Divante Adventure

Checklists instruction

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 theentity 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

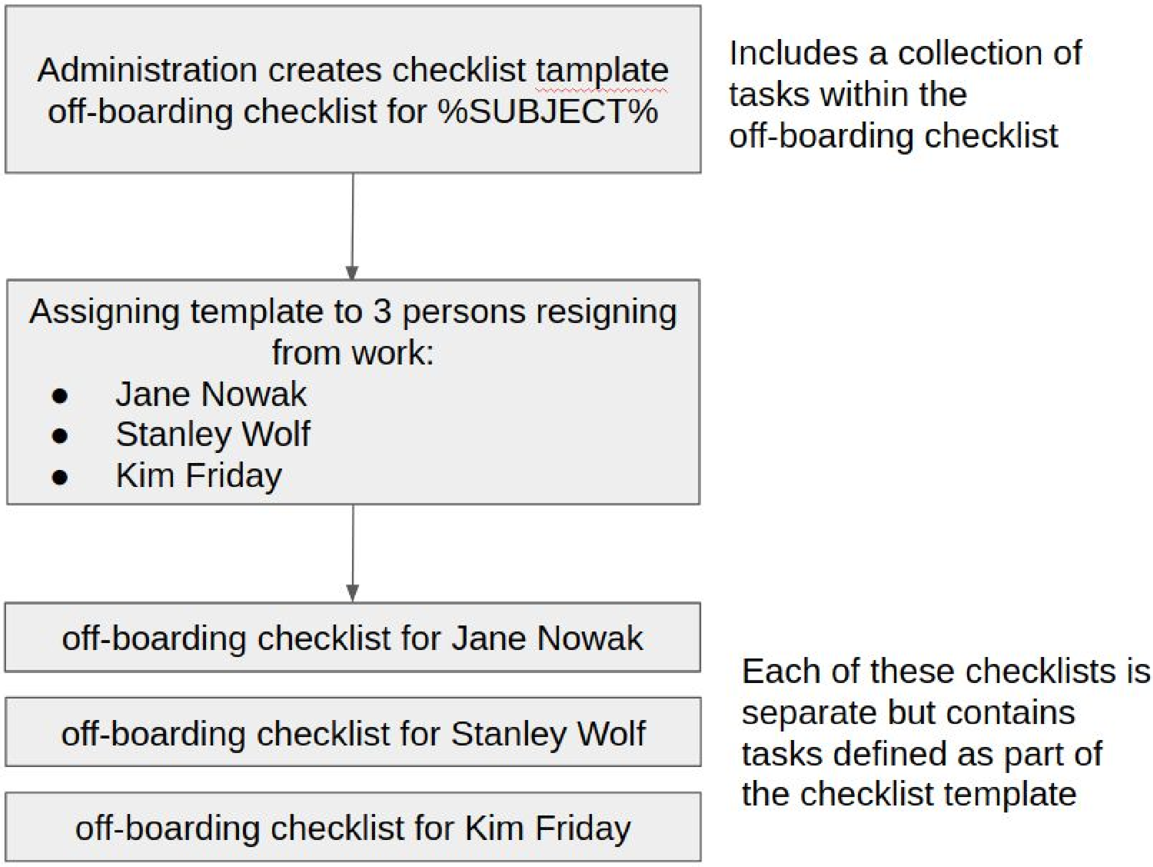
Separate checklists are those in which each task within one checklist has its responsible person. In such lists, the owner is not obligatory, but providing it authorizes him to view the state of the entire list and the ability to "ping" those responsible for specific tasks.

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.

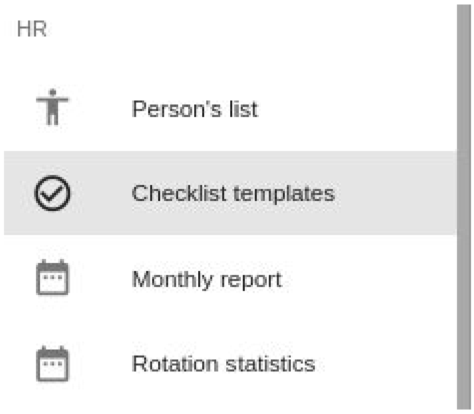
Checklists assigned to specific entities and owners are created based on templates. Each template can be "assigned" to the subject and owner any number of times.


Administration creates checklist tamplate off-boarding checklist for %SUBJECT%
Includes a collection of tasks within the off-boarding checklist
Assigning template to 3 persons resigning from work:
Jane Nowak
Stanley Wolf
Kim Friday
off-boarding checklist for Jane Nowak
off-boarding checklist for Stanley Wolf
off-boarding checklist for Kim Friday
Each of these checklists is separate but contains tasks defined as part of the checklist template

Case study: List of tasks for the buddy

Template creation

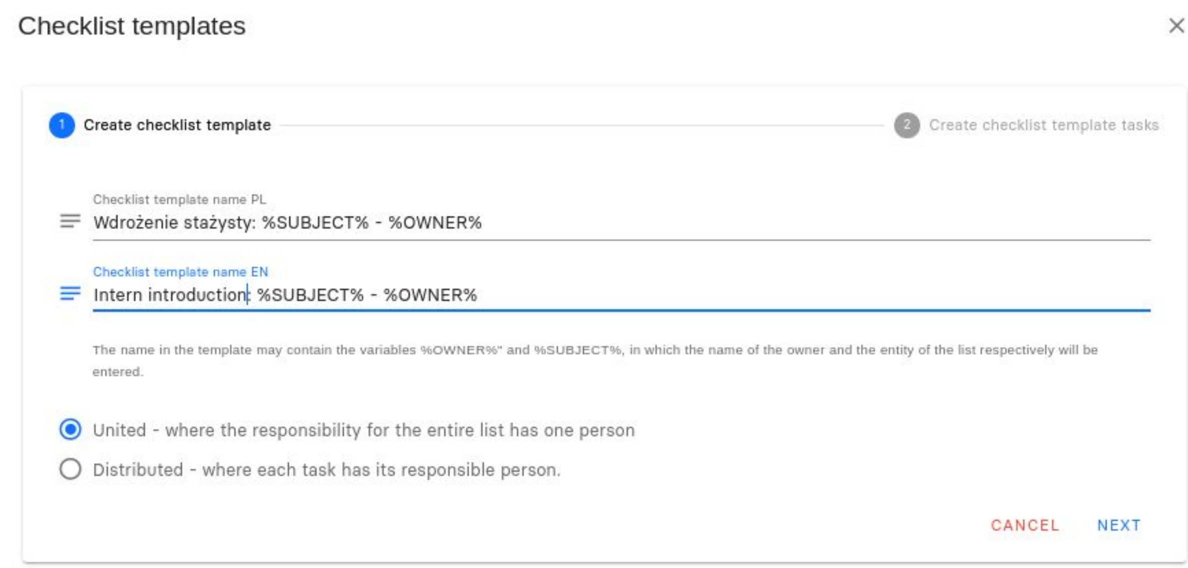
In the menu on the left choose "Checklist templates":



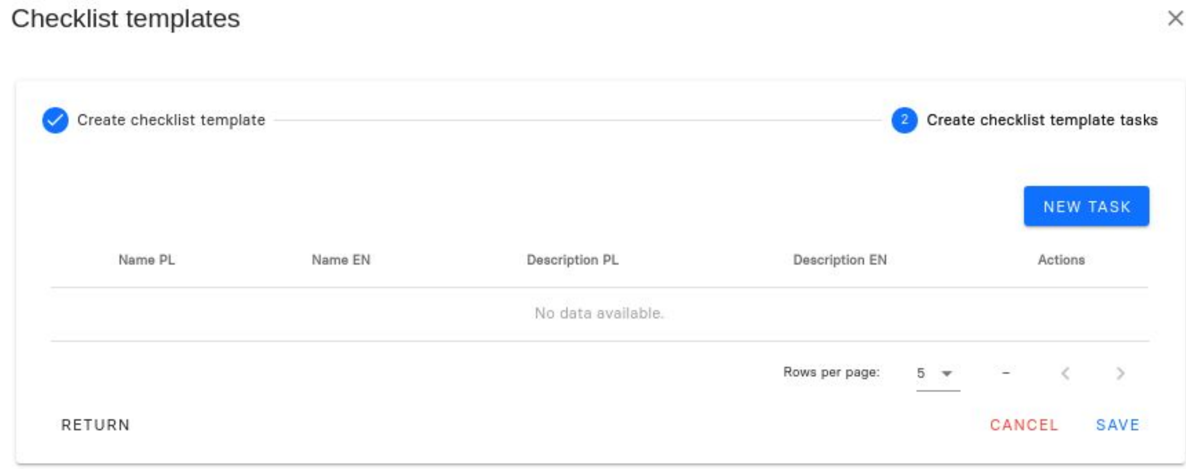
Select the "Add new checklist template" option :

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.

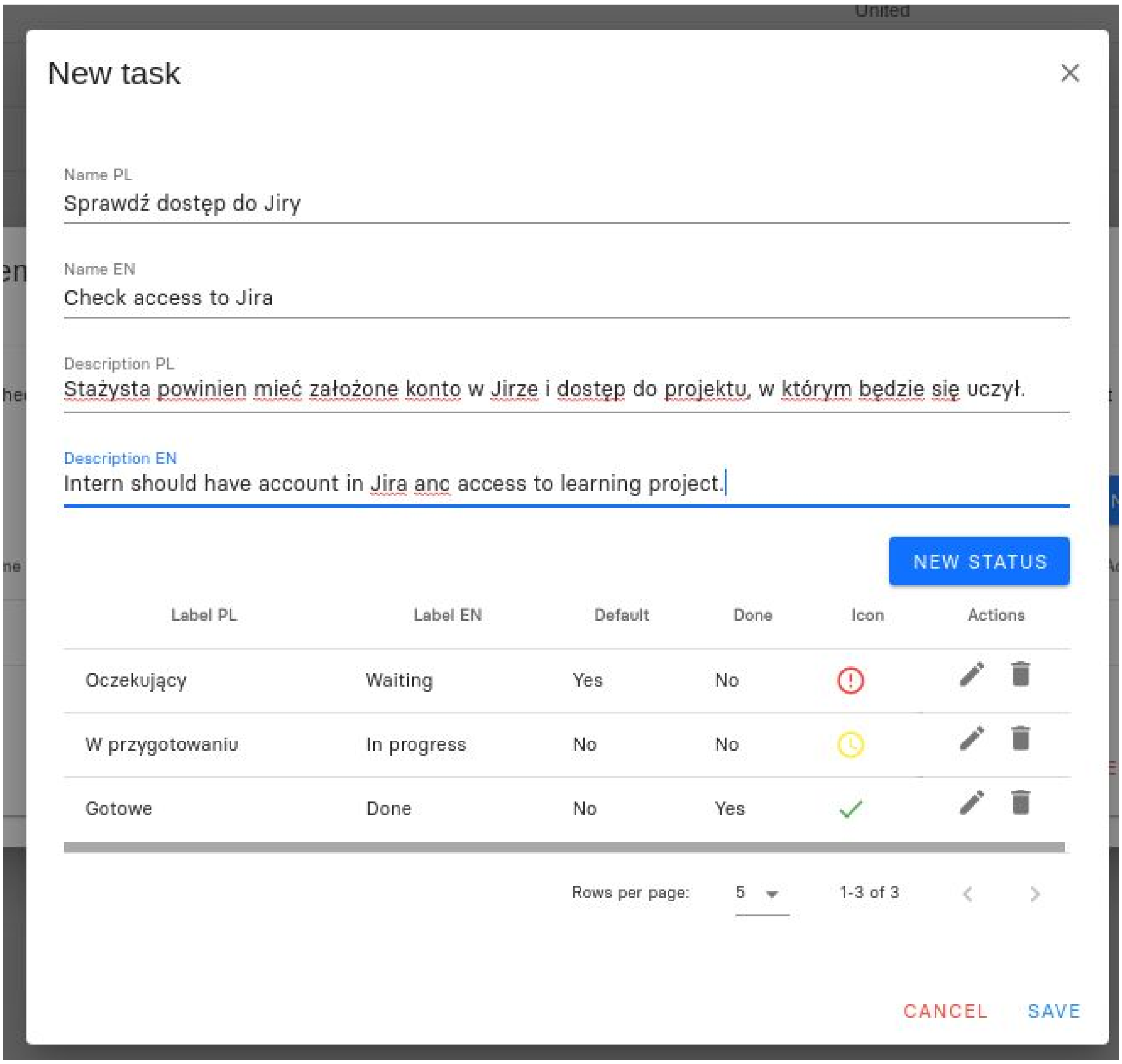
You should also indicate in this step whether this checklist is linked or separated.



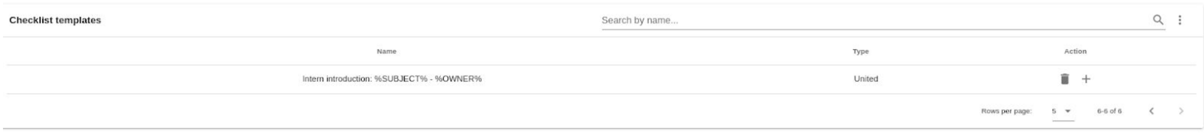
After clicking "Next" you can take care of completing tasks. Further tasks are added to the checklist using the "New task" button:



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



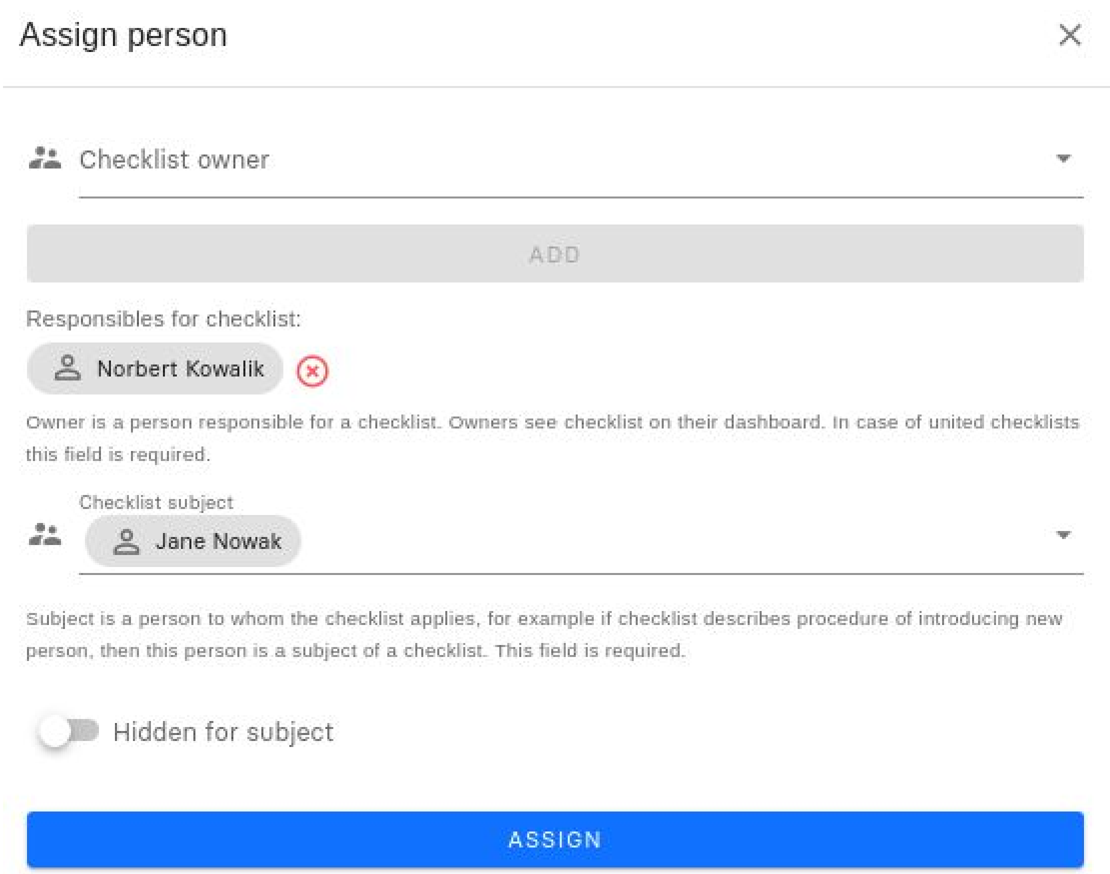
Once all tasks have been added, you can save the template. It will then appear on the checklist template list; you can delete or edit it at any time.



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:

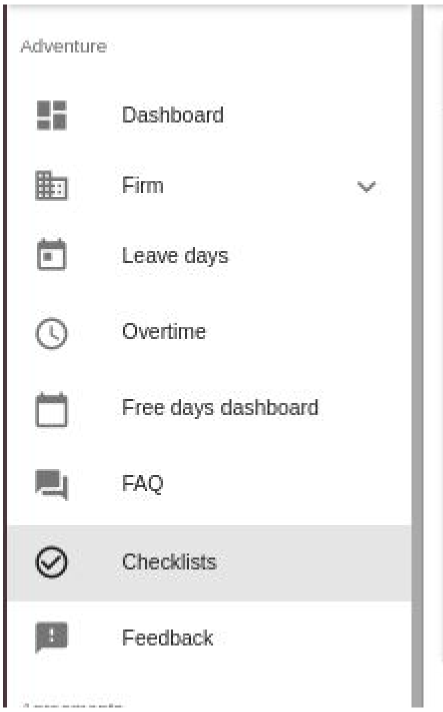
In the form, we indicate the entity - Jane Nowak, to whom this list applies - and the owner responsible for the tasks, i.e. the intern's buddy:



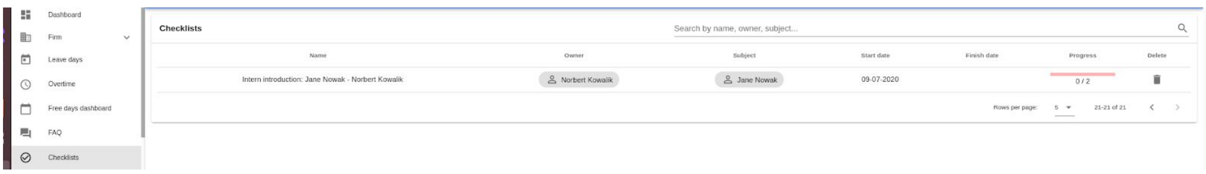
After clicking "Assign" a checklist will be created based on the selected template. Along with Jane Nowak, several other trainees joined the company, so we can assign them in the same way.

Preview of existing checklist

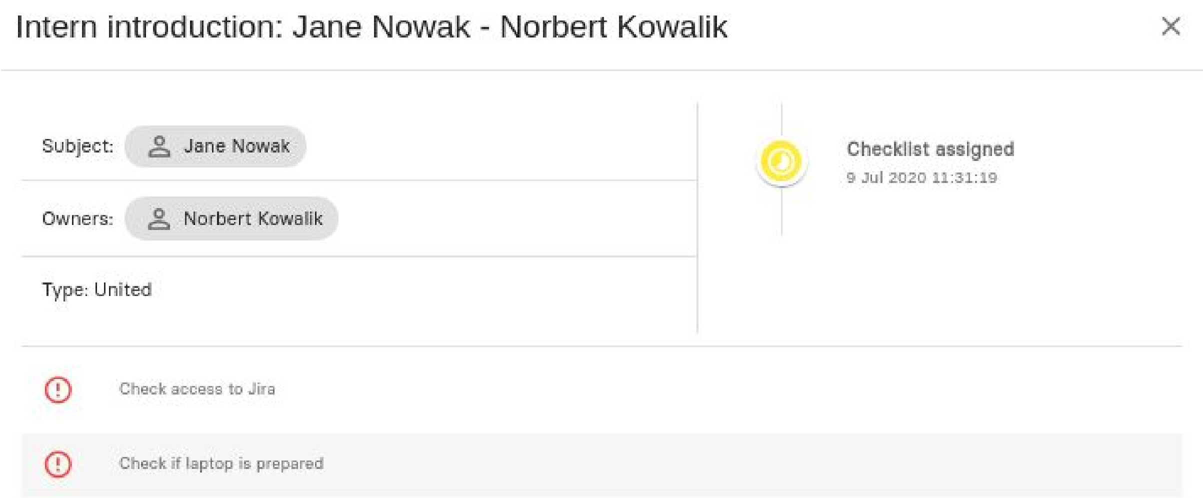
All existing checklists are available for administration and HR in the "Adventure" menu:



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:

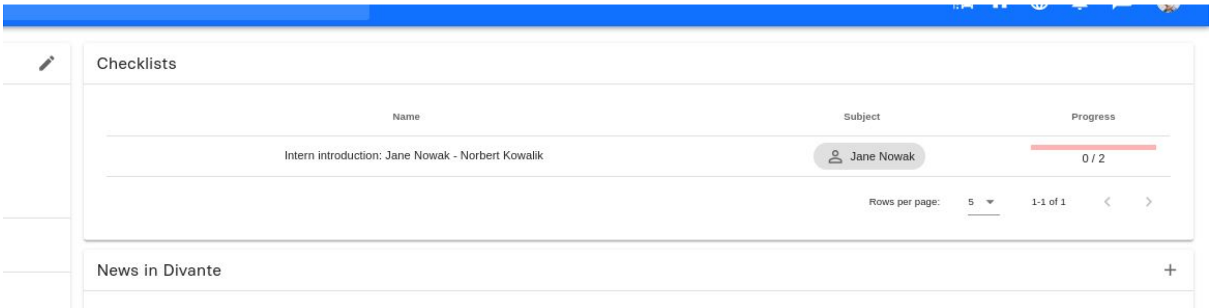


On the right we see the progress of the checklist. They consist of two tasks, but none of them are ready yet. After clicking the checklist, we can see the list details in the window:

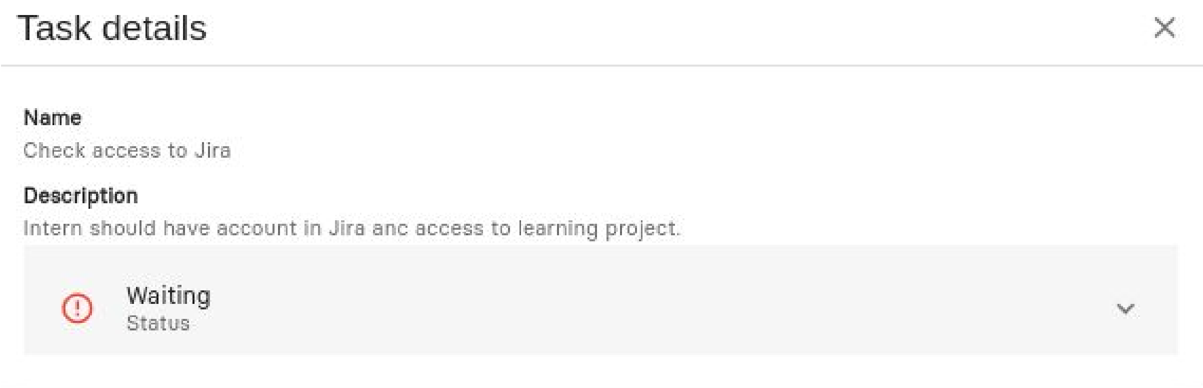


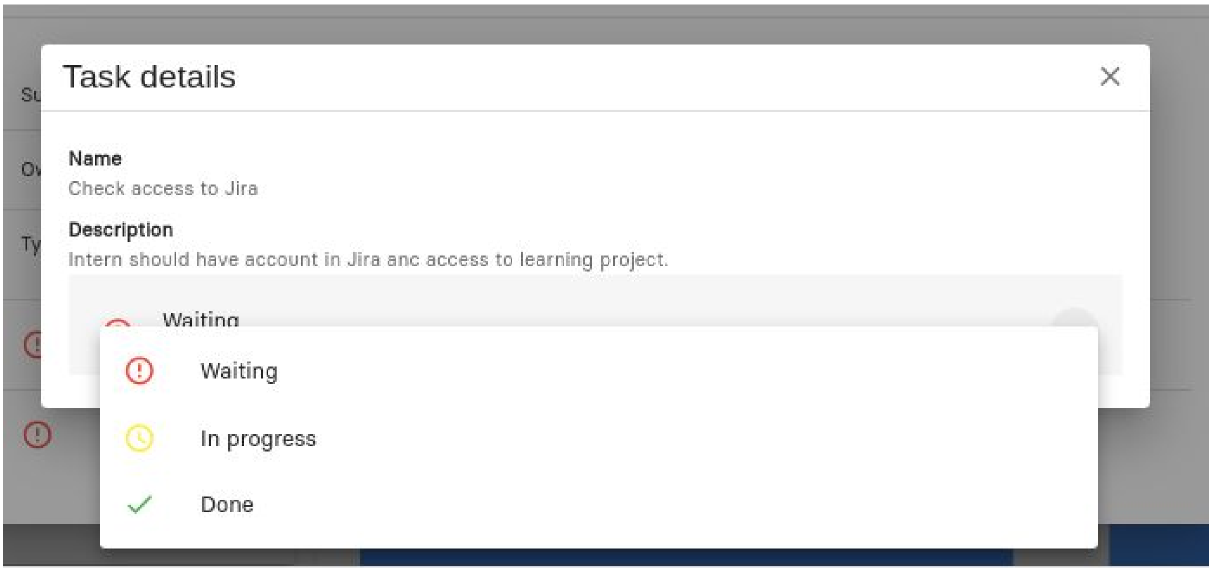
Making a list

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

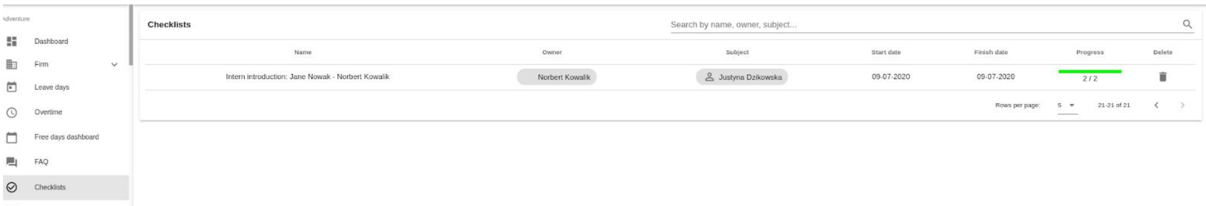


After clicking the task, the details of the task are displayed. With the arrow next to the status, the owner can change this status:





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:

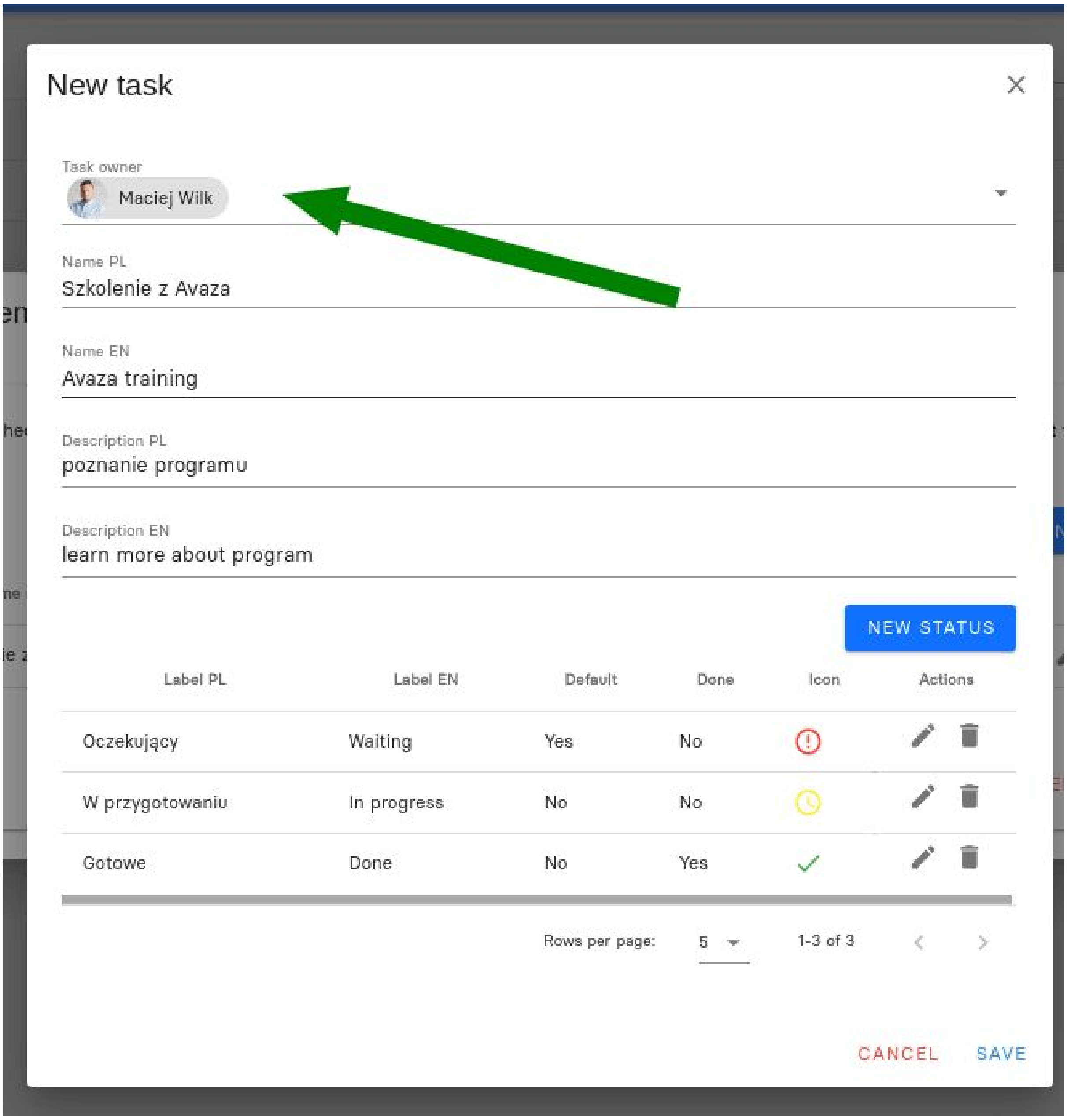


Separated checklist - differences

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

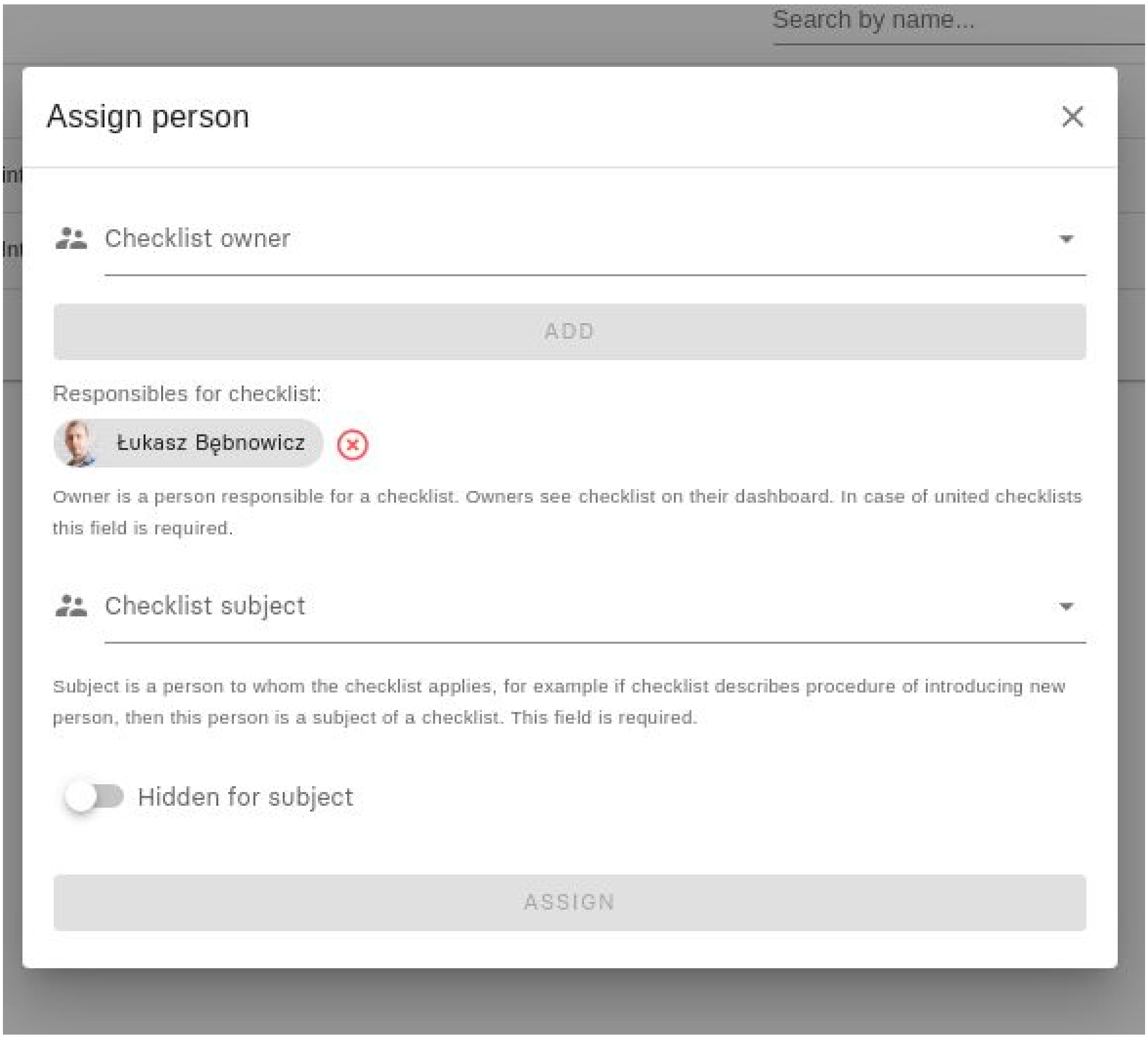
Creating tasks

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



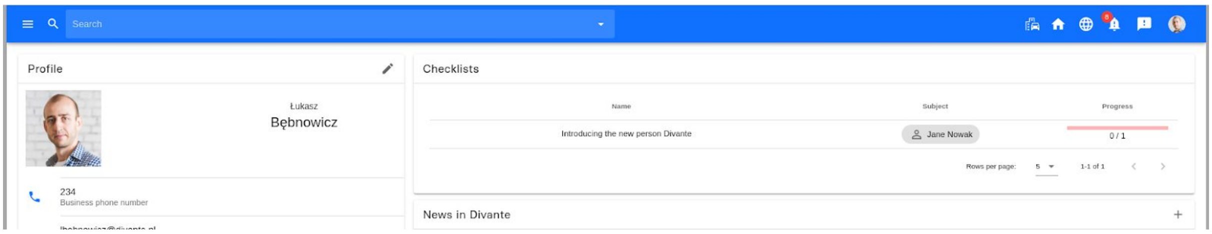
Assigning a template

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.



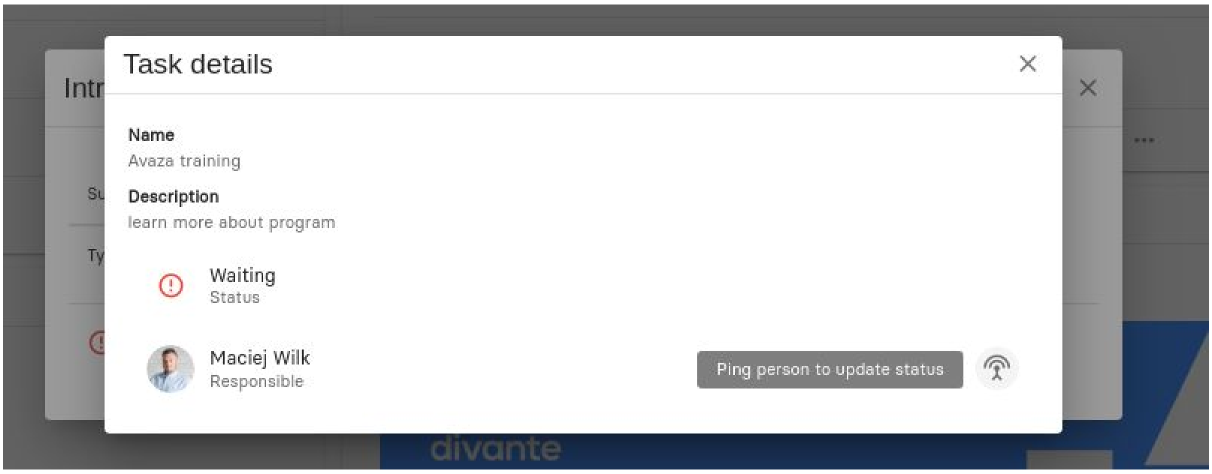
View of the person responsible for the task

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:



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.

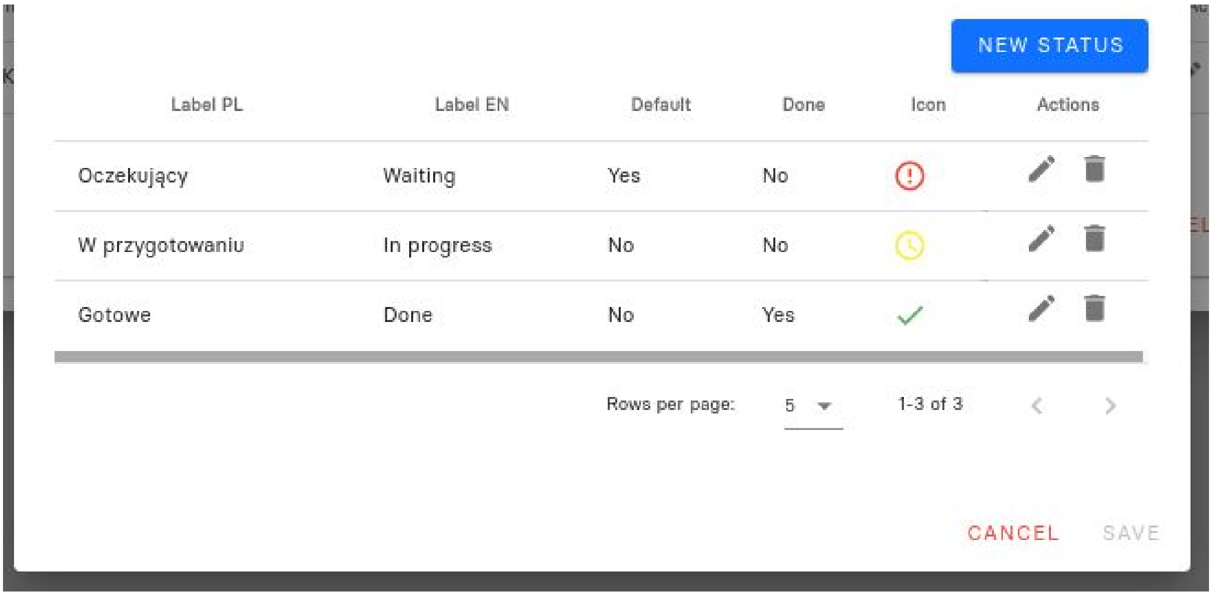
For example, suppose you have created a "new person implementation" separated checklist template, under which we have determined that Maciej Wilk is responsible for the "Training with Avaza" task. After a few months, the management board decided that Wojciech Gajewski will conduct training in Avaza from 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:

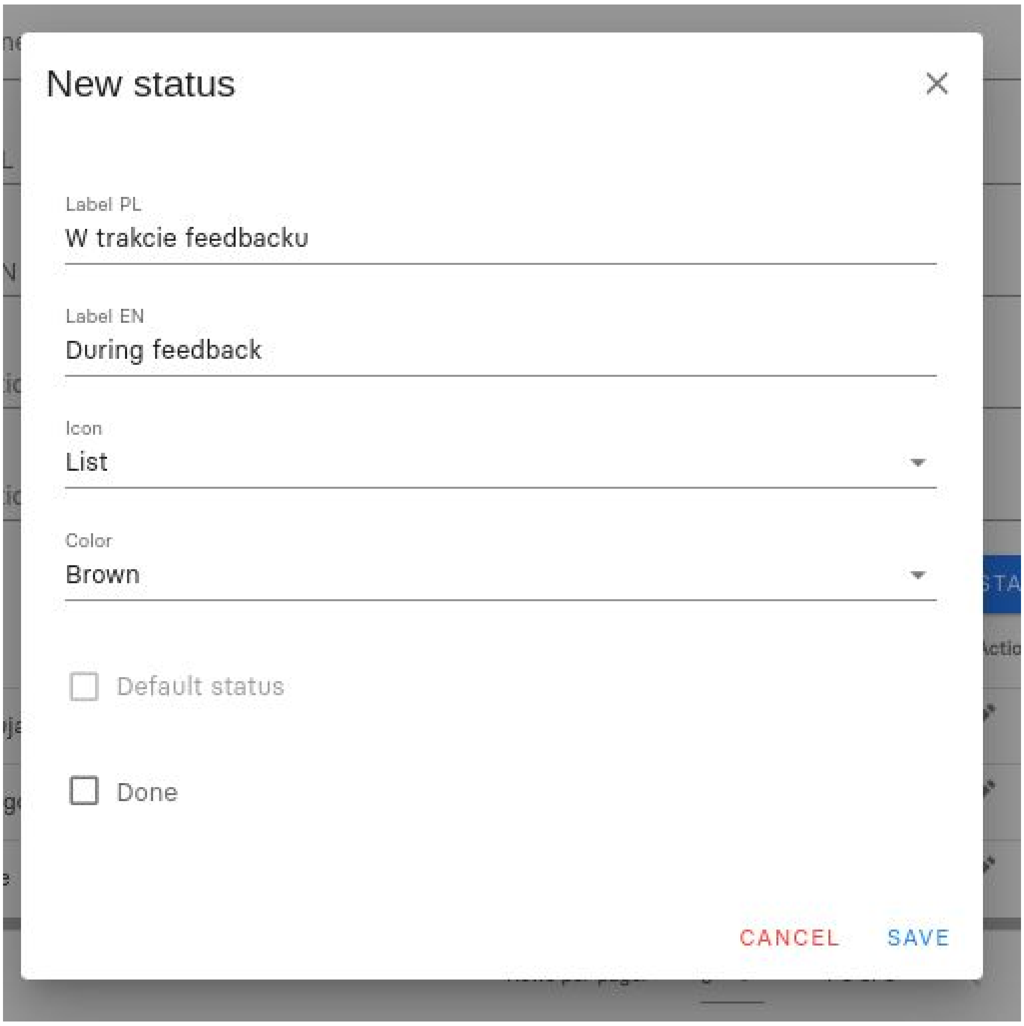
- removing the checklist and connecting it again,
- definitely that the ongoing training of trainees is to be conducted by Maciek,
- notification of trainees about the change by email;)

Editing available statuses

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



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



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.