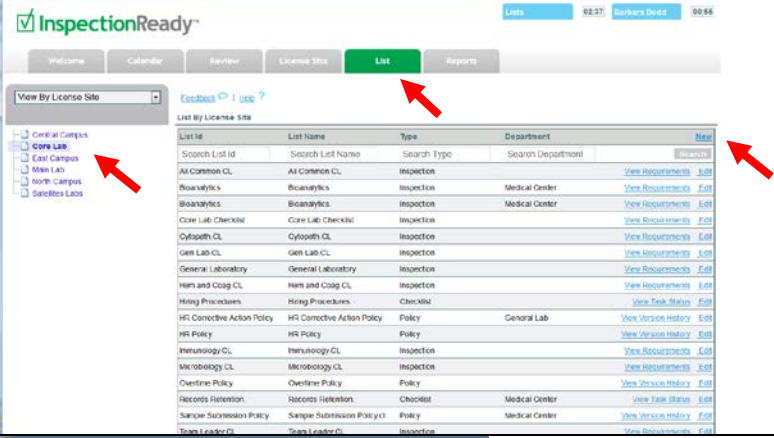
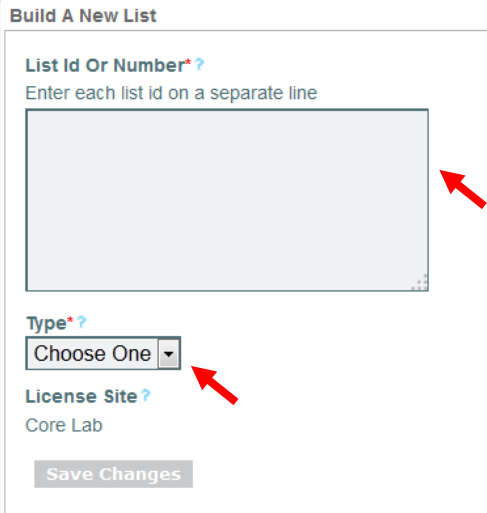
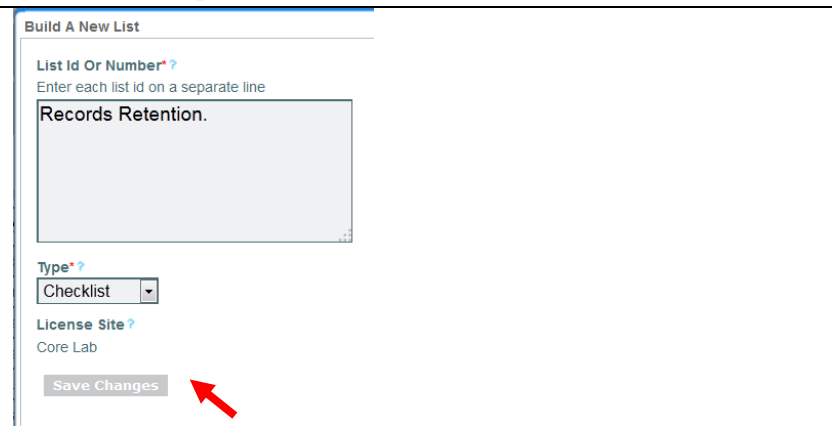
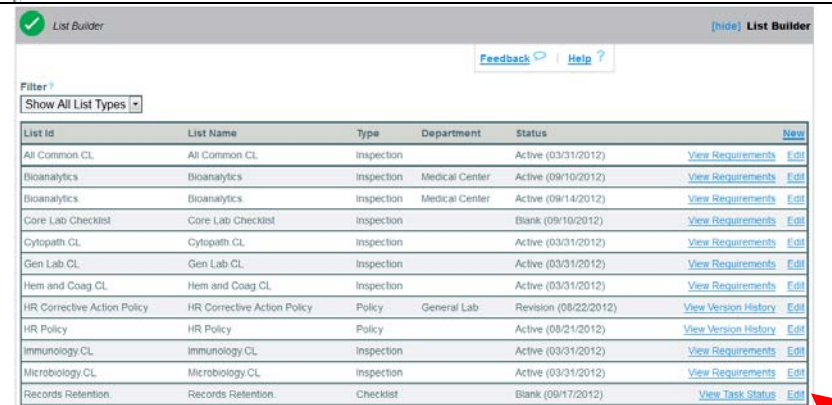
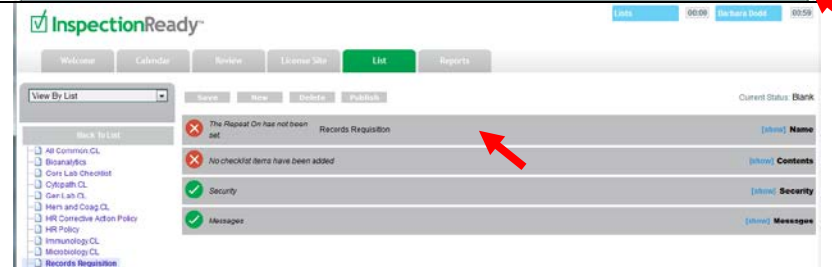
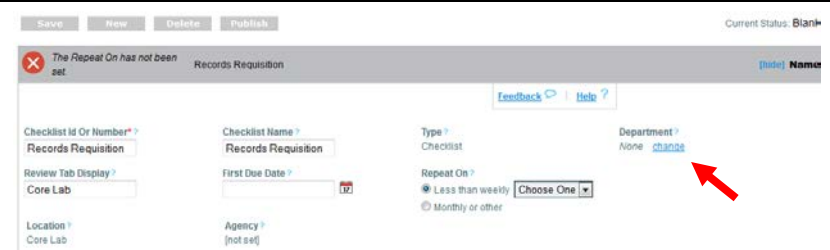
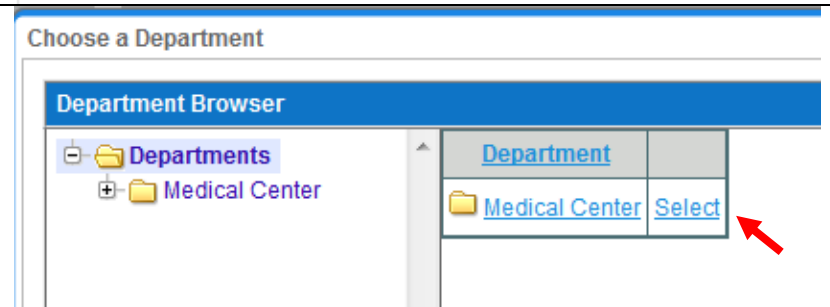
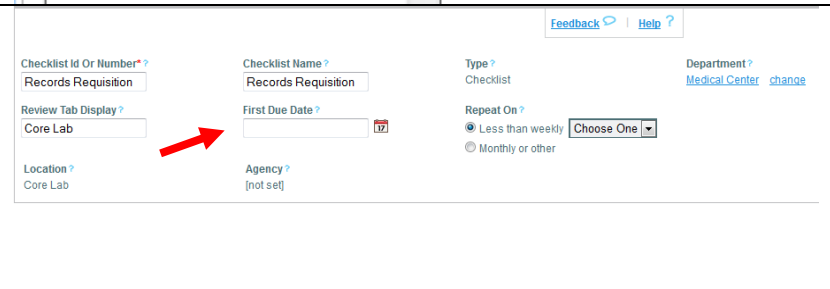

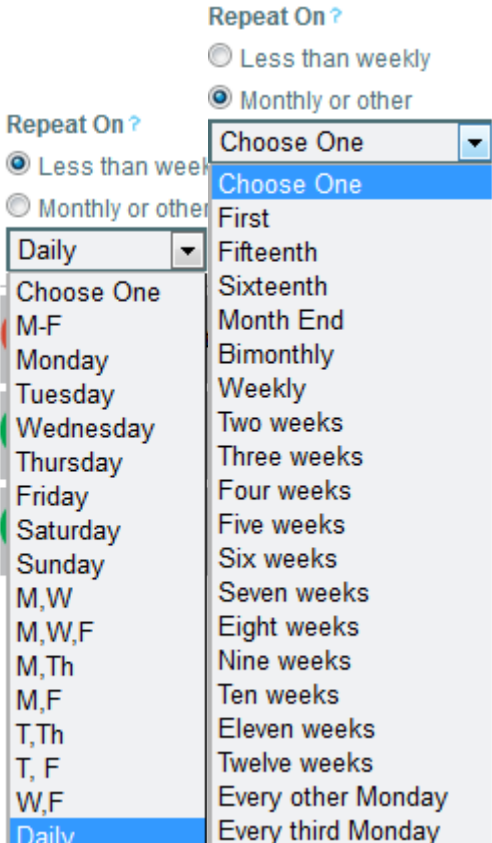


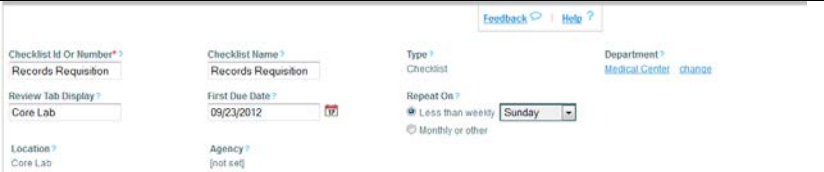
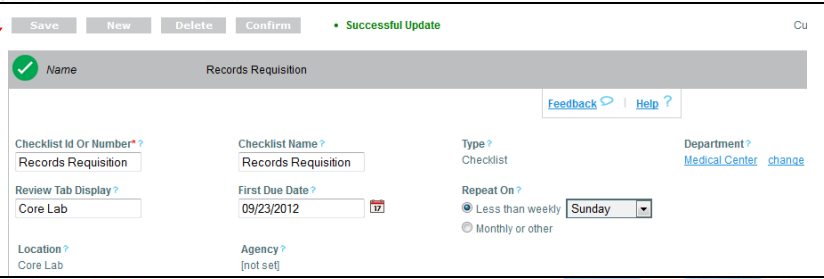
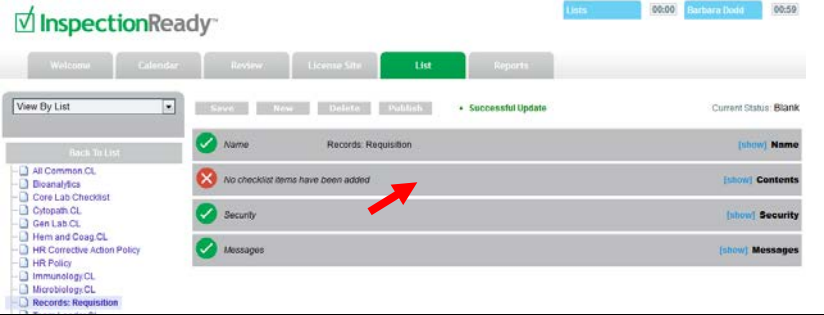
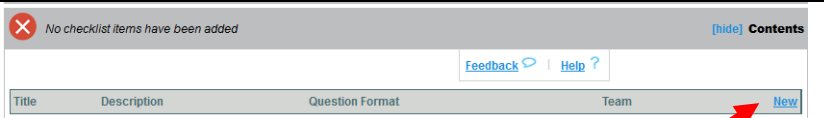
Checklist - Overview

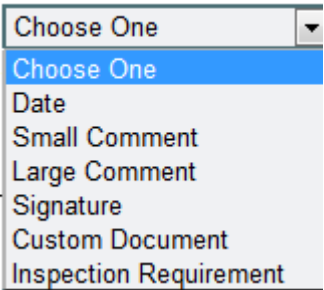

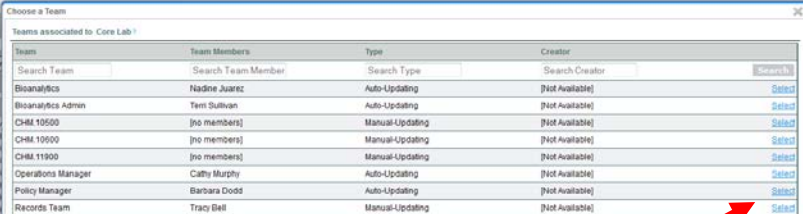
Step	Action
1.	<p>Navigate to the List Tab.</p> <p>Select the Site you want to work in, and in this example, we will be working in Core Lab License Site.</p> <p>In this example, we will be creating a new Checklist.</p> <p>Select New</p>
	
2.	<p>In the Build a New List window, type the List ID or Number for the new Checklist.</p> <p>Select Checklist as the Type in the drop-down menu.</p>
	

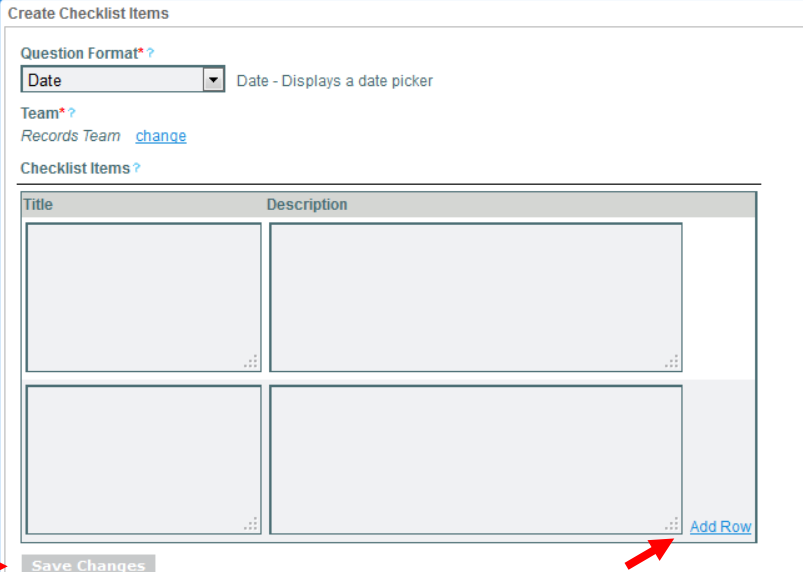
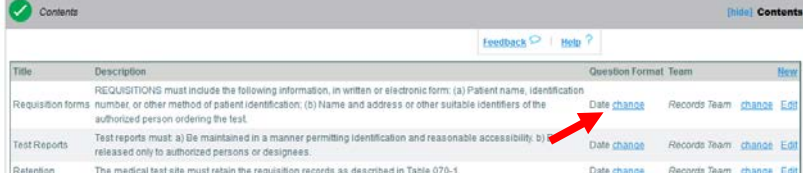
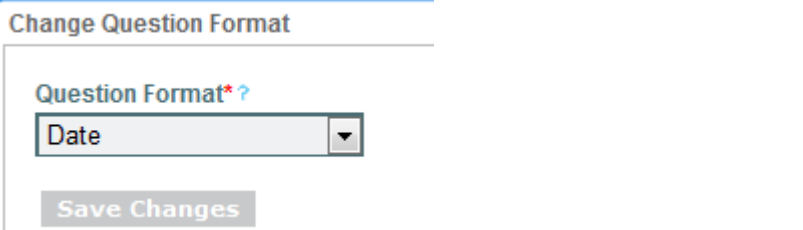
<p>3. Select Save Changes.</p>																																																																															
<p>4. Select Edit for the Records Retention Checklist.</p>	 <table border="1"> <thead> <tr> <th>List Id</th> <th>List Name</th> <th>Type</th> <th>Department</th> <th>Status</th> <th></th> </tr> </thead> <tbody> <tr> <td>All Common CL</td> <td>All Common CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Bioanalytics</td> <td>Bioanalytics</td> <td>Inspection</td> <td>Medical Center</td> <td>Active (09/10/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Bioanalytics</td> <td>Bioanalytics</td> <td>Inspection</td> <td>Medical Center</td> <td>Active (09/14/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Core Lab Checklist</td> <td>Core Lab Checklist</td> <td>Inspection</td> <td></td> <td>Blank (09/10/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Cytopath CL</td> <td>Cytopath CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Gen Lab CL</td> <td>Gen Lab CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Hem and Coag CL</td> <td>Hem and Coag CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>HR Corrective Action Policy</td> <td>HR Corrective Action Policy</td> <td>Policy</td> <td>General Lab</td> <td>Revision (08/22/2012)</td> <td>View Version History Edit</td> </tr> <tr> <td>HR Policy</td> <td>HR Policy</td> <td>Policy</td> <td></td> <td>Active (08/21/2012)</td> <td>View Version History Edit</td> </tr> <tr> <td>Immunology CL</td> <td>Immunology CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Microbiology CL</td> <td>Microbiology CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Records Retention</td> <td>Records Retention</td> <td>Checklist</td> <td></td> <td>Blank (09/17/2012)</td> <td>View Task Status Edit</td> </tr> </tbody> </table>	List Id	List Name	Type	Department	Status		All Common CL	All Common CL	Inspection		Active (03/31/2012)	View Requirements Edit	Bioanalytics	Bioanalytics	Inspection	Medical Center	Active (09/10/2012)	View Requirements Edit	Bioanalytics	Bioanalytics	Inspection	Medical Center	Active (09/14/2012)	View Requirements Edit	Core Lab Checklist	Core Lab Checklist	Inspection		Blank (09/10/2012)	View Requirements Edit	Cytopath CL	Cytopath CL	Inspection		Active (03/31/2012)	View Requirements Edit	Gen Lab CL	Gen Lab CL	Inspection		Active (03/31/2012)	View Requirements Edit	Hem and Coag CL	Hem and Coag CL	Inspection		Active (03/31/2012)	View Requirements Edit	HR Corrective Action Policy	HR Corrective Action Policy	Policy	General Lab	Revision (08/22/2012)	View Version History Edit	HR Policy	HR Policy	Policy		Active (08/21/2012)	View Version History Edit	Immunology CL	Immunology CL	Inspection		Active (03/31/2012)	View Requirements Edit	Microbiology CL	Microbiology CL	Inspection		Active (03/31/2012)	View Requirements Edit	Records Retention	Records Retention	Checklist		Blank (09/17/2012)	View Task Status Edit
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<p>5. Select the Name color bar.</p>																																																																															

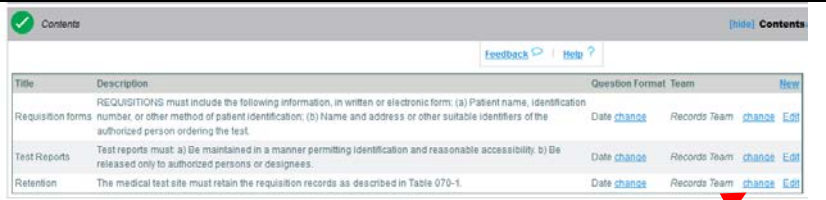
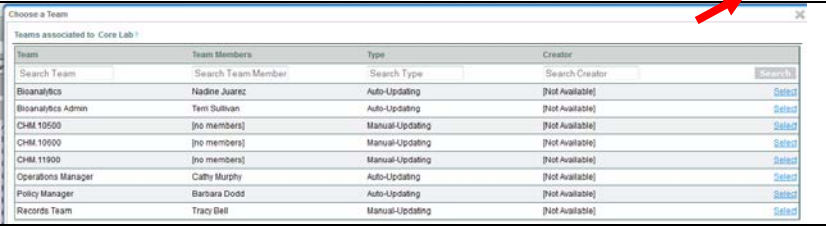

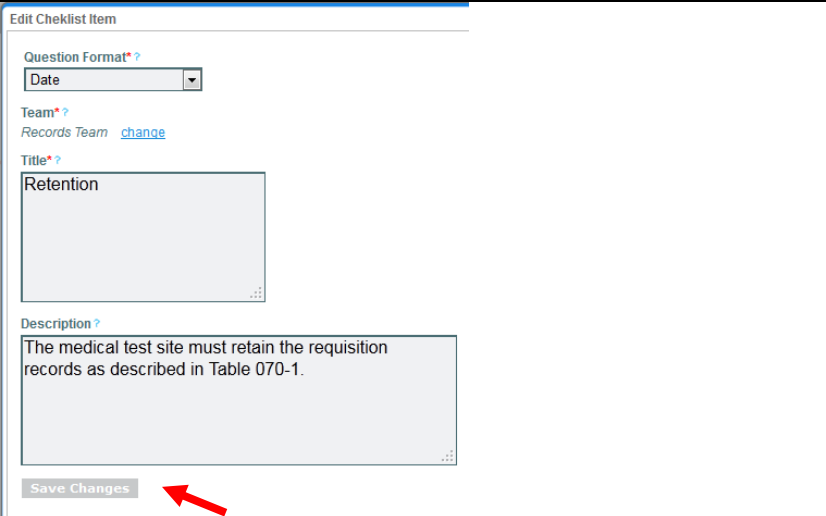
<p>6.</p>	<p>The Name color bar shows you the Checklist ID or Number, the Checklist Name, and Type of List.</p> <p>If you would like to add a Department, select Change link.</p>	
<p>7.</p>	<p>In the Choose a Department window, choose Select.</p>	
<p>8.</p>	<p><u>The Review Tab Display</u>: As list tasks are assigned, employees may view them on the Review Tab. This value will show in the Subject column on the Review Tab.</p> <p><u>First Due Date</u>: This field is the date that the checklist tasks should start rolling out. At the Calendar picker, select the date you want to use. We have selected September 23, 2012.</p>	

9.	The <u>Repeat On</u> field determines when the tasks for the checklist roll-out. Changing the radio button filters the list of patterns in the drop-down.	
10.	<p>You have the option of selecting Less than weekly or Monthly or other.</p> <p>For our example, we will Select Less than weekly and choose Sunday.</p>	

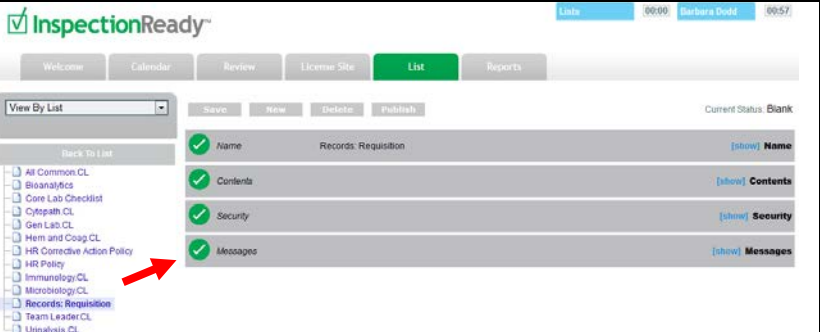

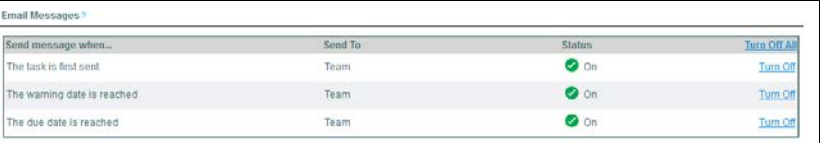
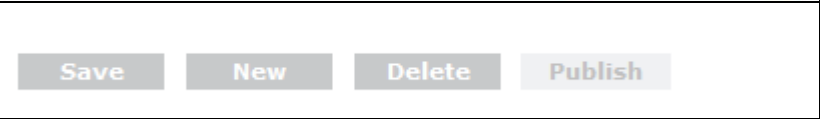

11.	The Location field is the location that the checklist is associated to. This is typically the primary location of the License Site.	
12.	Select Save .	
13.	Select the Contents color bar to expand.	
14.	Select New to add a Checklist.	

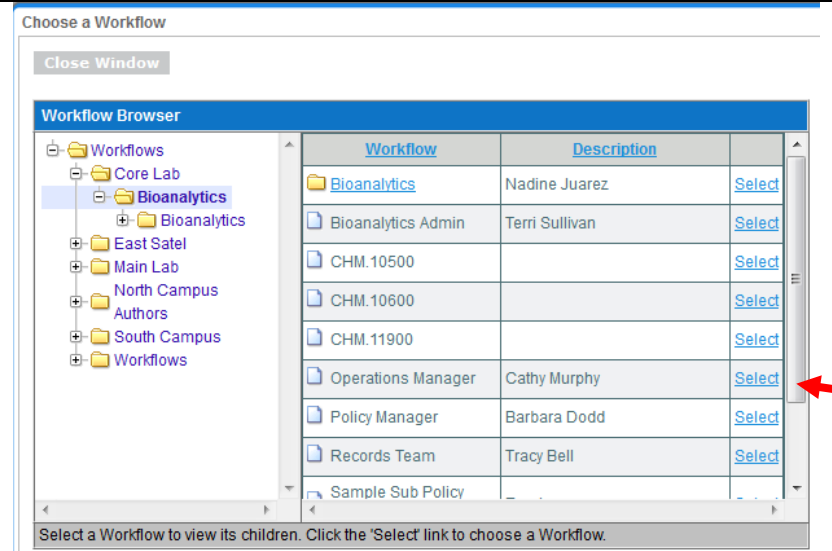

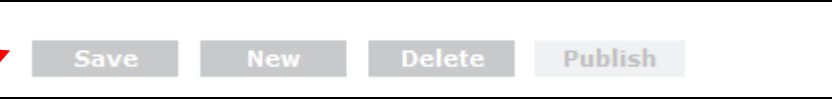
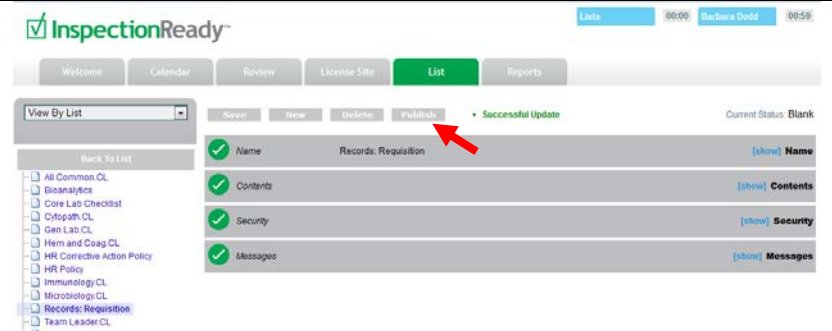
<p>15.</p>	<p>The Question Format field sets the type of control to be used to complete the checklist items listed below.</p> <p>For our example, we will select Date.</p>	<p>Question Format*?</p> 																																																		
<p>16.</p>	<p>The Team is a workflow of employees that are used to complete tasks. They are created in the License Site Tab.</p> <p>To change the team, select Change.</p>	<p>Team*</p> <p>Core Lab change</p> 																																																		
<p>17.</p>	<p>We have chosen the Records Team.</p> <p>Choose Select.</p>	 <table border="1"> <thead> <tr> <th>Team</th> <th>Team Members</th> <th>Type</th> <th>Creator</th> <th></th> </tr> </thead> <tbody> <tr> <td>Search Team</td> <td>Search Team Member</td> <td>Search Type</td> <td>Search Creator</td> <td>Select</td> </tr> <tr> <td>Bioanalytics</td> <td>Nadine Jarenc</td> <td>Auto-Updating</td> <td>[Not Available]</td> <td>Select</td> </tr> <tr> <td>Bioanalytics Admin</td> <td>Teri Sullivan</td> <td>Auto-Updating</td> <td>[Not Available]</td> <td>Select</td> </tr> <tr> <td>CHM 10500</td> <td>[no members]</td> <td>Manual-Updating</td> <td>[Not Available]</td> <td>Select</td> </tr> <tr> <td>CHM 10900</td> <td>[no members]</td> <td>Manual-Updating</td> <td>[Not Available]</td> <td>Select</td> </tr> <tr> <td>CHM 11900</td> <td>[no members]</td> <td>Manual-Updating</td> <td>[Not Available]</td> <td>Select</td> </tr> <tr> <td>Operations Manager</td> <td>Cathy Murphy</td> <td>Auto-Updating</td> <td>[Not Available]</td> <td>Select</td> </tr> <tr> <td>Policy Manager</td> <td>Barbara Dodd</td> <td>Auto-Updating</td> <td>[Not Available]</td> <td>Select</td> </tr> <tr> <td>Records Team</td> <td>Tracy Bell</td> <td>Manual-Updating</td> <td>[Not Available]</td> <td>Select</td> </tr> </tbody> </table>	Team	Team Members	Type	Creator		Search Team	Search Team Member	Search Type	Search Creator	Select	Bioanalytics	Nadine Jarenc	Auto-Updating	[Not Available]	Select	Bioanalytics Admin	Teri Sullivan	Auto-Updating	[Not Available]	Select	CHM 10500	[no members]	Manual-Updating	[Not Available]	Select	CHM 10900	[no members]	Manual-Updating	[Not Available]	Select	CHM 11900	[no members]	Manual-Updating	[Not Available]	Select	Operations Manager	Cathy Murphy	Auto-Updating	[Not Available]	Select	Policy Manager	Barbara Dodd	Auto-Updating	[Not Available]	Select	Records Team	Tracy Bell	Manual-Updating	[Not Available]	Select
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<p>18.</p>	<p>In the Create Checklist Items window, we will enter the items for the Checklist.</p> <p>Provide a Title and a Description for the first item. If you have an existing document, you may cut and paste. You may move from field to field by using the Tab key. You may enter as many items as you wish, by clicking on the Add Row or using the Tab key.</p> <p>Select Save Changes.</p>	
<p>19.</p>	<p>If you'd like to change the Question Format, select Change.</p>	
<p>20.</p>	<p>Select the format you would like to change to, and then select Save Changes. For this example, we will keep Date.</p>	

21.	If you would like to change the Team, select Change .	
22.	<p>In the Choose a Team window, select the Team you would like to use from the drop-down menu.</p> <p>For this example, we will keep the Records Team.</p>	
23.	<p>If you would like to change any of the contents in any of the items in this Checklist, select Edit by that item.</p> <p>Select Edit for the Retention item.</p>	
24.	<p>In the Edit Checklist Item window, now you are able to alter any of the text as well as the Question Format. Select Save Changes.</p> <p>For this example, we have no changes.</p>	

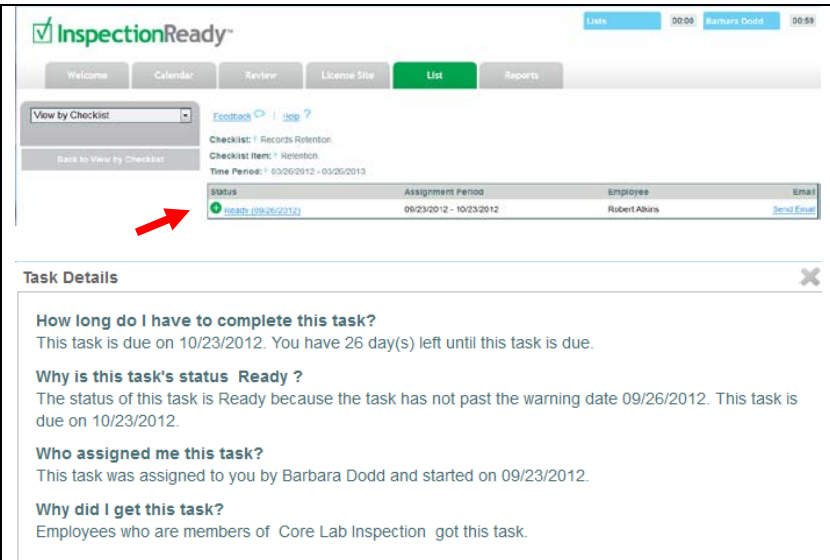
<p>25. Select the Security color bar to expand.</p>	
<p>26. This color bar is used to add privileges for users to see the list. Users may be added by clicking New and searching for an employee. Users may be removed by clicking the Remove link. Some users are added automatically by ScheduleReady such as when employees are assigned to the Revision and Review color bars of a Policy.</p> <p>You may also remove all of the users at once by clicking Remove All. All users except yourself will be removed.</p> <p>In this example, Tracy Bell and Barbara Dodd will be the users to see this list. We will select Remove for all the other employees.</p>	
<p>27. Select Save.</p> <p>Barbara and Tracy may see the list.</p> <p>You can make changes at any time.</p>	

28.	Select the Messages color bar to expand.	
29.	First we want to select when the Team should receive an email message: when the task is first sent, when the warning date is reached, and when the due date is reached. In this example, we want to have them receive an email for all three. To accomplish this, select Turn On All .	
30.	You may also select only one or two of the notifications, or none at all, by selecting Turn Off/On for the individual employee.	
31.	Select Save .	
32.	You may want someone (manager, administrator, etc) to receive an email once the Revision process has been complete. Select Click to set.	

<p>33.</p>	<p>In the Choose a Workflow window, select who should be notified when the Items have been completed.</p> <p>Notice that the Core Lab workflow folder is selected on the left and who we want to select is the Operations Manager, Cathy Murphy.</p> <p>Choose Select next to Operations Manager.</p>	 <p>Choose a Workflow</p> <p>Close Window</p> <p>Workflow Browser</p> <ul style="list-style-type: none"> Workflows <ul style="list-style-type: none"> Core Lab <ul style="list-style-type: none"> Bioanalytics <ul style="list-style-type: none"> East Satel Main Lab North Campus South Campus Workflows <table border="1"> <thead> <tr> <th>Workflow</th> <th>Description</th> <th></th> </tr> </thead> <tbody> <tr> <td>Bioanalytics</td> <td>Nadine Juarez</td> <td>Select</td> </tr> <tr> <td>Bioanalytics Admin</td> <td>Terri Sullivan</td> <td>Select</td> </tr> <tr> <td>CHM.10500</td> <td></td> <td>Select</td> </tr> <tr> <td>CHM.10600</td> <td></td> <td>Select</td> </tr> <tr> <td>CHM.11900</td> <td></td> <td>Select</td> </tr> <tr> <td>Operations Manager</td> <td>Cathy Murphy</td> <td>Select</td> </tr> <tr> <td>Policy Manager</td> <td>Barbara Dodd</td> <td>Select</td> </tr> <tr> <td>Records Team</td> <td>Tracy Bell</td> <td>Select</td> </tr> <tr> <td>Sample Sub Policy</td> <td></td> <td></td> </tr> </tbody> </table> <p>Select a Workflow to view its children. Click the 'Select' link to choose a Workflow.</p>	Workflow	Description		Bioanalytics	Nadine Juarez	Select	Bioanalytics Admin	Terri Sullivan	Select	CHM.10500		Select	CHM.10600		Select	CHM.11900		Select	Operations Manager	Cathy Murphy	Select	Policy Manager	Barbara Dodd	Select	Records Team	Tracy Bell	Select	Sample Sub Policy		
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<p>34.</p>	<p>The email notification has been turned On.</p>	 <p>Send message when... Send To Status</p> <p>The document is completed Operations Manager On Turn Off</p>																														
<p>35.</p>	<p>Select Save.</p>	 <p>Save New Delete Publish</p>																														
<p>36.</p>	<p>It is now time to Publish this Checklist, which will send the tasks to the Employees.</p> <p>Select Publish.</p>	 <p>InspectionReady</p> <p>Welcome Calendar Review License Site List Reports</p> <p>View By List</p> <p>Save New Delete Publish Successful Update Current Status: Blank</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Records: Requisition</th> <th>[show] Name</th> </tr> </thead> <tbody> <tr> <td>✓</td> <td></td> <td>[show] Contents</td> </tr> <tr> <td>✓</td> <td></td> <td>[show] Security</td> </tr> <tr> <td>✓</td> <td></td> <td>[show] Messages</td> </tr> </tbody> </table> <p>Back To List</p> <ul style="list-style-type: none"> All Common CL Bioanalytics Core Lab Checklist Orthopath CL Gen Lab CL Hem and Coag CL HR Corrective Action Policy HR Policy Immunology CL Microbiology CL Records: Requisition Team Leader CL 	Name	Records: Requisition	[show] Name	✓		[show] Contents	✓		[show] Security	✓		[show] Messages																		
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37.	Select Back to List .	
38.	Select View Task Status for Records Requisition Checklist.	
39.	<p>The View Task Status Panel allows you to view the status of the Checklist. You may drill in to view the report by years, months, or weeks by selecting the dates at the top of the report. Selecting the icons within the report allow you to view the status of the report.</p> <p>Select the Green icon for Retention.</p>	

40. The status of this task is Ready. By clicking on the task link ([Ready \(9/26/2012\)](#)), you will see the details of the task. The Assignee will also see this information (Quick Reference Checklist – Employee Tasks).



The screenshot displays the InspectionReady interface. At the top, there are navigation tabs: Welcome, Calendar, Review, License Site, List (highlighted in green), and Reports. Below the tabs, there are filters for 'View by Checklist' and 'Back to View by Checklist'. A table lists tasks with columns for Status, Assignment Period, Employee, and Email. A red arrow points to the 'Ready (9/26/2012)' link in the Status column. Below the table, the 'Task Details' section is expanded, showing the following information:

- How long do I have to complete this task?**
This task is due on 10/23/2012. You have 26 day(s) left until this task is due.
- Why is this task's status Ready ?**
The status of this task is Ready because the task has not past the warning date 09/26/2012. This task is due on 10/23/2012.
- Who assigned me this task?**
This task was assigned to you by Barbara Dodd and started on 09/23/2012.
- Why did I get this task?**
Employees who are members of Core Lab Inspection got this task.