

## Checkware-App – Digital Checklist Manager

### User Manual



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Checkware-App – Digital Checklist Manager .....	1
1. Introduction.....	3
1.1 Manual installation (Windows 10) .....	3
2. Login .....	3
2.1 Initial Login.....	3
2.2 Status of the synchronization process .....	7
3. Fill in checklists .....	9
3.1 My checklists .....	9
3.2 Incomplete checklists .....	12
3. Tasks.....	12
4.1 Open Tasks (Open).....	13
4.2 Overdue Tasks.....	13
4.3 Edit Tasks .....	13
4.4 Completed Tasks (Done).....	14

## User Manual

### 1. Introduction

The online-system of Checkware can be accessed by a web browser of your choice and requires a stable server connection. Checkware-App, however, allows you to fill in a checklist on your mobile device - even without a stable server-connection (Offline-mode). Checkware-App will periodically attempt to reconnect to the server, transferring completed checklists or obtaining new checklist-templates and tasks to or from the server. Checkware-App uses the same credentials that you would use with the online-system. After the app has been initialized, you do have the possibility, however, to assign a PIN to your account, making the authentication-process much more convenient. Please keep in mind that the first login requires you to have a server connection in order to verify the user and register your credentials for the synchronization-process.

#### 1.1 Manual installation (Windows 10)

Make sure you have either of the options “Sideload apps“ or “Developer mode“ enabled in your system-settings.

- Go to “Start” – “Settings” – “Update & Security” – “For developers”. Check either “Sideload apps” or “Developer mode”.
- Extract the app and navigate to its folder. Right-click on the file “Add-AppDevPackage.ps1” and click “Run with PowerShell”.
- Follow the instructions provided by PowerShell and confirm tasks if prompted to do so.
- After a successful installation, the app will be available in your App-Overview under the name “Checkware”.

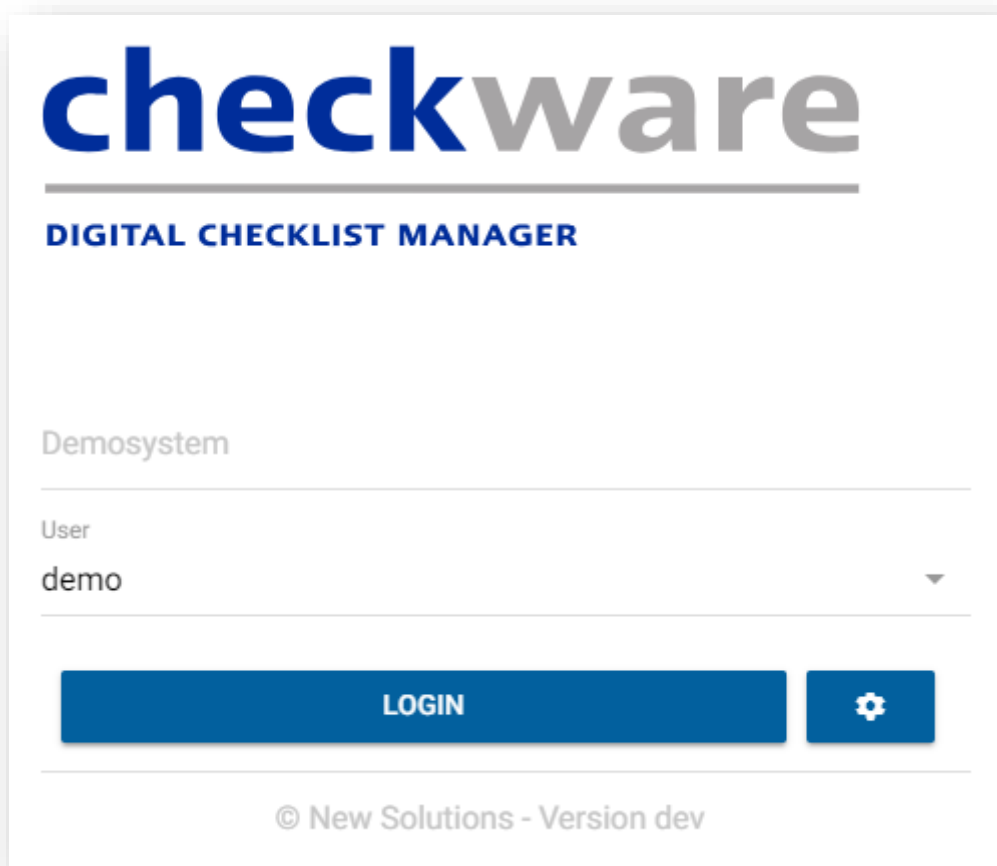
## 2. Login

### 2.1 Initial Login

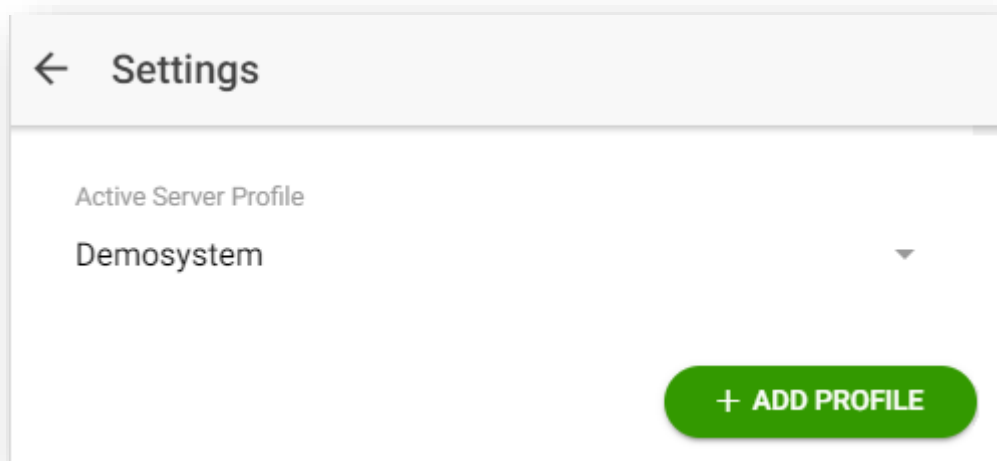
After the application has been started, a login-window will appear. Some settings will require your attention before you first sign-in, however. In order to get started, tap the cogwheel- icon in the lower right corner.

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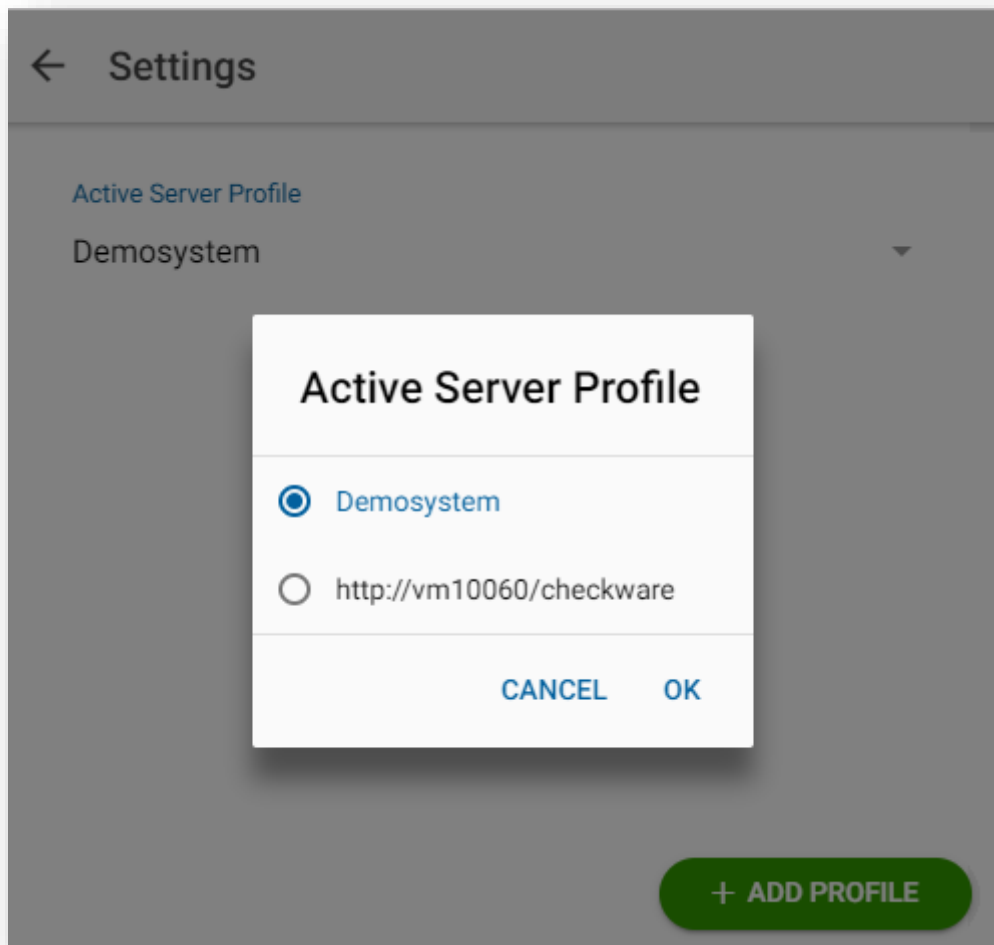
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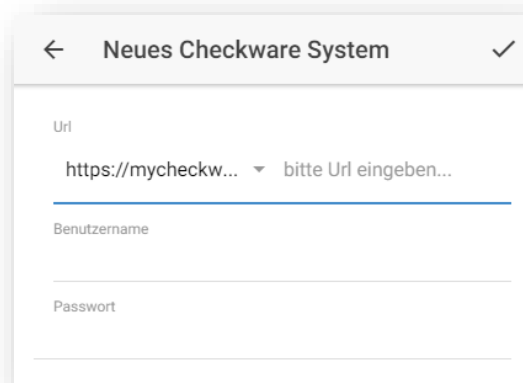
A window displaying the current Server-profile will open.



Tapping your current server-profile will allow you to switch to different profiles.



In order to create a new profile, return to the overview and tap the green label saying *ADD PROFILE* in the lower right corner. The following screen will appear, allowing you to create a new server-profile:



Enter the address of your Checkware Online- System into the field labeled *URL*. You can speed up the process by choosing the URL-prefix (*https://*, *http://*, *https://mycheckware.com/*) in the dropdown-menu.

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← New Checkware System

Url  
http://      ▼ www.example.com

Username  
johnsmith

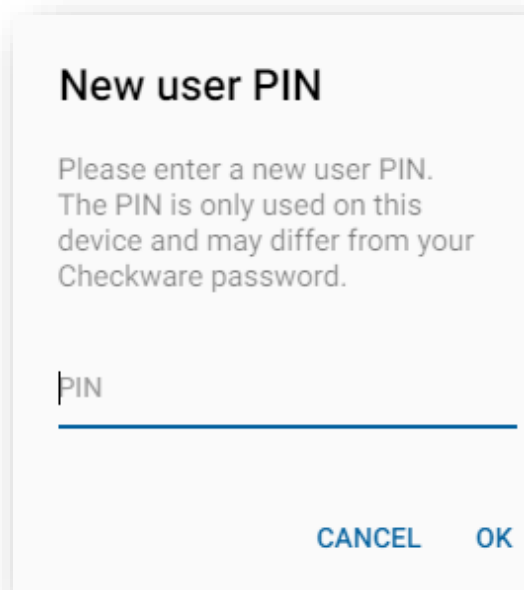
Password  
\*\*\*\*\*

✓ SAVE

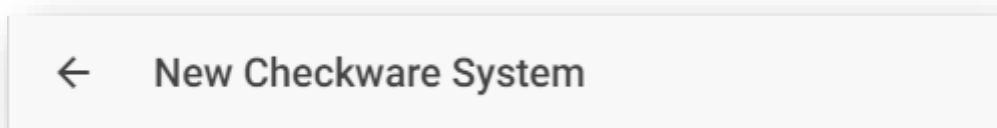
✕ CANCEL


Tap *OK* and enter the second part of your address. Suppose that your Checkware Online-System is hosted on `http://www.example.com`, choose “`http://`” in the dropdown-menu and subsequently enter “`www.example.com`” in the adjoining field. Finally enter your credentials and tap the checkmark-icon in the top right corner to confirm your input.

You will be asked to enter a PIN, which will let you log into your Checkware-App very conveniently without the need to enter your server-password on each login.




After entering your PIN, you will return to the profile-overview. Tap the arrow on the top left corner to return to the login-screen. After you log in, Checkware will synchronize your data for the first time.



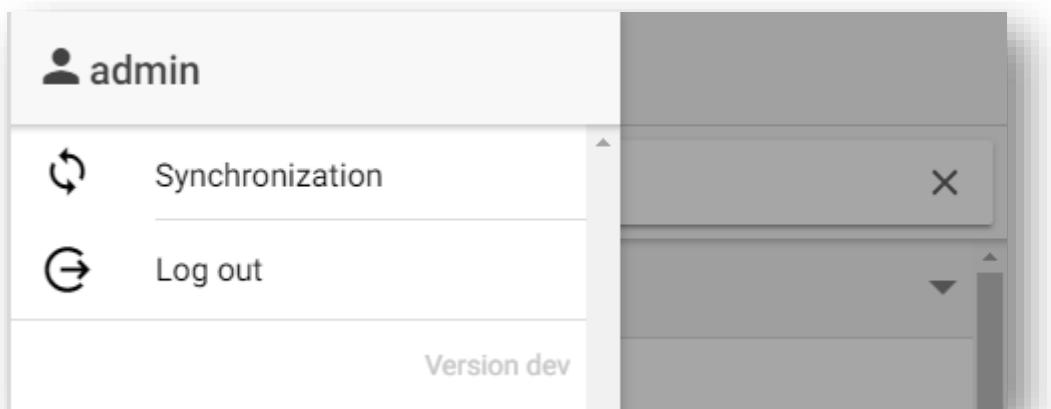
You can log off the Checkware-App by tapping  in the top left corner of the screen and choosing *Log out*.

## 2.2 Status of the synchronization process

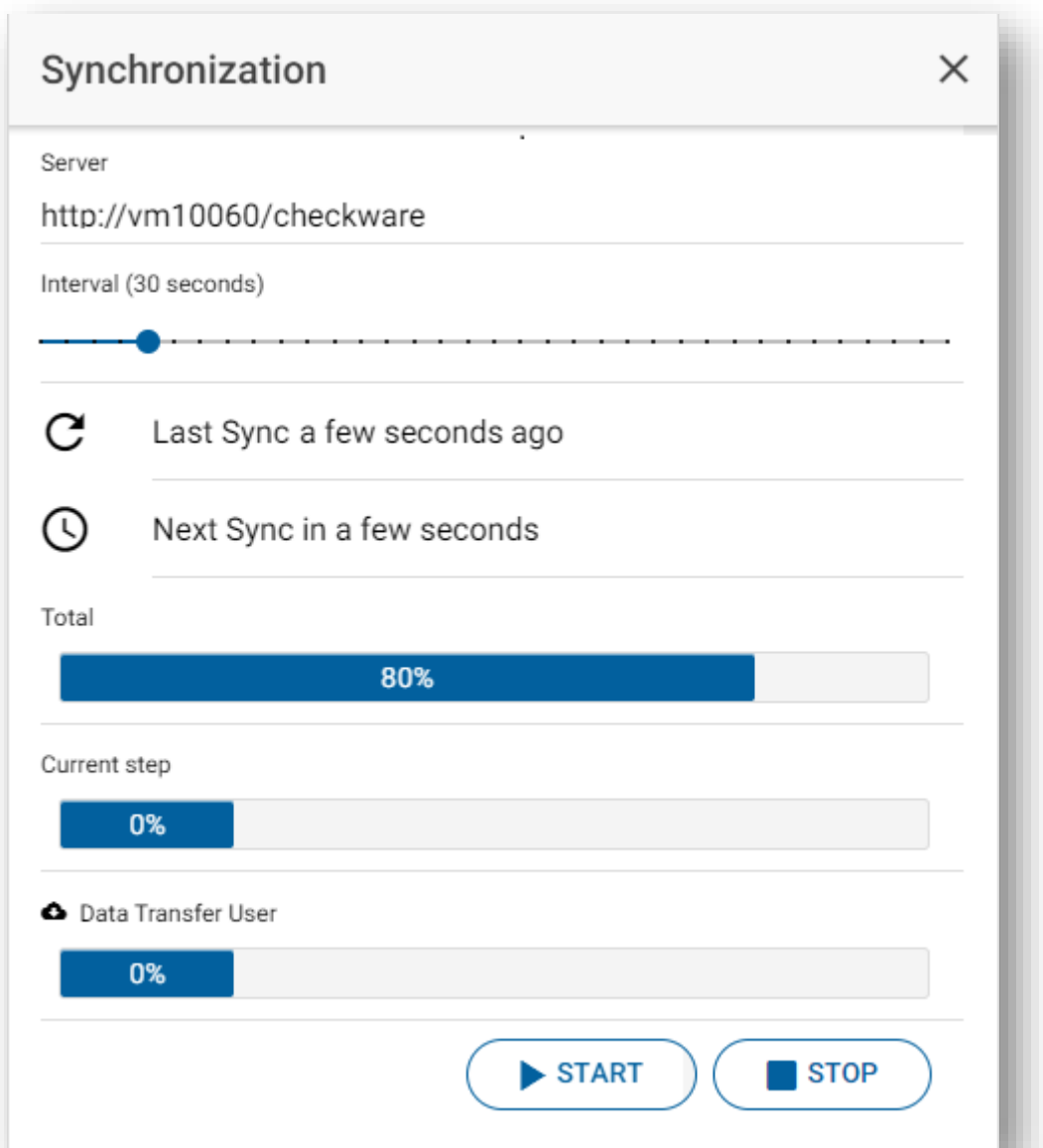
Tap  in the top-left corner and choose *Synchronization* if you want to monitor the status of the synchronization process or if you want to view additional settings.

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The following screen will appear providing an overview over the synchronization process.



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The bar in the top section of the screen allows you to manipulate the frequency of the automated synchronization process. You can choose intervals between 10 and 180 seconds. On this screen you can also verify the status of the latest synchronization and the moment the next synchronization is scheduled. The status of the latest synchronization is indicated by the following symbols.



Synchronization completed successfully



Synchronization is being executed at the moment



Automated synchronization was halted by the user. Tap *START* in the synchronization-screen to reactivate it



An error has occurred during synchronization



No server-connection detected or a server-related error has occurred.

You can work without any restrictions, even if no server connection is available. All changes will be transferred to the server automatically as soon as the connection has been reestablished. You can also prevent Checkware-App from synchronizing automatically by tapping *STOP*, if you wish to do so. The process will stay on halt until you either tap *START* or log off the app and log back in again. By tapping *START* you can manually trigger the synchronization process if need be.

## 3. Fill in checklists

After you logged in, provided Checkware-App has completed the synchronization process, you will find yourself on the tab *My checklists*. You can identify your current tab by looking at the symbol at the bottom section of the screen. The building-icon indicates the *My checklists* tab. The pen-icon indicates the *Incomplete checklists* tab and the checkmark-icon indicates the *Tasks* tab.



My checklists



Incomplete checklists



Tasks

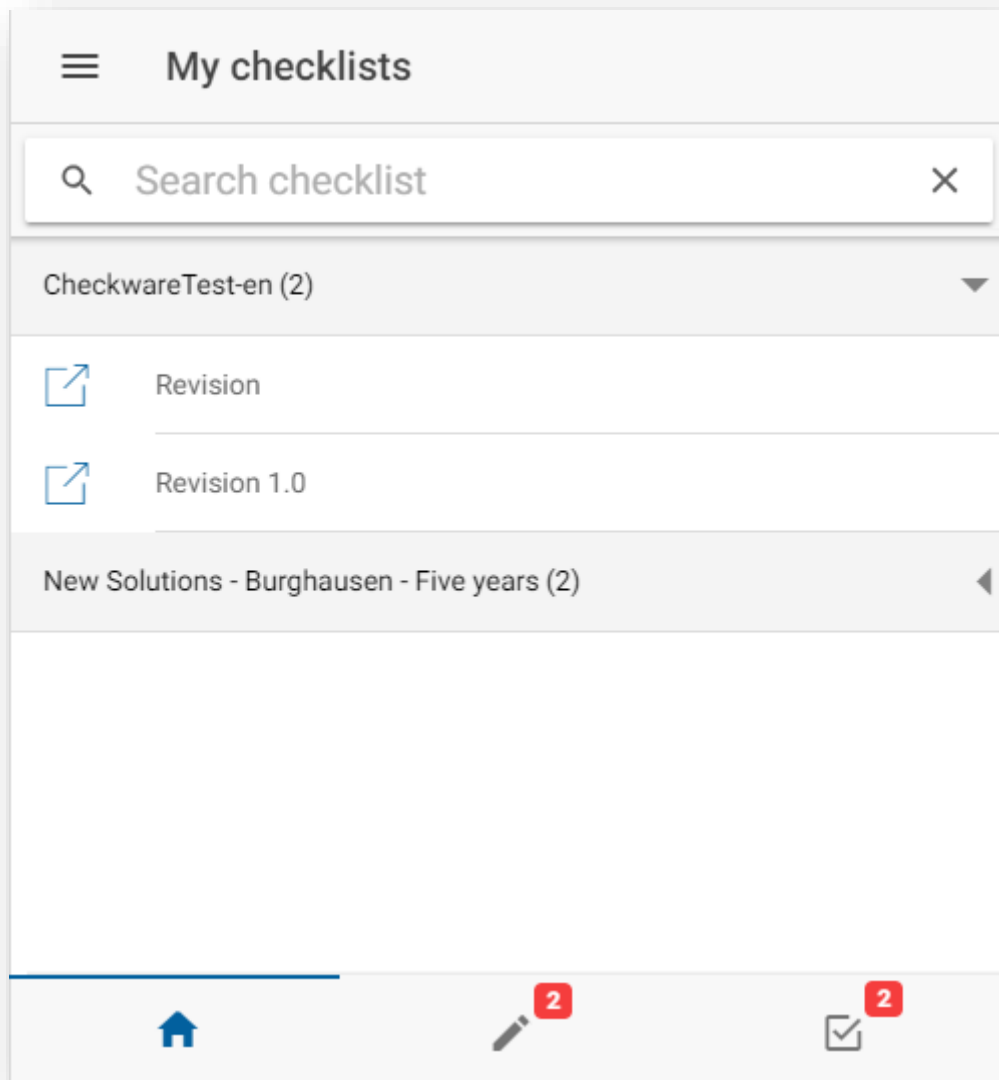
### 3.1 *My checklists*

The *My checklists* -tab contains available checklist-templates. They are subdivided into the categories that have been created in the Checkware Online- system. You can expand or collapse these categories by simply tapping them, thus making navigation much more

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convenient. Please note, that in the picture below the second column is collapsed whereas the first column is expanded




You can also search for a specific checklist by entering its name into the search-field located on the top of the screen as seen in the image above. Your checklists will be filtered dynamically while you enter a term, displaying the number of checklists that fit your search.

Tap a checklist in order to open and edit it. When you are done, you can complete the checklist by tapping the signature-field at the bottom. You can sign the checklist directly on your screen with your finger or a tablet-pen.



The image shows a 'Signature' dialog box with a light gray header. Below the header, there are two input fields: 'Name' and 'Date'. The 'Date' field is pre-filled with '27.06.2018'. Below these fields is a large, empty rectangular box for a signature. At the bottom of the dialog, there are three buttons: 'OK' with a checkmark icon, 'RESET' with a circular arrow icon, and 'CANCEL' with an 'X' icon.

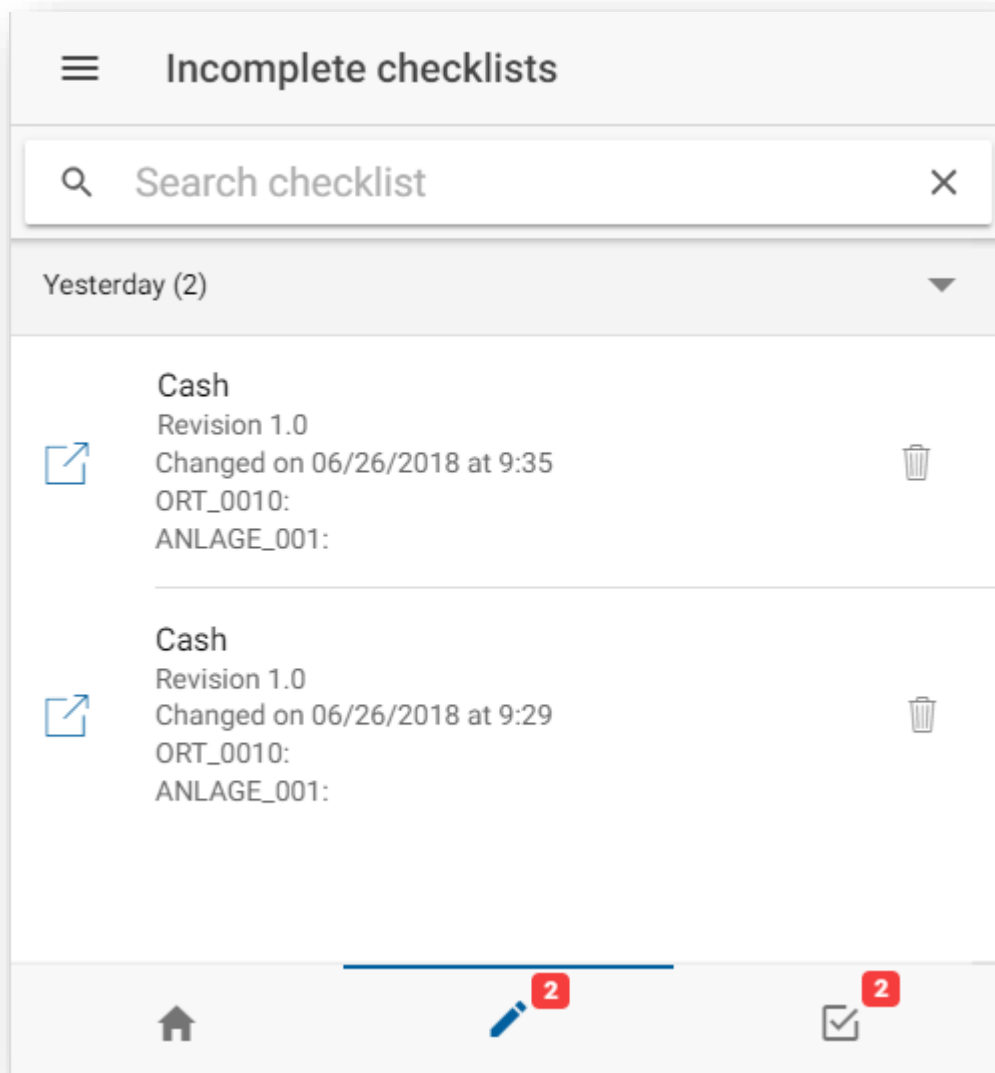
By tapping *OK*, your signature will be accepted, thus completing the checklist. Tapping *CANCEL* will cancel the process if you want to return and reevaluate your input. If you want to reset the signature-field you can do so by tapping *RESET*.

If you want to close the checklist, tap  in the top left corner. If there are any changes that have not been saved yet, the title will be colored red. Attempting to close an unfinished checklist will display a warning that will let you either save the current state of your checklist or discard all changes made.

If you chose to save the current state of your checklist, it will appear on the tab *Incomplete checklists* (see below). You can save your checklist by tapping the triple-dot icon in the top right corner and choosing *SAVE CHECKLIST*. By choosing *SAVE TEMPLATE*, you can save an uncompleted checklist as a pattern for later use. This will allow you to reuse its current state for repetitive tasks that only require a part of a checklist to be filled in. By way of example, if you had fill in a checklist for a specific plant repeatedly, you may not want to type in the address multiple times. The fields you want to use as a pattern, however, have to have this feature enabled on the Checkware Online- System.

## 3.2 Incomplete checklists

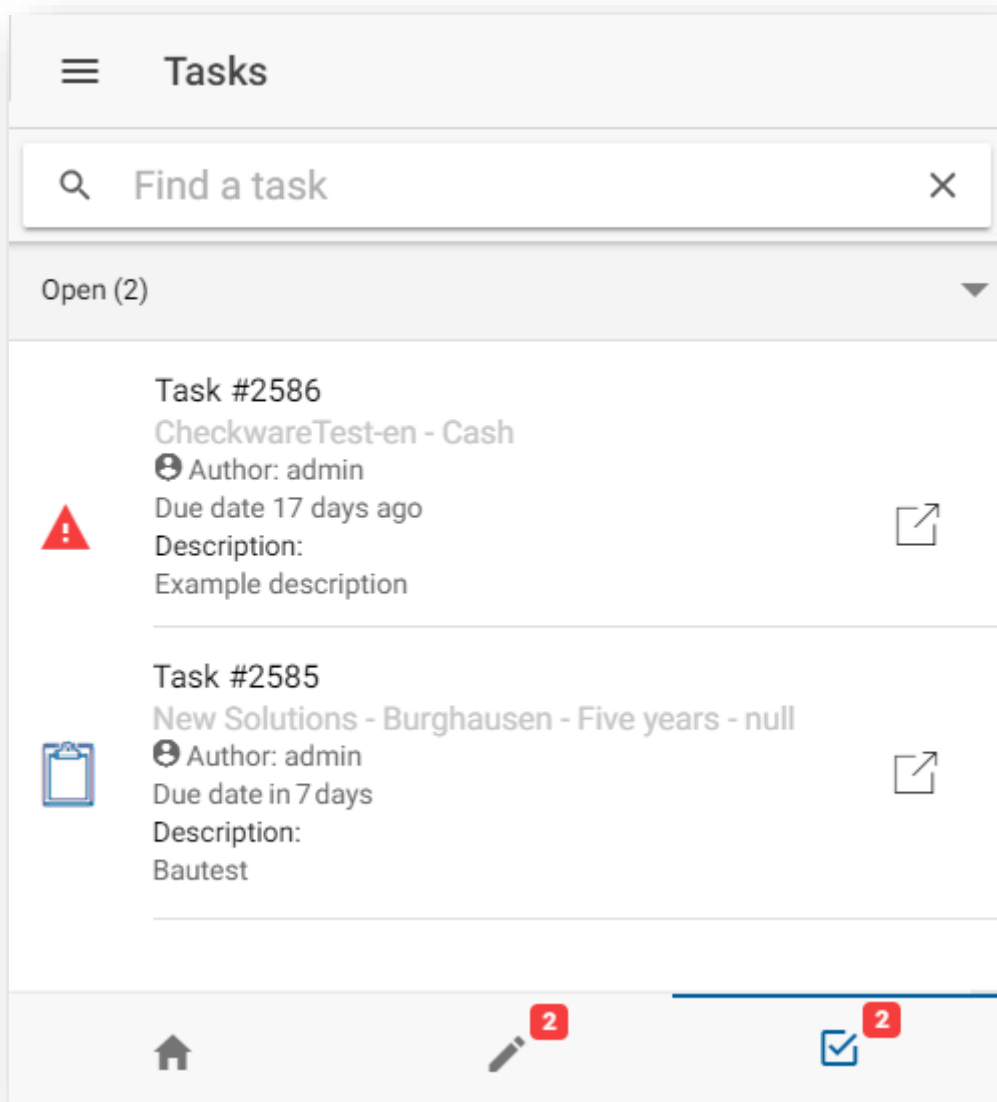
The tab *Incomplete checklists* contains all checklists that you have filled in partially and which you have yet to complete. These checklists will not be sorted according to their respective category, but rather according to their date and time. This way it is very simple to finish the work of a specific day.



Tap and open a specific checklist if you want to continue working on it. If you decide to remove a specific checklist from the list, simply do so by tapping the bin-icon on the right-hand side.

## 3. Tasks

This tab contains tasks that have been created in the Checkware Online- System and have been assigned to you (and potentially other persons, as well). Tasks assigned to you have to be filled in by either you or further persons associated with it, in order for them to be completed.



## 4.1 Open Tasks (Open)

*Open Tasks* are tasks that have yet to be completed but are not overdue yet. They are indicated by a blue clipboard-icon as can be seen in the second task in the image above.

## 4.2 Overdue Tasks


*Overdue Tasks* transgressed their due date. They will be put on top of the list automatically and are indicated by a warning triangle-icon as can be seen in the first task in the image above.

## 4.3 Edit Tasks

Tap on a task in order to edit it. The checklist connected to this specific task will open. As soon as you have edited and completed the checklist, its related task will be marked as *Done*, moving it from the *Open* to the *Done*- section. If no checklist has been assigned to a given task, tapping it will have no effect. Such tasks serve the purpose of a mere reminder and can

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be distinguished from other tasks by checking whether the -icon is missing. They can be edited on the Checkware Online- System.

## 4.4 Completed Tasks (Done)

Completed tasks will appear on the *Done* section in the *Tasks* tab. They provide no icon or indication as they are not connected to any checklists after completion. Expand the *done* section in order to display checklists that have been completed.

