

Chainformation Admin User Guide

(Audit Checklists Module)

Last Updated: February 17, 2025

Welcome to the **Chainformation** user guide. In this manual, we will learn how to create audit checklists, schedules and conduct audits of different units in your organisation.

Audits checklists have almost identical functionality as compared to Checklists 2.0. The main purpose of separating audits from regular checklists is to allow only users with an appropriate access level to schedule and conduct audits of different units. So, local staff from these units can't interfere in completion of audit checkpoints and data collected from a checklist run as an audit of a unit is not mixed up with regular checklists shared with this unit.

NOTE to SUPER ADMIN: *You must first make the proper settings for local, central and global levels of **Audit checklists** and **Audit reports** functions in your **system setup** to control which **Roles** in your organisation are allowed to conduct audits of different units, manage audit checklists, schedules and reports. [See the User Guide for Roles Administration](#)*

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

Create a New Audit Checklist	2
Create an Audit Schedule	4
Conduct Audit of a Unit	8
Audit checklist options	11

Create a New Audit Checklist

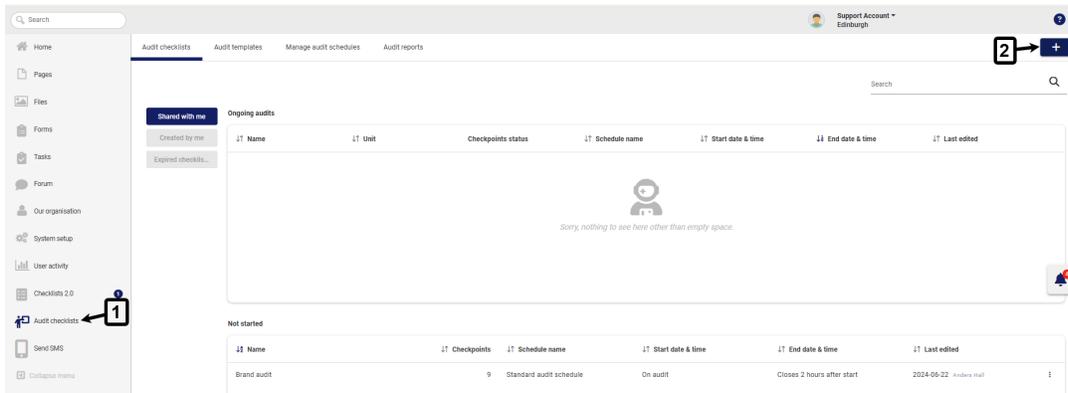
Once you have logged in to the **Chainformation** platform, follow these navigation steps to **create a new audit checklist**.

Note: You must have **Administrate** right on at least local level of Audit checklists module to create a new audit checklist. [See the user guide for Roles administration](#)

1. Click the **Audit checklists** button in the left-side menu to open the Audit checklists tab.

Note: You cannot create or edit **Audit checklists** on the **Chainformation** mobile app due to screen space restrictions. Therefore, you must log in to the **Chainformation** website platform to

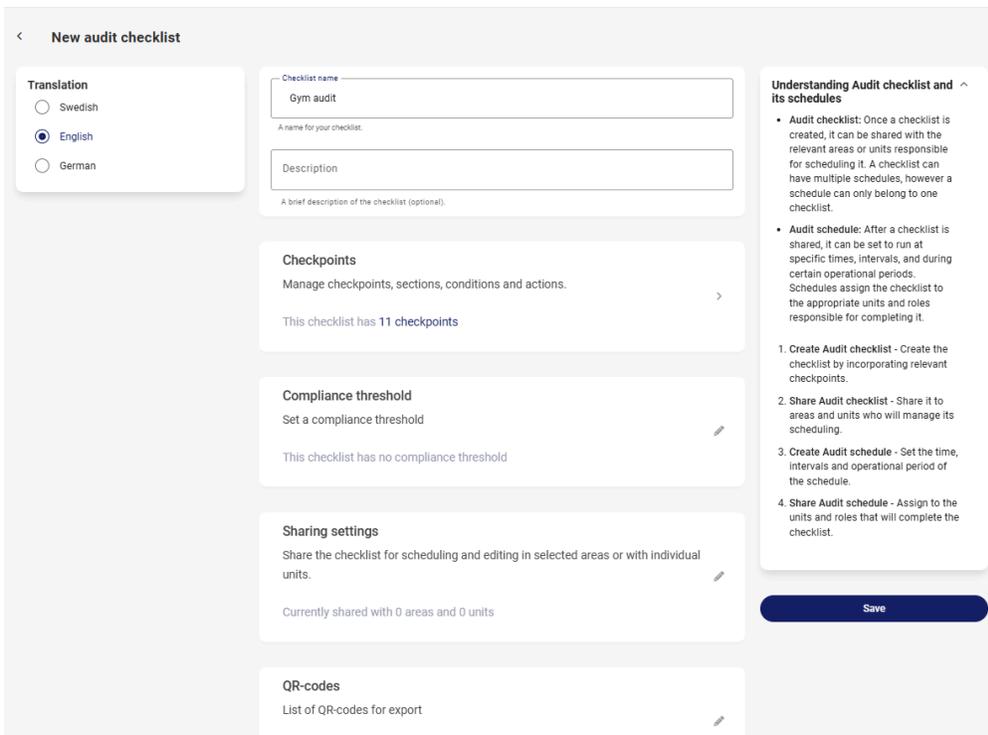
create a new audit checklist or edit a saved checklist. However, users with appropriate rights can easily access, start and complete a scheduled audit in the mobile app.



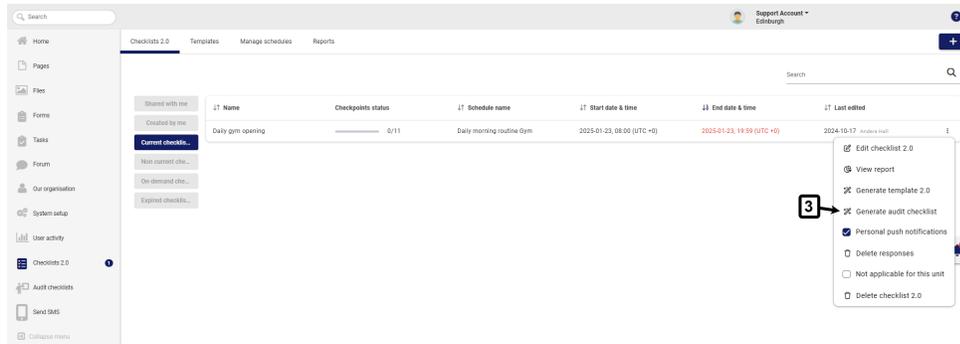
2. Click the (+) icon in the top-right corner of the **Audit checklists** page to create a new audit.

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

You can create the new audit checklist from an audit template or manually following the navigation steps demonstrated in [the user guide on how to create a checklist 2.0](#).



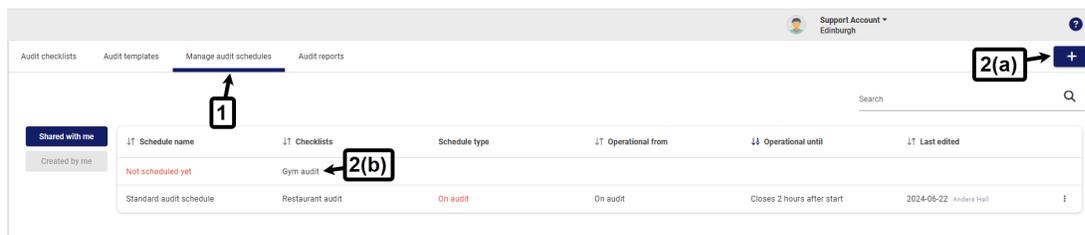
3. You can also create an audit checklist from a checklist 2.0 by clicking the **Generate audit checklist** option for this checklist on the **Checklists 2.0** table.



Similar to creating a checklist from a template, when you choose to create an audit checklist from a checklist 2.0, this checklist name, checkpoints and compliance settings are copied to the new audit checklist.

Create an Audit Schedule

1. Follow the navigation steps demonstrated in the previous section to access the **Audit checklists** module and go to **Manage audit schedules** tab on this module to schedule an audit.



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

You cannot create or edit **Audit schedules** on the **Chainformation** mobile app. Therefore, you must log in to the **Chainformation** website platform to create a new audit schedule or edit a saved schedule. However, users with appropriate rights can easily access, start and complete a scheduled audit in the mobile app.

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

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

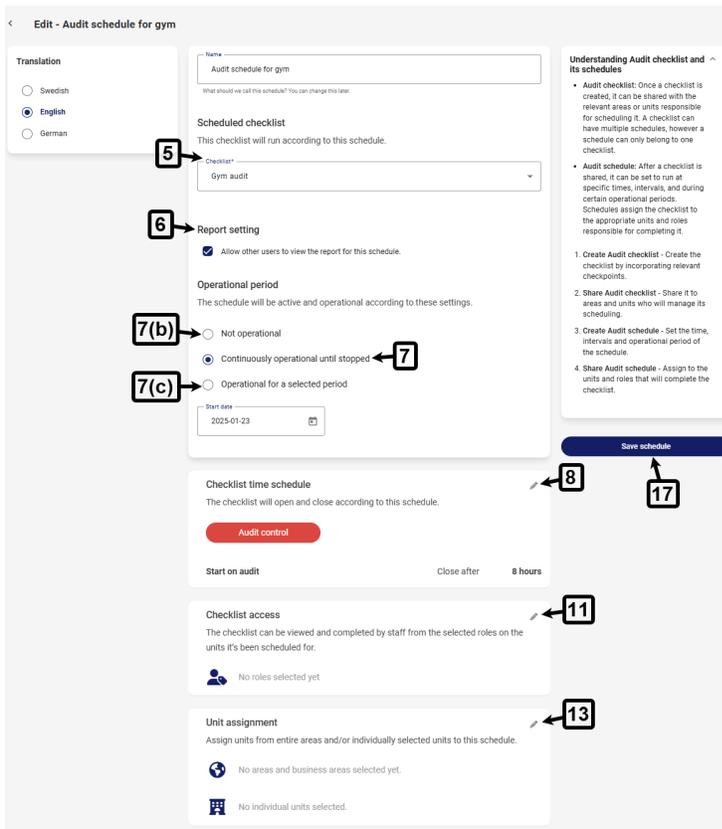
2(c). If an audit checklist is not connected with any schedule yet, you can also access **New checklist schedule** pop-up for this audit by clicking **New audit checklist schedule** option on **Audit checklists** table.

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



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

4. After entering a schedule name, click **DONE** button to go to **Edit audit schedule** page.



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

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

6. By default, all users with appropriate access level on the Audit checklists Reports module can view report for this schedule.

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

7. By default, an audit schedule is **"continuously operational until stopped"** once you have saved this schedule.

7(a). You can set an audit schedule to **"Operational for a selected period"**. This means this schedule will be available for conducting audits from operational period start date to end date of this period.

7(b). You can set an audit schedule to **"Not operational"** status from Operational period settings.

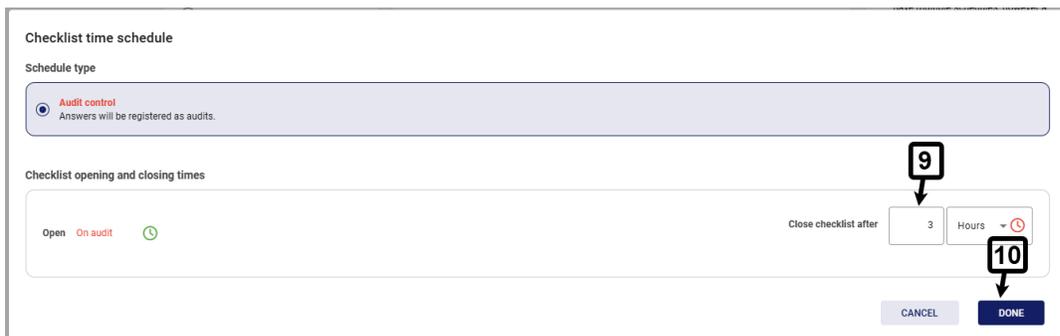
Remember, when an audit schedule is set to **Not operational** status or has expired i.e. its operational period has ended, it's not available for conducting audits unless its operational period settings are updated.

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

8. You can set End time of an audit completion period to a different value on **Checklist time schedule card**.

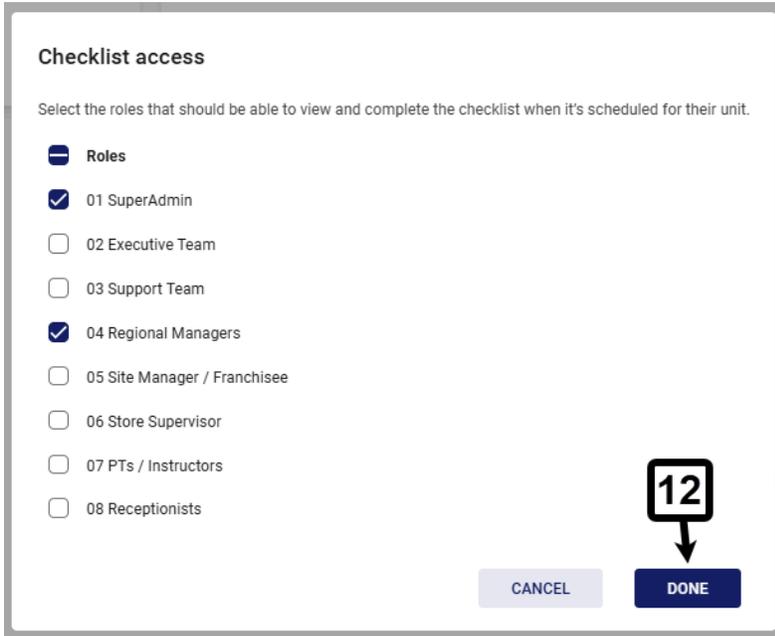
9. Select the required value for End time of each compilation period of this schedule from the **Close checklist after** field.

10. After selecting the appropriate End time setting for this audit schedule, click **DONE** button on **Checklist time schedule** pop-up to save this setting.



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

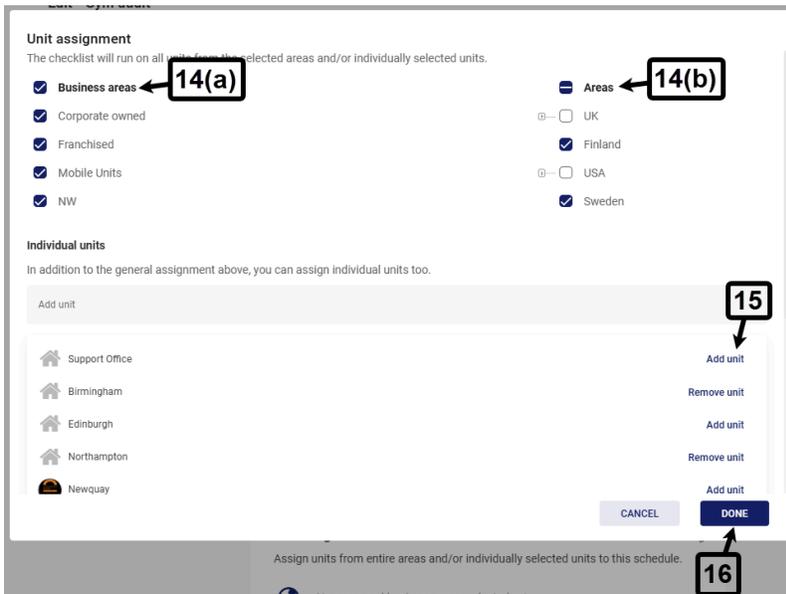
12. After selecting required roles on Checklist access card, click **DONE** button on this pop-up to save these selections for this schedule.



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

14. 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**



15. You can also share an audit schedule with individual units directly by adding these units in its unit assignment settings.

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

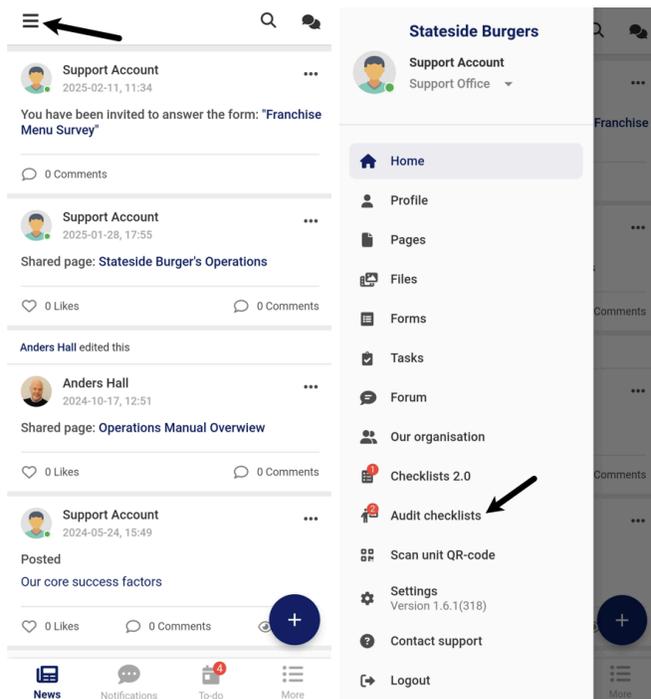
17. Now, review all settings on **Edit audit schedule** page and click **Save** button to save this schedule.

Once you save a new audit schedule, users associated with selected roles can use this schedule to conduct audits for selected units. [See the user guide for Conduct audit for a unit](#)

Conduct Audit of a Unit

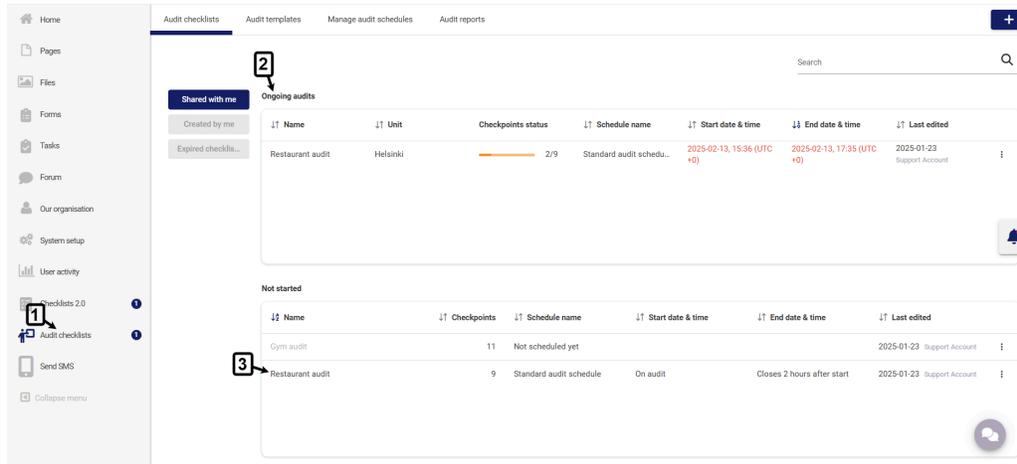
1. Follow the navigation steps demonstrated in the previous section to access the **Audit checklists** module from your profile menu on the Chainformation website platform.

If you are accessing the platform from the **Chainformation Companion 2.0** mobile app, you can open your profile menu by clicking the **hamburger** icon in the top-left corner of your mobile screen.



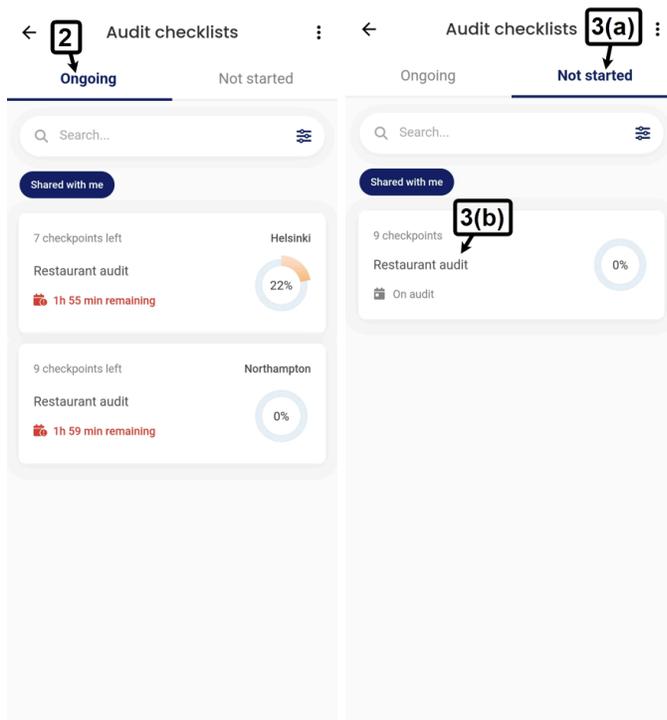
You will be redirected to the **Shared with me** filter on the Audit checklists page where you can find all audit checklists shared with you.

<https://chainformation.com/userguides>



2. In the list of **Ongoing audits**, you can find audits that are currently ongoing for different units in your organisation.

3. You can click on a scheduled audit checklist from the **“Not started”** list to start a new audit for a unit.



This will open the checklist completion page for this audit schedule.

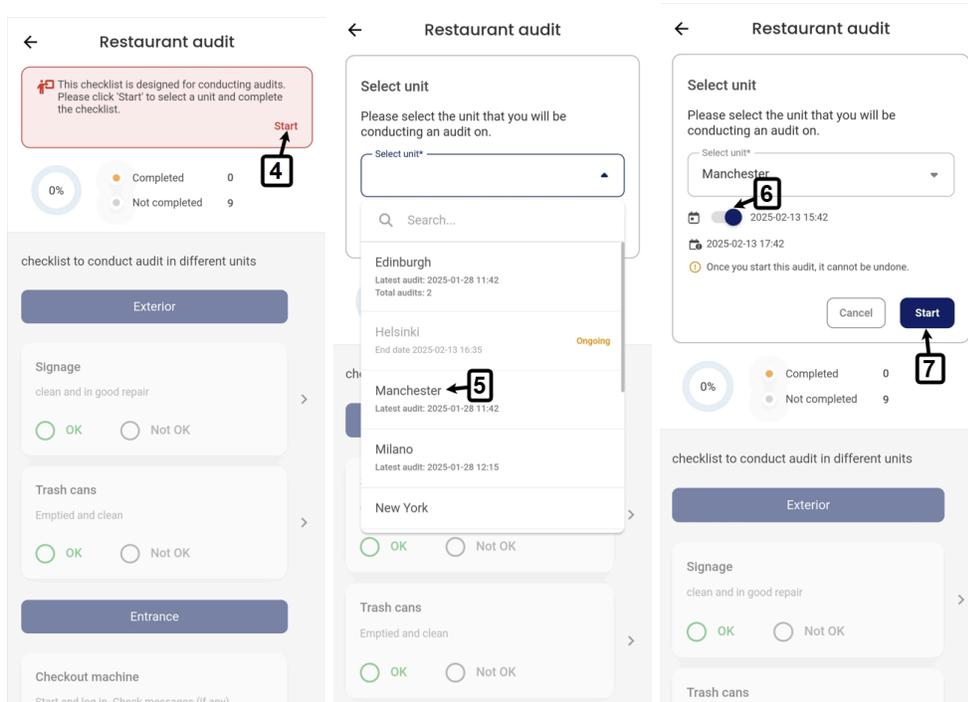
4. Click the **Start** button on this checklist completion page to get the list of units for which you can start this audit schedule.

5. Click on the unit name for which you want to start this audit.

Remember, you cannot select a unit to start a new audit when an audit iteration is already ongoing for this unit.

6. Switch **ON** the **Start toggle** button to see the Start and End time of the audit iteration you are going to start.

7. Click the **Start** button again to confirm the start of this audit iteration for the selected unit.



Now, you and your selected colleagues can complete checkpoints on this audit checklist for the selected unit before End time of this ongoing iteration. Refer to user guide for **Checklists 2.0 completion**

Audit checklist options

Users with appropriate access rights can edit an audit checklist, generate audit template, checklist 2.0, view audit report, delete responses submitted to an audit schedule and delete an audit checklist from its options menu. See the user guide for **Checklists 2.0 Set-up** for detailed instructions on these settings

Audit checklists Audit templates Manage audit schedules Audit reports

Search

Shared with me

Created by me

Expanded checklist...

Ongoing audits

IT Name	IT Unit	Checkpoints status	IT Schedule name	IT Start date & time	IT End date & time	IT Last edited
Restaurant audit	Northampton	0/9	Standard audit schedule	2025-02-17, 08:30 (UTC +0)	2025-02-17, 10:29 (UTC +0)	2025-01-23 Support Account

- Edit audit checklist
- View report
- Generate audit template
- Generate checklist
- Delete responses
- Delete audit checklist

Not started

IT Name	IT Checkpoints	IT Schedule name	IT Start date & time	IT End date & time	IT Last edited
Open audit	11	Not scheduled yet			2025-01-23 Support Account
Restaurant audit	9	Standard audit schedule	On audit	Closes 2 hours after start	2025-01-23 Support Account

Remember, no checklist opened and reminder notifications are sent for audit checklist iterations. Also, users can't make an audit checklist schedule Not applicable for a unit. So, **“Global/Personal push notifications”** and **“Not applicable for this unit”** options are not found for an audit checklist.