Checklists in TimeTrak
For v4.0.34 onwards

User guide

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Introduction to Checklists in TimeTrak

To create a Checklist in TimeTrak, it is best to review your company's established, paper-based checklist(s)/forms. Using these, you can add the fields that you would like to replicate to your TimeTrak Checklist.

Anything that could be repeated in each Checklist or pulled from the databases (Exo and TimeTrak) can be added to the report.

For example, if the tech is going to select a Serviceable Unit then they should not have to also choose the serial no or any other fields that can be added to the report. They might hand write that currently but if the data is already in the database then use that. The simpler the Checklist for the end user, the better

- Health and Safety (JSA) Checklists – this usually has questions about site safety and photos of any identified issues. It also usually has the technicians sign off and is sent to both internal and external people.

- Service Checklists – This is usually very much a list of things that need to be ticked off and checked. They can be reminder/acknowledgment type questions. These are often for internal benefit.

- Maintenance Checklists – Again another list of things to be done checklist but more formal and often sent out externally. Often has the Client and Technicians signature to show work has completed.

- Certificates – Checklists can be used to produce a Certificate that an organisation might produce. They will often pull data from the Serviceable Unit worked on, or stock item, and have notes on compliance. These are usually sent both internally and externally.

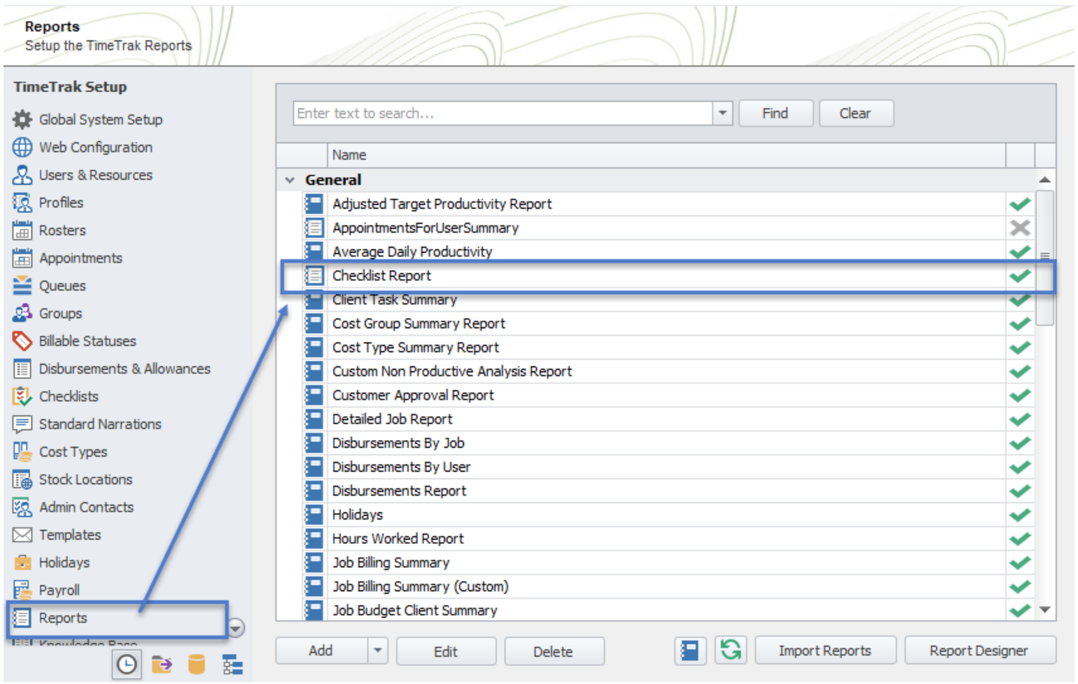
- Notices - these are usually strictly internal and are to let someone internally know that something needs to be done. Examples are moving a job to a new status or creating and assigning a Serviceable Unit.

Setting up a Checklist Report

Before a Checklist is started, a Checklist Report needs to be in place.

There is an 'out of the box' Checklist Report which will need to be updated with the organisations logos but it should pick up all the Checklist Items on any Checklist.

To make sure there is a Checklist Report, click on the **Reports** menu.

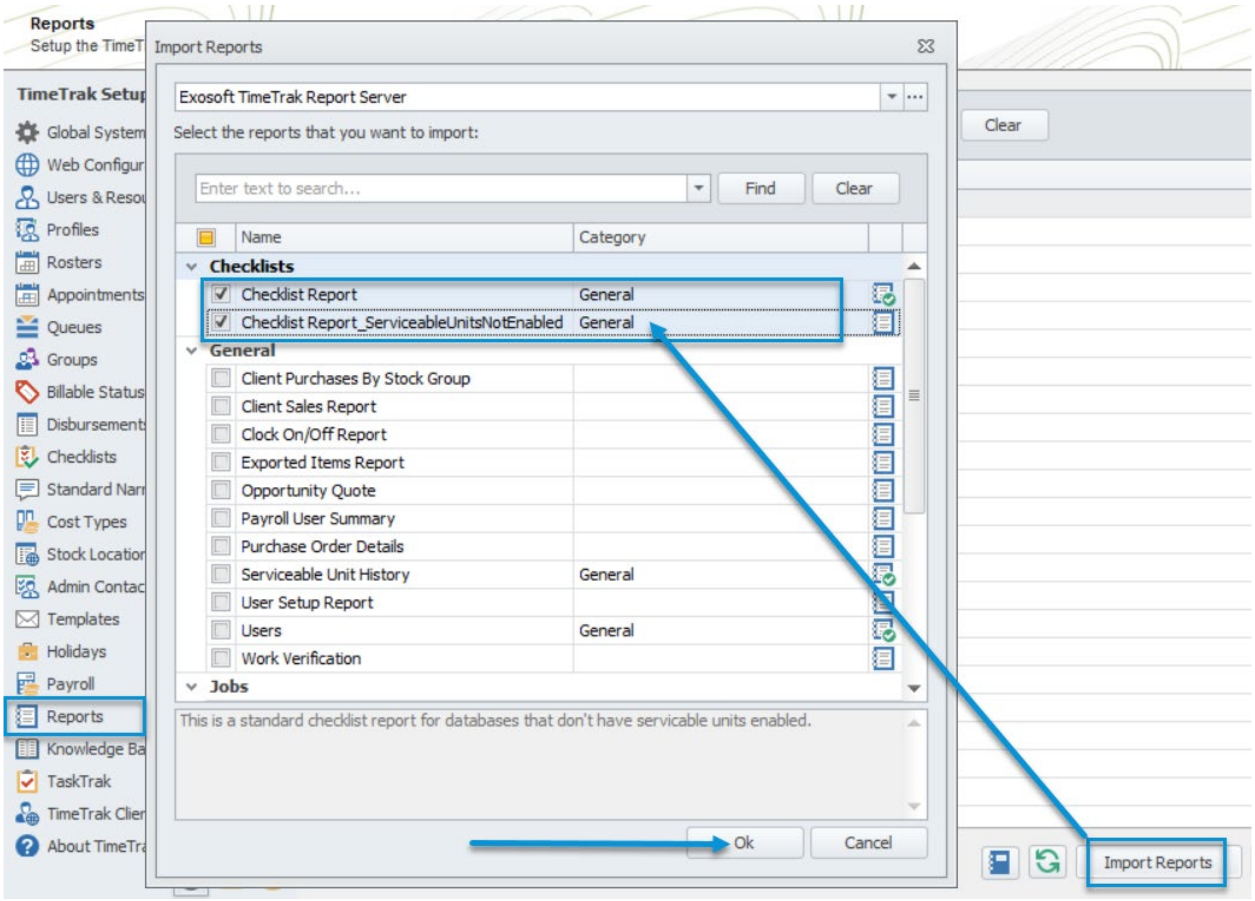


If there is no Checklist Report then the 'out of the box' Checklist Report can be added via the **Import Reports** button.

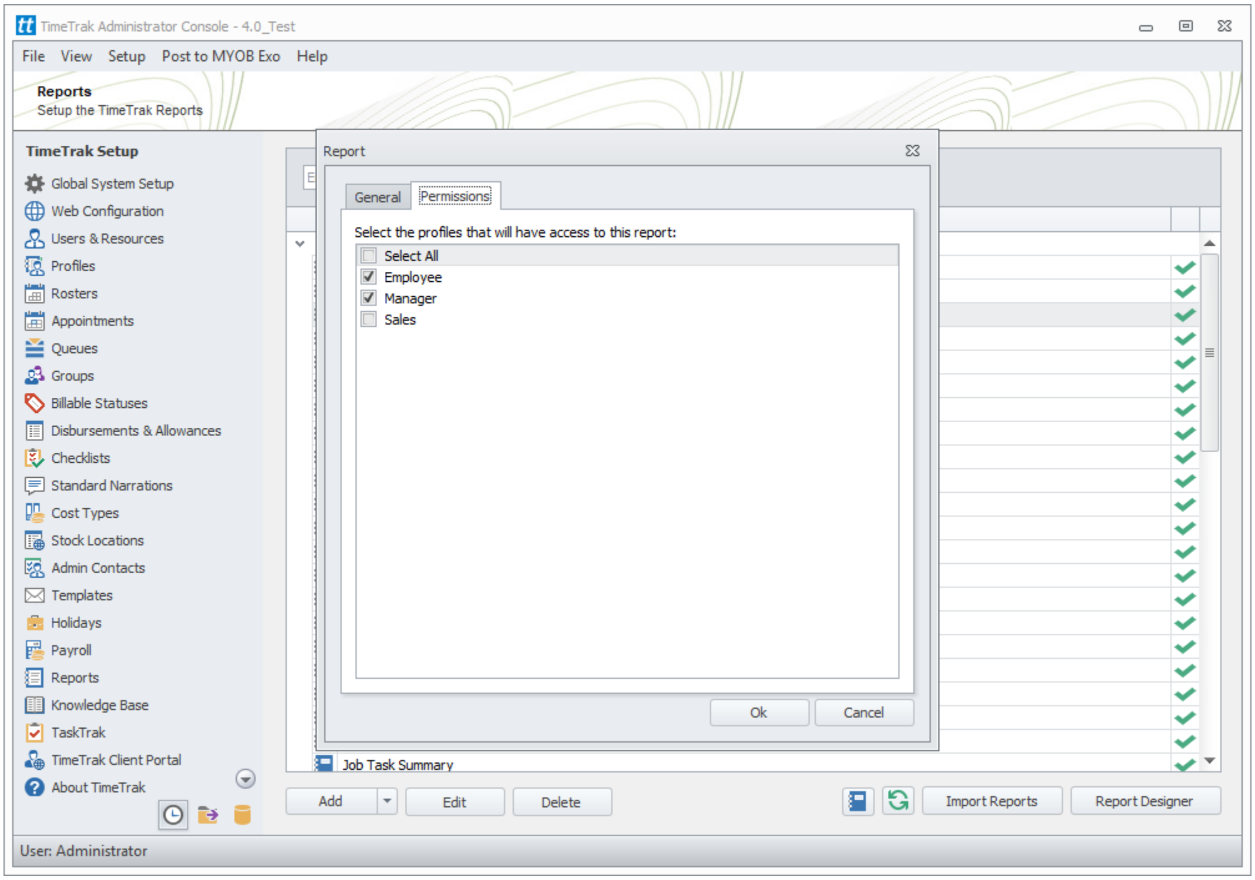
Tick on the **Checklist Report** or **Checklist Report_ServiceableUnitsNotEnabled**

Note: If the database does not have Serviceable Units enabled, ensure the Checklist Report_ServiceableUnitsNotEnabled is imported and used otherwise there will be errors upon saving the checklist due to the database table/ views not being available.

Set the **Category** to **General** and click **OK** to import it.



Return to the Reports main screen and double click on the new Checklist Report to edit the **General** settings and **Permissions** tabs.



If updating the checklist with a client's logo or other data, it is recommended that the checklist report is saved under a different name to the database and that this copy is used.

Making alterations to the out of the box checklist report without saving it, could cause your changes to be lost if this checklist report is updated. On logging into the Admin Console users will be prompted to update any out of the box reports that have been updated.

Types of Checklists

There are two types of Checklists; a Standard Checklist and a Partial Checklist.

A Standard Checklist is a full Checklist and has all of the options of having a report assigned against it.

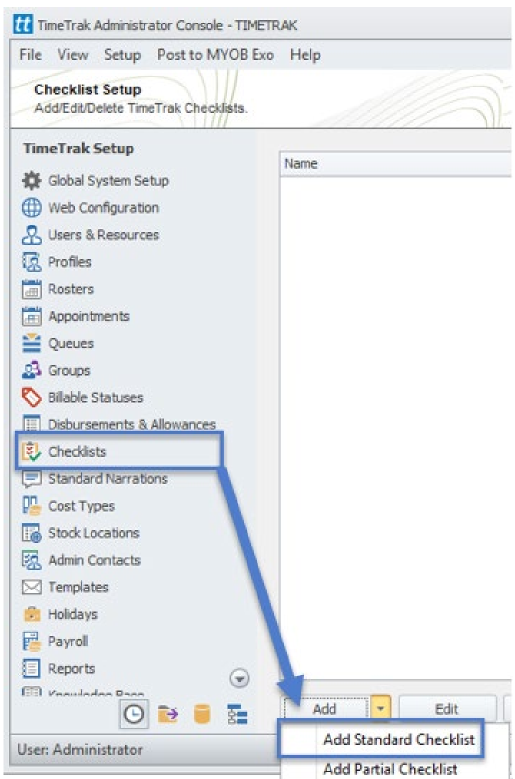
A Partial Checklist cannot have a report assigned against it, but once it is created it can be used more than once, in more than one checklist. An excellent example of a Partial checklist is having one for client and technician sign off and adding it into the bottom of every Standard Checklist.

Setting up a Checklist

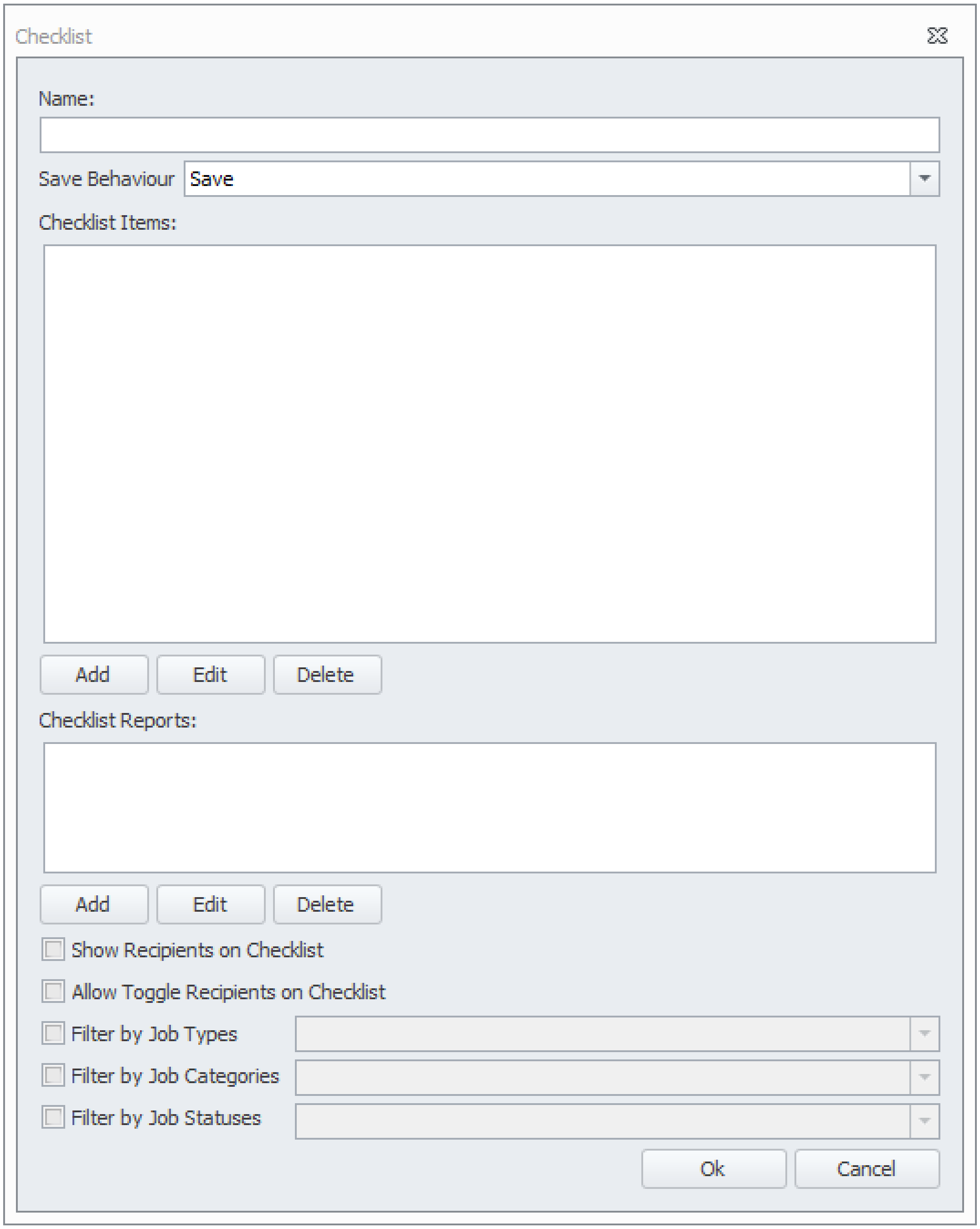
Log into the **Admin Console**

Click on the **Checklists** menu item

Click on **Add** and select **Add Standard Checklist**



The new Checklist screen will come up – there is an additional set up that has to be done for every Standard Checklist, for example, there must be a Checklist Report set up otherwise the Checklist will not able to be saved. Refer to Setting up a Checklist Report for this set up.

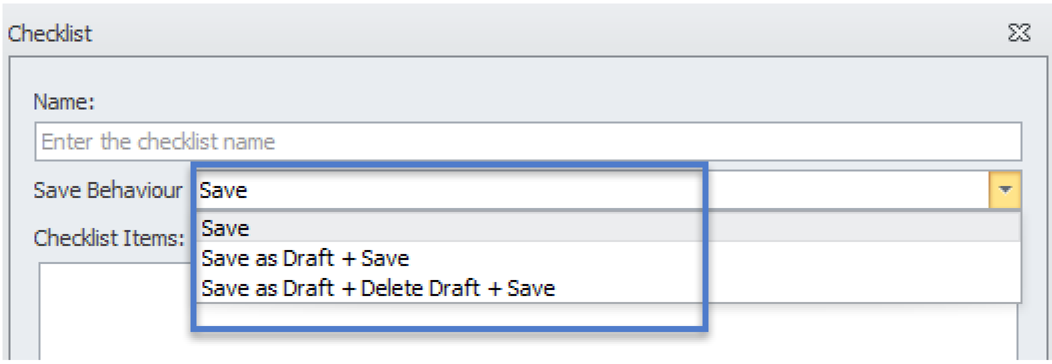


Give the Checklist a meaningful **Name**, this will be displayed on the websites.

Choose the **Save Behaviour**.

- Save – this will save and email the Checklist straight away
- Save as Draft + Save – this will allow the user to Save the Checklist in a draft and once it is completed, they can save and email the Checklist. This behaviour is very useful if the checklist is used by multiple users so they don't have to fill the same checklist for one job.

- Save Draft + Delete Draft + Save – this allows the user to Save the Checklist in a draft and delete the Draft if it is not to be sent, then save and email the Checklist.

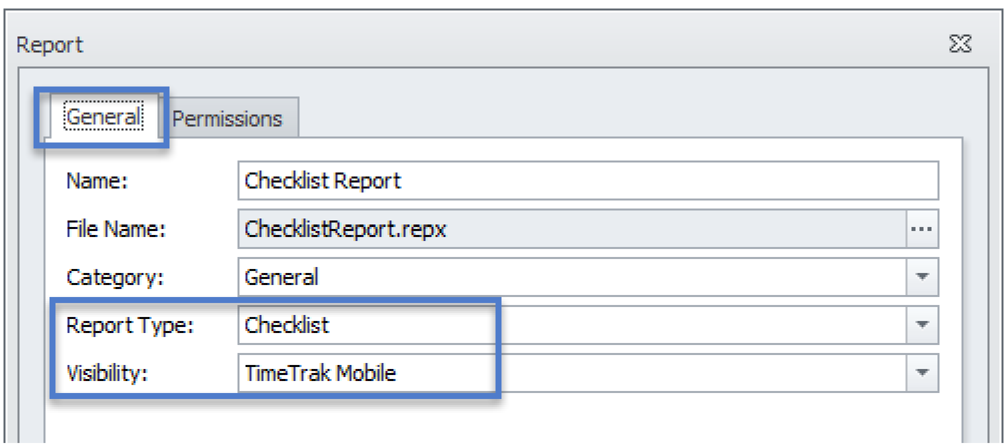


Add in at least one Checklist Item.

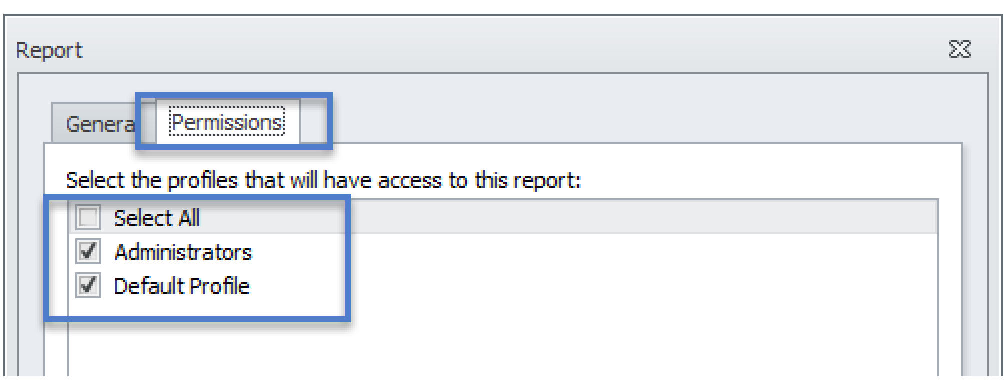
Select the Checklist Report.

Set the **Report Type** to Checklist.

If you want the report visible for a Mobile user, you need to update the **Visibility** to TimeTrak Mobile in report setting. Go to **Checklist Report** in Report, right click and choose edit.



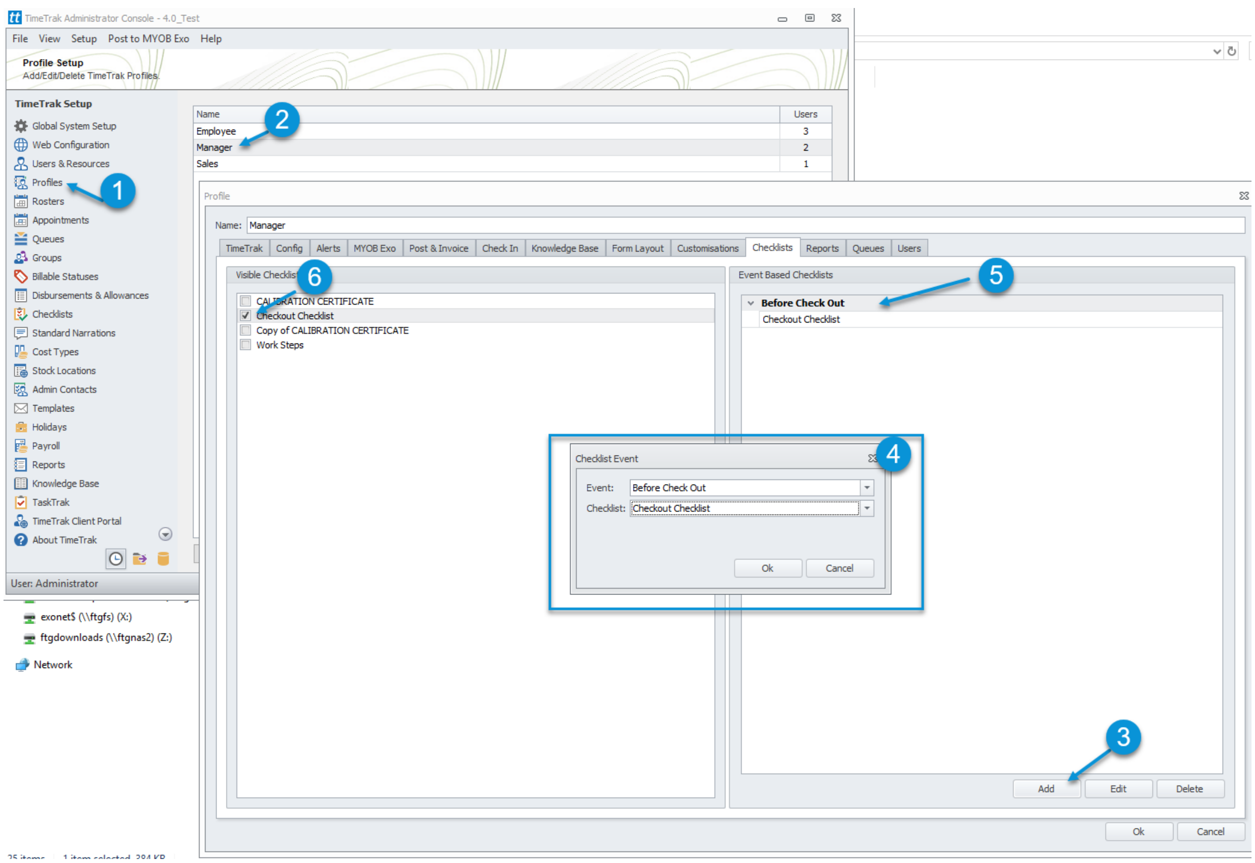
In the **Permissions** tab tick on the profiles who can see the Checklist Report or Select All.



When a Checklist Report is allocated to a Checklist, there are settings about the report that need to be considered.

- Category - Set the Category to Checklists
- Template - If there is a custom email template then it can be selected here, if nothing is selected it will use the default email template.

Click **OK** to save the Checklist.

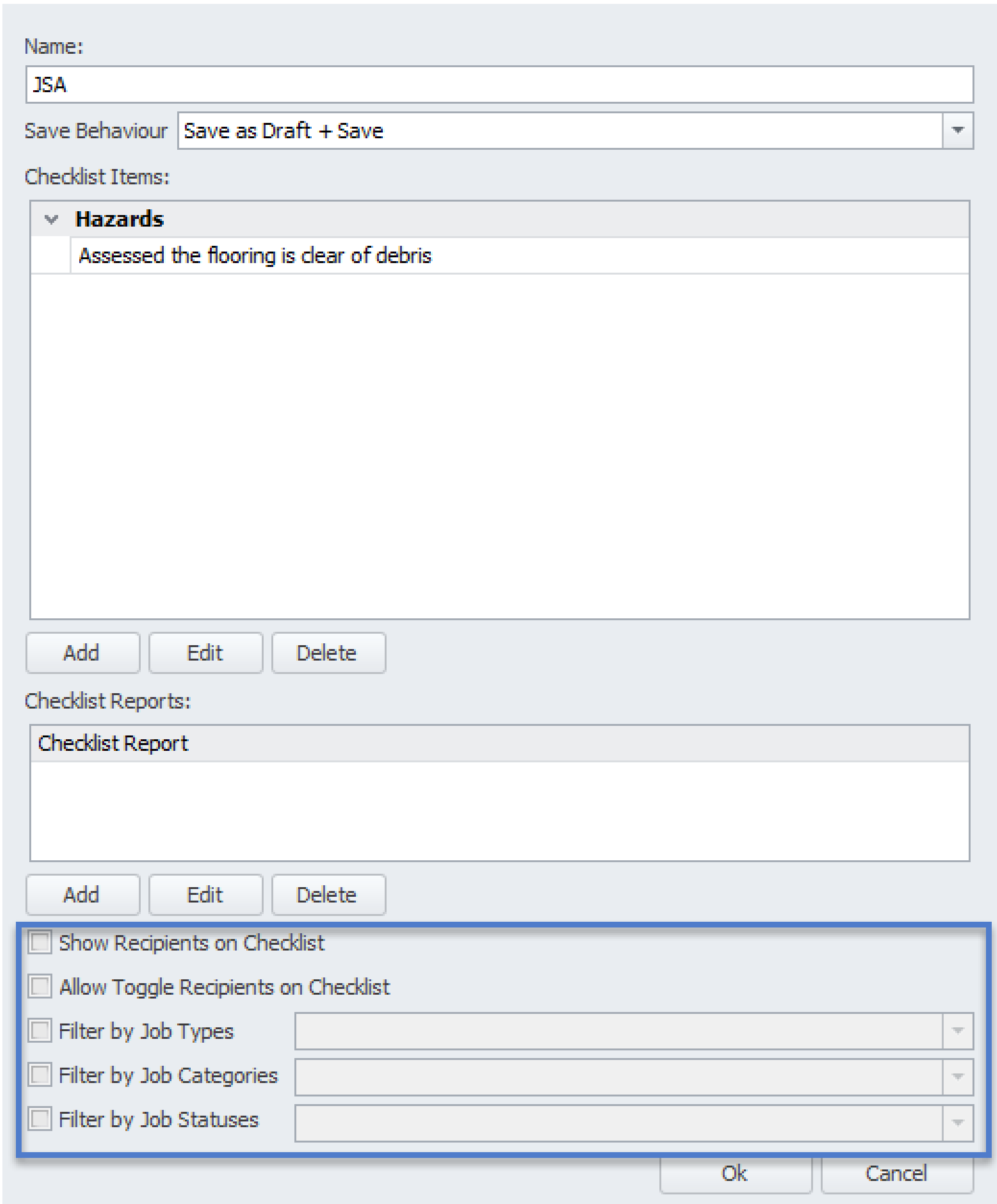


Ensure to Enable the Checklist against a Profile. Open the profile(s) you want to enable the checklist against, and go to checklist tab. In here, you will find all the standard checklists that are available in the database.

If an Event Based Checklist is required, click Add on bottom right corner and choose an event when the checklist will be prompted.

Extra Options on Checklists

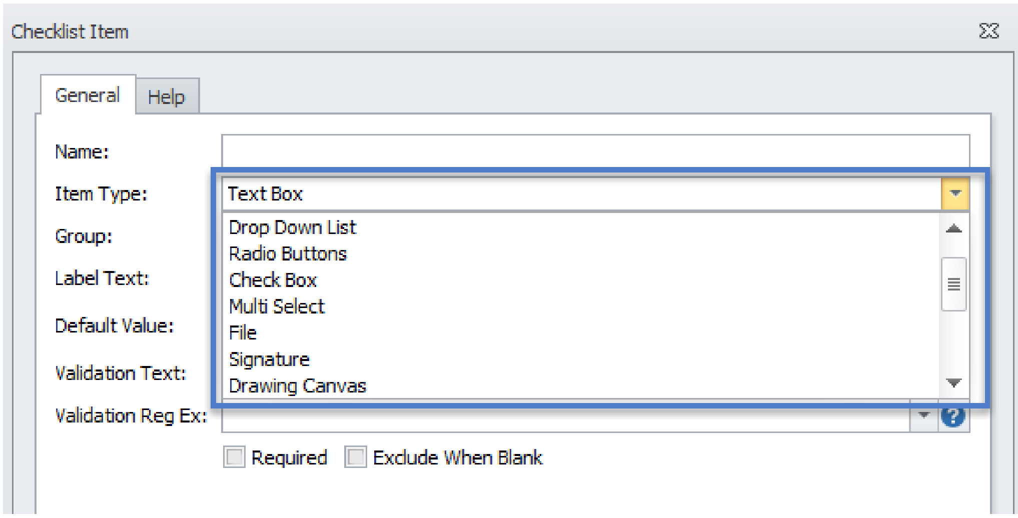
There is the ability to choose who receives the PDF in an email and to filter which jobs the Checklist will display against.



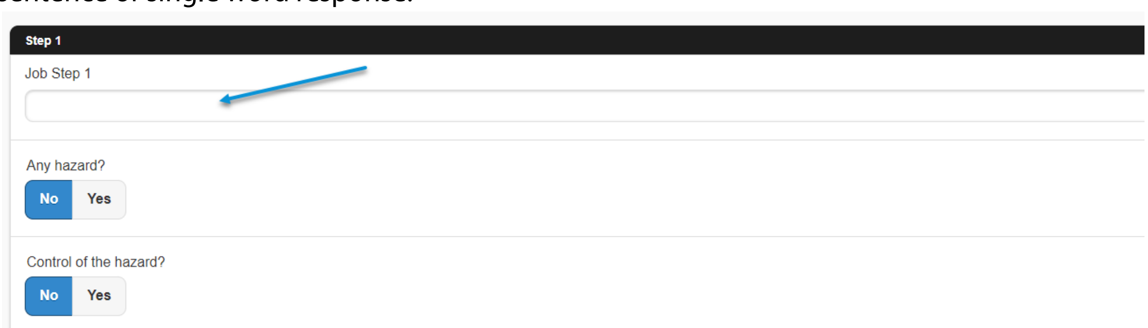
- Show Recipients on Checklist – This will list all of the users' email addresses, which are ticked on or manually entered at the Checklist Report level.
- Allow Toggle Recipients on Checklist – This will allow the Mobile user to tick users on and off when the Checklist is being emailed on completion.

- Filter by Job Types – Select one or more job types the checklist is visible for. This setting is very useful if particular checklists only apply to certain job types and not others.
- Filter by Job Categories – Select one or more job categories the checklist is visible for. This setting is very useful if particular checklists only apply to certain job categories and not others.
- Filter by Job Statuses – Select one or more job statuses the checklist is visible for. This setting is very useful if particular checklists only apply to certain job statuses and not others.

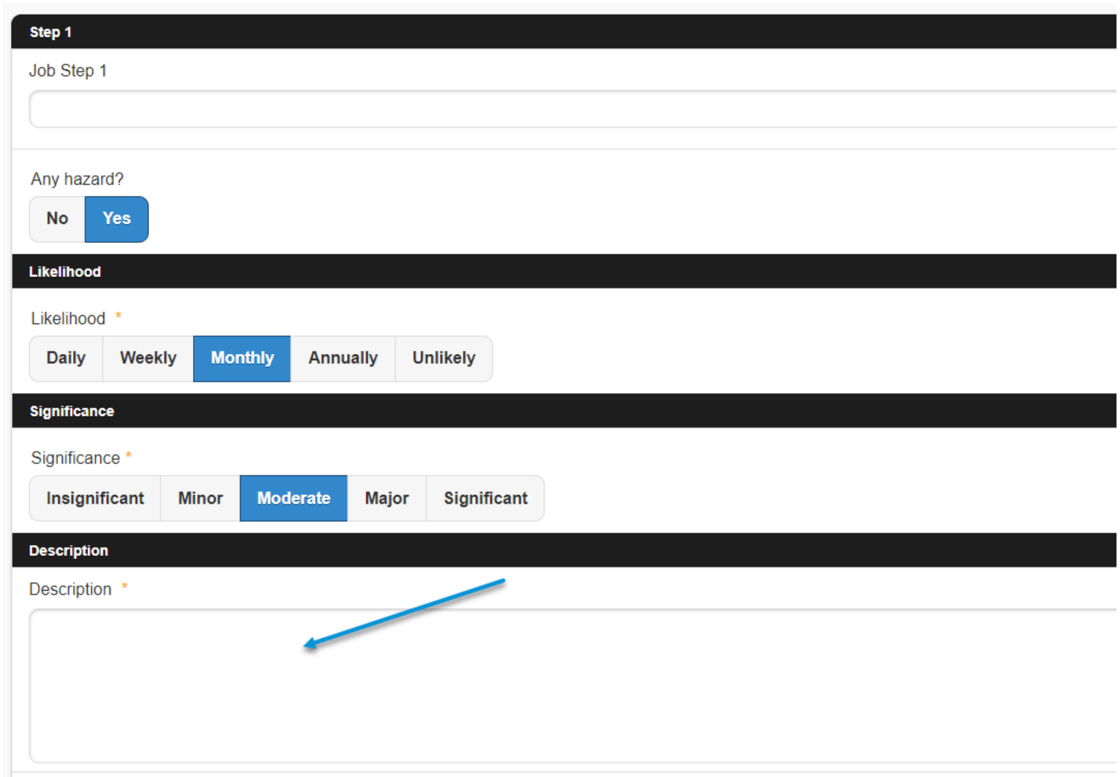
Checklist Items



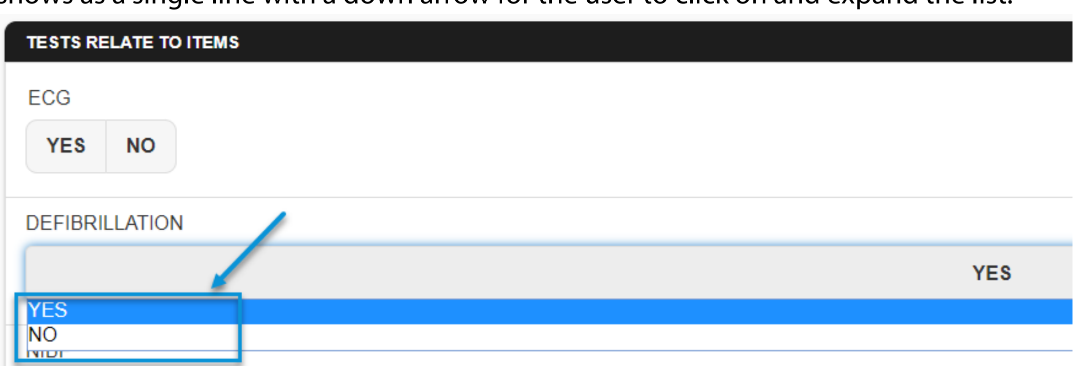
- Text Box – The text box shows as a single line in the Checklist and users add in a small sentence or single word response.



- Memo Box – This is a larger box for text and usually contains long explanations.

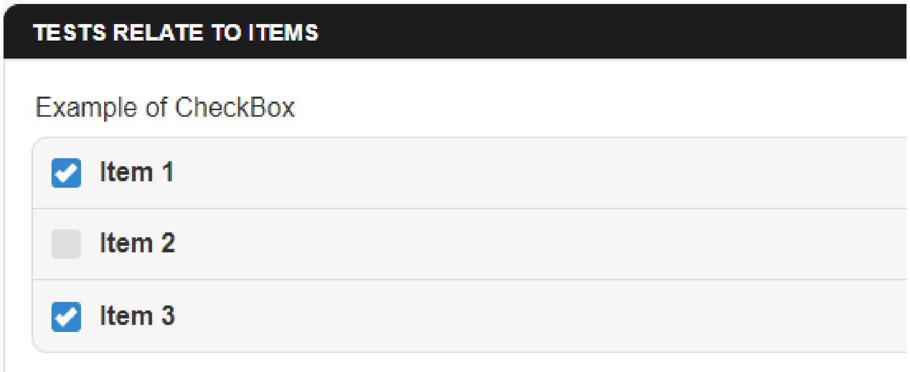


- Drop Down List – This has the option of being a SQL query that allows users to select one item from a drop down list or a manually entered list, which can be linked to a Partial Checklist. This shows as a single line with a down arrow for the user to click on and expand the list.

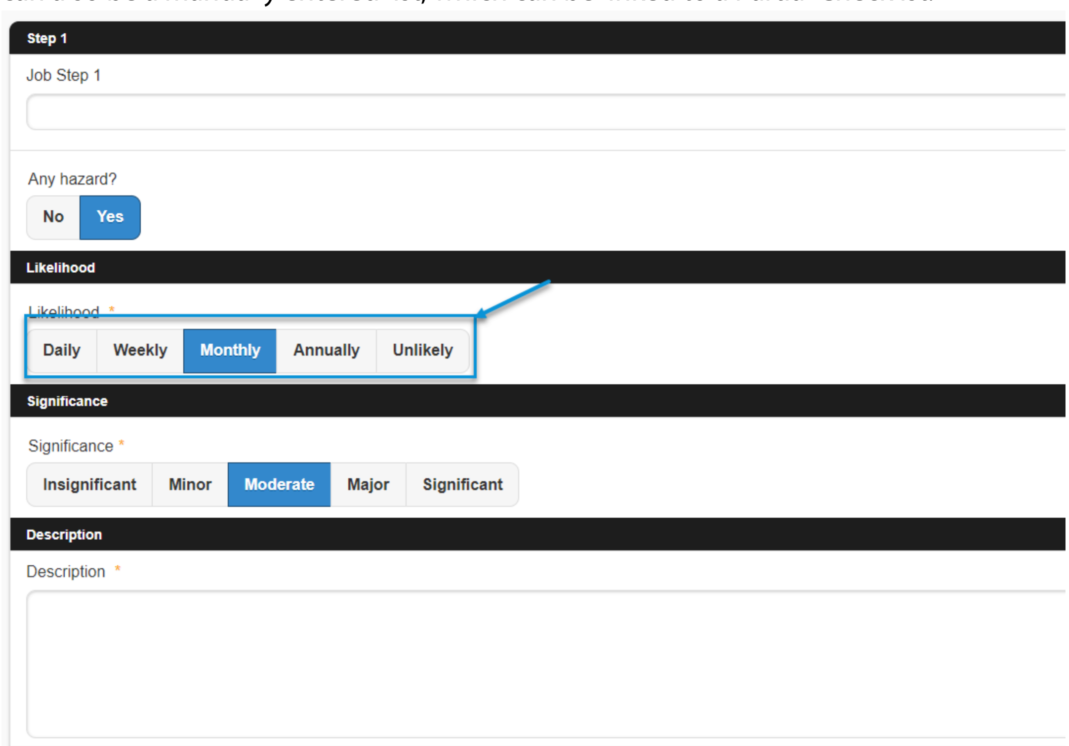


- Radio Buttons – These show as a button with text in it and they can be built on a SQL query that allows the user to select a single item or it can be a manually entered list, which can be linked to a Partial Checklist.

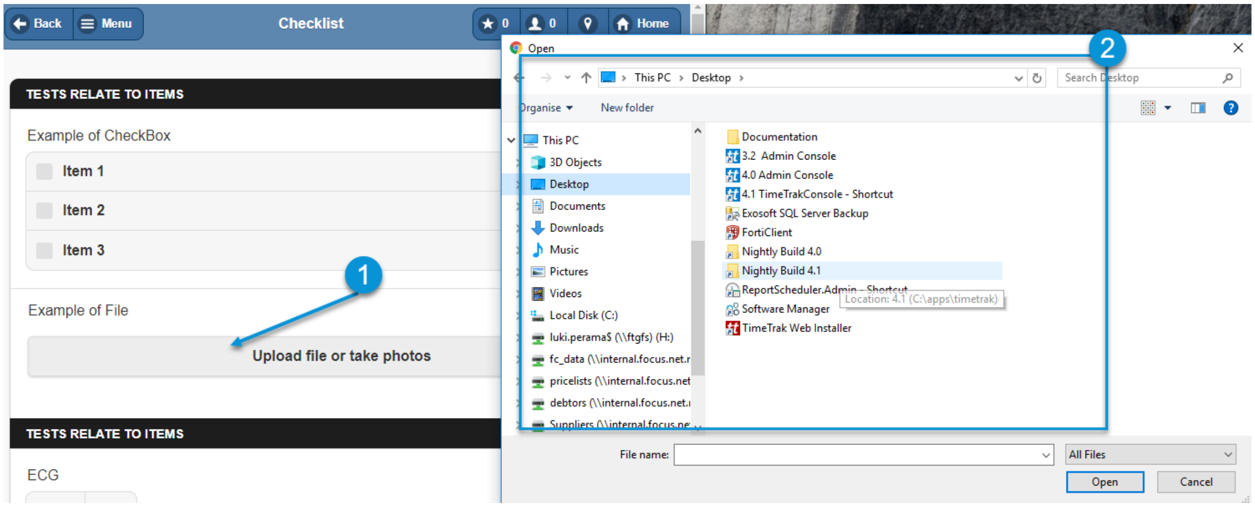
- Check Box – this is a Boolean behind the scenes and is looking for a 0 or 1 answer. The options of data could be Y and N or Yes and No, 0 and 1. This displays as a tick box in the Checklist.



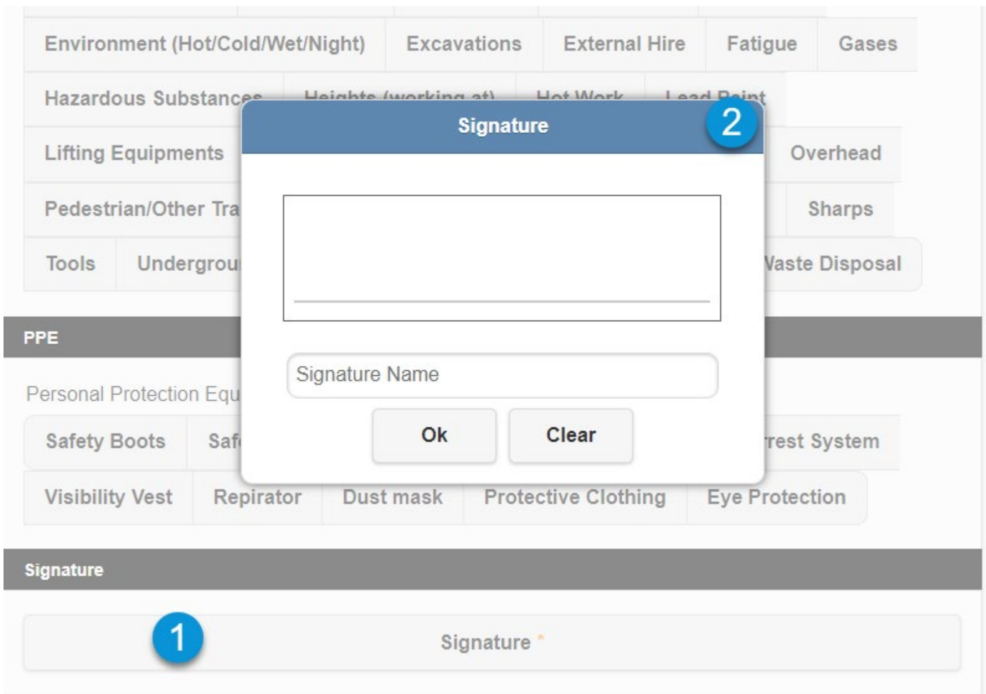
- Multi Select – this is a row of buttons with text in them and more than one can be selected. They can be a SQL query that allows the user to select either a single item or multiple items. It can also be a manually entered list, which can be linked to a Partial Checklist.



- File – this is a browse option in the Checklist that allows the user to search the devices local storage for a file or photo, alternatively they could take a photo and upload that.

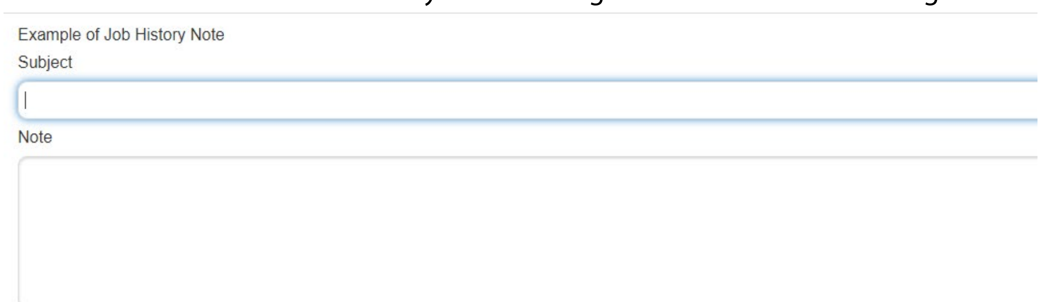


- Signature – A signature displays as a pop up box with a blank space to capture a signature and a name field.

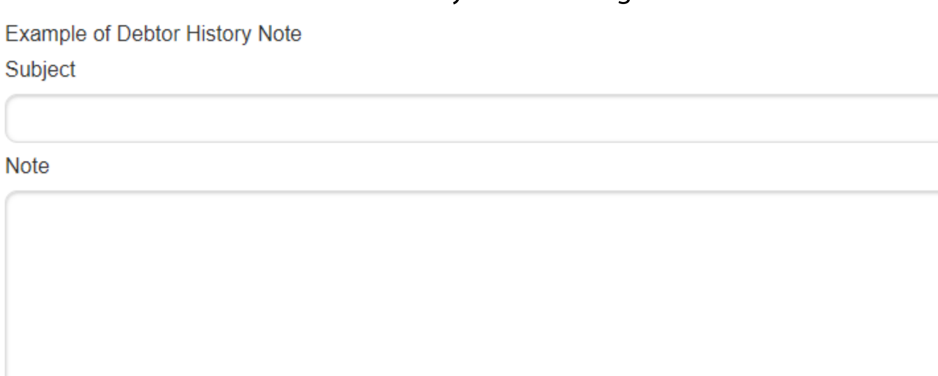


- Drawing Canvas – this displays in a checklist as a button and when clicked on it opens up a screen, which is large enough for the user to draw a picture on. From the Drawing Canvas the user can also upload a photo into it (like the file) but it has the added functionality of being able to write or draw over the photo. Excellent example of this is taking a photo of a site hazard and highlighting it before saving the image.

- Job History Note – This displays in the Checklist like the Memo Box – where a note can be added. This will create a Job History Note back against the Job in Job Costing.

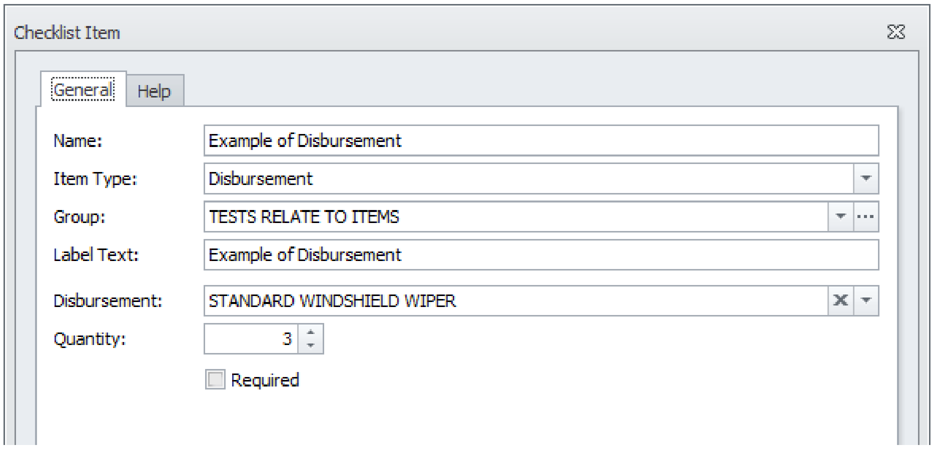


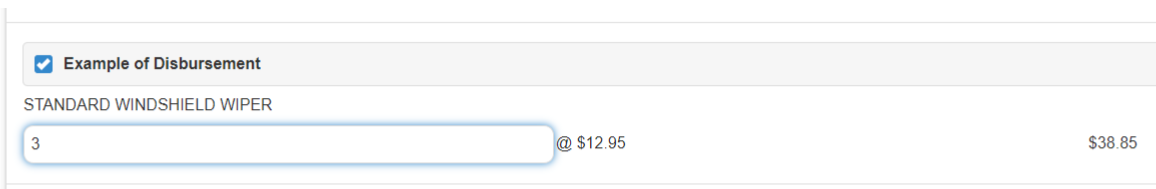
- Debtor History Note – This displays in the Checklist like the Memo Box – where a note can be added. This will create a Debtor History Note back against the Debtor in MYOB Exo.



- Disbursement – this will show as a line with the Stockcode visible and its sellprice. If a user adds a disbursement in a Checklist this will assign the Stock to the Job the Checklist is related

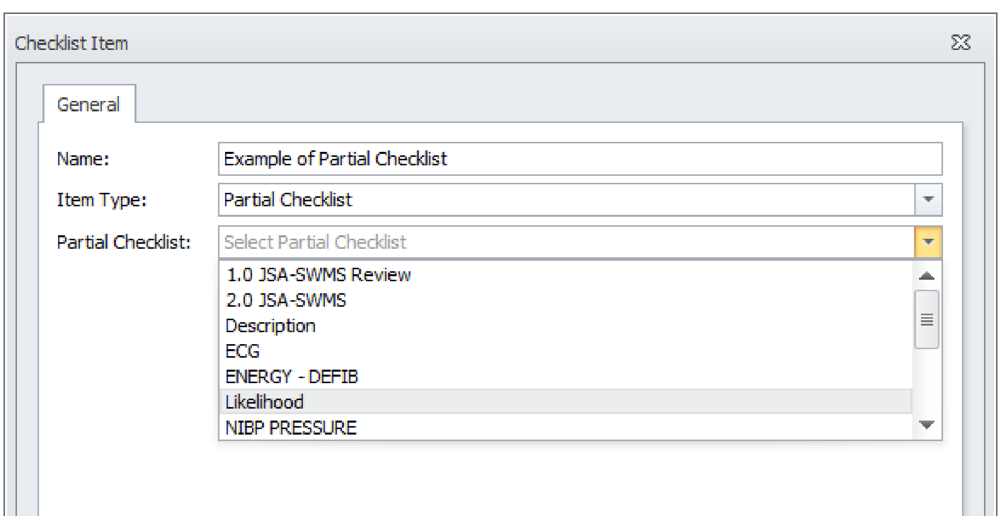
to, and remove it from the stock count. The number and item you put in the checklist will be shown the same in TimeTrak Mobile while the quantity can be edited, the item can't.
Note: to add more items, you need to create another checklist item for every disbursement that is needed for the job.





- Serviceable Unit – this will show the Serviceable Unit's name in a drop down list and the user can select one from any that are currently assigned to the Job from which the Checklist is being run against.

- Partial Checklist – When you created a partial checklist, you can also put it on the body of the main checklist. It makes it easier when creating new checklist, you don't need to recreate part of checklist as you can put an existing partial checklist.



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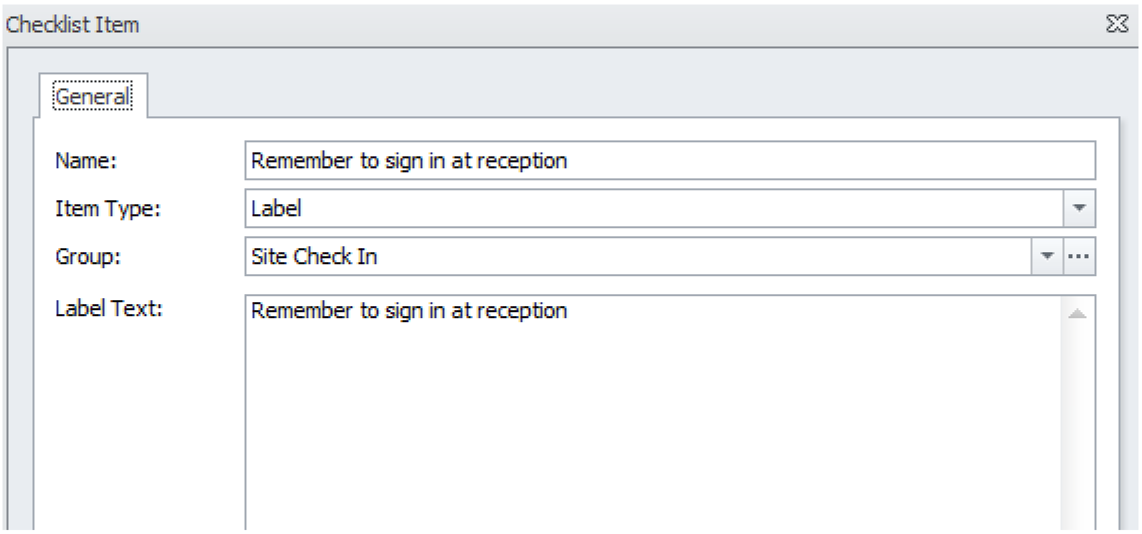
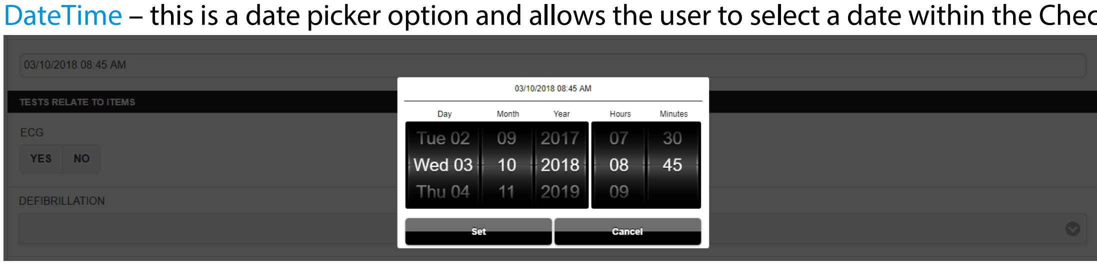
- Label – The checklist item label, can be put in a checklist to display information to the end user as per below example:
 What is entered in “label text” will display on the checklist as well as the report that the checklist generates.



- DateTime – this is a date picker option and allows the user to select a date within the Checklist.

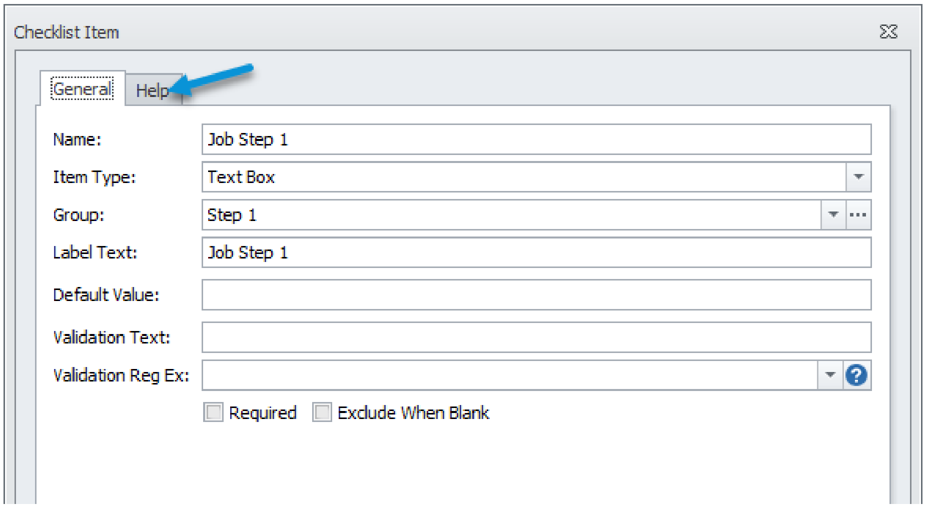


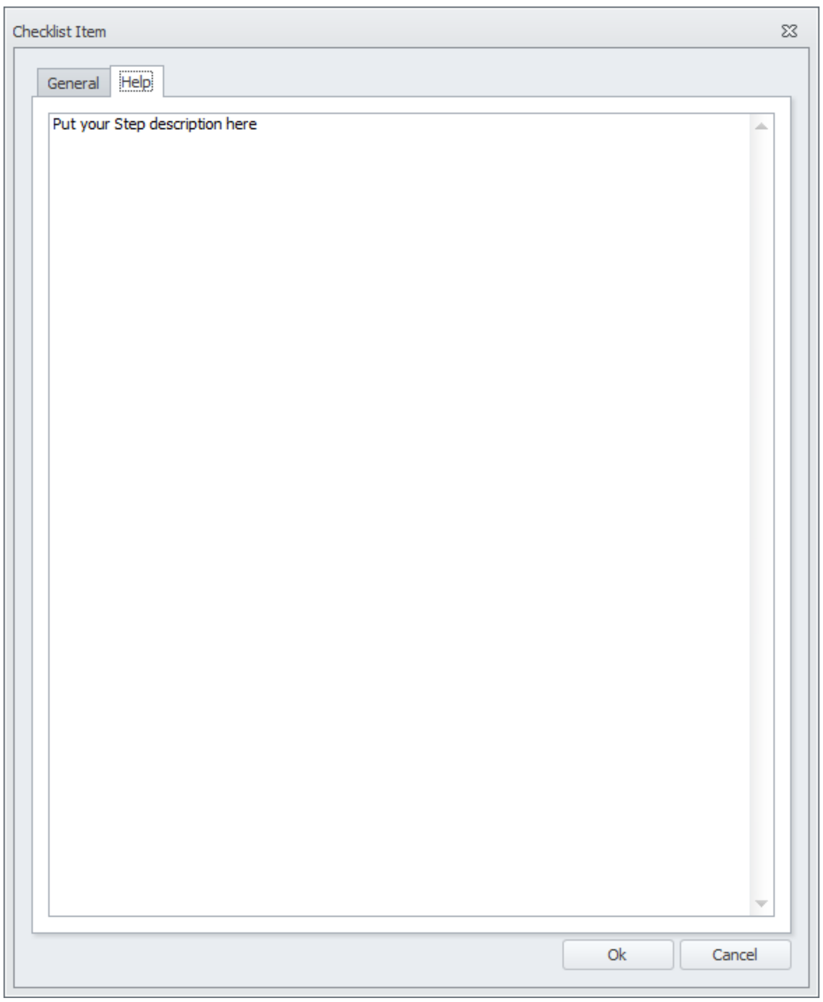
Checklist Item Options

Against all checklist items, there are some general fields that are required or have the ability to provide end users with additional information.

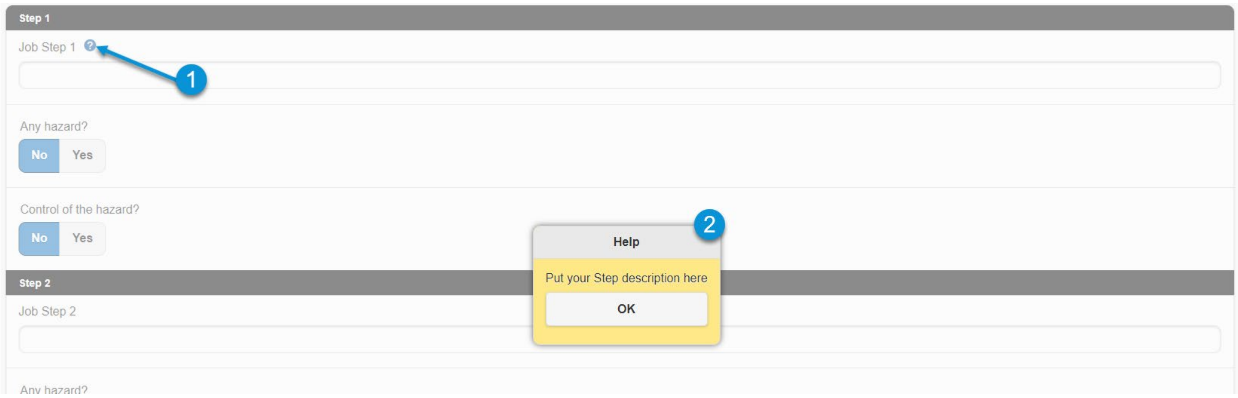
Help

In help, you can put information or a prompt against the checklist item to help explain what is required to assist end users.



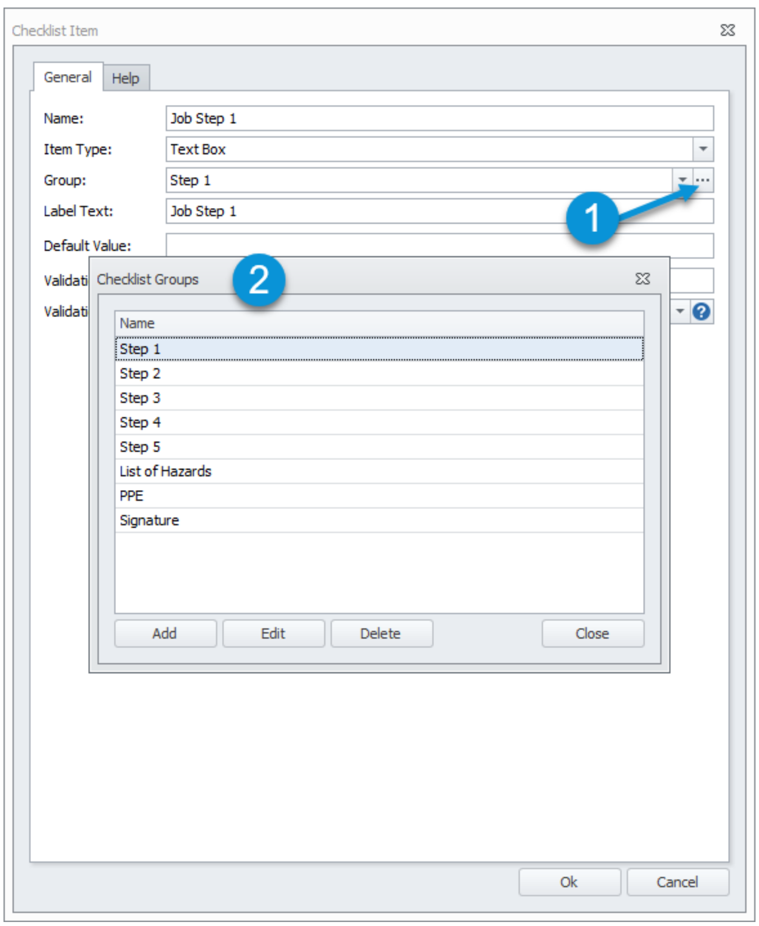


When information is populated in the help field, a question mark icon next to the checklist item is available in TimeTrak Mobile to end users as per below:

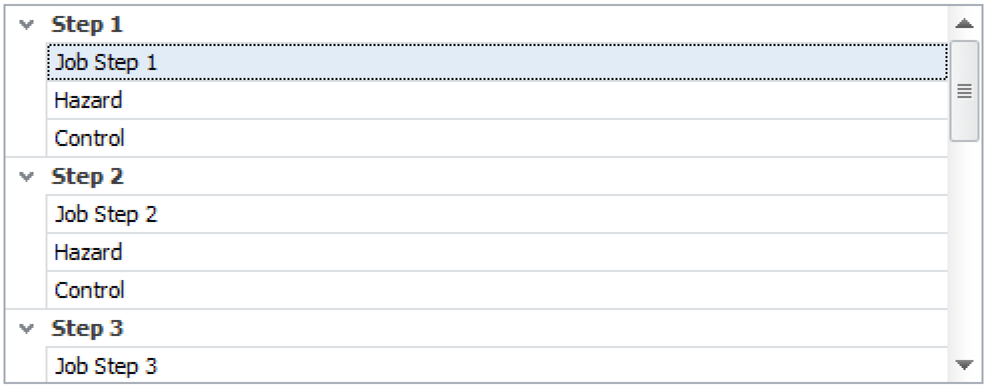


Checklist groups

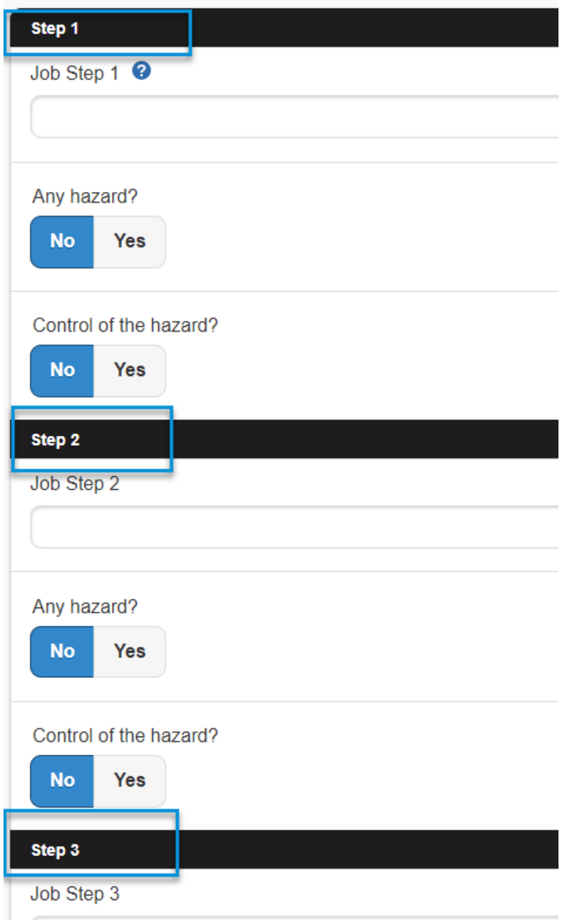
A Checklist group is to group Checklists items together and make Checklists easier to navigate and complete.



Every checklist item needs be assigned to a Checklist group:



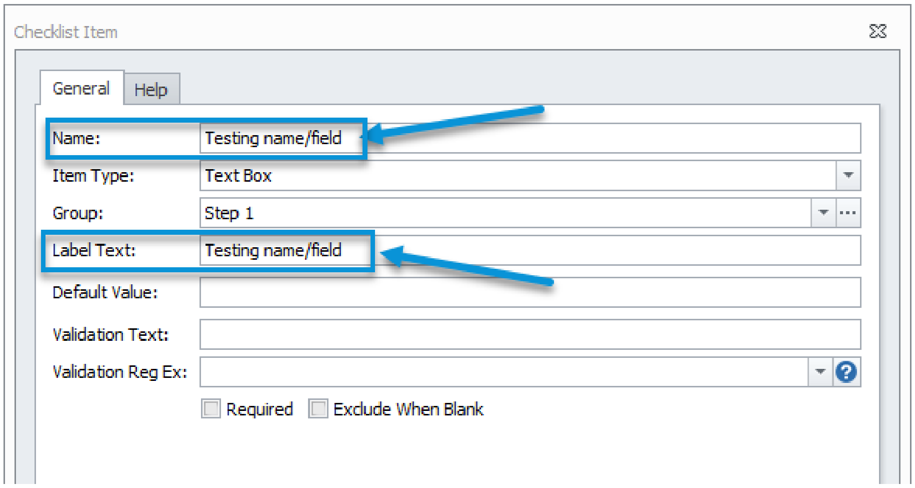
In TimeTrak Mobile, the Checklist groups display as a black bar as per below:



Checklists groups display as headings on the out of the box Checklist reports also.

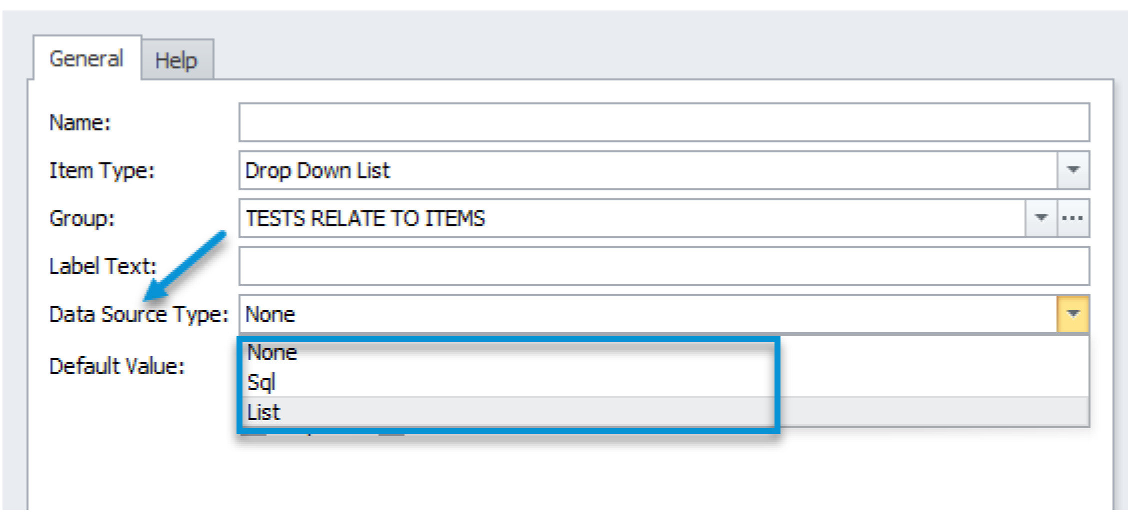
Name/label text

The name field is to identify the item in the Admin Console against the checklist. This information won't be seen in the Checklist in Mobile or the report that is generated. On entering text into this field the label text fields are automatically copied (as these are usually very similar).



Data Source Type

When you choose the Checklist item type: Dropdown list, Radio Button, Checkbox, or Multi Select, you will find an option for data source. This is how the data for the item is produced. There is the option to populate this information manually via a list, or from the database via a SQL query.



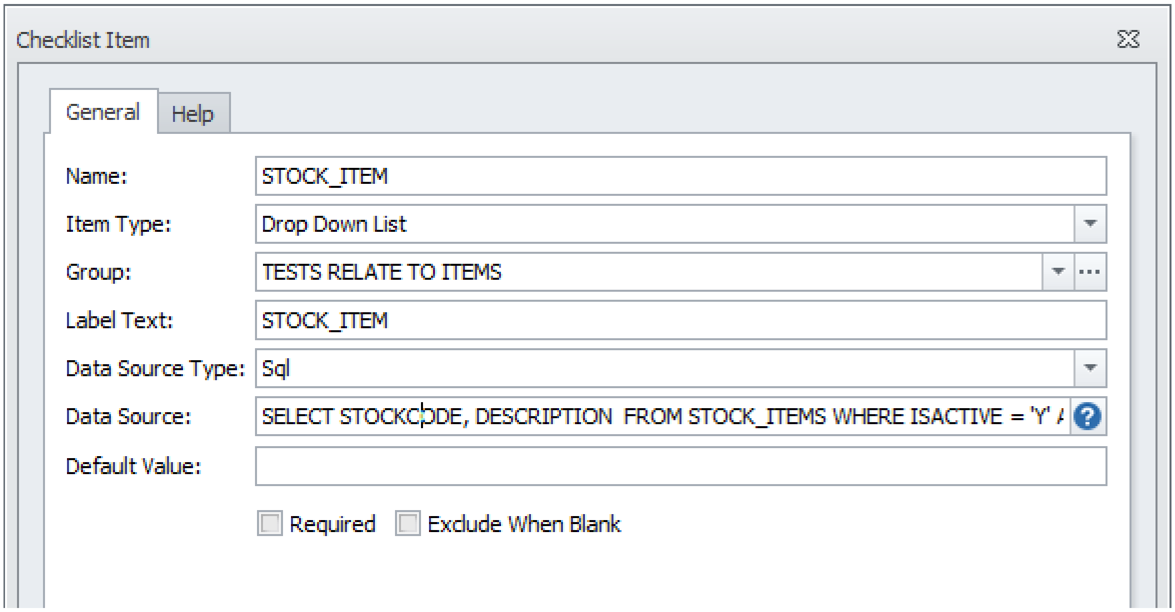
SQL

With this data type, you must provide a SQL query where the first column is the value and the second column is the name (value that will be displayed in the Checklist).

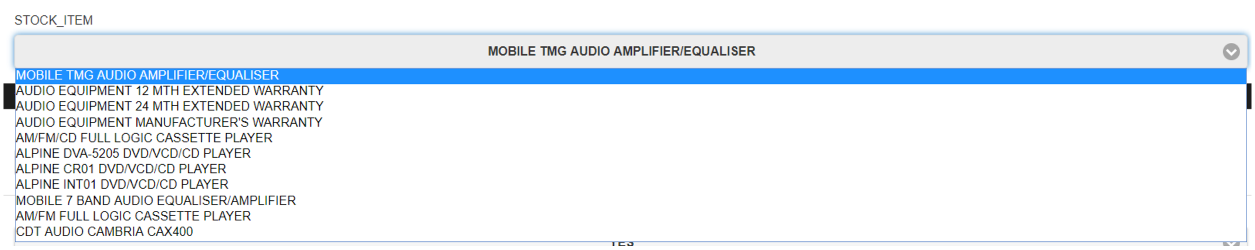
For more information on the criteria of this SQL query, you can hover over the question mark.

A basic working example of this is if we need to list stock items that meet a certain stock group.

In the below example, we can populate the "STOCK_ITEM" Checklist item with the query: **"SELECT STOCKCODE, DESCRIPTION FROM STOCK_ITEMS WHERE ISACTIVE = 'Y' AND STOCKGROUP = 14"**



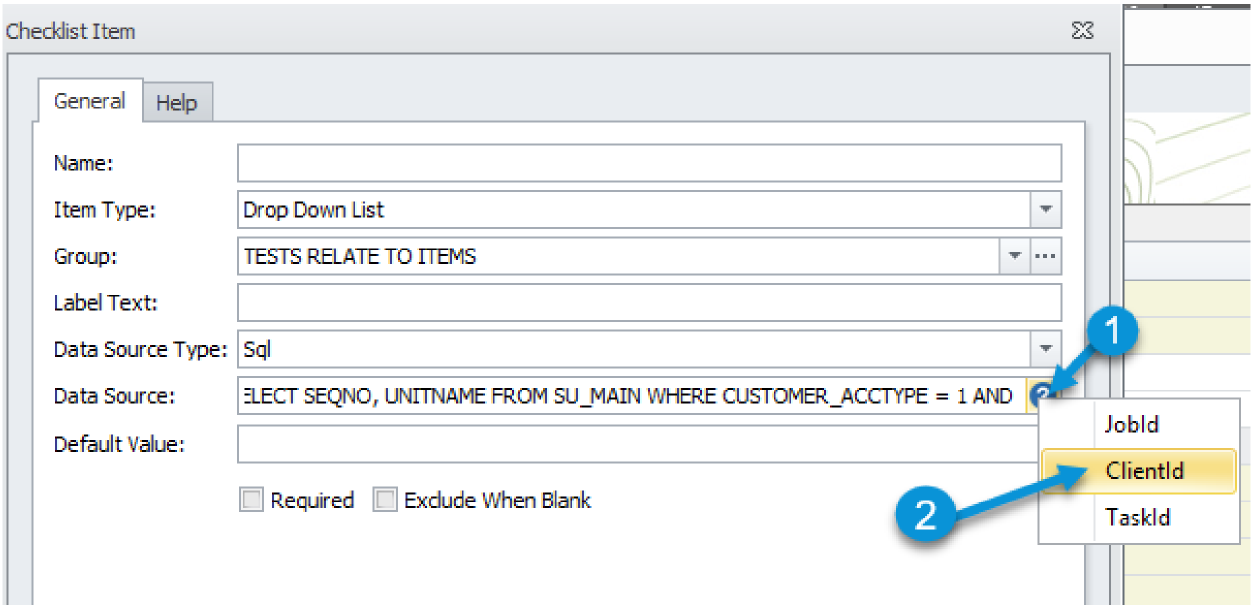
This will grab all the data from the database that matches the criteria.



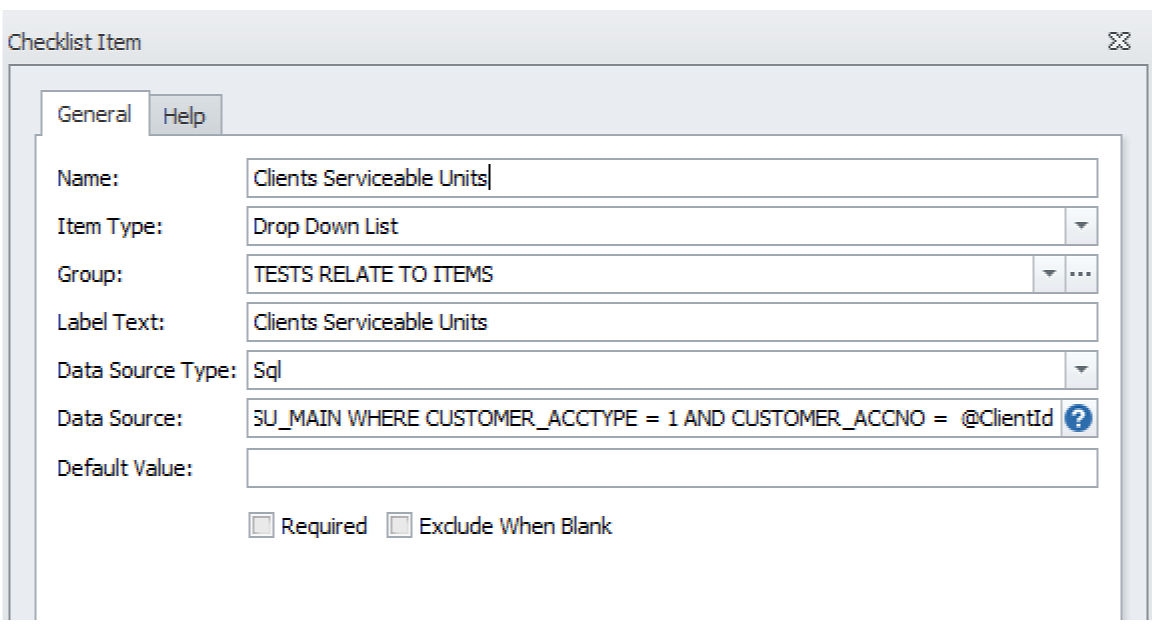
Please note: No stock transaction will occur this is just a basic example of passing a SQL query into a Checklist item.

You can also can pass the parameters JobId, ClientId, or TaskId into the query.

To do this, click the question mark then the required parameter from the list as per below:

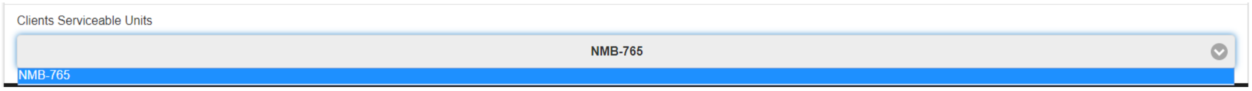


A working example of this is if you want to populate a list of Serviceable Units that are assigned to the CLIENT of the job you are working on.



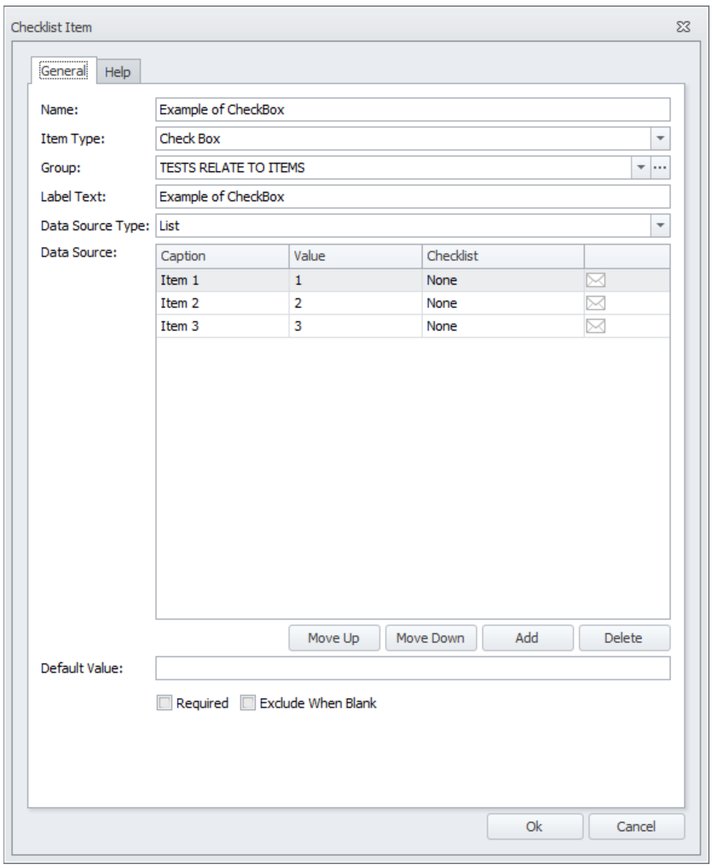
SELECT SEQNO, UNITNAME FROM SU_MAIN WHERE CUSTOMER_ACCTYPE = 1 AND CUSTOMER_ACCNO = @ClientId

This will display the results in the Checklist for the user to select as per below:



List

In this data type, you can create the list manually.



You can click “add” to add items to the list, move up and down to arrange the position, and delete an item.

Caption

In caption, this is the value that you will see in checklist. As the example above, you will see the items in the Checklist of “Example of Checkbox” are “Item 1”, “Item 2”, and “Item 3”

Value

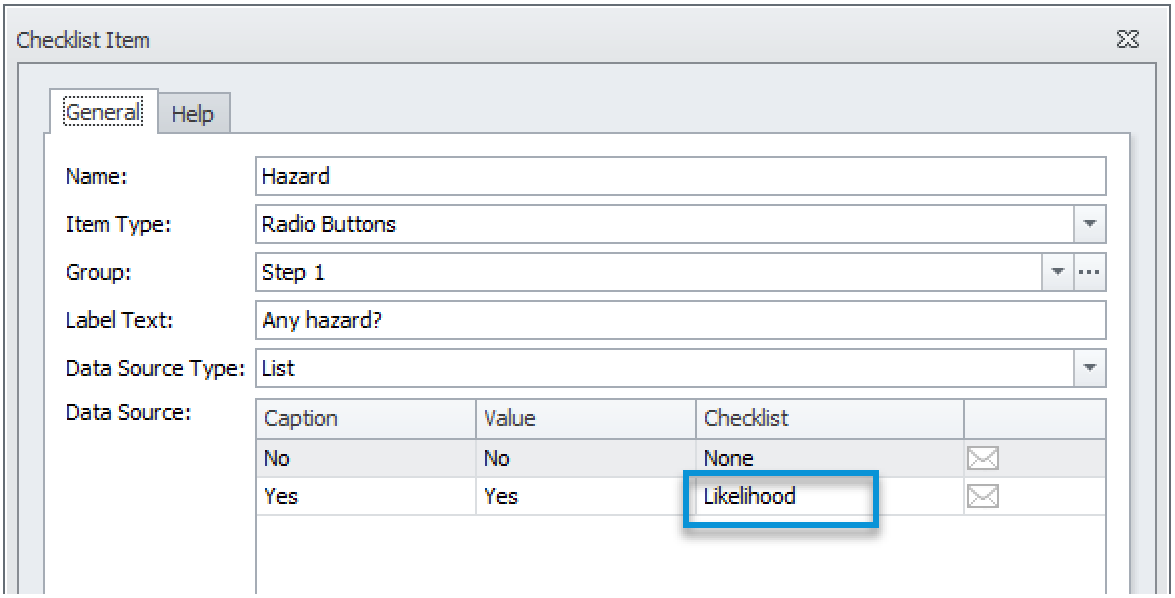
This column could be the same as the caption column but the value in this column is what the database is populated with.

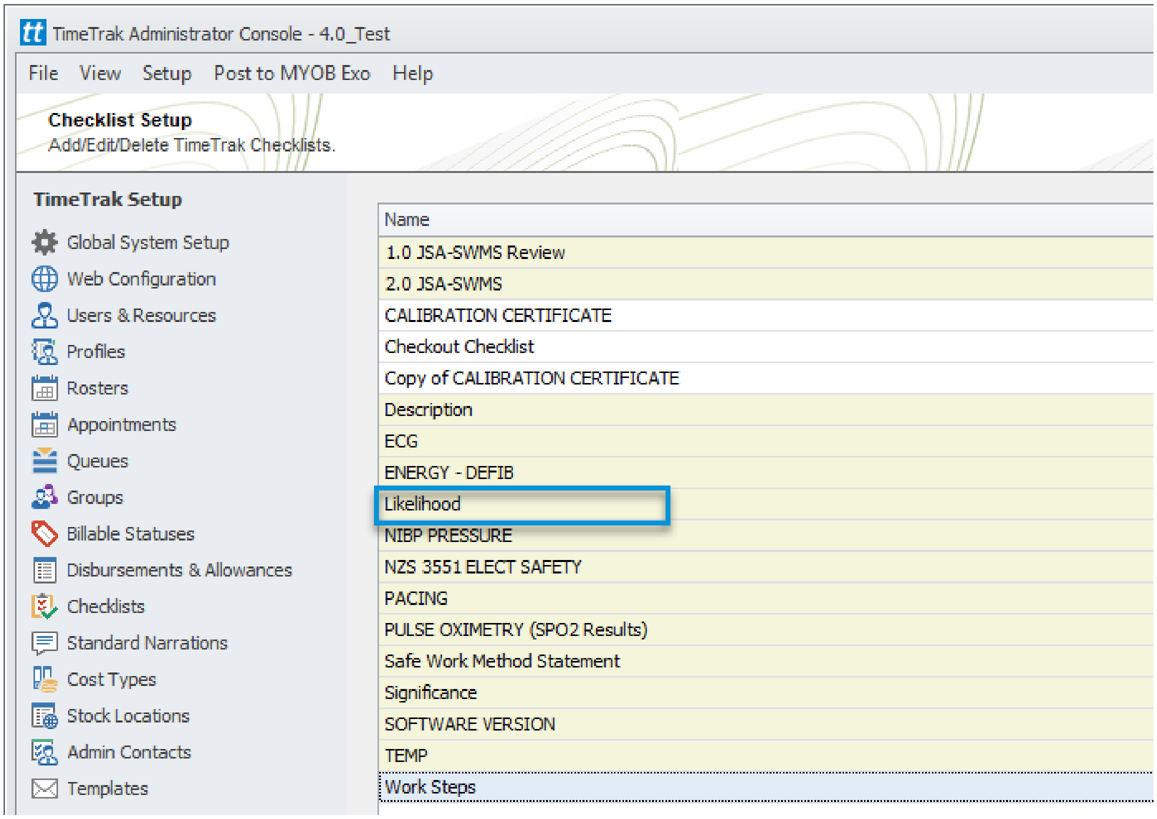
In this example above, for “Item 1”, the value that we will see in the database is “1”.

Checklist

By default, it will set “None” but you can populate the checklist field with a partial Checklist. This means that you can specify a different list of questions based on the answer selected.

In the below example: If the user selects “Yes” to hazard they have to complete the likelihood Partial Checklist, if they select no there is no Partial Checklist assigned so they will move onto the next Checklist item in the Standard Checklist



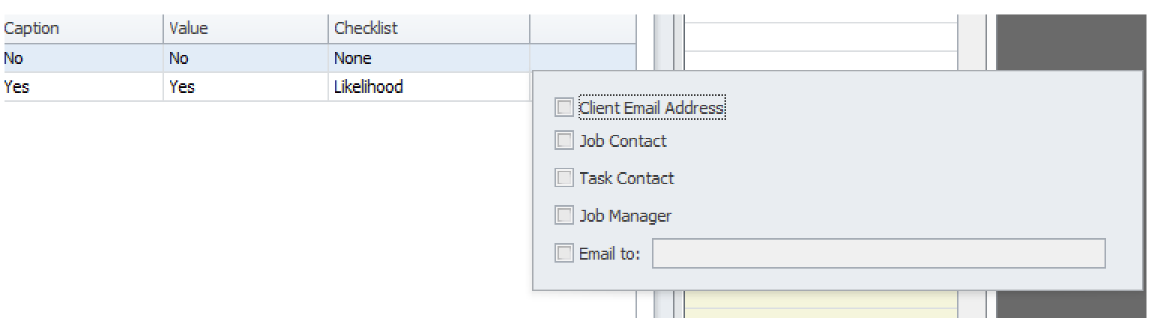


Email

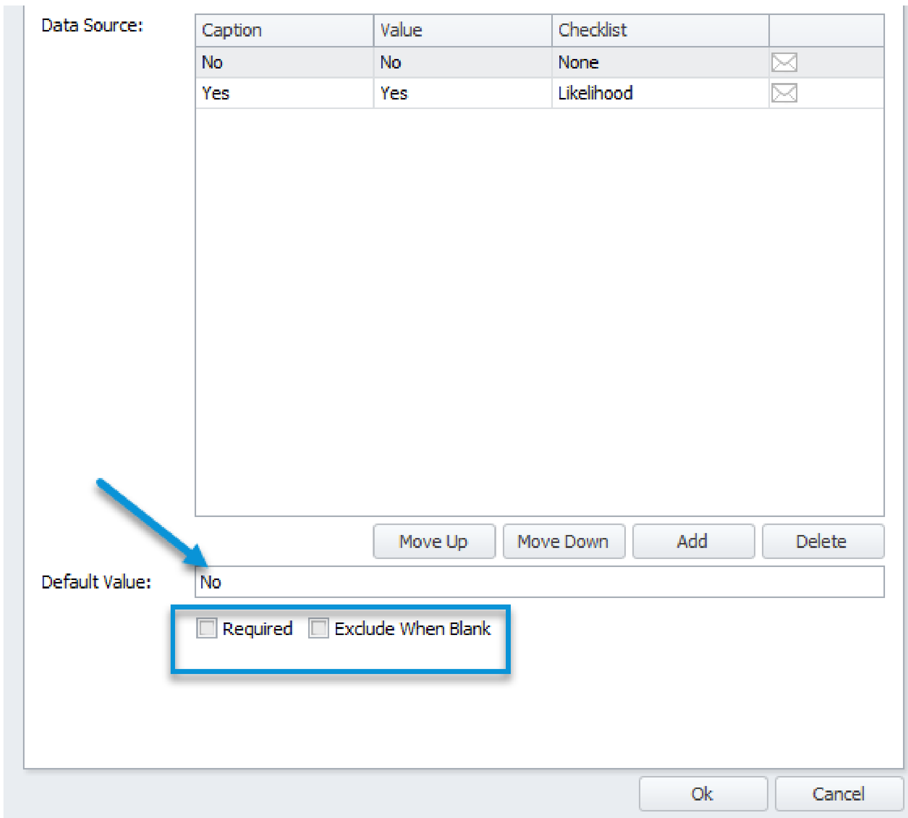
The same email options that are available against a Checklist report are also available against Checklist items. When you click the mail symbol on the far right column, you can specify who you would like the Checklist result emailed to.

A working example of this could be that HR require Checklist results to be emailed to them if users have identified a hazard.

Against the Yes caption of this Checklist item the HR email address could be passed into the "Email to" field which would email them the Checklist results on the occasion that a user answered yes to this question.

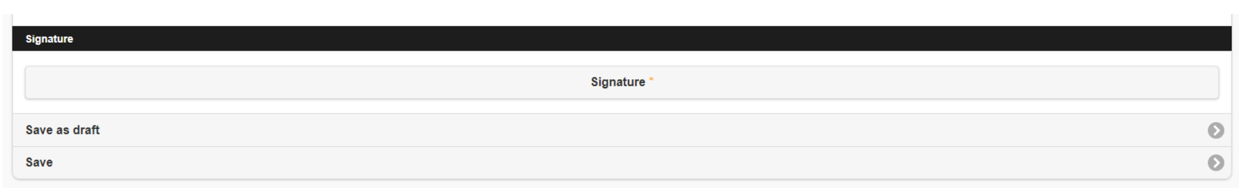


At the bottom, there are default value 'Required' and 'Exclude When Blank' settings.
Default value means that by default the option passed in here will be selected, preventing the Mobile user to select the option in the Checklist (and speeding up the process for them). In the example below, on loading the Checklist "No" will be selected and the user would only be required to change this if that was not the case.



When the "**Required**" option is enabled, the user must complete this Checklist item. The Checklist cannot be submitted until user has completed all required fields.

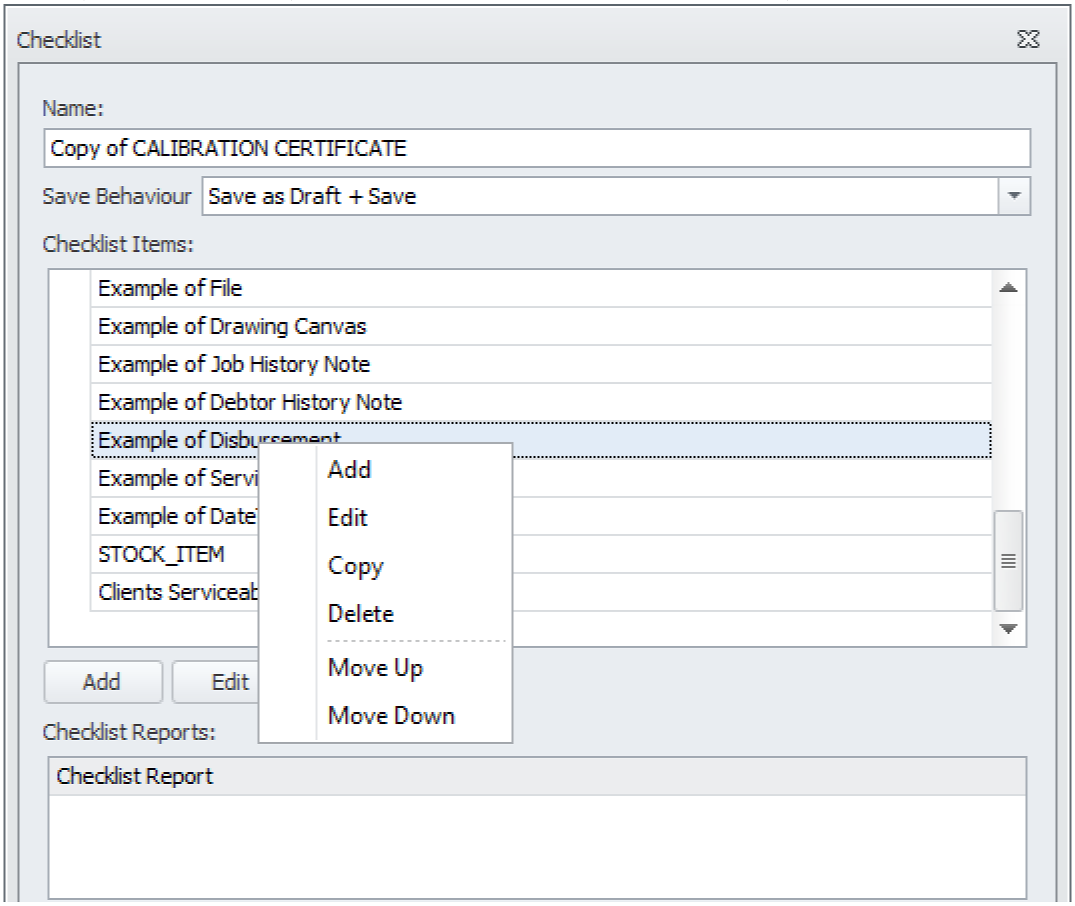
As an example below, "Signature" must be filled (shown with asterisk symbol) before user can save the Checklist.



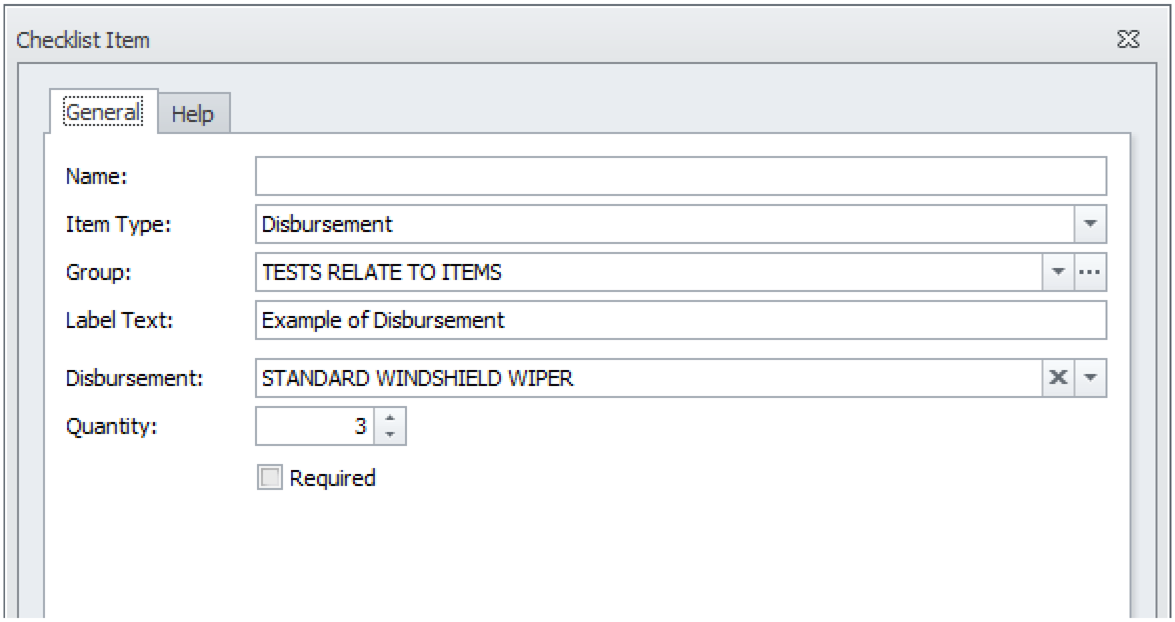
Exclude When Blank If this is enabled and the checklist item is not populated with data, it will be shown as null or empty in the database and will not be shown in the Checklist result report. This is very useful for any Checklist reports that have items such as description or note that are not always populated but display on the report when they don't need to.

Against an existing Checklist item that has been created, you have the ability to copy the item. (This is helpful if creating large checklists to speed up the process).

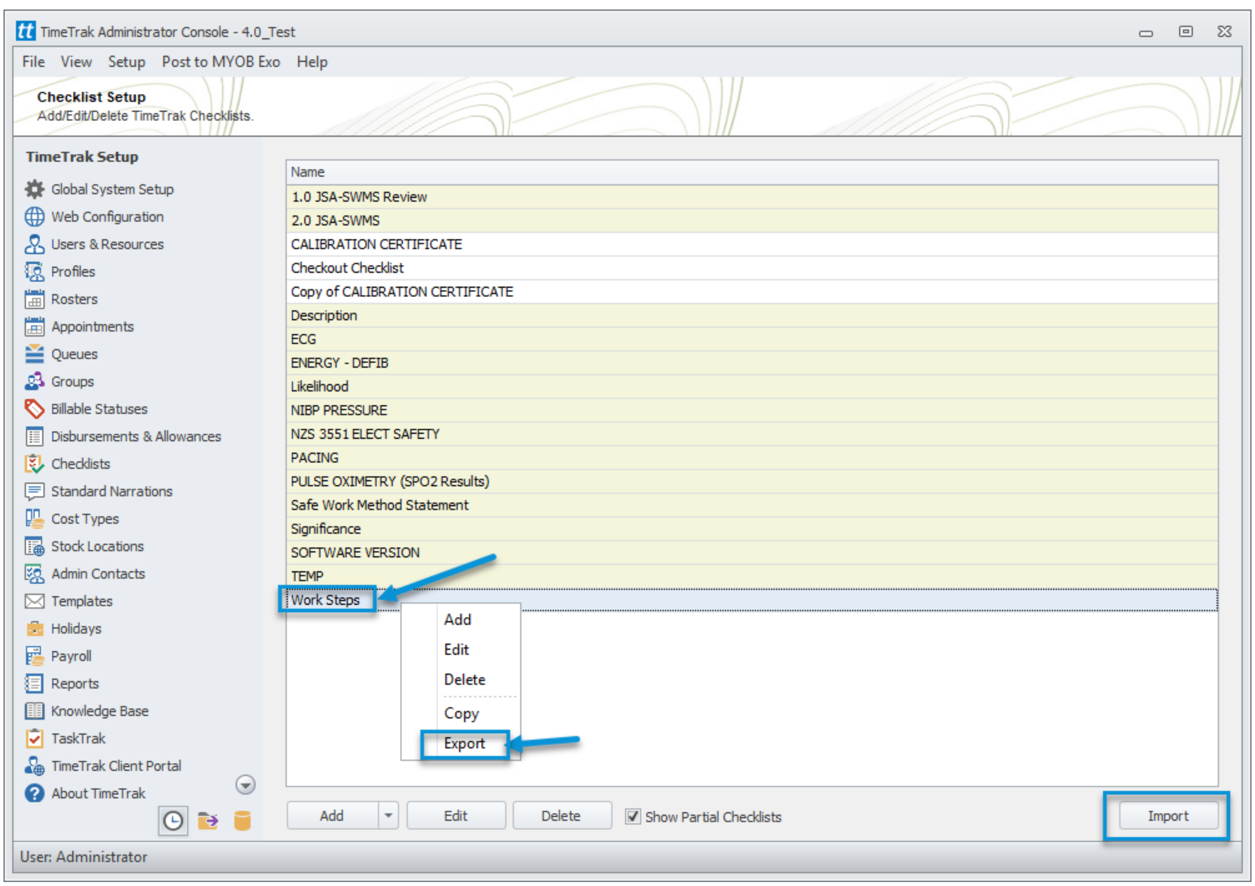
When you right click any Checklist item, there's an option to copy it as per below:



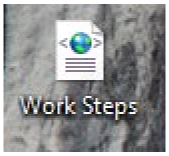
When you copy a Checklist item, the only thing that is left blank is the name of the Checklist item as per below.



Another copy function available is the ability to copy a whole Checklist and import/export Checklist files to be used in another system (e.g. test environment).



To do this, right click on the Checklist, from there you can copy the Checklist or export. The checklist file will be in .XML format.



To import the file, it's as simple as clicking the import button on the bottom right as per above in the Admin Console then browsing to the XML file.

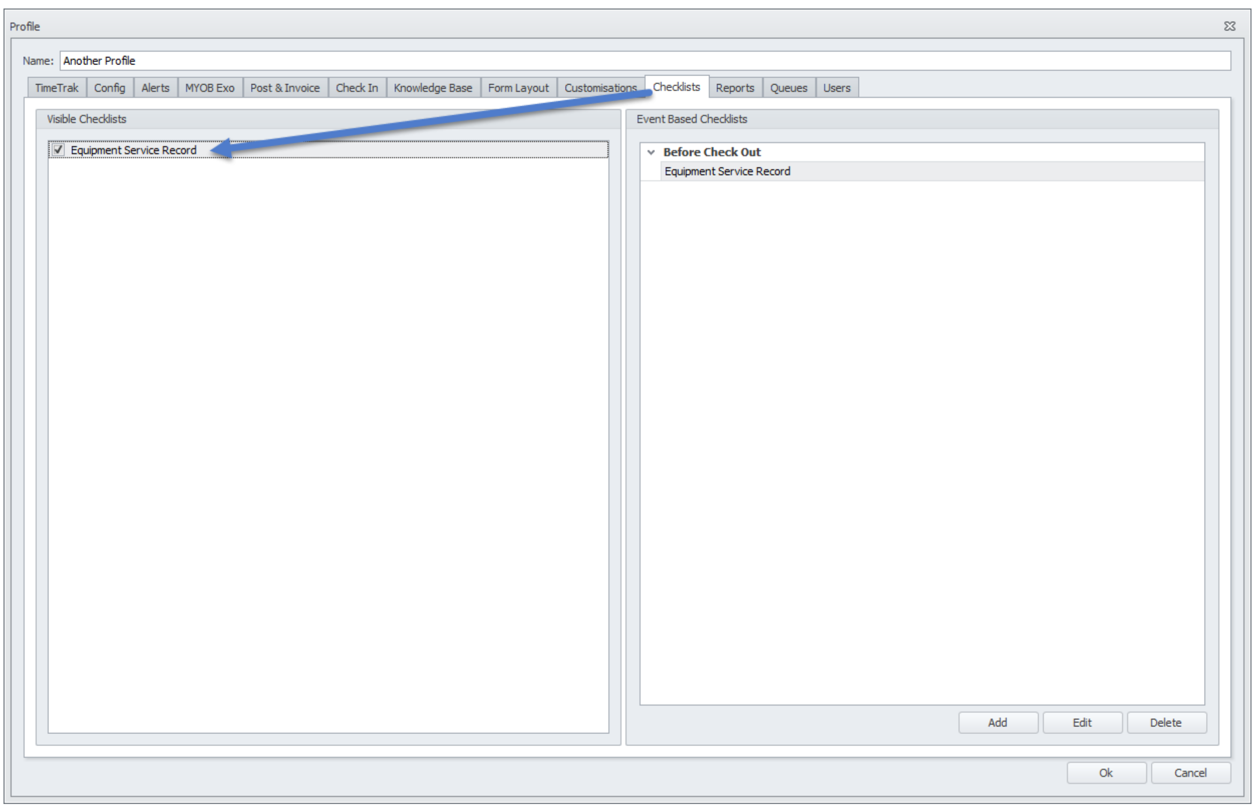
Enabling a Checklist against a Profile

Once the Checklists are set up and ready to go, they need to be enabled against a Profile.

In the TimeTrak Admin Console, click into the **Profiles** menu.

Go to the **Checklists** Tab.

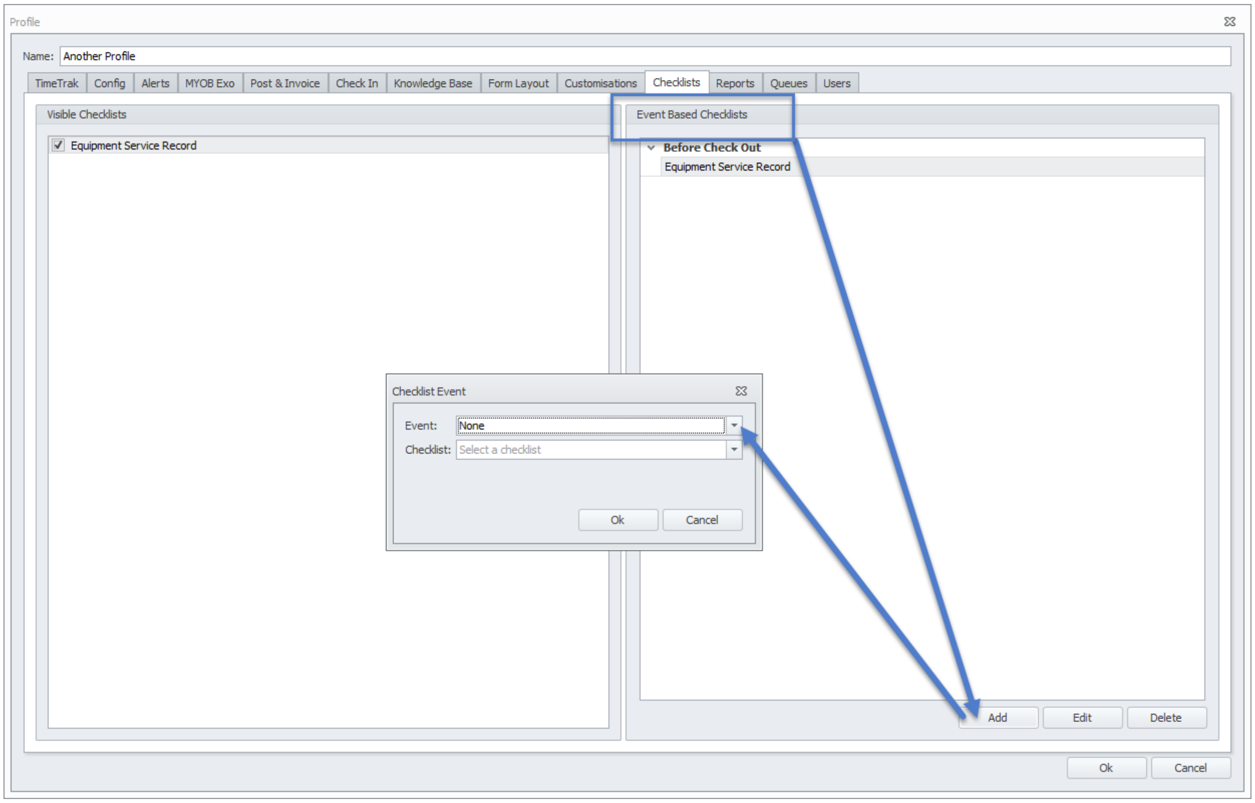
In the left panel, tick on the Checklists that need to be visible against the Job.



In the right panel, add in events which fire off a Checklist.

Enabling Event Based Checklists

Event Base Checklists are located in **Admin Console** > **Profiles > Checklists**



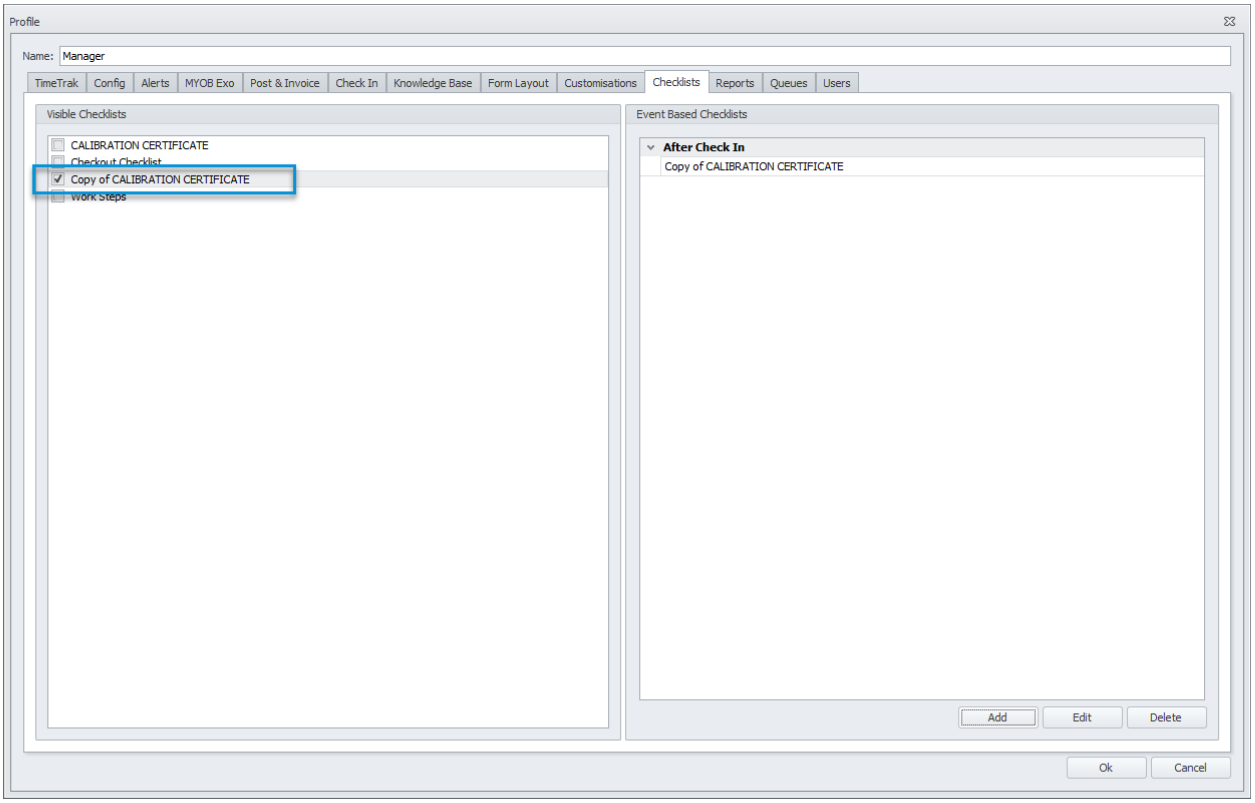
Event Base Checklist options include:

- After Start Travelling
- After Check In
- Before Check Out
- After Add Time Entry
- After Add Disbursement
- After Task Completed
- Before Post
- On Suspend
- After Add Client
- After Add Job
- After Add Appointment
- After Add Serviceable Unit

These options will bring up a Checklist immediately when the event occurs. For example, when a user clicks “start travel”, they will be prompted to complete the Checklist that is assigned to this event against their profile.

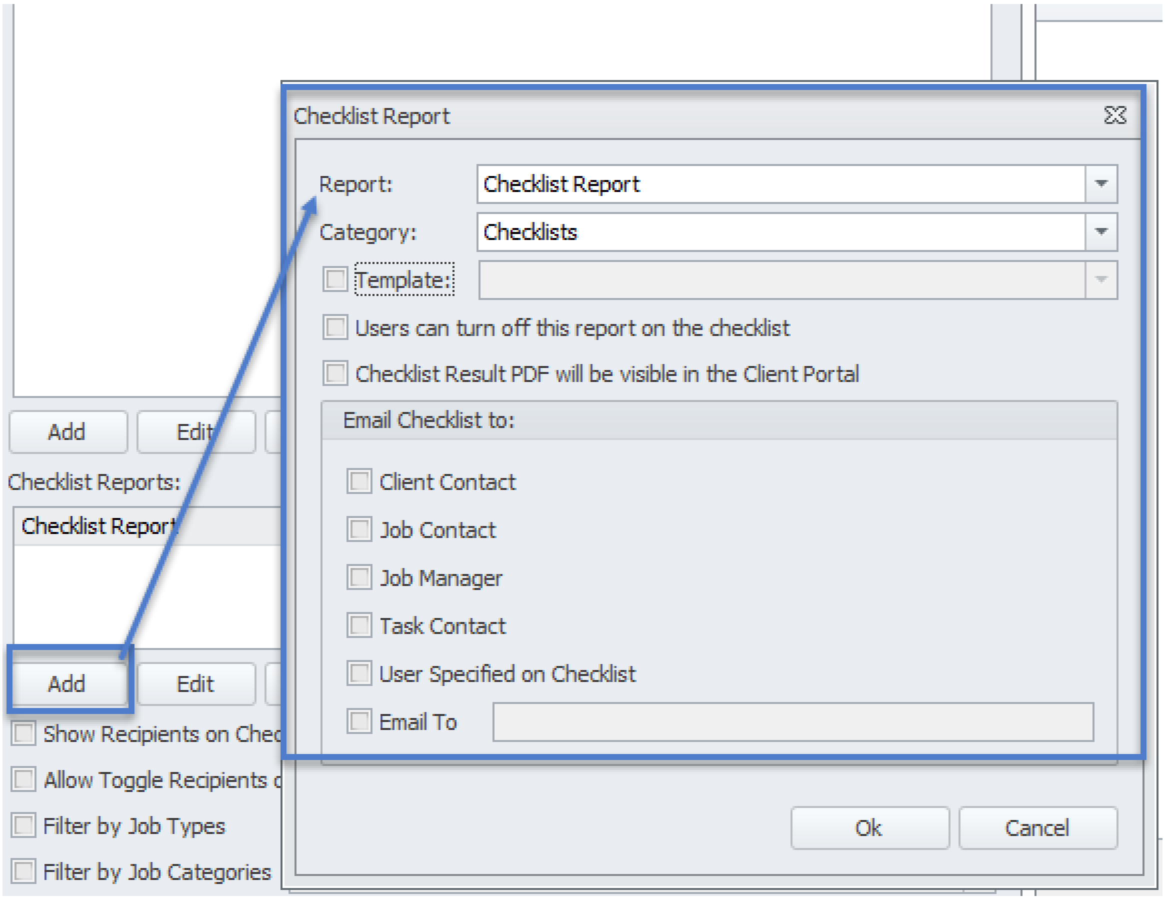
Please keep in mind when running the Checklist that it might not have the required information in it depending on when in the process the user is up to.

For example, if a Checklist runs on the event of **After Check In** – the report cannot display the time the user has spent on the job – because they have not yet finished the job and more importantly saved the time entry.



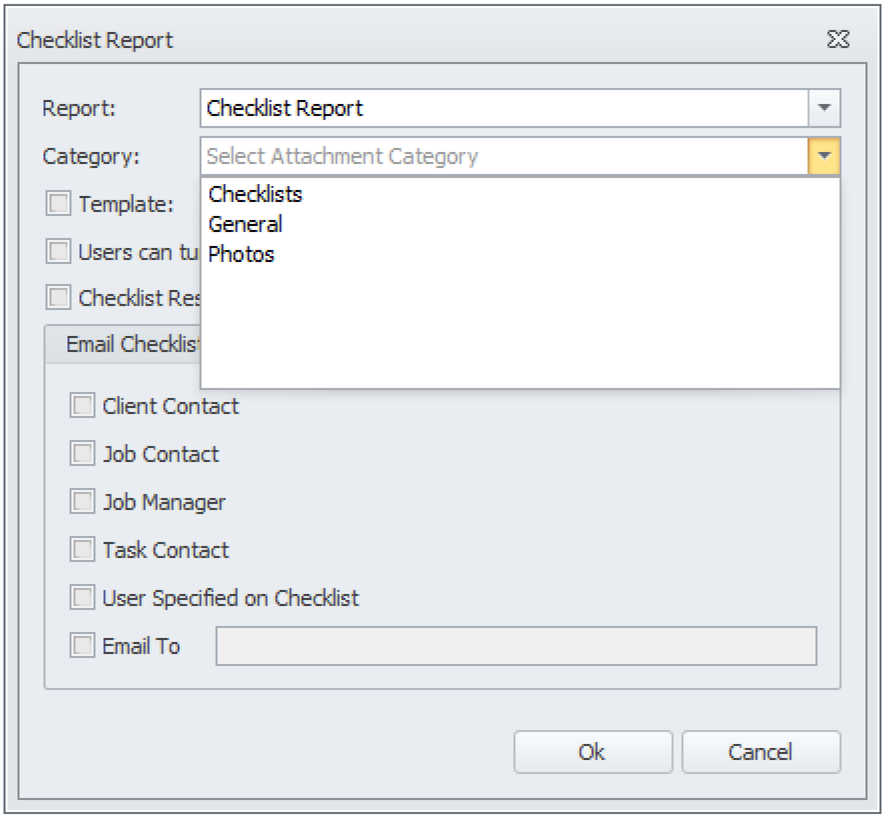
Also to keep in mind that if you want the Checklist to be saved as a draft, the Checklist must be ticked on to made visible in TimeTrak Mobile. If the Checklist hasn't been made a "Visible Checklist" and the Checklist is only event based, users are still able to save as draft but they can't access the draft unless the Checklist is made "visible" against their profile as well.

Checklist Report Settings



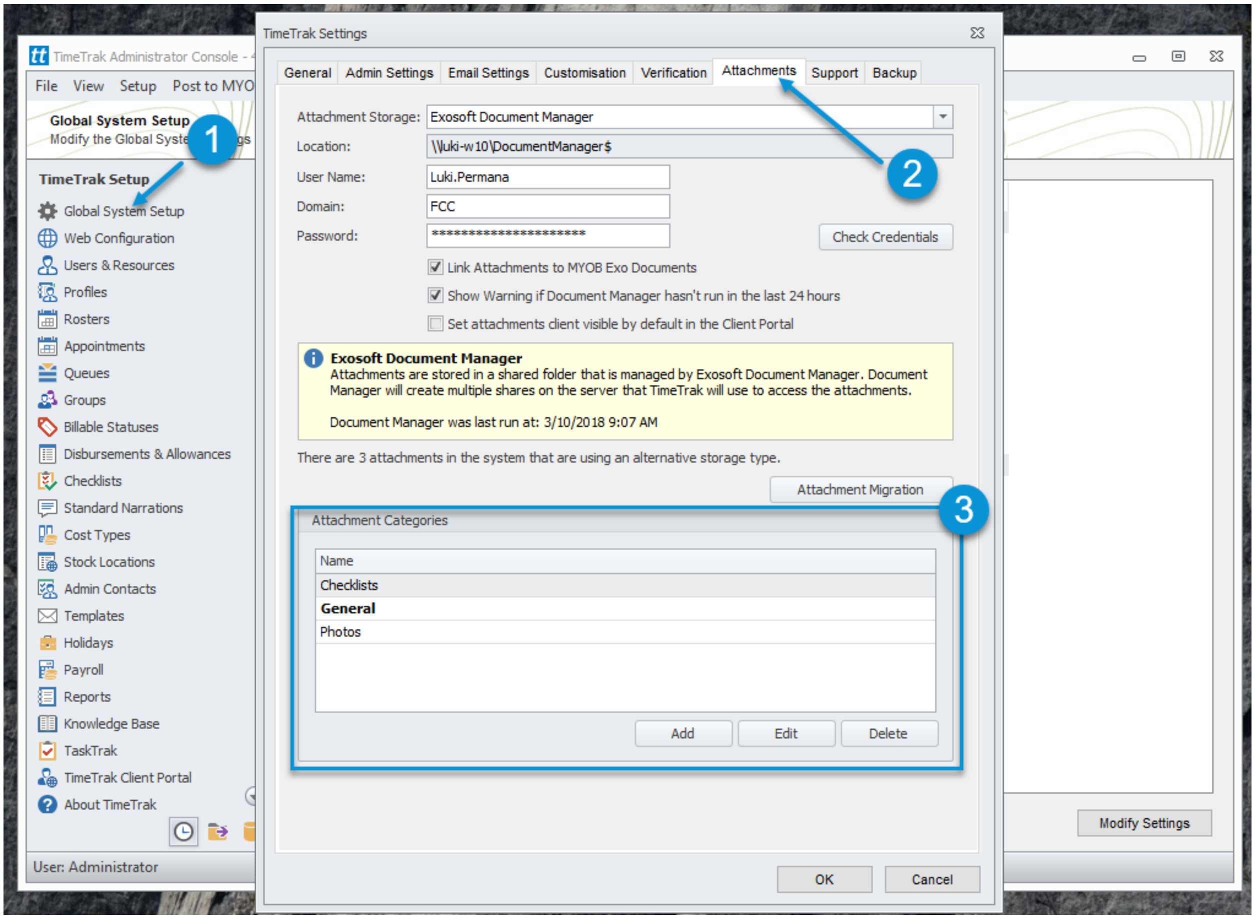
Checklist can be created as a report document that you can review when it is submitted. Since the checklist can be created as a form, you can see and print the document as PDF file. In here, you can assign the Checklist into a Checklist Report as default or a report that you created.

- Report
  This dropdown list will bring up all the reports that can be assigned for Checklists.
  Note: you need to set your report setting and the category as Checklist.
- Category
  By default, there are three attachment categories as per below 'Checklists', 'General' and 'Photos'.



However, there is the ability to add more:
TimeTrak Admin Console
Global System Setup
Attachments

Add as per below:



A working example of this is if a company has a lot of Checklists that are completed against a job and they would like the ability to filter on the type of checklists. E.g. Health and Safety could be its own attachment category, where Health and Safety Checklists are assigned to by default allowing users to filter a job's attachments on the specific attachment type.

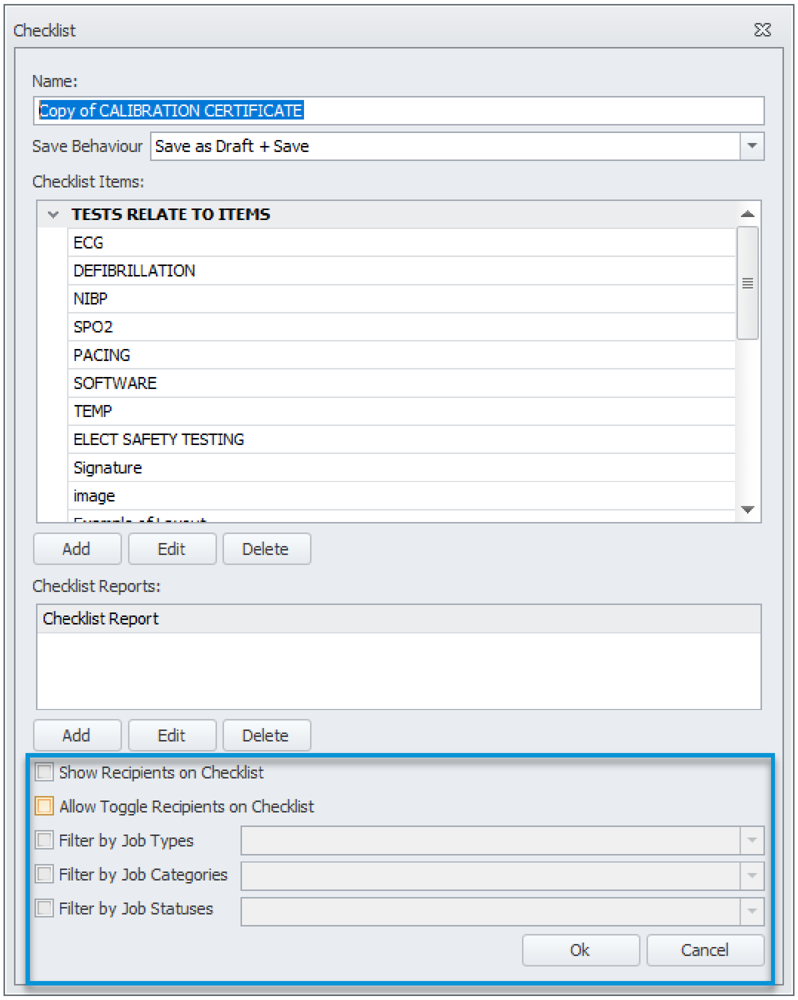
- User can turn off this report on the Checklist – this setting allows users to choose not to send this report. Since a Checklist can have any number of reports assigned to it, it might be that one does not have to be emailed at that time.

- Checklist Result PDF will be visible in the Client Portal – if the Client Portal website is set up then by default the Checklist will be visible for clients who have access to attachments.

- Email Checklist to:
    - Client Contact – this is the default contact assigned to the Debtor Account
    - Job Contact – this is the contact assigned to the job
    - Job Manager – this is internal staff (usually) and will look at the Job Manager against the job
    - Task Contact – this will pick up the contact assigned to the task

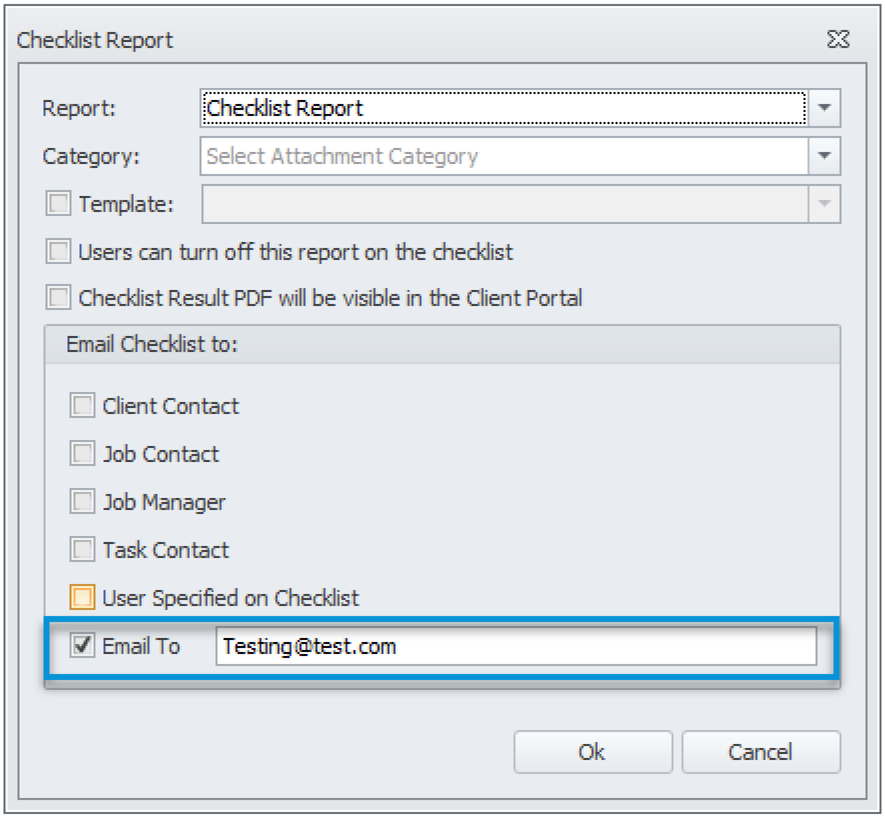
- User Specified on Checklist – this will allow the user in the Checklist to enter in email addresses manually
- Email to – this will email any addresses entered into this field.

Checklist Settings

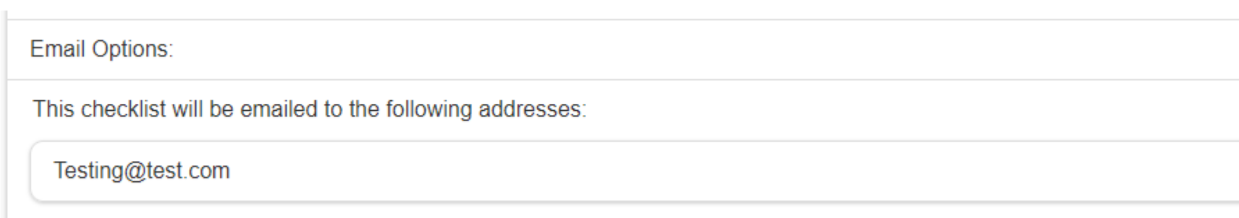


In the checklist, you can also have a setting to filter based on the job, categories, and statuses.

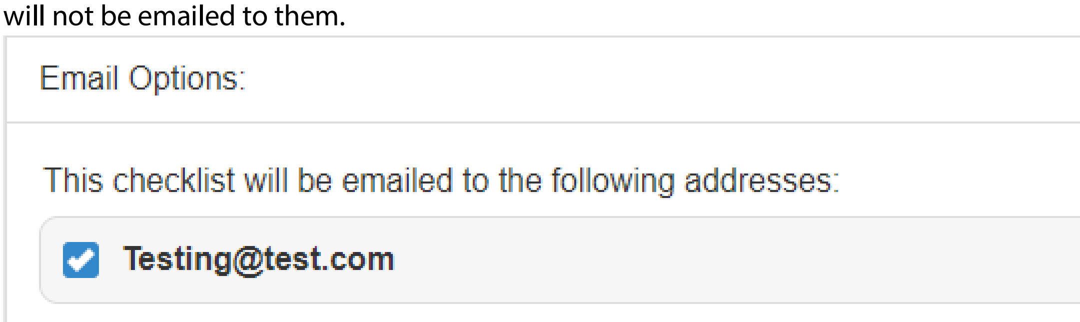
- Show Recipients on Checklist
  If this is enabled, any email address that the report is going to be sent to will be visible to the Mobile user just before they submit the Checklist. In the below example, this Checklist report is hard coded to be emailed to testing@test.com"



On completing the Checklist, the Mobile user can see that the results of the Checklist are going to be emailed to "testing@test.com"

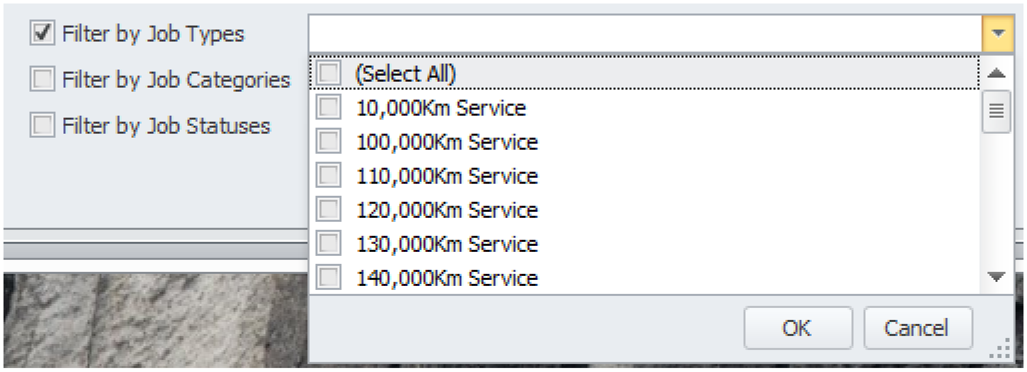


- Allow Toggle Recipients on Checklist
  This setting is to complement the previous setting. If this ticked on, the Mobile user is not only able to see the recipient email but also able to uncheck the recipient so the Checklist results will not be emailed to them.



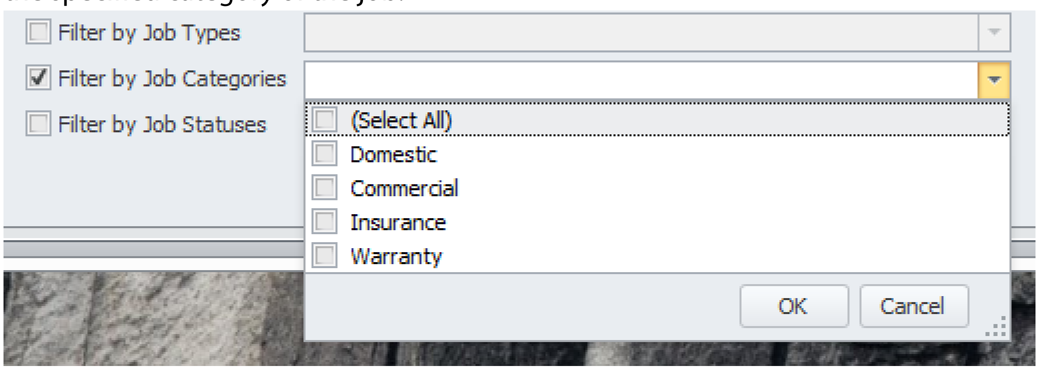
- Filter by Job Types

  Against a Checklist, there is the option to only display the Checklist against the specified job types.



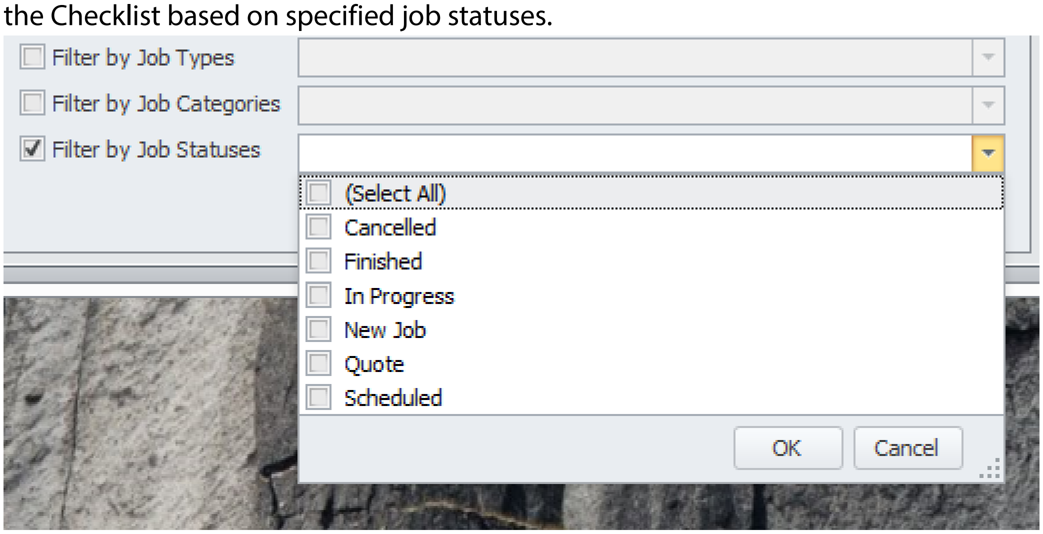
- Filter by Job Categories

  Similar to above, against a Checklist there is the option to only display the Checklist based on the specified category of the job.



- Filter by Statuses

  Again similar to the above two settings, against a Checklist there is the option to only display the Checklist based on specified job statuses.



These settings are useful, especially if you want to set your Checklists based on job criteria.

A working example of this is the “Warranty” Checklist could require completely different information to a “Domestic” Checklist.
In this case, we could set an event-based Checklist on “Checkout” against a profile and stipulate both a “Domestic” and “Warranty” Checklist on this event.
Based on the job category that is assigned against the Checklist, the correct Checklist would be available depending on the job category the user checked out of.