

# Chainformation Admin User Guide

## (Checklists 2.0 Reports dashboard)

Last Updated: April 22, 2025

Welcome to the **Chainformation** user guide. In this version of Checklists 2.0 manual, we will learn how to access checklists reports and manage relevant options.

Checklists 2.0 Reports dashboard has a simple, user-friendly interface that offers valuable insights and actionable intelligence to easily track the results of checklists within your organisation. Checklists reports module has four standard widgets as follows:

1. **Open checklists** widget shows status of checklists that are currently ongoing.
2. **Attention required** widget shows new and persistent issues (deviations) in open checklists.
3. **Checklist history** widget shows performance of different units in past checklist iterations.
4. **Recent activity** widget shows a live feed of recent user activity on the Checklists module.

You can also create custom widgets on your Reports dashboard to track progress on checklists from specific areas and individual locations.

This document only has user guides on how to view and manage data on different widgets in the Checklists 2.0 and Audit checklists Reports modules. Please see the [user guide for Checklists 2.0 Set-up](#) and [Audit Checklists](#) to learn how to create new checklists 2.0, audit checklists and schedule them for completion from different units and roles. Refer to the [user guide for Checklists 2.0 Completion](#) to get detailed instructions on how to complete a checklist 2.0 for your current unit and manage its relevant settings.

***NOTE to SUPER ADMIN:*** You must first make the proper settings for local, central and global levels of **Checklists 2.0** and **Audit Checklists Reports** functions in your **system setup** to control which **Roles** in your organisation are allowed to view checklists 2.0 and audit checklists reports. [See the User Guide for Roles Administration](#)

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

<b>Access Reports dashboard</b>	<b>3</b>
<b>Open checklists</b>	<b>5</b>
View selected open checklist report	6
<b>Attention required (Deviations)</b>	<b>8</b>
<b>Recent activity widget</b>	<b>11</b>
<b>Checklist history</b>	<b>12</b>

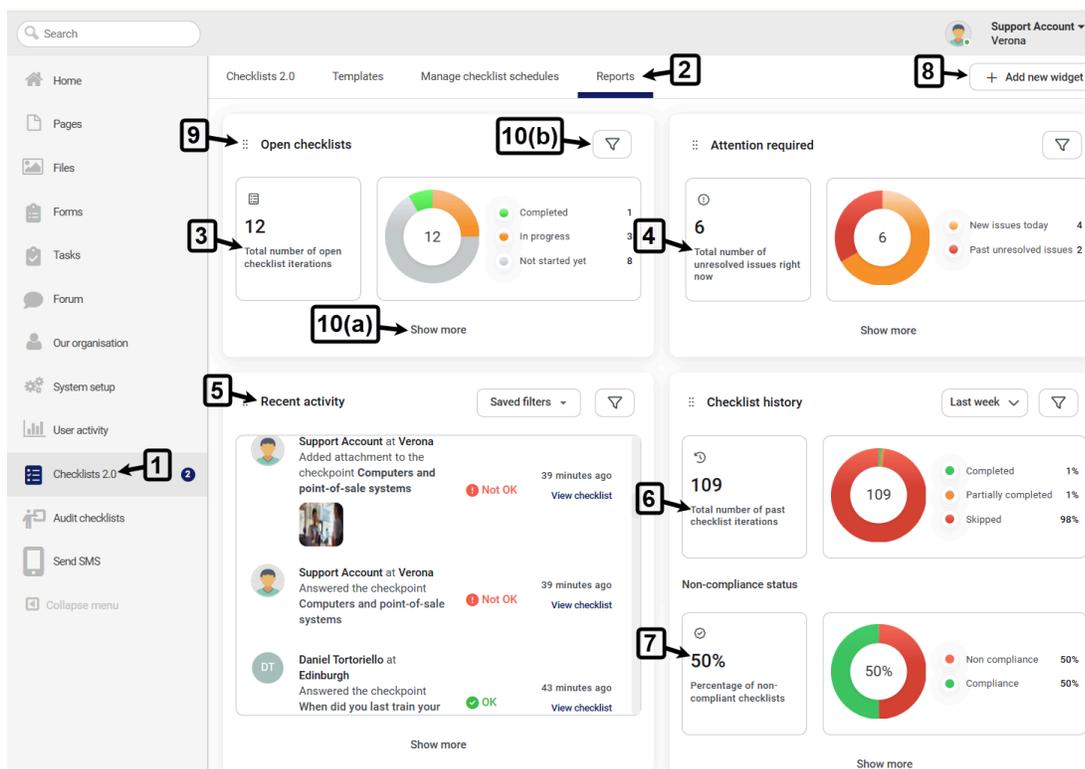
View selected checklist history report	13
View detailed checklist history report of a location	15
View line graph (performance metrics) report	17
Locations performance benchmark comparison	17
<b>Review checklist gallery</b>	<b>18</b>
<b>Custom dashboard widgets</b>	<b>19</b>

## Access Reports dashboard

Once you have logged in to the **Chainformation** platform, follow these navigation steps to go to your Checklists 2.0 Reports dashboard and review progress on open and past checklists from different locations in your organisation.

**Note:** You must have **Checklists 2.0 Reports** module enabled for your role on at least local level to access Reports dashboard. 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 module.
2. Go to **Reports** tab on this module to review checklist reports.



You can review data on different widgets as follows:

<https://chainformation.com/userguides>

3. **Open checklists widget** shows the total number of checklist iterations that are currently ongoing for different locations. Open checklist iterations are classified into three categories based on their completion status.

3(a): **“Completed”** status refers to the checklists on which all checkpoints are completed in the ongoing iteration by the respective locations.

3(b): **“In progress”** status refers to the checklists on which some checkpoints are completed in the ongoing iteration and some checkpoints are not answered yet.

3(c): **“Not started yet”** status refers to the checklists on which no checkpoint is answered yet in the ongoing iteration.

4. **Attention required widget** shows the total number of deviations reported in all ongoing checklist iterations. These deviations are divided into two categories:

4(a). **“New issues today”** refer to the checkpoints that are reported as Not OK in the current iteration but were OK in the previous iteration.

4(b). **“Past unresolved issues”** refer to the checkpoint deviations that have occurred at least twice in a row.

5. **Recent activity widget** shows a live feed of recent user activity on the Checklists module in the last 24 hours that might include:

(5a) A user answered or updated a checkpoint

(5b) A user added or removed attachment from a checkpoint

(5c) A user added a comment on a checkpoint

**Note:** Tracking user activity on audit checklists seems redundant because audits are usually conducted by the same specific users on all locations. So, Recent activity widget is not found on the Audit checklists Reports dashboard.

6. **Checklist history widget** shows the total number of past checklist iterations ended in the selected time period e.g. last week for different locations. Checklist history iterations are classified into three categories based on their completion status.

6(a): **“Completed”** status refers to the checklists on which all checkpoints were completed by the respective locations before the iteration ended.

6(b): **“Partially completed”** status refers to the checklists on which some checkpoints were completed before the iteration ended and some checkpoints were skipped or missed.

6(c): “**Skipped**” status refers to the checklists on which no checkpoint was answered before the iteration ended.

7. Checklist history widget also includes a pie chart for **non-compliance status**. This graph shows the percentage of non compliance referring to checklists that did not meet the set compliance threshold. See the user guide for **compliance threshold**

**Red** color on the non-compliance pie chart represents failed control limits while **green** refers to ones that met the control limit.

8. Four standard widgets on the reports dashboard show data from all available checklists, areas and business areas. You can create custom widgets on your Checklists 2.0 Reports dashboard to see data from specific checklists, locations, areas and business areas. See the user guide for **Custom Reports widgets**

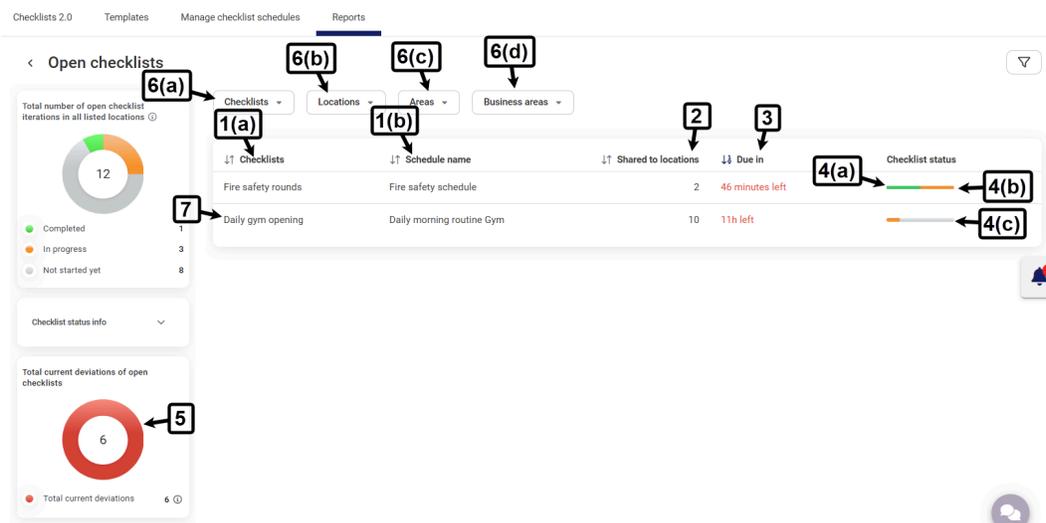
9. You can **drag** a reports widget from its original position to a new position on the dashboard.

Now, we will review details of data available on all Reports widgets.

10. You can click on the **Show more** button or **Filter icon** on a widget to access the relevant table.

## Open checklists

On Open checklists table, you can review data from ongoing checklist iterations as follows:



1. You can view names of all open checklists and their connected schedules under **Checklists** and **Schedule name** headers respectively.

2. You can view the number of locations for which a checklist iteration is ongoing under **Shared to locations** header.

**Note:** If a checklist schedule is shared with a location but this location has marked it not applicable, this location is not included in the number of open checklist iterations of this schedule until it's applicable again for this location.

3. You can see the time left when an ongoing checklist iteration closes in the **Due in** column.

4. You can see the completion status of an ongoing checklist iteration from different locations under the **Checklist status** header.

4(a). **Green** color represents locations that have completed all checkpoints in this iteration.

4(b). **Orange** color represents locations that have completed some checkpoints in this iteration i.e. checklist is in progress from these locations.

4(c). **Grey** color represents locations that have not answered any checkpoint in this iteration i.e. checklist is not started yet from these locations.

5. Open checklists table also includes a deviations counter that shows the number of deviations reported in all ongoing checklist iterations listed on the table.

You can click on this counter to view details of these deviations. [See the user guide for \*\*Attention required \(Deviations\)\*\* table](#)

6. You can filter data on the Open checklists table to view the status of ongoing iterations from different checklists, locations, areas and business areas. [See the user guide for \*\*Filter function on Reports dashboard\*\*](#)

7. You can click on a checklist row to view the detailed report of its ongoing iteration.

## **View selected open checklist report**

Open checklist report page of a checklist schedule has two tabs.

8. **Checklists** tab shows completion status of checkpoints and deviations reported on these checkpoints from each location.

**Note:** If a location has marked a **checkpoint not applicable**, this checkpoint is not considered for calculation of Checklist status from this location until it's applicable again for this location.

Back Daily gym opening ^

Checklist name: Daily gym opening Last edited: 2024-10-17 Anders Hall  
 Schedule name: Daily morning routine Gym Due in: 11h left  
 Created by: Anders Hall

Checklist schedules Locations Areas Business areas

Daily gym opening Daily morning routine Gym

Checklists Checkpoints

8(a) 8(b) 11

Locations	Checklist status	Deviation
Edinburgh	8/11	2
Manchester	0/11	None
Milano 9	7/10	1
New York	0/11	None
Newquay	0/11	None
Northampton	0/11	None
Salt Lake City	0/11	None
Titan	4/11	None
Verona	7/11	2

11 Total number of open checklist iterations in all listed locations: 10  
 Completed: 0, In progress: 4, Not started yet: 6

12 Total current deviations of open checklists: 5

9. You can click on a location name in the Checklists tab to view the detailed open checklist report of this location.

Milano - Daily gym opening, Daily morning routine Gym 9(a)

7/10

Period	Sections	Checkpoints	Answers	Comments	Attachments	Reported by
2025-04-08, 11:00 - 2025-04-08, 22:59	Reception	Computers and point-of-sale system Start up, log in Show more	OK			Daniel Tortoriello Today, 19:41
		Sanitation Clean and sanitize high-touch Show more				
		Turn on lights and check that fr...	Not OK			Daniel Tortoriello Today, 19:41
	Facilities	Check equipment Ensure all cardio and strength Show more	OK			Daniel Tortoriello Today, 18:04
		Clean equipment Check and clean equipment for Show more	OK			Daniel Tortoriello Today, 18:04
		Restock Restock paper towels, cleaning Show more	OK			Daniel Tortoriello Today, 18:17
		Walk through Walk through all areas of the gym Show more	OK			Daniel Tortoriello Today, 18:04

9(a). You can download an offline copy of the detailed open checklist report of the selected location.

10. **Checkpoints** tab on the selected open checklist report page shows the number of locations that have answered a checkpoint OK, Not OK or not answered it yet.

**Note:** If a location has marked a **checkpoint not applicable**, this location is excluded from checkpoint status columns until this checkpoint is applicable again for it.

The screenshot displays the Chainformation interface. At the top, there are filters for 'Checklist schedules', 'Locations', 'Areas', and 'Business areas'. Below these, there are tabs for 'Daily morning opening' and 'Daily morning routine Gym'. A callout box '14' points to the 'Checklist schedules' filter. The main content area is divided into 'Checklists' and 'Checkpoints'. A callout box '10' points to the 'Checkpoints' tab. Below this is a table with columns for 'Checkpoints', 'Locations answered...', 'Locations answered...', and 'Locations Not Ans...'. The table lists various checkpoints such as 'Computers and point...', 'Restock', 'Maintenance check', etc., with corresponding counts in green, red, and grey circles. To the right, there is a 'Total current deviations of open checklists' widget showing a red donut chart with the number '5'. Below this is a 'Gallery' widget showing three attachments from locations 'Milano', 'Titan', and 'Verona'. A callout box '13' points to the 'Gallery' widget.

11. You can view the summary of locations that have completed, in progress and not started yet the ongoing iteration of the selected checklist schedule on its detailed report page.

12. You can view the summary of deviations from different locations in this iteration of the selected checklist schedule.

13. You can review attachments added on different checkpoints from all locations in this iteration on the Gallery widget. See the user guide for **Checklist gallery**

14. If a checklist is connected with two or more schedules, you can switch to see the open checklist report of different schedules from the Checklist schedules filter on this checklist report page.

## Attention required (Deviations)

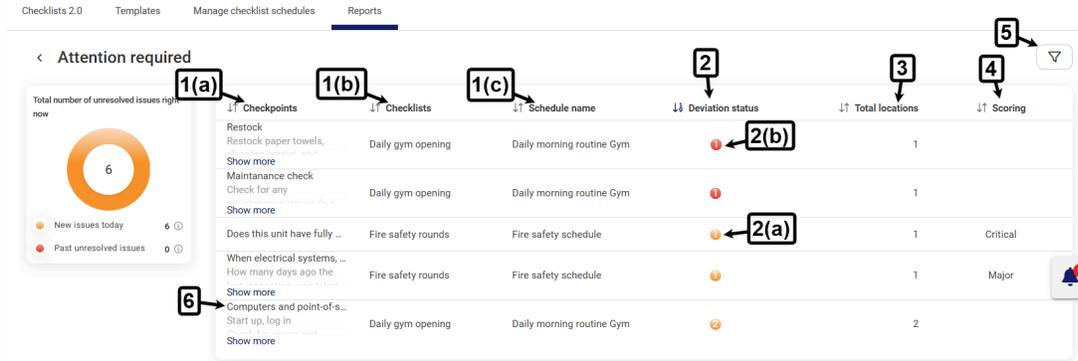
On Attention required (deviations) table, you can review details of deviations reported in ongoing iterations of different checklist schedules as follows:

1. You can view names of deviation checkpoints, checklist associated with this checkpoint and its connected schedule under **Checkpoints**, **Checklists** and **Schedule name** headers respectively.

2. You can see the frequency status of a deviation in the **Deviation status** column.

2(a). **Orange** color represents the number of locations that have reported a checkpoint as Not OK in the current iteration but have answered OK in the previous iteration.

2(b). **Red** color represents the number of locations that have reported a checkpoint as Not OK at least twice in a row.



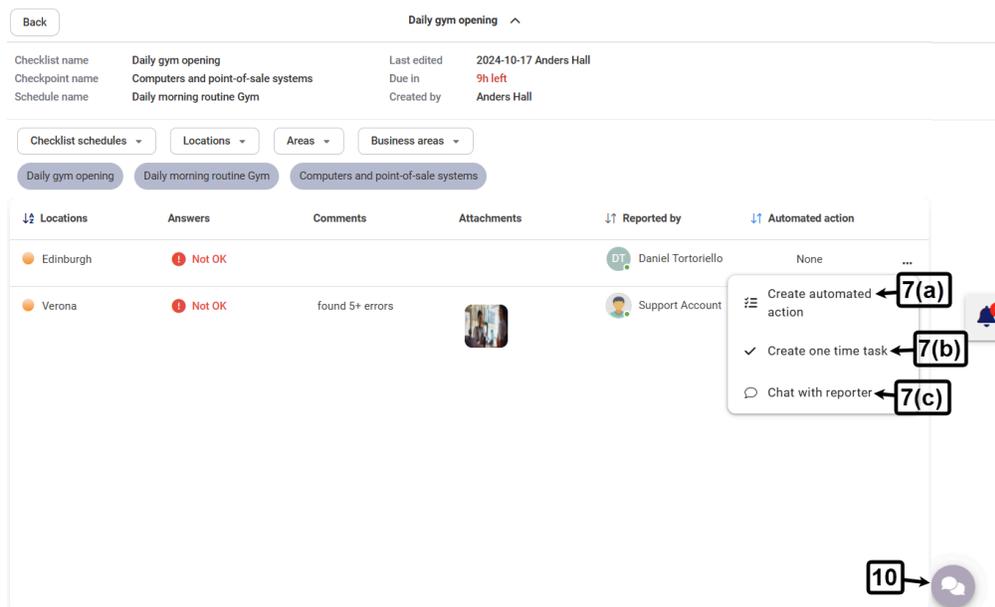
Checkpoints	Checklists	Schedule name	Deviation status	Total locations	Scoring
Restock Restock paper towels, ... Show more	Daily gym opening	Daily morning routine Gym	❗ 2(b)	1	
Maintenance check Check for any ... Show more	Daily gym opening	Daily morning routine Gym	❗ 2(b)	1	
Does this unit have fully ... Show more	Fire safety rounds	Fire safety schedule	⚠️ 2(a)	1	Critical
When electrical systems, ... How many days ago the ... Show more	Fire safety rounds	Fire safety schedule	⚠️	1	Major
Computers and point-of-s... Start up, log in ... Show more	Daily gym opening	Daily morning routine Gym	⚠️	2	

3. “**Total locations**” column shows the total number of locations that have reported a checkpoint as Not OK in the ongoing checklist iteration.

4. You can also see the **Scoring** category (if any) of a deviation checkpoint on the Attention required table. See the user guides for **compliance threshold** and **checkpoints scoring**

5. You can filter data on the Attention required table to view the deviations from different checklists, locations, areas and business areas. See the user guide for **Filter function on Reports dashboard**

6. You can click on a deviation row to view its details e.g. names of all locations that have reported this deviation, comments, attachments (if any) added on deviation checkpoint and name of the colleague who has reported this deviation.



Locations	Answers	Comments	Attachments	Reported by	Automated action
Edinburgh	❗ Not OK			DT Daniel Tortoriello	None
Verona	❗ Not OK	found 5+ errors		Support Account	<ul style="list-style-type: none"> <li>☰ Create automated action ← 7(a)</li> <li>✓ Create one time task ← 7(b)</li> <li>💬 Chat with reporter ← 7(c)</li> </ul>

10 → 

7. You can take different actions as follows to find out the reason for a deviation and prevent this deviation from happening again.

7(a). Create automated action

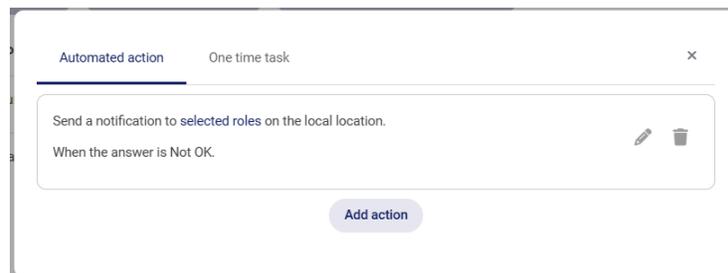
7(b). Create one-time task

7(c). Chat with reporter

8. Clicking on the **Create automated action** button will open the Automated action tab where you can create an automated task or send notification action for this deviation checkpoint. See the user guide for **automated checkpoint actions**

9. You can also **create a one-time task** for your selected colleagues. See the user guide for **Tasks manager**

**Note:** If an automated action or one-time task is already created for a deviation checkpoint, you can review it on Automated action and One-time task tab respectively.

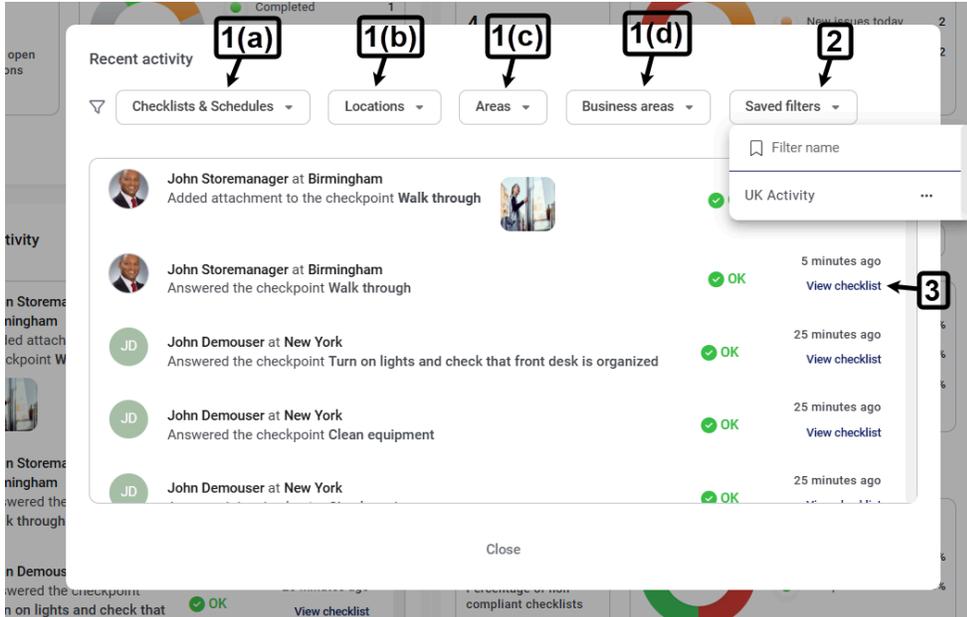


10. Clicking on the Chat with reporter button will open the Chat window with the colleague who reported this deviation where you can send them an inquiry message. See the user guide for **Chat** module

---

## Recent activity widget

**Remember**, the Recent activity widget displays user actions on open running checklists from the last 24 hours. If a checklist iteration has ended, user actions from this checklist are not displayed on the Recent activity widget even if these actions were reported in the last 24 hours.

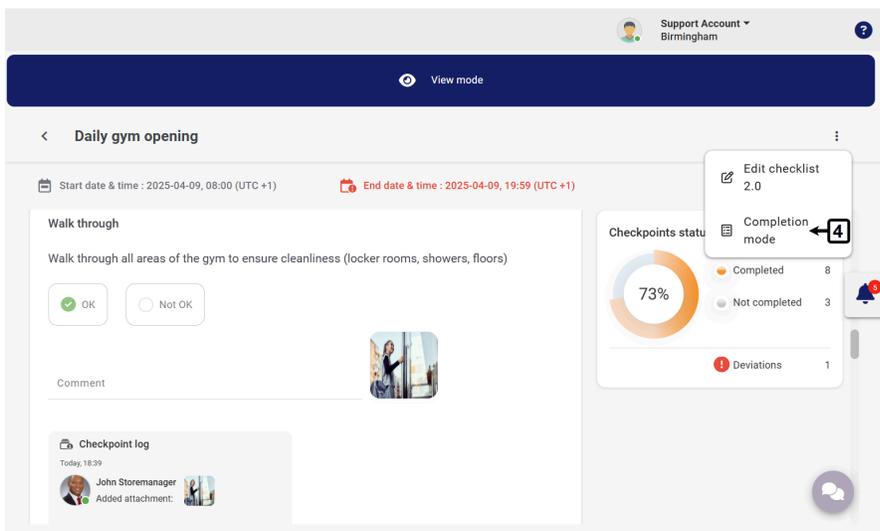


By default, the Recent activity widget shows user activity on all available checklists from all areas and business areas.

1. You can filter data on the Recent activity widget (**Show more state**) to see user activity on specific checklists and schedules from different locations, areas and business areas. See the user guide for **Filter function on Reports dashboard**

2. If you have saved some filter choices on the Recent activity widget, these **saved filters** are also accessible on the dashboard. See the user guide for **Saved filter**

3. You can open a checklist in **“View mode”** from the Recent activity widget to review its Start, End date, time, checkpoints status and answer submitted by the specific location on each checkpoint.



**Remember**, you can't make changes on any checkpoint when a checklist is opened in "View mode."

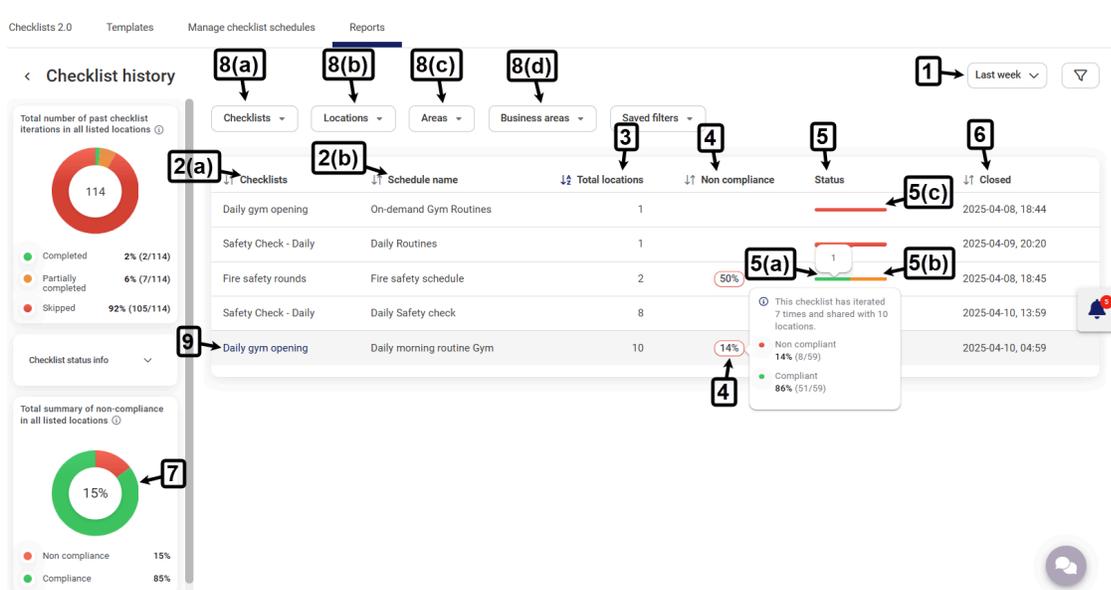
4. Though, you can switch to "**Completion mode**" if you are viewing the checklist progress from your current location and you are allowed to complete this specific checklist schedule. See the user guide for **Checklist 2.0 Completion**

## Checklist history

On Checklist history table, you can review data from past checklist iterations as follows:

1. By default, the Checklist history table shows data for checklist iterations completed in the **last week**.

You can also choose to see data for checklist iterations completed **Today, Last month, Last quarter, Last year** or a **custom range**.



2. You can view names of checklists and their connected schedules that have at least one completed iteration in the selected time period under **Checklists** and **Schedule name** headers respectively.

3. You can view the number of locations that have completed at least one iteration of each listed schedule under the **Total locations** header.

**Note:** If a checklist schedule is shared with a location but this location has no applicable iteration of this schedule in the selected time period, this location is not included in the number of total locations for this schedule on Checklist history table.

4. You can see the percentage of non-compliance on a specific schedule from all listed locations in the selected time period if compliance threshold is enabled for its connected checklist. See the user guide for **compliance threshold**

5. You can review the summary of completion status of checklist iterations by the listed locations in the selected time period under the **Status** header.

5(a). **Green** color represents iterations in which all checkpoints were completed by a location.

5(b). **Orange** color represents iterations in which some checkpoints were completed before the iteration ended and some checkpoints were skipped or missed

5(c). **Red** color represents iterations in which no checkpoint was answered by a location before the iteration ended.

6. You can see the date and time when the latest iteration of a checklist schedule in the selected time period has ended in the **Closed** column.

7. Checklist history widget also includes a pie chart for **non-compliance status** that shows the percentage of non compliance in all listed locations.

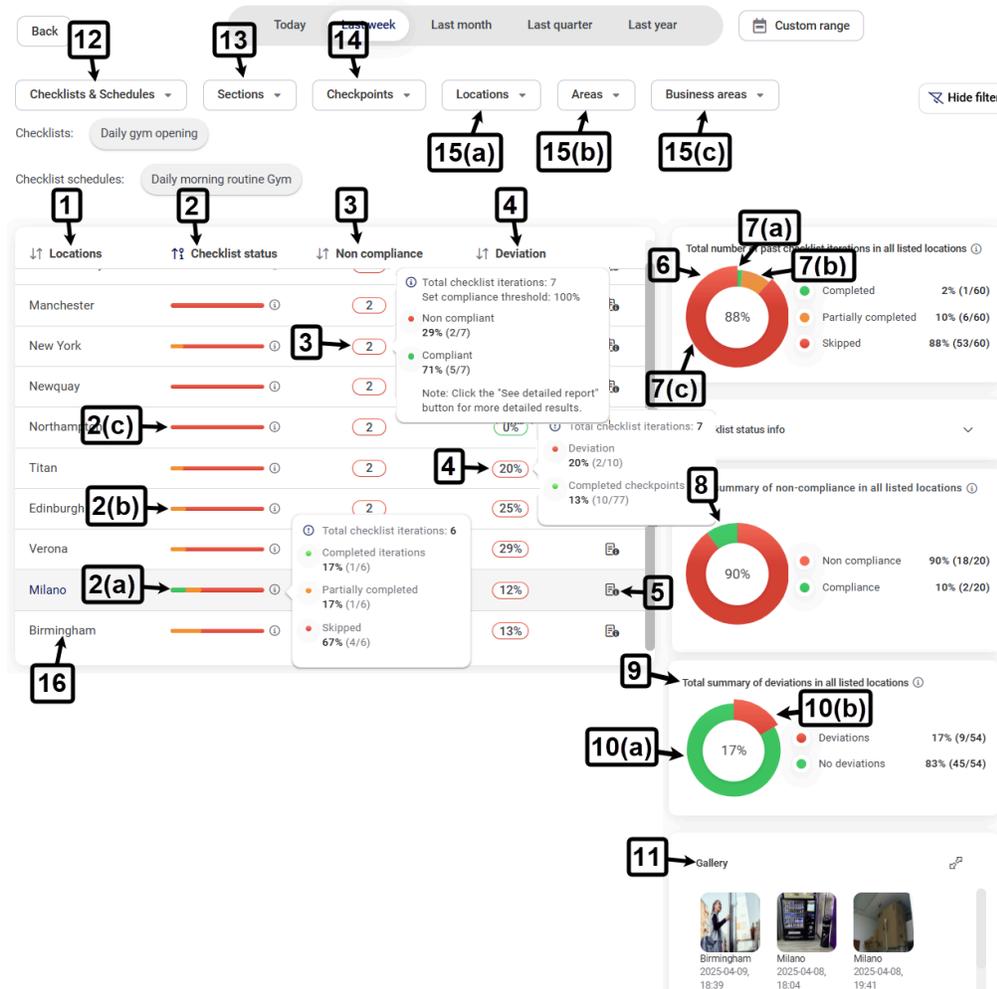
**Red** color on the non-compliance pie chart represents failed control limits while **green** refers to ones that met the control limit.

8. You can filter data on the Checklist history table to view the data of past iterations from different checklists, locations, areas and business areas. See the user guide for **Filter function on Reports dashboard**

9. You can click on a checklist row to view the detailed report of its previous iterations in the selected time period.

## **View selected checklist history report**

You can review data on checklist history report of a checklist schedule as follows:



- Locations** column shows all locations that have at least one previous iteration of the selected schedule in the selected time period.
- Checklist status** column shows checklist completion status of all iterations by a location in the selected time period.
  - Green** color represents iterations in which all checkpoints were completed by this location.
  - Orange** color represents iterations in which some checkpoints were completed before the iteration ended and some checkpoints were skipped or missed
  - Red** color represents iterations in which no checkpoint was answered by this location before the iteration ended.
- “Non compliance”** column shows the number of iterations in which a location was flagged as non-compliant due to its score falling below the established threshold.

4. **Deviation** column shows the percentage of Not OK checkpoints in reference to all checkpoints answered by a location in the listed iterations.
5. You can click on the **history icon** at the end of a location row on the selected checklist history report page to see the detailed report of this location in each listed iteration from the selected time period. See the user guide for **Detailed checklist history report of a location**
- Remember**, the detailed report of a location shows data from previous iterations of only one schedule. So, if you are viewing the report of two or more schedules from the same or different checklists, the option to view the detailed report of a location will be hidden. Refer to item 10 in this user guide to learn how to **view checklist history report of multiple schedules**
6. You can view the summary of iterations in which a checklist was completed, partially completed or skipped by listed locations on the selected checklist history report page.
7. You can click on a relevant pie chart color from item 6 to sort locations in the table on the basis of **Completed, Partially completed or Skipped Checklist status**.
- 7(a). Clicking on the **Green** part allows you to sort locations based on highest to lowest or lowest to highest number of **completed iterations**.
- 7(b). Clicking on the **Orange** part allows you to sort locations based on highest to lowest or lowest to highest number of **partially completed iterations**.
- 7(c). Clicking on the **Red** part allows you to sort locations based on highest to lowest or lowest to highest number of **skipped iterations**.
8. You can view the **percentage of non-compliance** from different locations in all listed iterations as a pie chart on the selected checklist history report page.  
**Red** color on the non-compliance pie chart represents failed control limits while **green** refers to ones that met the control limit.
9. You can view the **percentage of deviations** from different locations in all listed iterations as a pie chart on the selected checklist history report page.  
**Red** color on the deviations pie chart represents checkpoints reported as Not OK while **green** refers to ones that were reported as OK.
10. You can click on a relevant pie chart color from item 9 to see data for only those checkpoints that were reported as either **OK** or **Not OK**.
11. You can review attachments added on different checkpoints from different locations in all listed iterations on the Gallery widget. See the user guide for **Checklist gallery**

12. You can select two or more schedules connected with the same or different checklists from the **Checklists & Schedules** filter to view cumulative data from all iterations of these schedules in the selected time period on the selected checklist history report.

13. You can select one or more sections of a checklist from the **Sections** filter to see data for only these sections from all iterations of the selected schedules in the selected time period.

14. You can select one or more checkpoints of a checklist from the **Checkpoints** filter to see data for only these checkpoints from all iterations of the selected schedules in the selected time period.

**Remember**, you can select sections or checkpoints from the same checklist only. So, Sections and Checkpoints filters will be disabled for selection when you have selected schedules from the two or more checklists in the **Checklists & Schedules** filter.

Also, you can't add sections and checkpoints together in the filter. So, the **Checkpoints** filter is disabled for selection when you have added at least one section in the filter and vice versa.

15. You can filter data on the selected checklist history report page to view the data of past iterations of selected schedules from different locations, areas and business areas. See the user guide for **Filter function on Reports dashboard**

16. You can click a location name on the selected checklist history page to access **line graph** and **location performance benchmark** reports.

## **View detailed checklist history report of a location**

Once you have opened checklist history report of a location as demonstrated in the previous section (item 5 in the user guide for **selected checklist history report**), you can review data on this report as follows:

1. Detailed report header shows the name of location, checklist and its connected schedule for which you are viewing this report.

2. Period column shows the Start and End date, time of the iteration for which you are viewing the data on the page.

3. You can switch to see data from other iterations in the selected time period from the header row of the detailed report.

1 Checklist detailed report for Milano for Daily gym opening, Daily morning routine Gym

2 Period 2025-04-09, 08:00 - 2025-04-09, 19:59

3 First 2 of 6 Last

4 Sections

5 Checkpoints

6 Scoring

7 Answers

8(a) Comments

8(b) Attachments

9 Reported by

Period	Sections	Checkpoints	Scoring	Answers	Comments	Attachments	Reported by
2025-04-09, 08:00 - 2025-04-09, 19:59	Reception	Computers and point- Start up, log in <a href="#">Show more</a>	Major	OK			DT Daniel Tortoriello 2025-04-09, 18:18
		Sanitation Clean and sanitize <a href="#">Show more</a>	Major	OK	7(a)		DT Daniel Tortoriello 2025-04-09, 18:18
		Turn on lights and ...	Major	OK			DT Daniel Tortoriello 2025-04-09, 18:18
Section result:				100%	10		Compliance threshold: 100%
	Facilities	Check equipment Ensure all cardio <a href="#">Show more</a>		OK			DT Daniel Tortoriello 2025-04-09, 18:18
		Clean equipment Check and clean <a href="#">Show more</a>	Major	OK			DT Daniel Tortoriello 2025-04-09, 18:18
		Restock Restock paper <a href="#">Show more</a>	Minor	Not OK	30 pcs limited stock		DT Daniel Tortoriello 2025-04-09, 18:18
		Walk through Walk through all <a href="#">Show more</a>	Major	OK			DT Daniel Tortoriello 2025-04-09, 18:18
Section result:				87%			Compliance threshold: 100%
	Locker Rooms	Inspect locker rooms Inspect lockers, <a href="#">Show more</a>		OK			DT Daniel Tortoriello 2025-04-09, 18:18
		Maintenance check Check for any <a href="#">Show more</a>	Major	OK			DT Daniel Tortoriello 2025-04-09, 18:18
		Restock Ensure soap, paper <a href="#">Show more</a>	Minor	OK			DT Daniel Tortoriello 2025-04-09, 18:18
Section result:				100%			Compliance threshold: 100%
Final checklist result:				95%	11		Compliance threshold: 100%

4. **Sections** column shows the name of each section in the selected checklist.

**Note:** If you have added one or more sections in the filter (item 10 in the user guide for **selected checklist history report**), the detailed report of a location shows data from only selected sections in each iteration.

5. **Checkpoints** column shows the name of each checkpoint in the selected checklist.

**Remember,** if a location has marked a **checkpoint not applicable**, you will not find this checkpoint in the detailed report of this location from the previous iterations where it was not applicable for the selected location. Though, you may find this checkpoint in the detailed report of this location from the previous iterations where it was still applicable for the selected location.

**Note:** If you have added one or more checkpoints in the filter (item 11 in the user guide for **selected checklist history report**), the detailed report of a location shows data from only selected checkpoints in each iteration.

6. **Scoring** column shows the scoring category (if any) of each checkpoint listed in the report.

7. **Answers** column shows the OK or Not OK status of a checkpoint in each iteration where this checkpoint was answered. If this is a measurement checkpoint, you can also view its reported value in the Answers column.

8. You can review **comments** and **attachments** (if any) added on a checkpoint in their respective columns on the detailed report of a location.

9. **Reported by** column shows the name of the user who answered a checkpoint and the date, time when this answer was submitted.

10. **Section result** row at the end of each section in the detailed report of a location shows the total compliance score of all checkpoints from this section in the selected iteration.

**Note:** If you are viewing the report of individual checkpoints (item 5 in this user guide), Section result data is not shown because all checkpoints from a section might not be selected.

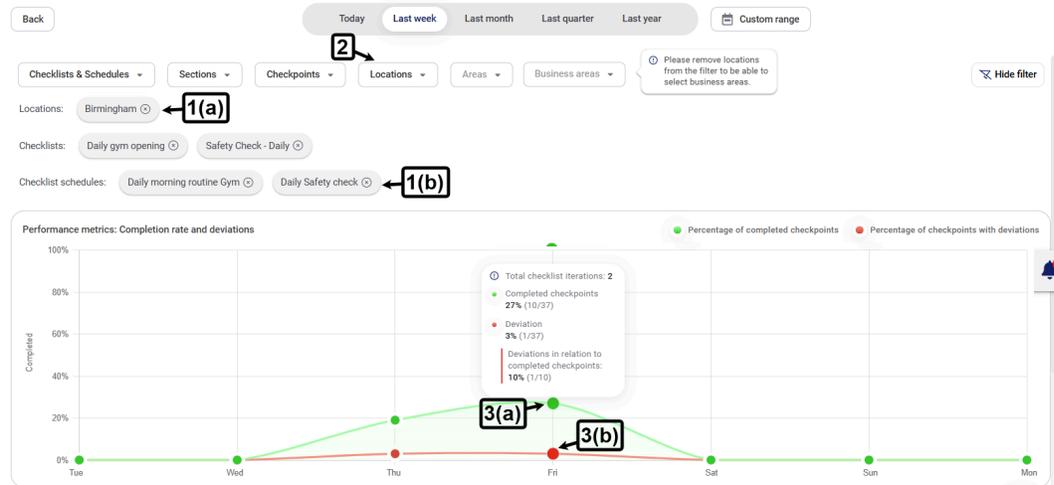
11. **Final checklist result** row at the end of the detailed report of a location shows the total compliance score of all checkpoints from all sections of this checklist in the selected iteration.

**Note:** If you are viewing the report of individual sections (item 4 in this user guide), Final checklist result data is not shown until all sections of this checklist are selected in the filter.

**Remember**, a **red** border around the section/checklist compliance score indicates this score fell below the set compliance threshold while a **green** border around this value indicates the score met the compliance threshold. See the user guide for **Compliance threshold and Checkpoints scoring**

## **View line graph (performance metrics) report**

1. When you click a location name on the selected checklist history report page (item 11 in the user guide for **selected checklist history report**), this opens the line graph (performance metrics) report of this location in the selected time period for all the checklist schedules selected in the filter.



2. You can remove this location from the filter to see data from all available locations or add more locations to see data from the selected locations.

3. **Performance metrics graph** shows the percentage of completed checkpoints and deviation checkpoints by the selected locations on each day of the selected time period e.g. last week.

**Green** dot on the graph refers to the percentage of completed checkpoints in selected checklist iterations and **red** dot refers to the percentage of deviations i.e. Not OK checkpoints.

4. You can hover your cursor over a dot to review the data from which this percentage value is calculated.

## Locations performance benchmark comparison

1. When you scroll down the Line graph report page, the **location performance benchmark comparison** section shows up.

This section shows no data until you select some valid preferences for display from the **Location performance benchmark filter**.



2. Select at least one schedule from the **Checklists & Schedules** filter.

**Remember**, you can select up to 4 schedules for comparison from the location performance benchmark filter.

Also, only those checklists and their connected schedules are available for selection in the location performance benchmark filter that you have already added in the checklist history main filter. (Refer to item 12 in the user guide for **selected checklist history report**)

3. Select the **locations** whose performance for the selected checklist schedules you want to compare.

**Remember**, you can select up to 20 locations for comparison from the location performance benchmark filter.

4. Now, you can review the performance of all selected locations in the selected time period for each selected schedule in a bar graph.

5. **Height of a location bar** refers to the percentage of checkpoints answered by this location.

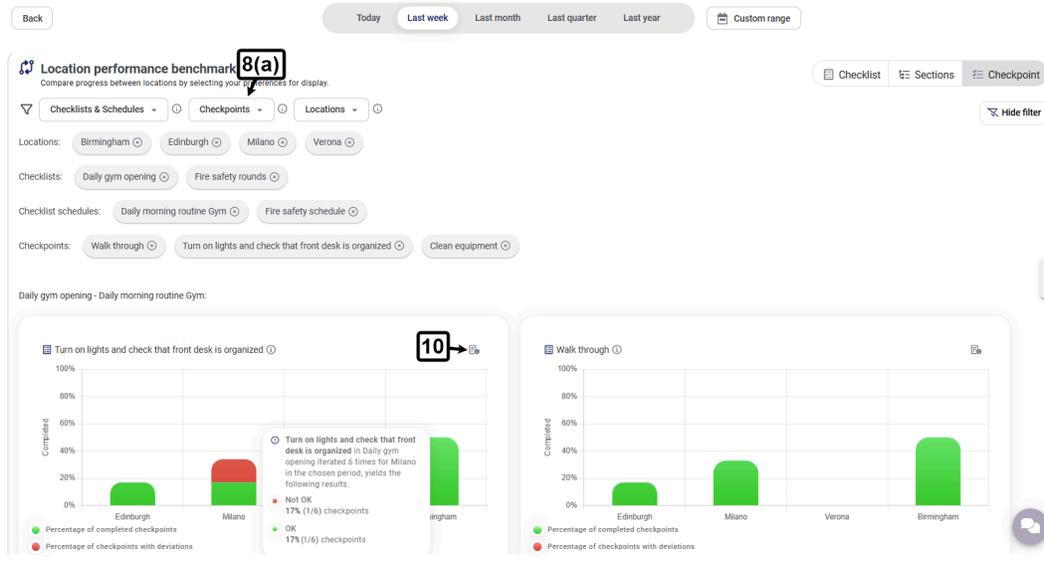
5(a). **Green** part of the bar refers to the checkpoints that were answered OK.

5(b). **Red** part of the bar refers to the checkpoints that were answered Not OK.

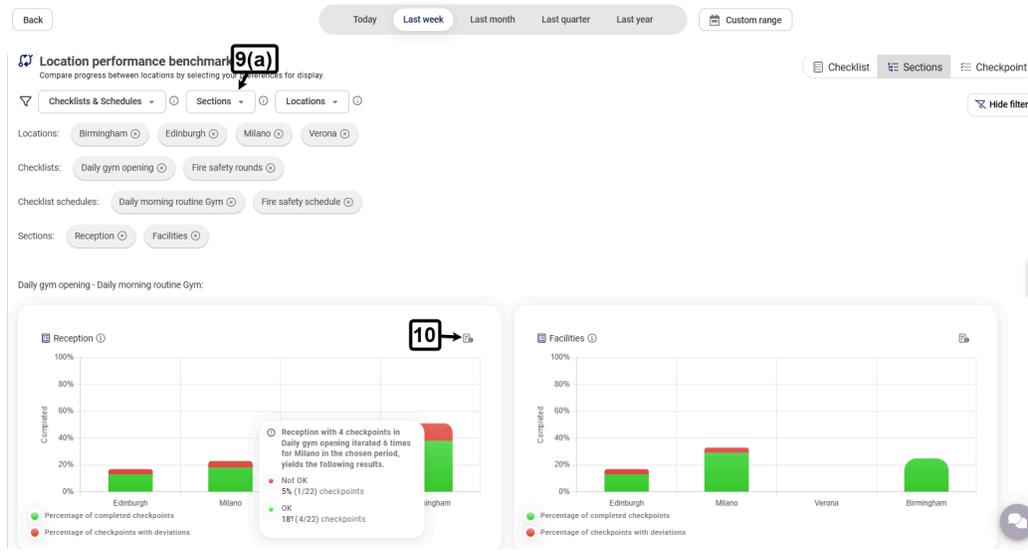
6. You can hover your cursor over a bar in the graph to review the data from which this percentage value is calculated.

7. You can also compare performance of each location for specific checkpoints and sections.

8. Go to the **Checkpoints** tab on the location performance benchmark page and select the required checkpoints for comparison from the filter.



9. Go to the **Sections** tab on the location performance benchmark page and select the required checkpoints for sections from the filter.

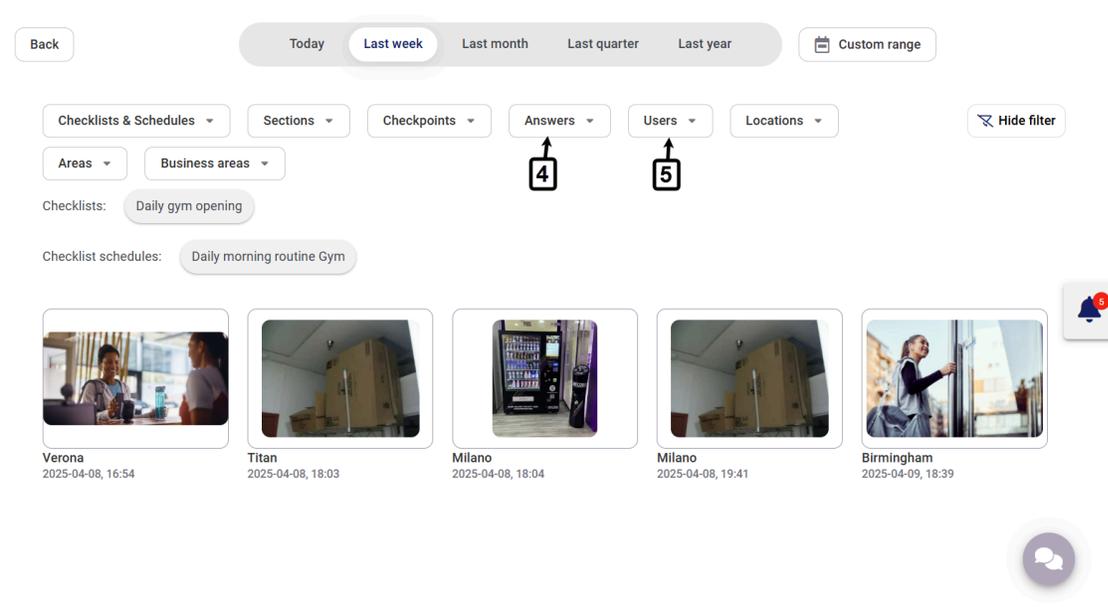


**Remember**, you can select up to 4 checkpoints or sections for comparison from the location performance benchmark filter.

10. You can click on the **history icon** in the top right corner of the location performance graph to see the detailed checklist, section or checkpoint report of a location in each listed iteration from the selected time period. See the user guide for **Detailed checklist history report of a location**

## Review checklist gallery

1. When you click the **Expand** icon in the **Gallery widget** on the selected open checklist or checklist history report page, this redirects you to the Checklist gallery page.



2. **Gallery page for an open checklist** shows attachments added on different checkpoints from different locations in the ongoing iteration of the selected schedule.

3. **Gallery page for the checklist history** shows attachments added on different checkpoints from different locations in all listed iterations of the selected checklist schedules from the selected time period.

In addition to normal filter options e.g. Checklists & Schedules, Sections, Checkpoints, etc., you can also filter attachments on the Gallery page based on:

4. checkpoint **answers** i.e. **OK** or **Not OK**
5. **Users** who have added these attachments