

## HOW TO CONFIGURE CHECKLISTS

In Baseplan Enterprise, checklist functionality is divided into three main categories:

- **Basic:** This functionality is available to all customers.
- **Advanced:** This is a licensed functionality.
- **Take Five:** These checklists are configured through a system parameter in Baseplan Enterprise and actioned from the Service Mobility (SM) app.

Users can configure the following types of checklists in the system:

- **Service Safety Inspection:** Available for both Basic\* and Advanced Checklists. Used when processing service calls and service jobs, and can be accessed from the *Service Calls* and *Service Jobs* screens, respectively.
- **Equipment Inspection:** Available for Advanced Checklists only. Used when processing rental contracts, and can be pre or post rental inspections.

*\*Please refer to the [‘Basic vs Advanced Checklist Features’](#) matrix in the document for more information.*

**Software Version: 1901**

## TABLE OF CONTENTS

<b>BASIC VS ADVANCED CHECKLIST FEATURES</b> .....	<b>3</b>
<b>CONFIGURING TAKE FIVE CHECKLISTS</b> .....	<b>4</b>
<b>CONFIGURING BASIC AND ADVANCED CHECKLISTS</b> .....	<b>5</b>
Examples .....	8
Service Safety Inspection Checklists.....	8
Equipment Inspection Checklists .....	10
<b>COMPLETING CHECKLISTS IN BASEPLAN ENTERPRISE</b> .....	<b>12</b>
Take Five Checklists .....	12
Basic Checklists .....	12
Advanced Checklists .....	12
Service Safety Checklists.....	12
Equipment Inspection Checklists .....	14
<b>COPYRIGHT</b> .....	<b>15</b>

## BASIC VS ADVANCED CHECKLIST FEATURES

The following table highlights the key differences between Basic and Advanced checklists. Advanced Checklists give users more options when configuring checklists and provide additional features when completing checklists.

FEATURE	ADVANCED CHECKLIST	BASIC CHECKLIST
Configure checklist per Equipment Category	Y	
Configure checklist per Equipment Type	Y	
Configure checklist per Equipment Make	Y	Y*
Configure checklist per Equipment Model	Y	Y
Configure checklist per Equipment Number	Y	Y
Configure checklist per Service Job Category	Y	
Configure checklist per Service Job Type	Y	
Configure checklist per Service Job Reason	Y	
Configure checklist per Inspection Type	Y	
Service Jobs Checklists – Configuration as well as answering and submitting checklist	Y	Y
Inspection Checklists – Configuration as well as answering and submitting checklist	Y	
Modifying Checklists and Recording Responses from the Service Jobs	Y	
Modifying Checklists and Recording Responses from the Equipment Inspection	Y	
Capture signature when completing a service call or service job with checklists (SM app)	Y	Y
Capture signature when completing an inspection with checklists (BMA)	Y	
Enter comments against a checklist point (Enterprise, BMA and SM apps)	Y	
Capture photos against a checklist point (BMA and SM apps)	Y	
Attach documents against a checklist point (Enterprise, BMA and SM apps)	Y	

\* When configuring basic checklists, if Equipment Make has a value then Equipment Model must also have a value.

Please refer to the 'How to Use Service Mobility Guide' for information on the SM app.

## CONFIGURING TAKE FIVE CHECKLISTS

1. From the Menu, select **Utilities > Configuration > Parameters**
2. Display the **FSM Take Five Items** parameter
3. Enter the checklist details

CAPTION	DESCRIPTION
FSM Take Five Items	<p>Items to be shown on the Take Five screen in SM that technicians must complete prior to commencing work.</p> <p>Each item must be separated by a semicolon (;). The text should not include any character that can make an XML string invalid, such as &lt;, &gt;, &amp;</p> <p><b>For example:</b></p> <p>Am I Fit for Work (aware, rested and alert, not stressed or fatigued)?; Do I understand the work, scope and methods?; Do I have the required skills, training, experience &amp; licenses to do the task?; Are my tools &amp; equipment right for the task and in a safe, useable condition?; Can I control any potential environmental impacts?; Have I communicated with other workers that may be affected by this task?</p>

## CONFIGURING BASIC AND ADVANCED CHECKLISTS

Checklists are created as part of workplace safety to ensure that the equipment is in good working order. Checklists can also be used to review the condition of equipment prior to and when returned from rental. Each checklist may contain points (questions) to assess if the equipment is safe for operation, if the technician has the skills required to operate the equipment, if the technician has completed all the preliminary checks, and more.

Baseplan Enterprise offers two types of checklists – ‘Service Safety Inspection’ (Safety Inspection) and ‘Equipment Inspection’ (Fleet Inspection). Each checklist contains the following:

- Checklist Points: These are the questions / checks that need to be completed. **For example:** ‘Check dust and particle accumulation’, ‘Check brake fluid’, ‘Coupling devices and connectors tested’.
- Checklist Groups: Points belonging to a particular area are organised under a common group with a unique group code. **For example:** The points ‘Seat belts not frayed or cracked’ and ‘Locks on both doors’ belong to Group ‘Driver Safety’ and are identified by the Group Code ‘DR-SF’.

Both Basic and Advanced checklists are configured from the *Checklist Upload* screen.

1. From the Menu, select **Utilities > Configuration > Checklist Upload**

This will open the *Checklist Upload* screen, allowing users to upload CSV files containing checklist groups and points.

2. Click EXPORT CHECKLIST GROUPS AND POINTS from the *Import / Export Checklist Groups and Points* panel

This will export all the existing checklist groups and points from Baseplan Enterprise to a CSV file. The following columns will be exported:

COLUMN	DESCRIPTION
Group Code	<p>Every checklist will have a Group Code.</p> <p><b>For example:</b> DR-SF</p>
Group Title	<p>All the checklist points within a Group Code (checklist group) will have the same Group Title.</p> <p><b>For example:</b> There are two checklist points in the Group Code 'DR-SF'. The Group Title of the first point is entered as 'Gate Check' and that of the second point is 'Interior Check'. The system will apply 'Gate Check' as the Group Title for both checklist points.</p>
Group Sort Order	<p>All the checklist points within a Group Code (checklist group) will have the same Group Sort Order.</p> <p>If multiple Group Codes share the same sort order, the system will use the row number to determine the correct sort order.</p>
Customer Signature Required Before Checklist Submission	<p>Acceptable values are 'Yes' or 'No'. If any row within the Group Code has a value 'Yes', then all rows within the group code will be set to 'Yes' when saving to the database.</p>
Checklist Point Title	<p>Comprehensive title for each checklist point.</p> <p><b>For example:</b> Floor Inspection.</p>
Checklist Point Explanation	<p>Detailed description of each checklist point.</p> <p><b>For example:</b> Inspect platform floor for cracks.</p>
Checklist Point Sort Order	<p>Each checklist point can have its own sort order.</p> <p>If multiple checklist points share the same sort order, the system will use the row number to determine the correct sort order.</p>
Is Answer Mandatory	<p>Determines if a checklist point must be answered. The acceptable values are 'Yes' and 'No'. All mandatory points must be answered to post service jobs or complete inspections.</p>
Expected Duration for Completion	<p>The expected duration for completion will be in minutes (per checklist point).</p> <p><b>Note:</b> This is an optional spreadsheet column.</p>

3. Click IMPORT CHECKLIST GROUPS AND POINTS from the *Import / Export Checklist Groups And Points* panel.

This will import all the information from the CSV file to Baseplan Enterprise.

Information from the imported file will override existing checklist information in the system.

To ensure correct checklists are generated, equipment, service job and/or inspection details must be allocated to the relevant checklist groups using the Checklist Allocation Template.

4. Click EXPORT CHECKLIST ALLOCATION TEMPLATE from the *Import / Export Checklist Allocation Template* panel

This will export the columns, Checklist Type, Checklist Grouping Code, Equipment Category, Equipment Type, Equipment Make, Equipment Model, Equipment Number, Service Job Category, Service Job Type, Service Job Reason and Equipment Inspection Type.

5. Enter the Checklist Type to be generated, i.e. 'Equipment Inspection' or 'Service Safety Inspection'

**Note:** Leave this column blank if a checklist group applies to both the checklist types.

6. Enter the relevant Checklist Grouping Code

This will determine which points are displayed in the checklist.

7. Use one or more of the remaining columns to allocate the relevant equipment, service job or inspection criteria to the checklist group

**For example:** The Checklist Type is 'Service Safety Inspection', Checklist Grouping Code is 'DR-SF' and 'Toyota' is entered in the Equipment Make column. This means a checklist will be generated with all the points within the Group 'DR-SF' each time a service call or service job is created for any equipment item that has the **Make** 'Toyota'.

The criteria available for allocation depends on the type of checklist functionality used, i.e. Basic or Advanced. [Please refer to the 'Basic vs Advanced Checklist Features' matrix in the document for more information.](#)

8. To upload the allocation template, click IMPORT CHECKLIST ALLOCATION TEMPLATE in the *Import / Export Checklist Allocation Template* panel of the *Checklist Upload* screen

In case there are any validation errors, the system will reject the entire file and will not process any information. The error will be reported to the user.

## Examples

### Service Safety Inspection Checklists

When a service call or job is created, the system also creates a Service Safety checklist using the checklist template for 'Service Safety Inspection'.

In the example below, we demonstrate how to configure a checklist so that it is generated for a service job for equipment number '1003240'.

1. From the Menu, select **Utilities > Configuration > Checklist Upload**
2. Click EXPORT CHECKLIST GROUPS AND POINTS to view the existing groups and points in the system

The checklist points are organised as shown below:

Group Code	Group Title	Group Sort Order	Customer Signature Required Before Checklist	Checklist Point Title	Checklist Point Explanation	Checklist Point SortOrder	Is Answer Mandatory (Yes or No)	Expected Duration For Completion (in Minutes)
3UUU	Safety Inspection	1	Yes	Driver door	Check for driver data fit out	1	No	5
3UUU	Safety Inspection	1	Yes	Passenger door driver side	Check door handles	2	No	3
3UUU	Safety Inspection	1	Yes	Front tyre	Is it flat	3	No	5
PH-SI	Safety Inspection	3	No	Seat cushion	Seat cushion in good condition	1	No	2
PH-SI	Safety Inspection	3	No	Interior check	Interior is intact	2	No	3
PH-SI	Safety Inspection	3	No	Floor intact and self-draining	Inspect platform floor to ensure it is in good condition	3	No	3
PH-SI	Safety Inspection	3	No	Gate installed and latching correctly	Inspect gate to ensure that is working correctly	4	No	4
PH-SI	Safety Inspection	3	No	Lights	Check light fittings	5	No	4

As part of this example, we want to ensure that when a service job is created for equipment number '1003240', a checklist is generated with five specific points. All these points are grouped under the Group Code 'PH-SI'.

3. Save the checklist as a .CSV file
4. Click IMPORT CHECKLIST GROUPS AND POINTS in the *Checklist Upload* screen.
5. Click EXPORT CHECKLIST ALLOCATION TEMPLATE in the *Checklist Upload* screen
6. Enter the details in the following columns of the spreadsheet as shown below:

Checklist Type	Checklist Grouping Code	Equipment Category	Equipment Type	Equipment Make	Equipment Model	Equipment Number	Service Job Category	Service Job Type	Service Job Reason	Equipment Inspection Type
SafetyInspection	3UUU	22	IC2	ABC				External		
SafetyInspection	PH-SI					1003240		External		

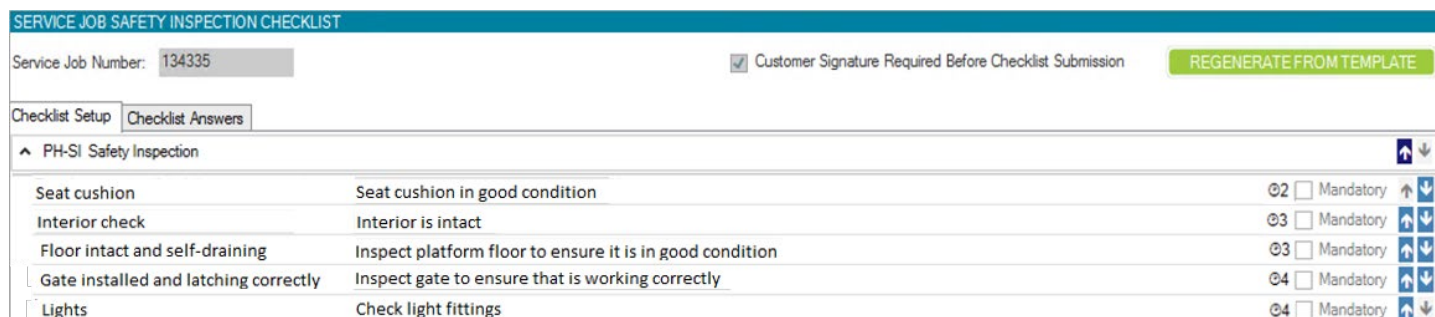
**Note:** For basic checklists, only the columns **Checklist Type**, **Checklist Grouping Code**, **Equipment Make**, **Equipment Model** and **Equipment Number** will be relevant in the allocation template.

7. Save the allocation template as a .CSV file





To upload the edited allocation template, click **IMPORT CHECKLIST ALLOCATION TEMPLATE** in the *Checklist Upload* screen.

A service job is created for equipment item '1003240'. Thus, the system generated the Service Safety checklist shown below:



SERVICE JOB SAFETY INSPECTION CHECKLIST																												
Service Job Number: 134335		<input checked="" type="checkbox"/> Customer Signature Required Before Checklist Submission	<a href="#">REGENERATE FROM TEMPLATE</a>																									
<div style="display: flex; border-bottom: 1px solid #ccc;"> <span style="border: 1px solid #ccc; padding: 2px;">Checklist Setup</span> <span style="border: 1px solid #ccc; padding: 2px; margin-left: 5px;">Checklist Answers</span> </div>																												
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>PH-SI Safety Inspection</span> <span>↑ ↓</span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tbody> <tr> <td style="width: 20%;">Seat cushion</td> <td style="width: 60%;">Seat cushion in good condition</td> <td style="width: 10%;">02</td> <td style="width: 10%;"><input type="checkbox"/> Mandatory</td> <td style="width: 10%; text-align: right;">↑ ↓</td> </tr> <tr> <td>Interior check</td> <td>Interior is intact</td> <td>03</td> <td><input type="checkbox"/> Mandatory</td> <td style="text-align: right;">↑ ↓</td> </tr> <tr> <td>Floor intact and self-draining</td> <td>Inspect platform floor to ensure it is in good condition</td> <td>03</td> <td><input type="checkbox"/> Mandatory</td> <td style="text-align: right;">↑ ↓</td> </tr> <tr> <td>Gate installed and latching correctly</td> <td>Inspect gate to ensure that is working correctly</td> <td>04</td> <td><input type="checkbox"/> Mandatory</td> <td style="text-align: right;">↑ ↓</td> </tr> <tr> <td>Lights</td> <td>Check light fittings</td> <td>04</td> <td><input type="checkbox"/> Mandatory</td> <td style="text-align: right;">↑ ↓</td> </tr> </tbody> </table> </div>				Seat cushion	Seat cushion in good condition	02	<input type="checkbox"/> Mandatory	↑ ↓	Interior check	Interior is intact	03	<input type="checkbox"/> Mandatory	↑ ↓	Floor intact and self-draining	Inspect platform floor to ensure it is in good condition	03	<input type="checkbox"/> Mandatory	↑ ↓	Gate installed and latching correctly	Inspect gate to ensure that is working correctly	04	<input type="checkbox"/> Mandatory	↑ ↓	Lights	Check light fittings	04	<input type="checkbox"/> Mandatory	↑ ↓
Seat cushion	Seat cushion in good condition	02	<input type="checkbox"/> Mandatory	↑ ↓																								
Interior check	Interior is intact	03	<input type="checkbox"/> Mandatory	↑ ↓																								
Floor intact and self-draining	Inspect platform floor to ensure it is in good condition	03	<input type="checkbox"/> Mandatory	↑ ↓																								
Gate installed and latching correctly	Inspect gate to ensure that is working correctly	04	<input type="checkbox"/> Mandatory	↑ ↓																								
Lights	Check light fittings	04	<input type="checkbox"/> Mandatory	↑ ↓																								

The *Checklist* screen includes the following components:

- The checkbox **Customer Signature Required Before Checklist Submission** is derived from the Checklist Groups and Points file. If at least one checklist group has the **Customer Signature Required Before Checklist Submission** column set to 'Yes', then the checkbox is checked and locked.
- The security-controlled button, **REGENERATE FROM TEMPLATE** can be used to update an existing template with the latest template. This overwrites any existing checklists configured for the job and responses. A warning message is displayed before the responses are overwritten.
- All the checklist points derived from the template are organised by groups in separate, collapsible panels.
- A numeric icon next to the checklist point indicates the **Expected Duration for Completion** derived from the Checklist Groups and a Points file. **For example:** In the example above, the icon  next to the first checklist point indicates that the technician should be able to inspect the platform floor in 3 minutes.
- Checklist points that have the **Is Answer Mandatory** column set to 'Yes' in the Checklist Groups and Points file, will have the **Mandatory** checkbox checked
- For Advanced Checklists, the groups and points can be sorted by selecting the row and clicking the UP and DOWN arrow buttons 

## Equipment Inspection Checklists

In the example below, we describe how a checklist is generated for an equipment inspection.

In the Groups and Points file below, the Group Code 'DR-IN' is related to inspecting some key areas of the equipment item. Three checklist points are assigned to this group:

- Driver Door
- Check Lights
- Front Tyres

Group Title	Group Sort Order	Customer Signature Required Before Checklist Submission (Yes or No)	Checklist Point Title	Checklist Point Explanation
Fleet Inspection	1	Yes	Driver Door	Check if door locks are secure
Fleet Inspection	1	Yes	Check Lights	Check head lights
Fleet Inspection	1	Yes	Front Tyres	Check tyre pressure
Safety Inspection	2	No	Guard Rails Intact	Check basket/platform for dents
Safety Inspection	2	No	Seat Cushions	Check for tears
Safety Inspection	3	No	Interior Check	Complete interior check
Safety Inspection	3	No	Gate Latches	Inspect gate to ensure the latches are work

The allocation template below shows that an Equipment Inspection checklist will be generated for the Group 'DR-IN' when an inspection record is created for an equipment item of type 'IC2':

Checklist Type	Checklist Grouping Code	Equipment Category	Equipment Type	Equipment Make	Equipment Model	Equipment Number	Service Job Category	Service Job Type	Service Job Reason	Equipment Inspection
FleetInspection	DR-IN	22	IC2	JLG	02-2FGC31	1003240	SI	External	Safety	
SafetyInspection	DR-IN							External		
SafetyInspection	CS-SI	CH	IC3	Toyota				External		
SafetyInspection	PH-SI	CH	IC2					Internal		

When this inspection record is created for the equipment, clicking the CHECKLIST button on the *Equipment Inspection* screen will display the checklist below:

**EQUIPMENT INSPECTION CHECKLIST**

Equipment Inspection Number: 
 Customer Signature Required Before Checklist Submission
REGENERATE FROM TEMPLATE

Checklist Setup

Checklist Answers

^ DR-IN Fleet Inspection
↑ ↓

Driver Door	Check if door locks are secure	⊙5	<input checked="" type="checkbox"/> Mandatory	↑ ↓
Check Lights	Check head lights	⊙8	<input checked="" type="checkbox"/> Mandatory	↑ ↓
Front Tyres	Check tyre pressure	⊙10	<input checked="" type="checkbox"/> Mandatory	↑ ↓

**Note:** For basic checklists, this screen will not display. Users must click the DISPLAY INSPECTION SHEET button on the *Equipment Inspection* screen. This will load the checklist added to the Equipment Make/Model (**Inspection Report File** field) as a PDF.

## COMPLETING CHECKLISTS IN BASEPLAN ENTERPRISE

### Take Five Checklists

These checklists can only be completed from the SM app. The responses can then be viewed in Baseplan Enterprise by displaying the relevant service job and selecting **Actions > Take Five Status**.

*Please refer to the 'How to Use Service Mobility App' guide for more information.*

### Basic Checklists

Responses can only be added from the SM app. The responses can then be viewed in Baseplan Enterprise by displaying the relevant service job and selecting **Actions > Service Job Checklist Responses**.

*Please refer to the 'How to Use Service Mobility App' guide for more information.*

### Advanced Checklists

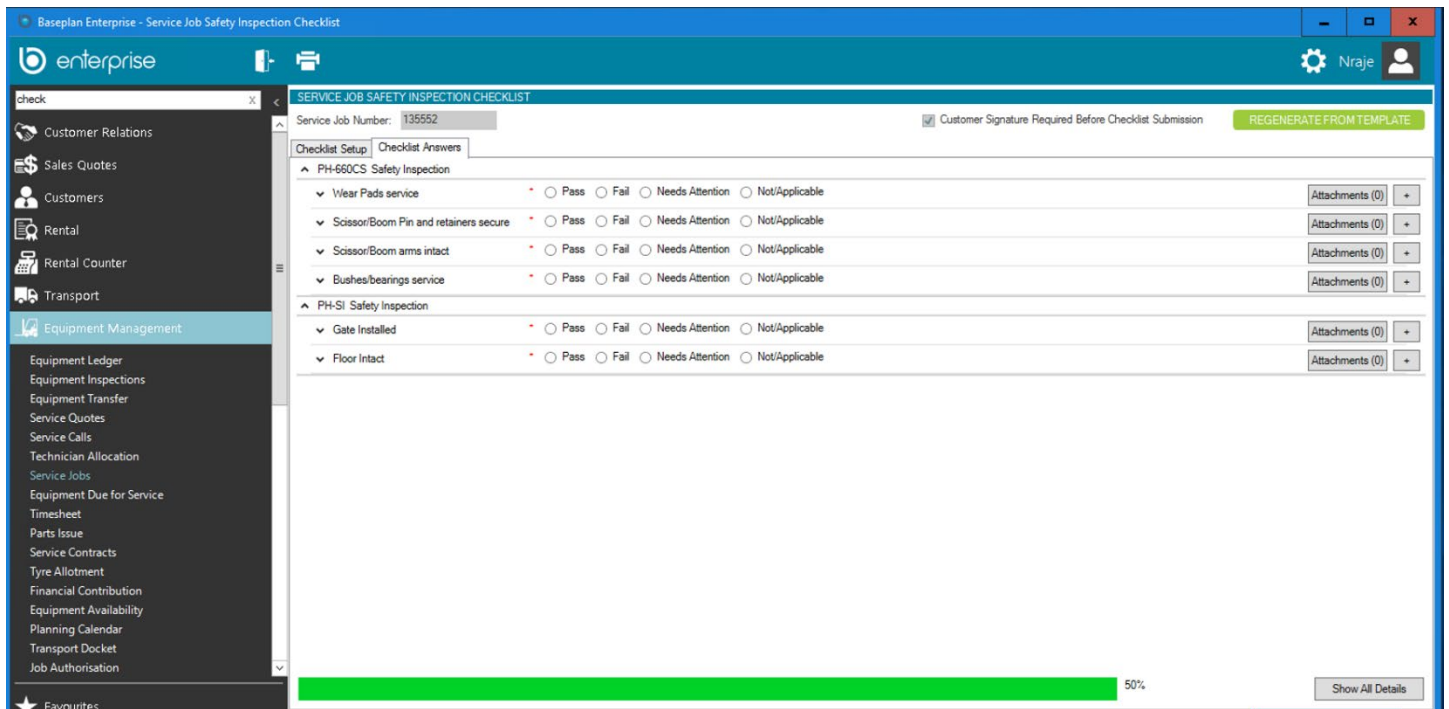
Responses can be added from the SM and BMA app as well as from Baseplan Enterprise.

### Service Safety Checklists

1. From the Menu, select **Equipment Management > Service Jobs** or **Equipment Management > Service Calls**
2. Display the relevant service job / service call
3. Select **Service Mobility > Service Job Checklist Responses**

This will display the *Service Job Safety Inspection checklist* screen.

4. Click on the *Checklist Answers* tab



Mandatory checklist points will be indicated by an asterisk ( \* ).

5. Select any of the following responses for the point:

- Y** (Pass)
- N** (Fail)
- A** (Needs Attention)
- N/A** (Not Applicable)

The system will create Outstanding Item(s) for 'Needs Attention' responses.

6. If required, enter comments by clicking on the expander  next to the relevant checklist point. Alternatively, click the SHOW ALL DETAILS button at the bottom of the screen to expand all points at once.

7. If required, add photos or documents to the checklist point by clicking the + button next to it

**Note:** Photos and attachments will be saved to the location configured in the **Central Path** parameter.

Baseplan Enterprise users must have access to the security option, 'RecordChecklistAnswersComments' in order to be able to add responses, comments or attachments to the checklist point.

Once the checklist responses are entered, the service job can be posted.

### Equipment Inspection Checklists

1. From the Menu, select **Equipment Management > Equipment Inspections**
2. Display the relevant inspection
3. Click CHECKLIST at the bottom of the screen

This will display the *Equipment Inspection Checklist* screen.

This screen will display the checklist generated from the template for the inspection record.

4. Record responses, comments and/or attachments the same way as that for [Service Safety Inspection checklists](#)

Please refer to the 'How to Process and Complete Equipment Inspections in BMA' guide for information on processing advanced checklists from BMA.

## COPYRIGHT

© 2019 Baseplan Software Pty Ltd or one of its subsidiaries. This material is protected by copyright.

Information from the document, as excerpts or in entirety, may be republished or reprinted only for fair use in connection with licenced usage of Baseplan's products, and with appropriate attributions to Baseplan Software Pty Ltd. Apart from this and other than for purposes of and subject to the conditions prescribed under the Copyright Act, no part of it may in any form or by any means (electronic, mechanical, micro-copying, photocopying, recording or otherwise) be reproduced, stored in a retrieval system or transmitted without prior written permission from the document controller.

Product or company names are trademarks and/or registered trademarks of their respective holders.