Checklists Overview

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Tags: checklists check item

A checklist is a standard list of checks that is used for more advanced data capture with the ability to approve the checklist result. It defines a sequence of items to be checked and those items are one of the following types: attributes (record of a failure, e.g., true/false or count of failures), variables (things that you measure) or text.

A checklist can be configured for a product type and may be referenced by any product of that type. For example, you may create a checklist for the product type bottles and it could be referenced in the manufacture of big bottles, medium bottles and small bottles.

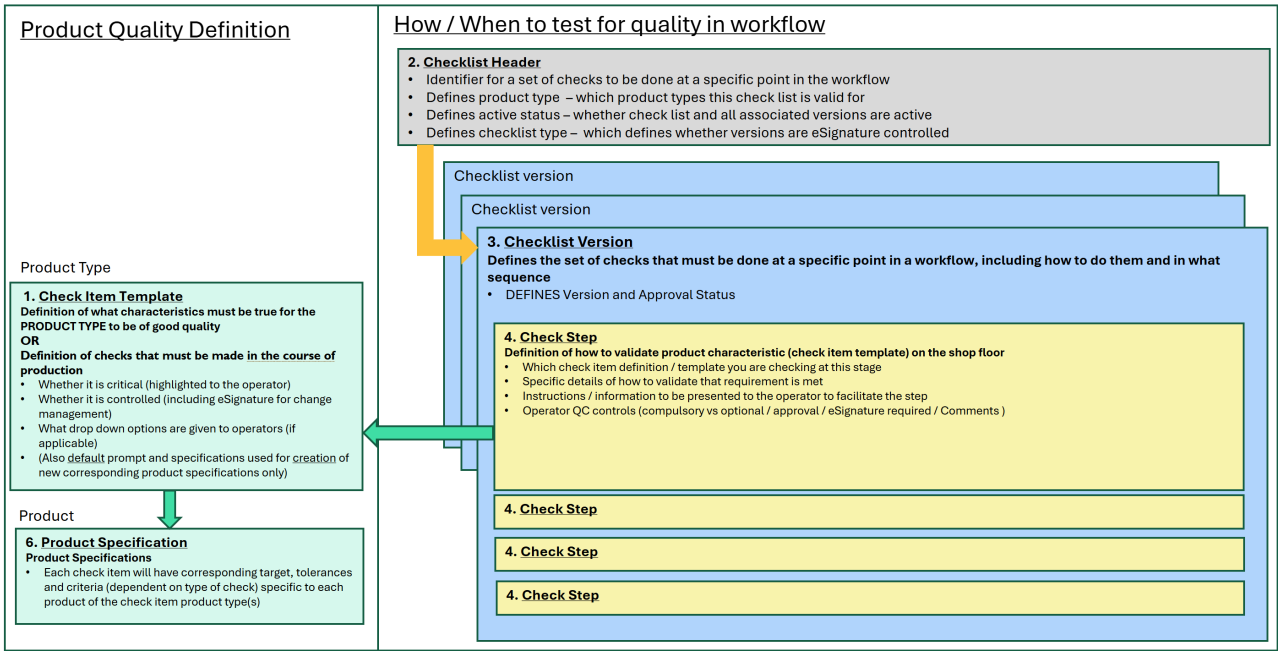
Users must have the required permissions to create, edit and approve a checklist and the checklist results. Note that users who capture checklist results will generally not have the permissions to create checklists.

Checklist Structure

Checklist components

Checklists consist of five key parts. The diagram below gives an overview of how these parts interact.

- Checklist header: This is the overarching container for all versions and steps that will be referenced in a workflow action for a product of a specified type.
- Checklist version: When you create a new checklist, an unapproved first version of the checklist is automatically created.
- Check item template: The list of characteristics that can be checked for a product type.
- Product specification: The tolerances for each of the characteristics for each product in the product type.
- Checklist steps: These are individual actions or checks within the checklist. Each step is for a predefined attribute, variable or text parameter which defines the type of data to be collected and its default specifications.



Build a Checklist

The process for creating a checklist is as follows:

- Create a check item template to define what you are checking. This will also create default criteria/specifications. A

template can be one of three types: attribute, text, or variable.

1. Attribute: Attributes are the presence of defects either as a pass/fail or as a count of failures.
    a. Pass/fail: Records the count of pass/fail samples for Statistical Process Control (SPC) sampling.
    b. Numeric: A count of:
        i. Defects, e.g., scratches.
        ii. Defectives, e.g., scratched items (generally for SPC).
2. Text: This allows for free text input or an option list of text items.
3. Variable: This allows for entering a numeric value with upper and lower limits.

- Link template to product type: Templates must be associated with a specific product type or product types to ensure relevant specifications are created (note that when you create this link the system generates product specifications with default settings). Controlling this link ensures that only relevant specifications are generated, e.g., paint defect check would not be relevant for an unpainted product type.
- Create a Checklist: Once templates are defined, a new checklist is created.
    1. Create the checklist header and checklist version which specifies the checklist type, product type, general instructions, e-signature requirements, approval status and general documents.
    2. Add Steps: Steps are added to the checklist, copying the appropriate templates. Note that you can then adapt the steps to specific setup you want by overwriting the template default settings. The sample detail defines the exact sequence in which the individual sample checks should be completed.
    3. You can also add specific instruction texts, documents, required sample sizes and additional controls at this stage.
- Update product specifications where these differ from the default for specific products.

Check Item Template

Check items appear on checklists and are defined in the **Check Item Template** screen. For more information, see Check Item Template.

Checklist Approval Process

- Un-approved Status: Checklists are initially created in an un-approved status.
- Approval Process: Checklists require approval before being added to workflows.
- Workflow Integration: Approved checklists can be added to specific workflow operations to ensure relevant checks are performed at appropriate stages.

Major and Minor Checklist Versions

Checklists are versionable to help organise your checklists and support change control. They feature both major and minor versions.

Minor versions allow you to specify the use of the latest approved minor version for a given major version in workflow actions.

Major versions are intended for significant changes to checklists, providing a structured way to manage and implement major updates.