

Chainformation Admin User Guide

(Checklists 2.0 Module)

Last Updated: December 31, 2024

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.

Create a New Checklist 2.0	1
Create a Checklist Schedule	17
Complete a Checklist 2.0 for your Current unit	25
Complete a Checklist 2.0 on Mobile app.....	25
Complete a Checklist 2.0 on Web.....	28
Start an On-demand checklist for your Current unit.....	30

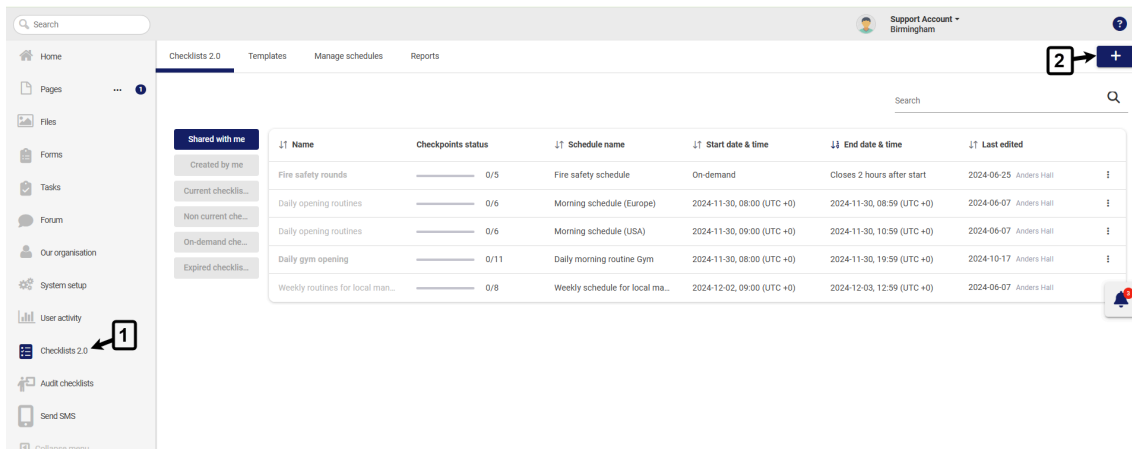
Create a New Checklist 2.0

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. [See the user guide for Roles administration](#)

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.

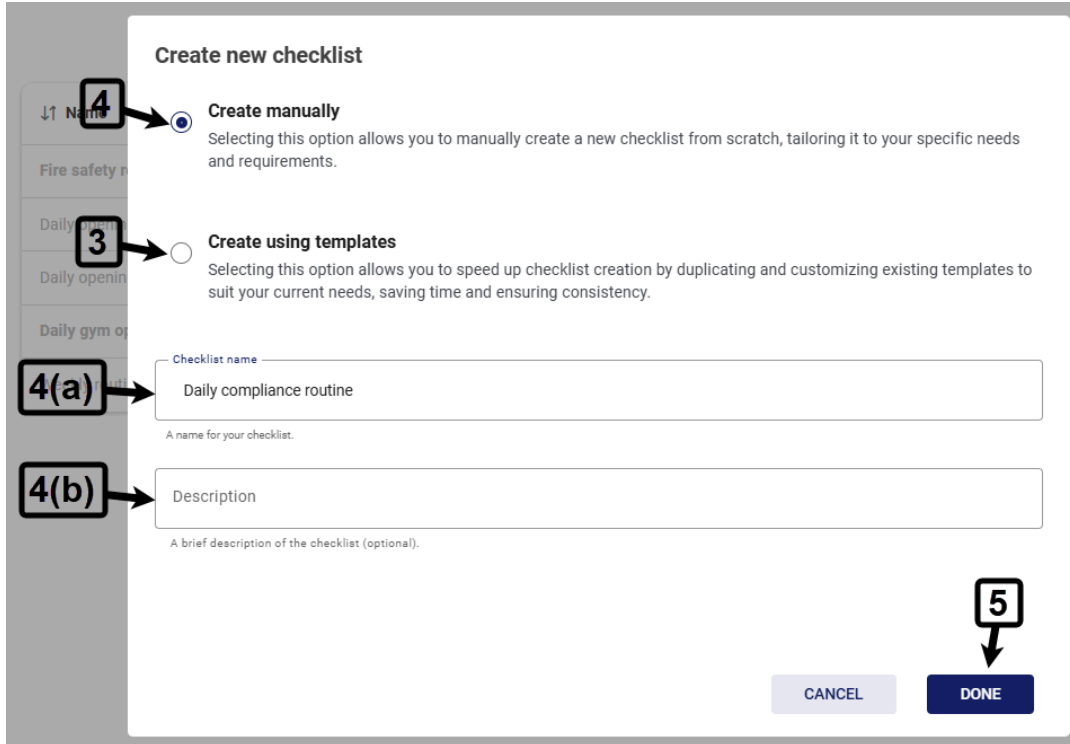


The screenshot displays the Chainformation web interface. On the left, a sidebar menu contains various navigation options, with 'Checklists 2.0' highlighted and marked with a red box and the number '1'. The main content area shows the 'Checklists 2.0' page with a table of checklists. In the top right corner of this page, there is a '+' icon for creating a new checklist, also marked with a red box and the number '2'. The table below lists several checklists with columns for Name, Checkpoints status, Schedule name, Start date & time, End date & time, and Last edited.

LT Name	Checkpoints status	LT Schedule name	LT Start date & time	LT End date & time	LT Last edited
Fire safety rounds	0/5	Fire safety schedule	On-demand	Closes 2 hours after start	2024-06-25 Anders Hall
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
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
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
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

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.



The screenshot shows a 'Create new checklist' dialog box. It has two radio button options: 'Create manually' (selected) and 'Create using templates'. Below these are two text input fields: 'Checklist name' with the text 'Daily compliance routine' and 'Description'. At the bottom right are 'CANCEL' and 'DONE' buttons. Numbered callouts point to: 4 (radio button), 3 (radio button), 4(a) (text input field), 4(b) (text input field), and 5 (DONE button).

3. You can choose to **create a new checklist using a template**. [See the user guide for Checklists 2.0 templates](#)

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.

Translation

Swedish

English

German

Checklist name
Daily compliance routine

A name for your checklist.

Description
A brief description of the checklist (optional).

18 → **Checkpoints**
Manage checkpoints, sections, conditions and actions.
This checklist has 0 checkpoints

6 → **Compliance threshold**
Set a compliance threshold
This checklist has no compliance threshold

Sharing settings
Share the checklist for scheduling and editing in selected areas or with individual units.
Currently shared with 0 areas and 0 units

15 → **QR-codes**
List of QR-codes for export
QR codes disabled.

Understanding Checklist 2.0 and its schedules

- **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.
- **Checklist schedule:** After a checklist is shared, it can be set to run at specific times, intervals, and during certain operational periods. Schedules assign the checklist to the appropriate units and roles responsible for completing it.

1. **Create Checklist 2.0** - Create the checklist by incorporating relevant 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.
4. **Share Checklist schedule** - Assign to the units and roles that will complete the checklist.

Save

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.

7 → **Enable compliance threshold**

8 → **Set a compliance threshold**
100%

Non-compliance action
If compliance falls outside of the approved limit set action

9 → **Add action**

14 → **DONE**

CANCEL

Currently shared with 0 areas and 0 units

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.

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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. Refer to items 26-27 in this user guide to learn how to set **checkpoints scoring**

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

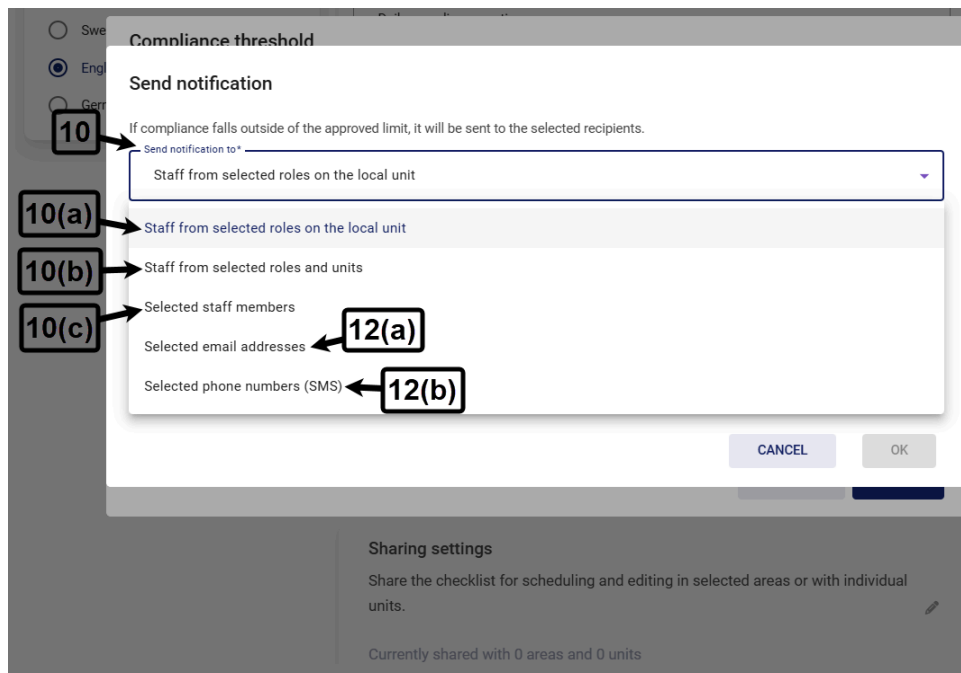
9. Click on **Add action** button to open **Send notification** editor.

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.

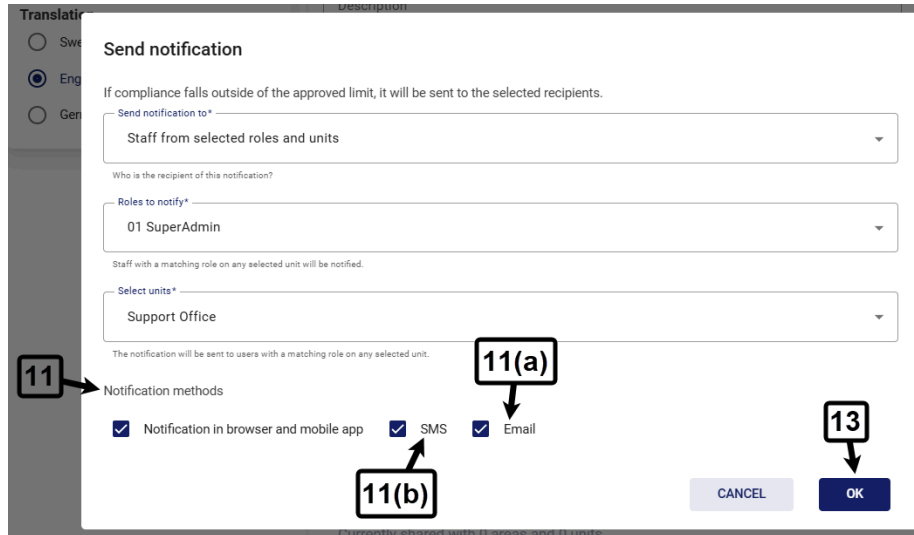
10(c). You can also choose “**Selected staff members**” to receive non-compliance notification from this checklist.



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.

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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.

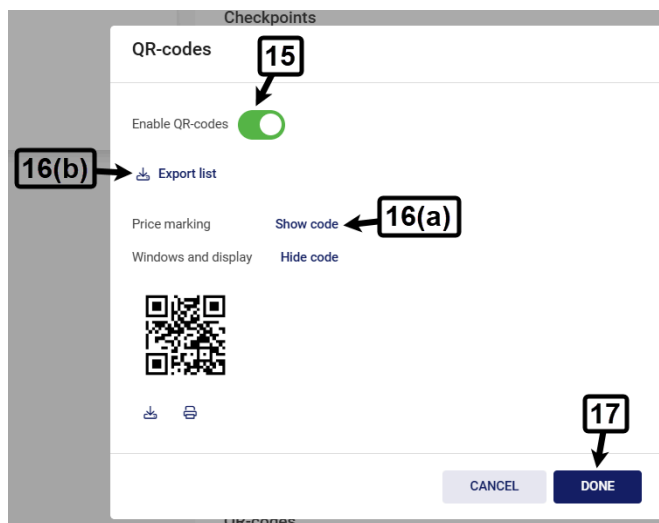
13. Once you have added all required details on the Send **notification** editor, click the OK button to save this automated non-compliance alert.

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. Refer to item 30 in this user guide to learn how to add **mandatory QR-code condition** for checkpoints

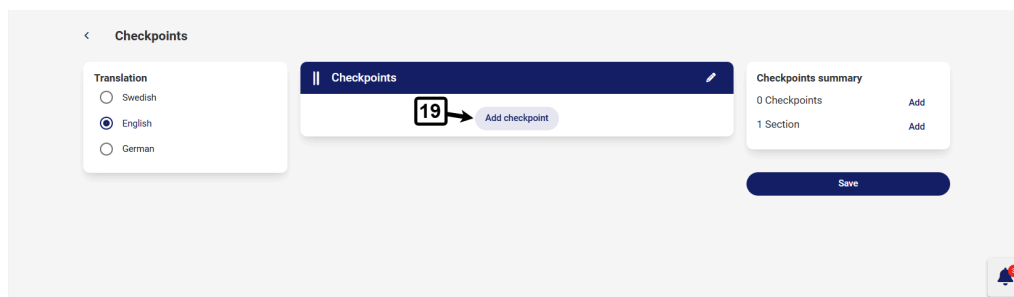


16. Once you have added at least one checkpoint on this checklist, you can **view** and **Export list** of all checkpoints on this card. Refer to items 19-48 on this user guide to learn how to **add new checkpoints** in a checklist

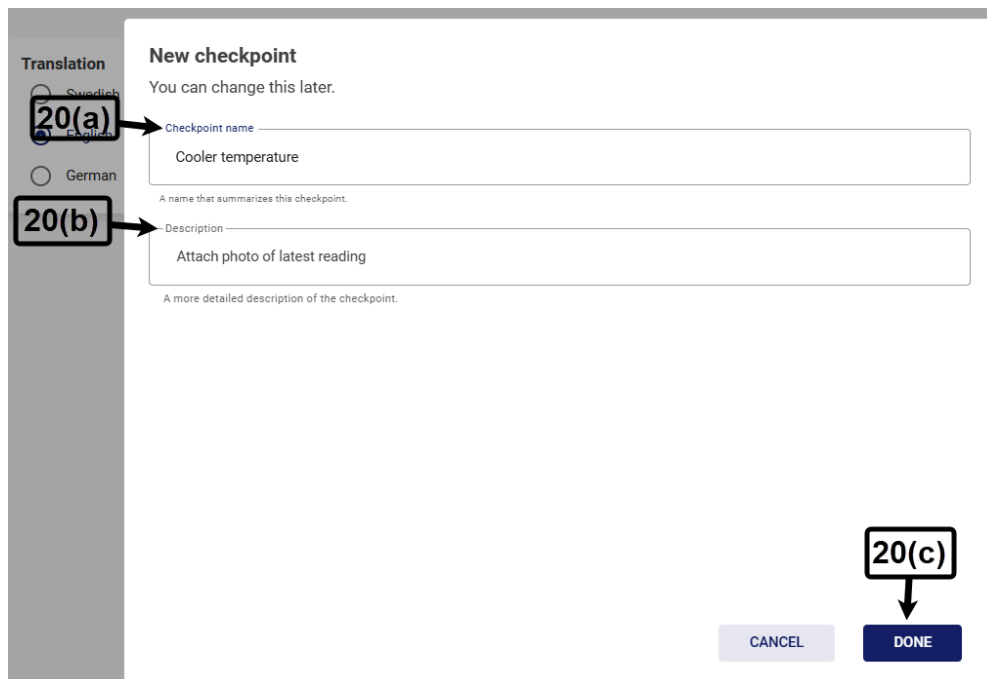
17. Click on **DONE** button on **QR-codes** card after enabling QR-codes for this checklist to save this setting.

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.



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



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

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^oF and 42.7^oF 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^oF 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^oF is Not OK.

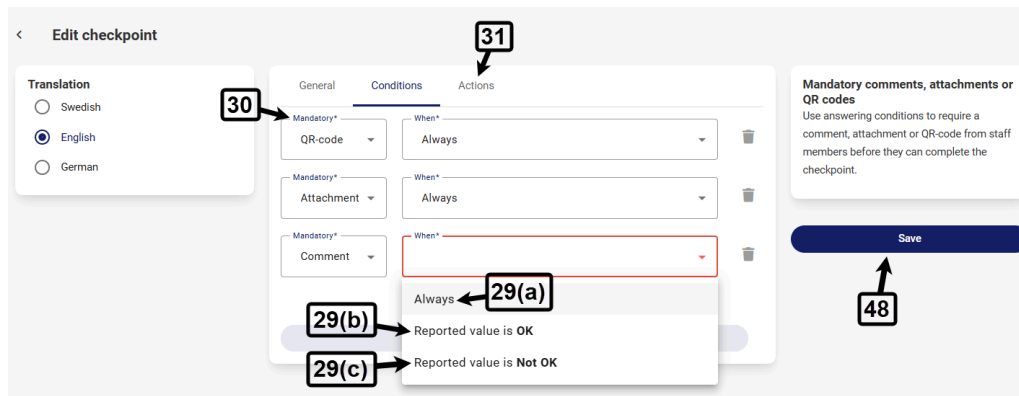
Remember, all undefined numbers that don't fall under any of listed value ranges are considered Not OK. So, you should add at least one OK range for a measurement checkpoint.

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. Refer to items 6-8 in this user guide to learn how to **enable compliance threshold** for a checklist

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.



29(a). You can add “**attachment/comment is always mandatory**” condition.

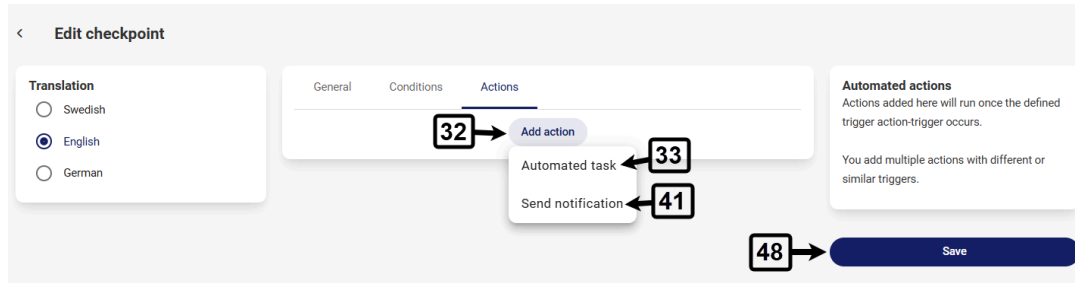
29(b). You can add “**attachment/comment is mandatory when answer is OK**” condition.

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. Refer to item 15 in this user guide to learn how to **enable QR-codes** for a checklist

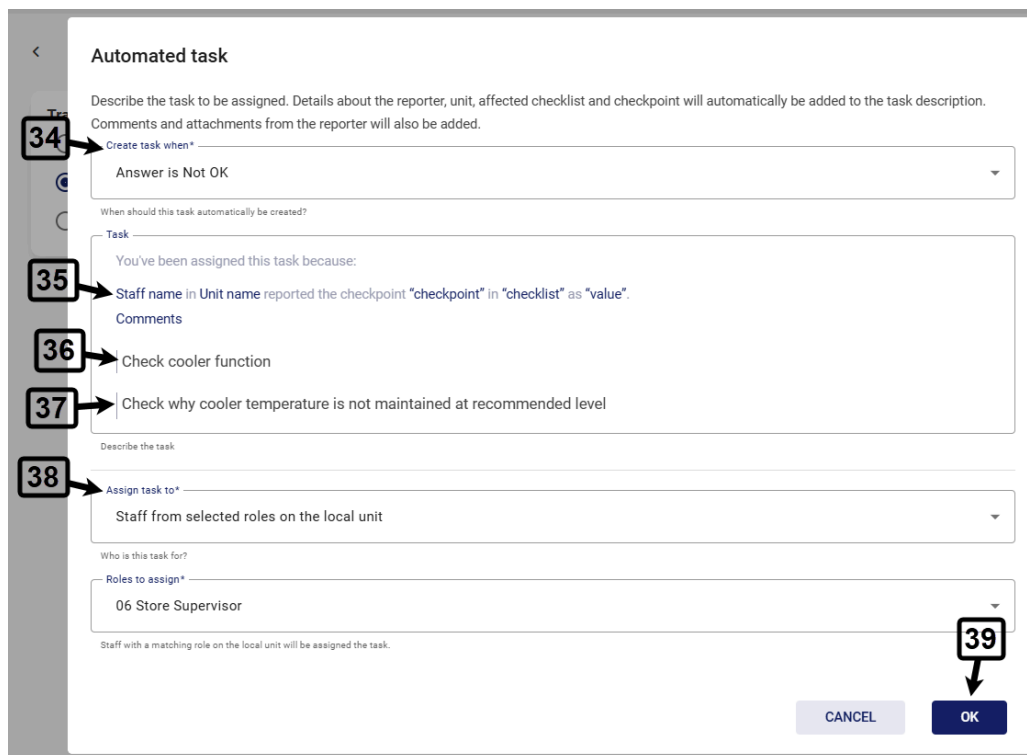
31. Now, go to **Actions** tab to add automated actions for this checkpoint.



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.



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.

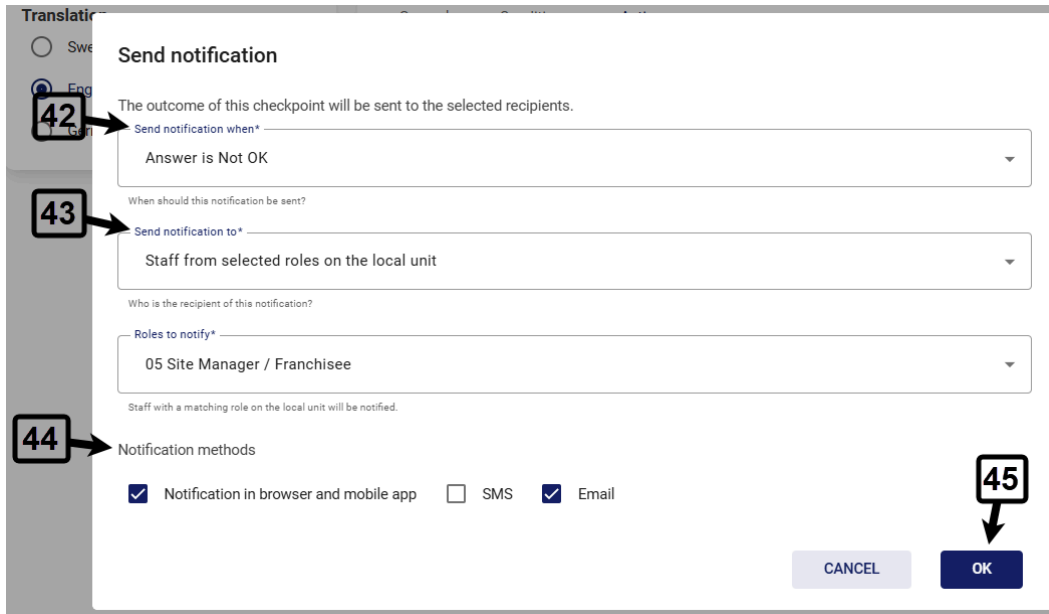
42. Choose when this notification should be sent to selected colleagues.

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.



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).

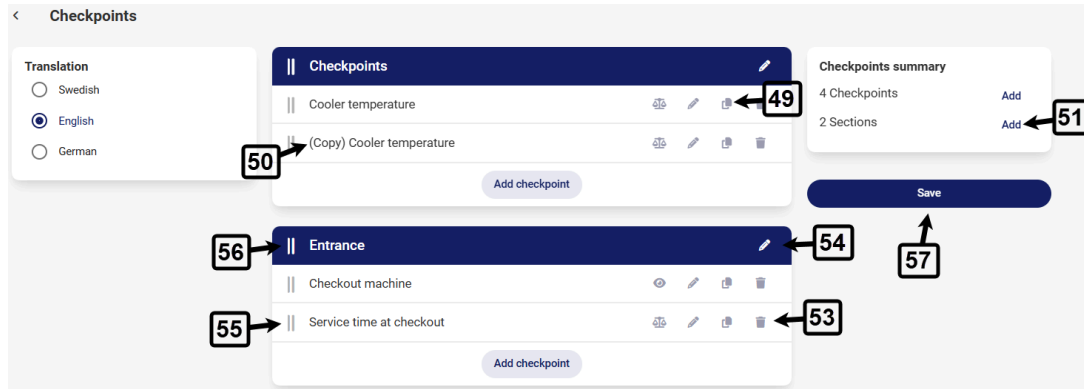
45. You can also choose to send this notification to **Selected email addresses** or **phone numbers (SMS)** that are not even associated with any user in your organisation.

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.



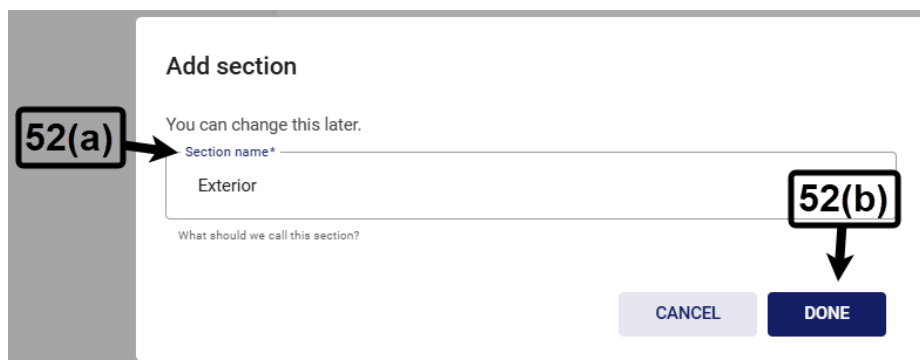
49. You can also create copies of added checkpoints by clicking **Copy checkpoint** button next to its name.

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.



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.

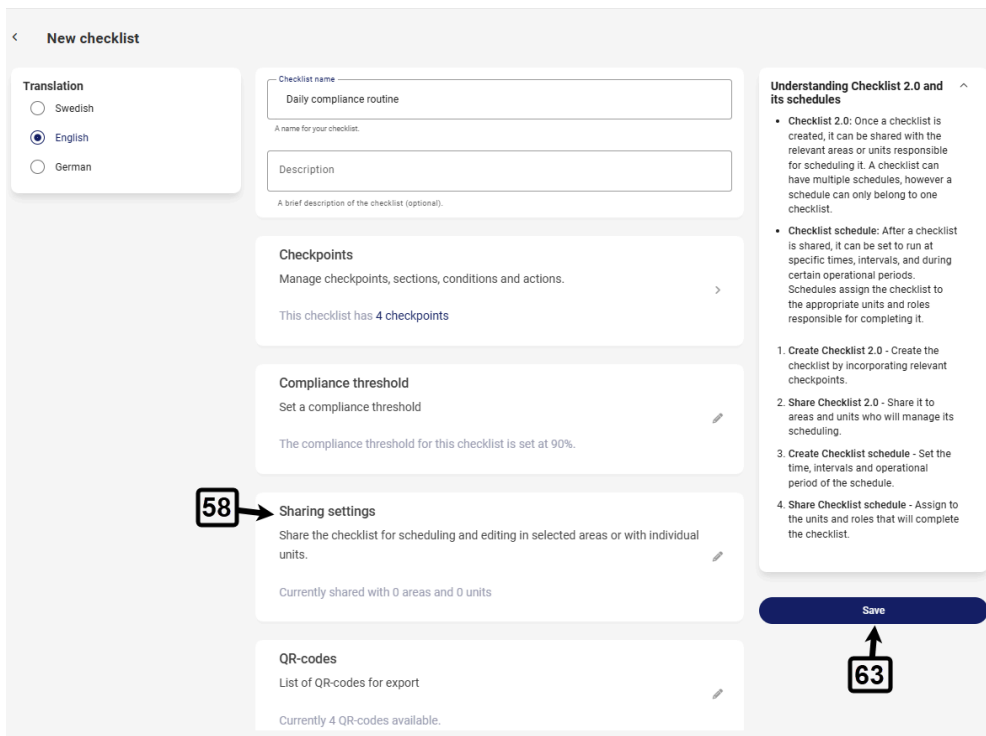
54. You can delete an individual checkpoint by clicking **Bin** icon next to its name.

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.

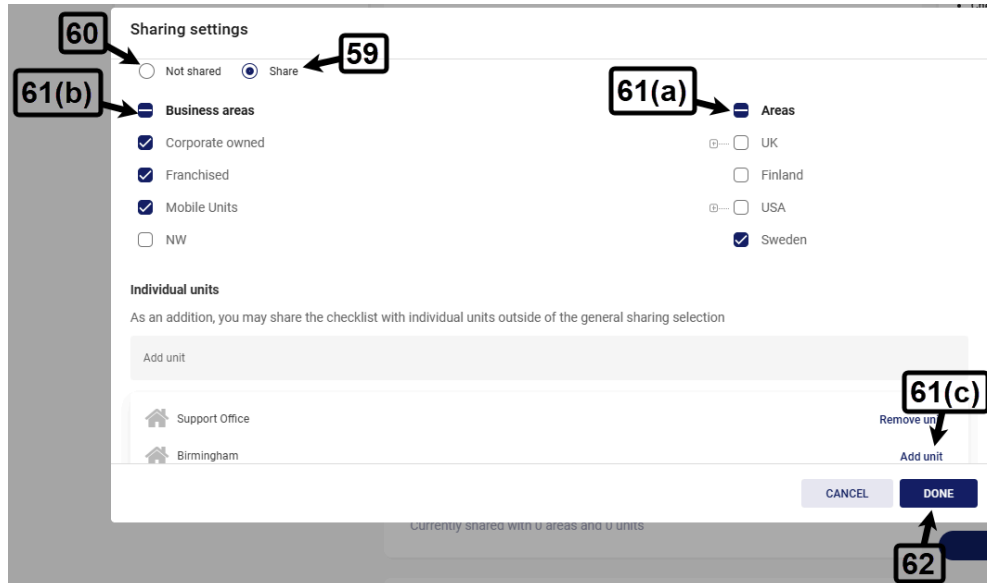


58. Click on **Sharing settings** card to set sharing preferences for this checklist.

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.



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. See the user guide for **Create a checklist schedule**

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

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

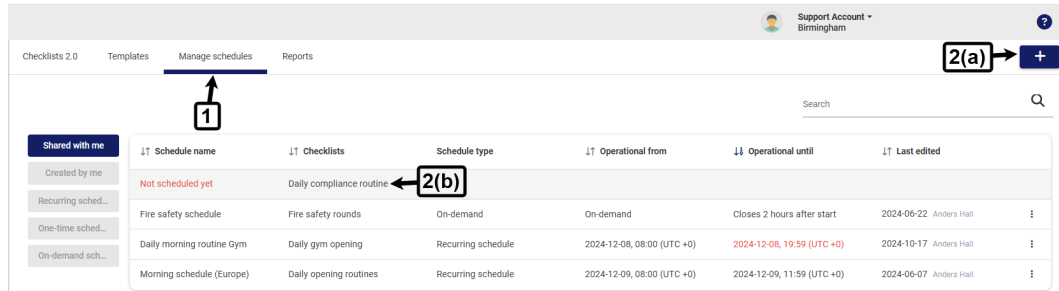
63. Review all checkpoints, settings for this checklist and click **Save** button on **New checklist** page to save it.

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.



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

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.

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.

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.

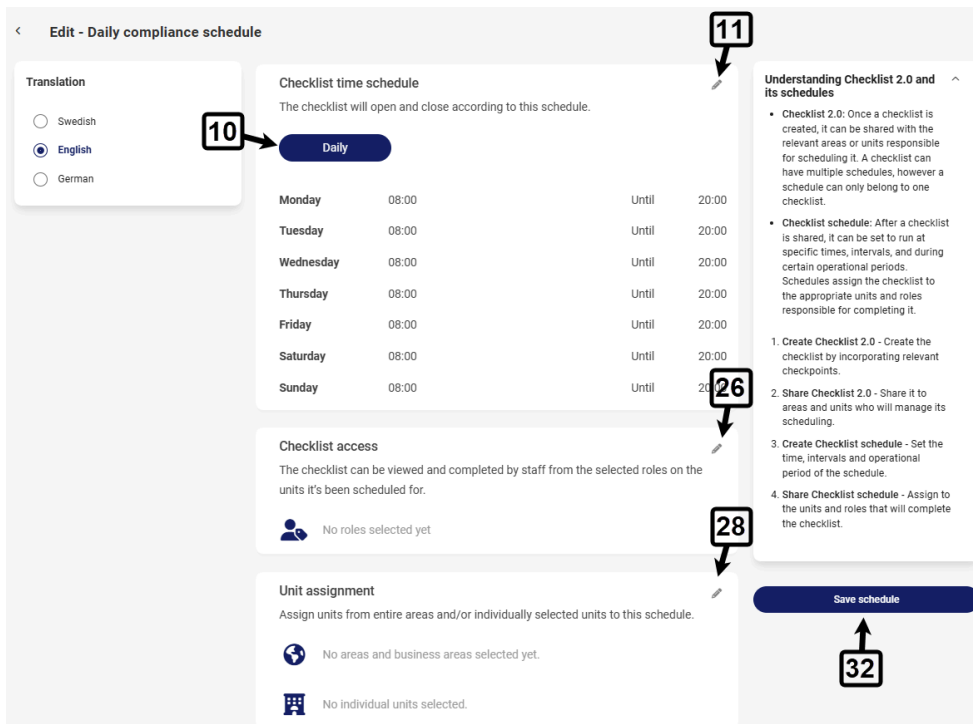
8(a). If you don't want other users to see report for this checklist schedule, you can deselect **"Allow other users to view the report for this schedule"** option in **Report setting**.

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. Refer to items 11-23 in this user guide 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.

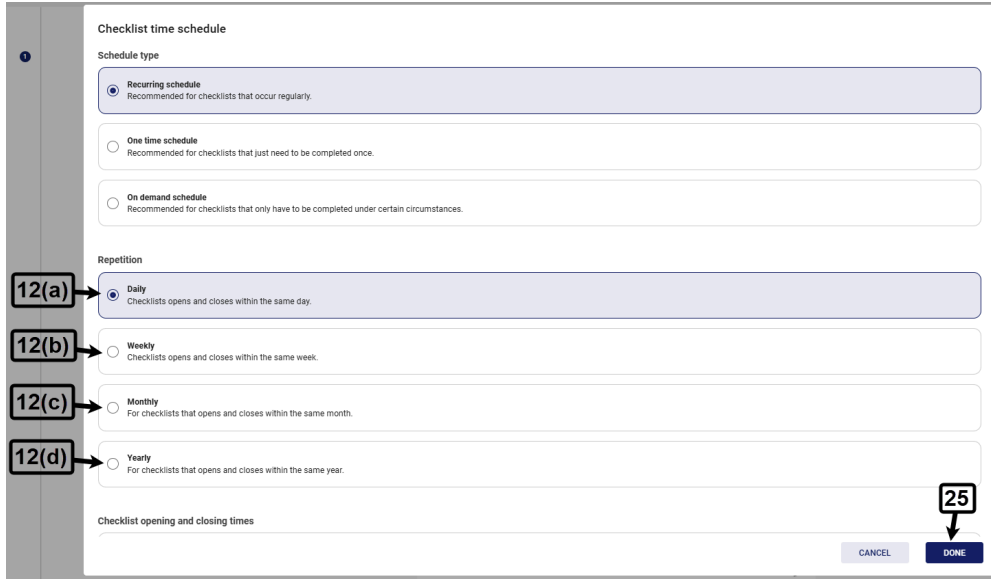
Remember, when a checklist schedule is set to **Not operational** status or has expired i.e. its operational period has ended, it’s not available for completion unless its operational period settings are updated.



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

1

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) Daily
Checklists opens and closes within the same day.

12(b) Weekly
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

25

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.

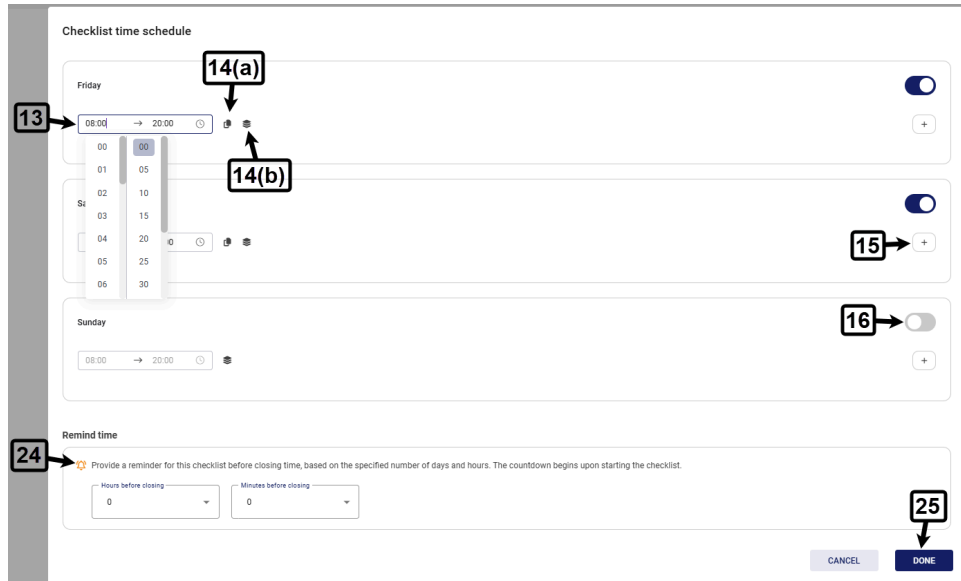
14(a). You can copy Start, End time of a completion period to next period of this schedule by clicking **Copy to next** button.

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.



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.

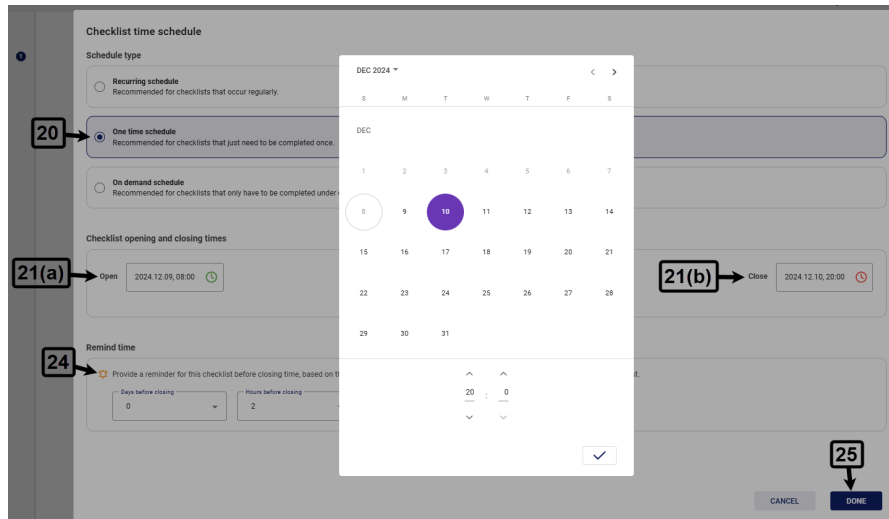
18. When you set a schedule to **recurring monthly**, its completion period starts 08:00 AM on first day each month and ends 08:00 PM on last day of this month.

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.

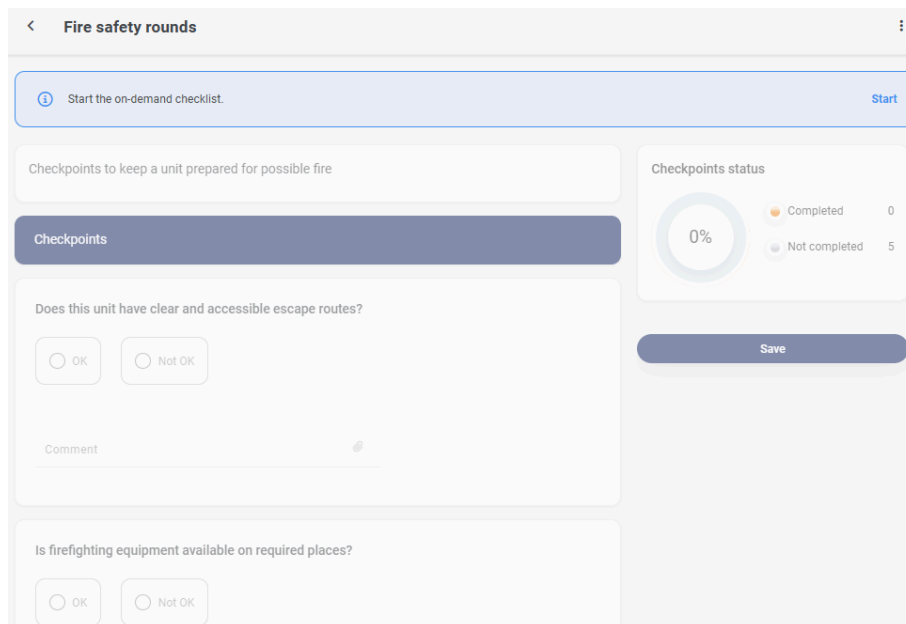
You can change time settings of weekly, monthly, yearly completion periods, add additional periods and disable a period by following navigation steps demonstrated in items 13-16.

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.

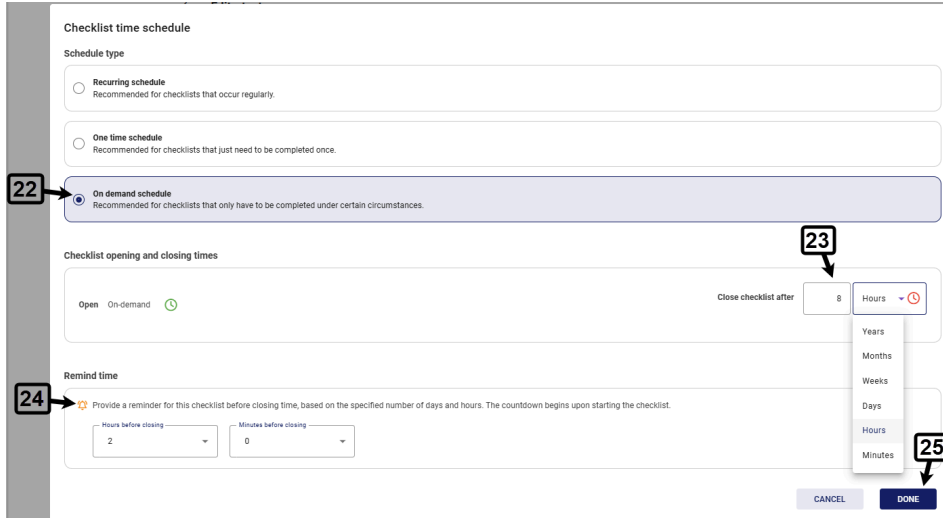


22. When you set a schedule type to **On demand**, this checklist schedule has no pre-defined Start date and time. So, it never starts automatically for any unit. Instead, users who have access to complete this checklist schedule starts it manually on its completion page for their current unit when required.



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.




The screenshot shows the 'Checklist time schedule' configuration page. It includes three radio button options for 'Schedule type': 'Recurring schedule', 'One time schedule', and 'On demand schedule'. The 'On demand schedule' option is selected and highlighted with callout 22. Below this is the 'Checklist opening and closing times' section, which has an 'Open' dropdown set to 'On-demand' and a 'Close checklist after' field set to '8' with a unit dropdown menu open, showing options from 'Hours' to 'Minutes'. Callout 23 points to the unit dropdown. At the bottom of the form is the 'Remind time' section, which has a checkbox and two input fields for 'Hours before closing' (set to 2) and 'Minutes before closing' (set to 0). Callout 24 points to the 'Remind time' section. At the bottom right of the form are 'CANCEL' and 'DONE' buttons. Callout 25 points to the 'DONE' button.

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.

Checklist access

Select the roles that should be able to view and complete the checklist when it's scheduled for their unit.

Roles

- 01 SuperAdmin
- 02 Executive Team
- 03 Support Team
- 04 Regional Managers
- 05 Site Manager / Franchisee
- 06 Store Supervisor
- 07 PTs / Instructors
- 08 Receptionists

27 ↓

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. See the user guide for **Sharing selection**

Unit assignment

The checklist will run on all units from the selected areas and/or individually selected units.

29(a) → **Business areas**

- Corporate owned
- Franchised
- Mobile Units
- NW

29(b) → **Areas**

- UK
- Finland
- USA
- Sweden

Individual units

In addition to the general assignment above, you can assign individual units too.

Add unit

- Support Office
- Birmingham
- Edinburgh
- Northampton
- Newquay

Remove unit

30 → Add unit

Add unit

31 ↓

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.

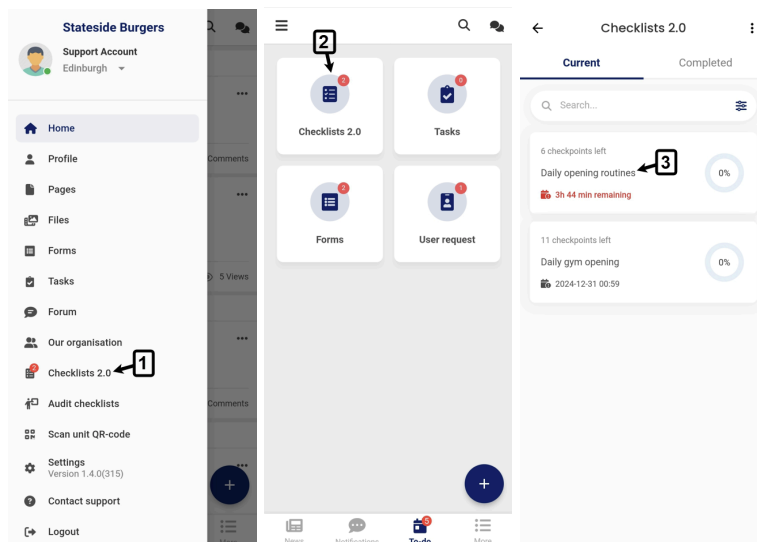
There are two ways to access current checklists available for completion on the app.

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.

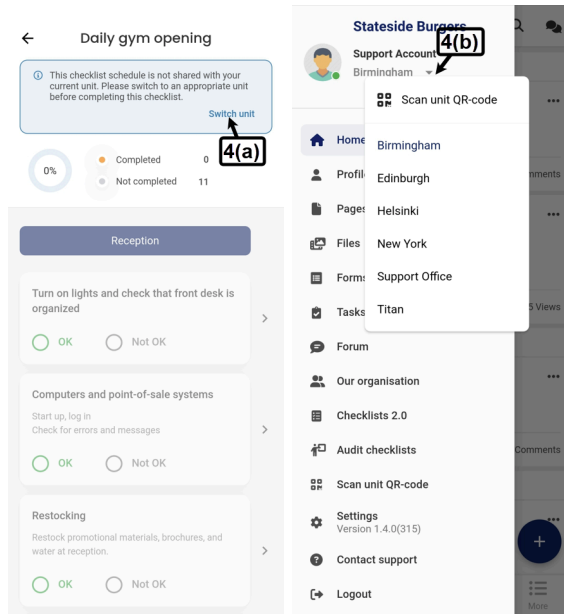
2. You can also access current checklists available for completion from your **To-do** feed.

3. Click on the checklist you want to complete for your current unit.

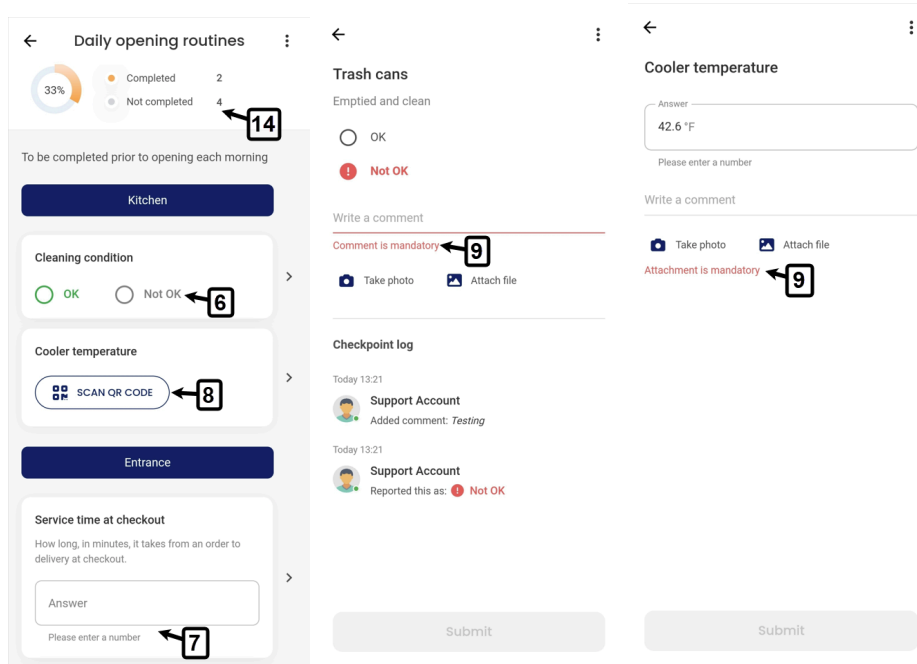


4. If you have access to two or more business units from your profile, there might be a scenario when your role has access to a checklist schedule but this schedule is not shared with your current unit. You cannot complete this checklist until you switch to an appropriate unit that has access to its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

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

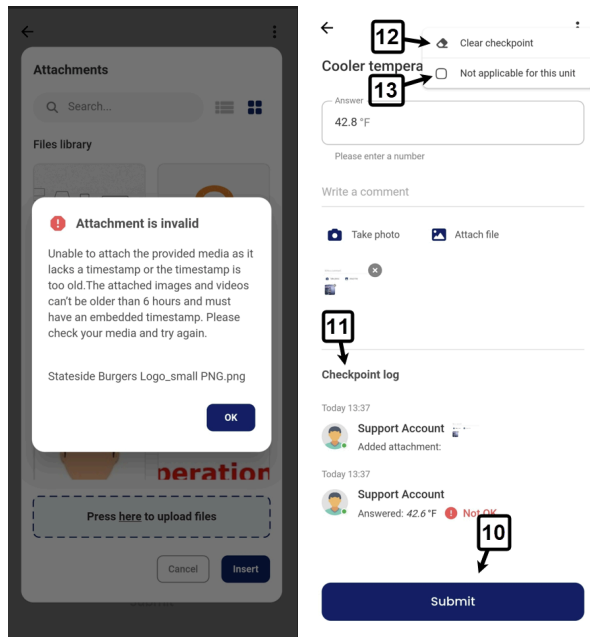


5. On the selected checklist page, complete all the checkpoints on this checklist.



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. See the user guide for **Checkpoint conditions**
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. See the user guide for **Roles administration**

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

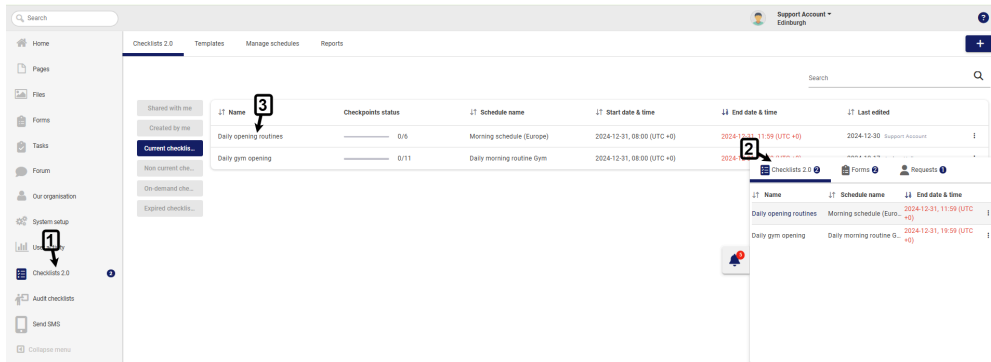
Complete a Checklist 2.0 on Web

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.

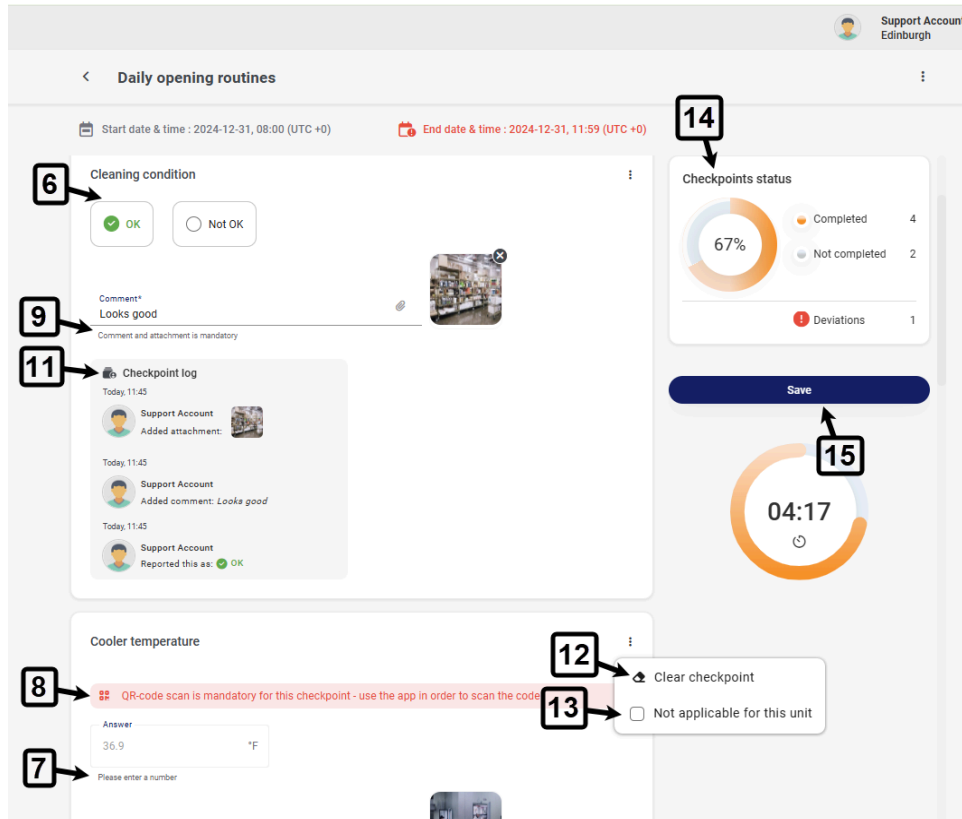
2. You can also access current checklists available for completion from your **To-do** list.

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



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.

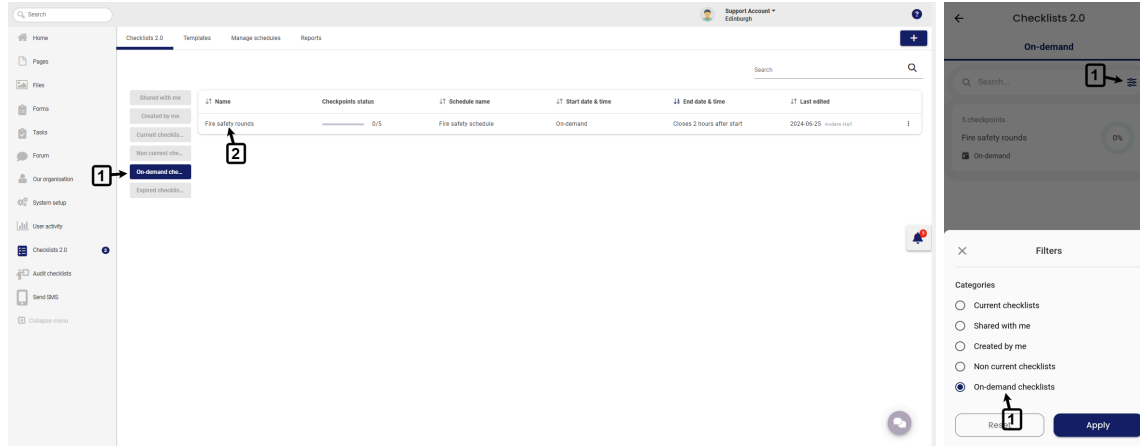
Note: You can also save a checklist without completing all of its checkpoints and complete the pending checkpoints later.

Start an On-demand checklist for your Current unit

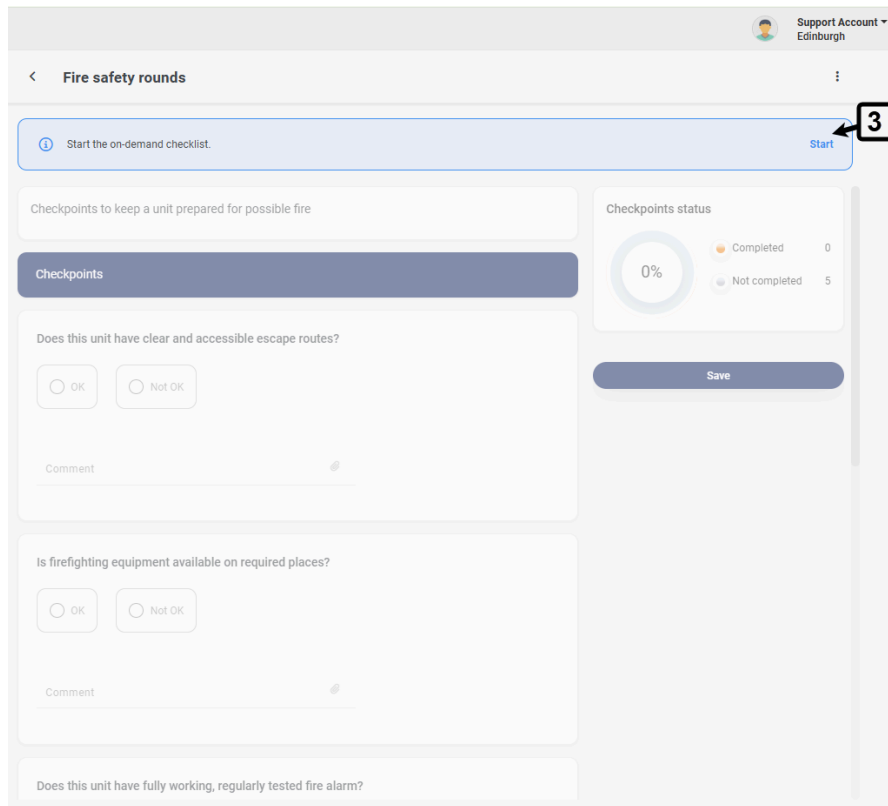
Remember, an on-demand checklist schedule has no pre-defined Start date and time. So, it never starts automatically for any unit. Instead, you have to start it manually for your current unit when required.

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.

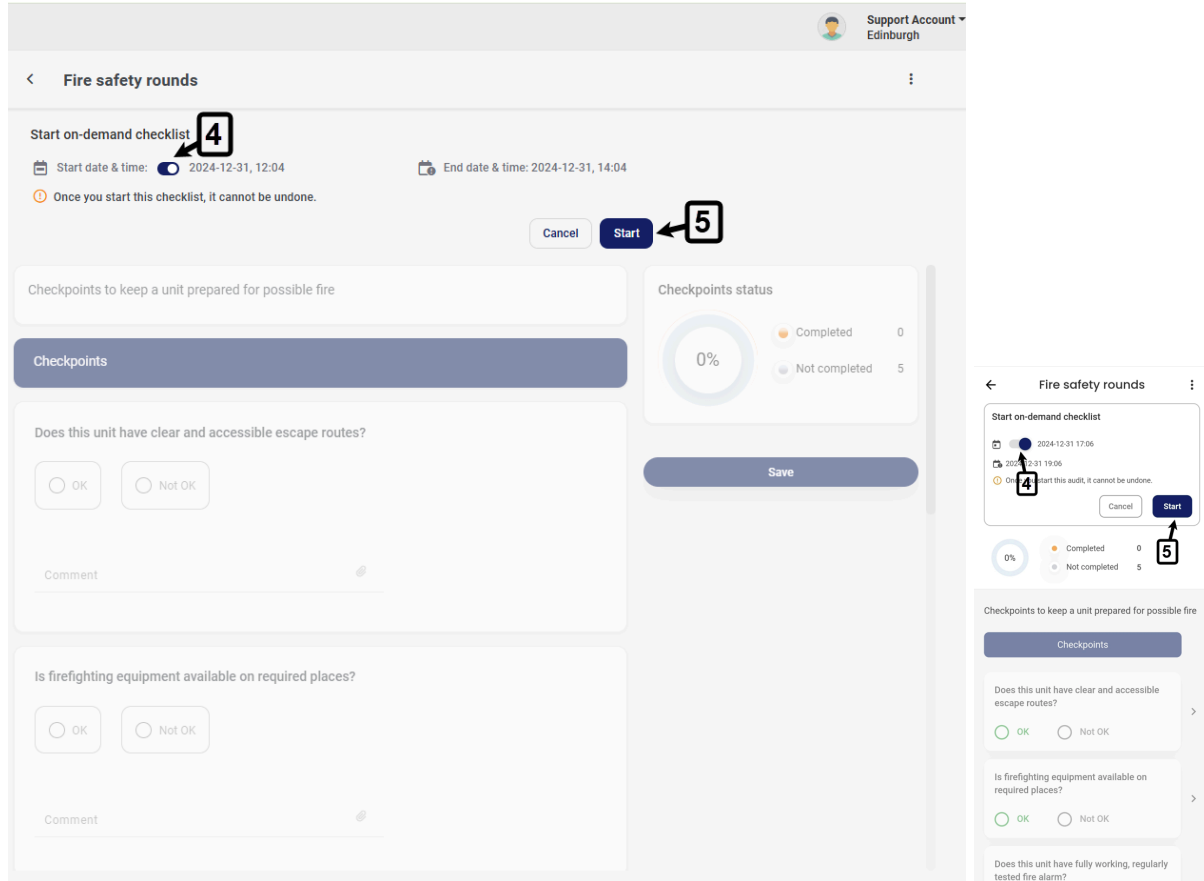


3. Click the **Start** button on this checklist completion page to see completion period duration of this on-demand schedule.



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.



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.