

Chainformation Admin User Guide

(Checklists 2.0 Reports dashboard)

Last Updated: March 01, 2026

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.

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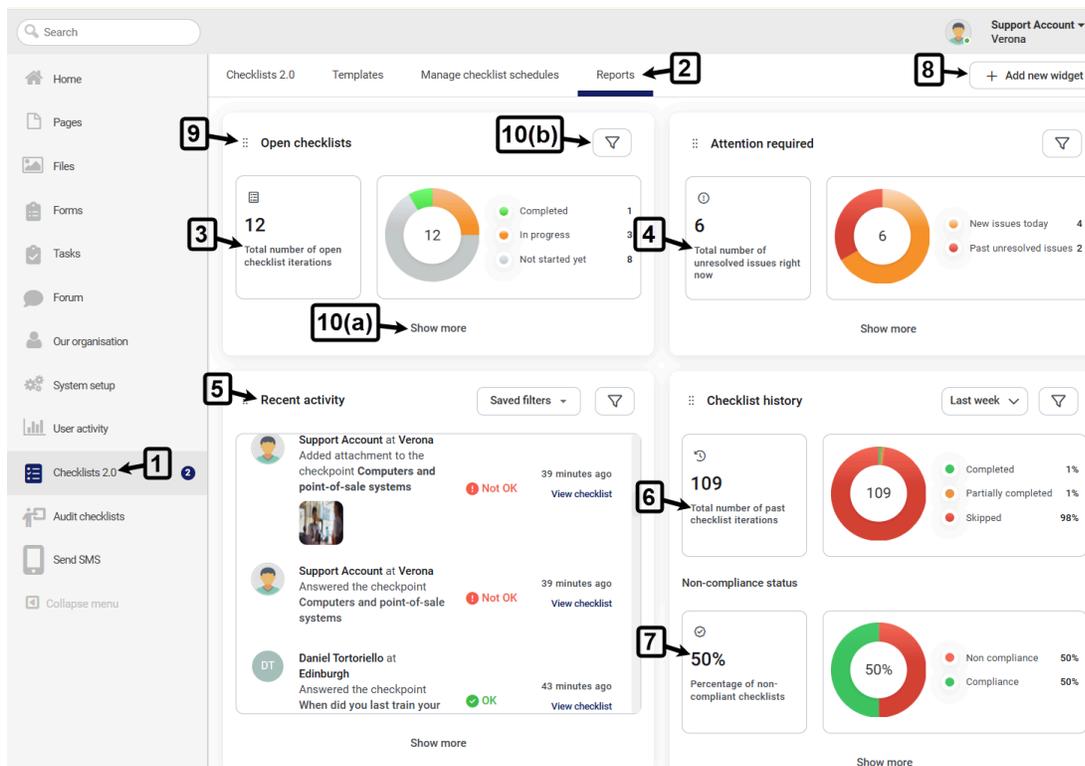
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Access Reports dashboard

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:

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**

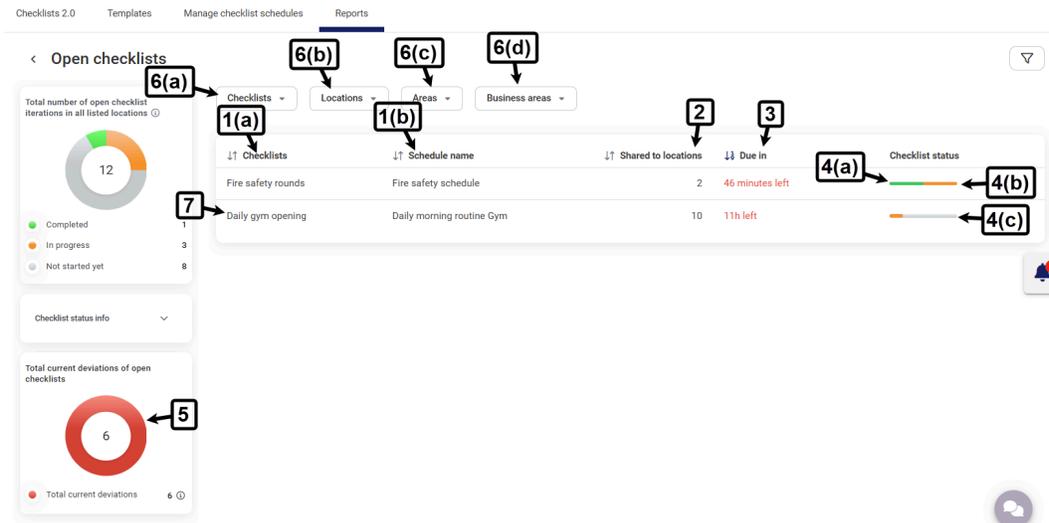
9. You can **drag** a reports widget from its original position to a new position on the dashboard.

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

Locations	Checklist status	Deviation
Edinburgh	8/11	2
Manchester	0/11	None
Milano	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

8(a) 8(b) 11

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

9

Checklist status info

Total current deviations of open checklists: 5
 12

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 7/10

9(a)

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 cards 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 two tabs: 'Daily morning opening' (highlighted with a '14' callout) and 'Daily morning routine Gym'. The main content area is divided into two sections. The left section, 'Checkpoints', is highlighted with a '10' callout and contains a table with columns for 'Checkpoints', 'Locations answered...', 'Locations answered...', and 'Locations Not Ans...'. The right section, 'Total current deviations of open checklists', is highlighted with a '13' callout and features a donut chart showing a value of 5, with a 'Gallery' widget below it displaying three images from locations: Milano, Titan, and Verona.

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.

Checklists 2.0 Templates Manage checklist schedules **Reports**

< Attention required 5

1(a) 1(b) 1(c) 2 3 4

1(a)	1(b)	1(c)	2	3	4
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		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.

Back Daily gym opening ^

Checklist name: Daily gym opening Last edited: 2024-10-17 Anders Hall
 Checkpoint name: Computers and point-of-sale systems Due in: 9h left
 Schedule name: Daily morning routine Gym Created by: Anders Hall

Checklist schedules Locations Areas Business areas

Daily gym opening Daily morning routine Gym Computers and point-of-sale systems

Locations	Answers	Comments	Attachments	Reported by	Automated action
Edinburgh	Not OK			Daniel Tortoriello	None
Verona	Not OK	found 5+ errors		Support Account	7(a) Create automated action 7(b) Create one time task 7(c) Chat with reporter

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**

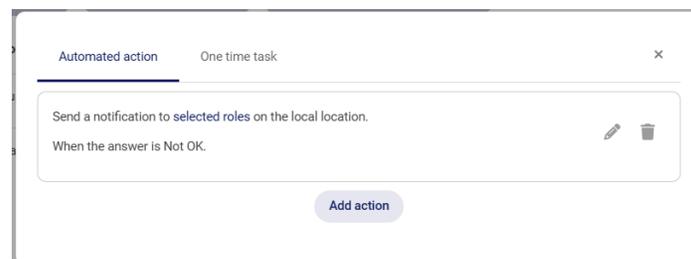
9. You can **create a one-time task** for this deviation checkpoint and assign it directly to the selected staff members or staff members from the selected roles and locations.

Available locations and users for assignment of one-time tasks are fetched based on your access level in the Tasks module. See the user guide for **Tasks manager**

Remember, you can create a new automated action for a deviation checkpoint or edit an existing one only if you have access to edit the relevant checklist. See the user guide for **Checklists Management**

You don't need editing access for the relevant checklist to create a one-time task for a deviation checkpoint. All users who have access to the Tasks module can create one-time tasks for deviations.

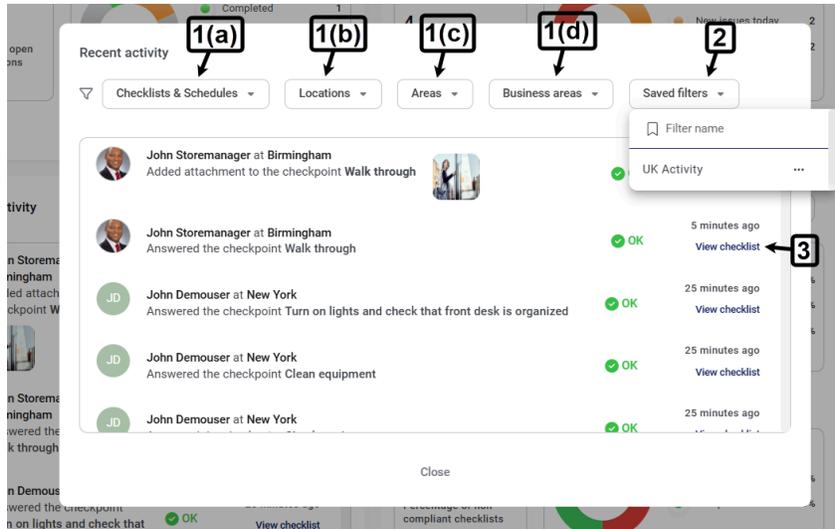
Note: If an automated action or one-time task is already created for a deviation checkpoint, you can review it on Automated action and One-time task tabs respectively.



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.

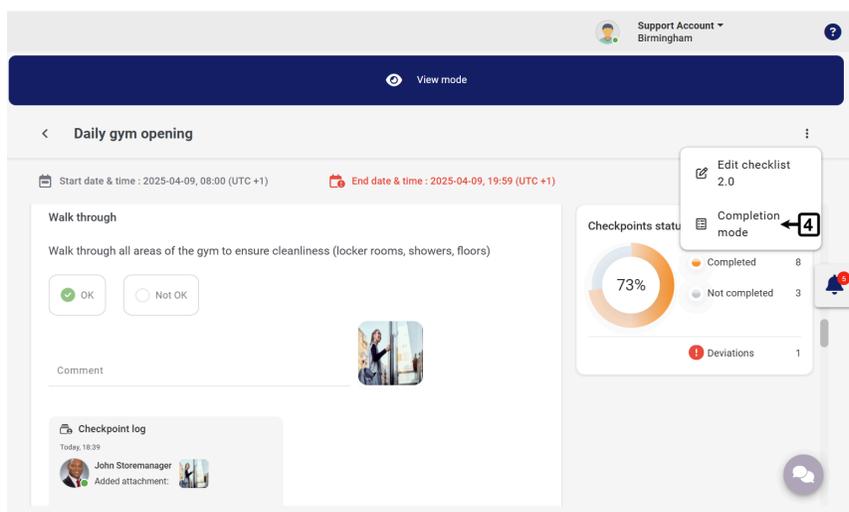


By default, the Recent activity widget shows user activity on all available checklists from all areas and business areas.

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”**.

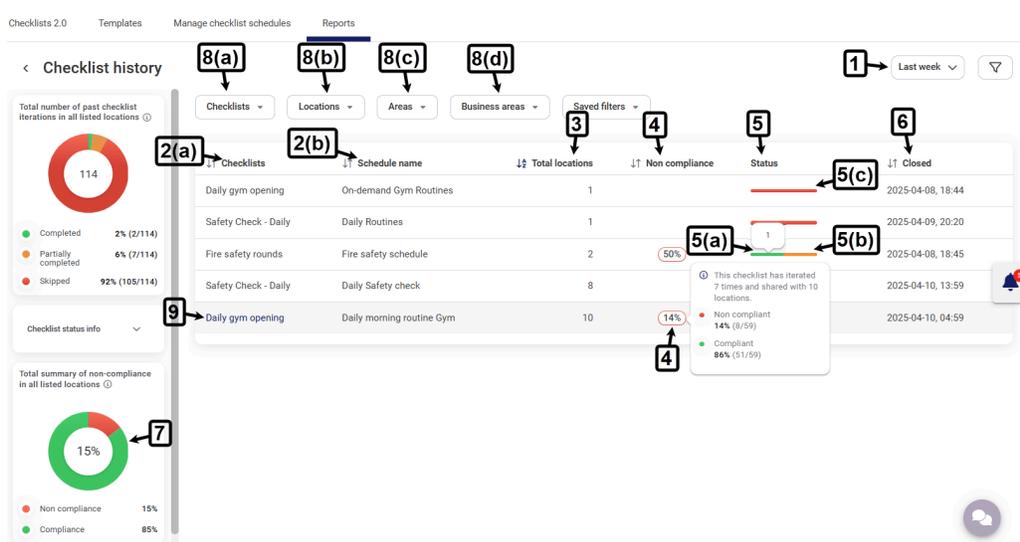
4. Though, you can switch to “**Completion mode**” if you are viewing the checklist progress from your current location and you are allowed to complete this specific checklist schedule. See the user guide for **Checklist 2.0 Completion**

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:

1. **Locations** column shows all locations that have at least one previous iteration of the selected schedule in the selected time period.

2. **Checklist status** column shows checklist completion status of all iterations by a location in the selected time period.

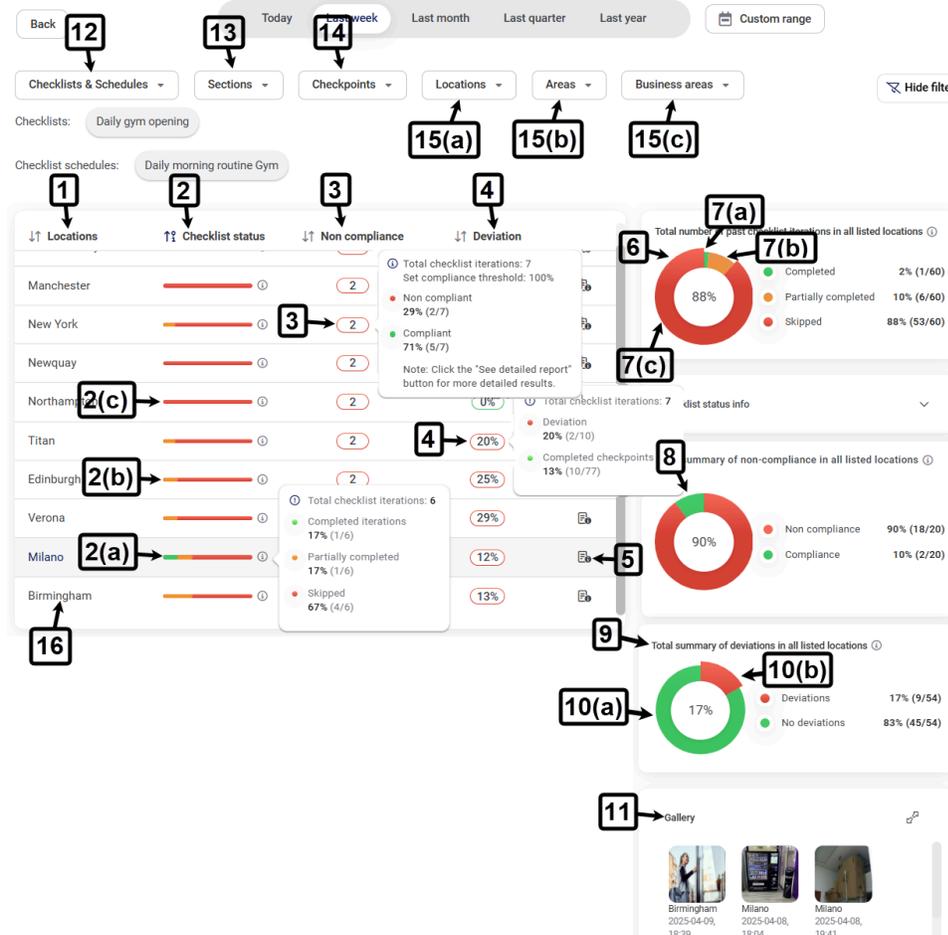
2(a). **Green** color represents iterations in which all checkpoints were completed by this location.

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

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

3. **“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.

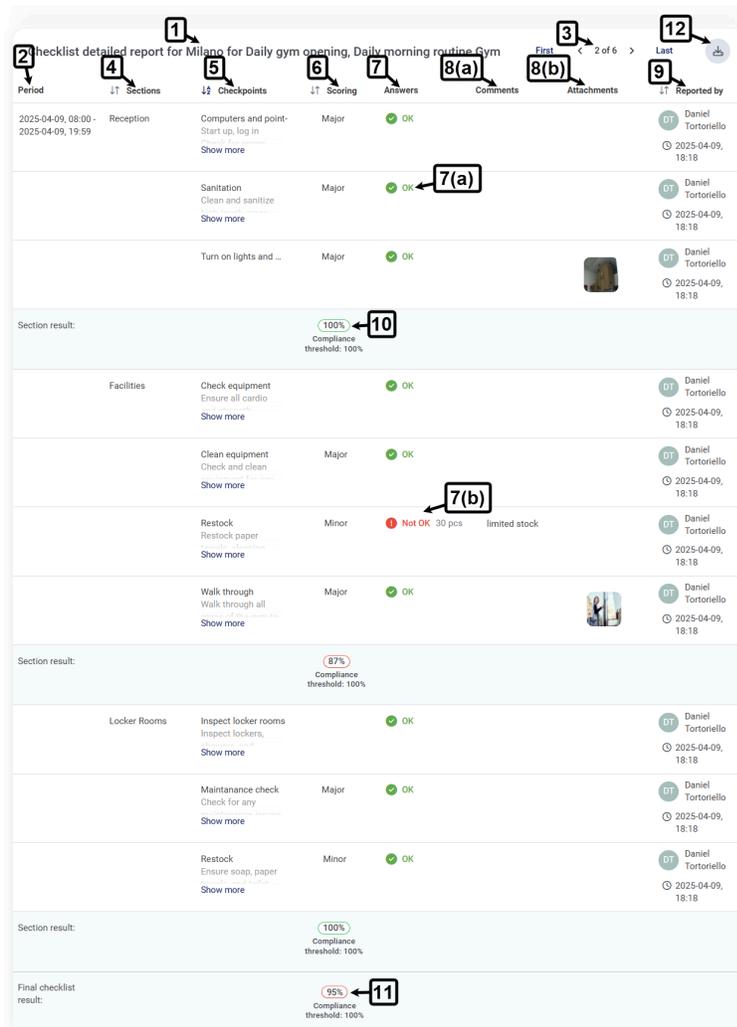
15. You can filter data on the selected checklist history report page to view the data of past iterations of selected schedules from different locations, areas and business areas. See the user guide for **Filter function on Reports dashboard**

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.



2	4	5	6	7	8(a)	8(b)	9	12
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 Show more	Major	OK			Daniel Tortoriello 2025-04-09, 18:18	
		Sanitation Clean and sanitize Show more	Major	OK	7(a)		Daniel Tortoriello 2025-04-09, 18:18	
		Turn on lights and ... Show more	Major	OK			Daniel Tortoriello 2025-04-09, 18:18	
Section result:		100% Compliance threshold: 100%		10				
	Facilities	Check equipment Ensure all cardio Show more	Major	OK			Daniel Tortoriello 2025-04-09, 18:18	
		Clean equipment Check and clean Show more	Major	OK			Daniel Tortoriello 2025-04-09, 18:18	
		Restock Restock paper Show more	Minor	Not OK: 30 pcs limited stock	7(b)		Daniel Tortoriello 2025-04-09, 18:18	
		Walk through Walk through all Show more	Major	OK			Daniel Tortoriello 2025-04-09, 18:18	
Section result:		87% Compliance threshold: 100%						
	Locker Rooms	Inspect locker rooms Inspect lockers, Show more	Major	OK			Daniel Tortoriello 2025-04-09, 18:18	
		Maintenance check Check for any Show more	Major	OK			Daniel Tortoriello 2025-04-09, 18:18	
		Restock Ensure soap, paper Show more	Minor	OK			Daniel Tortoriello 2025-04-09, 18:18	
Section result:		100% Compliance threshold: 100%						
Final checklist result:		95% Compliance threshold: 100%		11				

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.

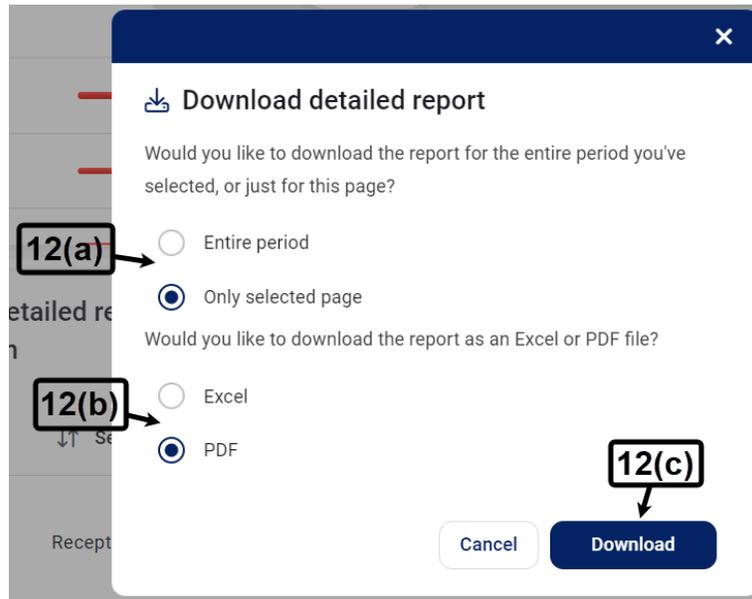
11. **Final checklist result** row at the end of the detailed report of a location shows the total compliance score of all checkpoints from all sections of this checklist in the selected iteration.

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**

12. You can get an offline copy of the detailed checklist history report of the selected location by clicking the “**download**” button.

This will open the “**Download detailed report**” overlay for selecting the time period and format of the download.



12(a). You can choose to download the report from only the selected page or all pages from the selected time period.

12(b). You can download the report as an Excel or PDF file.

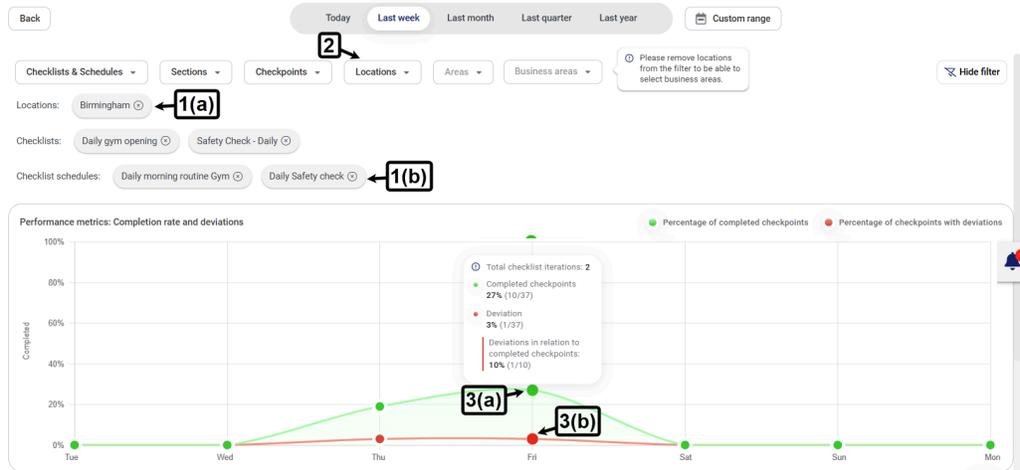
12(c). Click the “**Download**” button to get the file with your selected pages from time 12a and format from item 12b.

Note: If you are viewing the report of individual checkpoints or sections (items 4, 5 in this user guide), the downloaded report includes data from only selected checkpoints or sections.

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.

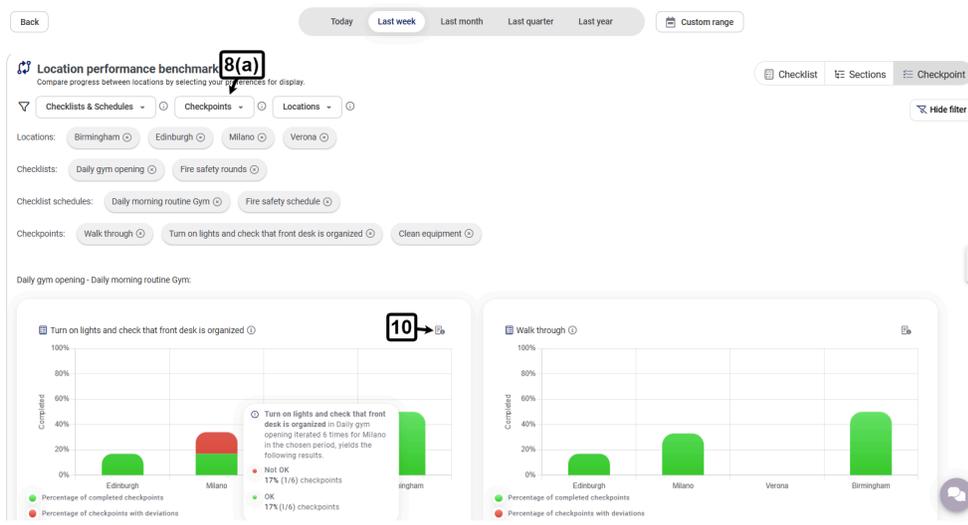
5(a). **Green** part of the bar refers to the checkpoints that were answered OK.

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

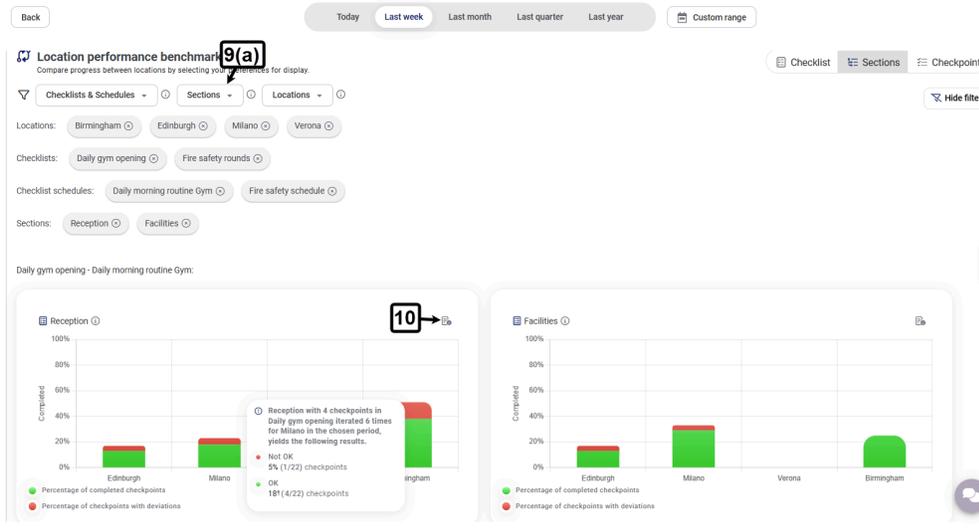
6. You can hover your cursor over a bar in the graph to review the data from which this percentage value is calculated.

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.

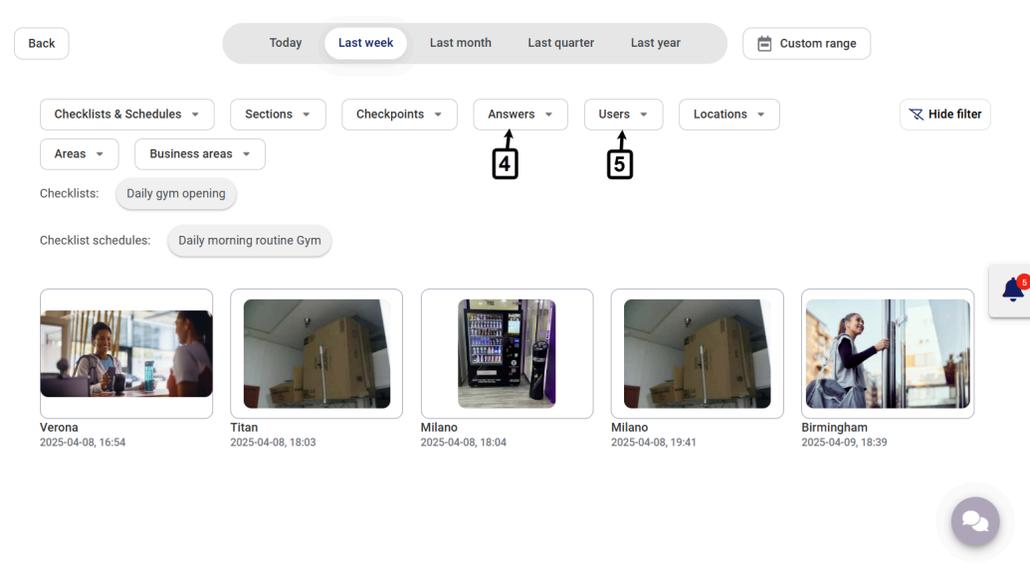


Remember, you can select up to 4 checkpoints or sections for comparison from the location performance benchmark filter.

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

Filter function on Reports dashboard

Every widget on the Checklists 2.0 Reports dashboard and its subpages have a dynamic filter that allows you to narrow down the data shown on a page to specific checklists, areas, locations, etc. You can also save your choices as a quick filter or custom widget.

Follow the navigation steps demonstrated below to filter data on a page by selecting the relevant options from the available filter menus.

The screenshot displays the 'Checklist history' page. On the left, a donut chart shows the status of 541 past checklist iterations: 0% (2/541) Completed, 1% (3/541) Partially completed, and 99% (536/541) Skipped. The main content area has filter menus for 'Checklists', 'Locations', 'Areas', and 'Business areas'. Below these is a table with columns: 'Checklists', 'Schedule name', 'Total locations', 'Non-compliance', 'Status', and 'Closed'. A context menu is open over the table, with callouts 9(a) pointing to 'Edit', 9(b) to 'Rename', and 9(c) to 'Delete'. Other callouts include 7 pointing to the 'Saved filters' menu, 8 to the 'Update filter' button, and 10 to the 'Save filter as a new widget' button.

1(a). When you select an option from the **Checklists** filter on the **Open checklists** table, this will list all the schedules connected with the selected checklist that have an ongoing iteration for at least one location.

1(b). When you select an option from the **Checklists** filter on the **Attention required** table, this will list deviations (if any) in ongoing iterations of all schedules connected with the selected checklist.

1(c). When you select an option from the **Checklists & Schedules** filter on the **Recent activity** widget, this will show all user activity entries (if any) in ongoing iteration of the selected checklist schedule.

1(d). When you select an option from the **Checklists** filter on the **Checklist history** table, this will list all the schedules connected with this checklist that have at least one completed iteration in the selected time period.

2(a). When you select an option from the **Locations** filter on a page, this will show checklist data (if any) from the selected location.

2(b). When you select an option from the **Areas** filter on a page, this will show checklist data (if any) from all locations in the selected area.

2(c). When you select an option from the **Business areas** filter on a page, this will show checklist data (if any) from all locations associated with the selected business area.

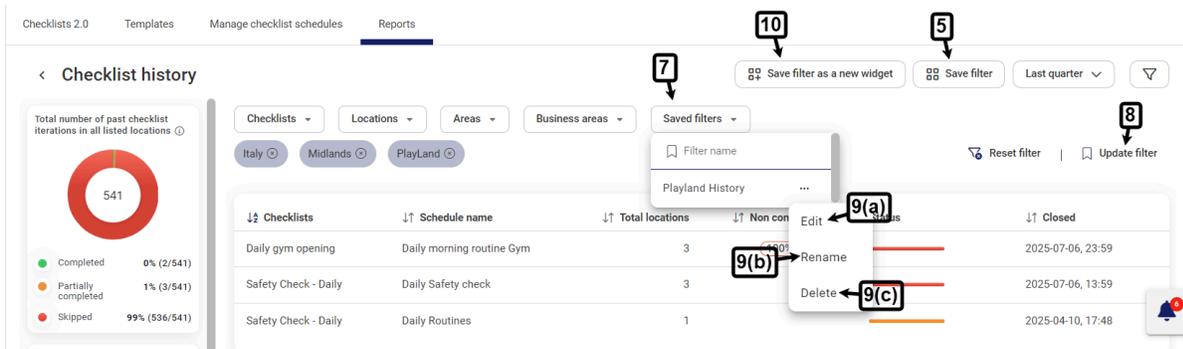
Note: When you have added at least one location in the applied filter, Areas and Business areas filters are disabled for selection to avoid selection of areas and business areas irrelevant to the selected location.

3. You can click the **Filter** icon or **Hide filter** button on a page to hide the options added in the applied filter. This will keep the applied filter effective & in the background and help you use more space on the page to review the available data without scrolling.

4. You can click the **Reset filter** button to remove all options from the applied filter and return the available data on a page to its default state.

Saved filters

When you have added one or more options in the applied filter on a widget, you can save the selected options as a quick filter on the selected page.

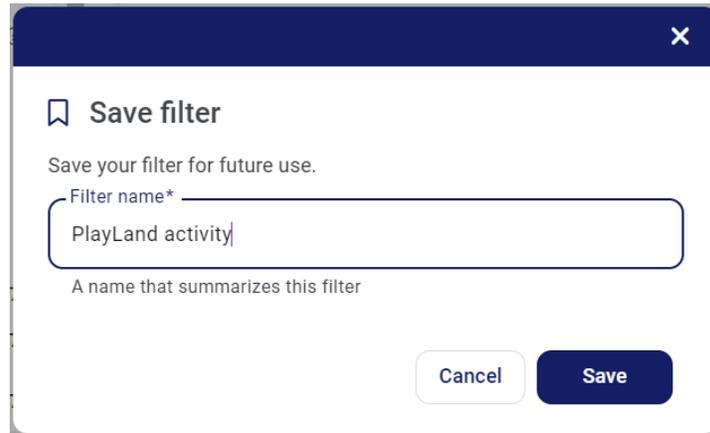


The screenshot shows the 'Checklist history' page. On the left, a donut chart displays 'Total number of past checklist iterations in all listed locations' with 541 total iterations: 0% (2/541) Completed, 1% (3/541) Partially completed, and 99% (536/541) Skipped. The main table lists checklists with columns for Checklist name, Schedule name, Total locations, Non-completed status, and Closed date. Annotations are as follows: 5 points to the 'Save filter' button; 7 points to the 'Saved filters' dropdown menu; 8 points to the 'Update filter' button; 9(a) points to the 'Edit' option in the context menu; 9(b) points to the 'Rename' option; and 9(c) points to the 'Delete' option.

Checklists	Schedule name	Total locations	Non con	Edit	Closed
Daily gym opening	Daily morning routine Gym	3			2025-07-06, 23:59
Safety Check - Daily	Daily Safety check	3			2025-07-06, 13:59
Safety Check - Daily	Daily Routines	1			2025-04-10, 17:48

5. Click the **Save filter** button on a table to save the selected options as a quick filter on this page.

6. Enter an appropriate name for this filter and click the **Save** button.



7. Now, you can apply this filter quickly on the page from your list of **Saved filters**.

8. When you have applied a saved filter on a page and add or remove some options from this filter, you can click the **Update filter** button to save the updated filter.

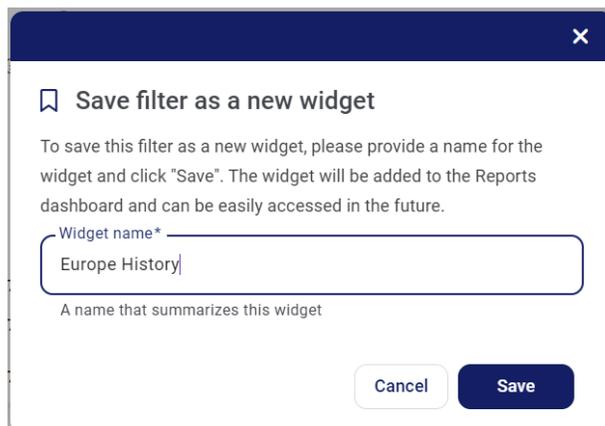
9. You can also **edit** options added in a saved filter, **rename** or **delete** it by clicking the relevant option for it from the Saved filters list.

When you have added one or more options in the applied filter on **Open checklists**, **Attention required** or **Checklist history** widget, you can save the selected options as a custom widget on your Reports dashboard. [See the user guide for Custom dashboard widgets](#)

10. Click the **Save filter as a new widget** button on a table to save the selected filter as a custom widget on your Reports dashboard.

Note: You can't create a custom Recent activity widget on your Reports dashboard. So, **Save filter as a new widget** button is not found on this widget.

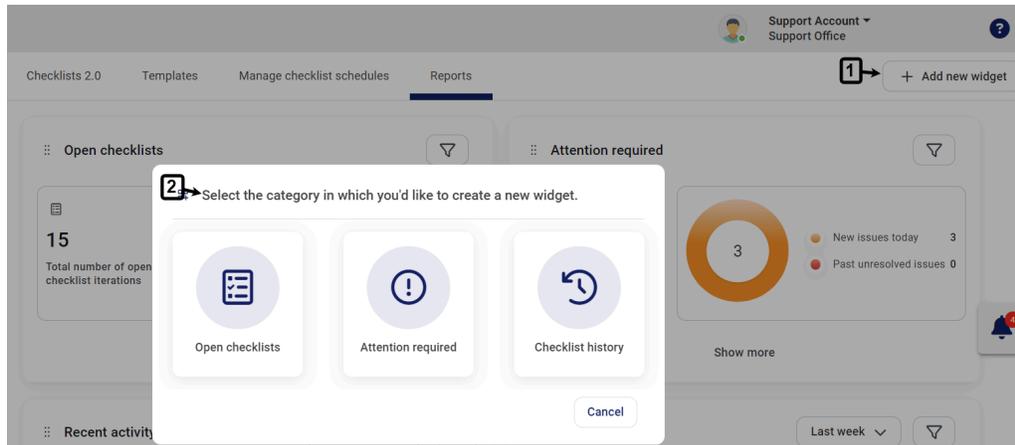
11. Enter an appropriate name for this widget and click the **Save** button.



Now, the widget with the selected filter options will be added on your Reports dashboard.

Custom dashboard widgets

Follow the navigation steps demonstrated below to add a **custom open checklists, attention required** or **checklist history widget** on the **Reports dashboard**.

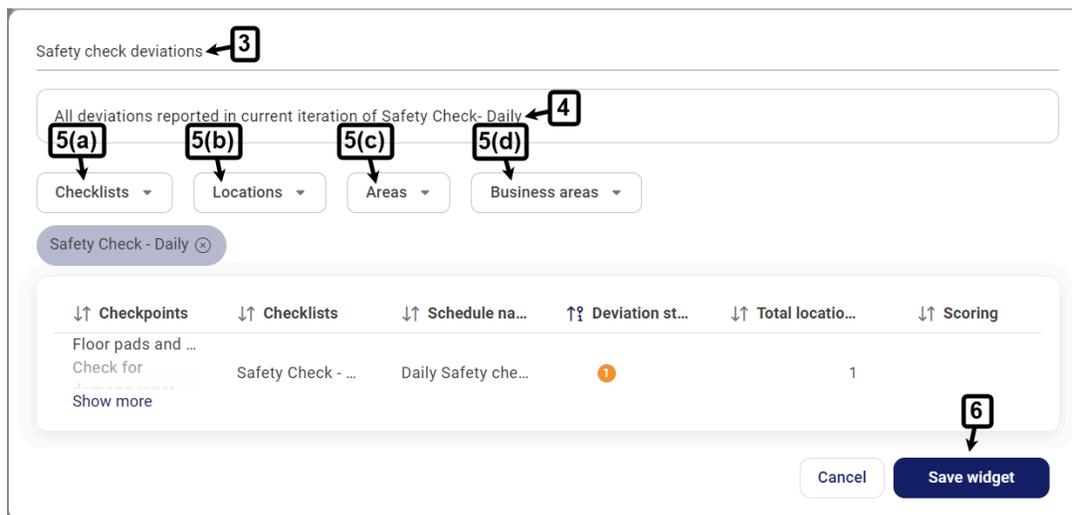


1. Click the **+ Add new widget** button on the Reports dashboard.

This will open the category selection dialog for the new widget.

2. Click the category in which you want to create the new widget.

This will open the **Create new widget** dialog for the selected category.



3. Enter a **widget name**. This should be explanatory, short and concise.

4. Enter a brief presentation (If needed) of the new widget in the **Summary** field.

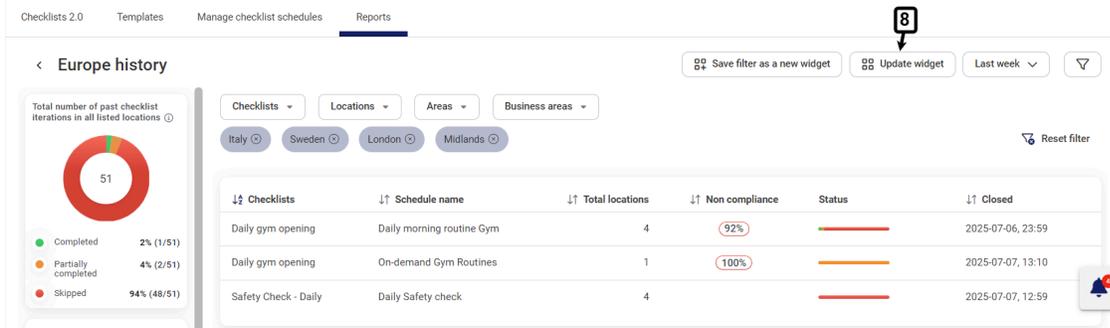
Remember, summary of a custom widget in item 4 replaces tooltip info on the custom widget. If you don't add a custom description, standard description from the selected widget type is shown on the new widget.

5. Select at least one filter option to show data on the custom widget. See the user guide for **Filter function**

6. Once you have entered an appropriate name and selected relevant filter options, click the **Save widget** button to show this widget on your Reports dashboard.

7. You can also save a custom widget from the applied filter on the relevant default widget. Refer to items 6, 7 in the user guide for **Saved filters**

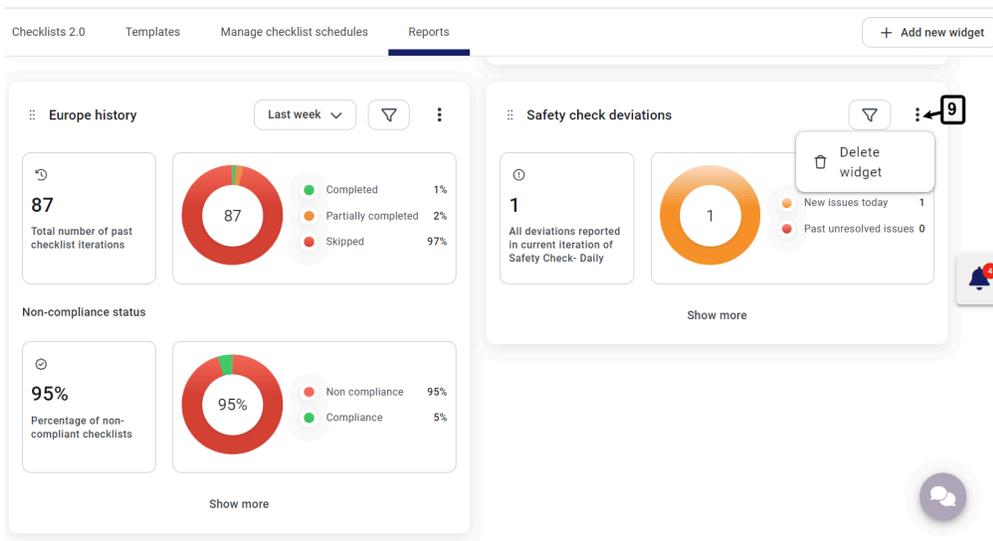
8. When you are on a custom dashboard widget and add or remove some options from the applied filter on this widget, you can click the **Update widget** button to save the widget with the updated filter.



The screenshot shows the 'Europe history' widget with a callout box labeled '8' pointing to the 'Update widget' button. The widget displays a donut chart for 'Total number of past checklist iterations in all listed locations' with a value of 51. Below the chart is a table with columns: Checklist, Schedule name, Total locations, Non compliance, Status, and Closed.

Checklist	Schedule name	Total locations	Non compliance	Status	Closed
Daily gym opening	Daily morning routine Gym	4	92%	■	2025-07-06, 23:59
Daily gym opening	On-demand Gym Routines	1	100%	■	2025-07-07, 13:10
Safety Check - Daily	Daily Safety check	4		■	2025-07-07, 12:59

9. You can **delete** a custom widget from your Reports dashboard by clicking the relevant option for it on the dashboard.



The screenshot shows two widgets on the dashboard. The 'Europe history' widget displays a donut chart for 'Total number of past checklist iterations' with a value of 87. The 'Safety check deviations' widget displays a donut chart for 'All deviations reported in current iteration of Safety Check - Daily' with a value of 1. A callout box labeled '9' points to the 'Delete widget' button in the top right corner of the 'Safety check deviations' widget.