

### Chainformation Admin User Guide (Checklists 2.0 Module)

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Welcome to the **Chainformation** user guide. In this version of Checklists 2.0 manual, we will learn how to create new checklists and schedules in the module.

With this Checklists 2.0 module, the checklist/tasklist (what to do) is separated from Schedule (when, who and where). Now, you can connect one checklist with multiple schedules, which is valuable if you have locations with different opening hours as an example. These schedules could be recurring, one-time and on-demand. You can also create Brand Audit Checklists and audit schedules in a separate module. See the user guide for **Audit checklists** 

Checklist and Audit schedules have their own sharing selection and time settings which are independent of each other. This allows you to run the same checklist or audit with different time schedules for different units, areas, business areas and/or roles. It will allow you to exactly tailor access to local conditions.

**Note:** For now, this document only has user guides on how to create a new checklist 2.0, schedule it for different units and complete a scheduled checklist for your current unit. Later, we are also going to include instructions on checklist 2.0 templates, Reports dashboard, etc. in this manual.

Here is a list of features of the **Checklists 2.0** module that we will discuss in this manual.

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### Create a New Checklist 2.0

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

**Note:** You must have **Administrate** right on at least local level of Checklists 2.0 module to create a new checklist. <u>See the user guide for **Roles administration**</u>

1. Click the **Checklists 2.0** button in the left-side menu to open the Checklists 2.0 tab.

**Note:** You cannot create or edit **Checklists 2.0** on the **Chainformation** mobile app due to screen space restrictions. 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 scheduled checklist in the mobile app.

Q Search						Support Account Birmingham	•	0
Home	Checklists 2.0 Temp	olates Manage schedules	Reports				[2 <del>] '</del>	+
🗋 Pages 🛛 🚥 🜒						Search		Q
Files								
Forms	Shared with me	↓† Name	Checkpoints status	$\downarrow\uparrow$ Schedule name	$\downarrow\uparrow$ Start date & time	↓3 End date & time	$\downarrow\uparrow$ Last edited	
Tasks	Current checklis	Fire safety rounds	0/5	Fire safety schedule	On-demand	Closes 2 hours after start	2024-06-25 Anders Hall	
Form	Non current che	Daily opening routines	0/6	Morning schedule (Europe)	2024-11-30, 08:00 (UTC +0)	2024-11-30, 08:59 (UTC +0)	2024-06-07 Anders Hall	1
	On-demand che	Daily opening routines	0/6	Morning schedule (USA)	2024-11-30, 09:00 (UTC +0)	2024-11-30, 10:59 (UTC +0)	2024-06-07 Anders Hall	1
Cur organisation	Expired checklis	Daily gym opening	0/11	Daily morning routine Gym	2024-11-30, 08:00 (UTC +0)	2024-11-30, 19:59 (UTC +0)	2024-10-17 Anders Hall	1
🌼 System setup		Weekly routines for local man	0/8	Weekly schedule for local ma	2024-12-02, 09:00 (UTC +0)	2024-12-03, 12:59 (UTC +0)	2024-06-07 Anders Hall	<b>*</b>
Checklists 2.0								
Audit checklists								
Send SMS								
Collapse menu								

2. Click the (+) icon in the top-right corner of the **Checklists 2.0** page to create a new checklist.

This will open **Create new checklist** pop-up.

	Create new checklist
Na <b>nd</b> e safety n	Create manually Selecting this option allows you to manually create a new checklist from scratch, tailoring it to your specific needs and requirements.
y openin	Create using templates Selecting this option allows you to speed up checklist creation by duplicating and customizing existing templates to suit your current needs, saving time and ensuring consistency.
	Checklist name
$a) \rightarrow$	Daily compliance routine
	а патте тог уош спескизк.
b) →	Description
	A brief description of the checklist (optional).
	جا ا

#### 3. You can choose to **create a new checklist using a template**. <u>See the user guide for **Checklists**</u> <u>**2.0 templates**</u>

When you choose a template to create a checklist, this template name, checkpoints, compliance settings are copied to the new checklist and you can save this checklist after selecting appropriate sharing settings for it. You can customize checklist data duplicated from template according to your requirements before saving this checklist.

4. You can choose "**Create manually**" option in the **Create new checklist** pop-up to create a new checklist from scratch.

4(a). Enter a **Checklist name**. This should be explanatory, short and concise.

4(b). Enter a brief presentation (If needed) of the new checklist in the **Description** field.

5. After you have chosen a checklist template or entered its name, description manually, click **DONE** button on the Create **new checklist** pop-up to go to the New **checklist** page.

< New checklist			
Translation Swedish English German	Checklist name Daily compliance routine A name for your checklist.  Description A brief description of the checklist (optional).  Checkpoints Manage checkpoints, sections, conditions and actions. This checklist has 0 checkpoints	,	<ul> <li>Checklist 2.0: Once a checklist is created, it can be shared with the relevant areas or units responsible for scheduling it. A checklist can have multiple schedules, however a schedule can only belong to one checklist.</li> <li>Checklist schedule: After a checklist is shared, it can be set to run at specific times, intervals, and during creatian operational periods. Schedules assign the checklist to the appropriate units and roles responsible for completing it.</li> </ul>
6	Compliance threshold Set a compliance threshold This checklist has no compliance threshold	,	Create Checklist 2.0 - Create the checklist by incorporating relevant checkpoints.     Share Checklist 2.0 - Share it to areas and units who will manage its scheduling.     Create Checklist schedule - Set the time, intervals and operational period of the schedule.
	Sharing settings Share the checklist for scheduling and editing in selected areas or with individual units. Currently shared with 0 areas and 0 units	1	4. Share Checklist schedule - Assign to the units and roles that will complete the checklist.           Save
15	QR-codes List of QR-codes for export QR codes disabled.	,	

6. Click on **Compliance threshold** card on **Create new checklist** page to set a compliance threshold for this checklist (if required).

	Compliance threshold
	Ensure compliance and determine if checklist scoring meets your set threshold.
പ	
ŏ  -	Set a compliance threshold
_	100%
	Non- compliance action
	If compliance falls outside of the approved limit set action Add action
	14 •
	CANCEL

7. When you **Enable compliance threshold** for a checklist, this feature calculates an overall compliance threshold level based on checkpoints scores.

By default, the compliance threshold of a checklist is set to 100% after you enable it. <u>https://chainformation.com/userguides</u>



8. You can select another value from the "Set a compliance threshold" dropdown.

For example, setting the compliance threshold at 90% means that a score of 90% or higher is considered compliant. <u>Refer to items 26-27 in this user guide to learn how to set **checkpoints** <u>scoring</u></u>

You can add action to alert selected colleagues when checkpoints score on this checklist falls below the established threshold in an iteration.

9. Click on **Add action** button to open **Send notification** editor.

10. On Send notification editor, choose roles and users who should get this notification.

10(a). When you choose "**Staff from selected roles on the local unit**" e.g. local manager to receive this notification, all users who have access to this role from their profile will receive a notification every time this checklist is flagged non-compliant in an iteration.

10(b). You can choose "**Staff from selected roles and units**" e.g. global sales manager from company head office to receive non-compliance notification from this checklist.

10(c). You can also choose "**Selected staff members**" to receive non-compliance notification from this checklist.

O Swe Compliance threshold	
Send notification	
If compliance falls outside of the appr	oved limit, it will be sent to the selected recipients.
Staff from selected roles on the	e local unit
10(a) Staff from selected roles on the	local unit
10(b) Staff from selected roles and uni	its
Selected staff members	12(a)
Selected email addresses	
Selected phone numbers (SMS)	12(0)
	CANCEL OK
	Sharing settings
	Share the checklist for scheduling and editing in selected areas or with individual units.
	Currently shared with 0 areas and 0 units

11. By default, users get non-compliance notifications on browser and mobile app.

You can also choose to send this notification as email and SMS to selected colleagues on their primary email address and phone number (if available) under **Notification method** header. <u>https://chainformation.com/userguides</u>

Translatio	Description
O Swe	Send notification
Eng	If compliance falls outside of the approved limit, it will be sent to the selected recipients.
U den	Staff from selected roles and units
	Who is the recipient of this notification?
	Roles to notify*
	01 SuperAdmin 👻
	Staff with a matching role on any selected unit will be notified.
	- Select units*
	Support Office 👻
[11]	The notification will be sent to users with a matching role on any selected unit.
	Notification methods
	Notification in browser and mobile app SMS Email
	11(b) CANCEL OK

12. You can also choose to send this notification to **Selected email addresses** or **phone numbers (SMS) externally,** that are not even associated with any user in your organisation.

13. Once you have added all required details on the Send **notification** editor, click the OK button to save this automated non-compliance alert.

14. Now, click the DONE button on the Compliance **threshold** card to save compliance settings for this checklist and non-compliance (if any).

This will redirect you to the New **checklist** editor page.

By default, QR-codes are disabled for a checklist.

15. You can **Enable QR-codes** from the QR-codes **card** on the New **checklist** page to add mandatory QR-code conditions for checkpoints on this checklist. <u>Refer to item 30 in this user</u> guide to learn how to add **mandatory QR-code condition** for checkpoints

	Checl	kpoints		
	QR-codes	15		
	Enable QR-codes	0		
[16(b)]→	Export list		-	
	Price marking	Show code + 16(a)	)]	
	Windows and display	Hide code		
				ŕ
	7 B			
			CANCEL	DONE



16. Once you have added at least one checkpoint on this checklist, you can **view** and **Export list** of all checkpoints on this card. <u>Refer to items 19-48 on this user guide to learn how to **add new checkpoints** in a checklist</u>

17. Click on **DONE** button on **QR-codes** card after enabling QR-codes for this checklist to save this setting.

18. Click on **Checkpoints** card on **New checklist** page to manage checkpoints, sections, conditions and actions for the new checklist.

19. On **Checkpoints** page, click **Add checkpoint** button to add a new checkpoint.

Translation	Checkpoints	Checkpoints summary	
Swedish		0 Checkpoints	Add
English	Add checkpoint	1 Section	Add
German			
		Save	

This will open **New checkpoint** pop-up.

Translation	New checkpoint
Swedish	You can change this later.
20(a)	Charlesian
	Checkpoint name
German	Cooler temperature
	A name that summarizes this checkpoint.
20(b)	- Description
Ĺ	Attach photo of latest reading
	Action proto or latest reading
	A more detailed description of the checkpoint.
	20(C)
	<u> </u>
	CANCEL DONE

20. On New checkpoint pop-up, enter a checkpoint name, description (if needed) and click **DONE** button to go to **Edit checkpoint** page.



< Edit checkpoint	28	
Translation Swedish English German 22, 24, 25,	General       Conditions       Actions         Checkpoint name       Cooler temperature         A name that summarizes this checkpoint.       Attach photo of latest reading         A track photo of latest reading       Attach photo of latest reading         A more detailed description of the checkpoint.       23         Answer options       Status         Answer options       Measurement         Choose measurement unit       Maswer must be a numeric value         Choose measurement unit       Value ranges         Any value*       Mas* =       1s*         Any value*       Mas* =       1s*         Any value*       Number*       1s*         Categer than or equal to       42.8       "F	Statua Recommended for most checkpoints, where the reporter have to confirm if a checkpoint is 0K or Not OK based on a given description. Mexammended for checkpoints when the reporter need to register a numeric value of some sort, where different values are considered OK or Not OK. All undefined numbers are considered Not OK.
	Add range	
26- 27	Scoring Please select an appropriate category for this checkpoint and assign the corresponding score. Select checkpoint category* Major checkpoint 10 pts	

21. Select **Answer options** for the new checkpoint on **General** tab of **Edit checkpoint** page.

22. If you select "Status" answer option, users will answer this checkpoint as OK or Not OK.

23. If you select "**Measurement**" answer option, users will answer this checkpoint by entering a numeric value in a defined unit.

24. If you have selected the measurement answer option, select "**Measurement unit**" in which users will answer this checkpoint. This is only a label with no actual functionality.

25. Select "**Value ranges**" that should be considered OK or Not OK. You can choose value ranges as follows:

25(a). Any value between selected minimum and maximum numbers is OK or Not OK e.g. cooler temperature between 35.5°F and 42.7°F is OK.

25(b). Any value greater than or equal to a selected number is OK or Not OK e.g. cooler temperature greater than or equal  $42.8^{\circ}$ F is Not OK.

25(c). Any value less than or equal to a selected number is OK or Not OK e.g. cooler temperature less than or equal to  $35.4^{\circ}$ F is Not OK.



**Remember,** all undefined numbers that don't fall under any of listed value ranges are considered Not OK. So, you should add at least one OK range for a measurement checkpoint.

26. Enable **Scoring** feature if this checkpoint answer should be considered when calculating compliance score of this checklist (if applicable).

**Remember, Scoring** feature for a checkpoint will be available only if **Compliance threshold** is enabled for this checklist. <u>Refer to items 6-8 in this user guide to learn how to **enable** <u>compliance threshold</u> for a checklist</u>

27. After enabling checkpoint **Scoring**, select an appropriate compliance category and corresponding score for this checkpoint.

28. Now, go to **Conditions** tab to add mandatory comment, attachment or QR code conditions for the new checkpoint.

< Edit checkpoint	31 <b>7</b>		
Translation Swedish	General Conditions Actions		Mandatory comments, attachments or QR codes Use answering conditions to require a comment attachment or QR code from staff
German	QR-code  Always	· ·	members before they can complete the checkpoint.
	Mandatory* When*	- Î	Save
	Always 29(a) 29(b) Reported value is <b>o</b> K		48
	29(c)		

29(a). You can add "attachment/comment is always mandatory" condition.

29(b). You can add "attachment/comment is mandatory when answer is OK" condition.

29(c). You can add "attachment/comment is mandatory when answer is Not OK" condition.

30. You can add **mandatory QR-code** condition for a checkpoint that means users can answer it only after scanning QR-code of this specific checkpoint.

**Remember**, you can add mandatory QR-code condition for a checkpoint only if QR-codes are enabled for this checklist. QR-codes of all checkpoints in a checklist are found in QR-codes card on checklist editor page. <u>Refer to item 15 in this user guide to learn how to **enable QR-codes** for <u>a checklist</u></u>

31. Now, go to Actions tab to add automated actions for this checkpoint.



< Edit checkpoint Translation Swedish English German	General Conditions Actions 32 Add action Automated task 33 Sond patification 41	Automated actions Actions added here will run once the defined trigger action-trigger occurs. You add multiple actions with different or similar triggers.
	48→	Save

32. Click on **Add action** button on **Actions** tab to add an automatic action.

33. Click on **Automated task** button from **Add action dropdown** to create an automated task action.

This will open Automated task editor pop up.

Ŀ	Automated task
ï.	Describe the task to be assigned. Details about the reporter, unit, affected checklist and checkpoint will automatically be added to the task description. Comments and attachments from the reporter will also be added.
6	Answer is Not OK
	When should this task automatically be created?
L.	Task You've been assigned this task because:
չ	Staff name in Unit name reported the checkpoint "checkpoint" in "checklist" as "value".
Ь	Comments
6	Check cooler function
$\mathbf{b}$	Check why cooler temperature is not maintained at recommended level
	Describe the task
Ь	Assign task to*
	Staff from selected roles on the local unit
	Who is this task for?
	Roles to assign*
	Staff with a matching role on the local unit will be assigned the task.
	<u>¥</u>
	CANCEL

34. Choose when this task should be created for selected colleagues.

34(a). If you choose "**Answer is Not OK**" option, a task will be created for selected colleagues everytime a deviation occurs on this checkpoint i.e. it's answered Not OK in a checklist iteration.

34(b). If you choose "**Answer is OK**" option, a task will be created for selected colleagues everytime this checkpoint is answered OK in a checklist iteration.

34(c). If you choose "**Checkpoint is answered**" option, a task will be created for selected colleagues everytime this checkpoint is answered either OK or Not OK in a checklist iteration.

34(d). If you choose "**Checkpoint is skipped**" option, a task will be created for selected colleagues everytime this checkpoint is not answered in a checklist iteration.

35. Name of user who answered this checkpoint, their unit name, affected checklist, checkpoint, comment and attachments (if any) will automatically be added to the task description.

36. Write a Task name for this automated action.

37. You can further describe what needs to be done in **Task description**.

38. Choose roles and users who should be assigned this task.

38(a). When you choose "**Staff from selected roles on the local unit**" e.g. local manager as task assignee, all users who have access to this role from their profile will be assigned this task everytime checkpoint action defined in item 21 is reported from their current unit.

38(b). You can choose "**Staff from selected roles and units**" as task assignee e.g. global sales manager from company head office.

38(c). You can also choose "Selected staff members" as task assignee.

39. Once you have added all required details on **Automated task editor**, click **OK** button to save this checkpoint action.

40. Click on **Add action** button on **Actions** tab to add another automatic action.

41. Click on **Send notification** button to create an automated notification action.

This will open **Send notification editor** pop up.

42. Choose when this notification should be sent to selected colleagues.

42(a). If you choose "**Answer is Not OK**" option, a notification will be sent to selected colleagues everytime a deviation occurs on this checkpoint i.e. it's answered Not OK in a checklist iteration.

42(b). If you choose "**Answer is OK**" option, a notification will be sent to selected colleagues everytime this checkpoint is answered OK in a checklist iteration.

42(c). If you choose "**Checkpoint is answered**" option, a notification will be sent to selected colleagues everytime this checkpoint is answered either OK or Not OK in a checklist iteration.



42(d). If you choose "**Checkpoint is skipped**" option, a notification will be sent to selected colleagues everytime this checkpoint is not answered in a checklist iteration.

Translatic			
O Swe	Send notification		
42	The outcome of this checkpoint will be sent to the selected recipients.		
	Answer is Not OK		•
43	When should this notification be sent?		
	Staff from colorated raises on the local unit		_
			•
	Who is the recipient of this notification?		
	Roles to notify*		
	US Site Manager / Franchisee		•
	Staff with a matching role on the local unit will be notified.		
	Notification methods		
	✓ Notification in browser and mobile app		45
			V
		CANCEL	ок

43. Choose roles and users who should get this notification.

43(a). When you choose "**Staff from selected roles on the local unit**" e.g. local manager to receive this notification, all users who have access to this role from their profile will receive a notification everytime checkpoint action defined in item 30 is reported from their current unit.

43(b). You can choose "**Staff from selected roles and units**" e.g. global sales manager from company head office to receive this notification.

43(c). You can also choose "Selected staff members" to receive this notification.

44. By default, users get checkpoint update notifications on browser and mobile app.

You can also choose to send this notification as email and SMS to selected colleagues on their primary email address and phone number (if available).

45. You can also choose to send this notification to **Selected email addresses** or **phone numbers (SMS)** that are not even associated with any user in your organisation.

46. Once you have added all required details on **Send notification editor**, click **OK** button to save this checkpoint action.

47. You can add more automated tasks following items 32-39 and notifications following items 40-46 from this user guide.



48. Now, review all information you have added on **General**, **Conditions** and **Actions** tabs of **Edit checkpoint** page and click **Save** button to save this checkpoint and its settings.

This will redirect you to **Checkpoints** page of **New checklist** editor where you can add more checkpoints in this checklist by following items 19-48 from this user guide.

anslation		Checkpoints					1	Checkpoin	ts summary	
Swedish		Cooler temperature		<u> </u>	1	<b>m</b> <	49	4 Checkpo	ints	Add
English				-	2	-	Ē	2 Sections		Add 🗲
German	50	(Copy) Cooler temperature		<u>4</u>	(III)	٥	Ψ.			
	00		Add checkpoint						Save	
		II Entrança						-54	1	
	56 7							ت	57	
		Checkout machine		0	(A)	٥	Ξ.	_	—	
		Service time at checkout		<b>ATA</b>	<i>iî</i>	r <b>i</b> lli		53		

49. You can also create copies of added checkpoints by clicking **Copy checkpoint** button next to its name.

50. This will create a new checkpoint with exactly the same settings as in the original checkpoint that you can edit as required.

By default, all checkpoints in a checklist are added in one section.

51. You can add more sections in a checklist by clicking **Add** button next to **Sections** label in **Checkpoints summary** card on **Checkpoints** page.

52. This will open **Add section** pop up where you can add a new checkpoints section after adding its name.

	Add section		
52(a)	You can change this later. Section name* Exterior		<b>52(b)</b>
	What should we call this section?		Ţ
		CANCEL	DONE

53. You can edit a section name or delete this section by clicking Edit ( ) icon next to its name.

Remember, when you delete a section, all checkpoints in this section are also deleted.



54. You can delete an individual checkpoint by clicking **Bin** icon next to its name.

55. You can move checkpoints up and down in a section or move them to another section using drag and drop feature.

56. You can also move checkpoints sections up and down using drag and drop feature.

57. Once you have added all checkpoints and sections, click **Save** button on **Checkpoints** page to save these checkpoints and sections.

This will redirect you to **New checklist** editor page.

< New checklist			
Translation Swedish English German	Checklist name Daily compliance routine Aname for your checklist. Description A brief description of the checklist (optionar).		Understanding Checklist 2.0 and its schedules  • Checklist 2.0: Once a checklist is reated, it can be shared with the relevant areas or units responsible for scheduling it. A checklist can have multiple schedules, however a schedule can only belong to one checklist. • Checklist schedule: After a checklist is scherd it can be shared or un at
	Checkpoints Manage checkpoints, sections, conditions and actions. This checklist has 4 checkpoints	>	a parette, it can be set to full at specific times, intervals, and during certain operational periods. Schedules assign the checklist to the appropriate units and roles responsible for completing it. <ol> <li>Create Checklist 2.0 - Create the checklist by incorporating relevant</li> </ol>
	Compliance threshold Set a compliance threshold The compliance threshold for this checklist is set at 90%.	1	checkpoints. 2. Share Checklist 2.0 - Share it to areas and units who will manage its scheduling. 3. Create Checklist schedule - Set the time, intervals and operational period of the schedule.
58-	Sharing settings     Share the checklist for scheduling and editing in selected areas or with individual     units.     Currently shared with 0 areas and 0 units	,	<ol> <li>Share Checklist schedule - Assign to the units and roles that will complete the checklist.</li> </ol>
	QR-codes List of QR-codes for export Currently 4 QR-codes available.	,	<b>↑</b> 63

58. Click on **Sharing settings** card to set sharing preferences for this checklist.

59. By default, a checklist is set to "Share" status.

60. You can also set its status to "Not shared".

**Remember**, when a checklist is set to **Not shared** status, it's not available for scheduling to any user except checklist creator.



Sharing settings			
Not shared  Share	61(2)		
Business areas		Areas	
Corporate owned	ŧ	UK	
Franchised		Finland	
Mobile Units	••••••	USA	
□ NW		Sweden	
Add unit	5 5		
Support Office			6 Remove u
Birmingham		C	Add u
	areas and u units	_	

61. If you choose to keep "Share" status for this checklist, select areas/units and business areas to which you want to share it.

Once you save this checklist, it will be available for scheduling to users with appropriate rights from selected areas and units. <u>See the user guide for **Create a checklist schedule**</u>

62. Click on **DONE** button on **Sharing settings** card to save sharing preferences for this checklist.

This will redirect you to **New checklist** page.

63. Review all checkpoints, settings for this checklist and click **Save** button on **New checklist** page to save it.

**Remember**, a new checklist is not available for completion until it's connected with at least one schedule.

Now, we will learn how to create a new checklist schedule, share it to different units and roles for completion.

#### **Create a Checklist Schedule**

1. Follow the navigation steps demonstrated in the previous section to access **Checklists 2.0** module and go to **Manage schedules** tab on this module to schedule a checklist.

					Support Accoun Birmingham	t+	8
Checklists 2.0 Ten	mplates Manage schedules	Reports				2(a)	→ +
	<b>1</b>				Search		Q
Shared with me	↓↑ Schedule name	↓↑ Checklists	Schedule type	$\downarrow\uparrow$ Operational from	↓} Operational until	$\downarrow\uparrow$ Last edited	
Created by me	Not scheduled yet	Daily compliance routine	2(b)				
Recurring sched	Fire safety schedule	Fire safety rounds	On-demand	On-demand	Closes 2 hours after start	2024-06-22 Anders Hall	1
On-demand sch	Daily morning routine Gym	Daily gym opening	Recurring schedule	2024-12-08, 08:00 (UTC +0)	2024-12-08, 19:59 (UTC +0)	2024-10-17 Anders Hall	1
	Morning schedule (Europe)	Daily opening routines	Recurring schedule	2024-12-09, 08:00 (UTC +0)	2024-12-09, 11:59 (UTC +0)	2024-06-07 Anders Hall	1

**Note:** You must have **Share** right on at least local level of Checklists 2.0 module to create a new checklist schedule. <u>See the user guide for **Roles administration**</u>

You cannot create or edit **Checklist schedules** on the **Chainformation** mobile app. Therefore, you must log in to the **Chainformation** website platform to create a new checklist schedule or edit a saved schedule. However, all users can easily access, use and complete a scheduled checklist in the mobile app.

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

This will open **New checklist schedule** pop-up.

2(b). If a checklist is not connected with any schedule yet, you can click on this checklist row from **Shared with me** filter on **Manage schedules** tab to access **New checklist schedule** pop-up for this checklist.

2(c). If a checklist is not connected with any schedule yet, you can also access **New checklist schedule** pop-up for this checklist by clicking **Schedule checklist 2.0** option on **Checklists 2.0** table.

3. On **New checklist schedule** pop-up, enter a **Checklist schedule name**. This should be explanatory, short and concise.

4. By default, new schedule has **Recurring** type.

5. You can change this to **One-time** or **On demand** schedule type.



	Daily compliance schedule	
W	sex should we call this schedule? You can charge this later.	
Scl You	xedule type J can change this later.	
	Recurring schedule     Recommended for checklists that occur regularly.	
a)	One time schedule Recommended for checklists that just need to be completed once.	
b)	On demand schedule Recommended for checklists that only have to be completed under certain circumstances.	٦

6. After you have entered a schedule name and chosen its type, click **DONE** button on **New checklist schedule** pop-up to go to **Edit schedule** page.

nslation	Daily compliance schedule	Understanding Checklist 2.0 and its schedules
) Swedish	What should ve call this schedule? You can change this later.	relevant areas or units responsible for scheduling it. A checklist can have multiple schedules however
) English	Scheduled checklist	a schedule can only belong to one checklist.
) German	This checklist will run according to this schedule.	Checklist schedule: After a checklist is shared, it can be set to
-	Checklist* Daily compliance routine	<ul> <li>run at specific times, intervals, and during certain operational periods.</li> <li>Schedules assign the checkilst to the appropriate units and roles responsible for completing it.</li> </ul>
Li Li	Report setting  Allow other users to view the report for this schedule.	<ol> <li>Create Checklist 2.0 - Create the checklist by incorporating relevant checkpoints.</li> </ol>
	Operational period	<ol> <li>Share Checklist 2.0 - Share it to areas and units who will manage its scheduling.</li> </ol>
<b>[</b> 9/]	The schedule will be active and operational according to these settings.	<ol> <li>Create Checklist schedule - Set the time, intervals and operational period of the schedule.</li> </ol>
	Not operational     Ortinuously operational until stopped  9	4. Share Checklist schedule - Assign to the units and roles that will complete the checklist
9(a	a) -> Operational for a selected period	32
	Start date 2024-12-09	Save schedule

7. If you start creating a schedule by clicking a not scheduled checklist from Manage schedules tab (item 2b) or clicking Schedule checklist 2.0 option for it from Checklists 2.0 table (item 2c), this checklist is pre-selected in **Scheduled checklist** field.

7(a). You can select a different checklist to connect with this schedule from **Checklist** dropdown.

8. By default, all users with appropriate access level on Checklists 2.0 Reports module can view report for this schedule.

8(a). If you don't want other users to see report for this checklist schedule, you can deselect "Allow other users to view the report for this schedule" option in Report setting.



9. By default, a checklist schedule is "continuously operational until stopped" once you have saved this schedule.

9(a). You can set a checklist schedule to "**Operational for a selected period**". This means this schedule will be available for completion in iterations defined in its time settings from operational period start date to end date of this period. <u>Refer to items 11-23 in this user guide</u> to learn how to set time settings of a checklist schedule

9(b). You can set a checklist schedule to "**Not operational**" status from Operational period settings.

**Remember**, when a checklist schedule is set to **Not operational** status or has expired i.e. its operational period has ended, it's not available for completion unless its operational period settings are updated.



10. By default, a checklist schedule is set to recurring daily from 08:00 AM to 08:00 PM each day.

You can change time settings of this schedule on **Checklist time schedule** editor.

11. Click **Edit** (**^**) icon on Checklist time schedule card to access time settings editor pop-up.

_	
	Checklist time schedule
0	Schedule type
	Recurring schedule     Recommended for checklists that occur regularly.
	One time schedule     Recommended for checklists that just need to be completed once.
	On demand schedule     Recommended for checklists that only have to be completed under certain circumstances.
	Repetition
12(a)	Paily     Checklists opens and closes within the same day.
12(b)	Weeky     Checklists opens and closes within the same week.
12(c)	Monthly     For checklists that opens and closes within the same month.
12(d)	Yearly     For checklists that opens and closes within the same year.
	Checklist opening and closing times
	CANCEL DONE

12. If it's a recurring schedule, you can set it to repeat Daily, Weekly, Monthly or Yearly.

13. By default, a **daily recurring** schedule has Start time 08:00 AM and End time 08:00 PM each day.

13(a). You can change Start or End time of a completion period by clicking its value.

14(a). You can copy Start, End time of a completion period to next period of this schedule by clicking **Copy to next** button.

14(b). You can copy Start, End time of a completion period to all periods of this schedule by clicking **Copy to all** button.

15. You can add additional periods on the same day by clicking Add (+) button.

16. You can **disable** a completion period by clicking toggle button for this period.

**Remember,** when a checklist completion period is disabled, this checklist schedule is not available for completion in this specific period until this period is enabled again.

	Checklist time schedule	
	Friday J	
13		*
	01 05 <b>14(b)</b>	
	03 15 04 20 0 (c) (d) (e) 05 25	15→ +
	06 30	[16]→ ]
	0800 → 2000 ⊙ ) \$	+
	Remind time	
24	Provide a reminder for this checklist before closing time, based on the specified number of days and hours. The countdown begins upon starting the checklist.     Provide a reminder for this checklist before closing time, based on the specified number of days and hours. The countdown begins upon starting the checklist.	
		25 ✔
		CANCEL DONE

13(a). You can change Start or End time of a completion period by clicking its value.

14(a). You can copy Start, End time of a completion period to next period of this schedule by clicking **Copy to next** button.

14(b). You can copy Start, End time of a completion period to all periods of this schedule by clicking **Copy to all** button.

15. You can add additional periods on the same day by clicking Add (+) button.

16. You can **disable** a completion period by clicking toggle button for this period.

**Remember,** when a checklist completion period is disabled, this checklist schedule is not available for completion in this specific period until this period is enabled again.

17. When you set a schedule to **recurring weekly**, it has only one completion period by default that starts 08:00 AM, Monday and ends 08:00 PM, Sunday.

18. When you set a schedule to **recurring monthly**, its completion period starts 08:00 AM on first day each month and ends 08:00 PM on last day of this month.

19. When you set a schedule to **recurring yearly**, it has only one completion period by default that starts 08:00 AM, January 1 and ends 08:00 PM, December 31.

You can change time settings of weekly, monthly, yearly completion periods, add additional periods and disable a period by following navigation steps demonstrated in items 13-16.

20. When you set a schedule type to **One-time**, this checklist schedule can be completed only once for a unit.



21. You can set opening and closing times of a one-time checklist schedule by clicking **Open** and **Close** time fields respectively.

	Checklist time schedule								
0	Schedule type Recurring schedule Recommended for checklists that occur regularly.	DEC 2024	• M	т	w	т	F	< > s	
20-	One time schedule     Recommended for checklists that just need to be completed once.	DEC							
	On demand schedule Recommended for checklists that only have to be completed under	1	2	3	4	5	6	7	
	Checklist opening and closing times	15	16	17	18	12	20	21	
[21(a)]-	→ Open 2024.12.09, 08:00 ③	22	23	24	25	26	27	28	21(b) Close 2024.12.10, 20.00 ()
24	Remind time	29	30	31					
24)	Provide a reminder for this checklist before closing time, based on the Days before closing tin the Days before close time, based on th								ıt.
							[	~	25
									CANCEL DONE

22. When you set a schedule type to **On demand**, this checklist schedule has no pre-defined Start date and time. So, it never starts automatically for any unit. Instead, users who have access to complete this checklist schedule starts it manually on its completion page for their current unit when required.

< Fire safety rounds	:
Start the on-demand checklist.	Start
Checkpoints to keep a unit prepared for possible fire	Checkpoints status
Checkpoints	0%         © Completed         0           0%         Not completed         5
Does this unit have clear and accessible escape routes?	
	Save
Is firefighting equipment available on required places?	
O 0K O Not 0K	

By default, an on-demand schedule is set to close 8 hours after start in each completion period.

23. You can set End time of an on-demand completion period to a different value from **Close checklist** after field.

<ul> <li>Recurring schedule</li> </ul>		
Recommended for checklists that occur regularly.		
One time schedule     Recommended for checklasts that just need to be completed once.		
On demand schedule     Recommended for checklists that only have to be completed under certain circumstances.		
Checklist opening and closing times	23	
Open On-demiand	Close checklist after	8 Hours
		Years
		Months
		Weeks
Remind time		Dave
Remind time \$2 Provide a reminder for this checklist before closing time, based on the specified number of days and hours. The countdown begins upon starting the checklist.		Days
Remind time      Provide a reminder for this checklist before closing time, based on the specified number of days and hours. The countdown begins upon starting the checklist.     Noneta before closing		Hours

24. You can add a **Remind time** for this checklist schedule.

Checklist reminder for all schedule types is sent in all their completion periods before closing time. When remind time of a checklist completion period comes and a unit has not completed all checkpoints on this checklist in this iteration yet, all users who have access to complete this checklist schedule for this unit receive a reminder as a push notification on mobile app.

25. After you have set an appropriate schedule type and required time settings of its completion periods, click **DONE** button on **Checklist time schedule** pop-up to save these settings for new schedule.

This will redirect you to **Edit schedule** page.

26. Click **Edit** (**\)** icon on **Checklist access** card to select roles you want to share this schedule with.

27. After selecting required roles on Checklist access card, click **DONE** button on this pop-up to save these selections for new schedule.



_			
Che	ecklist access		
Selec	t the roles that should be able to view and complete the che	cklist when it's scl	heduled for their unit.
•	Roles		
0	01 SuperAdmin		
0	02 Executive Team		
0	03 Support Team		
	04 Regional Managers		
	05 Site Manager / Franchisee		
	06 Store Supervisor		
	07 PTs / Instructors		22
	08 Receptionists		لے ا
			¥
		CANCEL	DONE
L			

28. Click **Edit** (**\**) icon on **Unit assignment** card to select units you want to share this schedule with.

29. On Unit assignment card, select areas and business areas you want to share this schedule with.

This schedule will be shared to units from these areas and business areas once you save it. <u>See the user guide for **Sharing selection**</u>

	Unit assignment	
	The checklist will run on all units from the selected areas and/or individually selected	ected units.
29(a)	Business areas	29(b) = Areas
	<ul> <li>Corporate owned</li> </ul>	0 UK
	Franchised	Finland
	Mobile Units	0 USA
	□ NW	Sweden
	Individual units In addition to the general assignment above, you can assign individual units too. Add unit	
	<ul> <li>Support Office</li> <li>Birmingham</li> <li>Edinburgh</li> <li>Northampton</li> </ul>	Remove unit
	Newquay	Add_nit CANCEL DONE

30. You can also share a schedule with individual units directly by adding these units in its unit assignment settings.



31. After selecting required units, areas and business areas on Unit assignment card, click **DONE** button on this pop-up to save these selections for new schedule.

32. Now, review all settings on **Edit schedule** page and click **Save** button to save this checklist schedule.

Once you save a new checklist schedule, users associated with selected roles from selected units can complete it for their current unit in iterations defined from Checklist time schedule settings. See the user guide for **Checklist 2.0 completion** 

### Complete a Checklist 2.0 for your Current unit

#### Complete a Checklist 2.0 on Mobile app

Once you have logged in to your account on **Chainformation companion 2.0** app, follow these navigation steps to **complete** a **checklist** for your current unit.

There are two ways to access current checklists available for completion on the app.

1. Go to Checklists 2.0 module from your profile menu.

This will redirect you to the **Current checklists** filter on Checklists 2.0 module where you can find all checklists available for completion.

- 2. You can also access current checklists available for completion from your **To-do** feed.
- 3. Click on the checklist you want to complete for your current unit.



https://chainformation.com/userguides



4. If you have access to two or more business units from your profile, there might be a scenario when your role has access to a checklist schedule but this schedule is not shared with your current unit. You cannot complete this checklist until you switch to an appropriate unit that has access to its connected schedule.

You can switch your current unit to another unit from your profile menu or checklist completion page of schedule from item 4.

Daily gym opening     Dischecklist schedule is not shared with your	Stateside Burgers Support Account (4(b)) Birminoham	
current unit. Please switch to an appropriate unit before completing this checklist. Switch unit	Home	
0%     Completed     0     4(a)       Not completed     11	Profile Edinburgh	
	Page: Helsinki	
Reception	😰 Files New York	
Turn on lights and check that front dask is	Form: Support Office	
organized	> 🖻 Tasks Titan 5 Views	
	🗩 Forum	
Computers and point-of-sale systems	Our organisation	
Start up, log in Check for errors and messaries	Checklists 2.0	
	Audit checklists	
	Scan unit QR-code	
Restocking Restock promotional materials, brochures, and	Settings Version 1.4.0(315)	
water at reception.	Contact support	
	〔→ Logout	

5. On the selected checklist page, complete all the checkpoints on this checklist.

- Daily opening routines	:	÷	:	← :
Completed 2 Not completed 4	ו	Trash cans Emptied and clean		Cooler temperature
o be completed prior to opening each morning	J	ОК <b>1</b> Not OK		42.6 °F Please enter a number
Kitchen		Write a comment		Write a comment
Cleaning condition	>	Comment is mandatory 9		Take photo Attach file Attachment is mandatory
Cooler temperature	>	Checkpoint log Today 13:21 Support Account Added comment: Testing		
Entrance		Today 13:21 Support Account Reported this as: 1 Not OK		
How long, in minutes, it takes from an order to delivery at checkout.	>			
Please enter a number		Submit		Submit



6. You can answer the status checkpoints as OK or Not OK.

7. You can answer the measurement checkpoints by entering a numeric value in the defined unit for these checkpoints.

8. You will have to scan the **QR-code** of a checkpoint before you can answer it if the **QR-code is mandatory** to answer this checkpoint. <u>See the user guide for **Checkpoint conditions**</u>

9. You have to add a comment/attachment on a checkpoint if comment and/or attachment is mandatory to answer this checkpoint.

**Remember**, when attachment is mandatory for a checkpoint answer, images and videos you add on this checkpoint can't be older than 6 hours and must have an embedded timestamp. An error shows up when you try to add an image or video as a mandatory attachment that lacks a timestamp or the timestamp is too old.



10(a). When you answer a status checkpoint as OK or Not OK from the checkpoints list, your answer is saved immediately.

10(b). If this is a measurement checkpoint or status checkpoint with a mandatory condition, click the **Submit** button on its details tab after entering all required data.

11. You can view your recent activity on a checkpoint under the **Checkpoint log** heading on its details tab.

12. You can **clear** saved or unsaved answer on a checkpoint from its options.

13. You can mark a checkpoint **not applicable** for your current unit if it's irrelevant for this unit.



**Note:** You must have **Share** right on at least the local level of Checklists 2.0 module to mark a checkpoint not applicable for your unit. <u>See the user guide for **Roles administration**</u>

14. You can see the number of completed and incomplete checkpoints on a checklist in **Checkpoints status** card on its completion page.

#### Complete a Checklist 2.0 on Web

1. Follow the navigation steps demonstrated in the previous section to access **Checklists 2.0** module on your Chainformation website platform.

You will be redirected to the **Current checklists** filter on Checklists 2.0 page where you can find all checklists available for completion.

- 2. You can also access current checklists available for completion from your **To-do** list.
- 3. Click on the checklist you want to complete for your current unit.



Follow navigation steps 4-13 in the user guide for **Checklist 2.0 completion on mobile app** to complete checkpoints on a checklist.

**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. <u>Refer to item 8 in the user guide for **Checklist 2.0 completion on mobile app**</u>

			2 s	Support Account 🔻 Edinburgh
	< Daily opening routines		_	:
	🖶 Start date & time : 2024-12-31, 08:00 (UTC +0)	End date & time : 2024-12-31, 11:59 (UTC +0)	14	
ն	Cleaning condition	÷	Checkpoints status	
	OK Not OK		67% Completed Not completed	4
9	Comment* Looks good Comment and attachment is mandatory	0	Deviations	1
11	Today, 11:45		Save	
	Support Account Added attachment:			
	Today, 11:45 Support Account		15	
	Added comment: <i>Looks good</i> Today, 11:45		04:17	
	Support Account Reported this as: 🔮 OK		0	
		_		
	Cooler temperature		Clear checkpoint	
<del>ر</del> ه	QR-code scan is mandatory for this checkpoint - us     Answer	se the app in order to scan the code $13 \rightarrow \Box$	Not applicable for this unit	
	36.9 °F			
<del>د</del> ن	<ul> <li>Please enter a number</li> </ul>	in Ri .		

15. Checkpoints on a checklist 2.0 are not saved individually on web. So, once you have answered all the checkpoints, click the **Save** button on its completion page to submit these checkpoints for your current unit.

**Note:** You can also save a checklist without completing all of its checkpoints and complete the pending checkpoints later.

#### Start an On-demand checklist for your Current unit

**Remember**, an on-demand checklist schedule has no pre-defined Start date and time. So, it never starts automatically for any unit. Instead, you have to start it manually for your current unit when required.

Once you have accessed **Checklists 2.0** module on mobile app or web, follow these navigation steps to start an on-demand checklist for your unit.

- 1. Go to the **On-demand checklists filter** on Checklists 2.0 page.
- 2. Click the on-demand checklist you want to start for your current unit.



Q, Search					Support /	locount *	0	← Checklists	2.0 :
🖶 Home	Checklists 2.0 Templates Man	age schedules Reports					+	On-demar	nd
Pages						Search	Q		
5m Files								Q Search	╝┾╞
Forms	Shared with me U1 Name	Checkpoints status	J↑ Schedule name	J↑ Start date & time	↓↓ End date & time	11 Last edited			
🕑 Tasks	Carrent checklis.	unds	3/5 Fire safety schedule	On-demand	Closes 2 hours after start	2024-05-25 Anders Hall	I	Fire safety rounds	0%
D Forum	Non current che	]						Cn-demand	
🚊 Cur organisation 📘	On-demand che								
(0) <sup>O</sup> System setup	Expired checklis								
Lill User activity									
Checklists 2.0							-	× Filters	
Audit checklists									
Send SMS								Categories	
Collapse menu								Shared with me	
								<ul> <li>Created by me</li> </ul>	
								O Non current checklists	
								On-demand checklists	
							0	Res	Apply

3. Click the **Start** button on this checklist completion page to see completion period duration of this on-demand schedule.

	Support Account - Edinburgh
< Fire safety rounds	:
Start the on-demand checklist.	Start
Checkpoints to keep a unit prepared for possible fire	Checkpoints status
Checkpoints	Completed 0     Not completed 5
Does this unit have clear and accessible escape routes?	
	Save
Is firefighting equipment available on required places?	
Does this unit have fully working, regularly tested fire alarm?	

4. Switch **ON** the **Start toggle** button to see the Start and End time of the on-demand checklist iteration you are going to start.

4. Click the **Start** button again to confirm the start of this on-demand checklist iteration for your current unit.

		3	Support Account Edinburgh
Fire safety rounds			:
Start on-demand checklist 4 Start date & time: 2024-12-31, 12:04 Once you start this checklist, it cannot be undone.	End date & time: 2024-12-31, 14:04	<b>≁</b> 5	
Checkpoints to keep a unit prepared for possible fire		Checkpoints status	
Checkpoints		0% Completed	0 rted 5
Does this unit have clear and accessible escape routes?		Save	
is firefighting equipment available on required places?			

Once you start an on-demand checklist, it's also shown in the Current checklists filter. You and your selected colleagues from your unit can complete checkpoints on this checklist before End time of this ongoing iteration.