# Using Task Checklists

Task checklists are a series of items that require a response (Yes, No, NA) which can be added to tasks. They are visible in Office and in Field.

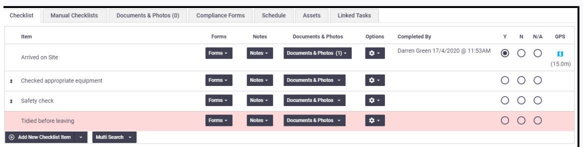
A task checklist might be used to list a series of steps that field staff should follow to properly complete a task. For example:

- Arrived on Site
- Compliance Forms Completed
- Labour and Materials booked out
- Site left clean and tidy.

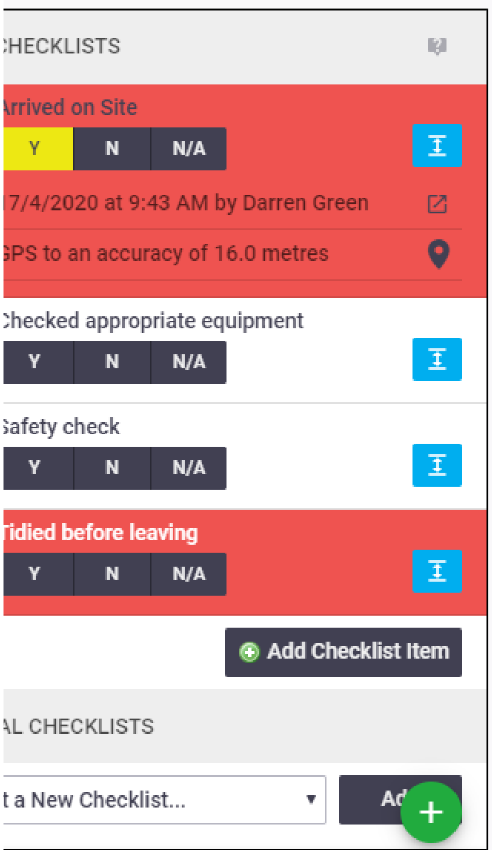
Checklists can also be used to:

- Guide a user through a task
- Automatically start and stop the labour timer
- Prompt a user to complete certain forms, such as compliance or maintenance forms
- Record when or where a certain checklist item was completed, for future reference.

**Office View**



**Field View**




Checklists can be added manually to any task or quote after it has been created, or, if it's a series of steps common to your Task Types, checklists can also be inserted automatically as soon as the task or quote is created.

**On this page:**



**Feature access**

Your Permission Group controls access to this feature.

Parts of this feature are included in **AroFloGo**.

**Related articles**

See this feature in Field

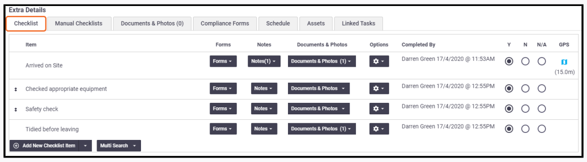
- Checklist Templates
- Checklists
- Using Task Checklists

# Create a checklist template

Task checklists are generated from checklist templates. Please refer to Checklist Templates for more information.

# View task checklists

When viewing a Task in Office, Checklists appear in the **Checklist** tab. Depending on the Task Type, Auto-Add Checklists may appear as soon as the task is created. Otherwise, Checklist items can be added manually using instructions below.



Auto-Add Checklists can be set up by your Site Administrator within Site Admin - Task Types.

# Add more checklist items

Once a Task has been created, additional checklist items can be added if required. This can be useful if a task requires ad hoc checklist items that are unique to a particular job, or if you need to add existing items from other checklist templates.

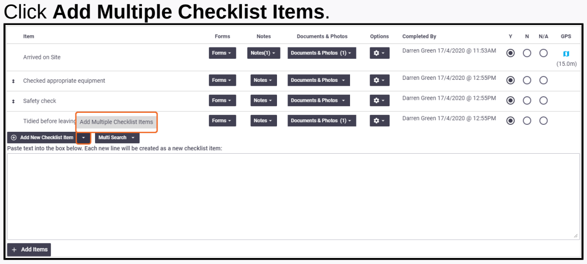
An ad hoc checklist Item is effectively a one-off checklist step. Ad hoc checklist items can be added by clicking **Add New Checklist Item**.

Ad hoc checklist items can also be set up to update Checklist Templates automatically within Site Admin - Checklist Settings.

## Copy and paste checklist items

If you have existing checklists saved in a different file format such as Word or Excel, you can easily copy and paste that information into AroFlo to quickly create custom checklists.

1. Click the arrow icon on the **Add New Checklist Item** button.
2. Click **Add Multiple Checklist Items**.



3. Copy text from an external source and paste into the white box.

You will need to ensure each checklist item is on a new line. This text box is limited to 800 characters.

4. When you're ready, click **Add Items**.

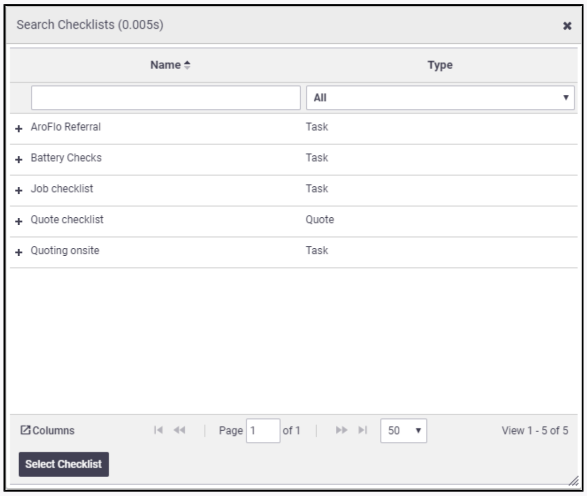
These items can be edited before saving.

5. **Save**.

## Multi-search checklist items

Multi-search allows you to select an existing checklist item from another checklist template.

1. Select **Multi-Search** > **Task Type Checklists**
2. To select all items within a checklist template, double click the checklist template name.
3. To select an individual item, click the **+** icon to expand the checklist template and double click the item you require.

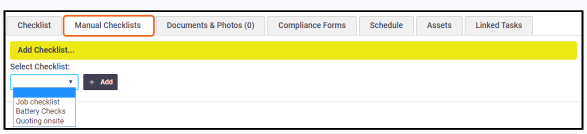



## Add manual checklists

You can manually add additional checklists to a task via the **Manual Checklist** tab.

Manual checklists are useful if:

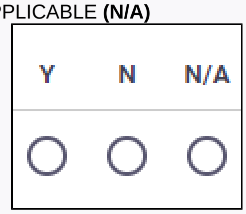
- You have generic checklists which could be used for multiple Task Types,
- You have checklists which don't need to be added every time you select that Task Type.
- If you are working on the task over multiple days or with multiple people. For example, you have completed the first checklist item (i.e. Arrived on Site) on day 1, and need to add the same checklist item again on day 2.



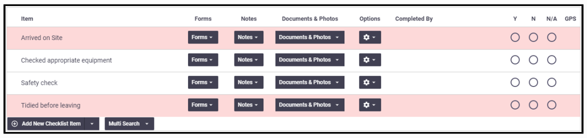

Manual Checklists shown in the list are configured by a Site Administrator within Site Admin - Task Types

## Complete checklist items

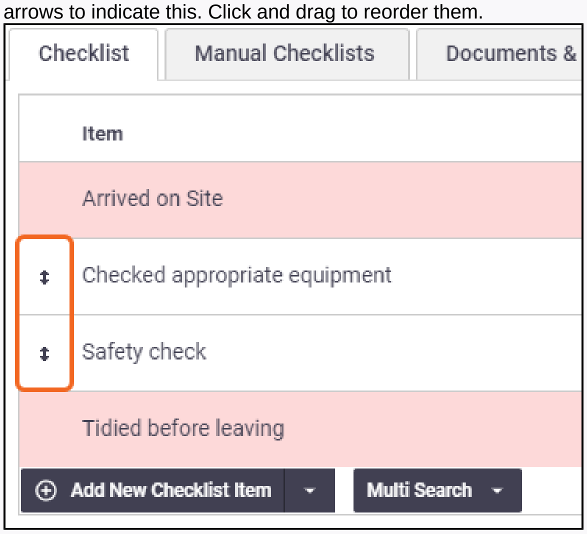
Checklist Items are completed by selecting a response which can be either PASS **(Y)**, FAIL **(N)** or NOT APPLICABLE **(N/A)**



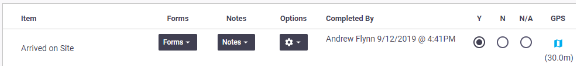
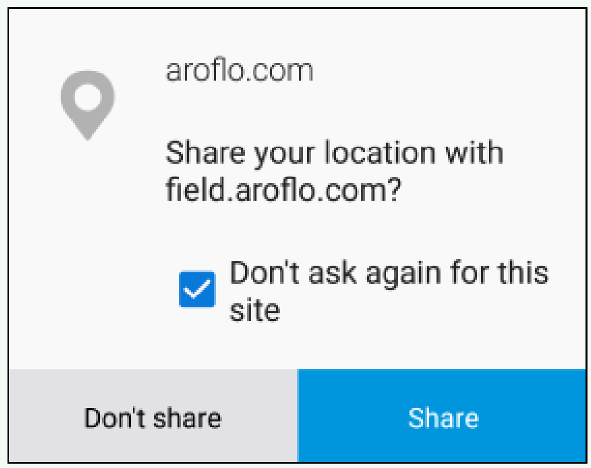
Any checklist item which is highlighted with a colour band must be marked with a response before the Task can be completed.




Checklist items that have been marked as sortable will have arrows to indicate this. Click and drag to reorder them.

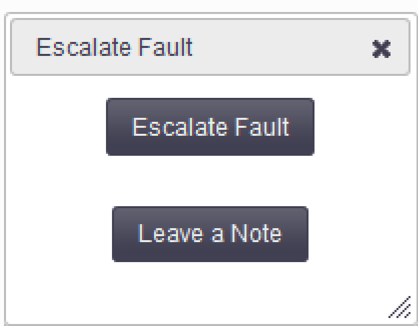



When selecting any response, the following details are also filled:

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>Completed By</td><td>Name of user who last changed / completed the Checklist Item, as well as the time and da</td></tr>
<tr><td>GPS</td><td>If enabled in Checklist item settings, GPS location where the Checklist Item was last chang<br>

<br>
Clicking  (map icon) will open a map showing the location.<br>
To ensure this function works, make sure the:<br>
• user card in Site Admin has Allow GPS Tracking enabled (see Feature Access tab)<br>
• user's mobile phone has GPS functions enabled, location sharing enabled for the wet carpark).<br>
Users will be asked the first time they log into AroFlo Field whether they want to enable location sharing. If they choose 'Don't share', and later want to enable location sharing, they can do so in their browser settings.<br>

</td></tr>
</table>

If a Checklist Item is marked as FAIL (N), you may also have two options shown (if setup in Checklist settings):

- **Escalate Fault:** allows you to create a new task that uses checklist items description as the **Task Identification**.
- **Leave a Note:** allows you to leave a small text note that is linked to the checklist item.



# Start / Stop Timer via Checklist

Your Site Administrator can set up your checklist items to automatically start or stop the labour timer when an item is marked **Y** (Yes/Pass). Once this feature is set up, users can start the labour timer as follows:

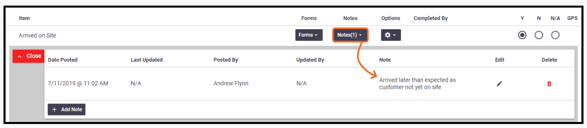
1. Select **Y** on the relevant checklist item.
2. **Save**. The labour timer starts.

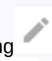
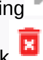
To stop the labour timer via a checklist item:

1. Select **Y** on the relevant checklist item.
2. On the Current Timer pop-up box, click the green button.
3. On the Labour Timer window, click **Stop Timer**.
4. Create a timesheet entry as per Task Worksheet Labour.

# Add and view checklist notes

Each Checklist Item allows you to add or view existing notes by pressing the **Notes** button. This might include details on why an Item was marked as a certain condition (such as marking it failed) or general notes about the Checklist Item when it was completed.




From here, click **Add Note** to add another checklist note. You can edit a note by pressing  (pencil icon). The **Last Updated** field will update accordingly. If you need to delete a note, click  (red trash can).

This functionality is also available in AroFlo Field.

**Permission Groups**

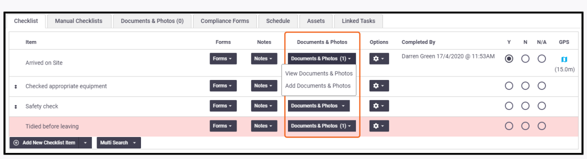
Anyone using default permission groups can view and add checklist notes. Supervisors will also be able to edit, and Managers will be able to edit and remove.

Custom permission groups.

# Add Documents and Photos

Adding documents and photos to checklist items can be useful. For example, if you need to fail a checklist item, you can attach a photo to show why.

Simply click the down arrow in the Documents & Photos area and **Add Documents & Photos** to upload a document and/or photo to the checklist item.



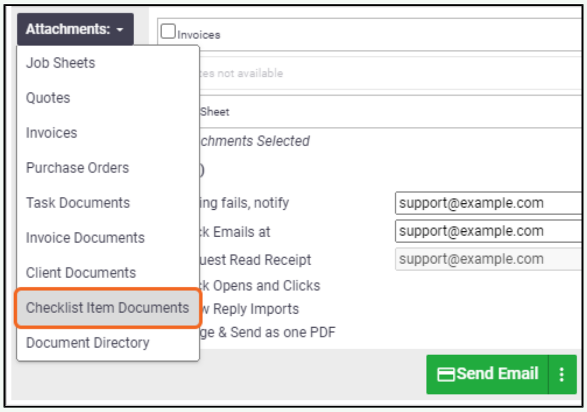

**Permission Groups**

Anyone using default permission groups can view and add checklist documents and photos. Supervisors will also be able to edit, and Managers will be able to edit and delete.

Custom permission groups.

**Email attachments**

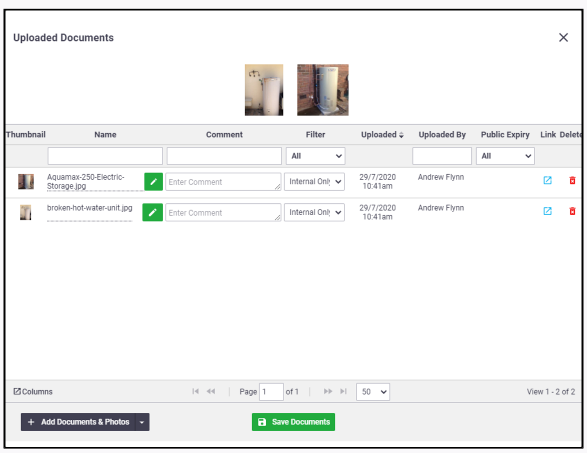
Documents and photos on checklist items can also be attached to task and invoice emails.




## View Documents and Photos

If a photo has been attached to a checklist item, a counter will display on the button to indicate how many documents and photos are attached. Click the down arrow and **View Documents & Photos** to view the attachments.

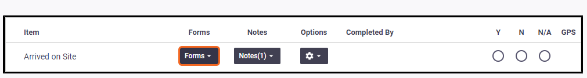
- Click the preview to expand the image, or click the thumbnail to open the full-sized image.
- You can also enter a comment relevant to the photo.
- If you want the image to be available for a task layout, you need to enable the Show Client/Contractor/All filter.
- If you need to delete the document or photo, click the (red trash can).




The Documents & Photos functionality is also available in AroFlo Field.

# Link a checklist item to a form

Each Checklist Item allows you to link existing forms such as Compliance Forms, OHS Checklists and Custom Forms. Selecting Forms allows you to **Create Form** (Add) or **View Forms** which are linked to that Checklist item.

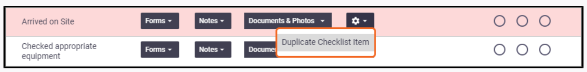


# Duplicate a checklist item

A checklist Item can be duplicated by clicking the (cog with arrow) icon and selecting **Duplicate Checklist Item**.

This is the fastest way to duplicate a Checklist item where multiple people are working on a step. Each technician can simply duplicate a Checklist Item and tick it off for themselves. Duplicating also retains any settings on the original (such as email or SMS on pass / fail / N.A).

It is also especially useful in scenarios where someone marks a Checklist Item as failed and leaves a note. A new user can review the note, duplicate the Item and update the Checklists with an ongoing record. By duplicating, different users can work on common Checklist Items.

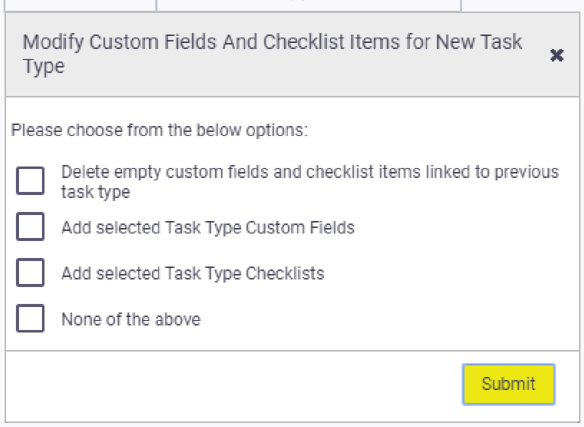



Watch this short video to show you how to duplicate a checklist item in both Field and Office.

## Changing task types

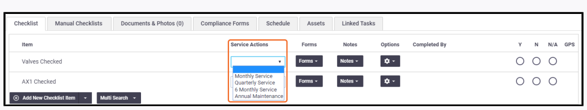
If you change the task type on an existing task, you will be given an option on how you want to proceed, depending on the scenario. You can choose more than one option, or choose 'None of the above'.

| Option | Description |
|---|---|
| Delete empty custom fields and checklist items linked to previous task type | Blank custom fields and unchecked checklist items will not carry across to the task. |
| Add selected Task Type Custom Fields | Custom fields belonging to the new task type will be added. Any of the previous task type's completed custom fields will remain visible, so no data is lost. |
| Add selected Task Type Checklists | Checklists belonging to the new task type will be added. Any of the previous task type's completed checklist items will remain visible, so no data is lost. |
| None of the above | Saves the new task type only and doesn't add any custom fields or checklists related to the new task type. |




## Service Actions

If a Service Action Group has been linked to the Checklist Template, a column will appear so a Service Action can be selected for each checklist item.




This feature can be especially useful where Items are changed on a very frequent basis. This could be during maintenance swap outs where it may not be worthwhile to maintain the changes in an Asset Register.

The checklist items listed could be the Items being changed frequently with Service Actions to add an Inventory Item, Form or Document for each.