table on the right side of the two pie charts.

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17(c). Likewise, you can view the details of these units as well by clicking anywhere on the **Light Green** (   ) part of the completion pie chart or the **Completed checklists with deviations** heading in the explanatory table.

You will be redirected to the **Deviations in completed checklists** histogram that shows number of deviations in each unit that have completed the selected checklist in the specified period.

17(d). Under the **Periods** heading in the table shown below the **Deviations in completed checklists** histogram, you can also view how many times a specific checkpoint was marked as "not ok" by a specific unit.

New Menu Point of Sale Checklist ∨

Deviations in completed checklists ⓘ

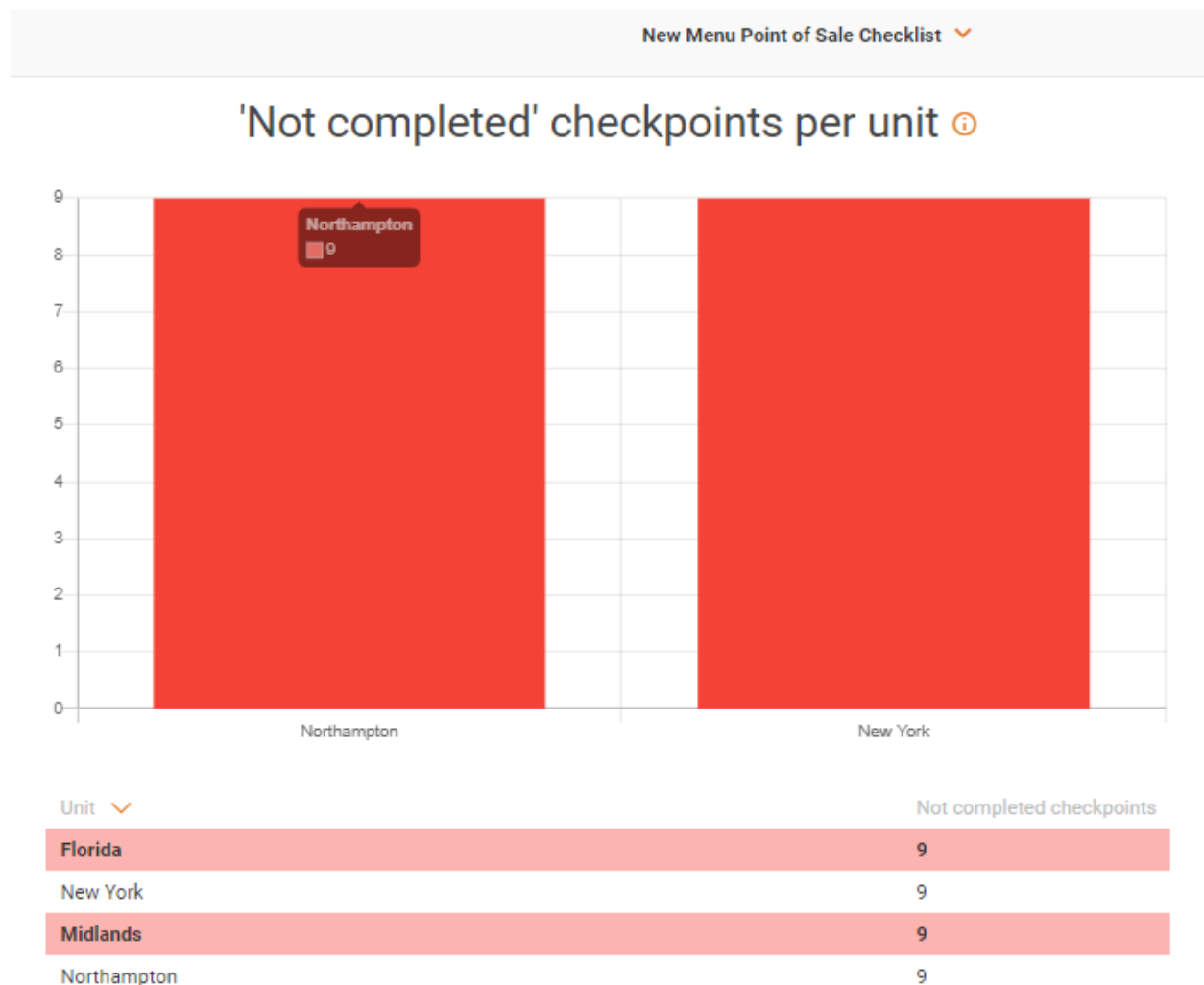| Unit ∨	Deviations	Checkpoints	Periods ⓘ
Midlands	10		
Support Office	1		1
Birmingham	9		1
			1
			1
			1
			1
			1
			1
			1
			1
			1
			1
North East	1		
Edinburgh	1		1
South East	1		
Dover	1		1

18. The **Red** (⬛) part of the pie chart constitutes the proportion of the selected units that have not completed the selected checklist yet.

Stick to your concept

18(a). You can view the percentage of units that have not completed the selected checklist in the specified period by hovering your mouse anywhere over the **Red** ( ) part of the pie chart.

18(b). You can view the total number of units that have not completed the selected checklist yet next to the **Not Completed checklists** heading in the explanatory table on the right side of the two pie charts.

18(c). You can view the details of these units as well by clicking anywhere on the **Red** ( ) part of the completion pie chart or the **Not Completed checklists** heading in the explanatory table.

You will be redirected to the **"Not completed" checkpoints per unit** histogram that shows the total number of checkpoints in all the units that have not completed the selected checklist in the specified period.

New Menu Point of Sale Checklist ∨

'Not completed' checkpoints per unit ⓘ

Unit ∨	Not completed checkpoints
Florida	9
New York	9
Midlands	9
Northampton	9

19. The **Deviations** pie chart shows the proportion of the "ok" and "not ok" checkpoints in all the checklists that are either completed or not completed by the selected units in the specified period.

20. The **central part** of the deviations pie chart shows the total number of deviations in all the checklists that are either completed or not completed by the selected units in the specified period.

21. The **Yellow(**) part of the deviations pie chart constitutes the proportion of the "ok" checkpoints in all the checklists that are either completed or not completed by the selected units in the specified period.
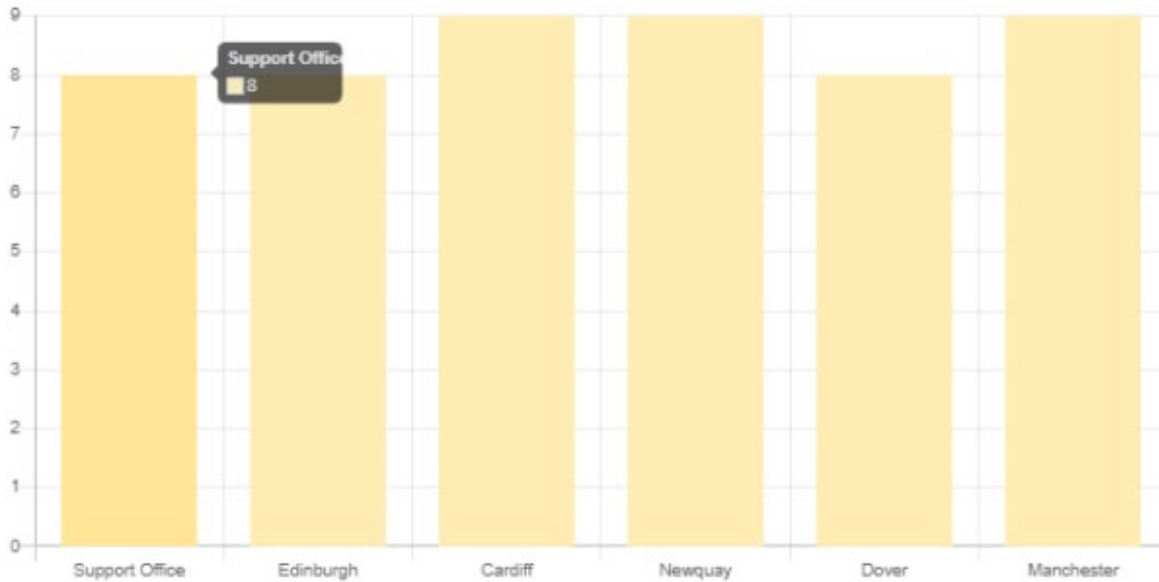
21(a). You can view the percentage of the "ok" checkpoints in all the checklists that are either completed or not completed by the selected units by hovering your mouse anywhere over the **Yellow(**) part of the deviations pie chart.

21(b). You can view the total number of the "ok" checkpoints in all the checklists that are either completed or not completed next to the **OK checkpoints** heading in the explanatory table on the right side of the two pie charts.

21(c). You can view the total number of these checkpoints by clicking anywhere on the **Yellow(**) part of the deviations pie chart the **OK checkpoints** heading in the explanatory table.

You will be redirected to the **OK checkpoints** histogram that shows the total number of checkpoints with the **OK** status in every unit that has completed at least one checkpoint of the selected checklist in the specified period.

New Menu Point of Sale Checklist ∨

OK checkpoints ⓘ

Unit ∨	OK checkpoints
Midlands	8
Support Office	8
North East	8
Edinburgh	8
North West	9
Manchester	9
South East	8
Dover	8

22. The **Amber** (▨) part of the deviations pie chart constitutes the proportion of the deviation checkpoints in all the checklists that are either completed or not completed by the selected units in the specified period.

22(a). You can view the percentage of the deviation checkpoints in all the checklists that are either completed or not completed by the selected units by hovering your mouse anywhere over the **Amber** (▨) part of the deviations pie chart.
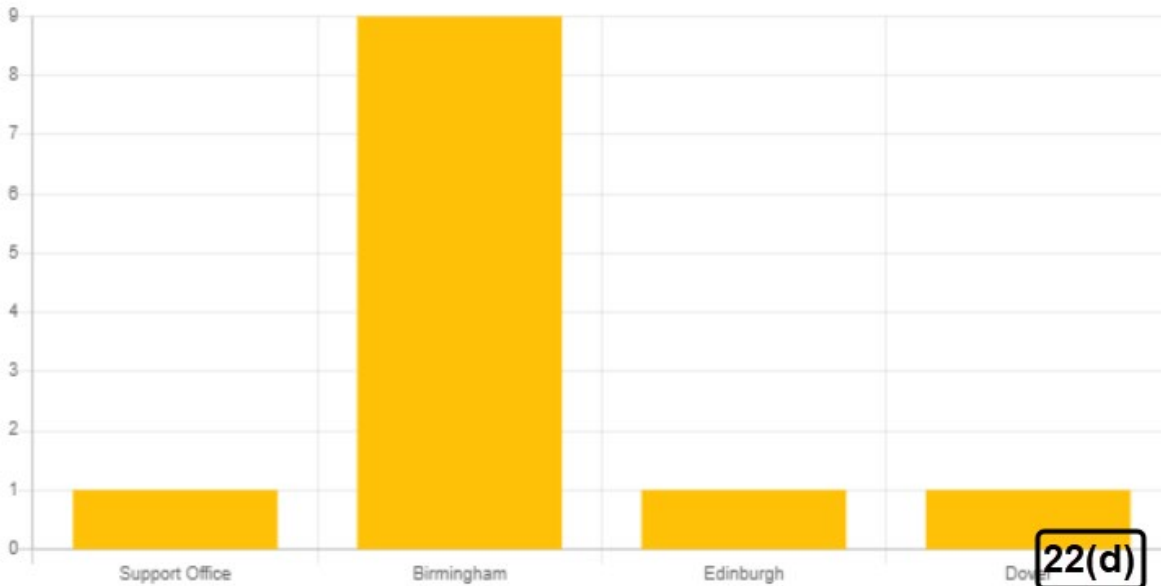
22(b). You can view the total number of the deviation checkpoints in all the checklists that are either completed or not completed next to the **Deviation checkpoints** heading in the explanatory table on the right side of the two pie charts.

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22(c). You can view the total number of these checkpoints by clicking anywhere on the **Amber** (

) part of the deviations pie chart or the **Deviation checkpoints** heading in the explanatory table.

You will be redirected to the **Deviations per unit** histogram that shows the total number of deviations in each unit that has marked at least one checkpoint of the selected checklist as "not ok" in the specified period.

17(d). Under the **Periods** heading in the table shown below the **Deviations per unit** histogram, you can also view how many times a specific checkpoint was marked as "not ok" by a specific unit.

Deviations per unit ⓘ

Unit ⌄	Deviations	Checkpoints	Periods ⓘ
Midlands	10		
Support Office	1	1	
Birmingham	9	1	
		1	
		1	
		1	
		1	
		1	
		1	
		1	
		1	
		1	
North East	1		
Edinburgh	1	1	
South East	1		
Dover	1	1	

23. You can view the overall performance of the selected units in the specified period in the **Units performance over time** graph.

The dots in the graph show how many units had a certain status (OK, deviation, etc.) over time in the specified period. I could not save the graphic you shared with me in our last meeting. Please share it again to be included here.