

# Checkware

## Quick start guide: Administration



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# 1 Overview

## 1.1 Foreword

This quick start guide addresses the administration of Checkware. Its aim is for the administrator to be able to make the right checklists available to the right users. For this purpose, the following topics will be covered:

- Uploading Checklists to Checkware
- Editing the organization structure
- Assigning checklists to the organization structure
- Assign folders to the organization structure via role

For questions about user administration—how to create new users, how to authorize them, etc.—please refer to the document "Quick Start: User Creation" available from New Solutions.

## 1.2 Workflow overview

In order for your users to be able to fill out checklists in Checkware, these checklists must first be uploaded as templates. Each time a user opens a checklist, these templates are then used to create a copy for the user to fill out.

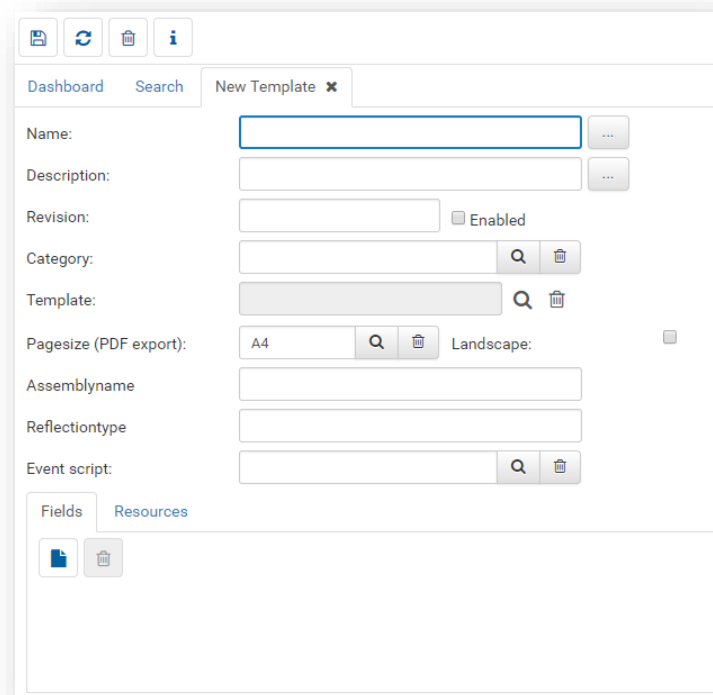
However, only the checklists that are enabled for him via the organization structure are shown to him. For this, you divide your organization structure as required and create different areas to which you assign checklists. You then assign these areas to the roles that your users own. As a result, the checklists are only shown to specific users and you can control in detail which user can or should fill out which checklist.

## 2 Uploading checklists



As mentioned earlier, all checklists that you fill out with Checkware are based on templates. These templates can be created with [Checkware Designer](#) and are saved as HTML files, which you then upload to Checkware.

If you want to create a new template, proceed as follows:

1. In the ribbon menu at the top of the page, click on Administration → Templates → New.
2. This will open the window New Templates.






*An empty template*

3. Fill in all necessary fields:
  - a. Name – enter a name for the template. The checklist will be shown in Checkware under this name.
  - b. Template – click on the  button. A dialog opens in which you can select the HTML file of your template on your computer.
4. Fill in further fields (see below).
5. Finally, click on the  button to save the template.

It will take a moment until the checklist has been uploaded and processed. A window will then open informing you which fields of the checklist already exist in the system and which have been newly created. Please refer to the Checkware User Manual for more information on fields and how to edit them.

The different fields have the following meanings:

<b>Name</b>	The name under which the template and all checklists based on it are shown. The  button opens a dialog where you can add translations for other languages. (Currently only English supported.)
<b>Description</b>	In dieses Feld können Sie eine nähere Beschreibung der Checkliste eingeben. This  button also opens the dialog where you can enter translations for other languages. (Currently only English supported.)
<b>Revision</b>	When you edit a checklist and upload a newer version, you can use this field to record the versioning.
<b>Enabled</b>	This checkbox indicates whether this checklist / revision is activated. <b>If this checkbox is not checked, the checklist will not be displayed to the users.</b>
<b>Category</b>	Here you can assign the checklist to a category.
<b>Template</b>	Here you can upload the checklist created with Checkware Designer as an HTML file. Clicking on  opens a file selection dialog in which you can search and select the checklist on your PC.
<b>Page size (PDF export)</b>	You can print checklists, and this setting determines how large the checklist is printed. The options are A3, A4, A5 and Letter.
<b>Assembly name</b>	(Not necessarily displayed.) If your version of Checkware has specific functionality, it may be necessary to load certain program parts. This setting is part of this process. Usually, you will not need to change this setting.
<b>Reflection type</b>	(Not necessarily displayed.) If your version of Checkware has specific functionality, it may be necessary to load certain program parts. This setting is part of this process. Usually, you will not need to change this setting.
<b>Event script</b>	(Not necessarily displayed.) With this setting you can load a script that allows you to react to certain events within the checklist. Usually, you will not need to change this setting.

At the bottom you can find the two tabs "Fields" and "Resources". These are not described in this Quick Start Guide. Please refer to the Checkware User Manual for more information.

### 3 Editing the Organization Structure

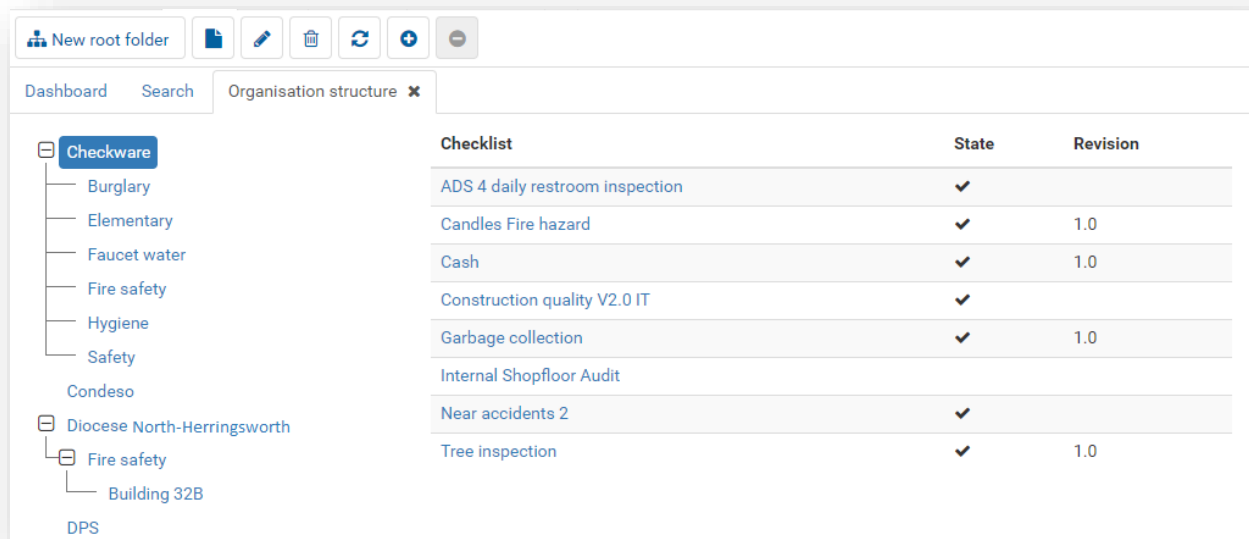
The checklists in Checkware are arranged in the organization structure. The organization structure allows you to flexibly assign checklists to your desired areas, so that you can find the checklists where you expect them to be, and that you can allow access to the checklists only to those employees who need them.

Let's take an example: Let's assume you work in a chromatography laboratory that has 2 areas, an HPLC area and a GC area. The equipment for HPLC is maintained and tested according to procedures that are different from those for GC equipment, and your laboratory technicians are also specialized in the respective type of analysis.

In this case, you would divide the organizational structure for your laboratory into HPLC and GC, assign the checklists to the respective area, and then create a role for HPLC and a role for GC that are assigned to the respective organization structure. This would give HPLC staff access to only the checklists that are relevant to them, and the same goes for GC staff.








To edit your organization structure, proceed as follows:


1. Click on Administration → Organization structure.
2. the tab "Organization structure" appears, where you can make all desired changes.



The tab Organization Structure

Available buttons and their effects:

 New root folder	<p>Use this button to add a new root folder, such as "Checkware" and "Condeso" in the figure on the previous page.</p>
	<p>This adds a new subfolder to the selected root folder or subfolder. "Fire safety" and "Building 32B" are examples in the figure above.</p>
	<p>If you click this button, an editing dialog opens in which you can change the name of the folder you have selected.</p>
	<p>With this button you can remove a folder from the folder structure. <b>Warning:</b> All subfolders will also be deleted!</p>
	<p>With this button you can refresh the view. If, for example, another administrator is working on the folder structure, you can make the changes visible.</p>
	<p>With this button you can assign a checklist to the selected folder. It then appears in the table in the right half of the tab and is then activated for the assigned users.</p>
	<p>This button removes the selected checklist from its folder.</p>

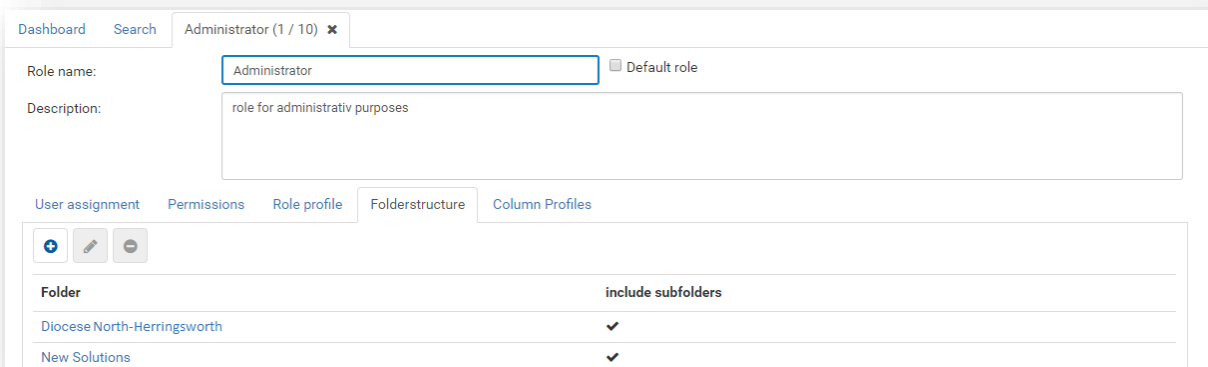
*Note: The organization structure can be nested a maximum of 5 levels deep. When reaching 5th level within a folder structure, the  button will be grayed out and no further level can be added.*

*Note: You can always assign a checklist to multiple folders in the organization structure.*


## 4 Assign a folder structure to a role

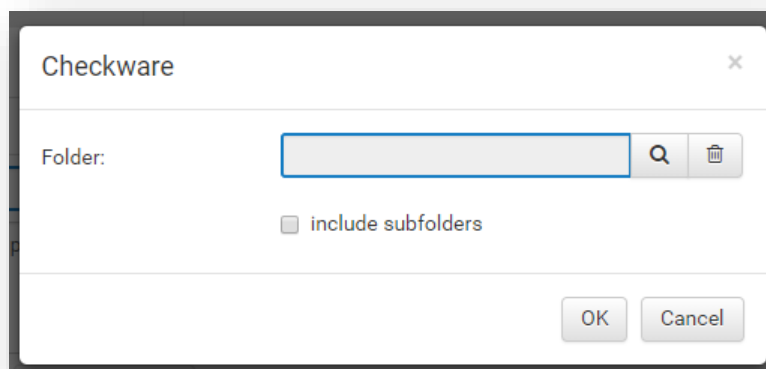
Now that the organization structure has been set up and the checklists are assigned, the roles still need to be adjusted so that the checklists are shown to the users.

1. Click on Administration → User Administration → Roles → Search (resp. New if you want to add a new role).
2. Open the desired role.
3. Select the Tab Folder Structure.



*Tab Folder structure in the Administrator role*

4. Now click the  button.
5. A dialog appears in which you can select the folder that you want to activate for the role.



6. If you want to include all subfolders, check the corresponding checkbox.
7. When you're finished, click OK.
8. Repeat the process for all folders you want to activate for this role.

Every user who owns this role can now see the checklists of the assigned roles.