Chainformation Admin User Guide
(Checklists 2.0 Completion)

Last Updated: February 14, 2025

Welcome to the **Chainformation** user guide. In this version of Checklists 2.0 manual, we will learn how to complete a checklist 2.0 for your current unit and manage its relevant settings.

Remember, a checklist 2.0 is available for completion only when it's connected with at least one schedule. Please refer to the user guide for **Checklists 2.0 Set-up** to learn how to create new checklists 2.0 and schedule them for completion from different units and roles.

NOTE to SUPER ADMIN**: You must first make the proper settings for local, central and global levels of **Checklists 2.0** and **Checklist Reports** functions in your **system setup** to control which **Roles** in your organisation are allowed to complete checklists 2.0, manage their relevant settings and reports. See the User Guide for **Roles Administration

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

Complete a Checklist 2.0 for you 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.

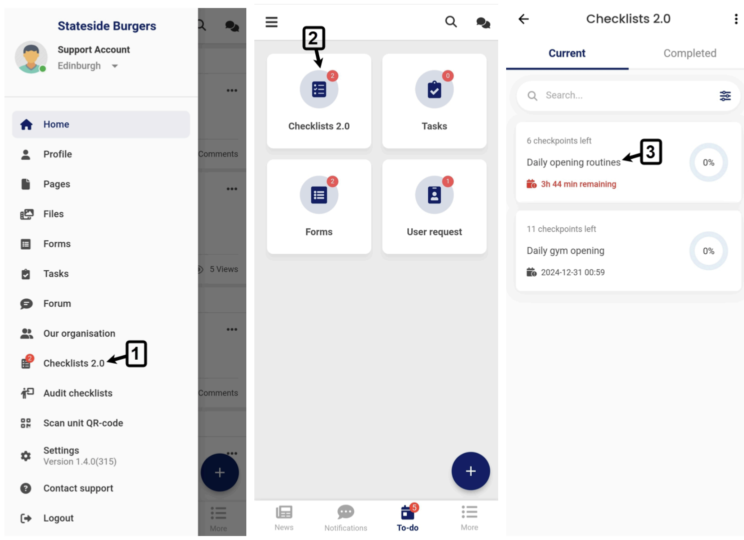
There are two ways to access current checklists available for completion on the app.

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.

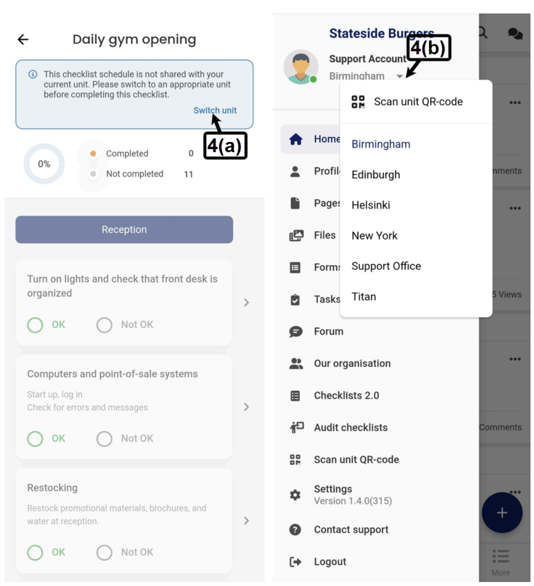
2. You can also access current checklists available for completion from your **To-do** feed.

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

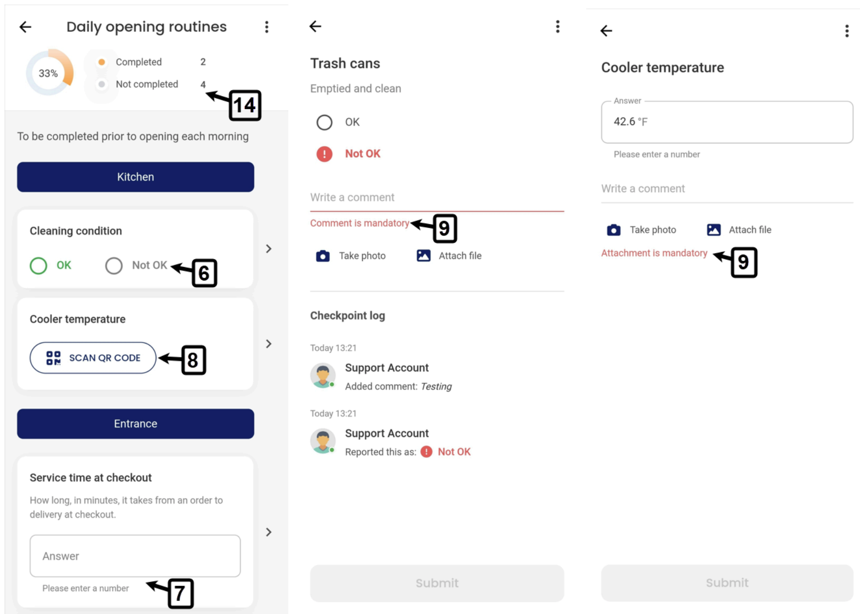


4. If you have access to two or more business units from your profile, there might be a scenario when your role has access to a checklist schedule but this schedule is not shared with your current unit. You cannot complete this checklist until you switch to an appropriate unit that has access to its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

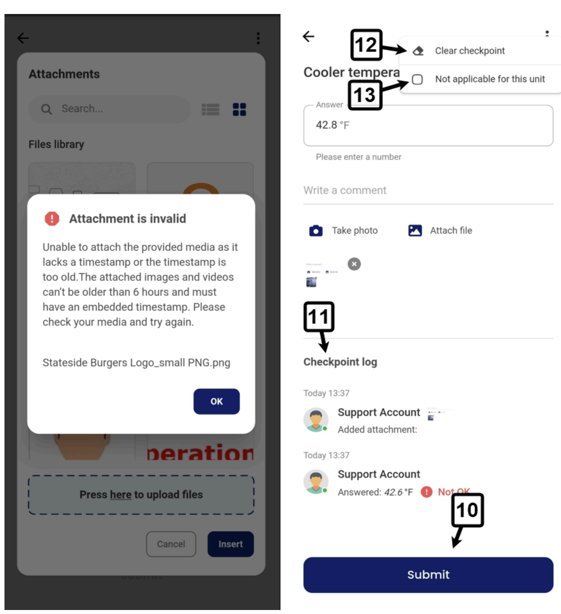


6. You can answer the status checkpoints as OK or Not OK.

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.

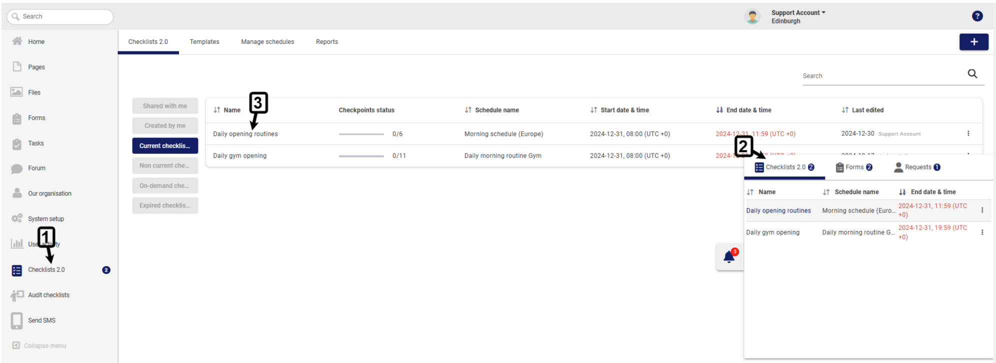
Complete a Checklist 2.0 on Web

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.

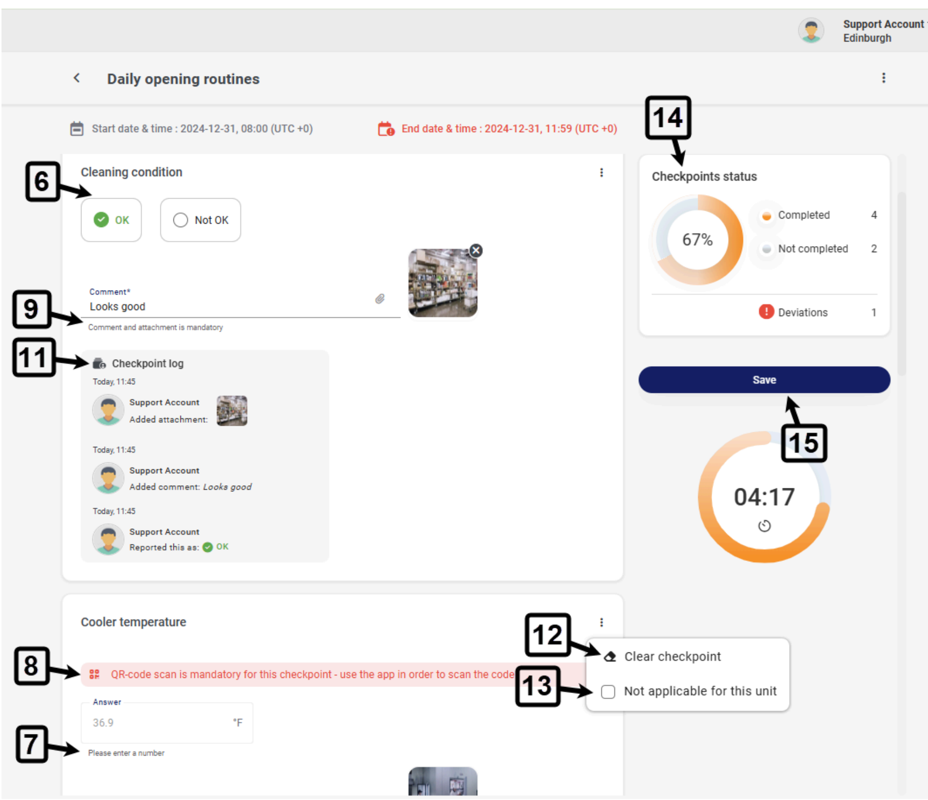
2. You can also access current checklists available for completion from your **To-do** list.

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 the 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.

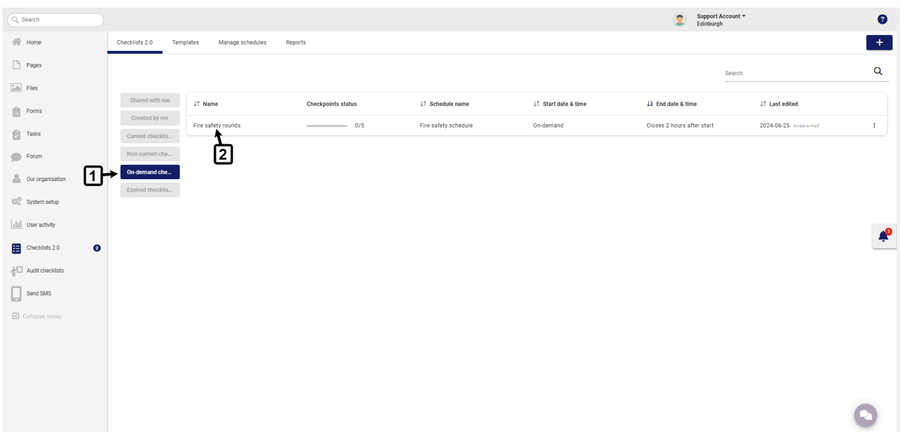
Start an On-demand checklist for your Current unit

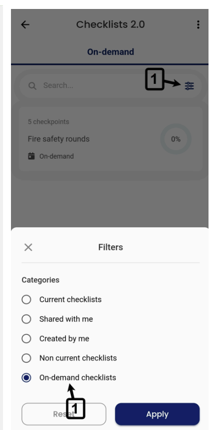
Remember, an on-demand checklist schedule has no pre-defined Start date and time. So, it never starts automatically for any unit. Instead, you have to start it manually for your current unit when required.

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.

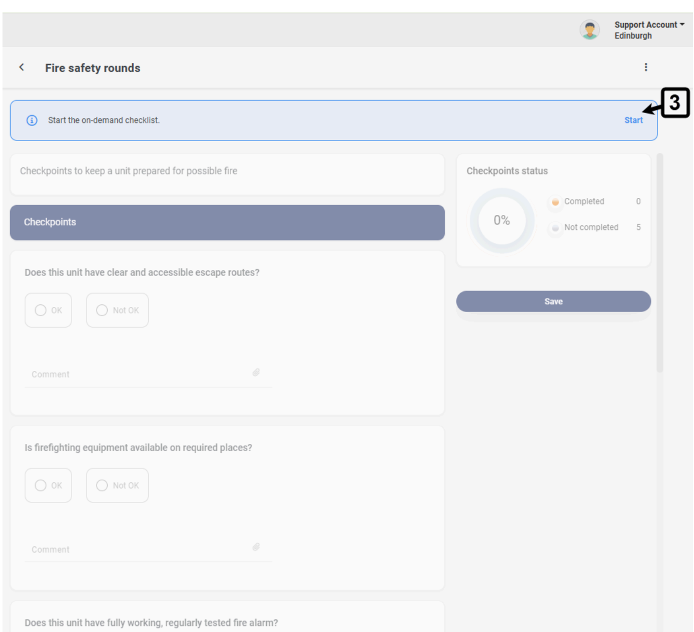
1. Go to the **On-demand checklists filter** on Checklists 2.0 page.

2. Click the on-demand checklist you want to start for your current unit.



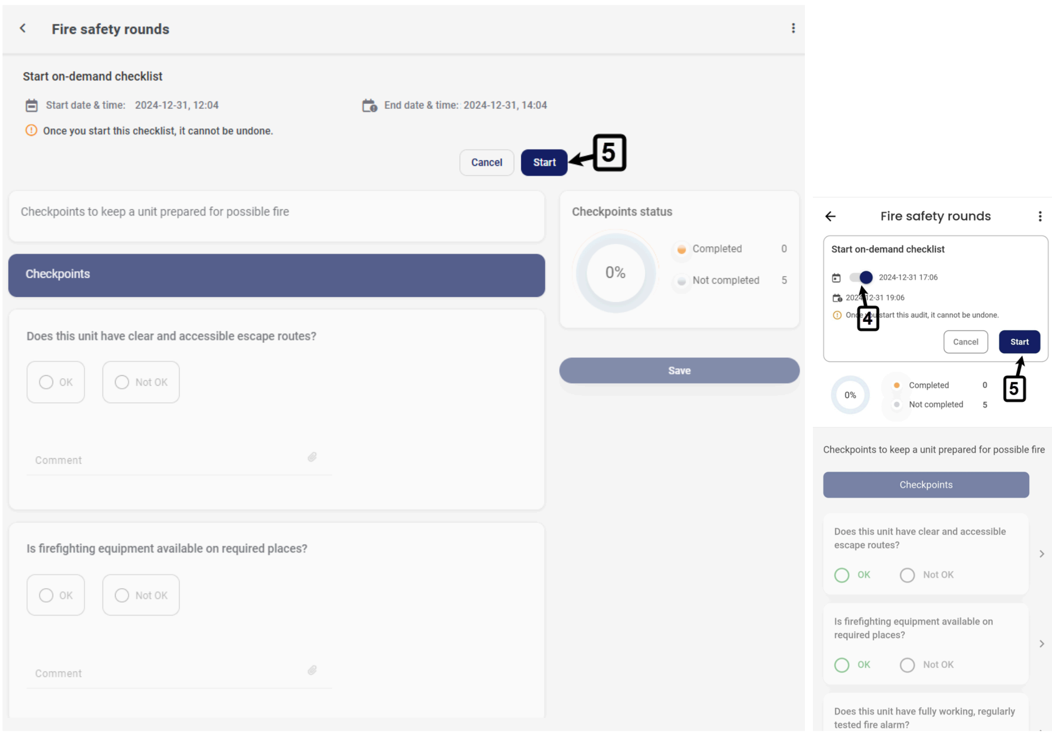


3. Click the **Start** button on this checklist completion page to see the Start and End time of the on-demand iteration you are going to start.



4. If you are using the mobile app to start this on-demand checklist, switch **ON** the **Start toggle** button to see the Start and End time.

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



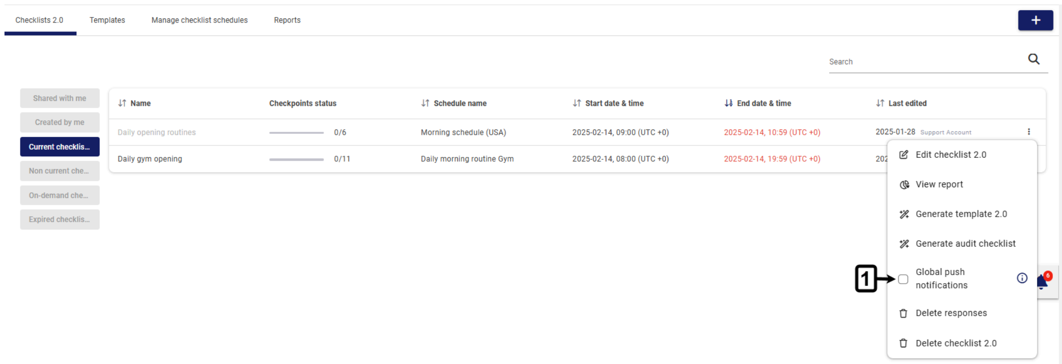
Once you start an on-demand checklist, it's also shown in the Current checklists filter. You and your selected colleagues from your unit can complete checkpoints on this checklist before End time of this ongoing iteration.

Manage Settings of a Scheduled checklist

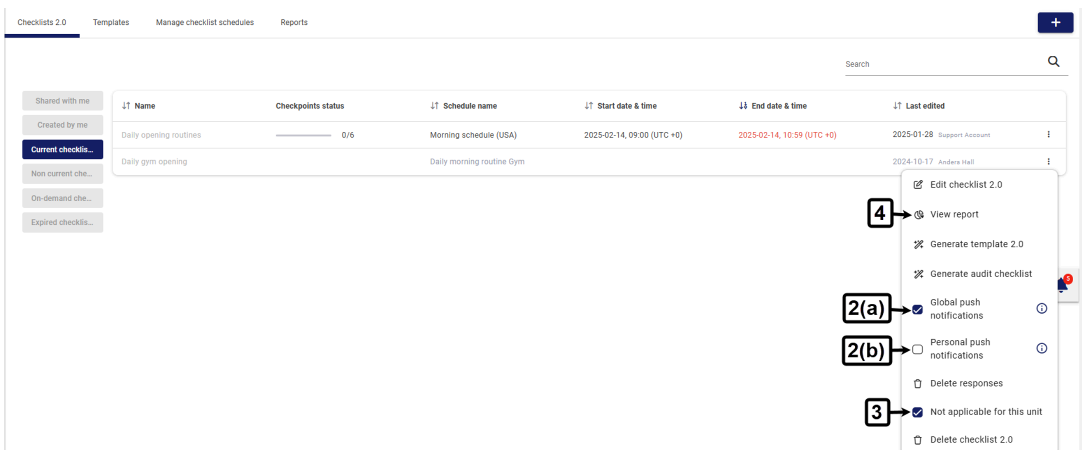
Manage Push notifications for a Checklist

Users who have editing access for the schedule connected with a checklist 2.0 can disable all push notifications for this checklist. See the user guide for **Checklist schedules**

1. When the **Global push notifications** option is **disabled** for a checklist, users who have access to complete this checklist for their unit don't receive checklist opened and reminder notification for any of its iteration..



2. When the **Global push notifications** option is **enabled** for a checklist, users who have access to complete this checklist for their unit can manage checklist opened and reminder notification for themselves by enabling or disabling the **Personal push notifications** option.



Mark a Checklist Not applicable for your Current unit

3. Users who have the **Share** right on at least the local level of Checklists 2.0 module can mark a recurring or one-time checklist schedule not applicable for their unit. See the user guide for **Roles administration**

Note: "**Not applicable for this unit**" option is not available for on-demand checklist schedules. If an on-demand checklist is not relevant to a unit. They can simply ignore this because it's never going to start on its own. See the user guide for **On-demand checklists**

Thorough, users with appropriate access level can mark checkpoints on an on-demand checklist not applicable for their unit on its completion page. Refer to item 13 in the user guide for **Checklist 2.0 completion for your unit**

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View checklist report

4. Users who have access to **Checklists 2.0 Reports dashboard** can go to the report page of a checklist schedule by clicking the **View report** option. See the User Guide for **Checklist 2.0 Reports**

Note: View report option is available for a checklist schedule only if an iteration is ongoing for this schedule or it has at least one previous completed iteration.

Furthermore, you will find the **View report** option for a checklist schedule created by your colleagues only if they have opted to **Allow other users to view the report for this schedule**. See the User guide for **Checklist schedules**