

# Checklists instruction

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# Basic concepts

Buddy - person responsible for looking after new employees for the first months

## Entity vs Owner

The subject of the checklist is the person to whom this checklist applies.

For example:

- Off-boarding checklist: the subject is the person who leaves the company
- On-boarding checklist: the entity is the person joining the company

Each checklist has an entity.

The owner of the checklist is the person responsible for the entire checklist process.

For example:

- Checklist for buddies of new people - the subject is a new person and the owner is the buddy
- Checklist for things to do for new people (like "Arrange Jira training") - both the entity and the owner is the new person:
  - is an entity because it has a to-do list
  - is the owner because is responsible for carrying out the tasks
- Off-boarding checklist: each task has its own person responsible (eg helpdesk is responsible for collecting the equipment, and HR may be responsible for conducting the interview with the employee). So we can say that nobody is responsible for the overall off-boarding and do not determine the owner, but we can also indicate one person who is to supervise the entire process for a specific person and then that person will be the owner.

## Combined checklist vs split checklist

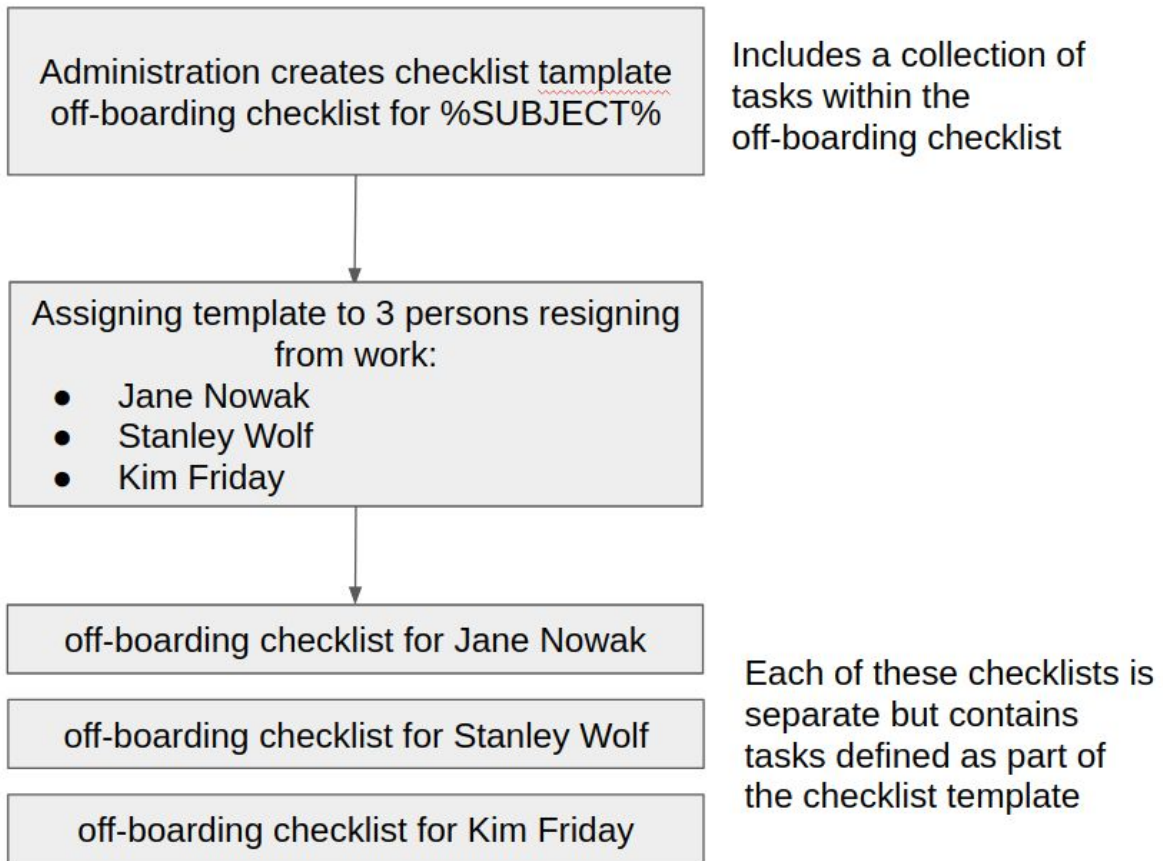
Separate checklists are those in which each task within one checklist has its responsible person. In such lists, the owner is not obligatory, but providing it authorizes him to view the state of the entire list and the ability to "ping" those responsible for specific tasks.

Combined checklists are those in which the owner of the checklist is simultaneously responsible for performing all tasks. Assignment of owners is mandatory in such checklists.

## Checklist vs checklist template

The administration creates "Checklist Templates". It is a set of tasks (in the case of checklists additionally separated with assigned persons responsible for individual tasks). Templates do not yet have specific entities or owners assigned.

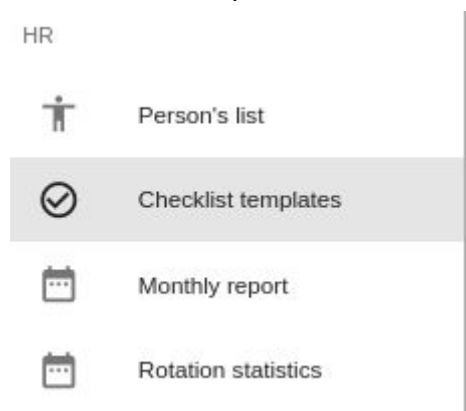
Checklists assigned to specific entities and owners are created based on templates. Each template can be "assigned" to the subject and owner any number of times.



# Case study: List of tasks for the buddy

## Template creation

In the menu on the left choose "Checklist templates":



Select the "Add new checklist template" option :

Checklist templates			Search by name...	Q	:
Name	Type	Action			
test	United	+			
test2	United	+			

In the window that appears, we complete the names of the template in Polish and English. Different language versions will be displayed in the interface depending on the language selected by the user. You can use % SUBJECT% and% OWNER% in the names. When assigning a template, the name of the subject and the owner of the checklist will be placed in the place of these variables.

You should also indicate in this step whether this checklist is linked or separated.

Checklist templates



1 Create checklist template

2 Create checklist template tasks

Checklist template name PL

Wdrożenie stażysty: %SUBJECT% - %OWNER%

Checklist template name EN

Intern introduction: %SUBJECT% - %OWNER%

The name in the template may contain the variables %OWNER% and %SUBJECT%, in which the name of the owner and the entity of the list respectively will be entered.

☒ United - where the responsibility for the entire list has one person

☐ Distributed - where each task has its responsible person.

CANCEL

NEXT

After clicking "Next" you can take care of completing tasks. Further tasks are added to the checklist using the "New task" button:

#### Checklist templates



1 Create checklist template

2 Create checklist template tasks

NEW TASK

Name PL	Name EN	Description PL	Description EN	Actions
No data available.				

Rows per page: 5

RETURN

CANCEL

SAVE

In the new task window, enter the name and description of the task, also in Polish and English.

New task

Name PL

Sprawdź dostęp do Jiry

Name EN

Check access to Jira

Description PL

Stażysta powinien mieć założone konto w Jirze i dostęp do projektu, w którym będzie się uczył.

Description EN

Intern should have account in Jira and access to learning project.

NEW STATUS

Label PL	Label EN	Default	Done	Icon	Actions
Oczekujący	Waiting	Yes	No	!	
W przygotowaniu	In progress	No	No	🕒	
Gotowe	Done	No	Yes	✓	

Rows per page: 5

1-3 of 3

CANCEL

SAVE

Once all tasks have been added, you can save the template. It will then appear on the checklist template list; you can delete or edit it at any time.

Checklist templates			Search by name...	
Name	Type	Action		
Intern introduction: %SUBJECT% - %OWNER%	United			
Rows per page: 5			6 of 6	

## Assignment of buddy and trainee

Let's assume that a new intern, Jane Nowak, is joining the company, and Norbert Kowalik will be her supervisor during the internship. We want to assign a trainee implementation checklist to her tutor. To do this, click on the template assignment button (plus icon) on the list of templates:

Checklist templates			Search by name...	
Name	Type	Action		
Intern introduction: %SUBJECT% - %OWNER%	United			
Rows per page: 5			6 of 6	

In the form, we indicate the entity - Jane Nowak, to whom this list applies - and the owner responsible for the tasks, i.e. the intern's buddy:

### Assign person



Checklist owner



ADD

Responsibles for checklist:



Norbert Kowalik



Owner is a person responsible for a checklist. Owners see checklist on their dashboard. In case of united checklists this field is required.

Checklist subject



Jane Nowak



Subject is a person to whom the checklist applies, for example if checklist describes procedure of introducing new person, then this person is a subject of a checklist. This field is required.



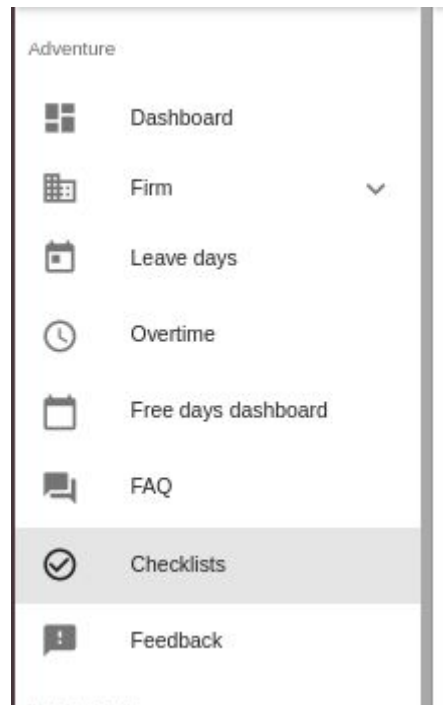
Hidden for subject

ASSIGN

After clicking "Assign" a checklist will be created based on the selected template. Along with Jane Nowak, several other trainees joined the company, so we can assign them in the same way.

## Preview of existing checklist

All existing checklists are available for administration and HR in the "Adventure" menu:



A list with checklist assigned to new intern is displayed here. We can see that in the % SUBJECT% and % OWNER% variables the names of trainee and their buddy were correctly substituted:

Dashboard

Firm

Leave days

Overtime

Fire days dashboard

FAQ

Checklists

Checklists

Search by name, owner, subject...

Name	Owner	Subject	Start date	Finish date	Progress	Delete
Intern introduction: Jane Nowak - Norbert Kowalik	<div><div></div>Norbert Kowalik</div>	<div><div></div>Jane Nowak</div>	09.07.2020		<div><div></div>0 / 2</div>	<div><div></div></div>
					Rows per page: 5	21-21 of 21

On the right we see the progress of the checklist. They consist of two tasks, but none of them are ready yet. After clicking the checklist, we can see the list details in the window:

## Intern introduction: Jane Nowak - Norbert Kowalik



Subject:  Jane Nowak	 <b>Checklist assigned</b> 9 Jul 2020 11:31:19
Owners:  Norbert Kowalik	
Type: United	

Check access to Jira

Check if laptop is prepared

## Making a list

The buddy, as the owner of the checklist, has an overview of the status of the tasks directly on the dashboard:

Checklists		
Name	Subject	Progress
Intern introduction: Jane Nowak - Norbert Kowalik	Jane Nowak	<div><div></div></div> 0 / 2
Rows per page: 5 1-1 of 1 < >		
News in Divante +		

After clicking the task, the details of the task are displayed. With the arrow next to the status, the owner can change this status:

## Task details



### Name

Check access to Jira

### Description

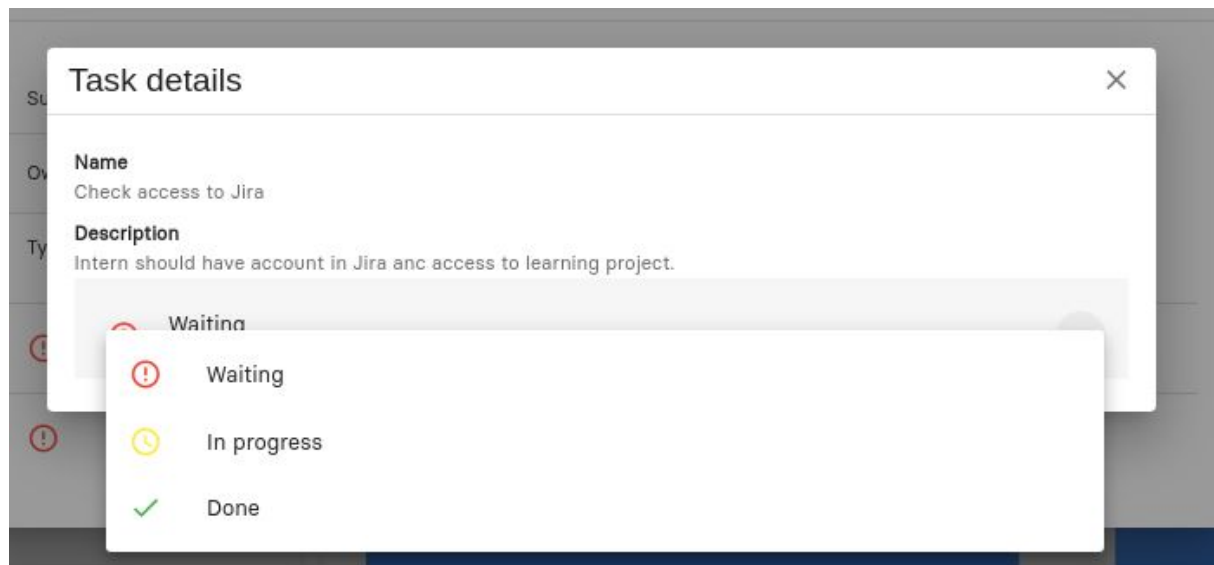
Intern should have account in Jira and access to learning project.



Waiting  
Status







If all the tasks on the list are marked as done, the checklist will be considered ready and will disappear from the dashboard. However, it will still be visible in the administrative panel in the list of all checklists:

Checklists						
Search by name, owner, subject...						
Name	Owner	Subject	Start date	Finish date	Progress	Delete
Intern introduction: Jane Nowak - Norbert Kowalik	Norbert Kowalik	Justyna Dzikowska	09-07-2020	09-07-2020	2 / 2	
			Rows per page: 5 21-21 of 21			

# Separated checklist - differences


The case of the split checklist (where each task has its own responsible person) is very similar, so I will list only the differences:

## Creating tasks

When adding tasks to the distributed checklist, an additional field appears in which you must indicate the person responsible for the task.

New task

Task owner

 Maciej Wilk

Name PL

Szkolenie z Avaza

Name EN

Avaza training










Description PL

poznanie programu

Description EN

learn more about program

NEW STATUS

Label PL	Label EN	Default	Done	Icon	Actions
Oczekujący	Waiting	Yes	No		 
W przygotowaniu	In progress	No	No		 
Gotowe	Done	No	Yes		 

Rows per page:

5

1-3 of 3

<

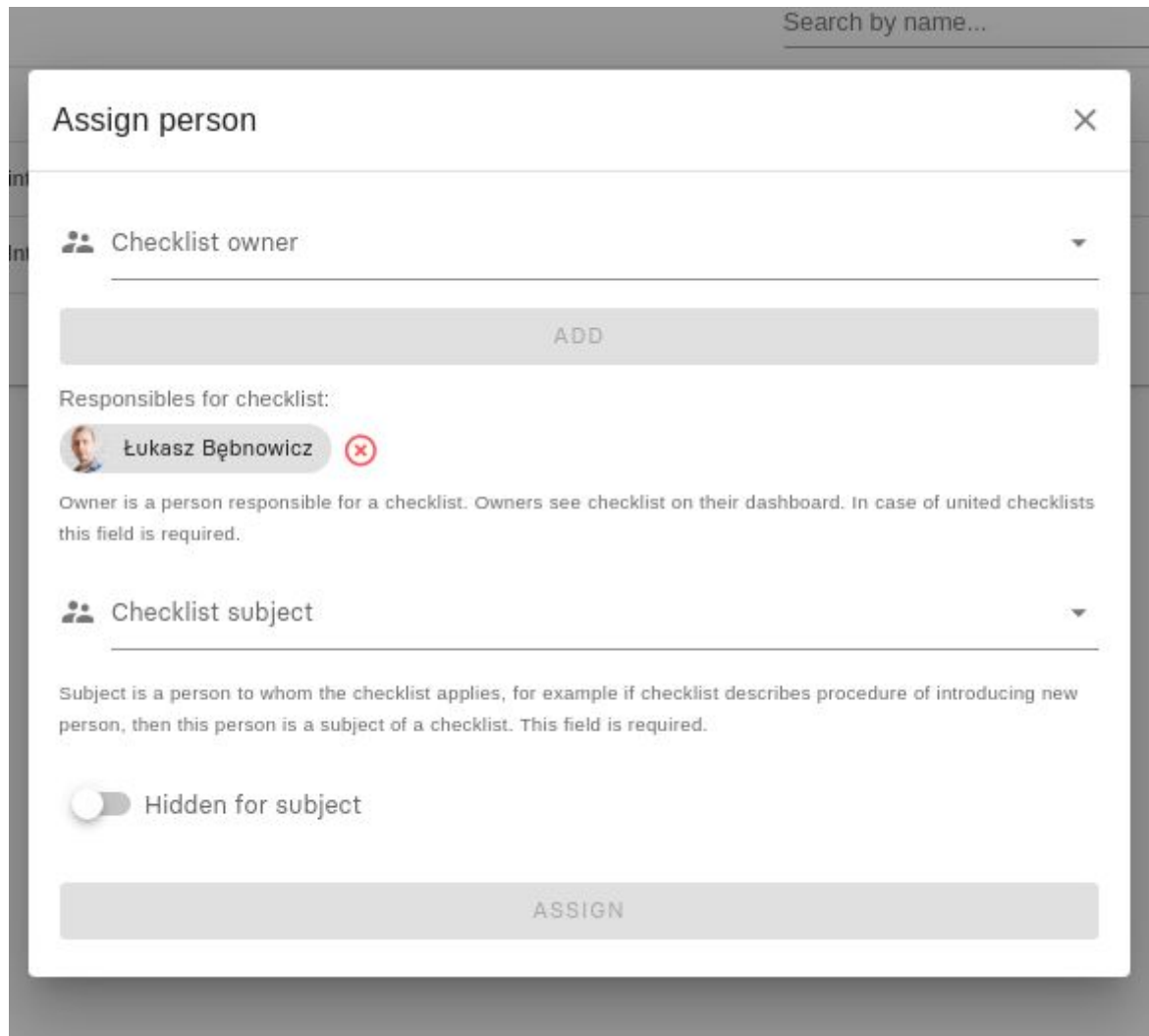
>

CANCEL

SAVE

## Assigning a template

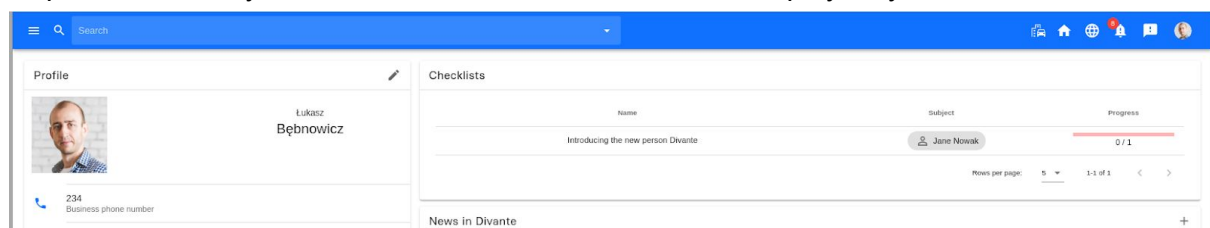
Separated checklists do not require the owner to provide. However, this can be done if we want someone to have access to the entire checklist.



The image shows a modal window titled "Assign person" with a close button (X) in the top right corner. At the top, there is a search bar labeled "Search by name...". Below this, there are two main sections: "Checklist owner" and "Checklist subject". Each section has a dropdown menu with a person icon and a name. Below the "Checklist owner" dropdown is a large grey button labeled "ADD". Below the "Checklist subject" dropdown is a large grey button labeled "ASSIGN". Between these two sections, there is a section titled "Responsibles for checklist:" which contains a list of people. The first person listed is Łukasz Bębnowicz, with a red 'X' icon next to his name. Below this list, there is a text explanation: "Owner is a person responsible for a checklist. Owners see checklist on their dashboard. In case of united checklists this field is required." At the bottom of the modal, there is a toggle switch labeled "Hidden for subject" which is currently turned off.

## View of the person responsible for the task

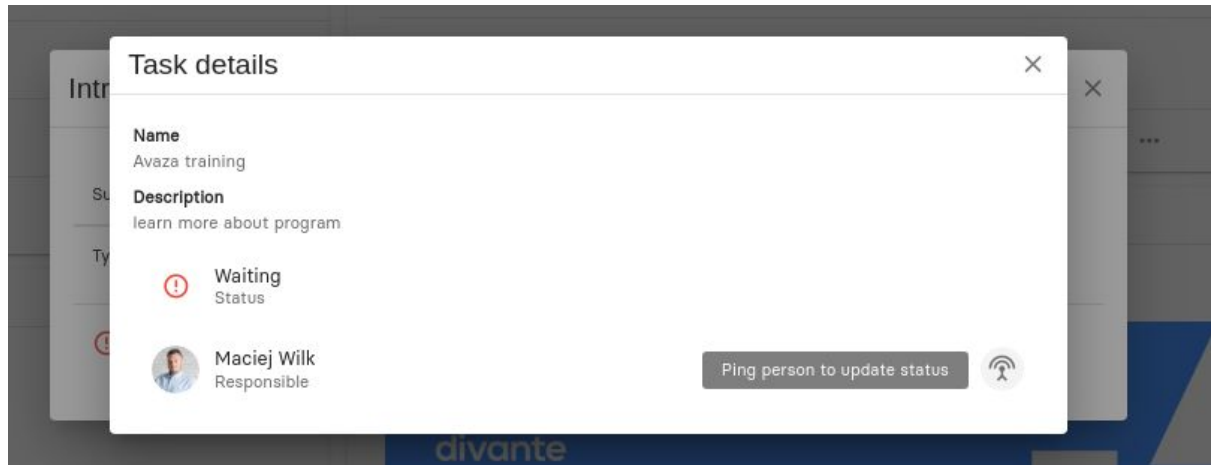
People responsible for some task have access to the checklist on the dashboard. This checklist is limited to tasks for which you are responsible. This means that if, for example, the checklist "Implementing a new person into Divante" consists of 5 tasks and the user is responsible for only one of them, then the dashboard will display only this one task:



The image shows a dashboard view for a person named Łukasz Bębnowicz. On the left, there is a profile card with a photo, name, and business phone number (234). On the right, there is a section titled "Checklists" which displays a table with columns for Name, Subject, and Progress. The table shows a single task: "Introducing the new person Divante" with the subject "Jane Nowak" and a progress bar showing 0/1. Below the table, there is a "News in Divante" section with a plus icon.

## Owner view

If we assign an owner to a distributed checklist, then he will have access to all tasks on the dashboard. The owner cannot change the statuses of tasks in which he is not responsible, but he can ping the person responsible for the task - then that person gets a message by email and / or via Slack with a request to update the status of the task.



## For advanced

Below are more complex elements of the checklist system, which may be useful in rarer cases.

### Editing assigned templates

If a template has been assigned to someone and a new checklist has been created, you can safely edit this template. Each checklist creates a copy of the tasks from the template, so existing checklists **will not be changed** and will still have old data.

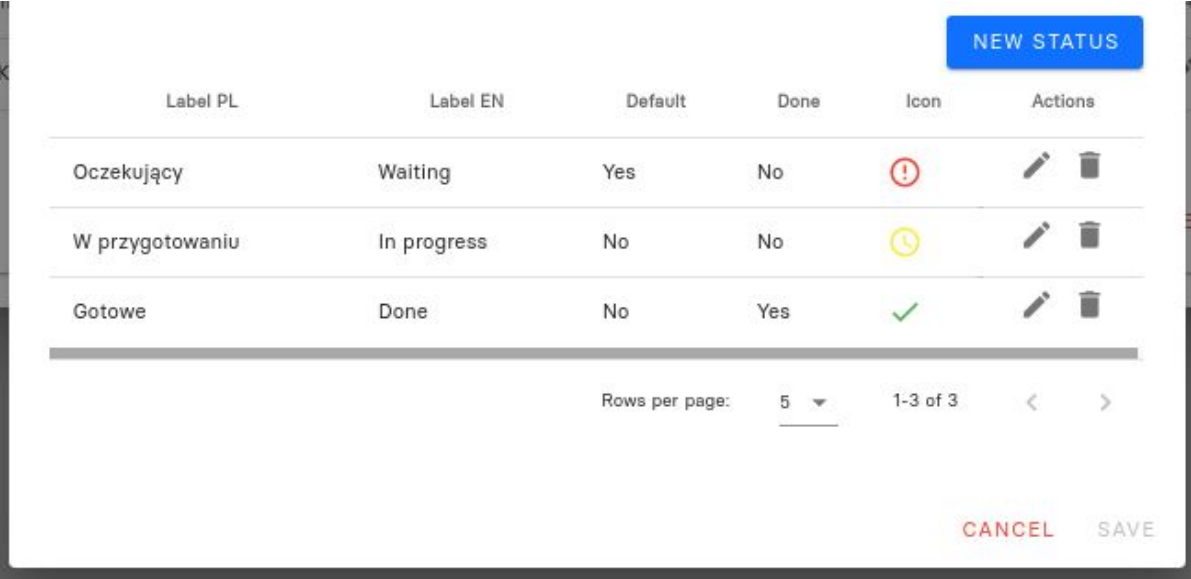
For example, suppose you have created a "new person implementation" separated checklist template, under which we have determined that Maciej Wilk is responsible for the "Training with Avaza" task. After a few months, the management board decided that Wojciech Gajewski will conduct training in Avaza from today. We can edit the checklist template and change the person responsible for the training task from Avaza, and the existing checklists will not change (so you can see who was trained by Maciek and who was trained by Wojtek).

If any checklists are still underway, they will not be changed either. The method of this solution is free:

- removing the checklist and connecting it again,
- definitely that the ongoing training of trainees is to be conducted by Maciek,
- notification of trainees about the change by email;)

### Editing available statuses

When adding more tasks to the default checklist, three statuses are created: "Pending", "In preparation" and "Done":



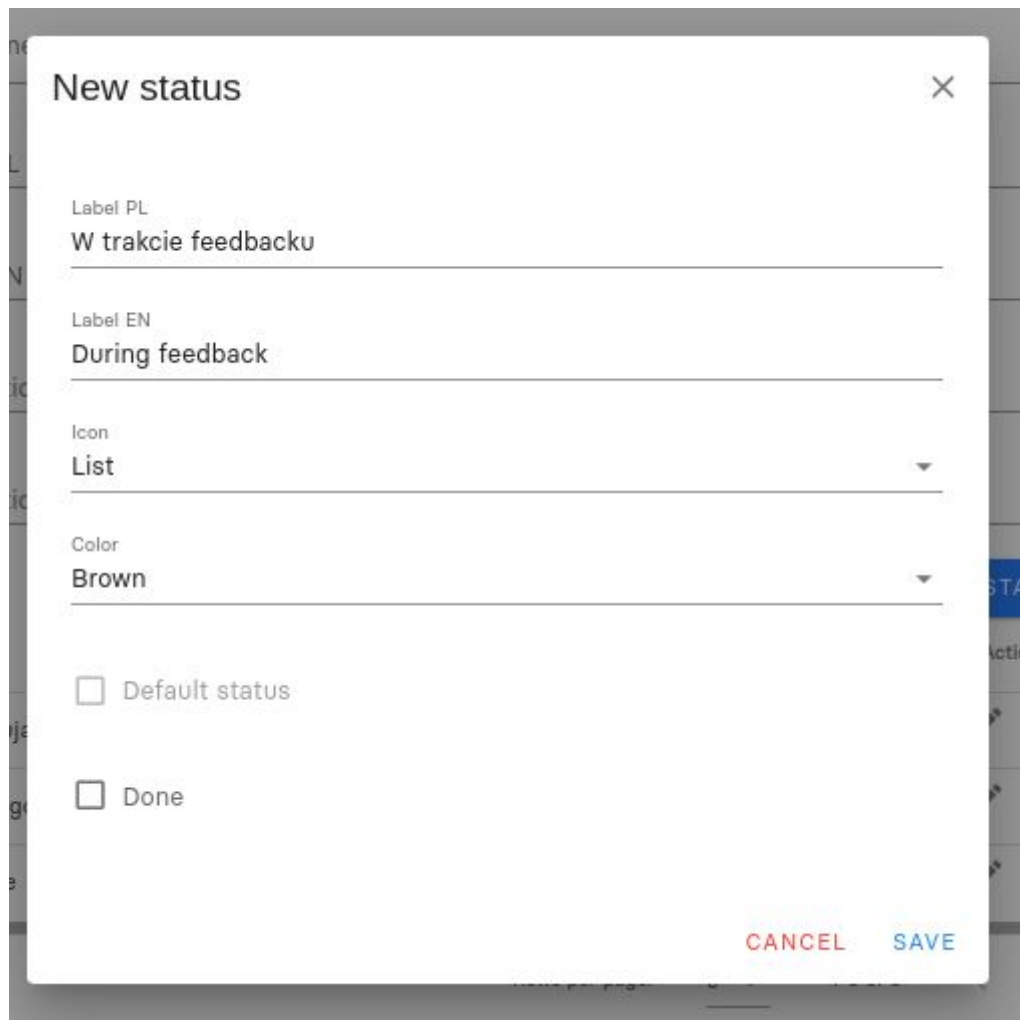
The screenshot shows a web interface for managing checklist statuses. At the top right is a blue button labeled "NEW STATUS". Below it is a table with the following columns: "Label PL", "Label EN", "Default", "Done", "Icon", and "Actions". The table contains three rows of status data. At the bottom of the table area, there is a "Rows per page:" dropdown set to "5", and a pagination indicator "1-3 of 3" with left and right arrow buttons. At the very bottom right, there are "CANCEL" and "SAVE" buttons.

Label PL	Label EN	Default	Done	Icon	Actions
Oczekujący	Waiting	Yes	No	⚠️	
W przygotowaniu	In progress	No	No	🕒	
Gotowe	Done	No	Yes	✅	

Rows per page: 5 1-3 of 3 < >

CANCEL SAVE

You can delete, edit or create new statuses by specifying the name, icon and its color.



The screenshot shows a 'New status' dialog box with a close button (X) in the top right corner. It contains four input fields: 'Label PL' with the value 'W trakcie feedbacku', 'Label EN' with the value 'During feedback', 'Icon' with a dropdown menu showing 'List', and 'Color' with a dropdown menu showing 'Brown'. Below these fields are two checkboxes: 'Default status' and 'Done', both of which are currently unchecked. At the bottom right of the dialog are two buttons: 'CANCEL' in red and 'SAVE' in blue.

From the system's point of view, the "Default status" and "Ready" switches are the most important here:

- The default status is the task status that is selected when the template is assigned. When you assign a template to an entity (and owner), all tasks default to this status. There must always be **one and exactly one** default status.
- Status "ready" means that work on the task has been completed. If all the tasks on the list have the status "Ready", then the whole list is considered completed. There must always be **at least one** "ready" status, but there can be more. For example, you can create a "Ready" status when the task is completed successfully, and a "Canceled" status when you decide not to complete the task. In both cases the task will be considered completed.