

Chainformation Admin User Guide

(Checklists 2.0 Set-up and Configuration)

Last Updated: February 27, 2026

Welcome to the **Chainformation** user guide. In this version of Checklists 2.0 manual, we will learn how to create new checklists and schedules in the module.

With this Checklists 2.0 module, the checklist/tasklist (what to do) is separated from Schedule (when, who and where). Now, you can connect one checklist with multiple schedules, which is valuable if you have locations with different opening hours as an example. These schedules could be recurring, one-time and on-demand. You can also create Brand Audit Checklists and audit schedules in a separate module. See the user guide for **Audit checklists**

Checklist and Audit schedules have their own sharing selection and time settings which are independent of each other. This allows you to run the same checklist or audit with different time schedules for different locations, areas, business areas and/or roles. It will allow you to exactly tailor access to local conditions.

This document only has user guides on how to create a new checklist 2.0 and schedule it for different locations. Please see the user guide for **Checklists 2.0 Completion** to get detailed instructions on how to complete a checklist 2.0 for your current location and manage its relevant settings. Refer to the user guide for **Checklists 2.0 Reports dashboard** to learn how to review and manage checklist reports data from ongoing and past iterations.

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 create and manage checklists 2.0, checklist schedules 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.

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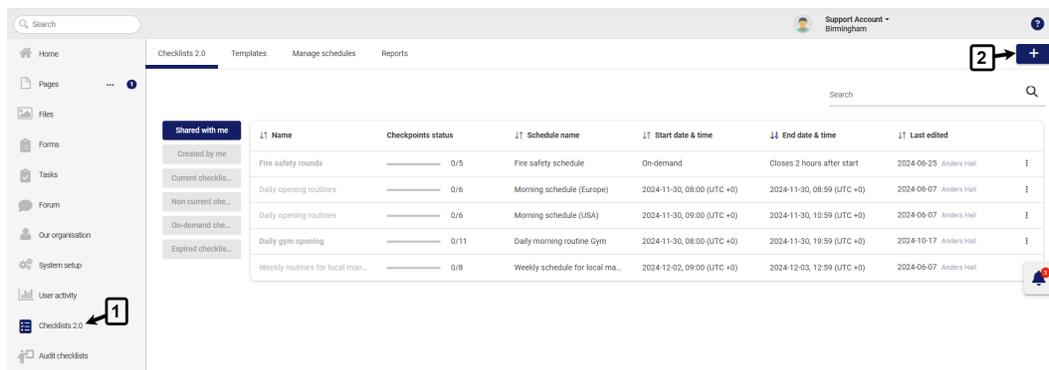
Create a New Checklist 2.0

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

Note: You must have **Administrate** right on at least local level of Checklists 2.0 module to create a new checklist. [See the user guide for Roles administration](#)

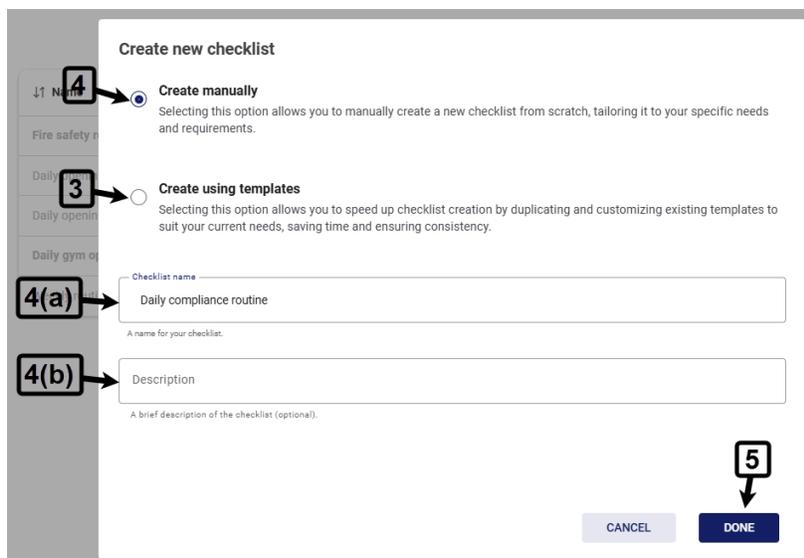
1. Click the **Checklists 2.0** button in the left-side menu to open the Checklists 2.0 tab.

Note: You cannot create or edit **Checklists 2.0** on the **Chainformation** mobile app due to screen space restrictions. Therefore, you must log in to the **Chainformation** website platform to create a new checklist or edit a saved checklist. However, all users can easily access, use and complete a scheduled checklist in the mobile app.



2. Click the (+) icon in the top-right corner of the **Checklists 2.0** page to create a new checklist.

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



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

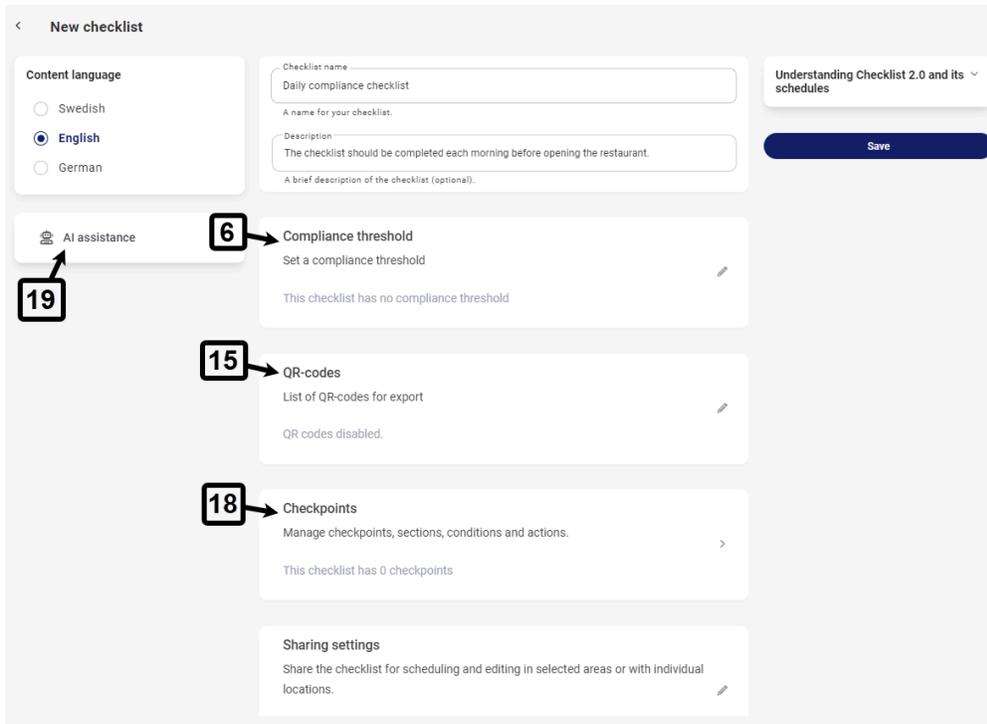
When you choose a template to create a checklist, this template name, checkpoints, compliance settings are copied to the new checklist and you can save this checklist after selecting appropriate sharing settings for it. You can customize checklist data duplicated from a template according to your requirements before saving this checklist.

4. You can choose the **“Create manually”** option in the **Create new checklist** pop-up to create a new checklist from scratch.

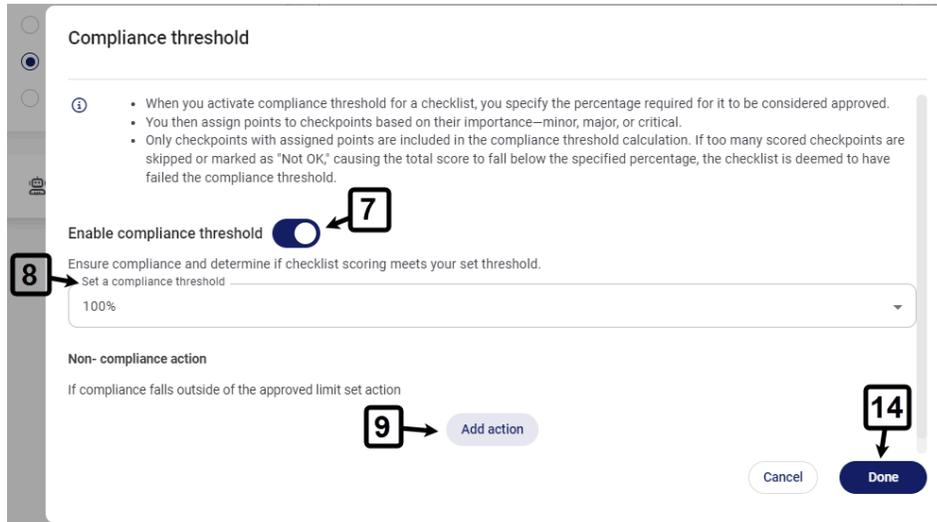
4(a). Enter a **Checklist name**. This should be explanatory, short and concise.

4(b). Enter a brief presentation (If needed) of the new checklist in the **Description** field.

5. After you have chosen a checklist template or entered its name, description manually, click **DONE** button on the **Create new checklist** pop-up to go to the **New checklist** page.



6. Click on **Compliance threshold** card on **Create new checklist** page to set a compliance threshold for this checklist (if required).



7. When you **Enable compliance threshold** for a checklist, this feature calculates an overall compliance threshold level based on checkpoints scores.

By default, the compliance threshold of a checklist is set to 100% after you enable it.

8. You can select another value from the “**Set a compliance threshold**” dropdown.

For example, setting the compliance threshold at 90% means that a score of 90% or higher is considered compliant. Refer to items 28, 29 in this user guide to learn how to set **checkpoints scoring**

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

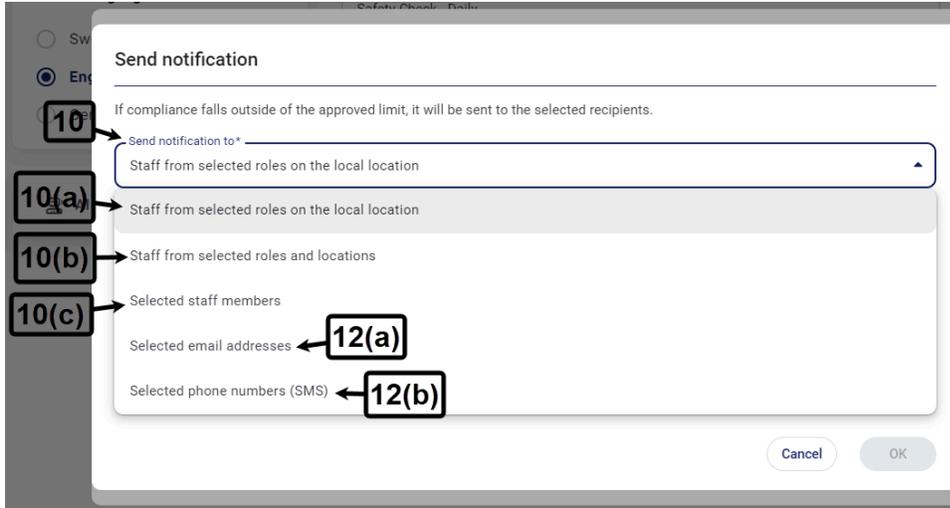
9. Click on **Add action** button to open **Send notification** editor.

10. On Send notification editor, choose roles and users who should get this notification.

10(a). When you choose “**Staff from selected roles on the local location**” e.g. local manager to receive this notification, all users who have access to this role from their profile will receive a notification every time this checklist is flagged non-compliant in an iteration.

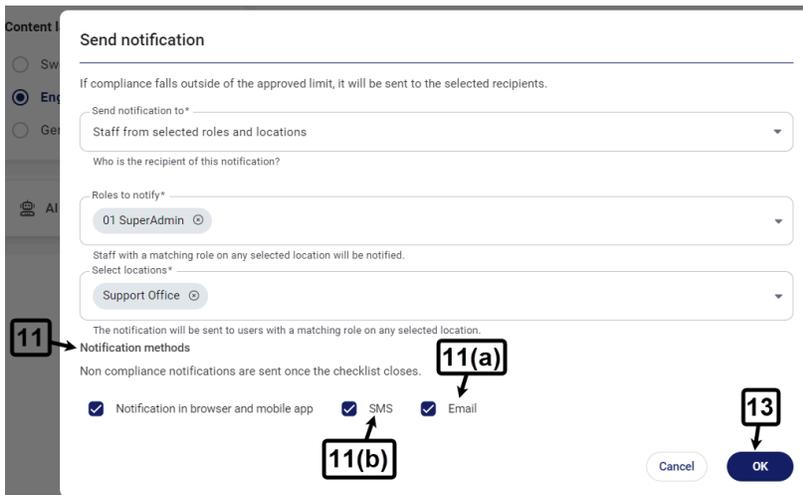
10(b). You can choose “**Staff from selected roles and locations**” e.g. global sales manager from company head office to receive non-compliance notification from this checklist.

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



11. By default, users get non-compliance notifications on browser and mobile app.

You can also choose to send this notification as email and SMS to selected colleagues on their primary email address and phone number (if available) under **Notification method** header.



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

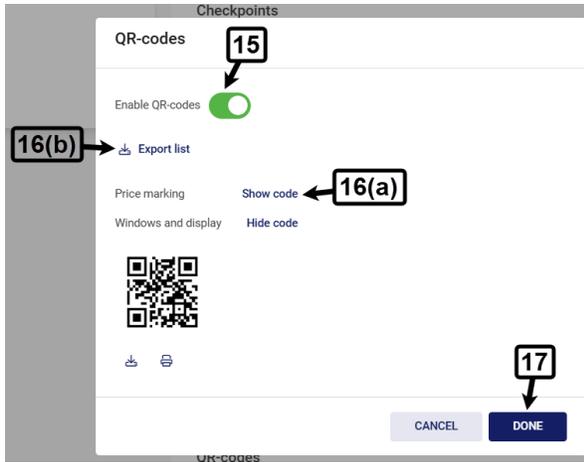
13. Once you have added all required details on the Send **notification** editor, click the OK button to save this automated non-compliance alert.

14. Now, click the **DONE** button on the Compliance **threshold** card to save compliance settings for this checklist and non-compliance (if any).

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

By default, QR-codes are disabled for a checklist.

15. You can **Enable QR-codes** from the QR-codes **card** on the New **checklist** page to add mandatory QR-code conditions for checkpoints on this checklist. Refer to item 32 in this user guide to learn how to add **mandatory QR-code condition** for checkpoints

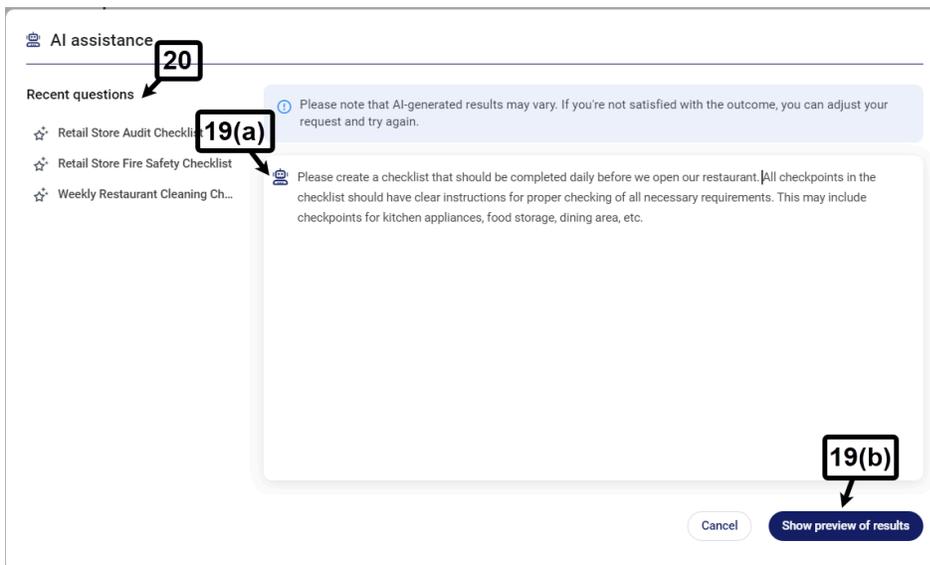


16. Once you have added at least one checkpoint on this checklist, you can **view** and **Export list** of all checkpoints on this card. Refer to items 21-65 in this user guide to learn how to **add new checkpoints** in a checklist

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

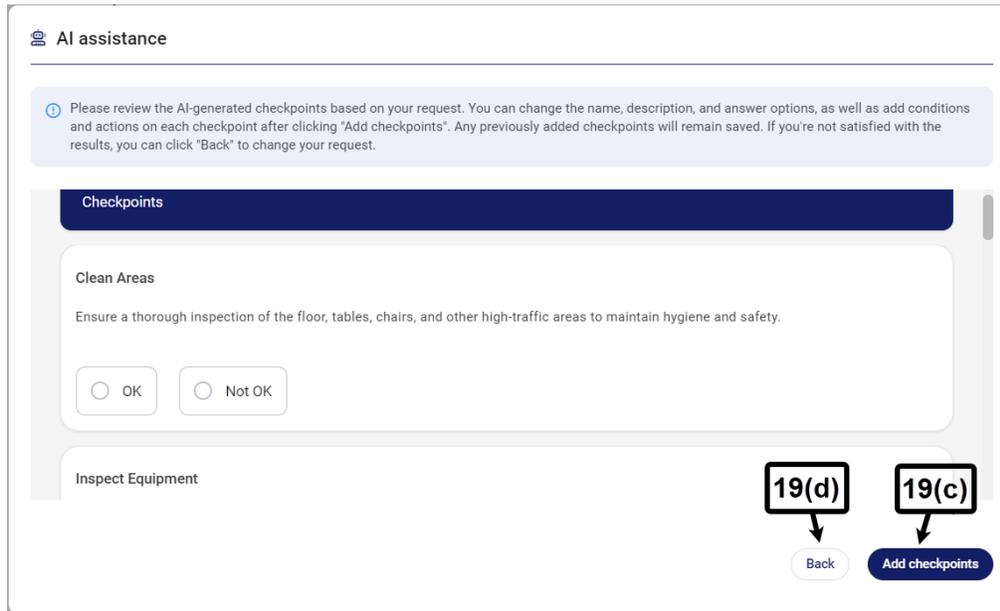
18. Click on the **Checkpoints** card on the **New checklist** page to manage checkpoints, sections, conditions and actions for the new checklist.

19. You can use the **AI assistance** feature on the **New checklist** editor main page or **Checkpoints** page to generate checkpoints from ChatGPT.



19(a). On the **AI assistance** modal window, add your text prompt in the **Ask AI** search bar to generate relevant checkpoints from ChatGPT.

19(b). Click on the **Show preview of results** to review checkpoints generated by AI based on your request.

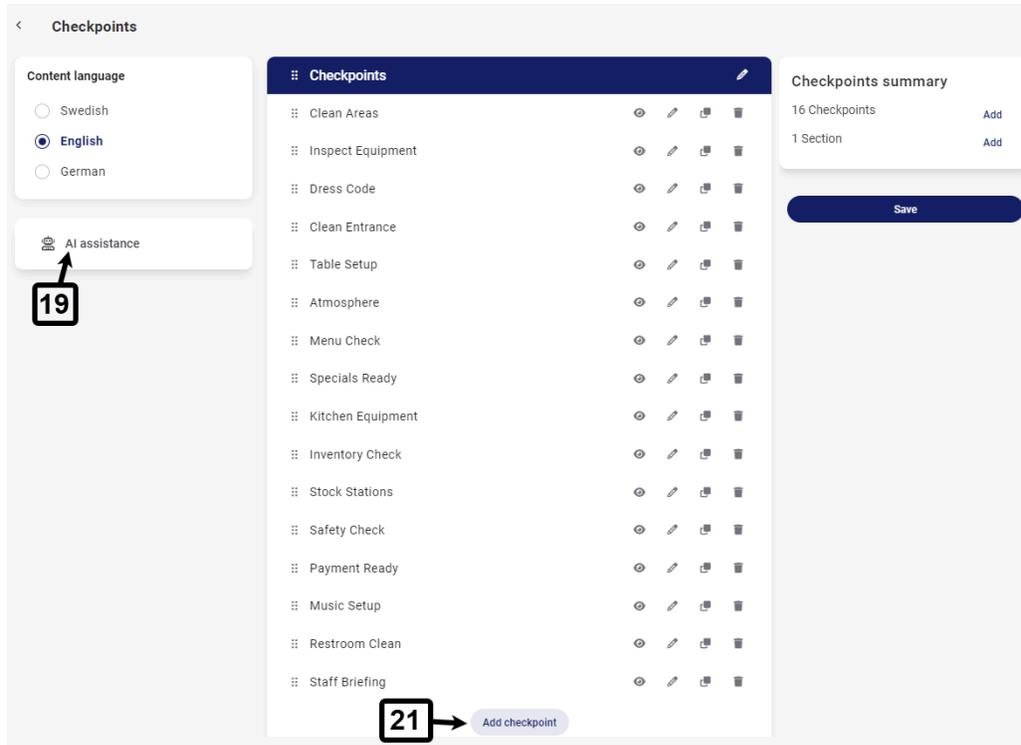


19(c). After reviewing the AI-generated checkpoints, click the **Add checkpoints** button to add these checkpoints in your checklist.

Any previously added checkpoints will remain saved after adding the AI-generated checkpoints in the checklist. You can change the name, description, and answer options, as well as add conditions and actions on each checkpoint after clicking "Add checkpoints". Any previously added checkpoints will remain saved. Refer to items 22-65 on this user guide to learn how to **edit checkpoints** in a checklist

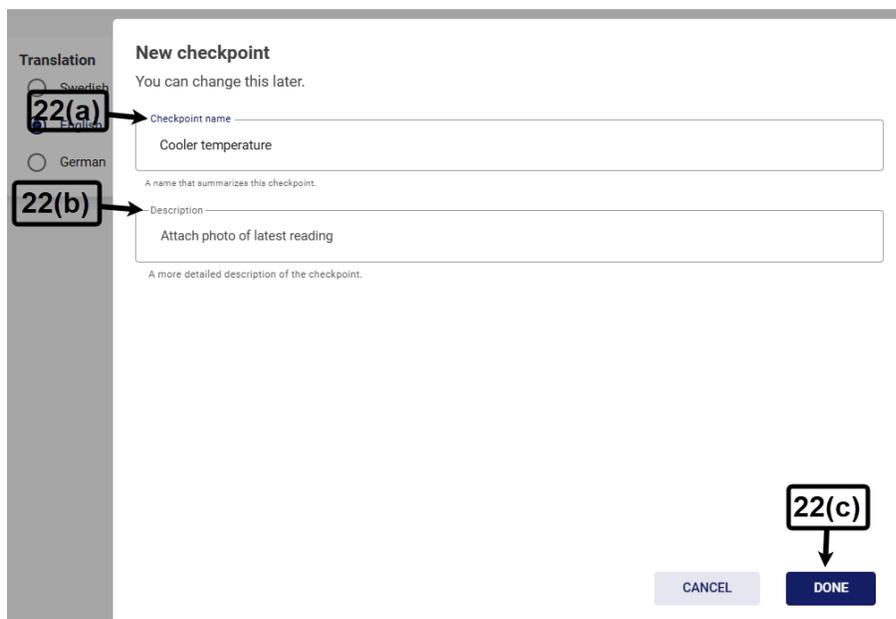
19(d). If you're not satisfied with the results, you can click "**Back**" to change your request and generate checkpoints based on the new request.

20. You can also insert one of your **recent questions** in the **Ask AI to generate checkpoints** search bar.



21. On the **Checkpoints** page, click the **Add checkpoint** button to manually add a new checkpoint.

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



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

23. Select **Answer options** for the new checkpoint on the **General** tab of the **Edit checkpoint** page.

24. If you select the **“Status”** answer option, users will answer this checkpoint as OK or Not OK.

25. If you select the **“Measurement”** answer option, users will answer this checkpoint by entering a numeric value in a defined unit.

26. If you have selected the measurement answer option, select **“Measurement unit”** in which users will answer this checkpoint. This is only a label with no actual functionality.

27. Select **“Value ranges”** that should be considered OK or Not OK. You can choose value ranges as follows:

27(a). Any value between selected minimum and maximum numbers is OK or Not OK e.g. cooler temperature between 35.5⁰F and 42.7⁰F is OK.

27(b). Any value greater than or equal to a selected number is OK or Not OK e.g. cooler temperature greater than or equal 42.8⁰F is Not OK.

27(c). Any value less than or equal to a selected number is OK or Not OK e.g. cooler temperature less than or equal to 35.4^oF is Not OK.

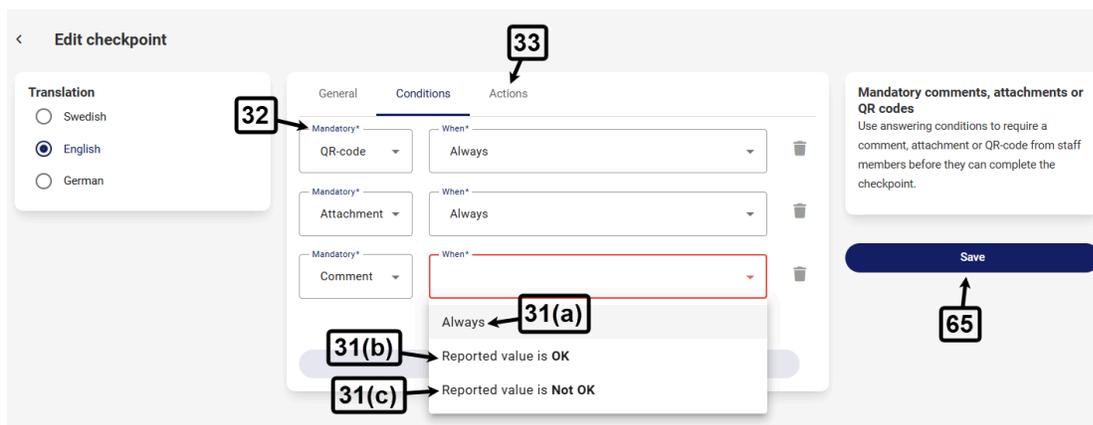
Remember, all undefined numbers that don't fall under any of listed value ranges are considered Not OK. So, you should add at least one OK range for a measurement checkpoint.

28. Enable **Scoring** feature if this checkpoint answer should be considered when calculating compliance score of this checklist (if applicable).

Remember, **Scoring** feature for a checkpoint will be available only if **Compliance threshold** is enabled for this checklist. Refer to items 6-8 in this user guide to learn how to **enable compliance threshold** for a checklist

29. After enabling checkpoint **Scoring**, select an appropriate compliance category and corresponding score for this checkpoint.

30. Now, go to **Conditions** tab to add mandatory comment, attachment or QR code conditions for the new checkpoint.



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

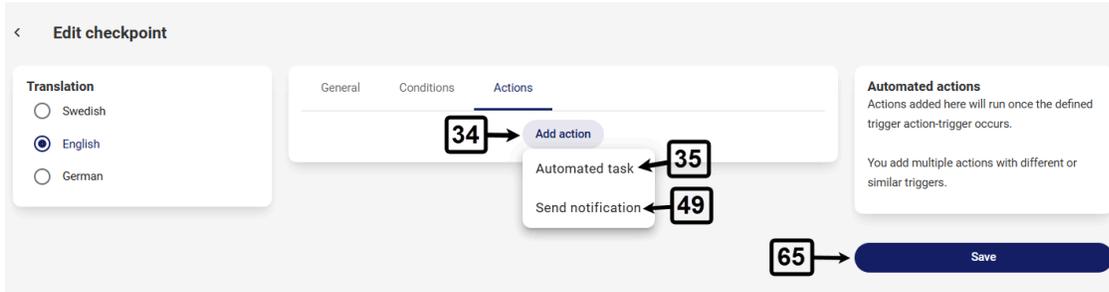
31(b). You can add “**attachment/comment is mandatory when answer is OK**” condition.

31(c). You can add “**attachment/comment is mandatory when answer is Not OK**” condition.

32. You can add **mandatory QR-code** condition for a checkpoint that means users can answer it only after scanning QR-code of this specific checkpoint.

Remember, you can add mandatory QR-code condition for a checkpoint only if QR-codes are enabled for this checklist. QR-codes of all checkpoints in a checklist are found in QR-codes card on checklist editor page. Refer to item 15 in this user guide to learn how to **enable QR-codes** for a checklist

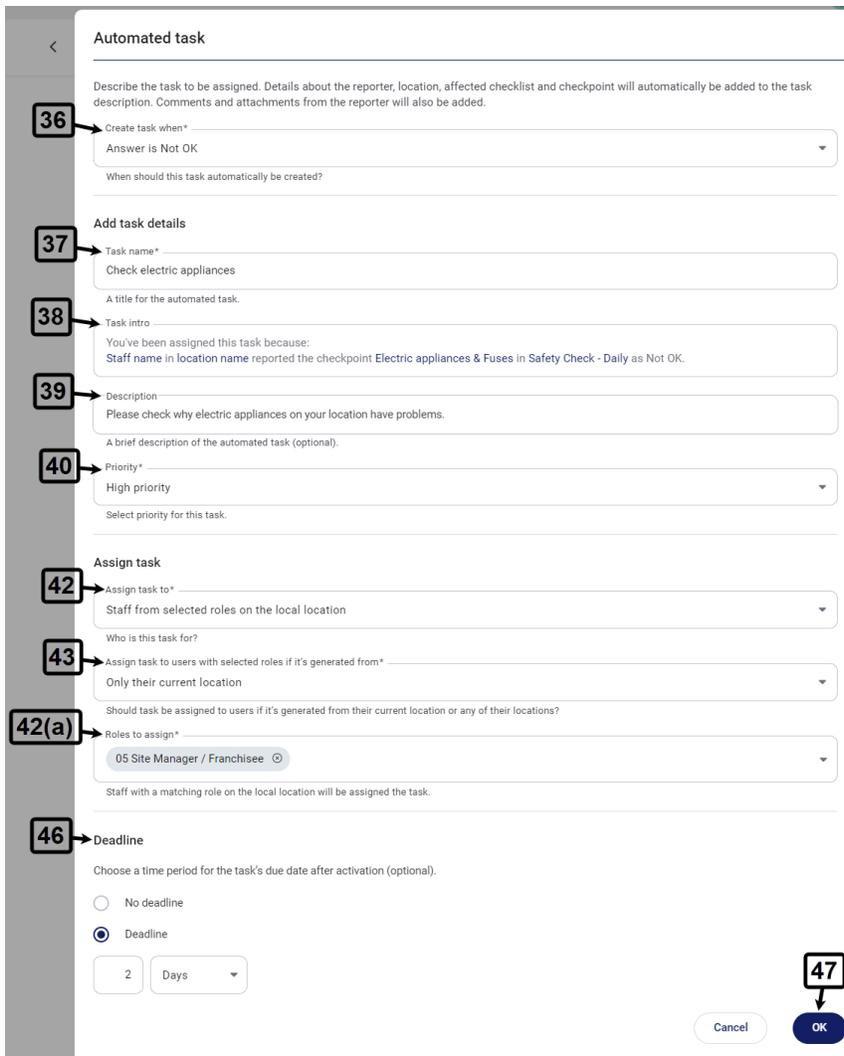
33. Now, go to **Actions** tab to add automated actions for this checkpoint.



34. Click on the **Add action** button on the **Actions** tab to add an automatic action.

35. Click on the **Automated task** button from **Add action dropdown** to create an automated task action.

This will open the **Automated task editor** pop up.



36. Choose when this task should be created for selected colleagues.

36(a). If you choose the “**Answer is Not OK**” option, a task will be created for selected colleagues when a deviation occurs on this checkpoint i.e. it’s answered Not OK in a checklist iteration.

36(b). If you choose the “**Checkpoint is skipped**” option, a task will be created for selected colleagues when this checkpoint is not answered in a checklist iteration.

Note: We don’t create repeated tasks from an automated task action with identical information for the same assignees in Tasks module until the previous task from the same checkpoint and location is already completed.

A new task can also be created even if the previous one is incomplete when the relevant location changed the checkpoint status in an iteration i.e.

- Not OK → OK → Not OK for “**Answer is Not OK**” option (item 36a)
- Skipped → Answered → Skipped for “**Checkpoint is skipped**” option (item 36b)

Now, add task name, assignment options and other relevant details.

37. Write a **Task name** for this automated action.

38. Task intro including name of user who answered this checkpoint, their location name, affected checklist, checkpoint, comment and attachments (if any) will automatically be added to the task description.

39. You can further describe what needs to be done in the **Description** field.

40. You can define priority of tasks created from this automated action by selecting either of these three options:

- Low
- Medium
- High

Note: All automated tasks have the default Medium priority unless you select another option.

41. Choose roles and users who should be assigned this task.

42. You can choose “**Staff from selected roles on the local location**” e.g. local manager as task assignee. Users who have access to this role from their profile will be assigned this task when checkpoint action defined in item 23 is reported from their current location or any location from their profile based on the rule defined below (item 42).

43. “**Staff from selected roles on the local location**” option for task assignees has two secondary options as follows:

43(a). “**Only their current location**” option is selected: Task is assigned to users from selected roles on the local location only if the user currently belongs to this specific location. This task is not assigned to users who have access to the selected role and relevant location from their profile but currently belongs to a different location.

43(b). “**Any location the user belongs to**” option is selected: Task is assigned to all users with selected roles on the local location even if a user currently belongs to a different location.

44. You can choose “**Staff from selected roles and locations**” from the “**Assign task to**” dropdown (item 41) e.g. global sales manager from company head office.

45. You can also choose “**Selected staff members**” as task assignees.

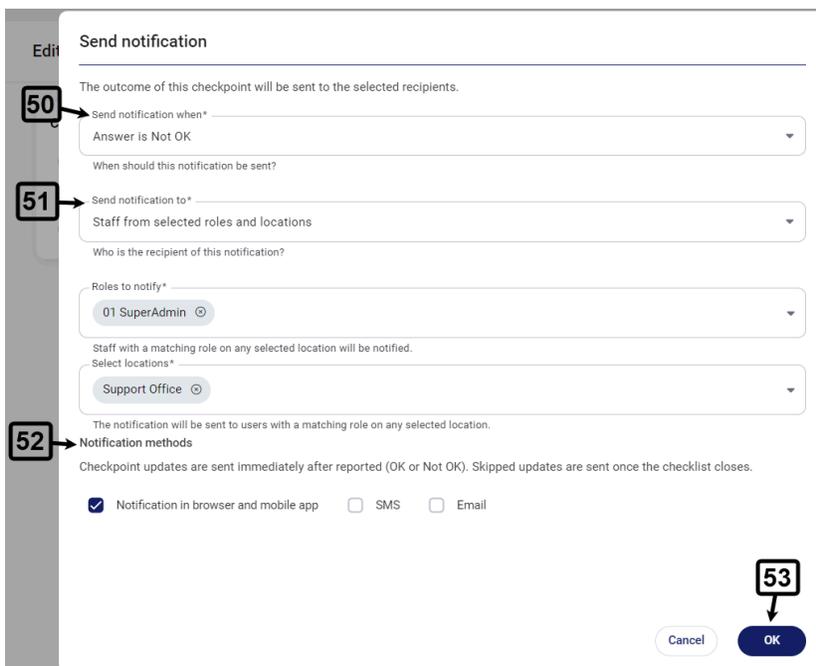
46. Choose a time period for the **due date** of tasks created from this automated action (if required).

47. Once you have added all required details on **Automated task editor**, click **OK** button to save this checkpoint action.

48. Click on the **Add action** button on the **Actions** tab to add another automatic action.

49. Click on the **Send notification** button to create an automated notification action.

This will open the **Send notification editor** pop up.



Send notification

The outcome of this checkpoint will be sent to the selected recipients.

50 Send notification when*
Answer is Not OK

When should this notification be sent?

51 Send notification to*
Staff from selected roles and locations

Who is the recipient of this notification?

Roles to notify*
01 SuperAdmin

Staff with a matching role on any selected location will be notified.

Select locations*
Support Office

The notification will be sent to users with a matching role on any selected location.

52 Notification methods
Checkpoint updates are sent immediately after reported (OK or Not OK). Skipped updates are sent once the checklist closes.

Notification in browser and mobile app SMS Email

53
Cancel OK

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

50(a). If you choose the “**Answer is Not OK**” option, a notification will be sent to selected colleagues every time a deviation occurs on this checkpoint i.e. it’s answered “Not OK” in a checklist iteration.

50(b). If you choose the “**Answer is OK**” option, a notification will be sent to selected colleagues every time this checkpoint is answered OK in a checklist iteration.

50(c). If you choose the “**Checkpoint is answered**” option, a notification will be sent to selected colleagues every time this checkpoint is answered either OK or Not OK in a checklist iteration.

50(d). If you choose the “**Checkpoint is skipped**” option, a notification will be sent to selected colleagues every time this checkpoint is not answered in a checklist iteration.

51. Choose roles and users who should get this notification.

51(a). When you choose “**Staff from selected roles on the local location**” e.g. local manager to receive this notification, all users who have access to this role from their profile will receive a notification every time checkpoint action defined in item 23 is reported from their current location.

51(b). You can choose “**Staff from selected roles and locations**” e.g. global sales manager from company head office to receive this notification.

51(c). You can also choose “**Selected staff members**” to receive this notification.

52. By default, users get checkpoint update notifications on browser and mobile app.

You can also choose to send this notification as email and SMS to selected colleagues on their primary email address and phone number (if available).

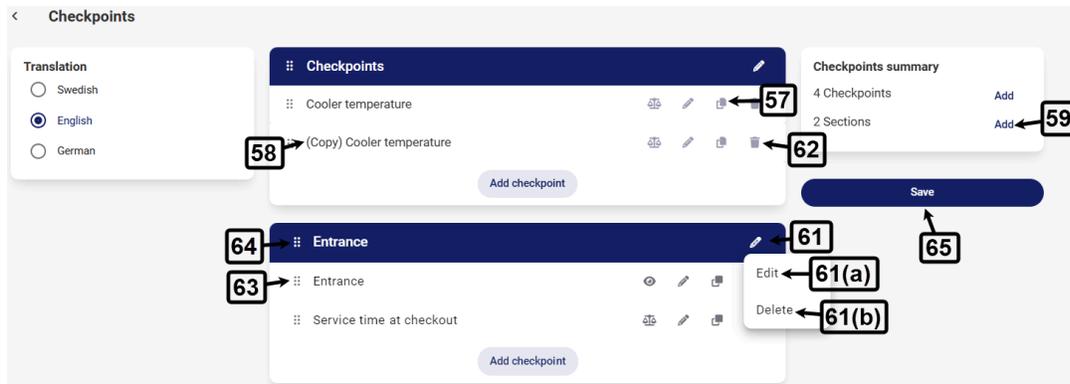
53. You can also choose to send this notification to **Selected email addresses** or **phone numbers (SMS)** that are not even associated with any user in your organisation.

54. Once you have added all required details on **Send notification editor**, click **OK** button to save this checkpoint action.

55. You can add more automated tasks following items 35-47 and notifications following items 48-53 from this user guide.

56. Now, review all information you have added on **General**, **Conditions** and **Actions** tabs of **Edit checkpoint** page and click **Save** button to save this checkpoint and its settings.

This will redirect you to **Checkpoints** page of **New checklist** editor where you can add more checkpoints in this checklist by following items 21-65 from this user guide.



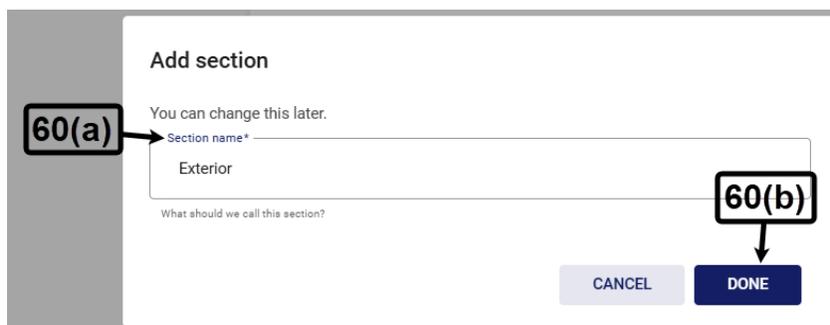
57. You can also create copies of added checkpoints by clicking the **Copy checkpoint** button next to its name.

58. This will create a new checkpoint with exactly the same settings as in the original checkpoint that you can edit as required.

By default, all checkpoints in a checklist are added in one section.

59. You can add more sections in a checklist by clicking the **Add** button next to **Sections** label in **Checkpoints summary** card on **Checkpoints** page.

60. This will open the **Add section** pop up where you can add a new checkpoints section after adding its name.



61. You can **edit** a section name or **delete** this section by clicking **Edit** (✎) icon next to its name.

Remember, when you delete a section, all checkpoints in this section are also deleted.

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

63. You can move checkpoints up and down in a section or move them to another section using drag and drop feature.

64. You can also move checkpoints sections up and down using drag and drop feature.

65. Once you have added all checkpoints and sections, click **Save** button on **Checkpoints** page to save these checkpoints and sections.

This will redirect you to the **New checklist** editor main page.

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

67. By default, a checklist is set to **“Share”** status.

68. You can also set its status to “**Not shared**”.

Remember, when a checklist is set to **Not shared** status, it’s not available for scheduling to any user except checklist creator.

69. If you choose to keep “**Share**” status for this checklist, select areas/locations and business areas to which you want to share it. [See the user guide for Sharing selection](#)

70. You can also share a checklist with one of your quick selections and save manually added sharing options as a new quick selection. [See the user guide for Quick selections](#)

Once you save this checklist, it will be available for scheduling to users with appropriate rights from selected areas and locations. [See the user guide for Create a checklist schedule](#)

71. Click the **Save** button on the **Sharing settings** card to save sharing preferences for this checklist.

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

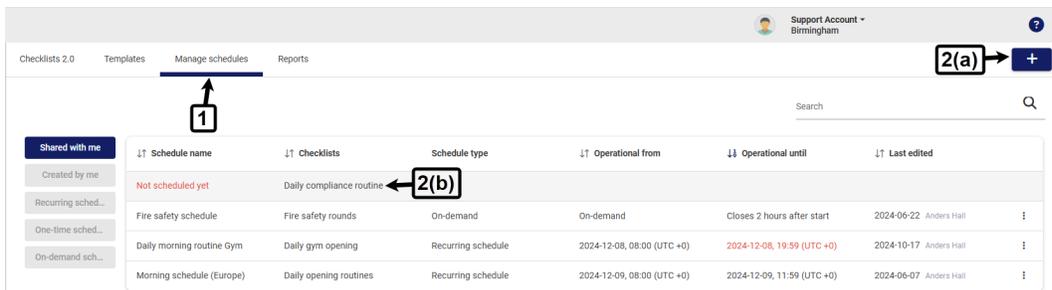
72. Review all checkpoints, settings for this checklist and click **Save** button on **New checklist** page to save it.

Remember, a new checklist is not available for completion until it’s connected with at least one schedule.

Now, we will learn how to create a new checklist schedule, share it to different locations and roles for completion.

Create a Checklist Schedule

1. Follow the navigation steps demonstrated in the previous section to access **Checklists 2.0** module and go to **Manage schedules** tab on this module to schedule a checklist.



Share with me	↓↑ Schedule name	↓↑ Checklists	Schedule type	↓↑ Operational from	↓↑ Operational until	↓↑ Last edited
Created by me	Not scheduled yet	Daily compliance routine				
Recurring sched...	Fire safety schedule	Fire safety rounds	On-demand	On-demand	Closes 2 hours after start	2024-06-22 Anders Hall
One-time sched...	Daily morning routine Gym	Daily gym opening	Recurring schedule	2024-12-08, 08:00 (UTC +0)	2024-12-08, 19:59 (UTC +0)	2024-10-17 Anders Hall
On-demand sch...	Morning schedule (Europe)	Daily opening routines	Recurring schedule	2024-12-09, 08:00 (UTC +0)	2024-12-09, 11:59 (UTC +0)	2024-06-07 Anders Hall

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

You cannot create or edit **Checklist schedules** on the **Chainformation** mobile app. Therefore, you must log in to the **Chainformation** website platform to create a new checklist schedule or edit a saved schedule. However, all users can easily access, use and complete a scheduled checklist in the mobile app.

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

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

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

2(c). If a checklist is not connected with any schedule yet, you can also access **New checklist schedule** pop-up for this checklist by clicking **Schedule checklist 2.0** option on **Checklists 2.0** table.

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

4. By default, new schedule has **Recurring** type.

5. You can change this to **One-time** or **On demand** schedule type.



6. After you have entered a schedule name and chosen its type, click **DONE** button on **New checklist schedule** pop-up to go to **Edit schedule** page.

7. If you start creating a schedule by clicking a not scheduled checklist from Manage schedules tab (item 2b) or clicking Schedule checklist 2.0 option for it from Checklists 2.0 table (item 2c), this checklist is pre-selected in **Scheduled checklist** field.

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

8. By default, all users with appropriate access level on Checklists 2.0 Reports module can view report for this schedule.

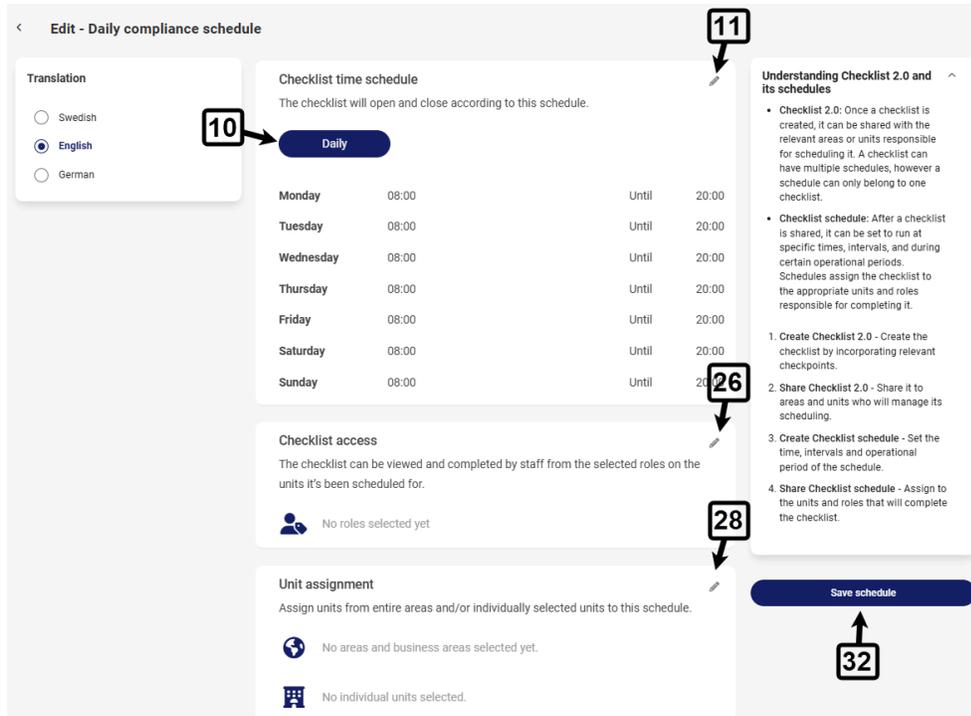
8(a). If you don't want other users to see report for this checklist schedule, you can deselect **"Allow other users to view the report for this schedule"** option in **Report setting**.

9. By default, a checklist schedule is **"continuously operational until stopped"** once you have saved this schedule.

9(a). You can set a checklist schedule to **"Operational for a selected period"**. This means this schedule will be available for completion in iterations defined in its time settings from operational period start date to end date of this period. Refer to items 11-23 in this user guide to learn how to **set time settings** of a checklist schedule

9(b). You can set a checklist schedule to **"Not operational"** status from Operational period settings.

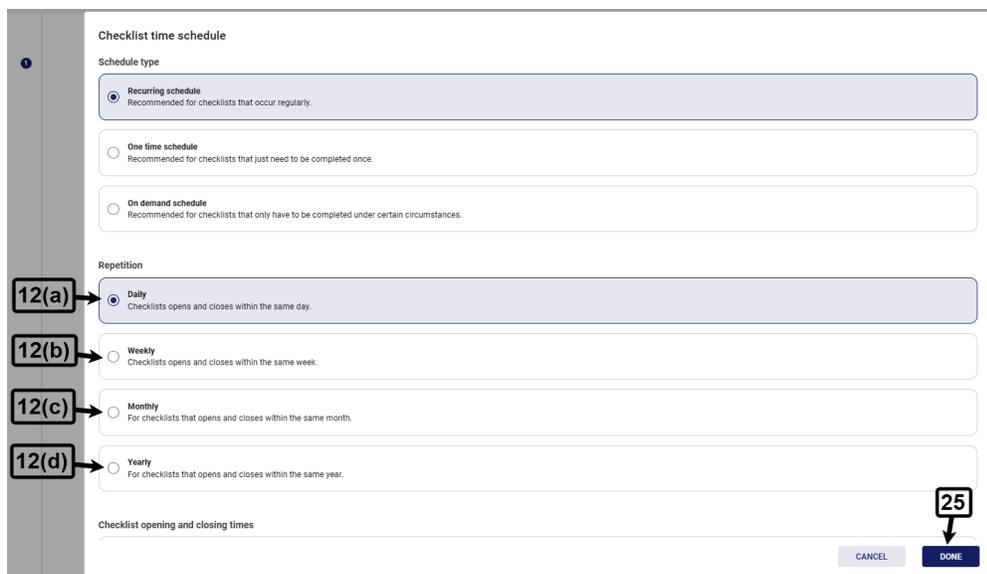
Remember, when a checklist schedule is set to **Not operational** status or has expired i.e. its operational period has ended, it's not available for completion unless its operational period settings are updated.



10. By default, a checklist schedule is set to recurring daily from 08:00 AM to 08:00 PM each day.

You can change time settings of this schedule on **Checklist time schedule** editor.

11. Click **Edit** (✎) icon on Checklist time schedule card to access time settings editor pop-up.



12. If it's a **recurring schedule**, you can set it to repeat **Daily**, **Weekly**, **Monthly** or **Yearly**.

13. By default, a **daily recurring** schedule has Start time 08:00 AM and End time 08:00 PM each day.

13(a). You can change Start or End time of a completion period by clicking its value.

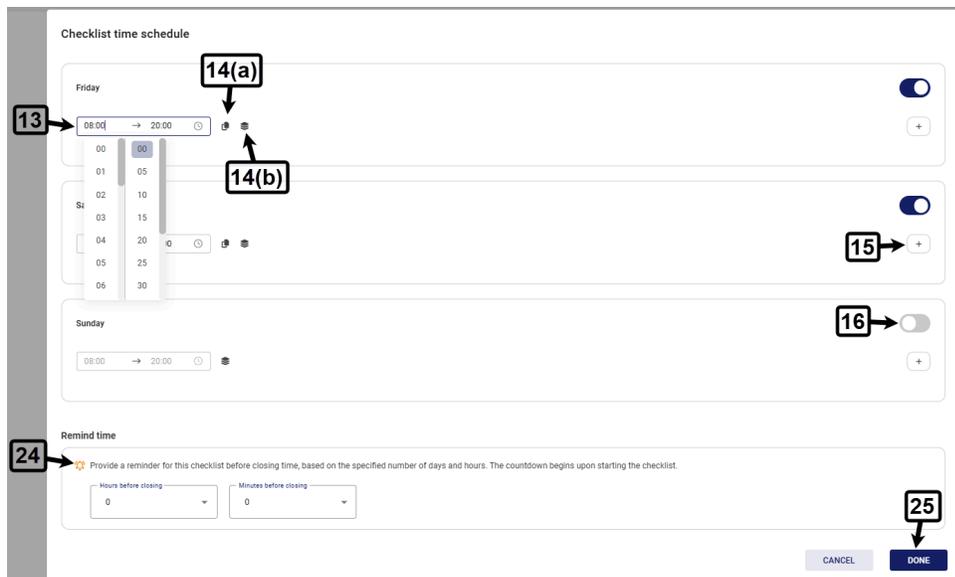
14(a). You can copy Start, End time of a completion period to next period of this schedule by clicking **Copy to next** button.

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

15. You can add additional periods on the same day by clicking **Add (+)** button.

16. You can **disable** a completion period by clicking toggle button for this period.

Remember, when a checklist completion period is disabled, this checklist schedule is not available for completion in this specific period until this period is enabled again.



13(a). You can change Start or End time of a completion period by clicking its value.

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

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

15. You can add additional periods on the same day by clicking **Add (+)** button.

16. You can **disable** a completion period by clicking toggle button for this period.

Remember, when a checklist completion period is disabled, this checklist schedule is not available for completion in this specific period until this period is enabled again.

17. When you set a schedule to **recurring weekly**, it has only one completion period by default that starts 08:00 AM, Monday and ends 08:00 PM, Sunday.

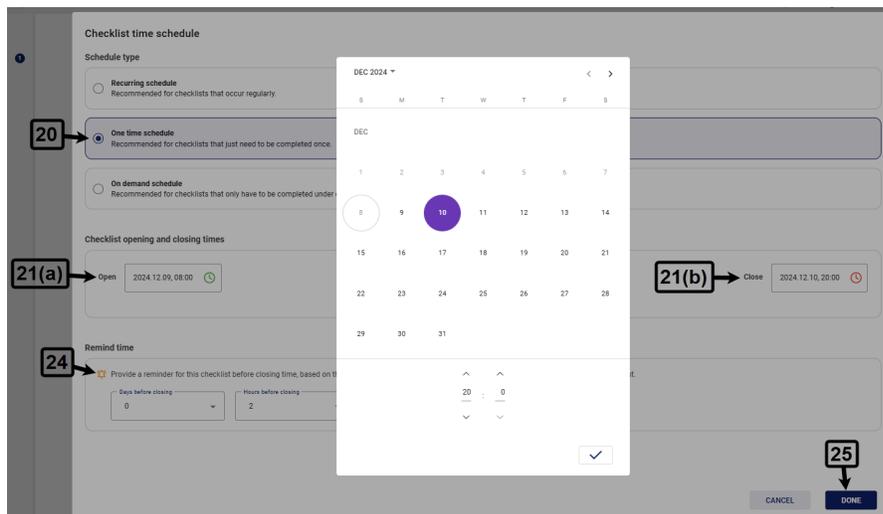
18. When you set a schedule to **recurring monthly**, its completion period starts 08:00 AM on first day each month and ends 08:00 PM on last day of this month.

19. When you set a schedule to **recurring yearly**, it has only one completion period by default that starts 08:00 AM, January 1 and ends 08:00 PM, December 31.

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

20. When you set a schedule type to **One-time**, this checklist schedule can be completed only once for a location.

21. You can set opening and closing times of a one-time checklist schedule by clicking **Open** and **Close** time fields respectively.



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

Fire safety rounds

Start the on-demand checklist. Start

Checkpoints to keep a unit prepared for possible fire

Checkpoints

Does this unit have clear and accessible escape routes?

OK Not OK

Comment

Is firefighting equipment available on required places?

OK Not OK

Checkpoints status

0%
Completed: 0
Not completed: 5

Save

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

23. You can set End time of an on-demand completion period to a different value from **Close checklist** after field.

Checklist time schedule

Schedule type

Recurring schedule
Recommended for checklists that occur regularly.

One time schedule
Recommended for checklists that just need to be completed once.

On demand schedule
Recommended for checklists that only have to be completed under certain circumstances.

Checklist opening and closing times

Open: On-demand

Close checklist after: 8 Hours

Remind time

Provide a reminder for this checklist before closing time, based on the specified number of days and hours. The countdown begins upon starting the checklist.

Hours before closing: 2
Minutes before closing: 0

CANCEL DONE

24. You can add a **Remind time** for this checklist schedule.

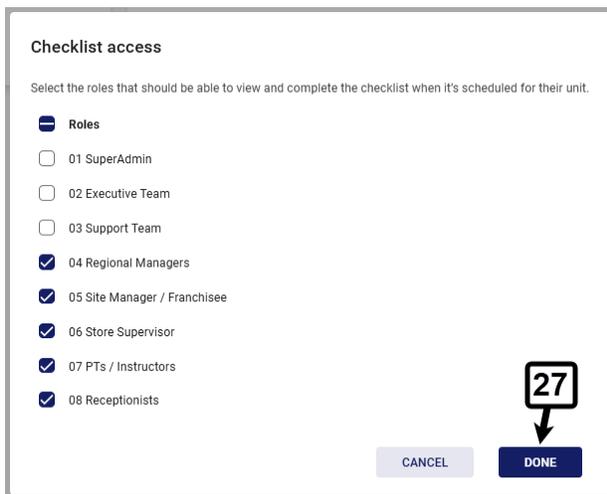
A checklist reminder for all schedule types is sent in all their completion periods before closing time. When the reminder time of a checklist completion period comes and a location has not completed all checkpoints on this checklist in this iteration yet, all users who have access to complete this checklist schedule for this location receive a reminder as a push notification on mobile app.

25. After you have set an appropriate schedule type and required time settings of its completion periods, click **DONE** button on **Checklist time schedule** pop-up to save these settings for new schedule.

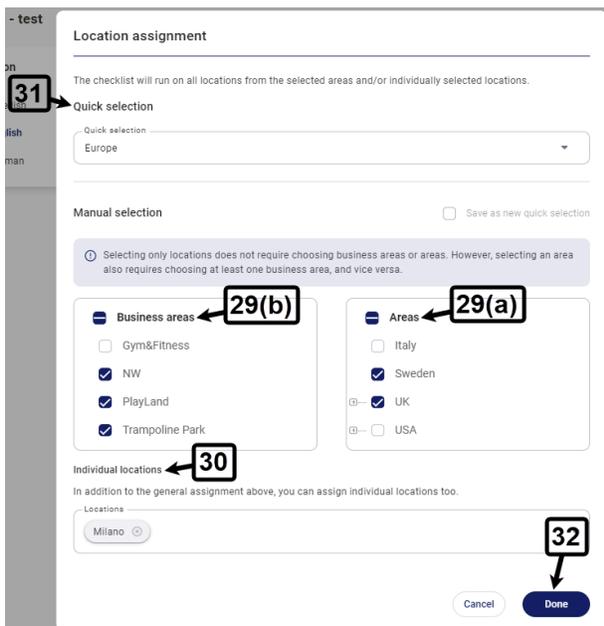
This will redirect you to **Edit schedule** page.

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

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



28. Click **Edit** (✏️) icon on **Location assignment** card to select locations you want to share this schedule with.



29. On the Location assignment card, select areas and business areas you want to share this schedule with.

This schedule will be shared to location from these areas and business areas once you save it. See the user guide for **Sharing selection**

30. You can share a schedule with individual locations directly by adding these locations in its location assignment settings.

31. You can also share a checklist schedule with one of your quick selections and save manually added sharing options as a new quick selection. See the user guide for **Quick selections**

32. After selecting the required locations, areas and business areas on the Location assignment card, click the **Done** button on this pop-up to save these selections for the new schedule.

33. Now, review all settings on the **Edit schedule** page and click the **Save** button to save this checklist schedule.

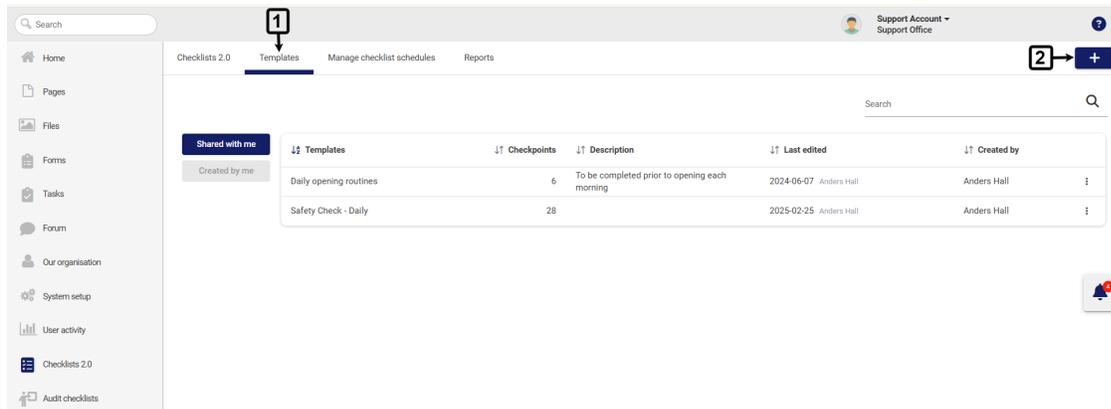
Once you save a new checklist schedule, users associated with selected roles from selected locations can complete it for their current location in iterations defined from Checklist time schedule settings. See the user guide for **Checklist 2.0 completion**

Create a New Checklist Template

Remember, you must have **Administrate** right on at least local level of Checklists 2.0 module to create a new checklist template. See the user guide for **Roles administration**

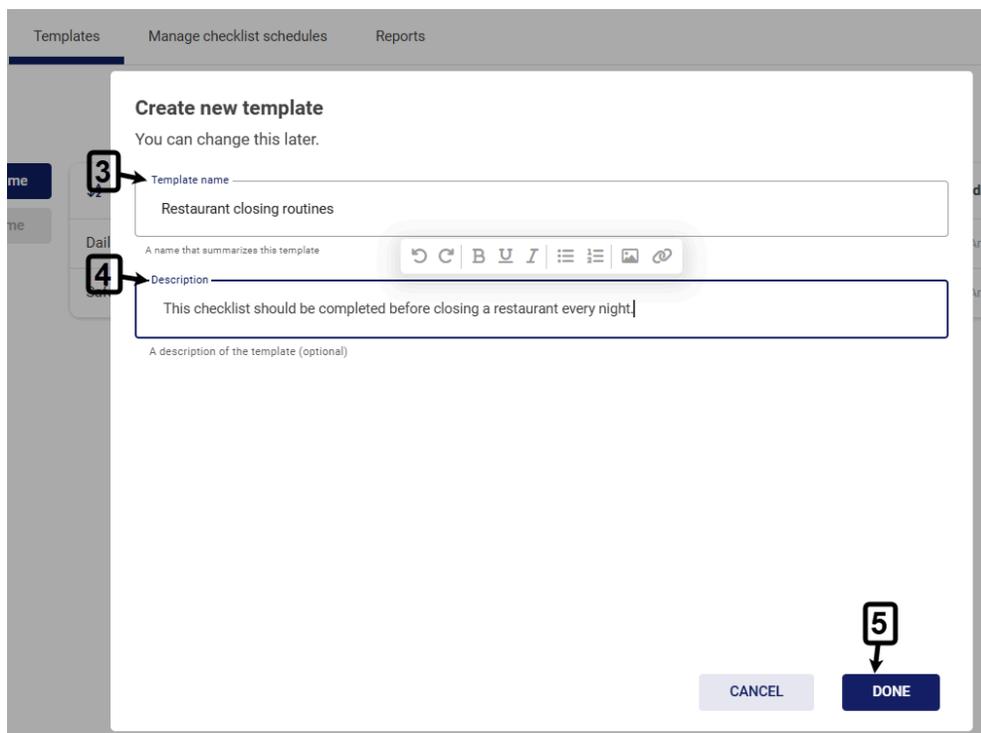
1. Follow the navigation steps demonstrated in the previous section to access **Checklists 2.0** module and go to the **Templates** tab on this module to schedule a checklist.

Note: You cannot create or edit **checklists templates** on the **Chainformation** mobile app due to screen space restrictions. Therefore, the **Templates** tab is not available on the app and you must log in to the **Chainformation** website platform to create a new template or edit a saved template.



2. Click the (+) icon in the top-right corner of the **Templates** page to create a new checklist template.

This will open the **Create new template** pop-up.



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

4. Enter a brief presentation (if needed) of the new template in the **Description** field.

5. After entering a template name and description (if any), click the **DONE** button on the **Create new template** pop-up to go to the **New template** page.

You can add checkpoints, compliance threshold and sharing settings for the new template following the navigation steps demonstrated in [the user guide on how to create a checklist 2.0](#).

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

Shared with me	Name	Checkpoints status	Schedule name	Start date & time	End date & time	Last edited
Created by me	Daily compliance routine	0/4	Not scheduled yet			2024-12-08 Support Account
Current checklis...	Daily gym opening		Daily morning routine Gym			
Non current che...	Safety Check - Daily	0/27	Daily Safety check	2025-03-04, 08:00 (UTC +0)	2025-03-04, 08:59 (UTC +0)	
On-demand che...	Fire safety rounds	0/6	Fire safety schedule	On-demand	Closes 2 hours after start	
Expired checklis...	Safety Check - Daily	0/28	Daily Routines	On-demand	Closes 30 minutes after start	

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

Once you save a template, you and your selected colleagues can use this template to create new checklists 2.0. [Refer to item 3 in the user guide on how to create a checklist 2.0](#)