



Checklists in TimeTrak For v4.0.34 onwards

User guide

Contents

- Introduction to Checklists in TimeTrak..... 3
- Setting up a Checklist Report..... 4
- Types of Checklists 7
- Setting up a Checklist..... 7
- Extra Options on Checklists 11
- Checklist Items 13
- Enabling a Checklist against a Profile..... 32
- Enabling Event Based Checklists 33
- Checklist Report Settings 34

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

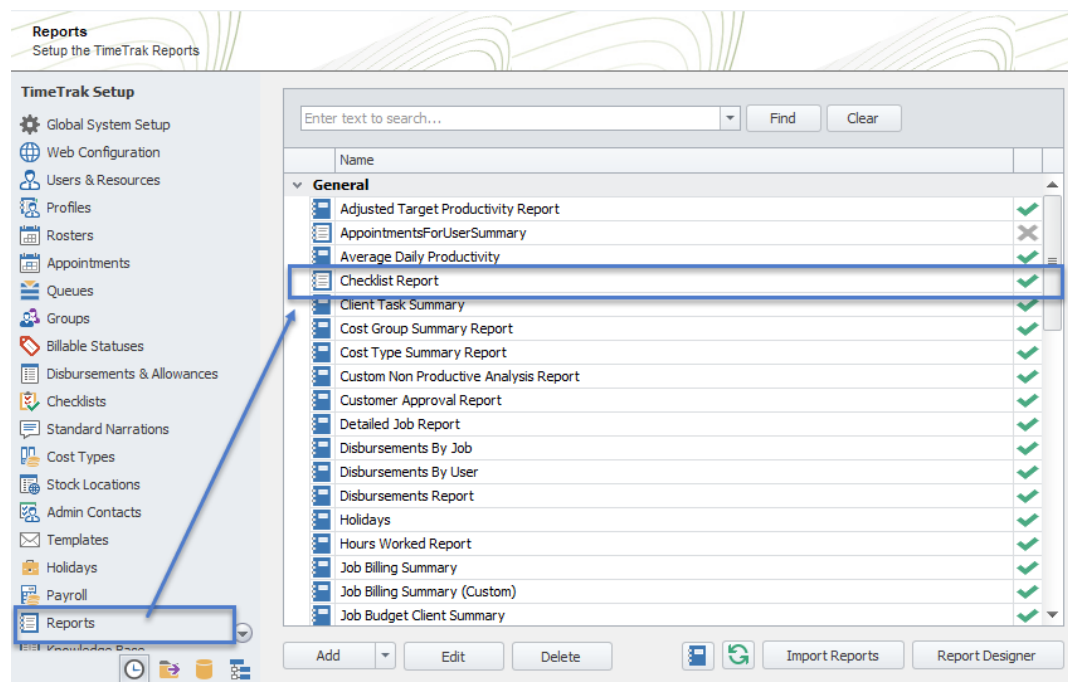
- **Health and Safety (JSA) Checklists** – this usually has questions about site safety and photos of any identified issues. It also usually has the technicians sign off and is sent to both internal and external people.
- **Service Checklists** – This is usually very much a list of things that need to 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.

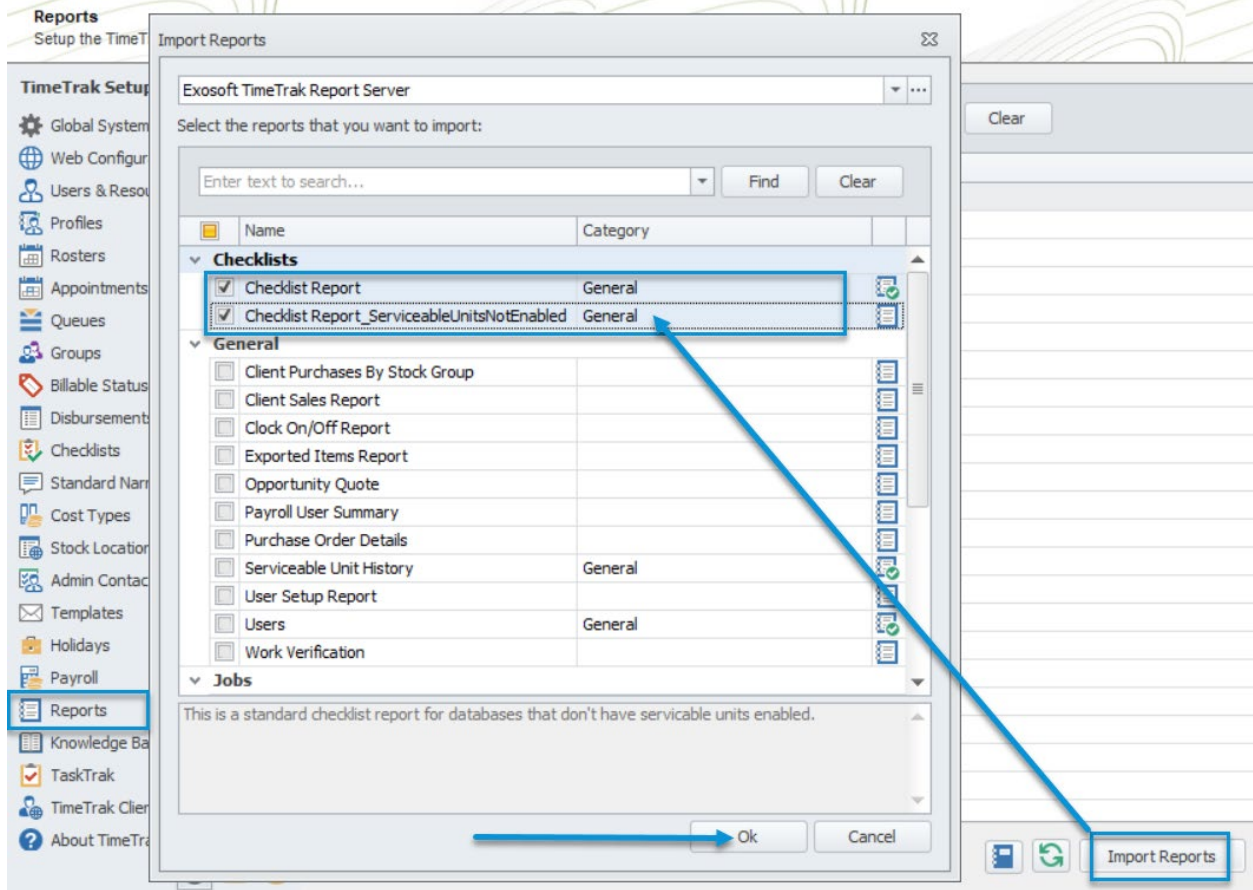


If there is no Checklist Report then the 'out of the box' Checklist Report can be added via the **Import Reports** button.

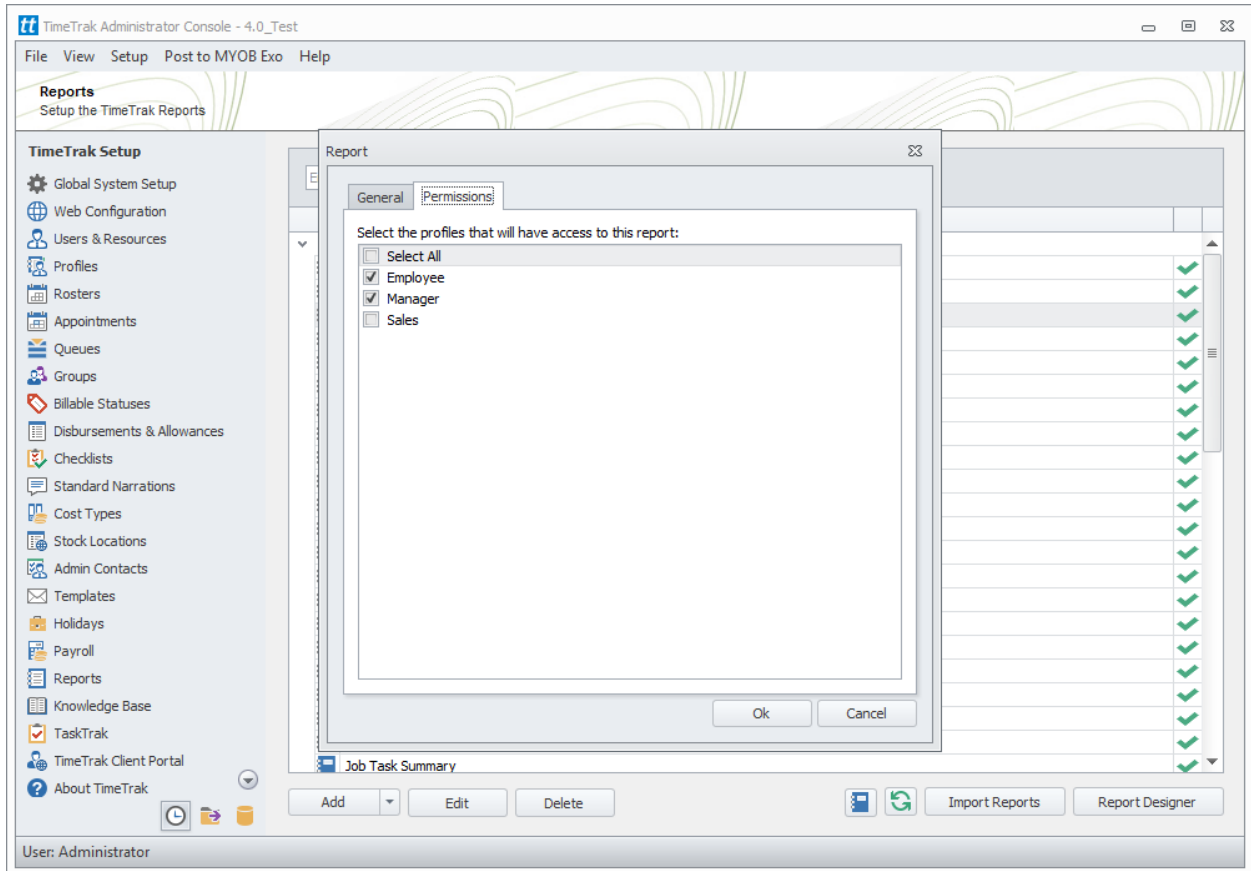
Tick on the **Checklist Report** or **Checklist Report_ServiceableUnitsNotEnabled**

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.

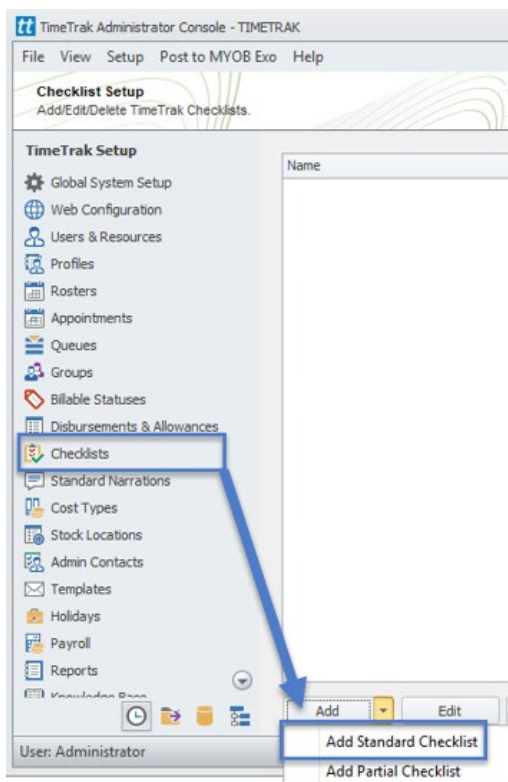
A **Partial Checklist** cannot have a report assigned against it, but once it is created it can be used more than once, in more than one checklist. An excellent example of a Partial checklist is having one for client and technician sign off and adding it into the bottom of every Standard Checklist.

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 be able to be saved. Refer to [Setting up a Checklist Report](#) for this set up.

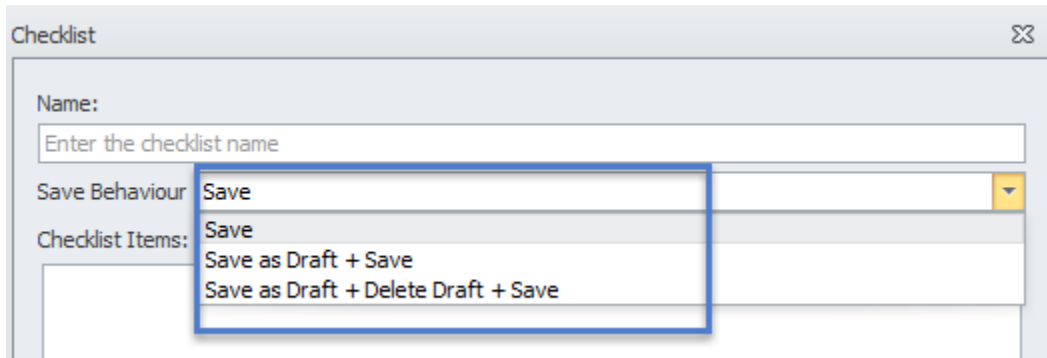
Give the Checklist a meaningful **Name**, this will be displayed on the websites.

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.

© These files have been compiled by Exosoft and may not be reproduced without our express permission.

- [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.

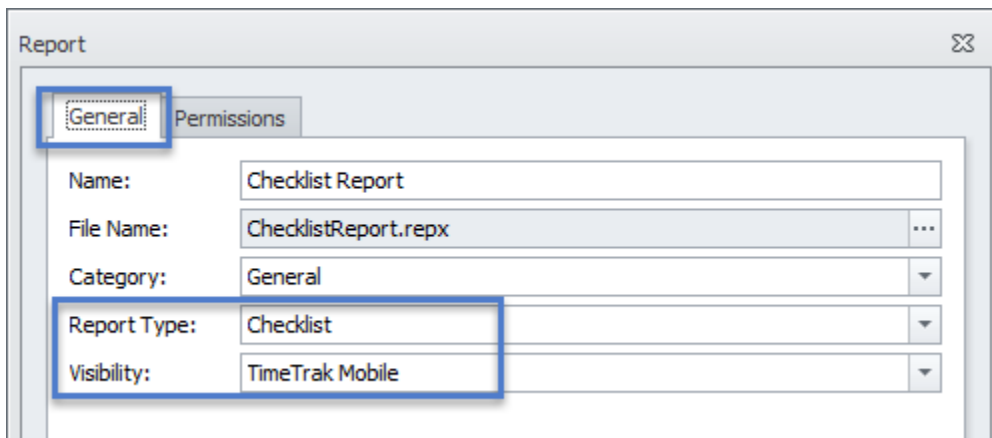


Add in at least one [Checklist Item](#).

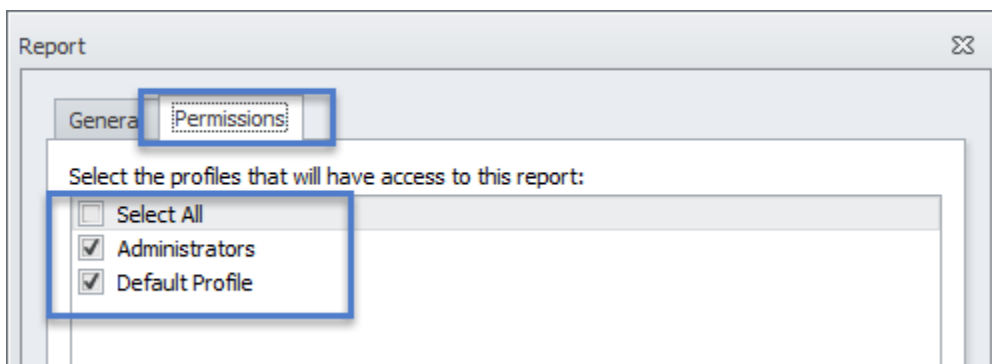
Select the [Checklist Report](#).

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.



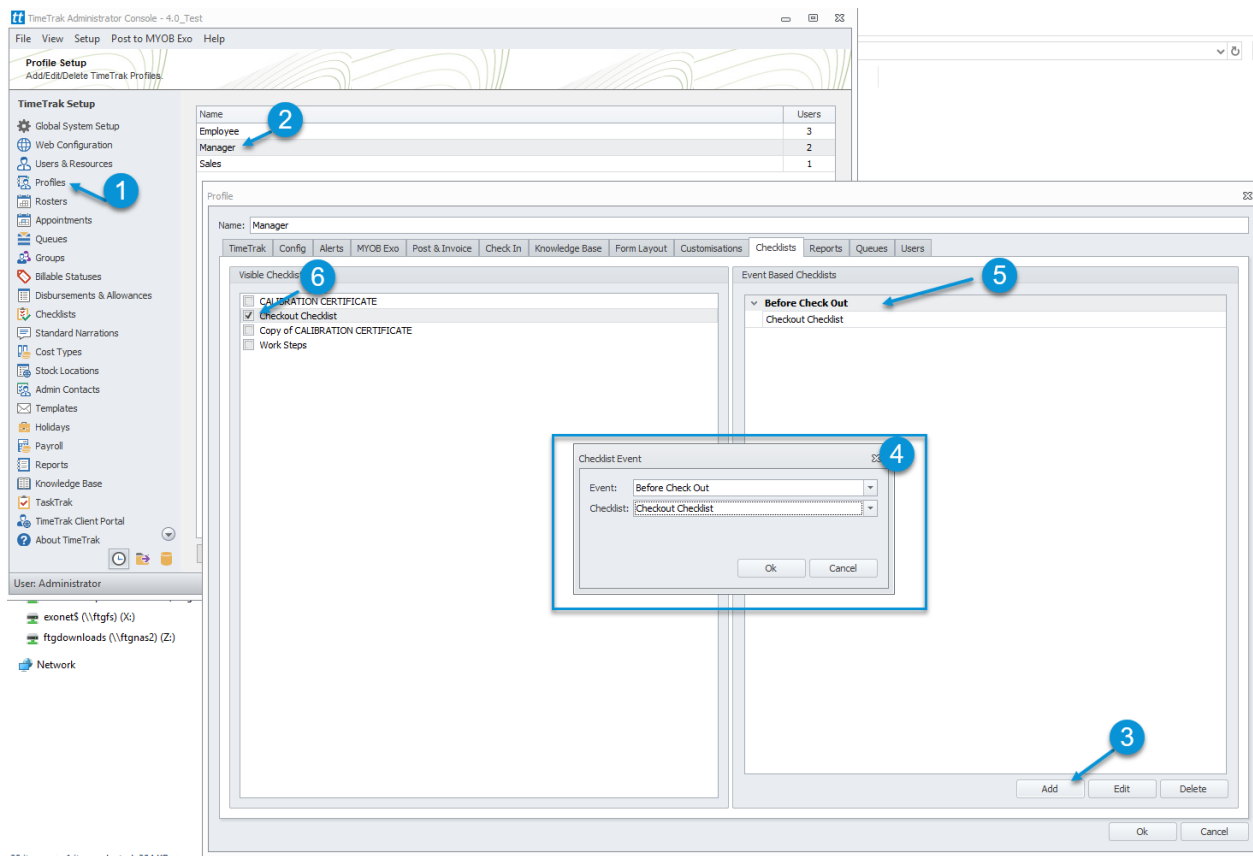
In the **Permissions** tab tick on the profiles who can see the Checklist Report or Select All.



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

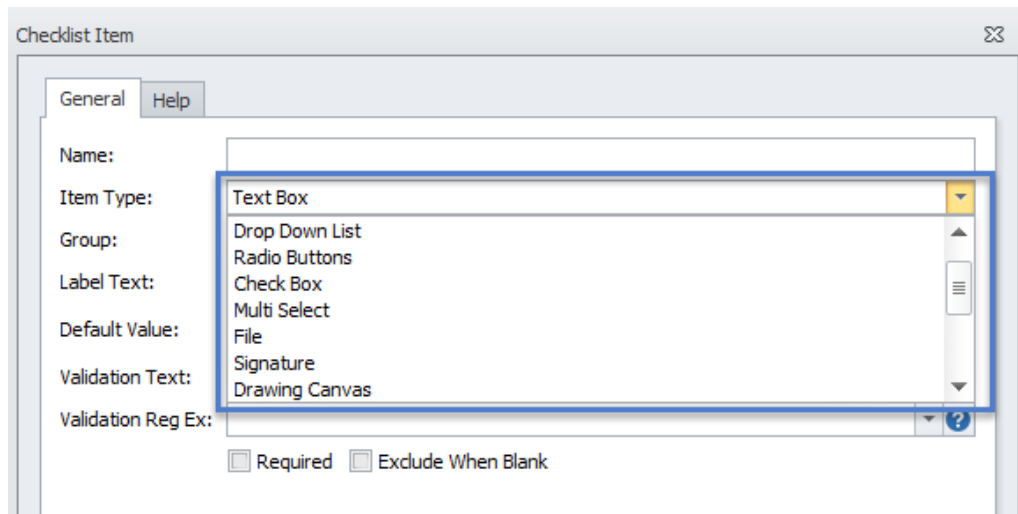
There is the ability to choose who receives the PDF in an email and to filter which jobs the Checklist will display against.

The screenshot displays a configuration window for checklists. At the top, there is a 'Name:' field containing 'JSA' and a 'Save Behaviour' dropdown menu set to 'Save as Draft + Save'. Below this is a 'Checklist Items:' section with a table containing one item: 'Assessed the flooring is clear of debris'. Underneath the table are 'Add', 'Edit', and 'Delete' buttons. The 'Checklist Reports:' section has a table with one report: 'Checklist Report', also with 'Add', 'Edit', and 'Delete' buttons. A blue-bordered box highlights a section of options: 'Show Recipients on Checklist' (checkbox), 'Allow Toggle Recipients on Checklist' (checkbox), 'Filter by Job Types' (checkbox with dropdown), 'Filter by Job Categories' (checkbox with dropdown), and 'Filter by Job Statuses' (checkbox with dropdown). At the bottom right are 'Ok' and 'Cancel' buttons.

- [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



Checklist Item

General Help

Name:

Item Type: Text Box

Group: Drop Down List

Label Text: Radio Buttons

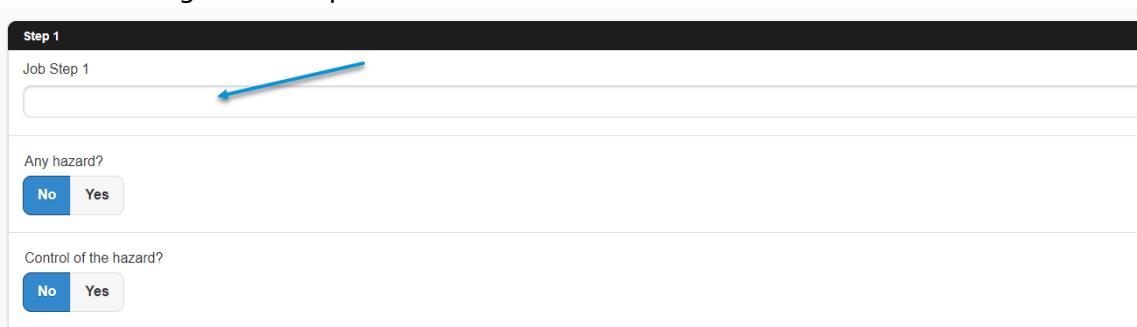
Default Value: Check Box

Validation Text: Multi Select

Validation Reg Ex: File

Required Exclude When Blank

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



Step 1

Job Step 1

Any hazard?

No Yes

Control of the hazard?

No Yes

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

Step 1

Job Step 1

Any hazard?

No Yes

Likelihood

Likelihood *

Daily Weekly Monthly Annually Unlikely

Significance

Significance *

Insignificant Minor Moderate Major Significant

Description

Description *

- **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.

TESTS RELATE TO ITEMS

ECG

YES NO

DEFIBRILLATION

YES

YES
NO

- **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.

Step 1

Job Step 1

Any hazard?

No Yes

Control of the hazard?

No Yes

- **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.

TESTS RELATE TO ITEMS

Example of CheckBox

Item 1

Item 2

Item 3

- **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.

Step 1

Job Step 1

Any hazard?

Likelihood

Likelihood *

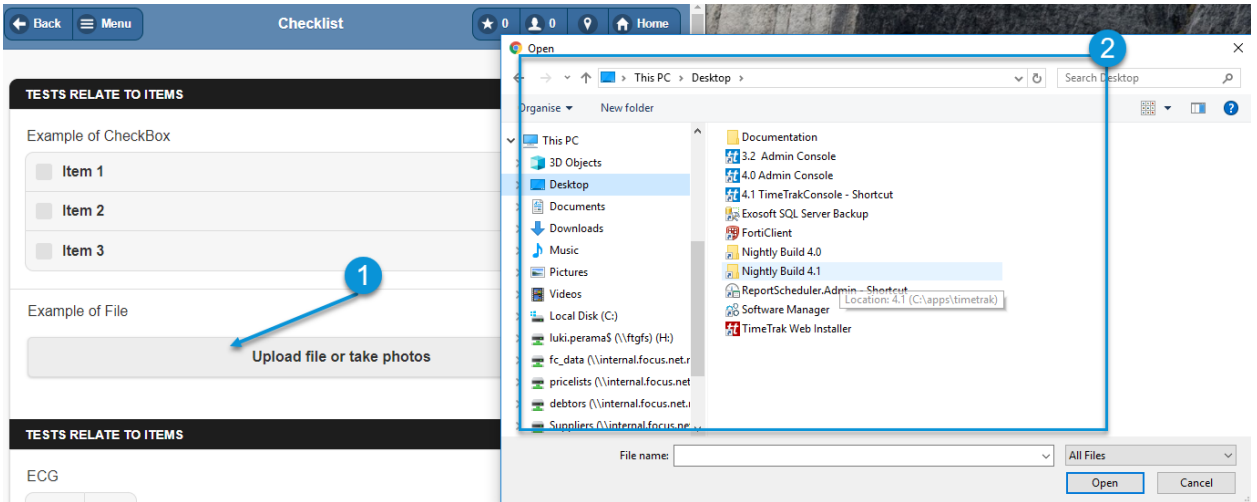
Significance

Significance *

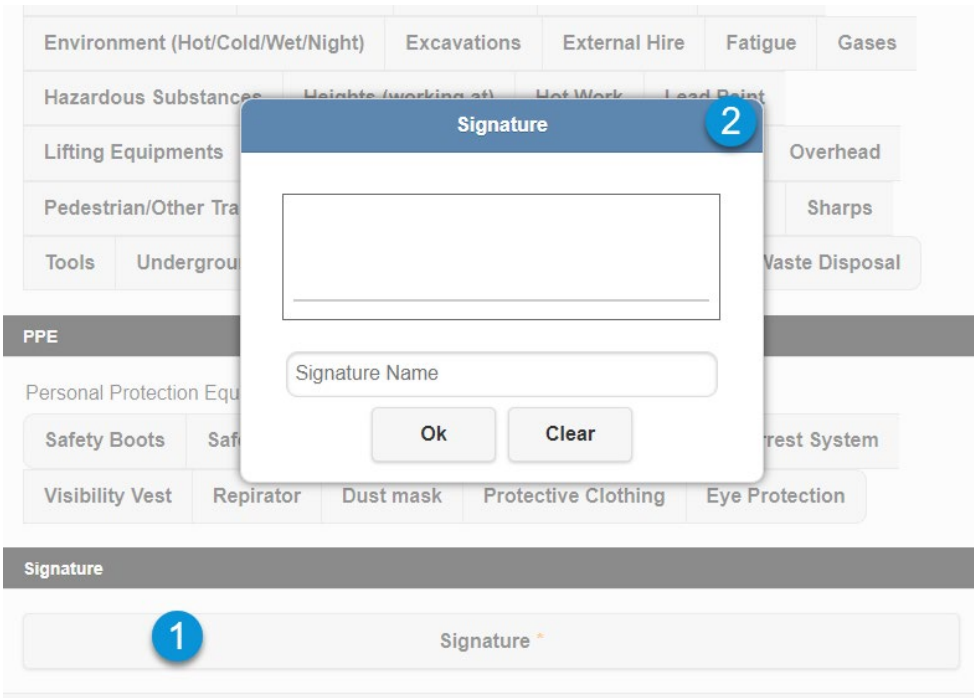
Description

Description *

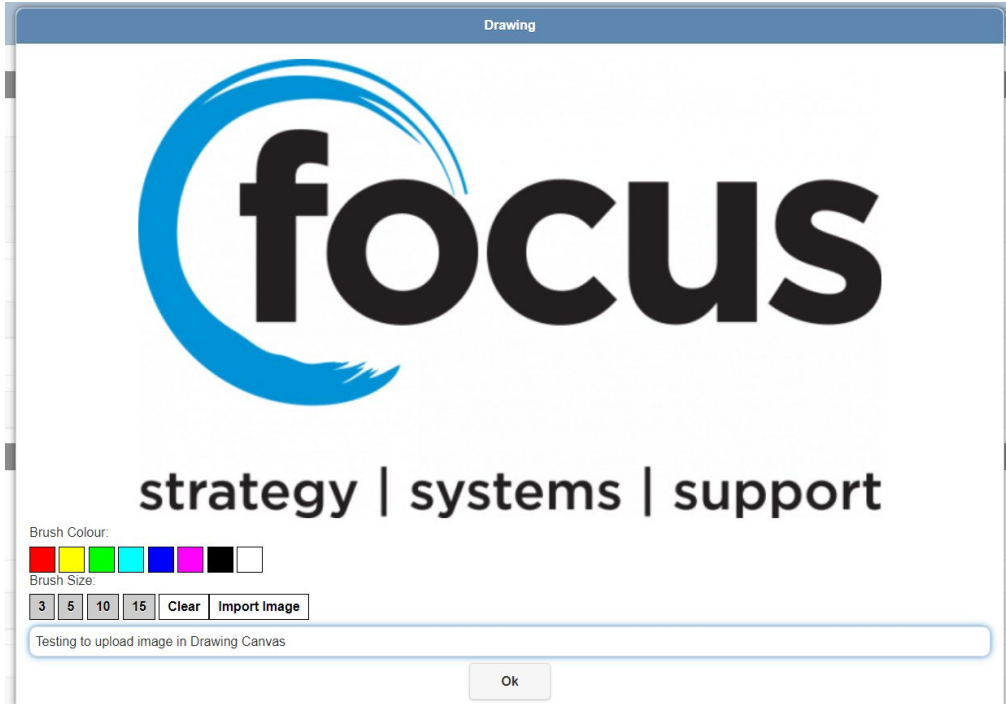
- **File** – this is a browse option in the Checklist that allows the user to search the devices local storage for a file or photo, alternatively they could take a photo and upload that.



- **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.

Example of Job History Note

Subject

Note

- **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.

Example of Debtor History Note

Subject

Note

- **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.

The screenshot shows a 'Checklist Item' form with the following fields and values:

- Name: Example of Disbursement
- Item Type: Disbursement
- Group: TESTS RELATE TO ITEMS
- Label Text: Example of Disbursement
- Disbursement: STANDARD WINDSHIELD WIPER
- Quantity: 3
- Required:

<input checked="" type="checkbox"/> Example of Disbursement
STANDARD WINDSHIELD WIPER
3 @ \$12.95
\$38.85

- **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.

The screenshot shows the 'Checklist Item' form with the 'Partial Checklist' dropdown menu open, displaying the following options:

- Select Partial Checklist
- 1.0 JSA-SWMS Review
- 2.0 JSA-SWMS
- Description
- ECG
- ENERGY - DEFIB
- Likelihood
- NIBP PRESSURE

- **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.

Checklist Item

General

Name: Remember to sign in at reception

Item Type: Label

Group: Site Check In

Label Text: Remember to sign in at reception

Site Check In

Remember to sign in at reception

Email Options:

This checklist will be emailed to the following addresses:

luki.permana@focus.net.nz

Save as draft

Save

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

03/10/2018 08:45 AM

TESTS RELATE TO ITEMS

ECG

YES NO

DEFIBRILLATION

03/10/2018 08:45 AM

Day	Month	Year	Hours	Minutes
Tue 02	09	2017	07	30
Wed 03	10	2018	08	45
Thu 04	11	2019	09	

Set Cancel

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.

Checklist Item

General Help

Name: Job Step 1

Item Type: Text Box

Group: Step 1

Label Text: Job Step 1

Default Value:

Validation Text:

Validation Reg Ex:

Required Exclude When Blank

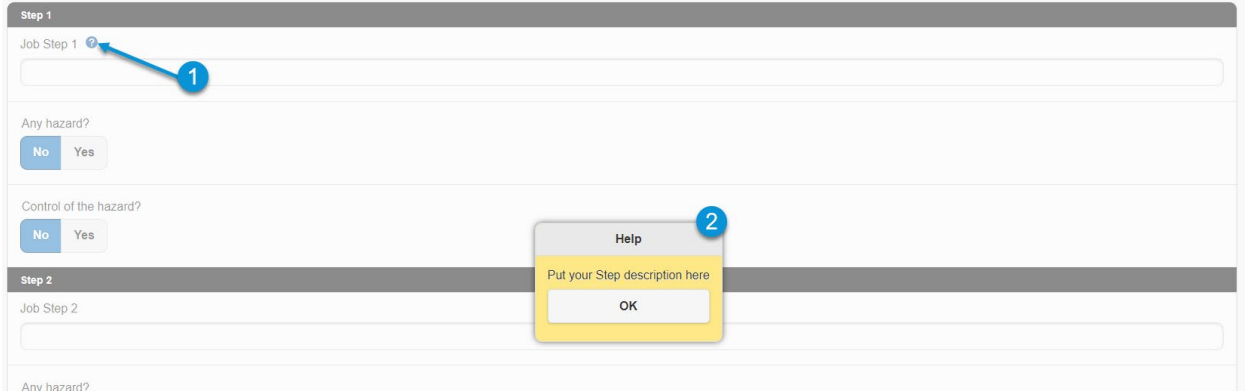
Checklist Item

General Help

Put your Step description here

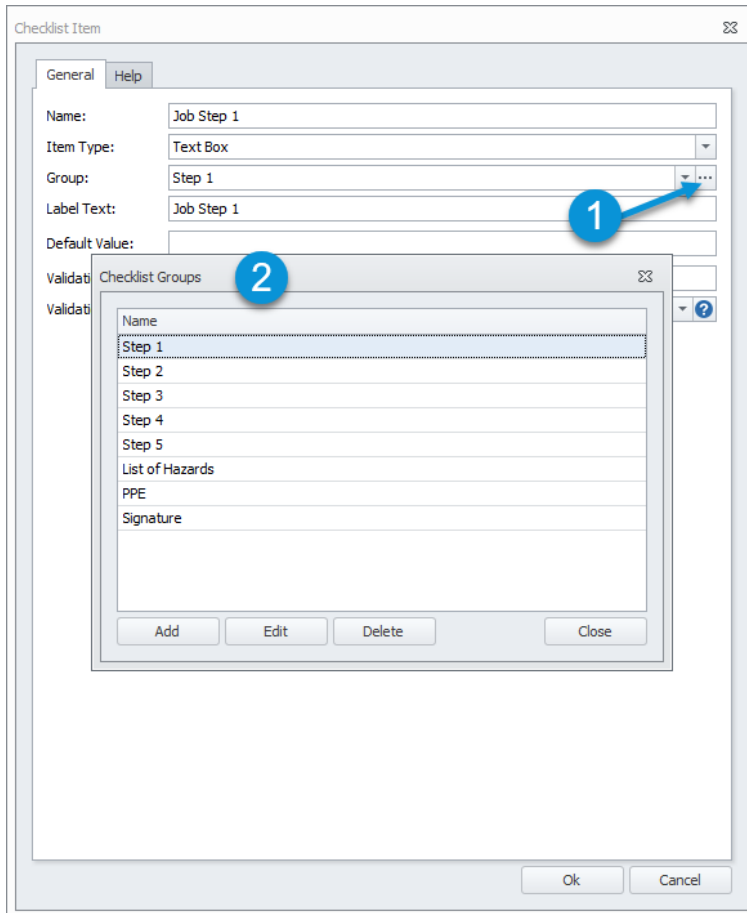
Ok Cancel

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 to be assigned to a Checklist group:

<p>▼ Step 1</p> <p>Job Step 1</p> <p>Hazard</p> <p>Control</p>
<p>▼ Step 2</p> <p>Job Step 2</p> <p>Hazard</p> <p>Control</p>
<p>▼ Step 3</p> <p>Job Step 3</p>

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

Step 1

Job Step 1 ?

Any hazard?

No Yes

Control of the hazard?

No Yes

Step 2

Job Step 2

Any hazard?

No Yes

Control of the hazard?

No Yes

Step 3

Job Step 3

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).

The screenshot shows the 'Checklist Item' configuration form. The 'Name' field and 'Label Text' field are highlighted with blue boxes and arrows, both containing the text 'Testing name/field'. Other fields include 'Item Type' (Text Box), 'Group' (Step 1), 'Default Value', 'Validation Text', and 'Validation Reg Ex'. There are also checkboxes for 'Required' and 'Exclude When Blank'.

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.

The screenshot shows the 'Checklist Item' configuration form with the 'Data Source Type' dropdown menu open. The 'Data Source Type' is set to 'None', and the dropdown menu is open, showing options: 'None', 'Sql', and 'List'. The 'Label Text' field is highlighted with a blue box and arrow.

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"**

Checklist Item

General Help

Name: STOCK_ITEM

Item Type: Drop Down List

Group: TESTS RELATE TO ITEMS

Label Text: STOCK_ITEM

Data Source Type: Sql

Data Source: SELECT STOCKCODE, DESCRIPTION FROM STOCK_ITEMS WHERE ISACTIVE = 'Y' / ?

Default Value:

Required Exclude When Blank

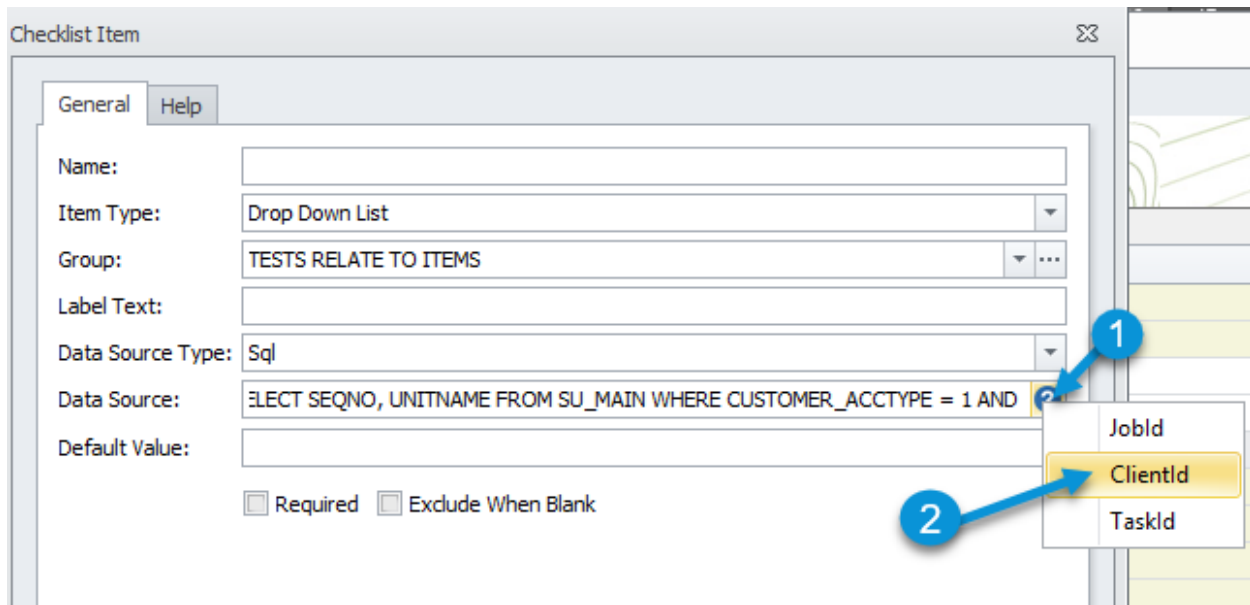
This will grab all the data from the database that matches the criteria.

STOCK_ITEM	MOBILE TMG AUDIO AMPLIFIER/EQUALISER
MOBILE TMG AUDIO AMPLIFIER/EQUALISER	MOBILE TMG AUDIO AMPLIFIER/EQUALISER
AUDIO EQUIPMENT 12 MTH EXTENDED WARRANTY	AUDIO EQUIPMENT 12 MTH EXTENDED WARRANTY
AUDIO EQUIPMENT 24 MTH EXTENDED WARRANTY	AUDIO EQUIPMENT 24 MTH EXTENDED WARRANTY
AUDIO EQUIPMENT MANUFACTURER'S WARRANTY	AUDIO EQUIPMENT MANUFACTURER'S WARRANTY
AM/FM/CD FULL LOGIC CASSETTE PLAYER	AM/FM/CD FULL LOGIC CASSETTE PLAYER
ALPINE DVA-5205 DVD/VCD/CD PLAYER	ALPINE DVA-5205 DVD/VCD/CD PLAYER
ALPINE CR01 DVD/VCD/CD PLAYER	ALPINE CR01 DVD/VCD/CD PLAYER
ALPINE INT01 DVD/VCD/CD PLAYER	ALPINE INT01 DVD/VCD/CD PLAYER
MOBILE 7 BAND AUDIO EQUALISER/AMPLIFIER	MOBILE 7 BAND AUDIO EQUALISER/AMPLIFIER
AM/FM FULL LOGIC CASSETTE PLAYER	AM/FM FULL LOGIC CASSETTE PLAYER
CDT AUDIO CAMBRIA CAX400	CDT AUDIO CAMBRIA CAX400

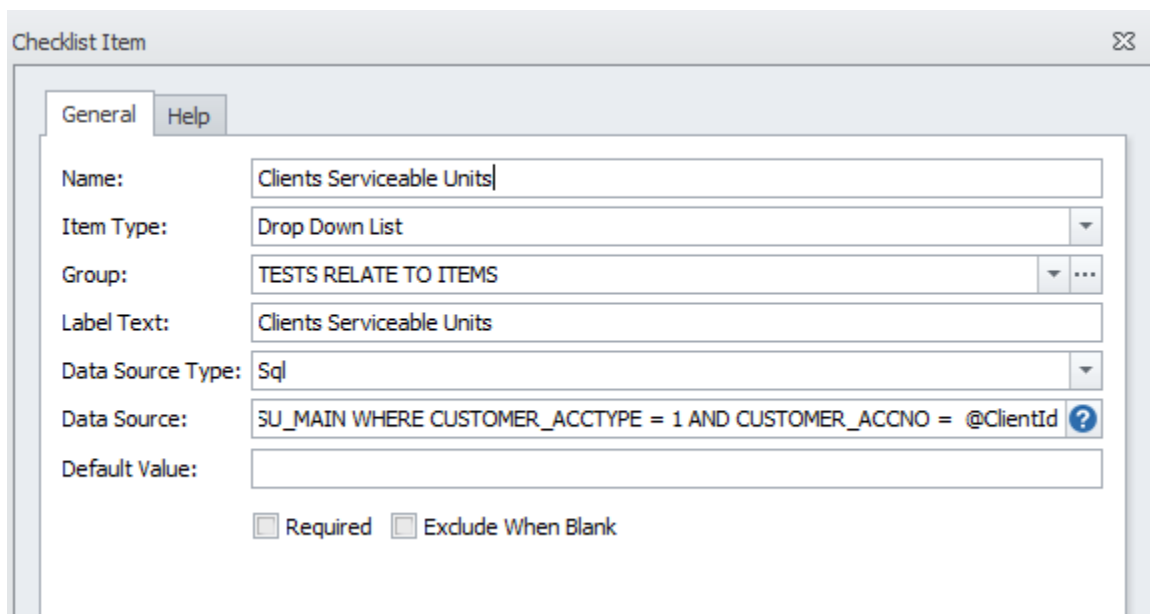
Please note: No stock transaction will occur this is just a basic example of passing a SQL query into a Checklist item.

You can also 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:

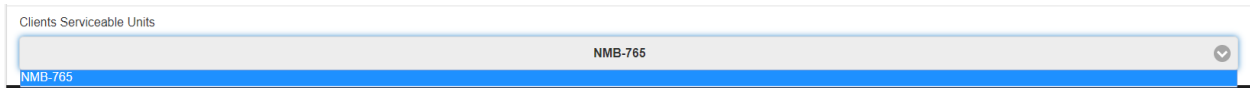


A working example of this is if you want to populate a list of Serviceable Units that are assigned to the CLIENT of the job you are working on.



**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.

The 'Checklist Item' dialog box is shown with the 'General' tab selected. It contains the following fields and controls:

- Name: Example of CheckBox
- Item Type: Check Box
- Group: TESTS RELATE TO ITEMS
- Label Text: Example of CheckBox
- Data Source Type: List
- Data Source: A table with the following data:

Caption	Value	Checklist	
Item 1	1	None	<input type="checkbox"/>
Item 2	2	None	<input type="checkbox"/>
Item 3	3	None	<input type="checkbox"/>

Below the table are buttons for 'Move Up', 'Move Down', 'Add', and 'Delete'. At the bottom, there is a 'Default Value' field and two checkboxes: 'Required' and 'Exclude When Blank'. 'Ok' and 'Cancel' buttons are at the very bottom.

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.

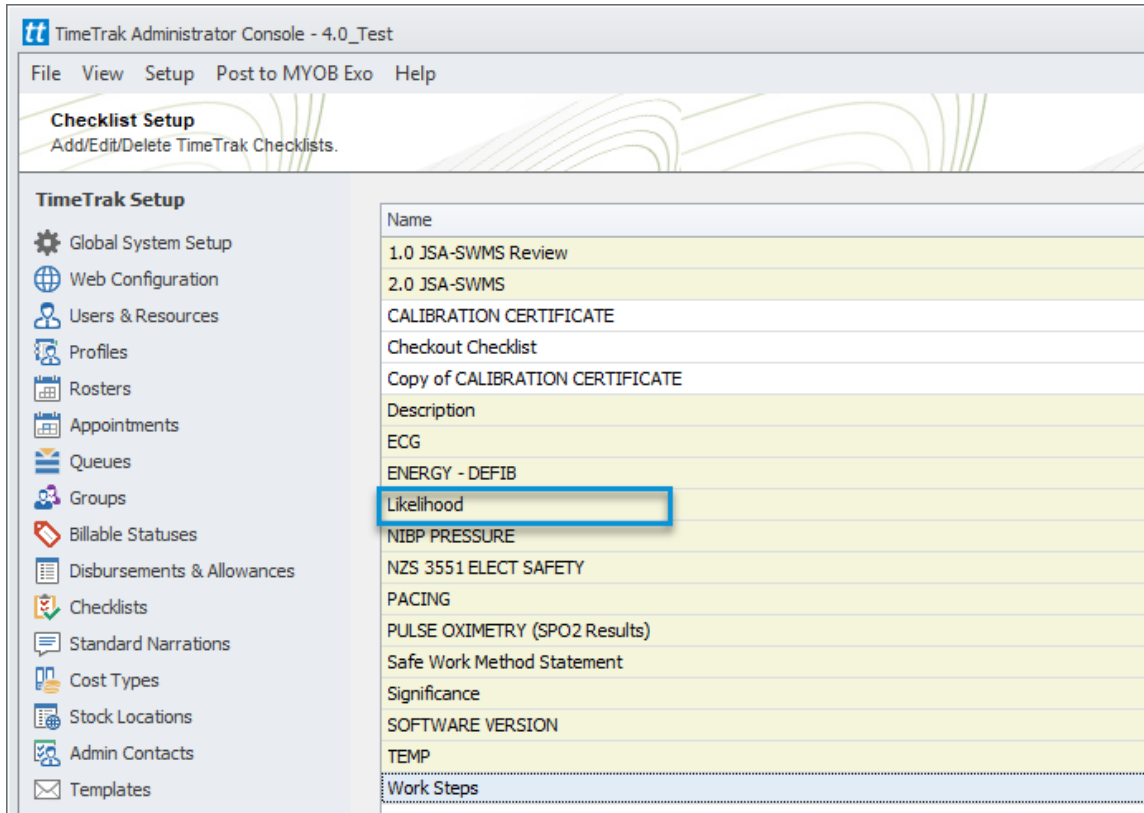
In the below example: If the user selects "Yes" to hazard they have to complete the likelihood Partial Checklist, if they select no there is no Partial Checklist assigned so they will move onto the next Checklist item in the Standard Checklist

The screenshot shows the 'Checklist Item' configuration window. The 'General' tab is selected. The fields are as follows:

- Name: Hazard
- Item Type: Radio Buttons
- Group: Step 1
- Label Text: Any hazard?
- Data Source Type: List

The 'Data Source' table is shown below:

Caption	Value	Checklist	
No	No	None	✉
Yes	Yes	Likelihood	✉

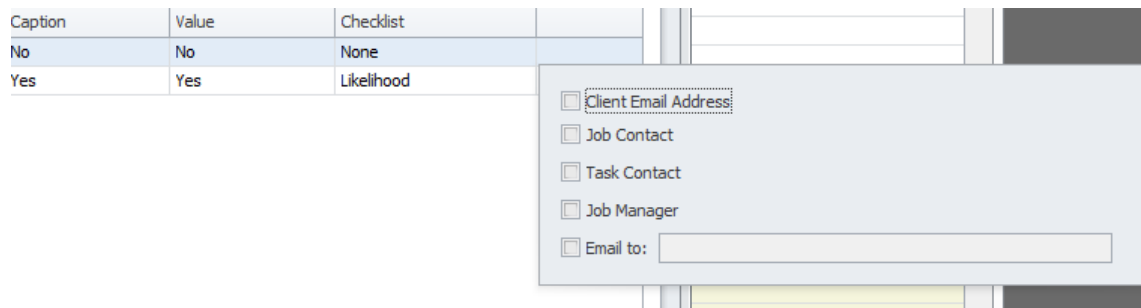


Email

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.

Caption	Value	Checklist	
No	No	None	✉
Yes	Yes	Likelihood	✉

Move Up Move Down Add Delete

Default Value: No

Required Exclude When Blank

Ok Cancel

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.

Signature

Signature *

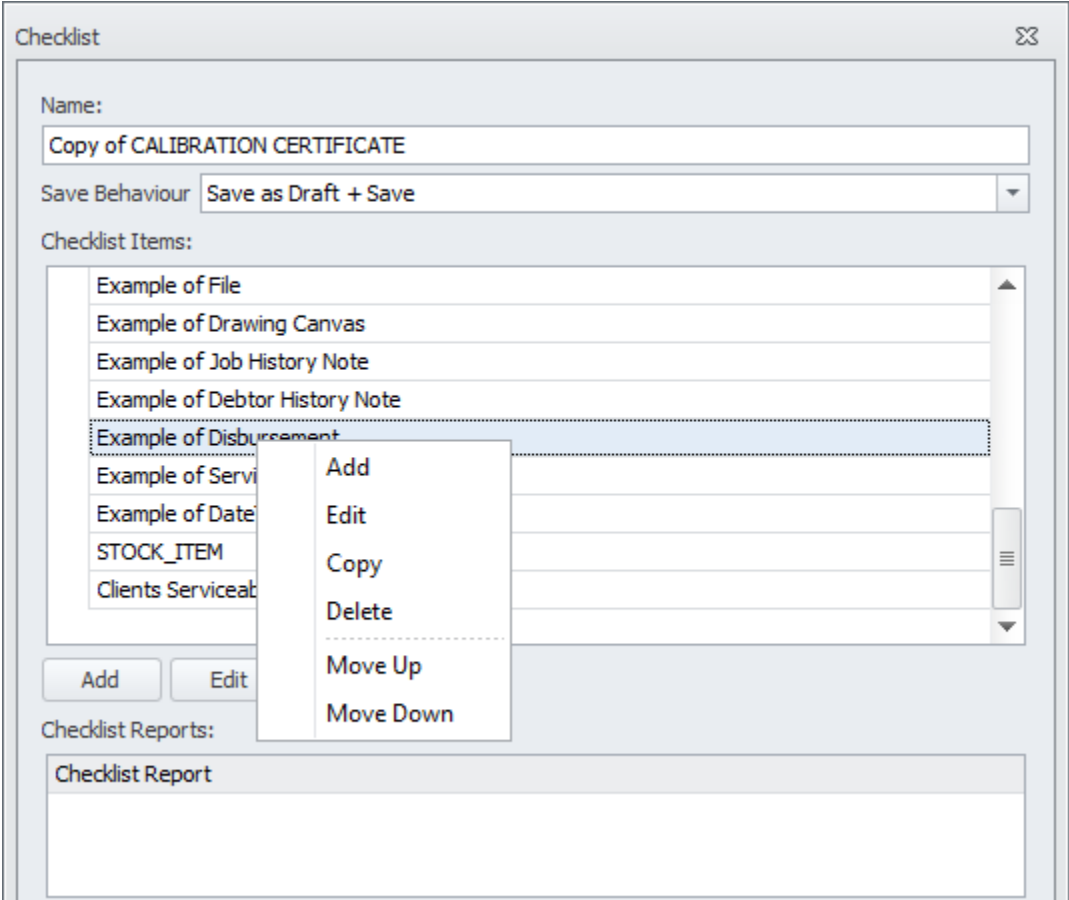
Save as draft

Save

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.

Checklist Item

General Help

Name:

Item Type: Disbursement

Group: TESTS RELATE TO ITEMS

Label Text: Example of Disbursement

Disbursement: STANDARD WINDSHIELD WIPER

Quantity: 3

Required

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).

TimeTrak Administrator Console - 4.0_Test

File View Setup Post to MYOB Exo Help

Checklist Setup
Add/Edit/Delete TimeTrak Checklists.

TimeTrak Setup

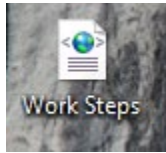
- Global System Setup
- Web Configuration
- Users & Resources
- Profiles
- Rosters
- Appointments
- Queues
- Groups
- Billable Statuses
- Disbursements & Allowances
- Checklists
- Standard Narrations
- Cost Types
- Stock Locations
- Admin Contacts
- Templates
- Holidays
- Payroll
- Reports
- Knowledge Base
- TaskTrak
- TimeTrak Client Portal
- About TimeTrak

Name	Description
1.0 JSA-SWMS Review	ECG
2.0 JSA-SWMS	ENERGY - DEFIB
CALIBRATION CERTIFICATE	Likelihood
Checkout Checklist	NIBP PRESSURE
Copy of CALIBRATION CERTIFICATE	NZS 3551 ELECT SAFETY
	PACING
	PULSE OXIMETRY (SPO2 Results)
	Safe Work Method Statement
	Significance
	SOFTWARE VERSION
	TEMP
Work Steps	

Show Partial Checklists

User: Administrator

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.

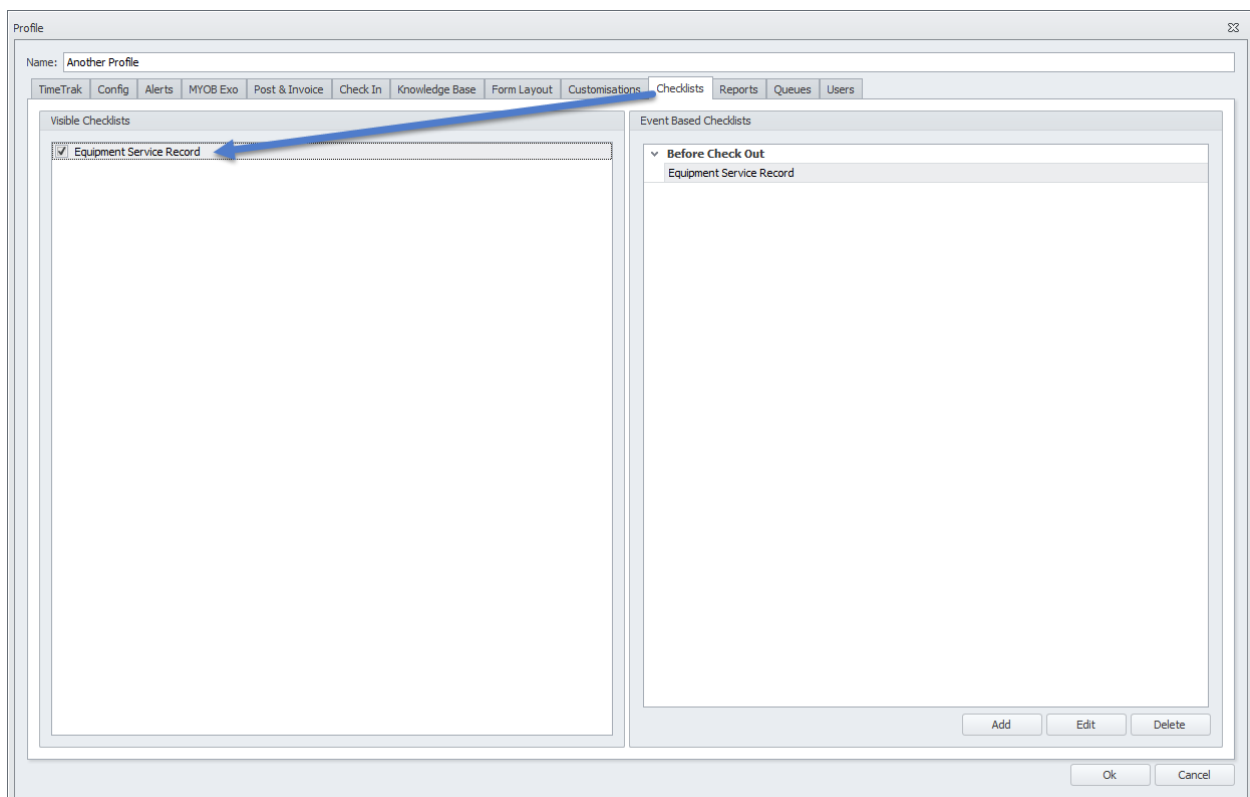
Enabling a Checklist against a Profile

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.

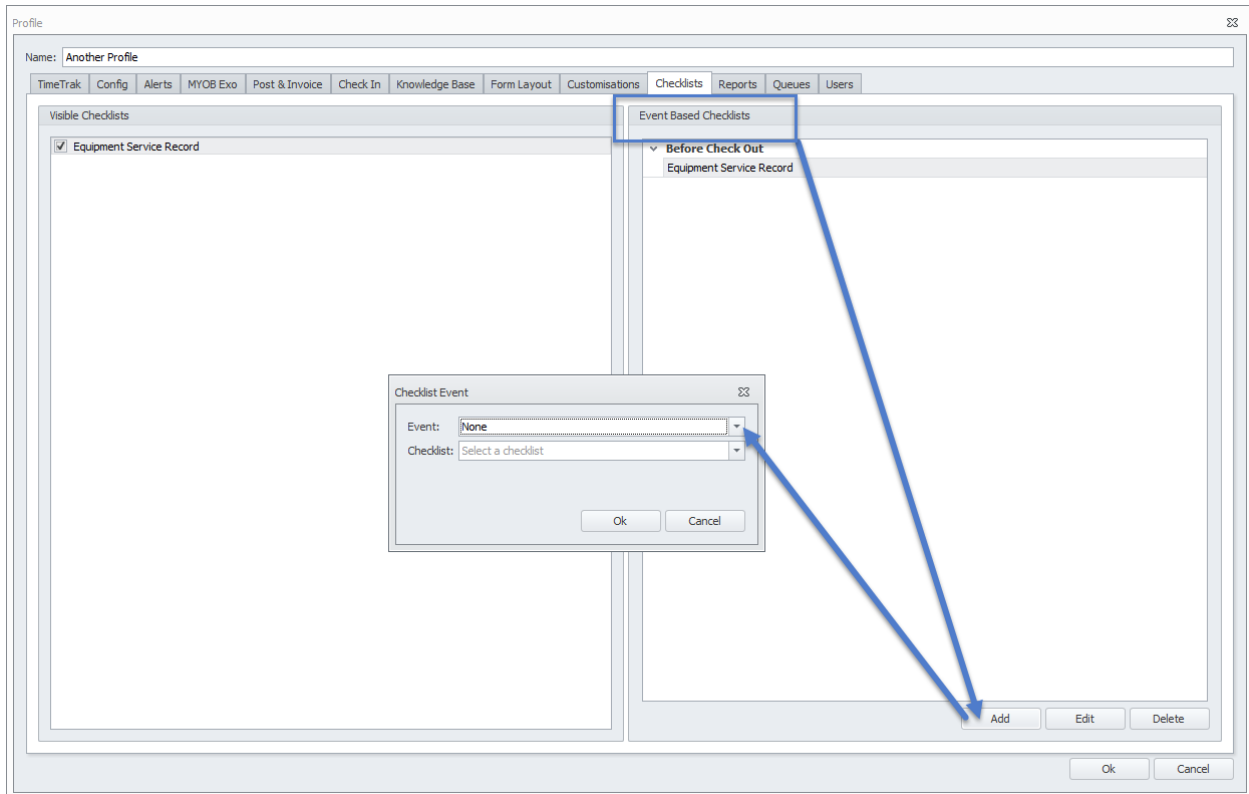
In the left panel, tick on the Checklists that need to be visible against the Job.



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:

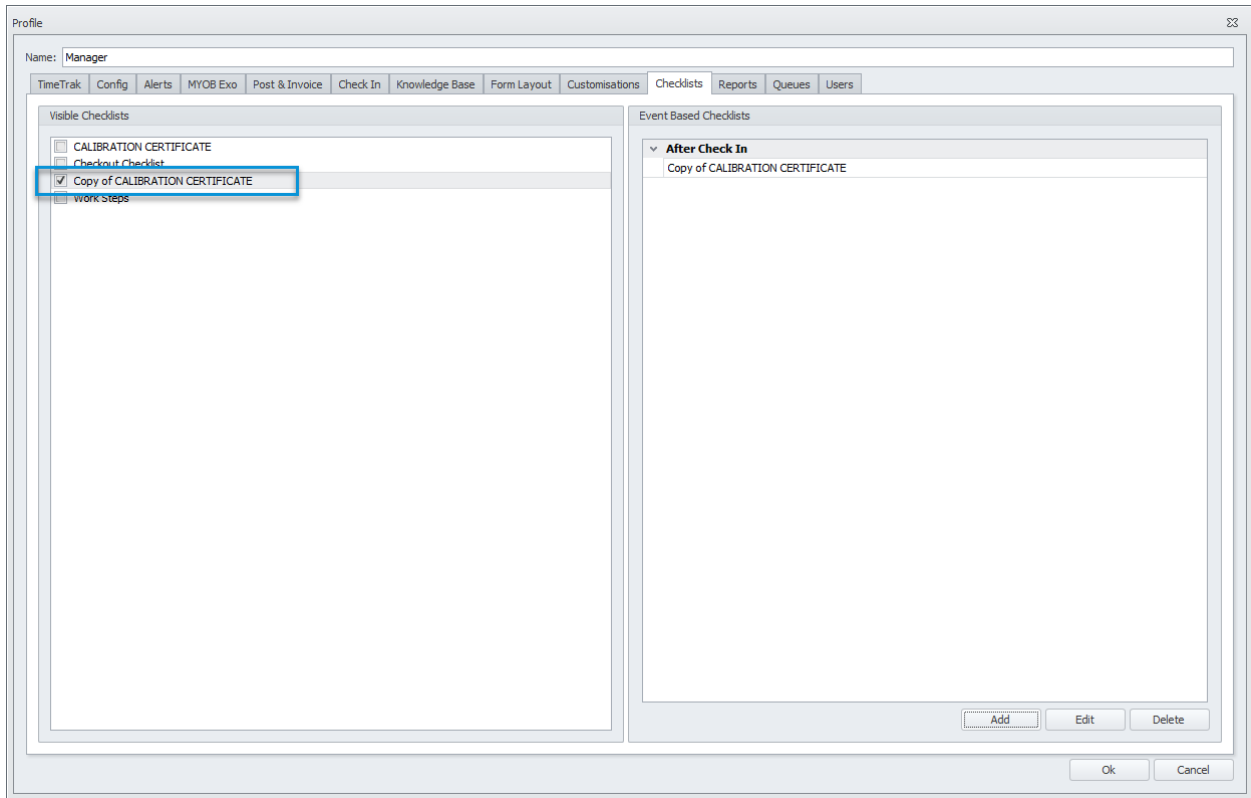
- After Start Travelling
- After Check In
- Before Check Out
- After Add Time Entry
- After Add Disbursement
- After Task Completed
- Before Post
- On Suspend
- After Add Client
- After Add Job
- After Add Appointment
- After Add Serviceable Unit

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.

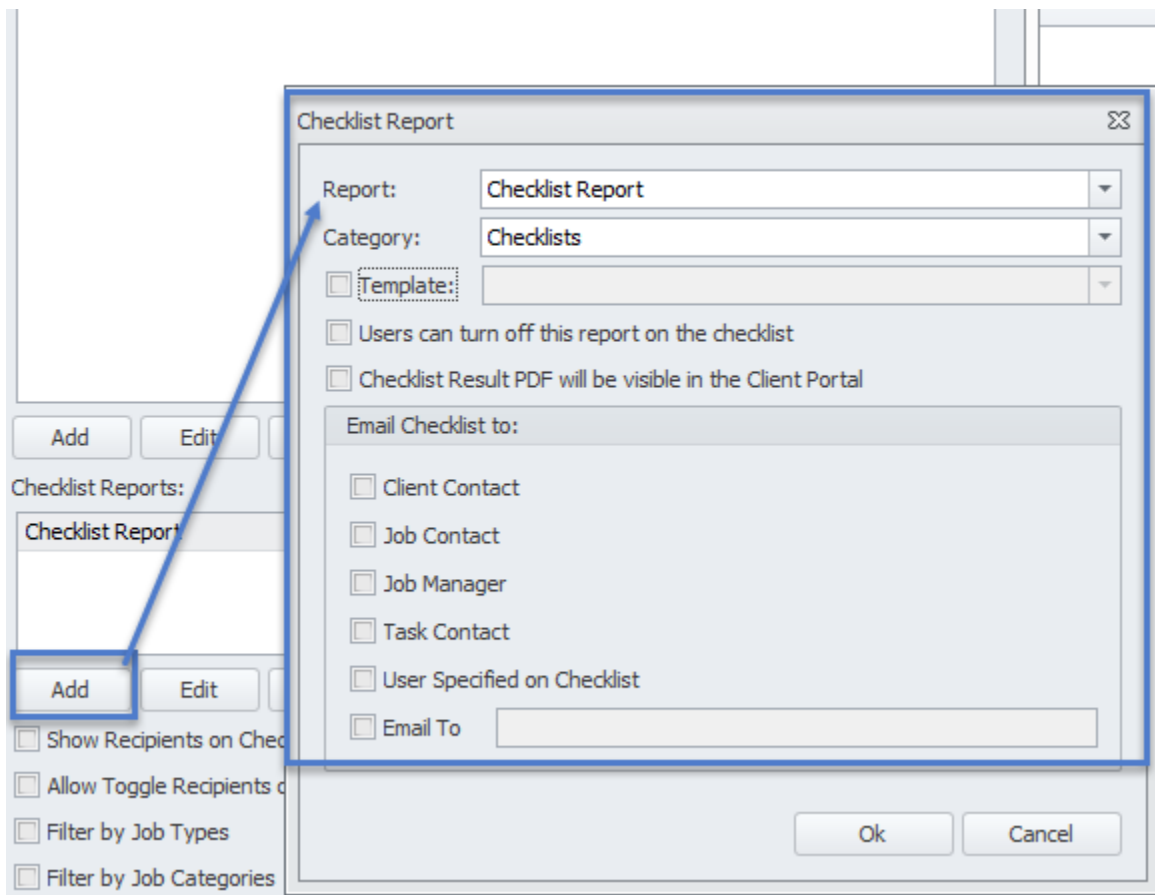
© These files have been compiled by Exosoft and may not be reproduced without our express permission.

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.



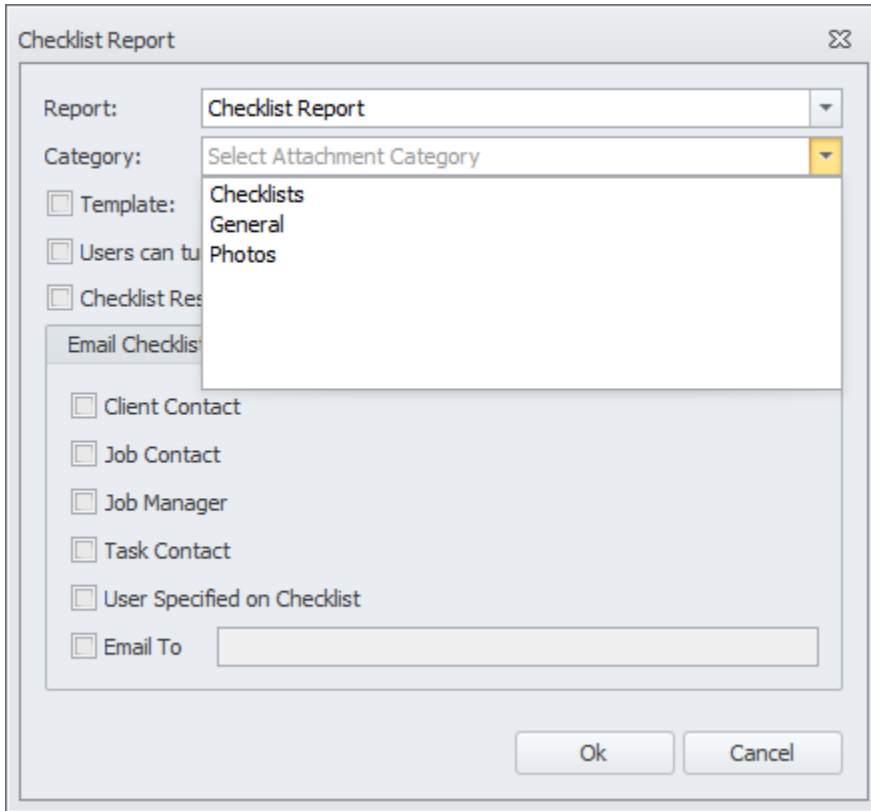
Also to keep in mind that if you want the Checklist to be saved as a draft, the Checklist must be ticked on to made visible in TimeTrak Mobile. If the Checklist hasn't been made a "Visible Checklist" and the Checklist is only event based, users are still able to save as draft but they can't access the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

Checklist Report Settings



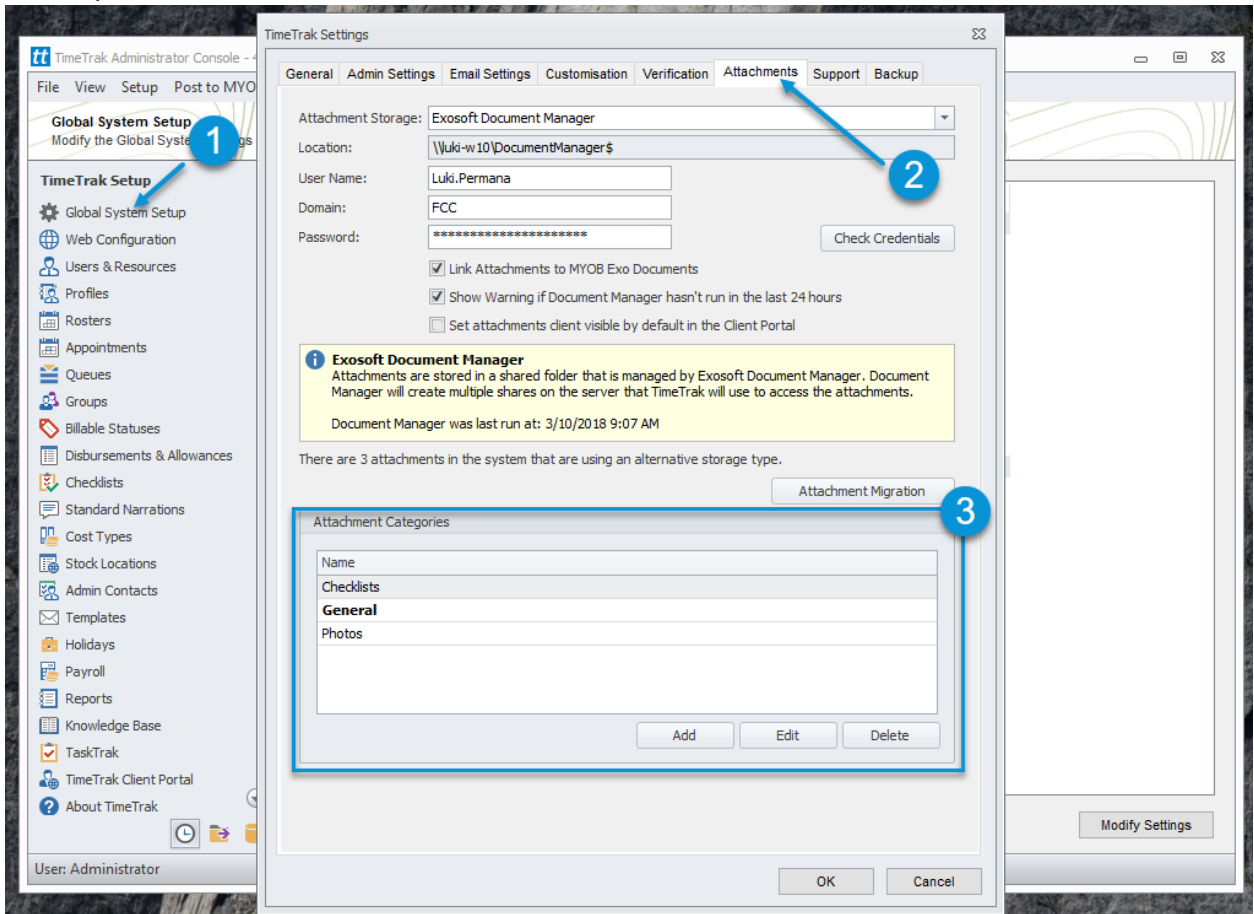
Checklist can be created as a report document that you can review when it is submitted. Since the checklist can be created as a form, you can see and print the document as PDF file. In here, you can assign the Checklist into a Checklist Report as default or a report that you created.

- [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

Checklist

Name:

Save Behaviour:

Checklist Items:

- TESTS RELATE TO ITEMS
- ECG
- DEFIBRILLATION
- NIBP
- SPO2
- PACING
- SOFTWARE
- TEMP
- ELECT SAFETY TESTING
- Signature
- image

Add Edit Delete

Checklist Reports:

Checklist Report

Add Edit Delete

Show Recipients on Checklist

Allow Toggle Recipients on Checklist

Filter by Job Types

Filter by Job Categories

Filter by Job Statuses

Ok Cancel

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

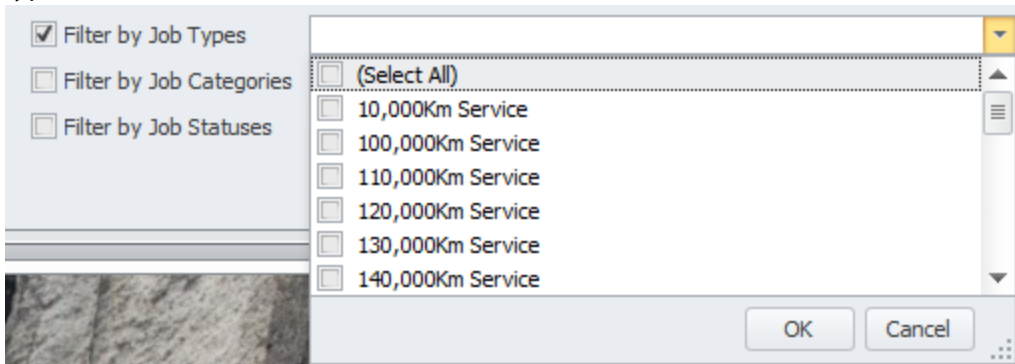
On completing the Checklist, the Mobile user can see that the results of the Checklist are going to be emailed to "testing@test.com"

- **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.

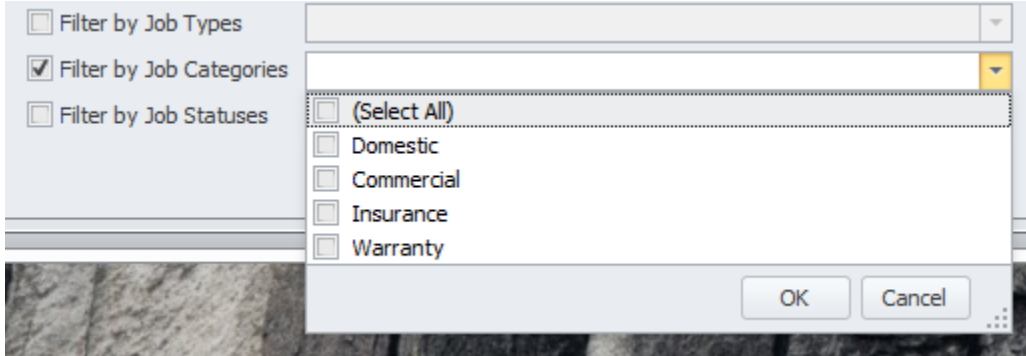
- **Filter by Job Types**

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



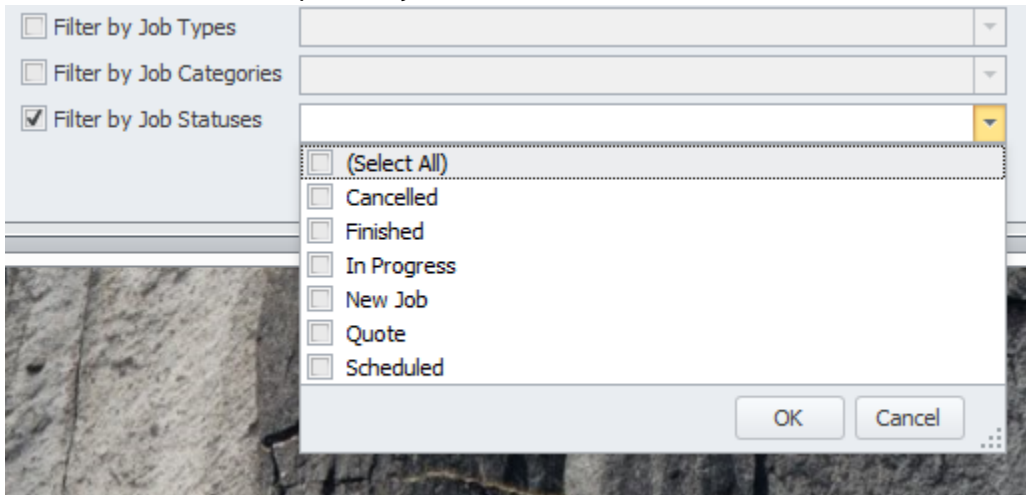
- **Filter by Job Categories**

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.

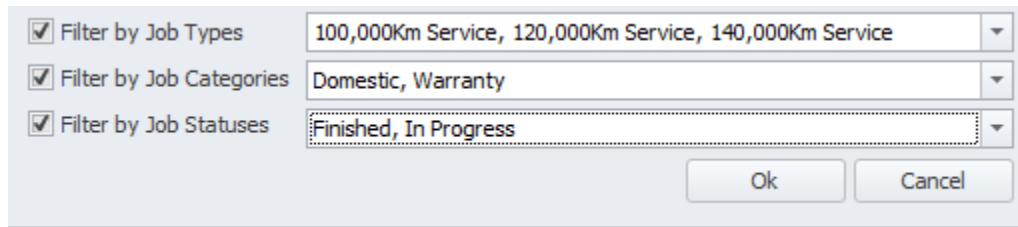


These settings are useful, especially if you want to set your Checklists based on job criteria.

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.



The image shows a dialog box with three filter options, each with a checked checkbox and a dropdown menu. The first option is "Filter by Job Types" with a dropdown containing "100,000Km Service, 120,000Km Service, 140,000Km Service". The second option is "Filter by Job Categories" with a dropdown containing "Domestic, Warranty". The third option is "Filter by Job Statuses" with a dropdown containing "Finished, In Progress". At the bottom right of the dialog box are two buttons: "Ok" and "Cancel".