

QUICK GUIDE CHECKLISTS



ACCESSING CHECKLISTS

1. Click **Document / Dashboard** ▾ ► **Checklists**.

STARTING A NEW CHECKLIST

1. Click **+** ▾ ► select the Checklist Type to be created.
2. Ensure that all mandatory fields are populated - any field with a red asterisk *.

* For Action

For Info

* Subject :

* Due date: dd-mm-yy

* Verified by company:

* Verified by:

3. Click **Save** to save the checklist without issuing. It can be issued later as required.

ISSUING A NEW CHECKLIST

1. Open the checklist ► click **Issue**.

Note: When issued, overdue or completed, notifications will be sent to the For Action and For Information users listed.

PARTICIPATING IN A CHECKLIST

1. In the checklist ► complete the items as required in each section like the example below:

1.1 Inspection partner name: Test Case

1.2 Time and date of inspection: 20-06-22 02:30 A...

1.3 What is this: Select a type Apply

1.4 Attach pictures of any issues: Attach files

File name	Size	
Penguins.jpg	760 KB	

1.3 Are entrances and exits to and from site free from obstructions?

- Yes - Yes
- No - No

2. Click Complete to notify the system that you have completed the relevant Sections and move the Checklist onto the Verifier.

VERIFYING A CHECKLIST

1. In the checklist ► complete verification section

Verified by company: Houston Contracting

Verified by: Joe Fredericks

Date verified: 14-06-22

Result: Passed Failed

Comments: Any comments

CREATING A NEW CHECKLIST TYPE

1. Select the **Actions** button ► Click **Manage Checklist Types**.

Actions ▾

- Manage checklist type
- Import checklist types from project
- Delete

2. Click **+** to create a new Checklist Type.
3. Fill out the mandatory fields.
4. In the section below, type a section header & drag and drop question types from the components section on the right.

* Checklist type ID

* Title

* Checklist category: Select one... ▾

SECTION

*Type section header here

Drag and drop question types here