

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 <u>Checklist</u> 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.

TimeTrak Setup		
🔅 Global System Setup	Enter text to search Find Clear	
Web Configuration	Name	
S Users & Resources	Y General	4
Profiles	Adjusted Target Productivity Report	~
Rosters	AppointmentsForUserSummary	×
Appointments	Average Daily Productivity	~ ;
Oueues	Checklist Report	~
Groups	E Client Task Summary	~
	🖊 🔚 Cost Group Summary Report	~
Billable Statuses	Cost Type Summary Report	~
Disbursements & Allowances	Custom Non Productive Analysis Report	~
🕽 Checklists 🖊	Customer Approval Report	~
Standard Narrations	Detailed Job Report	~
Cost Types	Disbursements By Job	~
	Disbursements By User	~
Stock Locations	Disbursements Report	~
Admin Contacts	Holidays	~
🗹 Templates 🛛	Hours Worked Report	~
Holidays	Job Billing Summary	~
Payroll	Job Billing Summary (Custom)	~
Reports	Job Budget Client Summary	

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.

figur
A Resou
Resol
Entry hout is search
Name Category
✓ Checklists
ents 🗹 Checklist Report General
Checklist Report_ServiceableUnitsNotEnabled General
✓ General
Status Client Purchases By Stock Group Electronic Client Sales Report
Ement Client Sales Report
its Clock On/Off Report
d Narr Opportunity Quote
rd Narr Opportunity Quote
Purchase Order Details
Cation Serviceable Unit History General
ontac User Setup Report
ES Users General
Work Verification
✓ Jobs

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

tt TimeTrak Administrator Console - 4.0_Tes		. e x
File View Setup Post to MYOB Exo	Help	
Reports Setup the TimeTrak Reports		
TimeTrak Setup	Report 23	
🔅 Global System Setup	E General Permissions	
Web Configuration		
💫 Users & Resources	Select the profiles that will have access to this report:	
😨 Profiles	Select All Employee	~
Rosters	V Manager	~
Appointments	Sales	~
Pueues Queues		
🛃 Groups		<u> </u>
🚫 Billable Statuses		~
Disbursements & Allowances		×
🕄 Checklists		~
📃 Standard Narrations		✓
🏪 Cost Types		~
Stock Locations		<u> </u>
K Admin Contacts		- C
🖂 Templates		- ·
📴 Holidays		×
🔁 Payroll		~
E Reports		~
Knowledge Base	Ok Cancel	~
🔁 TaskTrak		
🔓 TimeTrak Client Portal	Job Task Summary	· · ·
 ? About TimeTrak 	Add Edit Delete Import Reports Report Delete	esigner
User: Administrator		

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 <u>Setting up a Checklist Report</u> for this set up.

Checklist	23
Name:	
Save Behaviour Save	-
Checklist Items:	
Add Edit Delete	
Cheddist Reports:	
	ר
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	5

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.

Chedklist S				
Name:				
Enter the check	Enter the checklist name			
Save Behaviour Save				
Checklist Items:	Save Save as Draft + Save Save as Draft + Delete Draft + Save			
	Save as brant + belete brant + Save			

Add in at least one Checklist Item.

Select the <u>Checklist Report</u>.

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.

Re	Report S			23
	General	ssions		_
	Name:	Checklist Report		
	File Name:	ChecklistReport.repx		
	Category:	General		•
	Report Type:	Checklist		•
	Visibility:	TimeTrak Mobile		•
	-			

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

Report		23
Genera Permissions		
Select the profiles that will ha	ve access to this report:	
Select All		
Administrators		
Default Profile		

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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.

tt TimeTrak Administrator Console - 4.0_Te	
File View Setup Post to MYOB Exo	Help
Profile Setup Add/Edit/Delete TimeTrak Profiles.	jø v
TimeTrak Setup	
🔅 Global System Setup	Name Uses Employee 3
Web Configuration	Manager 2
🕺 Users & Resources	Sales 1
🐼 Profiles 👞 🕢	
Rosters	Poñe 2
Appointments	Name: Manager
Pueues Queues	TimeTrak Config Alerts MYOBExo Post & Invoice Check In Knowledge Base Form Layout Customisations Checklats Reports Queues Users
🕰 Groups	
Silable Statuses	Vable Cheddes 6 Event Based Cheddists 5
Disbursements & Allowances	CAJEMATION CERTIFICATE
Checklists	Checkout Chedist Checkout Chedist
Standard Narrations	Copy of CALIBRATION CERTIFICATE
Cost Types	
Stock Locations	
Admin Contacts	
Holidays	
Payroll	
Reports	Cheddist Event 28 4
Knowledge Base	
TaskTrak	Event: Before Check Out
a TimeTrak Client Portal	Chediat: Checkout Chediat
About TimeTrak	
🖸 🗈 🥛	
User: Administrator	Ok Cancel
Oser: Administrator	
🛫 exonet\$ (\\ftgfs) (X:)	
👳 ftgdownloads (\\ftgnas2) (Z:)	
💣 Network	
	Add Edit Delete
	Ok Canol
25 itoms 1 itom colocted 204 KP	

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 <u>Event Based Checklist</u> 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.

Name:			
JSA			
Save Behaviour Save as Draft + Save			
Checklist Items:			
✓ Hazards	v Hazards		
Assessed t	the flooring is clear of debris		
Add Edit Delete			
Checklist Report	ts:		
Checklist Repor	rt		
Add	Edit Delete		
Show Recipie	ents on Checklist		
Allow Toggle	e Recipients on Checklist		
Filter by Job			
Filter by Job			
Filter by Job			
	Ok Cancel		

- 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.

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- 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	ecklist Item 83		
General Help			
Name:			
Item Type:	Text Box		
Group:	Drop Down List Radio Buttons		
Label Text:	Check Box		
Default Value:	Multi Select		
Validation Text:	Signature Drawing Canvas		
Validation Reg Ex:	· (2)		
	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?

• 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 Wee	kly Mor	nthly Annu	ually U	nlikely
Significance				
Significance *				
Significance *	Minor	Moderate	Major	Significant
Insignificant	Minor	Moderate	Major	Significant
Insignificant Description	Minor	Moderate	Major	Significant
Insignificant	Minor	Moderate	Major	Significant
Insignificant Description	Minor	Moderate	Major	Significant
Insignificant Description	Minor	Moderate	Major	Significant

• 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	

• 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?
Control of the hazard?

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• 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?
No Yes
Likelihood
Likelihood *
Daily Weekly Monthly Annually Unlikely
Significance
Significance *
Insignificant Minor Moderate Major Significant
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.

🗲 Back	😑 Menu	Checklist	0		🔒 Home	1 11 1 10 20 20 20 20 20 20 20 20 20 20 20 20 20					
		_		Open				2	2)		\times
				← → • ↑	■ > This PC > Desl	ktop >	~ Ō	Search D	esktop		Q
TESTS	RELATE TO ITEMS			Drganise 🔻	New folder				•••		?
Examp	ple of CheckBox			🗸 💻 This PC	^	Documentation					
	tem 1			🔰 🧊 3D Object	s	3.2 Admin Console					
				🔰 📃 Desktop		🚮 4.0 Admin Console 🚮 4.1 TimeTrakConsole - Shortcut					
	tem 2			🗧 🔮 Documen	ts	Exosoft SQL Server Backup					
			-	🔰 🦊 Download	İs	1 FortiClient					
- I	tem 3			🔰 👌 Music		Nightly Build 4.0					
			-	🔉 📰 Pictures		Nightly Build 4.1					
-				🔰 🛃 Videos		ReportScheduler.Admin Shortcut Location: 4.1 (C:\apps\timetrak)	1				
Exam	ple of File			🔰 🏪 Local Disk		Software Manager	e.				
					na\$ (\\ftgfs) (H:)						
		Upload file or take photos			\internal.focus.net.r						
					(\\internal.focus.net						
				-	\internal.focus.net.i						
TESTS	RELATE TO ITEMS	;		Suppliers	(\internal.focus.net						
					File name:		~	All Files			~
ECG								Ор	en	Cancel	

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

Hazardous Subs	stances Heighte	(working at)		Doint	
Lifting Equipme	-	Signatur	e	2 0ve	erhead
Pedestrian/Othe				s	harps
Tools Under	grou			Vaste	Disposal
۶E					
ersonal Protectior	n Equ	e Name			
Safety Boots	Safe	Ok	Clear	rest S	ystem
Visibility Vest	Repirator Dus	t mask Prote	ctive Clothing	Eye Protecti	ion
gnature					
4		Signature			

 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.

Drawing	0
focus	
strategy systems support	
3 5 10 15 Clear Import Image	
Testing to upload image in Drawing Canvas	
Ok	

• 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			
Subject			
(I			
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.

Checklist Item			23	
General Help				
Name:	Example of Disbursement			
Item Type:	Disbursement		•	
Group:	TESTS RELATE TO ITEMS		*	
Label Text:	Example of Disbursement			
Disbursement:	STANDARD WINDSHIELD WIPER		x -	
Quantity:	3 ‡			
	Required			
Z Example of Dist	oursement			
STANDARD WINDSHI	ELD 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.

General		
Name:	Example of Partial Checklist	
Item Type:	Partial Checklist	•
Partial Checklist:	Select Partial Checklist	•
	1.0 JSA-SWMS Review	A
	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		23	
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 follo	owing addresses:		
✓ luki.permana@focus.net.nz			
Save as draft			Ø
Save			Ø

• 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		03/10/2	018 08:45 AM				
ECG	Day Tue 02	Month	Year 2017	Hours	Minutes 30		
YES NO	Wed 03		2018		45		
EFIBRILLATION	Thu 04	11	2019	09			
	Se			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.

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ecklist Item		
Name:	Job Step 1	
Item Type:	Text Box	-
Group:	Step 1	·
Label Text:	Job Step 1	
Default Value:		
Validation Text:		
Validation Reg Ex:		- 0
	Required Exclude When Blank	
cklist Item		23
General Help		

General Help		
Put your Step description here		A
		_
	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:

Step 1	
Job Step 1 0	
•	
Any hazard?	
No Yes	
Control of the hazard?	
No Yes	Help
Step 2	Put your Step description here
Job Step 2	ок
Any bazard?	

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:

٧	Step 1	٠
	Job Step 1	
	Hazard	≣
	Control	
¥	Step 2	
	Job Step 2	
	Hazard	
	Control	
Y	Step 3 Job Step 3	
	Job Step 3	Ŧ

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

Step 1
Job Step 1 2
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).

Ch	ecklist Item		23
	General Help		
	Name:	Testing name/field	
	Item Type:	Text Box	-
	Group:	Step 1	·
	Label Text:	Testing name/field	
	Default Value:		
	Validation Text:		
	Validation Reg Ex:		- 3
		Required 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.

Name:		
Item Type:	Drop Down List	-
Group:	TESTS RELATE TO ITEMS	••••
Label Text:		
Data Source Type:	None	•
Default Value:	None	
	Sql	
	List	

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	X	3
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 STOCKCDDE, DESCRIPTION FROM STOCK_ITEMS WHERE ISACTIVE = 'Y' / 2	
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	0
MOBILE TMG AUDIO AMPLIFIER/EQUALISER		
AUDIO EQUIPMENT 12 MTH EXTENDED WARRANTY		
AUDIO EQUIPMENT 24 MTH EXTENDED WARRANTY		
AUDIO EQUIPMENT MANUFACTURER'S WARRANTY		
AM/FM/CD FULL LOGIC CASSETTE PLAYER		
ALPINE DVA-5205 DVD/VCD/CD PLAYER		
ALPINE CR01 DVD/VCD/CD PLAYER		
ALPINE INT01 DVD/VCD/CD PLAYER		
MOBILE 7 BAND AUDIO EQUALISER/AMPLIFIER		
AM/FM FULL LOGIC CASSETTE PLAYER		
CDT AUDIO CAMBRIA CAX400		
P	163	5.72

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:

Checklist Item		23
General Help		
Name:		
Item Type:	Drop Down List	
Group:	TESTS RELATE TO ITEMS	
Label Text:		
Data Source Type:	Sql 🗸	
Data Source:	ELECT SEQNO, UNITNAME FROM SU_MAIN WHERE CUSTOMER_ACCTYPE = 1 AND	
Default Value:		Jobld
	Required Exclude When Blank	ClientId
		Taskld

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.

heddist Item 🛛 🕅			
General Help			
Name:	Clients Serviceable Units		
Item Type:	Drop Down List 🔹		
Group:	TESTS RELATE TO ITEMS		
Label Text:	Clients Serviceable Units		
Data Source Type:	Sql 🗸		
Data Source:	SU_MAIN WHERE CUSTOMER_ACCTYPE = 1 AND CUSTOMER_ACCNO = @ClientId 2		
Default Value:			
	Required Exclude When Blank		

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.

Checklist Item					23
General Help					
Name:	Example of Ch	eckBox			
Item Type:	Check Box				-
Group:	TESTS RELATE	TO ITEMS			-
Label Text:	Example of Ch	eckBox			
Data Source Type:	List				-
Data Source:	Caption	Value	Checklist		
	Item 1	1	None		
	Item 2	2	None		
	Item 3	3	None		
		Move Up	Move Down	Add	Delete
Default Value:					
	Required	Exclude When Blank			
				Ok	Cancel

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

ecklist Item				
General Help				
Name:	Hazard			
Item Type:	Radio Buttons			-
Group:	Step 1			•
Label Text:	Any hazard?			
Data Source Type:	List			•
Data Source:	Caption	Value	Checklist	
	No	No	None	
	Yes	Yes	Likelihood	

tt TimeTrak Administrator Console - 4.0_	Test
File View Setup Post to MYOB Ex	ko Help
Checklist Setup Add/Edit/Delete TimeTrak Checklists.	
TimeTrak Setup	
🗰 olehel Sustan Setur	Name
Global System Setup	1.0 JSA-SWMS Review
Web Configuration	2.0 JSA-SWMS
😞 Users & Resources	CALIBRATION CERTIFICATE
🕵 Profiles	Checkout Checklist
Rosters	Copy of CALIBRATION CERTIFICATE
Appointments	Description
	ECG
Queues	ENERGY - DEFIB
🖧 Groups	Likelihood
🗞 Billable Statuses	NIBP PRESSURE
Disbursements & Allowances	NZS 3551 ELECT SAFETY
	PACING
Standard Narrations	PULSE OXIMETRY (SPO2 Results)
-	Safe Work Method Statement
Cost Types	Significance
Stock Locations	SOFTWARE VERSION
Admin Contacts	TEMP
I Templates	Work Steps

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.

Caption	Value	Checklist	
No	No	None	
Yes	Yes	Likelihood	Client Email Address Job Contact Task Contact Job Manager
			Email to:

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.

Data Source:	Caption	Value	Checklist		
	No	No	None		\boxtimes
	Yes	Yes	Likelihood		\bowtie
		Move Up Mo	ve Down	Add	Delete
Default Value:	No				
	Required Exc	ude 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	Ø
Save	٥

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).

hecklist		23
Name:		
Copy of CALIBRATION C	RTIFICATE	
Save Behaviour Save as)raft + Save	 •
Checklist Items:		_
Example of File		-
Example of Drawing	Canvas	
Example of Job Histo	ry Note	
Example of Debtor H		
Example of Disburse	nent	
Example of Servi	Add	
Example of Date	Edit	
STOCK_ITEM	Сору	 =
Clients Serviceat	Delete	
Add Edit	Move Up	
	Move Down	
Checklist Reports:	more bown	
Checklist Report		

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			23
General Help			
Name:			
Item Type:	Disbursement	-	
Group:	TESTS RELATE TO ITEMS	-	
Label Text:	Example of Disbursement		
Disbursement:	STANDARD WINDSHIELD WIPER	х -	
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).

tt TimeTrak Administrator Console - 4.0_Te	st	- 0 %
File View Setup Post to MYOB Exo	Help	
Checklist Setup Add/Edit/Delete TimeTrak Checklists.		
TimeTrak Setup	[
🔅 Global System Setup	Name	
Web Configuration	1.0 JSA-SWMS Review	
•	2.0 JSA-SWMS	
Sers & Resources	CALIBRATION CERTIFICATE	
🕵 Profiles	Checkout Checklist	
Rosters	Copy of CALIBRATION CERTIFICATE	
Appointments	Description	
Queues	ECG ENERGY - DEFIB	
🛃 Groups	ENERGY - DEF18	
S Billable Statuses	NIBP PRESSURE	
	NLBP PRESSURE NZS 3551 ELECT SAFETY	
Disbursements & Allowances	PACING	
🕄 Checklists	PACING PULSE OXIMETRY (SPO2 Results)	
戸 Standard Narrations	Safe Work Method Statement	
P Cost Types	Significance	
Ta Stock Locations	SOFTWARE VERSION	
Admin Contacts	TEMP	
Templates	Work Steps	
Holidays	Add	
	Edit	
🚰 Payroll		
Reports	Delete	
Knowledge Base	Сору	
🔽 TaskTrak	Export	
🔓 TimeTrak Client Portal		
About TimeTrak		
🕑 🔁 🧧	Add 💌 Edit Delete 🖉 Show Partial Checklists	Import
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

Profile	23
Name: Another Profile	
TimeTrak Config Alerts MYOB Exo Post & Invoice Check In Knowledge Base Form Layout Customisations Checklists Reports Queues Users	
Visible Checklists Event Based Checklists	
C Equipment Service Record V Before Check Out	
Equipment Service Record	
Cheddist Event 23 Event: None Cheddist: Select a cheddist Ok Cance	
Add Ed	dit Delete
	Ok Cancel

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.

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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.

Profile	8
Name: Manager	
TimeTrak Config Alerts MYOB Exo Post & Invoice Check In Knowledge Base Form Layout Customisati	ons Checklists Renorts Queues Lisers
Visible Checklists	Event Based Checklists
CALIBRATION CERTIFICATE	✓ After Check In
Copy of CALIBRATION CERTIFICATE	Copy of CALIBRATION CERTIFICATE
V COPY OF CALIBRATION CERTIFICATE	
	Add Edit Delete
	Ok Cancel

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 Report	23
	Report: Checklist Report	-
	Category: Checklists	-
	Template:	~
	Users can turn off this report on the checklist	
	Checklist Result PDF will be visible in the Client Portal	
Add Edit	Email Checklist to:	
Checklist Reports:	Client Contact	
Checklist Report	Job Contact	
	Job Manager	
	Task Contact	
Add Edit	User Specified on Checklist	
Show Recipients on Chec	Email To	
Allow Toggle Recipients o		
Filter by Job Types	Ok	ancel
Filter by Job Categories		

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'.

	23
Checklist Report	-
Select Attachment Category	-
Checklists General	
Photos	
tact	-11
ict	
ger	
act	
ified on Checklist	
Ok Cancel	
	Select Attachment Category Checklists General Photos tact tact ct ger act ified on Checklist

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

Add as per below:

	meTrak Settings		23	
tt TimeTrak Administrator Console - 4	General Admin Setting	s Email Settings Customisation Verification Attac	hments Support Backup	
File View Setup Post to MYO	General Admin Setung	s Email Setungs Customisation Vernication Adde	Заррон Васкар	
Global System Setup	Attachment Storage:	Exosoft Document Manager	-	
Modify the Global Syste gs	Location:	\\uki-w10\DocumentManager\$		
TimeTrak Setup	User Name:	Luki.Permana	2	
Global System Setup	Domain:	FCC	-	
Web Configuration	Password:	******	Check Credentials	
🕺 Users & Resources		✓ Link Attachments to MYOB Exo Documents		
😨 Profiles		Show Warning if Document Manager hasn't run in th	e last 24 hours	
Rosters		Set attachments dient visible by default in the Client		
Appointments	Exosoft Docu	nent Manager		
Queues	Attachments are	stored in a shared folder that is managed by Exosoft D		
🛃 Groups	Manager will cre	ate multiple shares on the server that TimeTrak will use	to access the attachments.	
Sillable Statuses	Document Mana	ger was last run at: 3/10/2018 9:07 AM		
Disbursements & Allowances	There are 3 attachme	nts in the system that are using an alternative storage t	type.	
Checklists			Attachment Migration	
🗩 Standard Narrations	Attachment Catego	ries	3	
Cost Types			Y	
Stock Locations	Name			
Admin Contacts	Checklists			
Templates	General			
💼 Holidays	Photos			
Payroll				
E Reports				
Knowledge Base		Add	Edit Delete	
TaskTrak				
TimeTrak Client Portal				
About TimeTrak				Modify Settings
🕒 🔁 🧧				moony settings
User: Administrator			OK Cancel	
ALCONTRACTOR OF A DECK			Calicer	

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

cklist					£
lame:					
Copy of CALIB	RATION CERT	IFICATE	 		
ave Behaviour					*
Checklist Items:		int i buite			
 TESTS RE 		MC	 	 	
ECG	LATE TO TH	CP15			î
DEFIBRILL	ATION				
NIBP					===
SPO2					
PACING					
SOFTWAR	ε				
TEMP					
	FETY TESTING	6			
Signature					
image					
Add hecklist Report		Delete			
	rt				
Checklist Repo					
Checklist Repo	Edit	Delete			
Add	Edit ents on Ched				
Add Show Recipi	ents on Ched	dist			
Add Show Recipi	ents on Ched Recipients o	dist			
Add Show Recipi	ents on Check Recipients of Types	dist			
Add	ents on Ched Recipients of Types Categories	dist			· · · · · · · · · · · · · · · · · · ·
Add Show Recipi	ents on Ched Recipients of Types Categories	dist			

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 <u>testing@test.com</u>"

Checklist Report		23		
Report:	Checklist Report	-		
Category:	Select Attachment Category	-		
Template:		-		
🔲 Users can t	urn off this report on the checklist			
Checklist Re	esult PDF will be visible in the Client Portal			
Email Checkli	st to:			
Client Co	ntact			
🔲 Job Cont	act			
🔲 Job Mana	ager			
Task Con	Task Contact			
User Spe	User Specified on Checklist			
🔽 Email To	Testing@test.com			
	Ok Cance			

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

E	mail Options:
٦	This checklist will be emailed to the following addresses:
	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 Types		•
Filter by Job Categories	C (Select All)	-
Filter by Job Statuses	10,000Km Service	≣
The by 500 statuses	100,000Km Service	
	110,000Km Service	
	120,000Km Service	
	130,000Km Service	
The second second	140,000Km Service	•
	OK Cancel	

• 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 Job Types		Ŧ
Filter by Job Categories		•
Filter by Job Statuses	C (Select All)	
	Domestic	
	Commercial	
	Insurance	
	Warranty	
	OK Cancel	

• 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.

		_
Filter by Job Types		
Filter by Job Categories		
✓ Filter by Job Statuses		
	C (Select All)	
	Cancelled	
	Finished	
Constant of the second of the	In Progress	10
	New Job	5
H. L. M.	Quote	3
1 1 m	Scheduled	1
	OK Cancel	COMPLEX IN
Edite /		States

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.

✓ Filter by Job Types	100,000Km Service, 120,000Km Service, 140,000Km Service		
▼ Filter by Job Categories	Domestic, Warranty	-	
☑ Filter by Job Statuses	Finished, In Progress		
	Ok Cancel		