UNIFOCUS WORKFORCE MANAGEMENT

How To Guide:

Service, Glitch, Mobile, Housekeeping, Inspection

Document version 3.6

KNOWSERVICE

KNOWGLITCH

KNOWMOBILE

KNOWHOUSEKEEPING

KNOWINSPECTION

Contents

System requirements and administrator information

As an Operations Suite system administrator, you have full access to the configuration and management of the software. This document is not intended as a setup guide for new systems, but as a guide to help you with the most common setup tasks after the software has been configured by a consultant.

If you are not sure about a certain task, contact your IT department, Support (via support@knowcross.com), or your account manager.

To begin configuration, you must have Microsoft Silverlight installed. The URL can only be reached using Safari, Internet Explorer 11, or Edge with Internet Explorer mode enabled. Contact IT if you do not have this installed. Not all functionality or modules discussed in this document may be accessible to you, as some may be license- or PMS-dependent. See your IT department for more information.

The URLs you may need are:

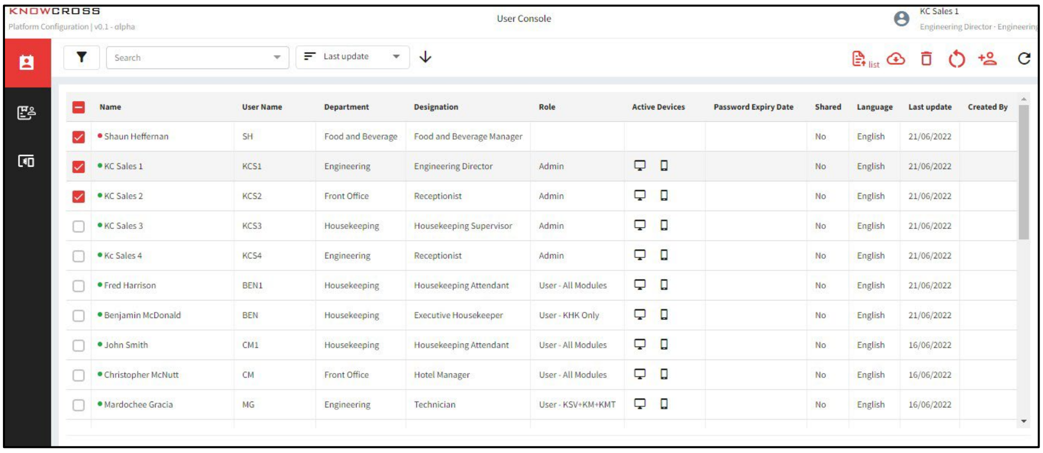
- www.tritonsuite.com
- www.tritononline.com
- hk.knowcross.com
- ins.knowcross.com

General configuration

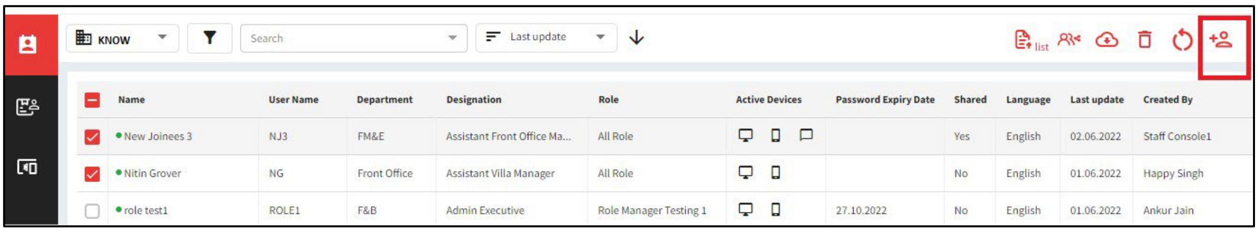
Creating a new staff member

1. From the home screen ( ), select **System Configuration**.

   The home screen of the User Management console appears.



2. Select the **create new user** icon in the upper-right corner of the screen.

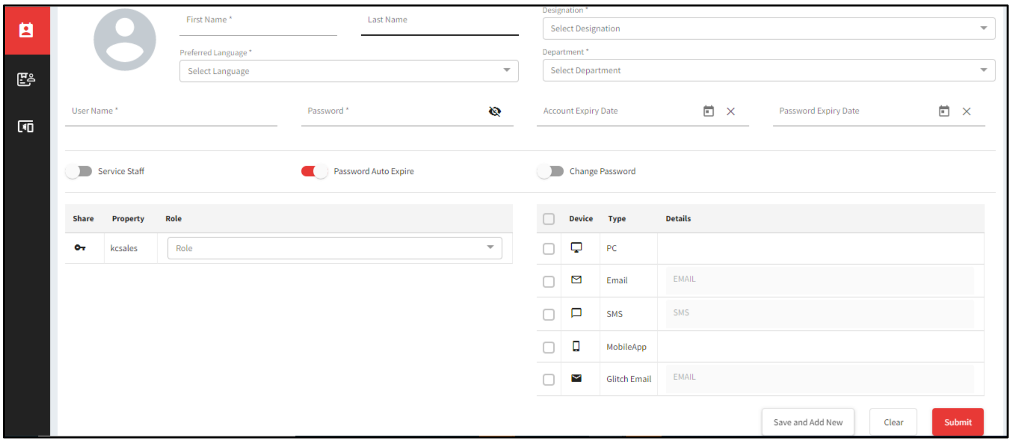


   A window appears.

3. Complete the information for your new user.
   - First Name
   - Last Name

- Language
- Username
- Password
- Service staff—Select this option if the staff will receive jobs.
- Designation
- Department
- Devices
- Role

4. When you are finished, select **Submit**.



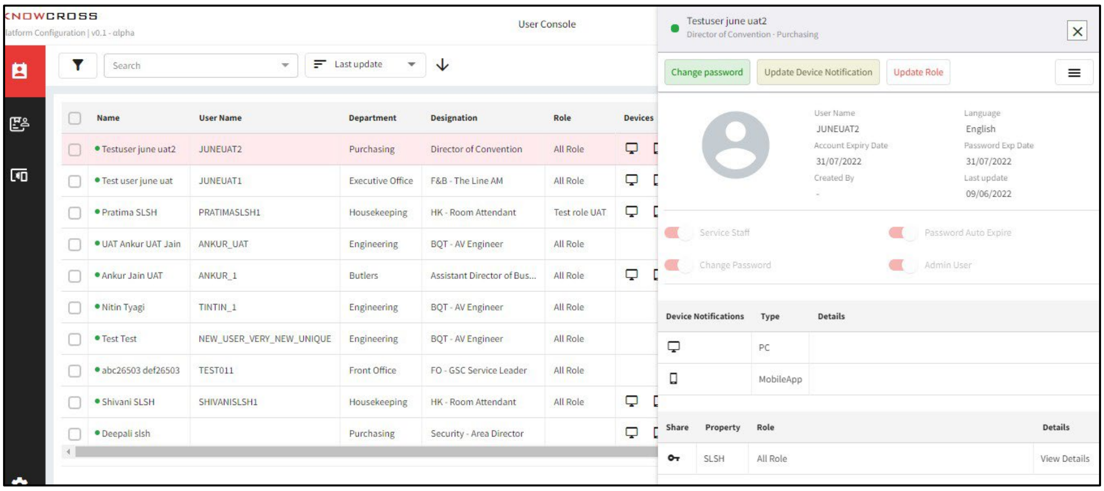
Editing/updating staff

1. From the home screen ( ), select **System Configuration**.

   The home screen of the User Management console appears.

2. Select the row of the staff that you want to update.

   A pane opens.



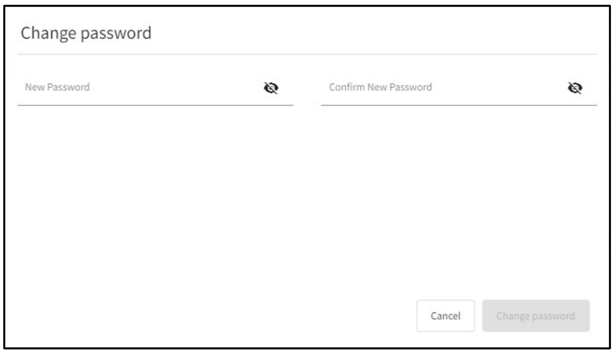
On this pane, you can do the following:

- Change the password.
- Update the role.
- Update device notification.
- Edit names/language/designation/department.

Complete the following steps, as necessary:

- Select **Change password**.

  In the Change password dialog box, you can update the password of your staff. You create a new one and confirm the password to be able to submit the change.

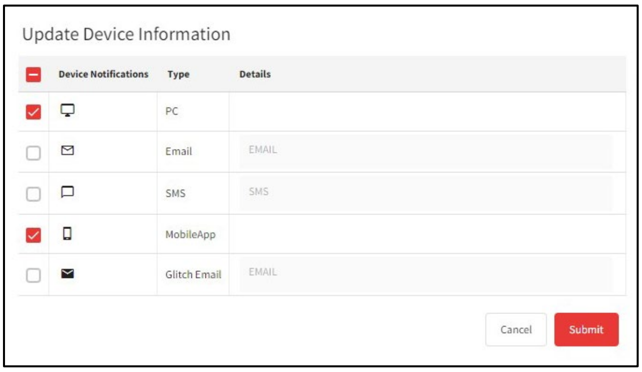


- Select **Update Role**.

  In the Update Role dialog box, you can update the role of the staff. From the drop-down list, select a new role. Select **Submit**.

- Select Update Device Notification.

  In the Update Device Information dialog box, you can add or remove the devices that must be changed for the staff. When you are finished with your updates, select **Submit**.

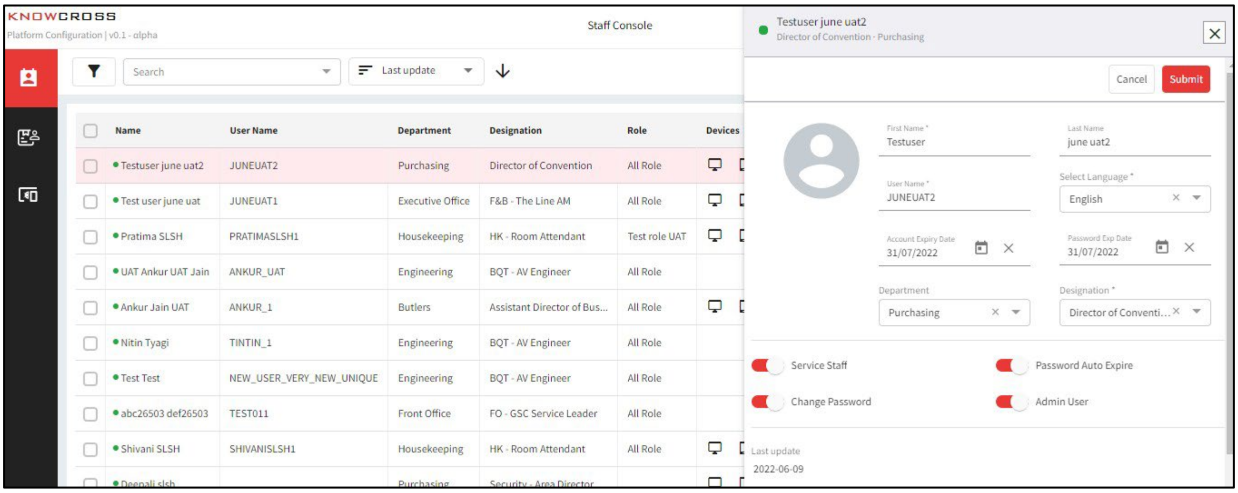


3. From the upper-right corner of the screen, select the **Edit** icon.

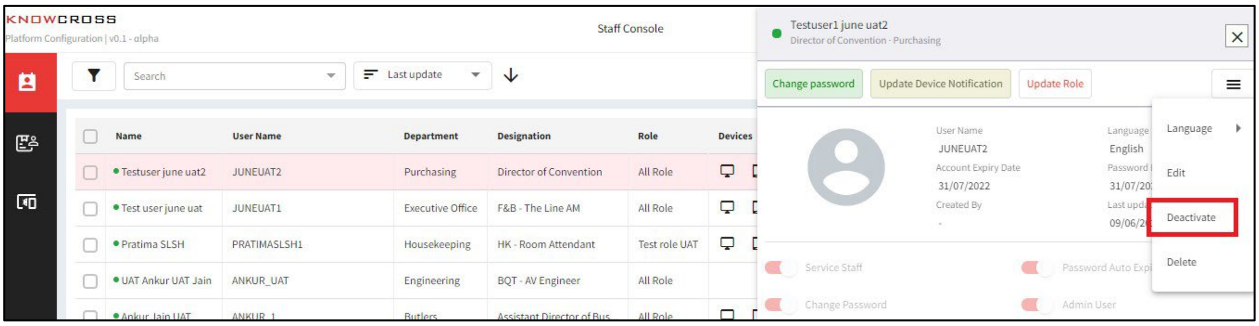
   A menu appears. Options include:

   - Language
   - Edit
   - Deactivate

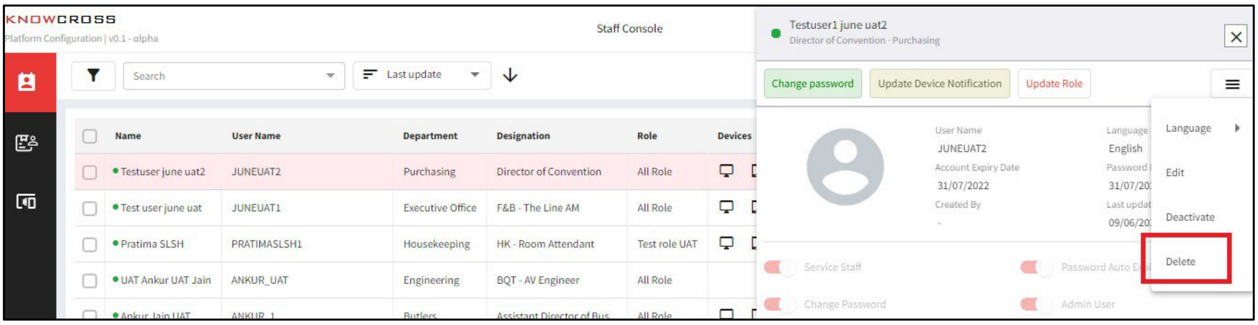
- Delete



4. If necessary, select **Language** to update language for the staff.
5. If necessary, select Edit to update the following information:
   - First name
   - Last name
   - Designation
   - Department
   - Service staff status (if the staff receives jobs)
   - Change password (provides the option for the staff to change their password)
   - Auto Password
   - Admin User (authorizes the staff to access all features of the software)
6. If necessary, select **Deactivate** to deactivate staff. Deactivated staff cannot access the software.



7. If necessary, select **Delete** to delete staff from your database.



Creating new roles

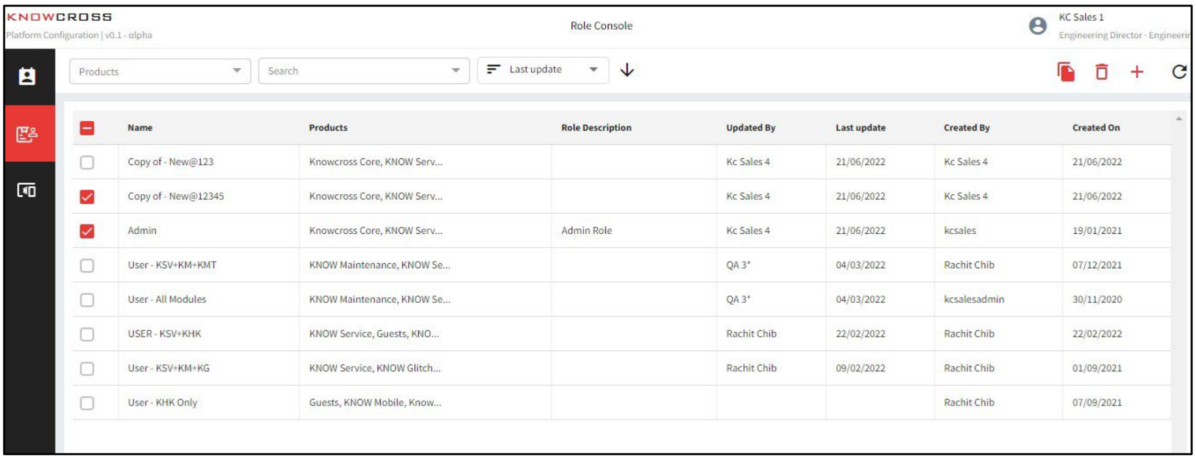
Access to the various functions within Service, Glitch, Maintenance, or Mobile are controlled from User Roles. All staff members should have a role assigned to allow access to the platform. If you change a role, this will apply to all staff members on the next login.

1. From the home screen ( ), select **System Configuration**.

   The home screen of the User Management console appears.

2. Select middle icon in the left-hand menu.

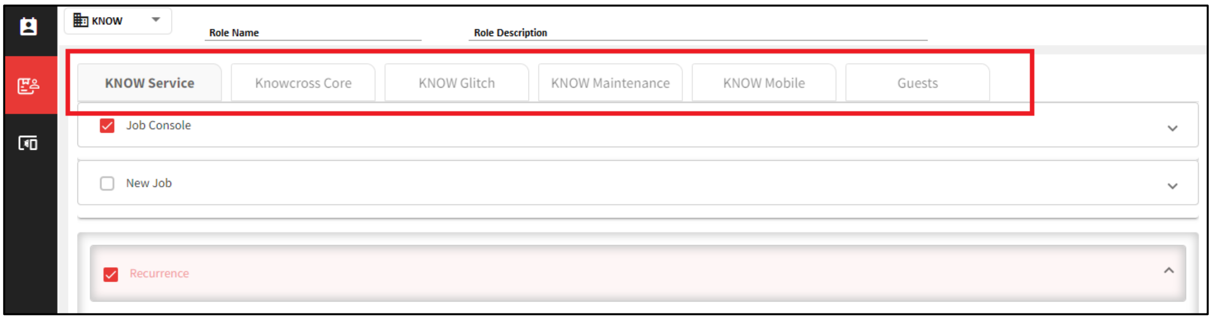
   The screen displays all the roles that are currently available in your system.



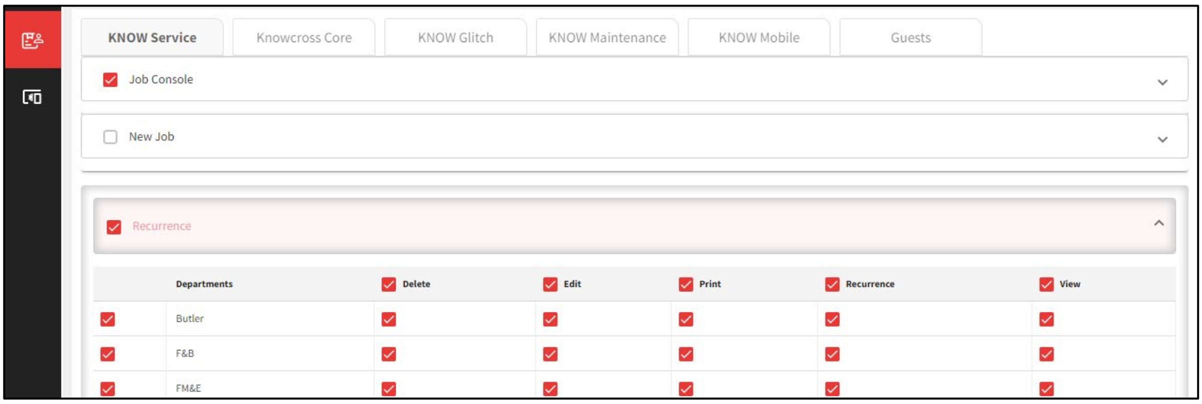
3. To create a new role, select the plus (**+)** button.

   A new screen appears.

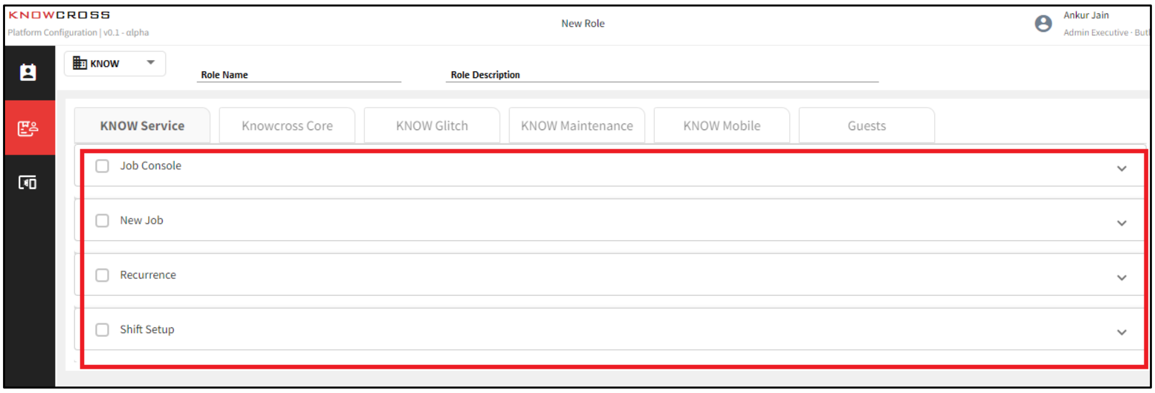
4. Create the name of this new role and select which rights this new role will have.



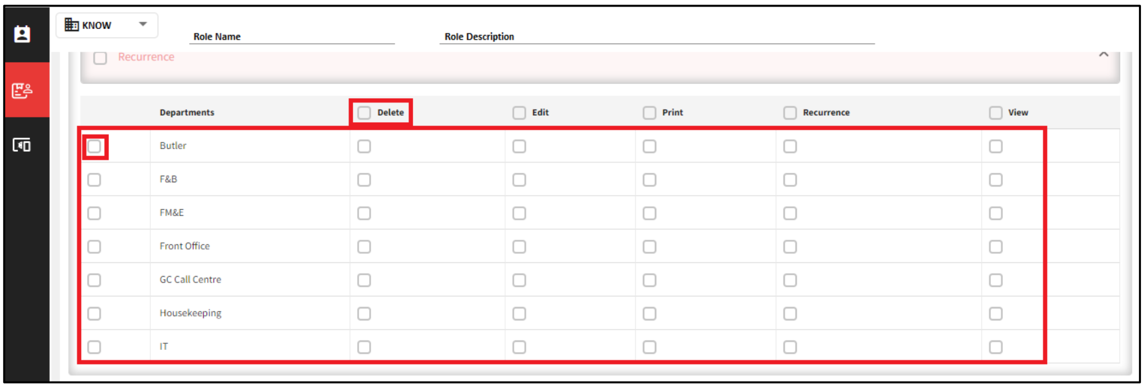
5. Choose which products, modules, and rights the role will have.



Below the section, you can see which software products the role can access.



6. After you have selected the product, search for the module.
7. Once you have selected the modules, select the rights for the role.



When you have finished creating your role, select **Save**.

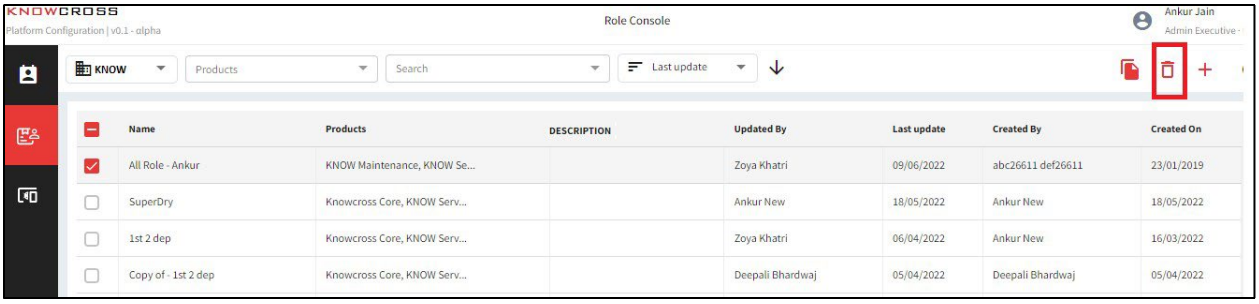
Managing roles in the Role Console

You can manage existing roles in the Role Console. Tasks include:

- Deleting a role
- Copying a role

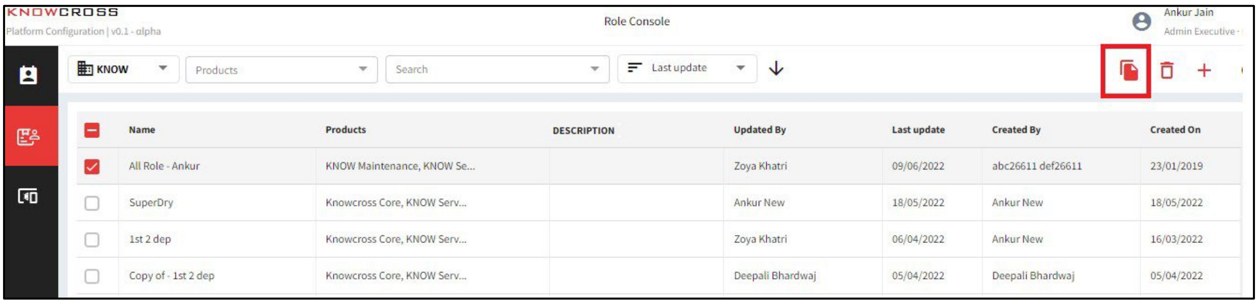
Deleting a role

Deleting a role permanently removes it from the system. To delete a role, select the trash icon in the upper-right corner of the screen.



Copying a role

Copying a role creates a duplicate of the role. You might copy an existing role if you must create a new role that differs only slightly from the original. This process saves you some time when creating new roles. To copy a role, select the Copy icon in the upper-right corner of the screen.



Authorizing, creating, and editing a mobile device

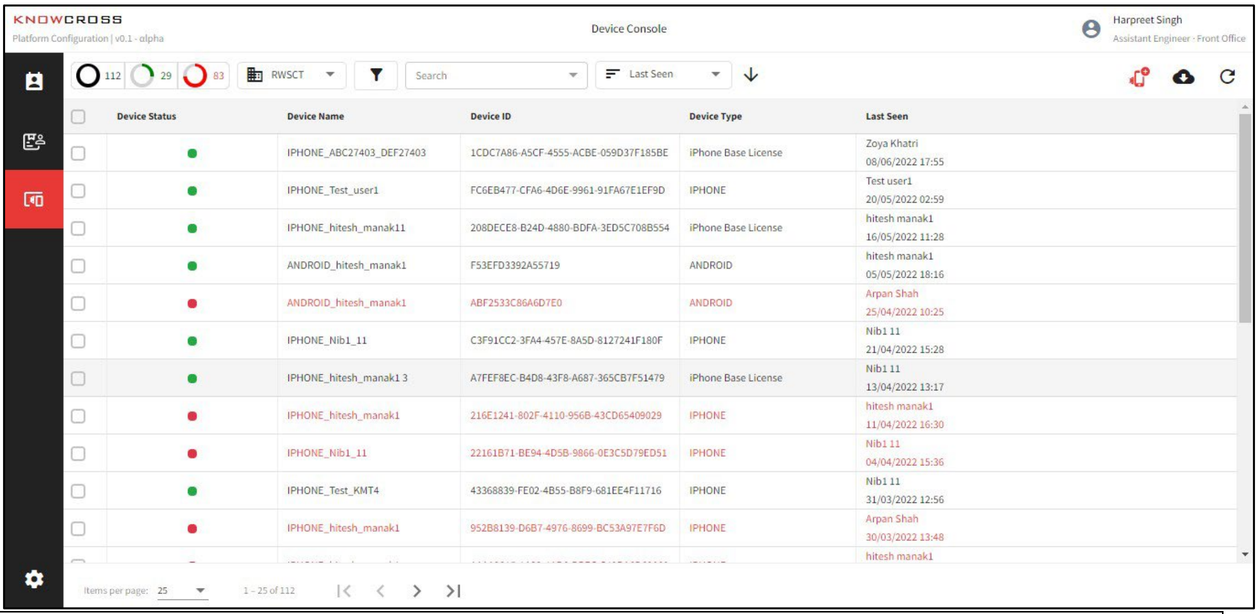
Administrators can manage and authorize smartphones and mobile devices across the mobile application.

Activating a new device

1. From the home screen ( ), select **System Configuration**.

   The home screen of the User Management console appears.

2. Select the third icon from the menu on the left. The screen displays all devices in your system.



> **Note:** Observe the number and device IDs of inactive devices before logging in to the software with the new device.

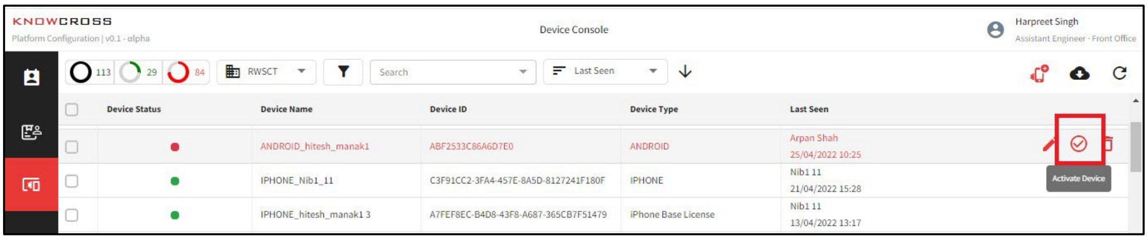
3. The device ID appears on the mobile client setup page once the mobile device has successfully connected to the software. (The mobile device user receives a message that their device must be authorized.)

4. Activate the correct device on the devices console.

   Your device appears at the top of the list in red text color.

> **Note:** You must verify the Device ID before the device can be activated.

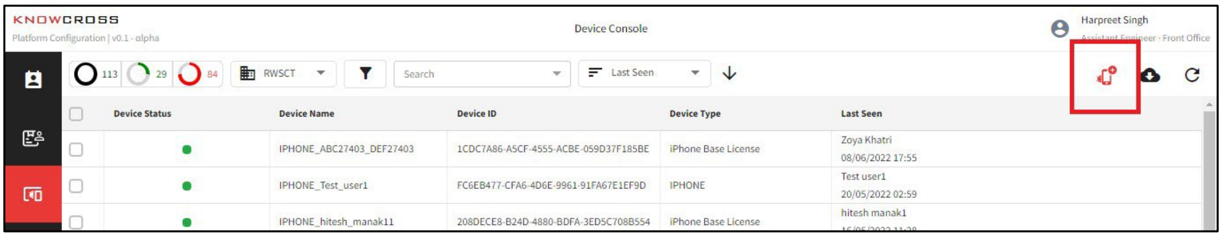
   To activate the device, select the **Activate Device** button in the row of the device.



   The text color of the row turns green to indicate that the status of this device is activated.

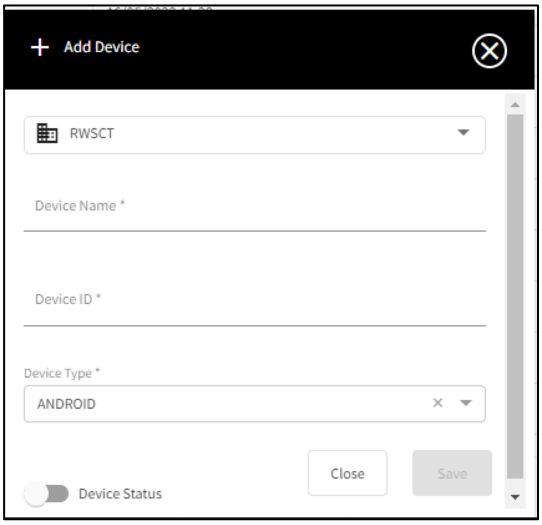
Creating a new device

1. On the device console, select the **New Device** button.



A screen appears.

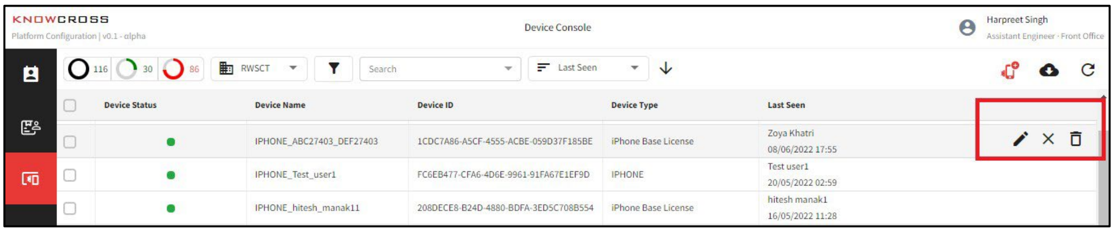
2. Complete the following information:
    - Device name
    - Device ID (ID provided with the software)
    - Device type
    - Device status (active or not active)
3. After you have entered the information, select **Save**.



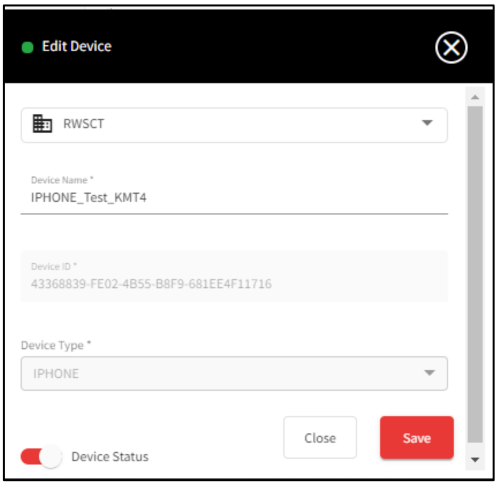
The device appears on the device console and is ready to be used.

Editing a device

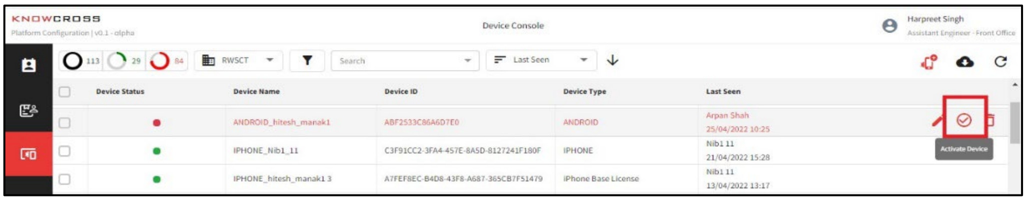
1. Select the row of the device that you want to edit.



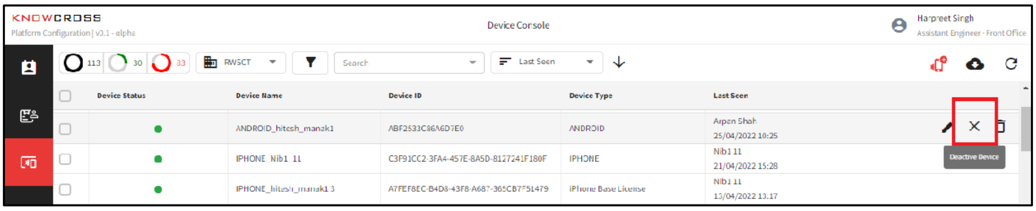
The Edit Device dialog box appears.



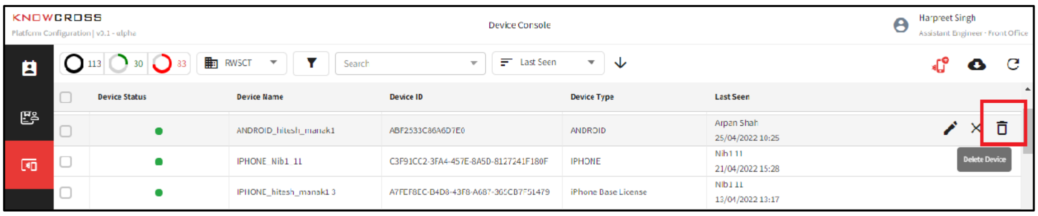
2. You can now perform the following tasks:
   - Change the name of the device.
   - Change the status of the device.
   - Activate the device. A green dot (●) indicates that the status is activated. A red dot (●) indicates that the status is deactivated.



   - Deactivate the device.



   - Delete the device.

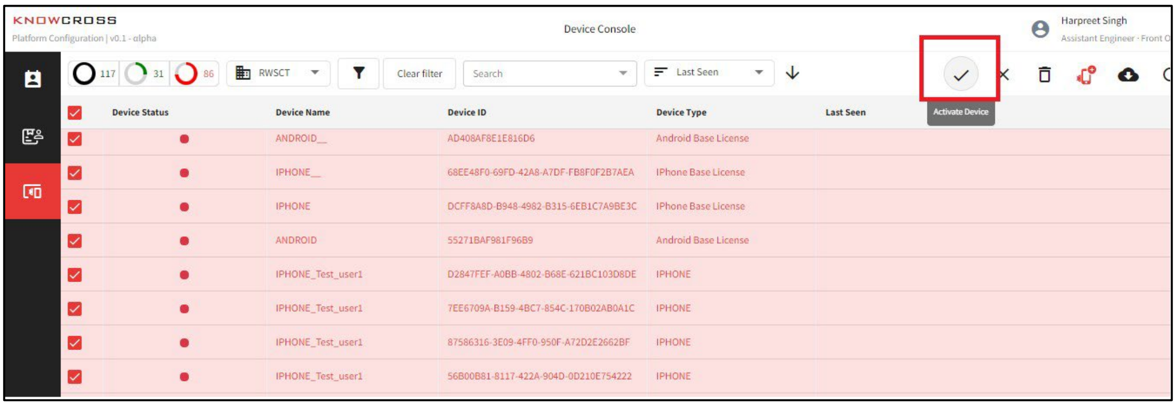


Other features in Device Console

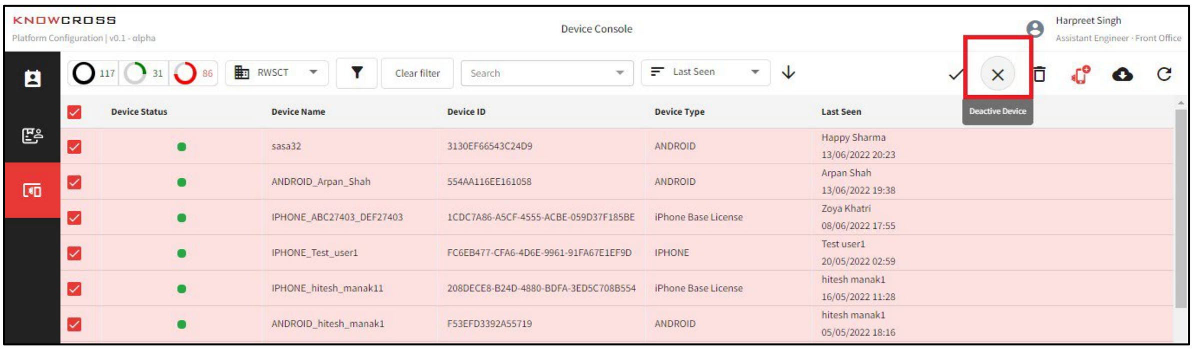
From the Device Console, you can activate, deactivate, and delete multiple devices.

Select multiple devices and complete the following tasks as necessary.

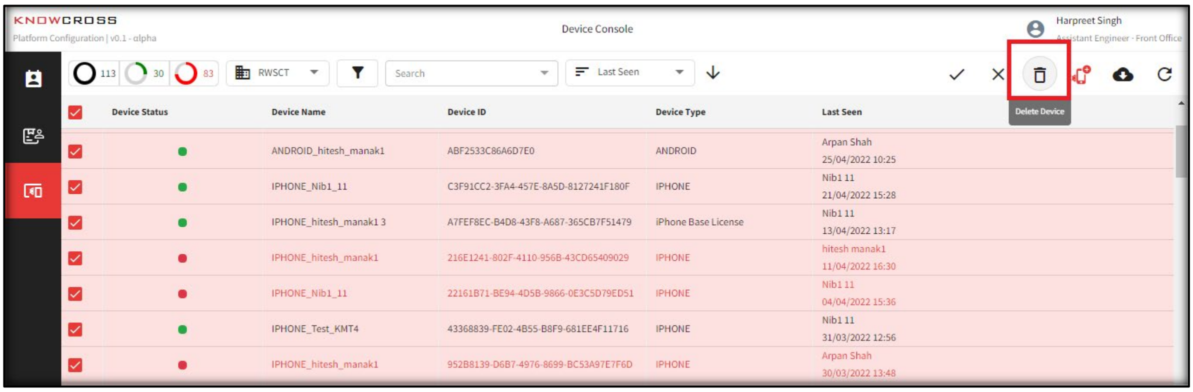
- Activate the devices.



- Deactivate the devices.



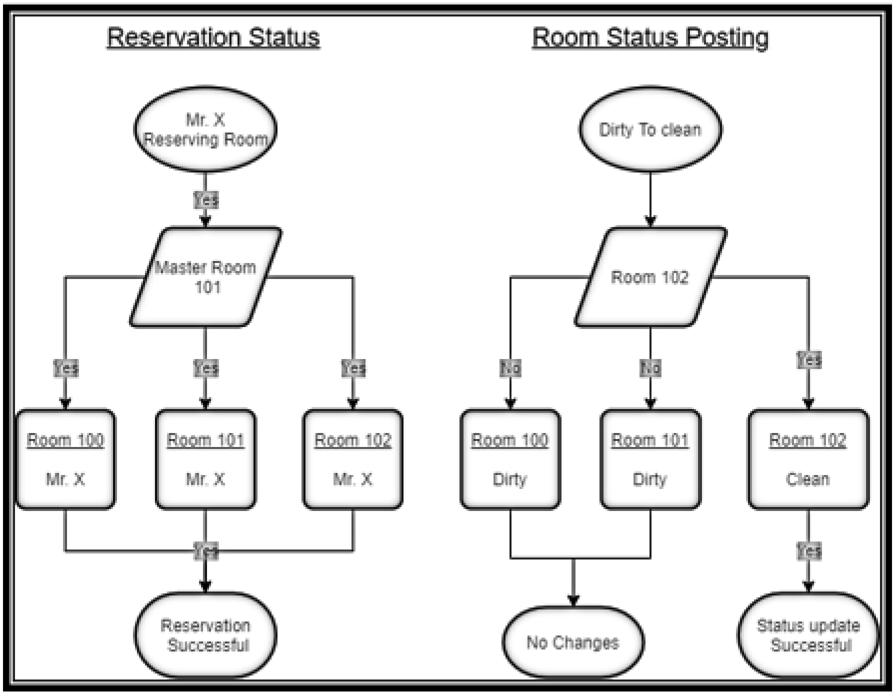
- Delete the devices.



Creating component rooms

Component rooms allow several rooms to be booked together by a guest and displayed as one entity for the hotel.

How it works:

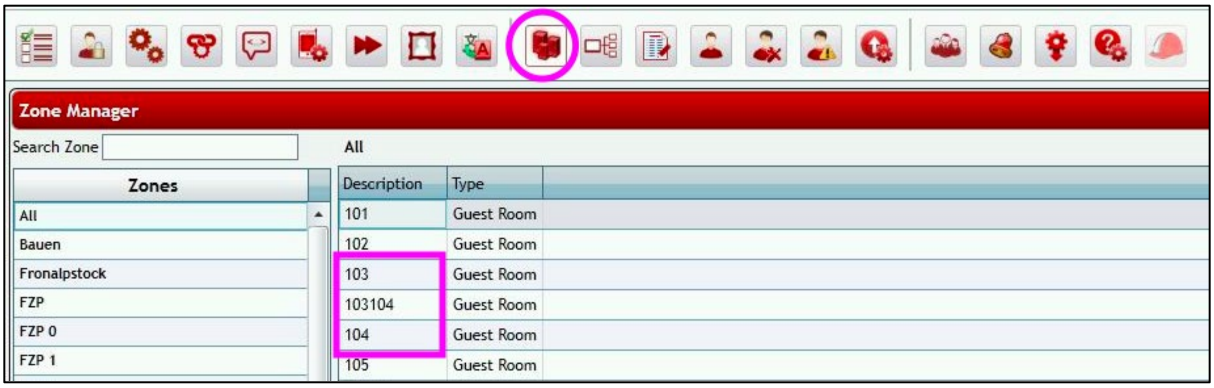


In this example, master room 101 is a component room. It is not a physical room but acts as a link between all the rooms that have physically been booked together in the PMS. If master room 101 is booked, rooms 100, 101, and 102 appear as occupied and have the same guest name as the one associated with the master room.

Room statuses follow a similar pattern unless one of the physical rooms involved is cleaned individually.

When onsite at a property, the activation team follows three steps to configure the component room feature:

1. Add the component rooms as a guest room in the locations.

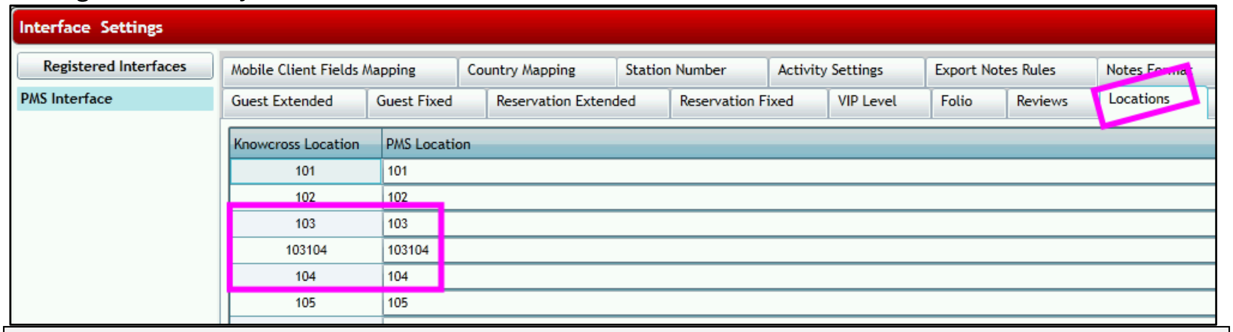


For the component room feature to work, the component rooms must be configured in the Zone Manager as a Guest Room. Licenses must be extended for this, but they are usually not charged to the client, as these rooms are only virtual.

In this example, 103 and 104 are individual physical rooms that can be booked together. The component room is 103104 and becomes the master room if 103 and 104 were booked together. This is also where the reservation appears.

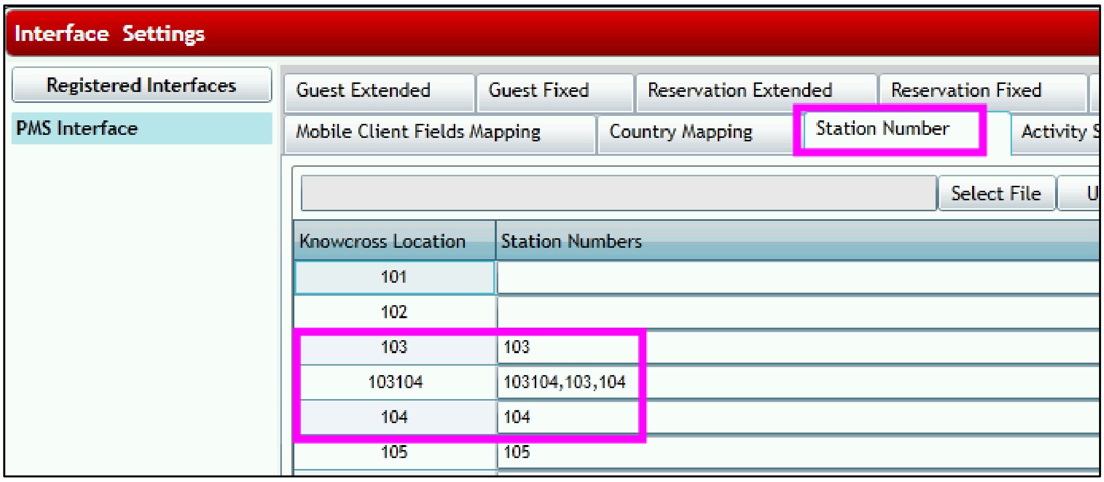
2. Configure the component rooms in the PMS interface **Location** tab.

   As with any other regular room, component rooms must be configured in the PMS Interface settings so that they are linked to the PMS.



> **Important:** The component room's PMS Location must appear exactly as it does in the PMS. The client can provide this information if necessary.

3. In the PMS Interface Station Number tab, link the component room to its related physical rooms.



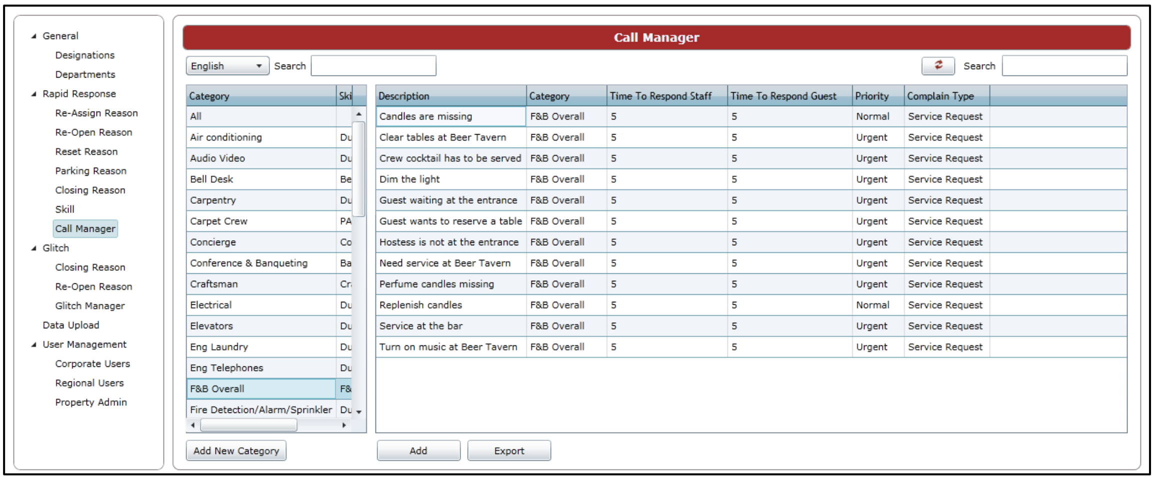
In **Station Number**, the physical rooms must be entered exactly as they appear in the PMS. The component rooms must have the following information: component room number, room1, room2, and so on. They must be separated by commas.

> **Note:** The system license controls how many guest rooms can be registered in the software. Component room functionality depends on your PMS and Interface. Contact your IT department for details.

Service and Glitch configuration

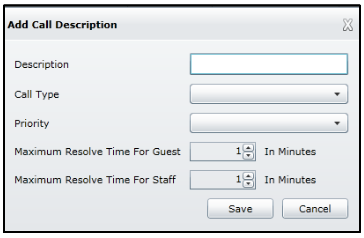
Adding a new call description

1. Log in to the Corporate Admin portal.



2. In the left pane, select the **Call Manager** link.
3. Select the relevant **Call Category** for which the **Call Description** is required.
4. Either select the **Add** button at the bottom of the screen or right-click the main screen and select **Add**.

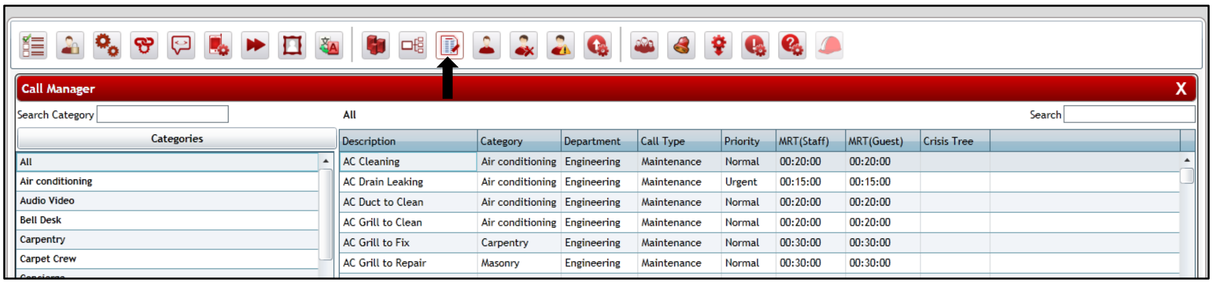
   A dialog box appears.



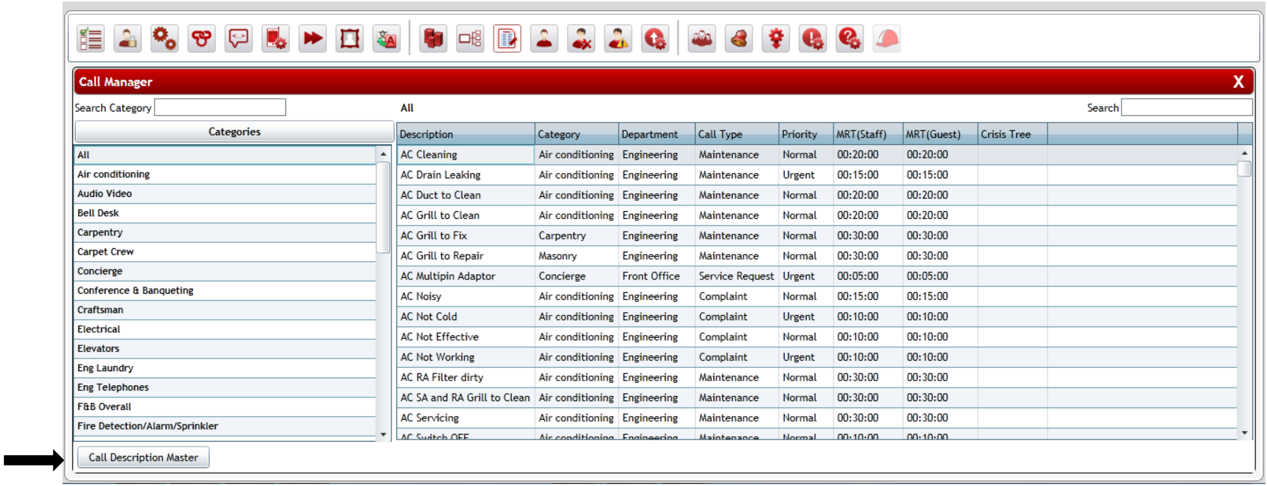
5. Update all the fields as necessary and select **Save**.

   The new call description appears in the list.

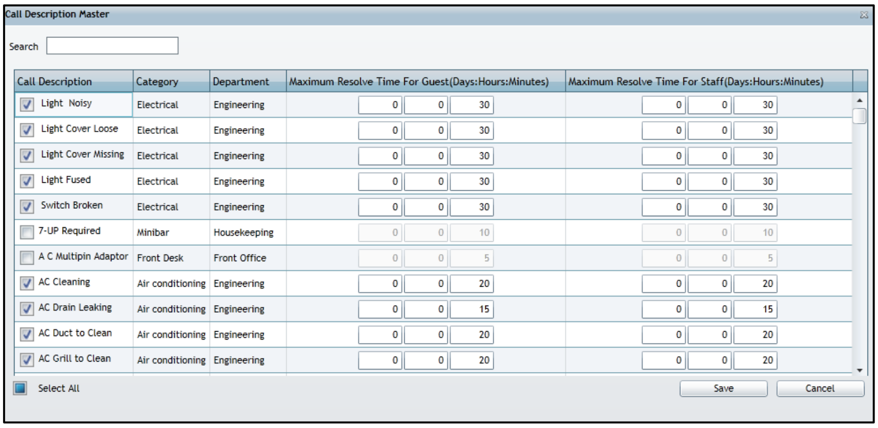
6. Log in to the Service portal using the administrator credentials and select **Configuration**.
7. Select **Call Manager** ().



8. Select **Call Description Master**.



The Call Description Master window appears. It displays all the call descriptions available in the Corporate Admin portal.



9. Select the checkbox next to the relevant **Call Description** and select **Save**.

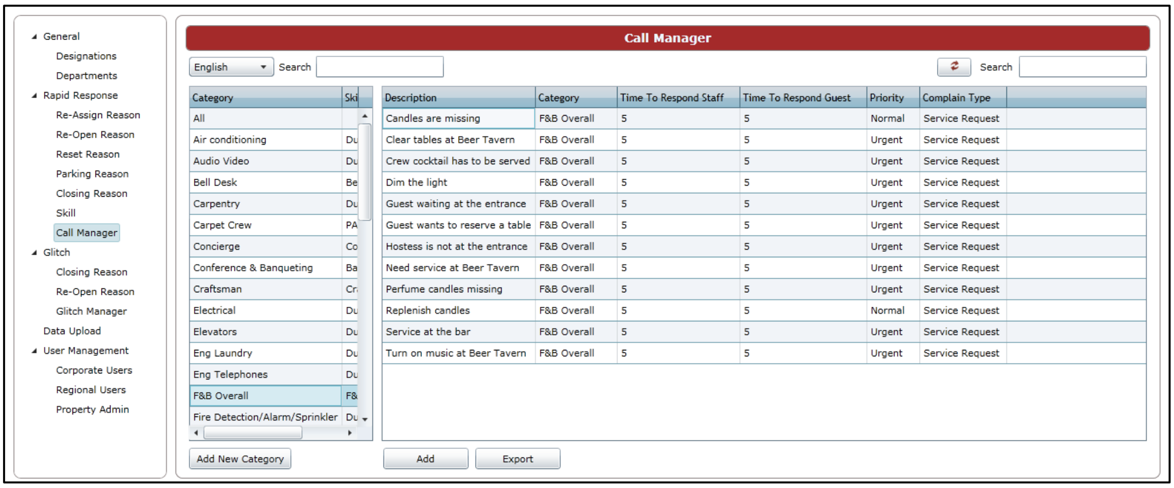
   The new Call Description has been added now.

Addition information on adding a new call description:

- In a multi-property setup:
  - If you create new jobs , they are available to all linked properties but must be activated by each property.
  - If you edit (rename) existing jobs/categories, all linked properties are immediately affected.
  - You can adjust the maximum resolution time (MRT) of calls from the Call Description Master window for each individual property.
- Query calls, which are a Call Type, automatically close upon registration and can be used for reporting purposes.

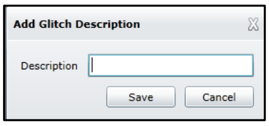
Adding a new Glitch description

1. Log in to the Corporate Admin portal.



2. In the left pane, select the **Glitch Manager** link.
3. Select the relevant **Glitch Category** for which the **Glitch Description** is required.
4. Either select the **Add** button at the bottom of the screen or right-click the main screen and select **Add**.

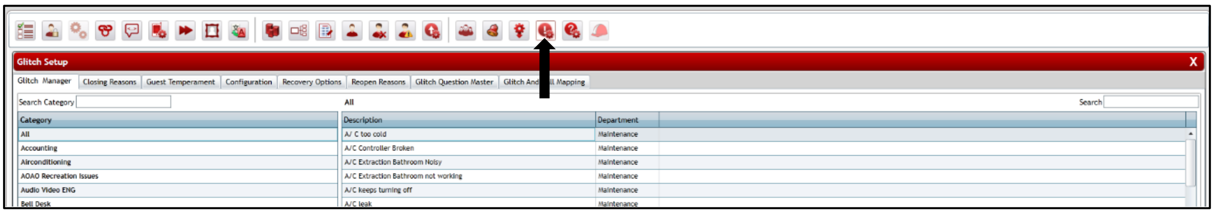
   The Add Glitch Description dialog box appears.



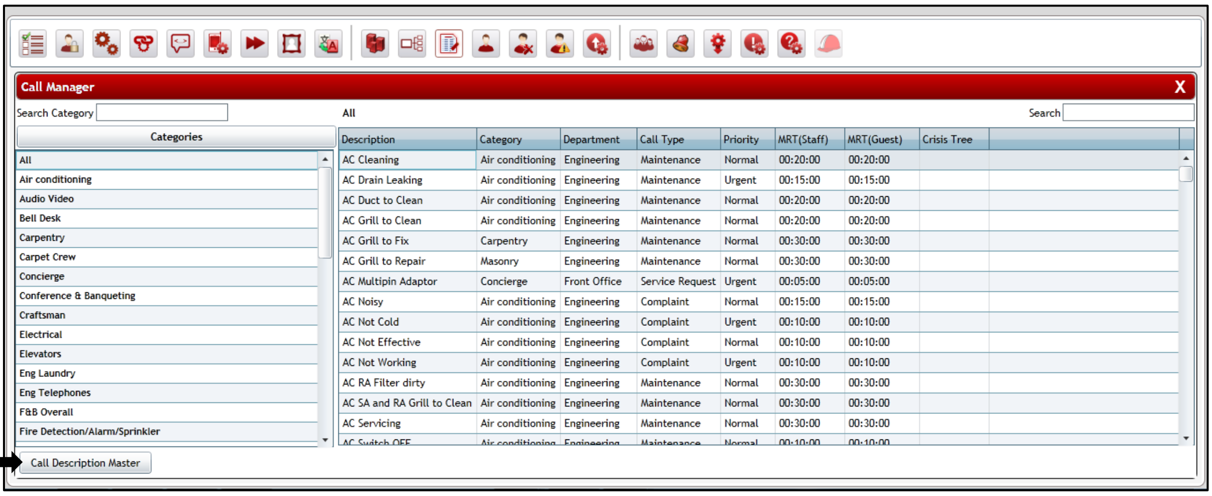
5. Update all the fields as necessary and select **Save.**

   The new glitch description appears in the list.

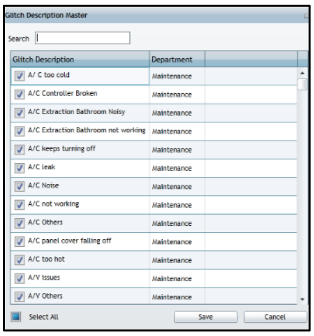
6. Log in to the Service portal using the administrator credentials and select **Configuration (** **)**.
7. Select **Glitch Manager**.



8. Select **Glitch Description Master**.



A window appears. It displays all the Glitch descriptions available in the Corporate Admin portal.



9. Select the box next to the relevant glitch description and select **Save**.

   The new Glitch description has been added now.

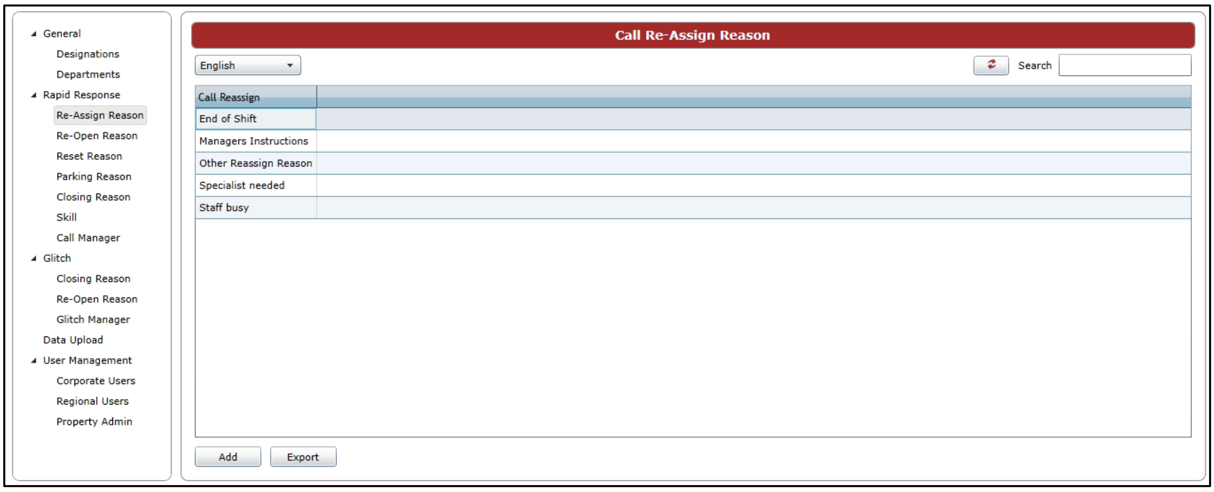
Additional information on adding a new Glitch description:

Within a multi-property setup:

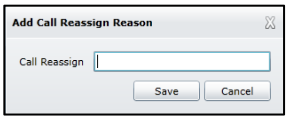
- Although new glitches are available to all linked properties, they must be activated by each property.
- Edited (renamed) existing glitches /categories immediately affect all linked properties.

Adding action reasons

1. Log in to the Corporate Admin portal.
2. From the left pane, select the **Call Manager** link.
3. Under **Rapid Response** or **Glitch**, select the action for which to add or edit an existing reason.



4. Either right-click an existing reason to edit or select **Add** to add a new reason.



5. Enter the new reason and select **Save** to confirm. The new reason is now created and will be active.

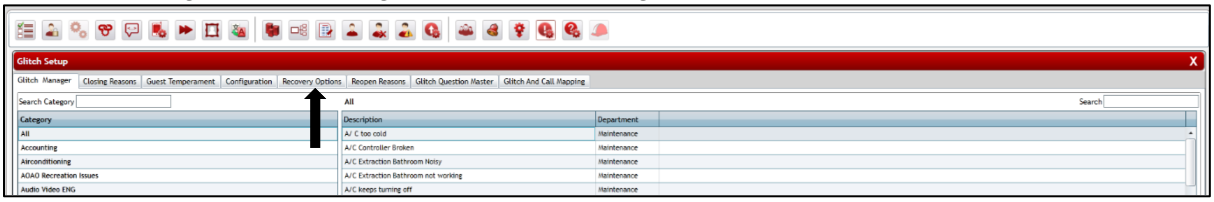
Additional information on adding action reasons:

- Within a multi-property setup, newly created reasons are available to all linked properties.
- You cannot delete created reasons.

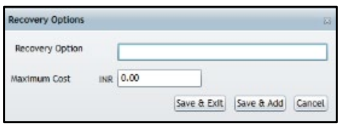
Adding recovery options

You can add, edit, or delete recovery options as needed.

1. From the Configuration menu, go to the Glitch Manager and select Recovery Options.



2. Right-click to add a new Recovery Option or edit to update an existing one.
3. Enter the **Recovery Option** and **Maximum Cost**. If the maximum cost is unknown, leave as 0.



4. **Save** and exit.

Additional information on adding recovery options:

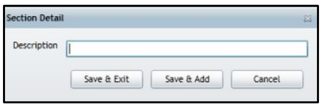
- A warning message appears if you exceed the maximum cost in the Glitch Console while registering a recovery.
- When configuring recoveries, use cost or sales prices consistently across all recoveries to improve reporting.

Creating a section in Service

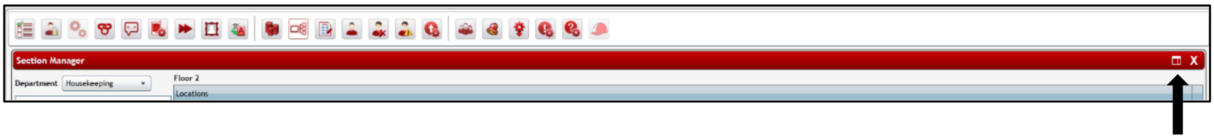
From the Section Manager, you can edit existing sections, or create new ones as required. Sections allow you to separate locations from each other if different staff members within a team are responsible for different areas. Each department can have its own setup.

1. Access **Configuration** from the home screen.
2. Select **Section Manager**.

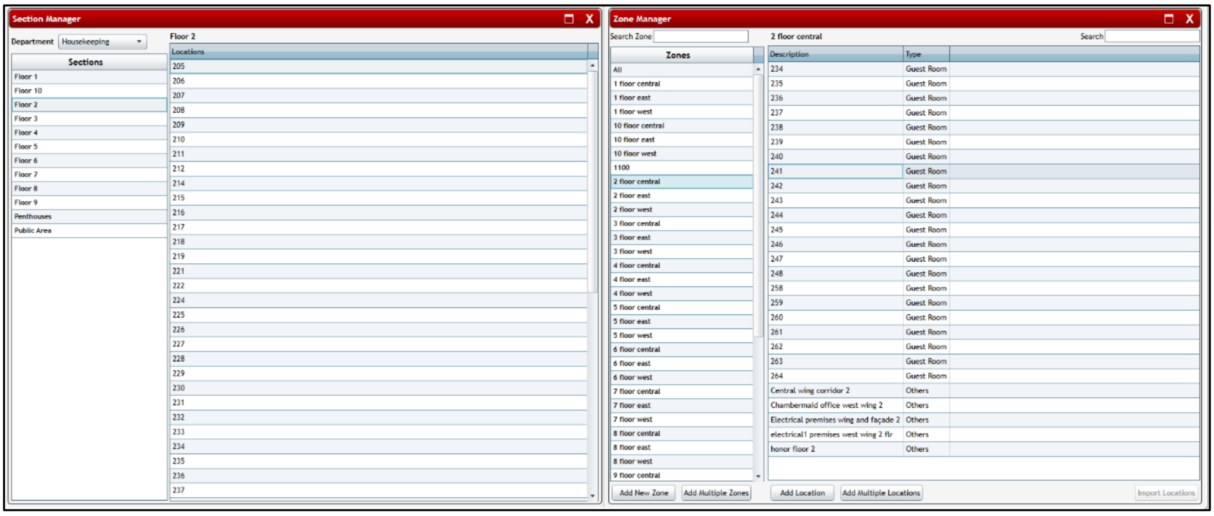
3. Select the relevant department.
4. Right-click in the left-hand pane to add a new section



5. Enter the required name.
6. Use the split-screen view to access the hotel's locations.



7. Drag the required locations to the required sections.



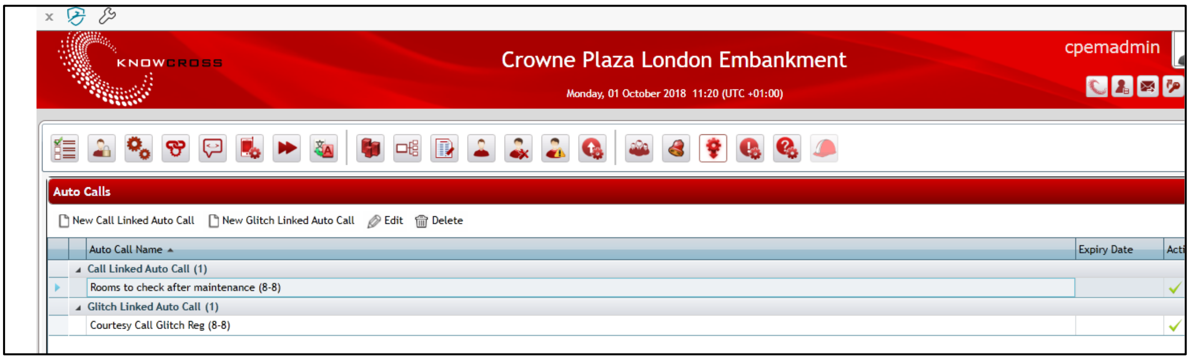
Additional information on creating sections:

- Although each department can have its own setup, sections must be named uniquely.
- A location may be mapped to only one section in a department.
- To ensure that no jobs go unassigned, all locations should be mapped.

Creating a Service auto call

Auto Calls can be initiated based on events that happen either within Service, Glitch, or your PMS.

> **Note:** These jobs are sequenced so that an activity/event on a preceding job initiates the subsequent job.



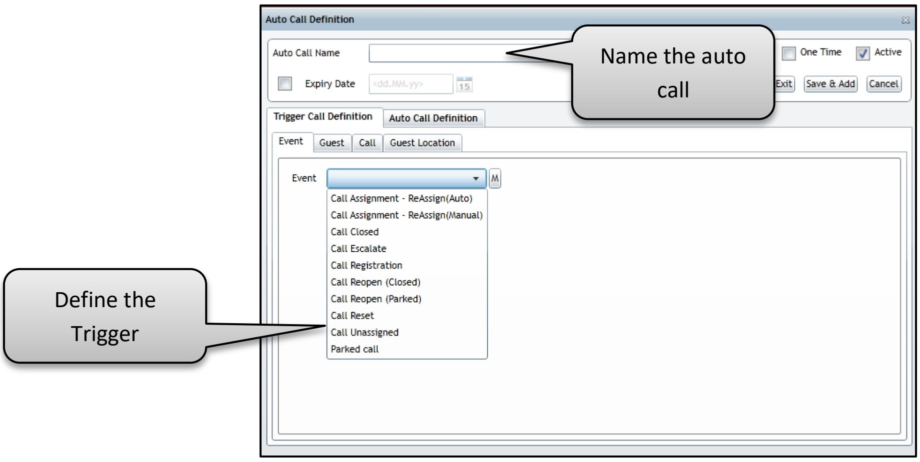
To create a new Call Linked Auto Call:

1. Select the relevant button at the top of the Auto Call Screen.

   The Auto Call Definition window appears..

2. Enter an **Auto Call Name**.

3. Select the **Active** checkbox to activate the Auto Call.



In the first part of the Auto Call configuration, you must define the preceding job and the associated set of conditions.

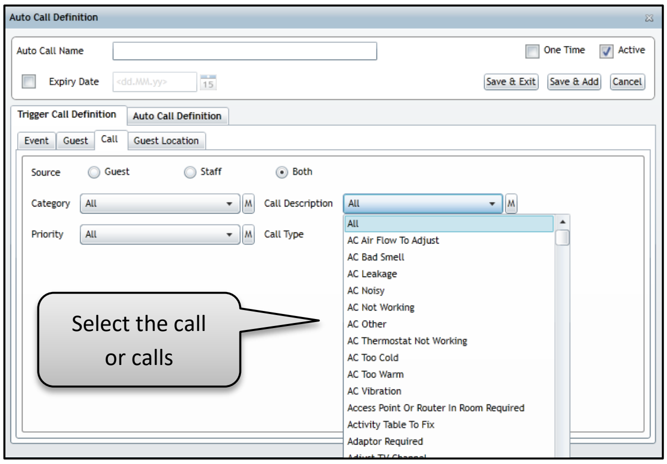
Steps to create the Trigger Definition

1. Select an event that will be used as a trigger to initiate the Auto Call (Call Registration, call Close, and so on). For example, if you select the event Call Closed, the auto call is triggered only when the selected job is closed.

2. Select the Job from the **Call** tab that will trigger the auto call. You can select one or multiple jobs from the call description field. To select multiple jobs, select the **M** button.

3. Complete the filters according to the requirements.

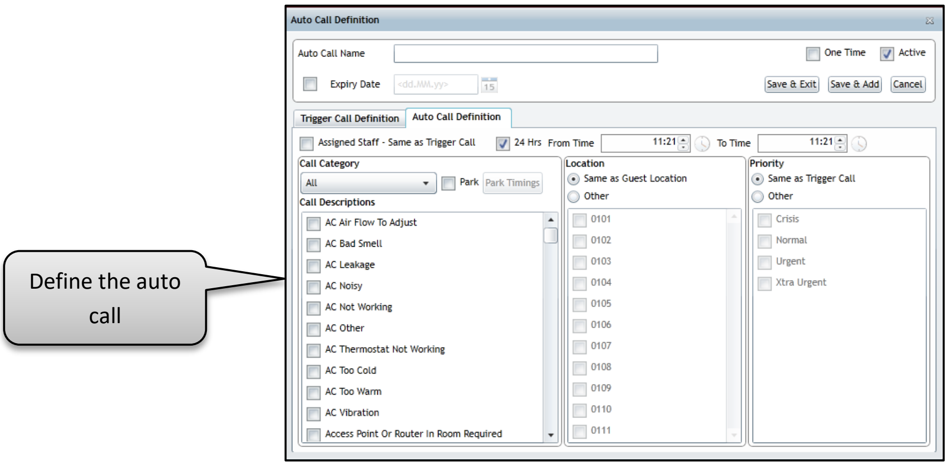
> **Important:** The filters denote *And*, not *Or*. For example, when you select a call and then select any one of the VIP filters, the resulting job is triggered only when both the conditions (the call and the VIP status) are met.



Auto Call Definition

Choose the job that will be created when the trigger parameters are met.

1. Select the job that will be triggered from the call description field. If necessary, you can select the call category from the drop-down list.
2. The **Same location** option is selected by default. If you want the auto job to be triggered for another location, select the **Other** option and then the location where you want the job to be triggered.
3. Save and exit.



Additional information on auto calls:

- The Park option makes the Park Timings option available. The Auto Call can then be set to trigger with a delay or gap after the PMS Trigger Event.
- The Auto Call can be set to trigger either 24 hours a day or within a particular duration.
- The Location can be the same as the guest's location (guest's room) or a public area/back of house area.

Example of an Auto call

Scenario: The User wants a *Room to clean* job to be sent to housekeeping whenever engineering closes a plumbing job in a vacant guest room.

Solutions:

- The Trigger Definition: Call Close.

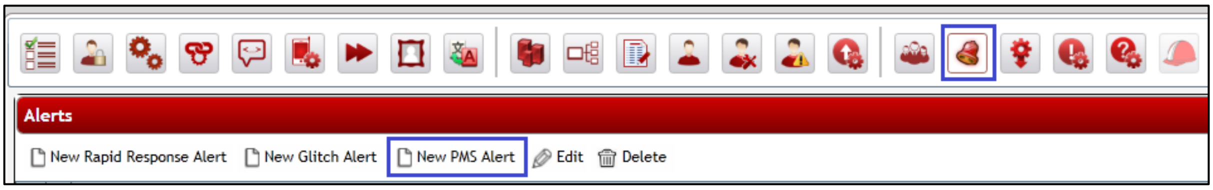
- Trigger Job: All Plumbing jobs. You can either use the **M** button to select all call descriptions or select the **Plumbing** category.
- Check the unoccupied button in room status under the guest location tab.
- Auto call definition—Select the **Housekeeping** category and then the Job **Room to clean**. You can choose to trigger the auto job immediately after the plumbing job gets closed or hold the job for a specified time period.

Creating a PMS alert

PMS Alerts are triggered based on Property Management System (PMS) events like check-ins, check-outs, and room moves.

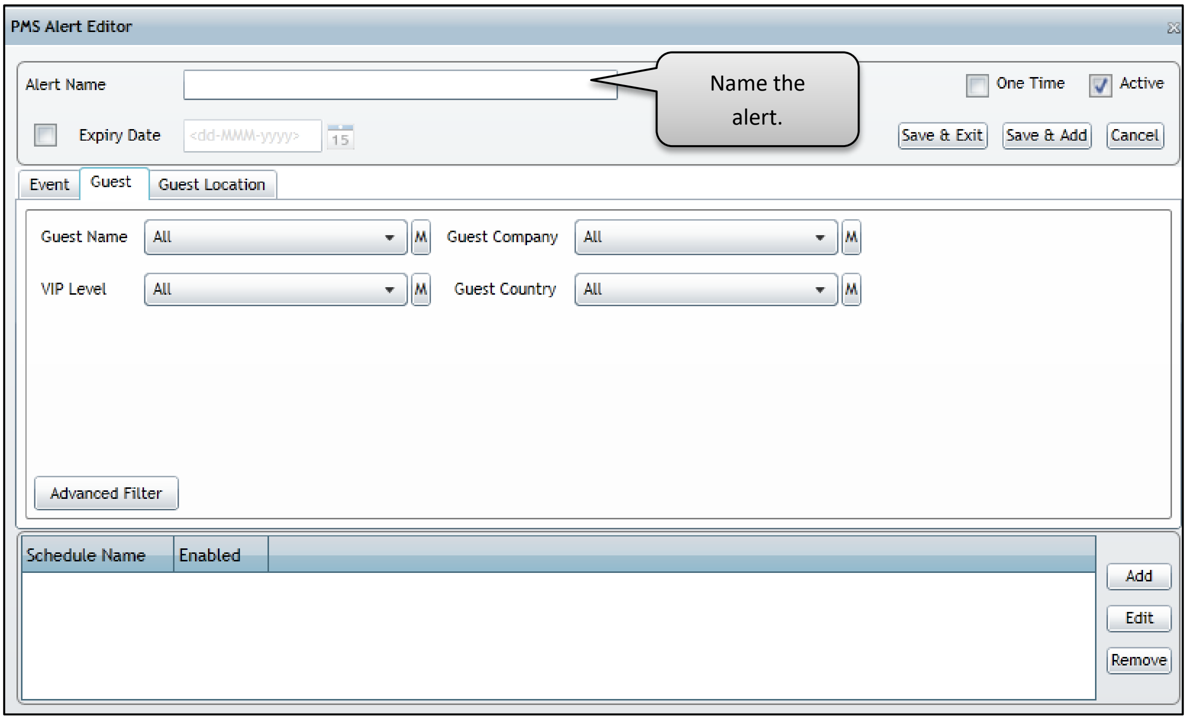
To create a new PMS Alert:

1. Select the **New PMS Alert** tab at the top of the **Alerts** screen.

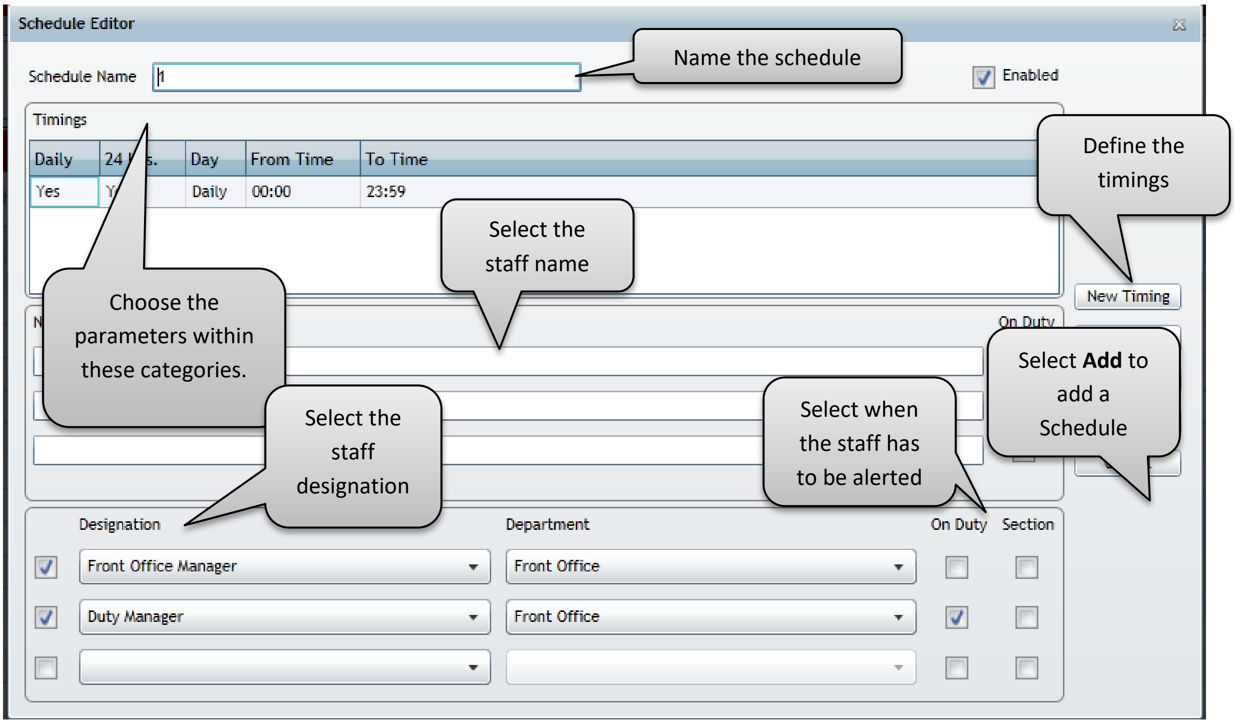


A configuration window appears.

2. Select the parameters for the alert.



3. Add the **Schedule**.

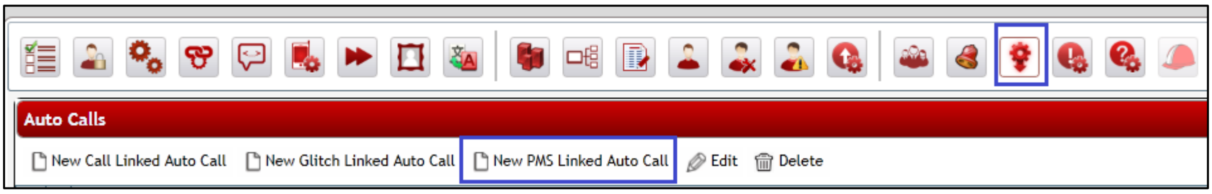


Additional information on creating a PMS alert:

- For ease of use, link the alert to the staff member(s) *designation*, not by name. If an employee leaves, you do not need to change the schedule if it is based on the designation.
- You can create multiple schedules for the same alert.

Creating a PMS Auto Call

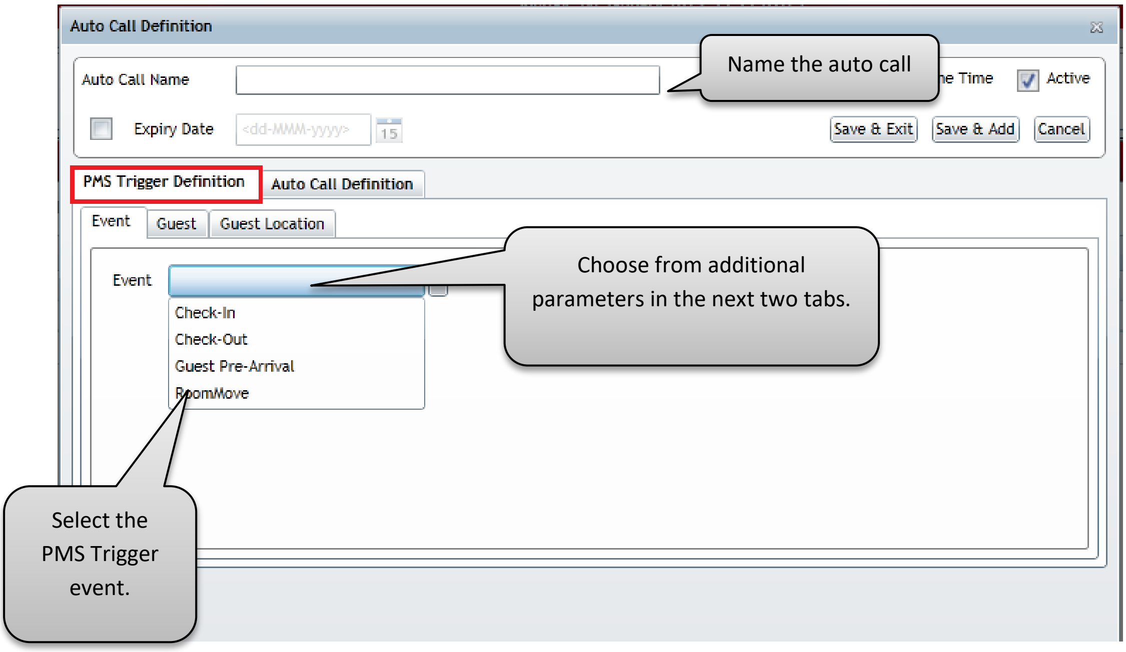
Auto-Calls are Service jobs sequenced in such a way that an activity or event initiates a job.



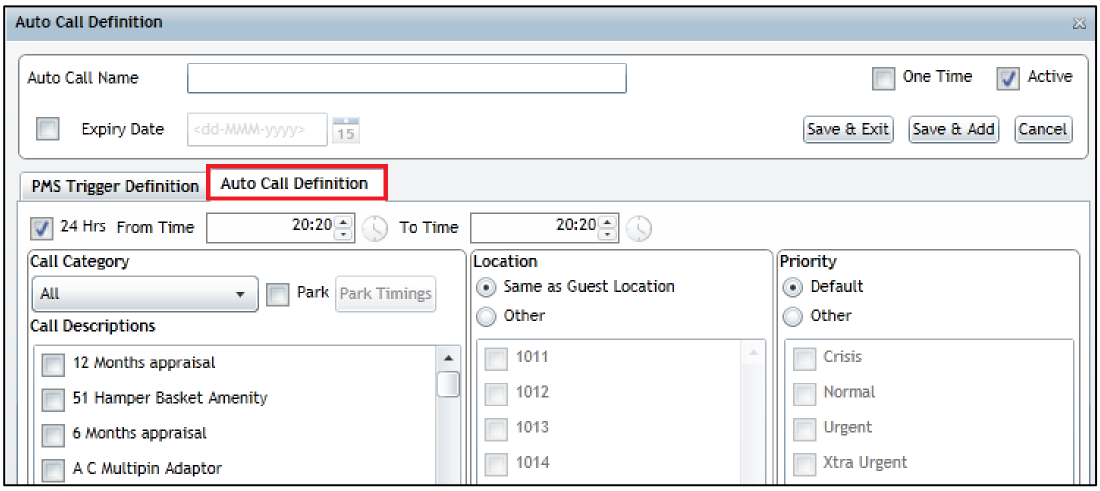
1. Select the **New PMS Linked Auto Call** tab at the top of the Auto Calls screen.

   A configuration window appears.

2. Define the PMS Trigger events (Check-In/Check-Out/Room Move and, based on the type of PMS Interface, Pre-Arrival).



3. Define the Service job that will be triggered by the selected PMS Event(s).
4. Select the **Auto Call Definition** tab.
5. Select the **Call Descriptions** and other conditions to complete the configuration.



Additional information on creating PMS Auto Calls:

- The Park option makes the Park Timings option available. The Auto Call can then be set to trigger with a delay or gap after the PMS Trigger Event.
- The Auto Call can be set to trigger either 24 hours a day or within a particular duration.
- The Location can be the same as the guest's location (guest's room) or a public area/back of house area.

Discovering why jobs are going unassigned

Although there can be many reasons why jobs go unassigned, the following are the most common:

Missing skills: Each job is part of a category, and the category is linked to a skill. Every staff member possesses a set of skills. Therefore, if there is no one with the required skills to do the job, the job will go unassigned. To rectify, assign the appropriate skills to appropriate staff members.

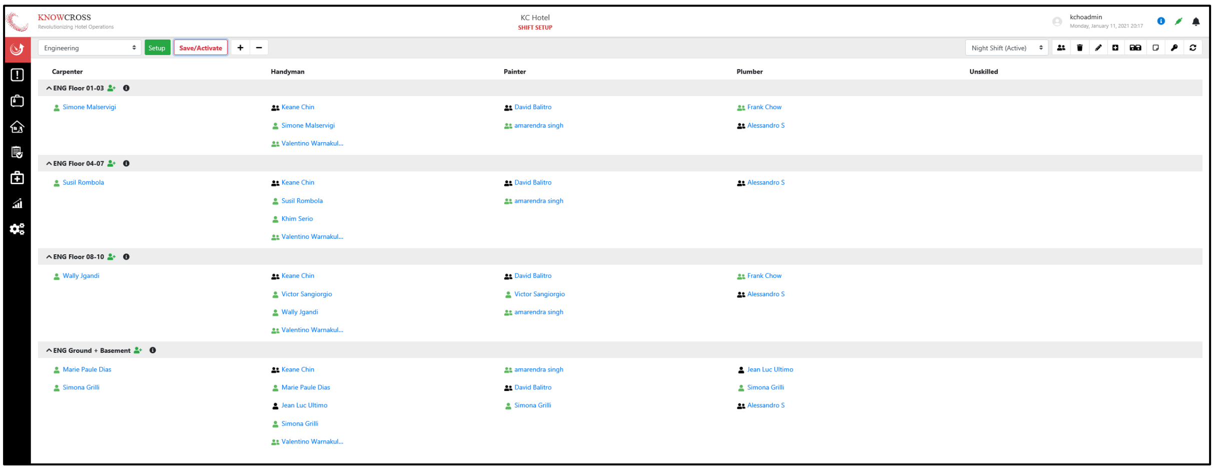
Unavailability of staff: If the staff has the skills but has not logged in to the shift setup, the jobs will be unassigned. To make them available, go to shift setup, select the person's name and log in.

Section allocation: If a skilled staff is available (logged in) but has not been assigned a section to work in, the system will not automatically assign any jobs.

User mapped to this Skill+Section combination and logged in to the shift.

User mapped to this Skill+Section combination but not logged in to the shift.

or User mapped to this and other sections.



There are various ways that you can update the shift setup. The easiest two are:

- Staff member is present in the visible shift setup:
  1. Select the name (in blue).
  2. To change the skill, select the skills (in blue).
  3. Add/remove skills, as required.
  4. To change the section, select the section (in blue).
  5. Add/remove sections, as required.
  6. To confirm changes, select **OK**.
  7. To confirm the new shift, select **Save/Activate**.

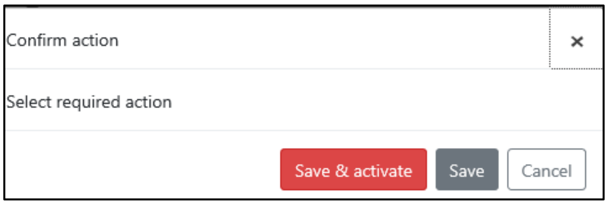
- Staff member is not present in the visible shift setup:
  1. Select Setup (button in green).
  2. Select the name (in blue).
  3. To change the skill, select the skills (in blue).

4. Add/remove skills, as required.
5. To change the section, select the section (in blue).
6. Add/remove sections, as required.
7. To confirm changes, select **OK**.
8. To confirm the new shift, select **Save/Activate**.

If the setup is correct, you might have forgotten to activate the shift.

To activate a shift:

- If you have made any changes to a shift, always select **Save/Activate**.



A confirmation dialog box appears.

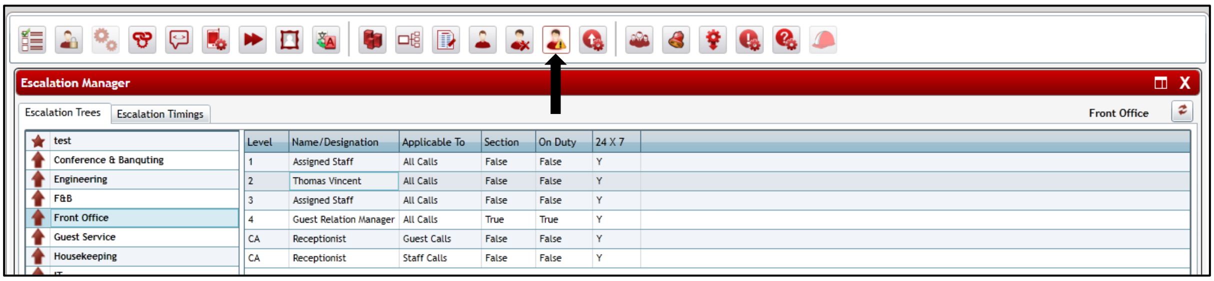
Additional information on discovering why jobs are unassigned:

- If there are no issues with the shift setup, check whether the location is mapped to the correct section for the relevant department.
- If the sections or skills are shown in gray instead of blue, you do not have the rights to make changes.

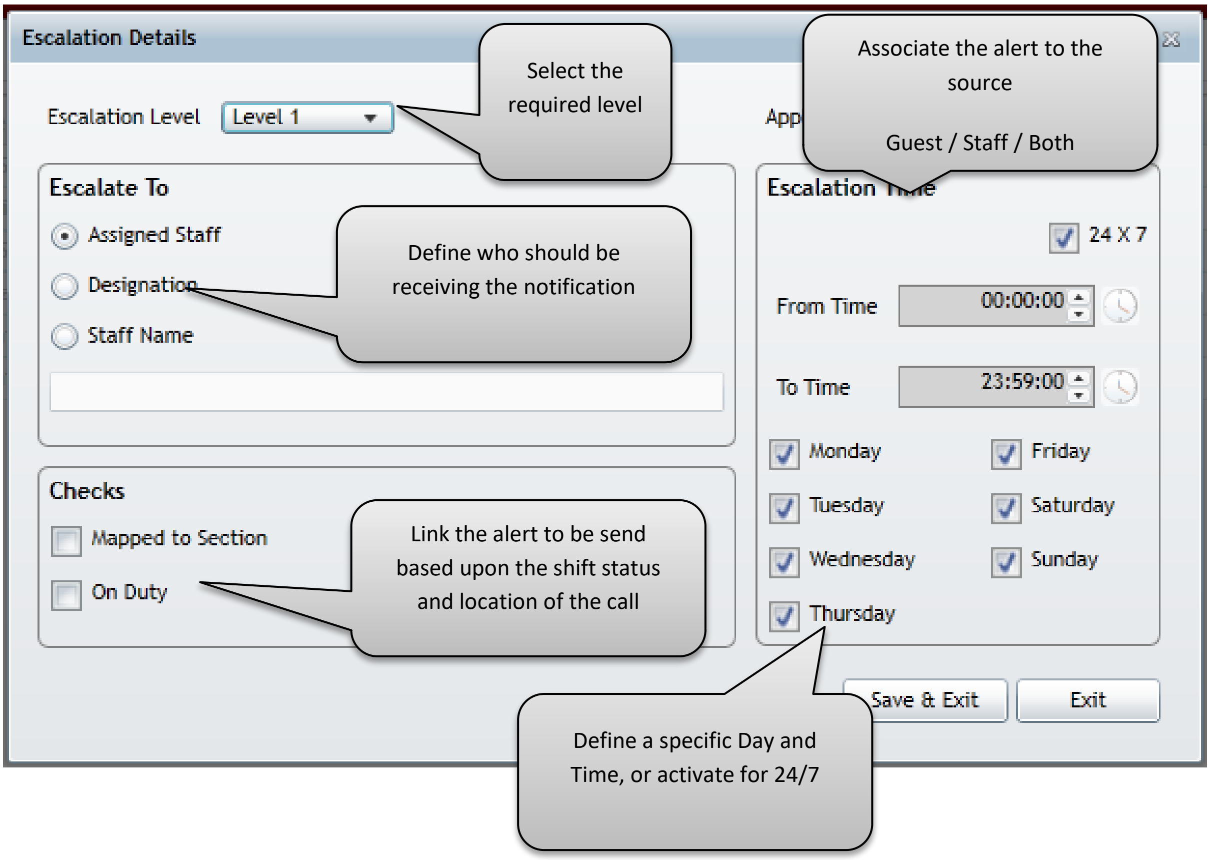
Creating an escalation tree in Service

Before the MRT expires, you can escalate jobs that are not closed in Service. An escalation alert can help with maintaining brand standards and reducing missed jobs.

In the Escalation Manager you define in which order staff members are alerted.



1. Access **Configuration** from the home screen.
2. Select **Escalation Manager**.
3. Select the relevant department to see the configured tree.
4. Right-click in the main pane to add or change configuration.

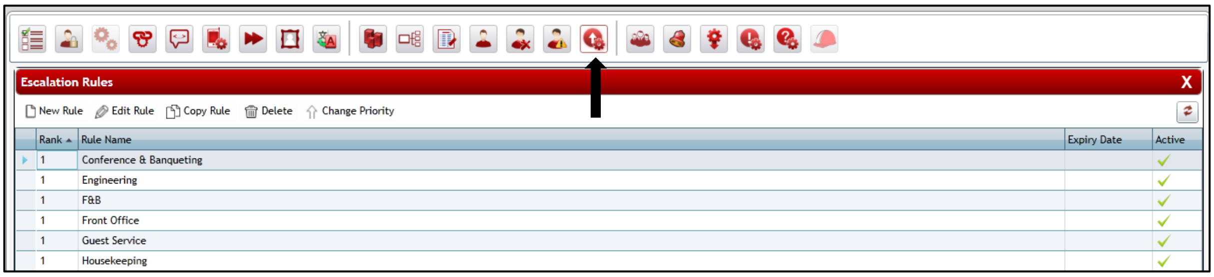


Additional information on creating an escalation tree in Service:

- Escalations are best configured to the respective designation, not to a named staff member.
- You can have multiple designations on each level.
- A designation can be configured in multiple trees.

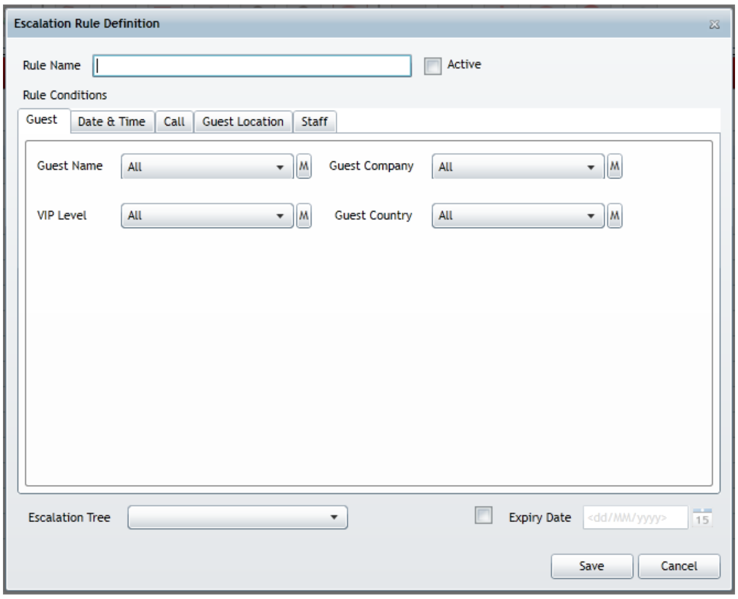
Creating an escalation rule in Service

In the Escalation Rules, you define which jobs are escalated and under which conditions. Escalation rules can only be used together with the rules in the Escalation Tree.

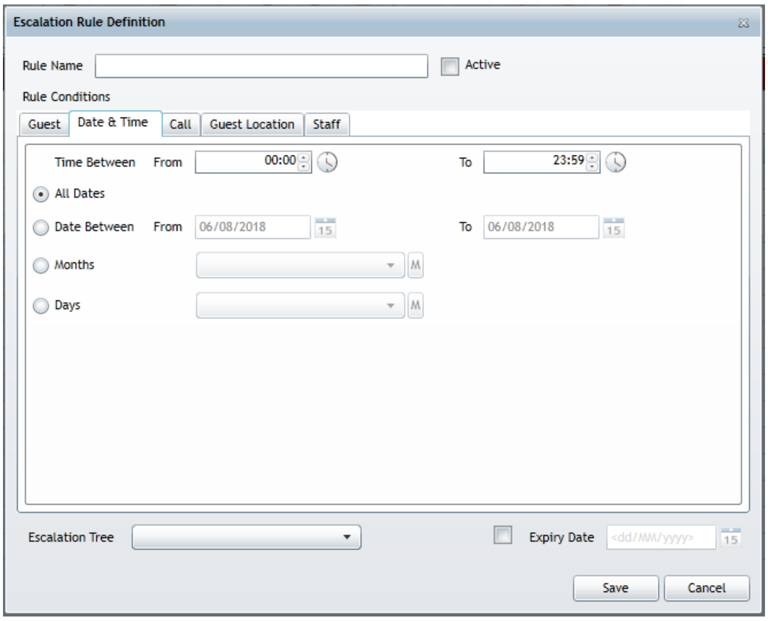


1. Access **Configuration** from the home screen.
2. Select Escalation Rules.
3. Select **New Rule** to configure a new rule or select and right-click to edit an existing one.

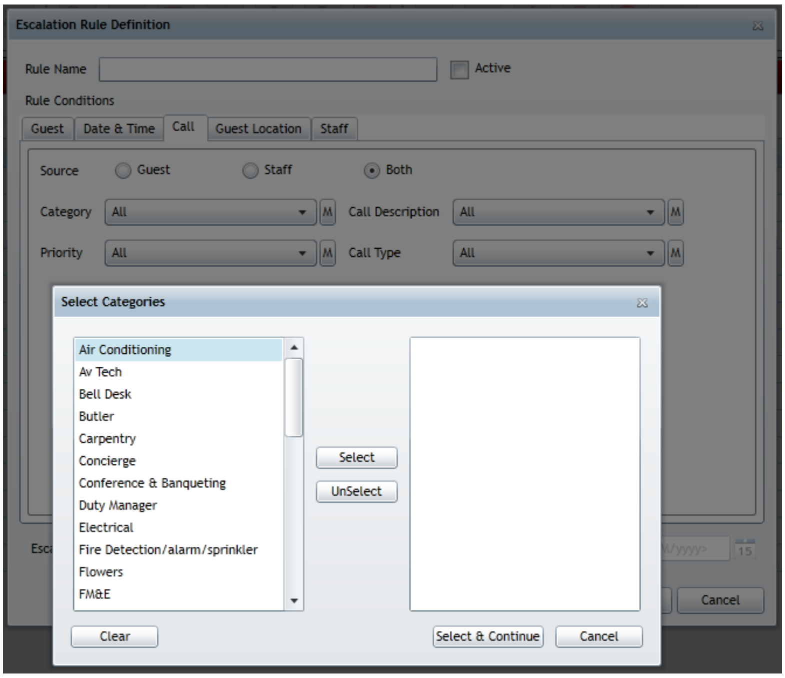
   The Escalation Rule Definition dialog box appears.
4. In the Guest tab:
   - Name the rule and select **Active** to use.
   - Define whether this rule should be specific to certain guests only.



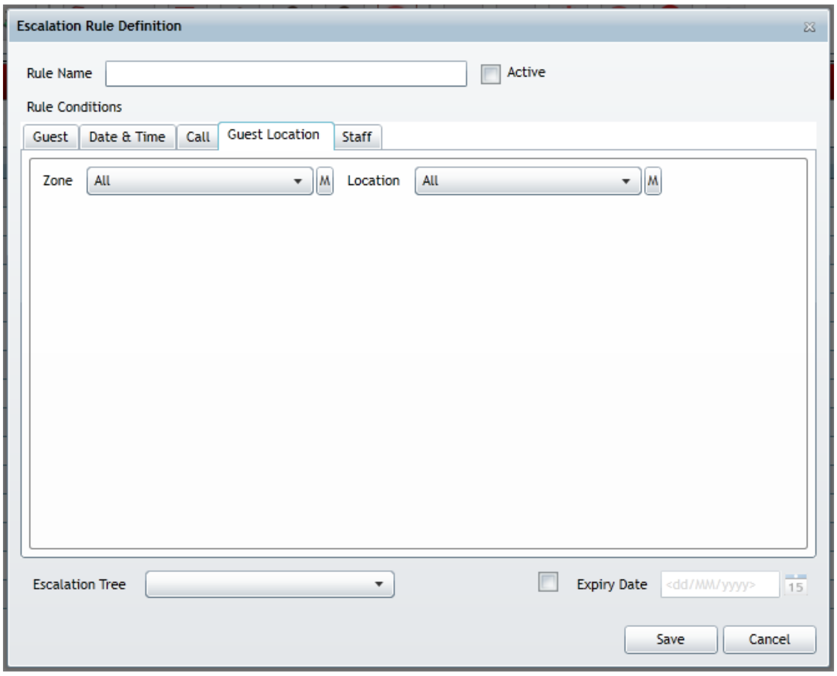
5. In the **Date and Time** tab, specify whether this rule should be specific to certain times only.



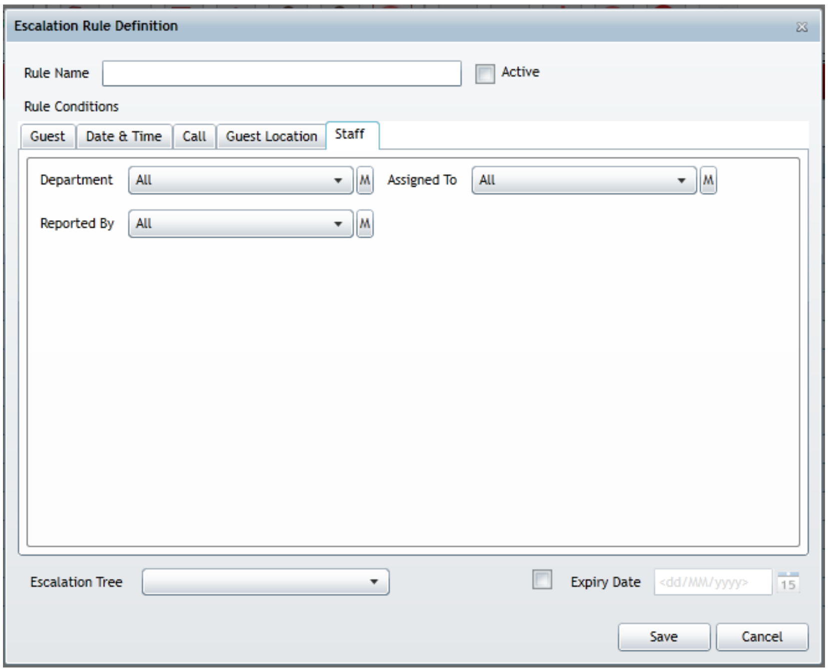
6. In the **Call** tab, define which calls should be considered. Use the **M** button to select multiple categories.



7. In the **Guest Location** tab, specify the location(s) that should be applied.



8. In the **Staff** tab:
   - Specify the staff members to whom this rule should apply.
   - From the **Escalation Tree** drop-down list, select the applicable tree for this rule.



9. Select **Save**.

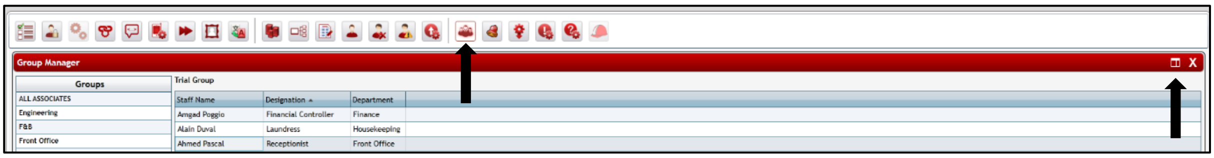
Additional information on creating an escalation rule in Service:

- If you want to escalate all jobs from a specific department, select all jobs in the relevant department in the **Staff** tab.
- An escalated job follows only one escalation tree.

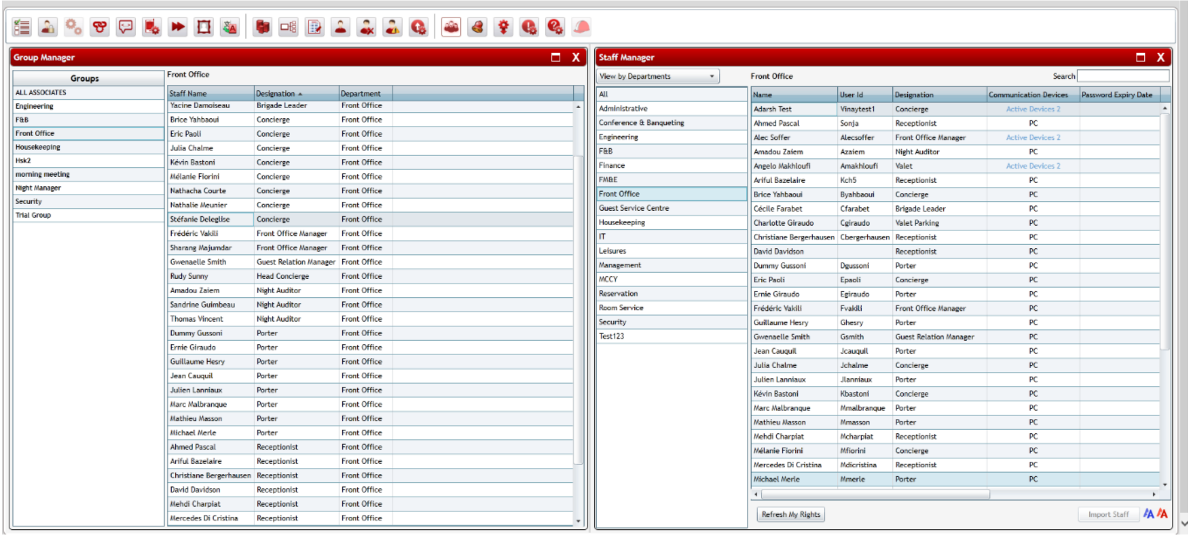
Creating messaging groups

In Service and Glitch, you use groups to send messages to multiple staff members at the same time.

1. Access **Configuration** from the home screen.
2. Select **Group Managers**.
3. Use the split screen function to view the **Staff Manager**.

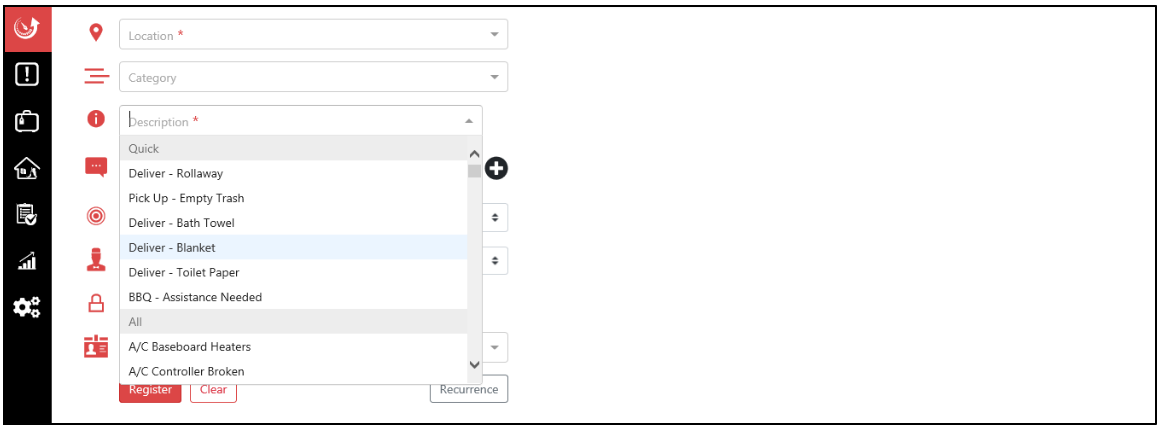


4. Drag staff members from the **Staff Manager** to existing groups.
5. Use **Add** to create new groups. Use **Delete** to remove users from groups.

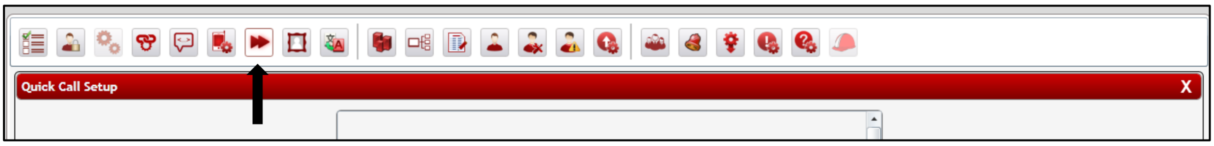


Configuring quick calls

With quick calls, every department can configure their six most reported jobs to appear as the first jobs in the call description field. This configuration expedites the registration process.



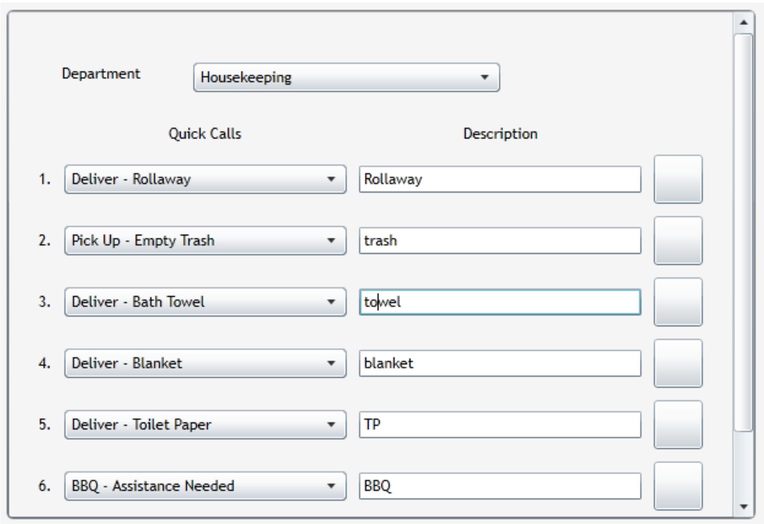
1. Access **Configuration** from the home screen.
2. Select **Quick Calls**.



3. Select the department that will be registering the jobs.
4. Select the six jobs and update the name field.

Best practice: The name should match the job description.

5. Select **Save**.



Additional information on quick calls:

- Every department can have their own quick calls.
- Quick calls can be changed regularly.

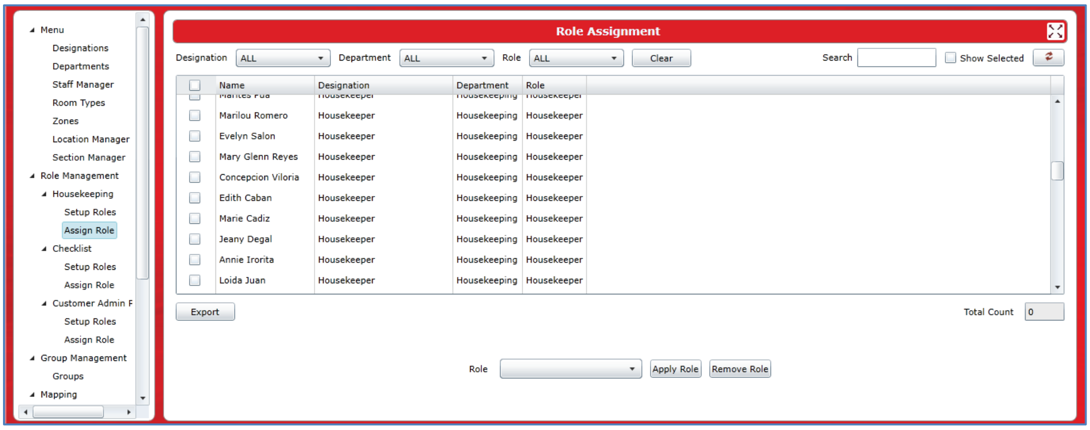
Housekeeping and Inspection access

Administrators can grant access to Housekeeping and Inspection from the Customer Admin Portal (www.tritononline.com). Users are created in the main configuration.

Assigning rights to Housekeeping and Inspection

If no rights are applied, the user will receive an *access denied* message upon logging in to Housekeeping /Inspection. To prevent this, you must assign a role to every staff member that requires access.

1. Log in and go to the **Role Management** menu.
2. Select **Housekeeping/Inspection** > **Assign Role**.
3. Select the staff member or members.
4. From the **Role** drop-down list, select the appropriate right and apply.



Note: Staff members must be created in the main configuration. For more information, see *Creating a new staff member*.

Changing rights for Housekeeping/Inspection users

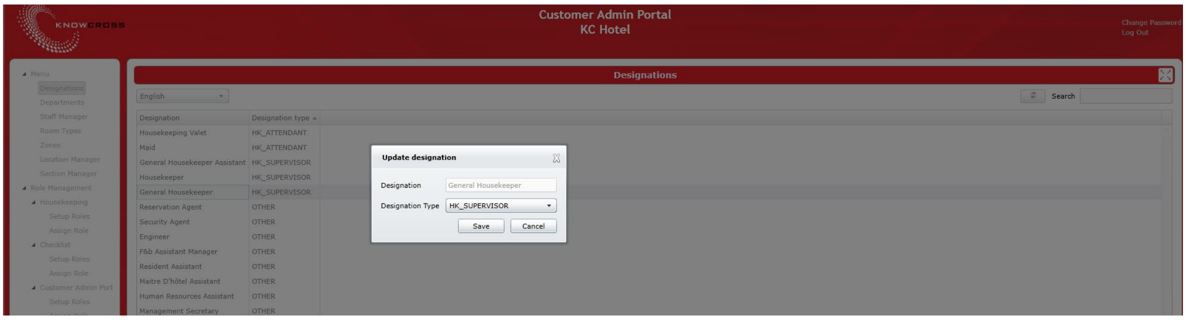
All rights to Housekeeping/Inspection are controlled by a user role. Use the Role Management feature to update rights.

1. Log in and go to the **Role Management** menu.
2. Select Housekeeping/Inspection > Assign Role.
3. Right-click on the role you want to change or select **add**.
4. Select the relevant rights and save.
5. Users must log out and back in for the new rights to become active.

Changing between Room Attendant and Supervisor app

Housekeeping has two different levels of access within the HK app that are not associated with assigned roles: Room Attendant access and Supervisor Access. Which version you have access to when you log in is based on your designation. If your designation requires access to the other version, you can change this from the Designation Menu, accessed on the Customer Admin Portal.

1. Log in and go to the **Designations** menu.
2. Right-click the designation you want to change.
3. Save and exit.



Note: Because this is linked to the designation, it affects all users with that designation.

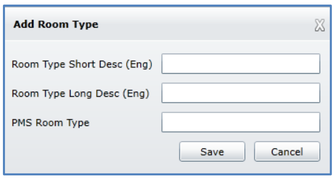
Housekeeping configuration

Changing Housekeeping room types

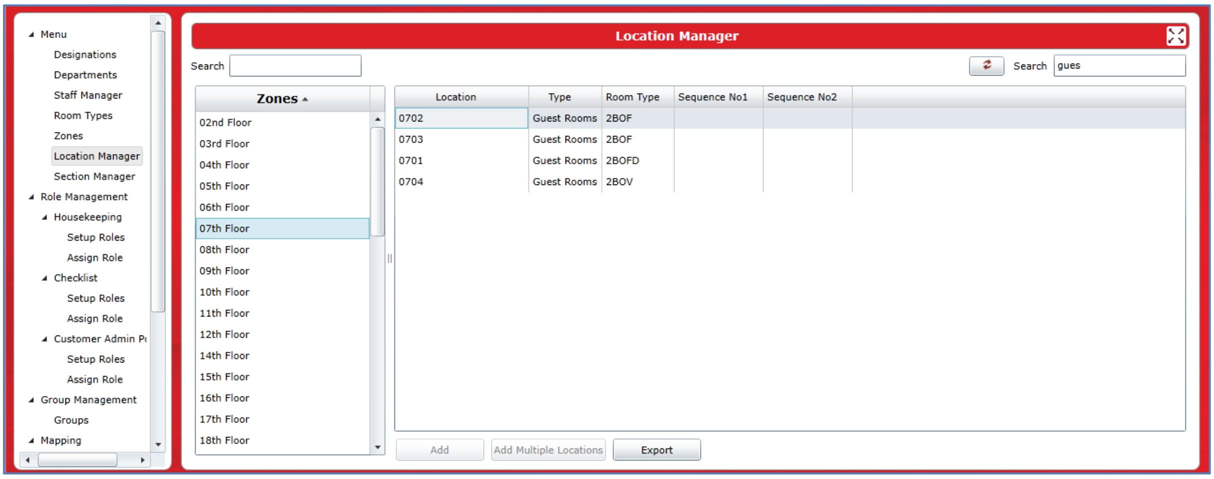
As rooms change, the relevant room type must be adjusted to ensure the correct Time and Credits or Checklist are applied.

All configured room types are listed in the Room Types menu on the Customer Admin Portal. While they generally match your PMS, they do not have to be identical.

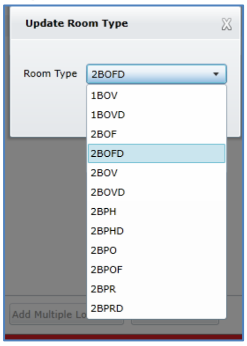
1. To Add new Room Types, select **Add** and complete the fields.



2. Select **Save**.
3. Go to the Location Manager.
4. Select the zone where the room is located.
5. Select the room number, right-click, and select **Change Room Type**.



6. From the drop-down list, select the new room type and save.



Additional information on changing Housekeeping room types:

- If you are creating a new room type, the following items must be completed in the Housekeeping DB setup:
  - Assign Linen*
  - Assign Checklist
  - FM Rule Allocation
  - Inspection Rules*

- Time Allocation (Time and Credits)

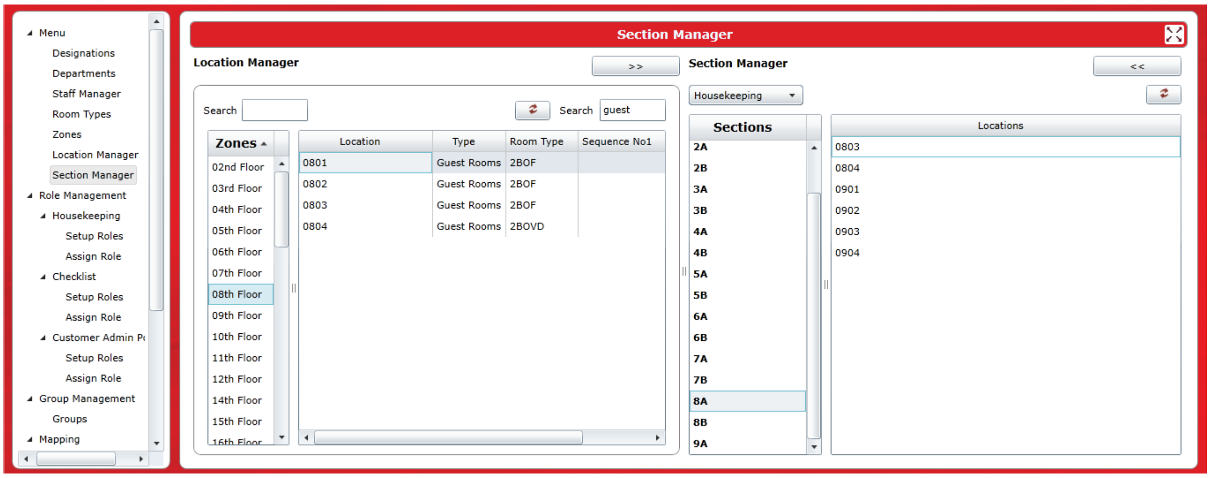
- In the location manager, search for “Guest Room” to eliminate all non-guest room locations.
- Room types can be different from PMS to allow for greater nuances in checklists or cleaning times.
- Ensure that changes are made without active task sheets.

* This module may not be active and does not need to be configured.

Changing Housekeeping sections

All rooms are grouped in sections that impact various settings within the Housekeeping system. You can move rooms or create new sections as required.

1. Select the Section Manager.
2. Select the **Housekeeping** department.
3. In the **Location Manager**, select the relevant location and drag to the relevant section on the right.
4. To delete, right-click the room/section and select **Delete**.
5. To add a section, right-click in the sections pane and select **Add**.



Additional information on changing Housekeeping sections:

- A room can be part of only one section. No duplications are allowed.
- Ensure that changes are made without active task sheets.
- Sections in the Sections Manager are independent of Service.
- In the location manager, use the search box to search for “Guest Rooms” only.
- Only locations with a *Room Type* should be mapped to a section.
- If you create a new section, remember that on the mobile app, supervisors must select the same.

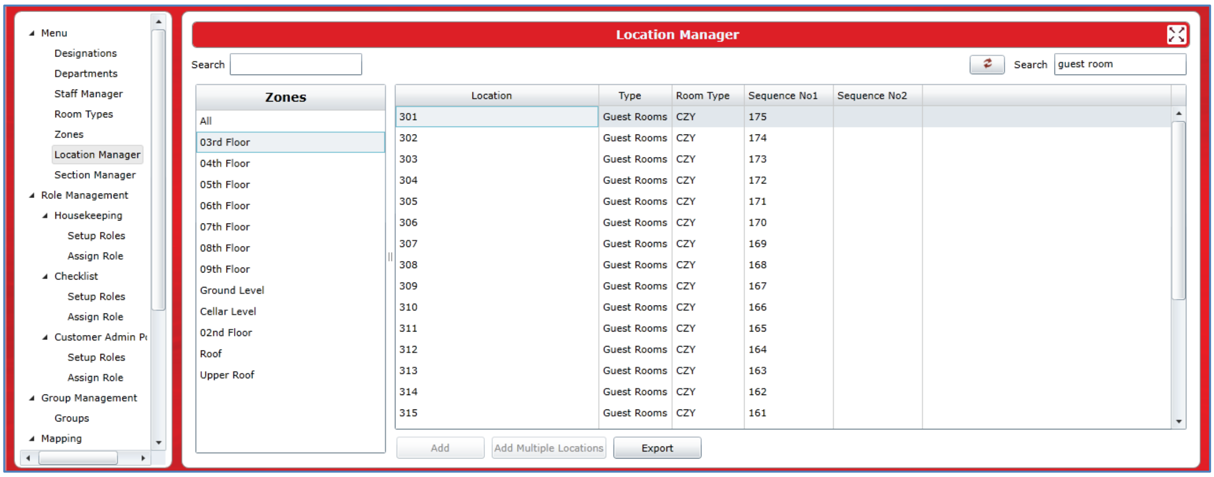
Changing the room sequence or order

Rooms are distributed normally in ascending numerical order. This means that the task sheet editor starts with the lowest room number first and follows the room number sequence.

By applying a *sequence number*, you can instruct the software to follow a different order that is configured independently from the room number. This method enhances the task sheet logic by placing rooms in the same task sheet that are closer to each other, regardless of the room number.

This sequence is manually defined.

1. Go to **Location Manager**.
2. Select the zone.
3. Right-click the relevant room and select **Edit**.
4. Complete the **Sequence 1** and, if applicable, **Sequence 2** numbers.



Additional information on changing the room sequence or order:

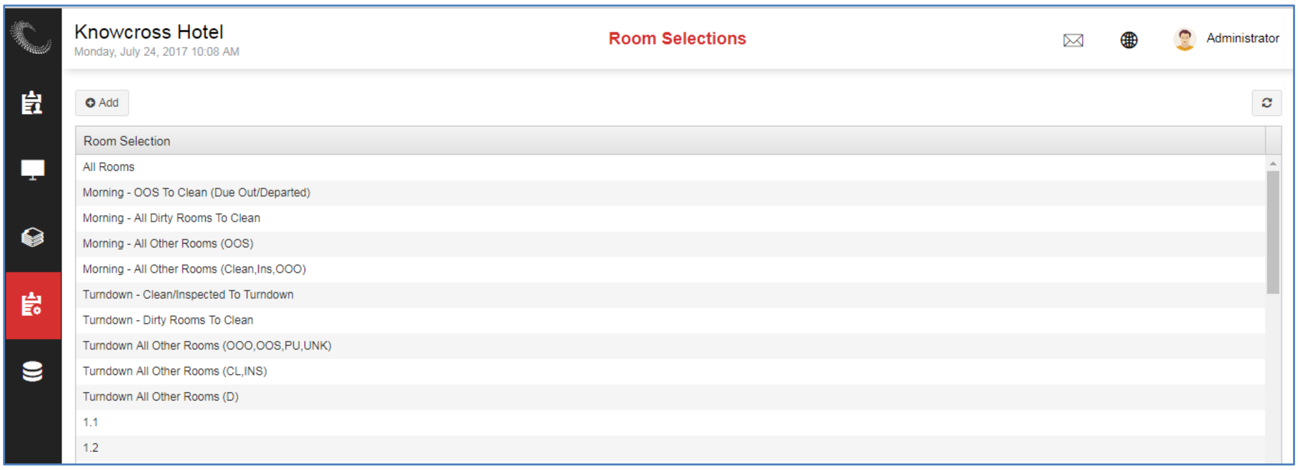
- In the **DB Setup** > **Application Settings**, **Order rooms by** must be set to **Sequence Number** for this to work. The default is Room Number.
- Cleaning Sequence, Fixed sections, room set, or other constrains may override the order in which rooms appear or are assigned.
- Sequence numbers accept decimal figures, so in case of missing a room, you can use a .5 value to “insert” the room number correctly, rather than redoing the list.

Creating or changing task sheet sets

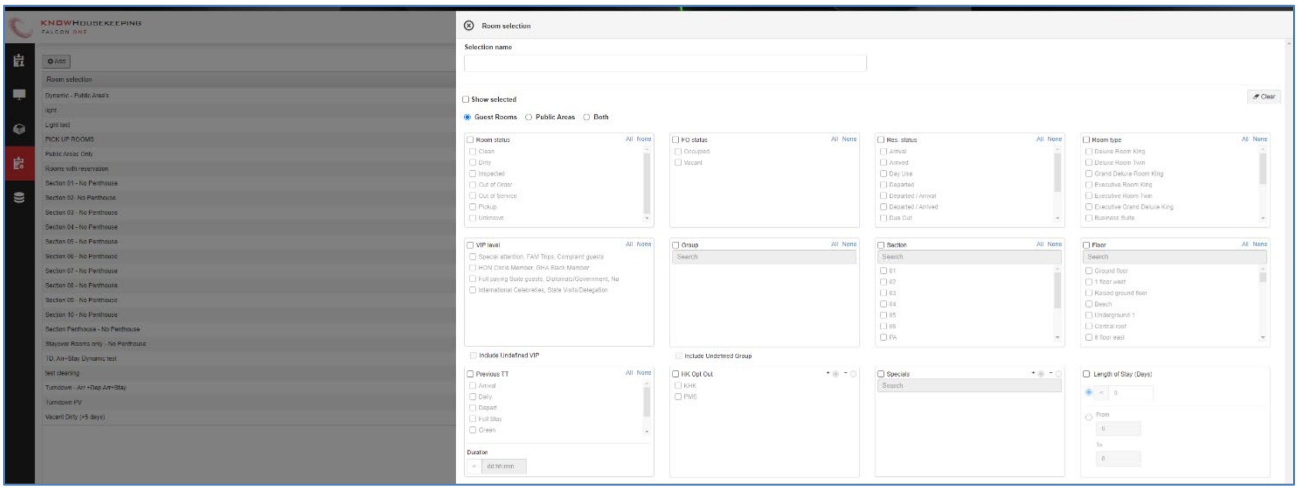
Generating task sheets is done in Task Sheet Sets. These sets are built from one or more room selections. These room selections have filters to apply and control which rooms appear in the subsequent task sheets and which task types are applied.

To update or create new task sheet sets, go to the **Room Selections** menu.

Previously saved room selections appear on the screen. Right-click to **Add** or **Edit** an existing rule.



You can select various parameters from the Room Selections screen to define a task sheet set.



Filters listed below apply to both **Guest Rooms** and **Public Areas**

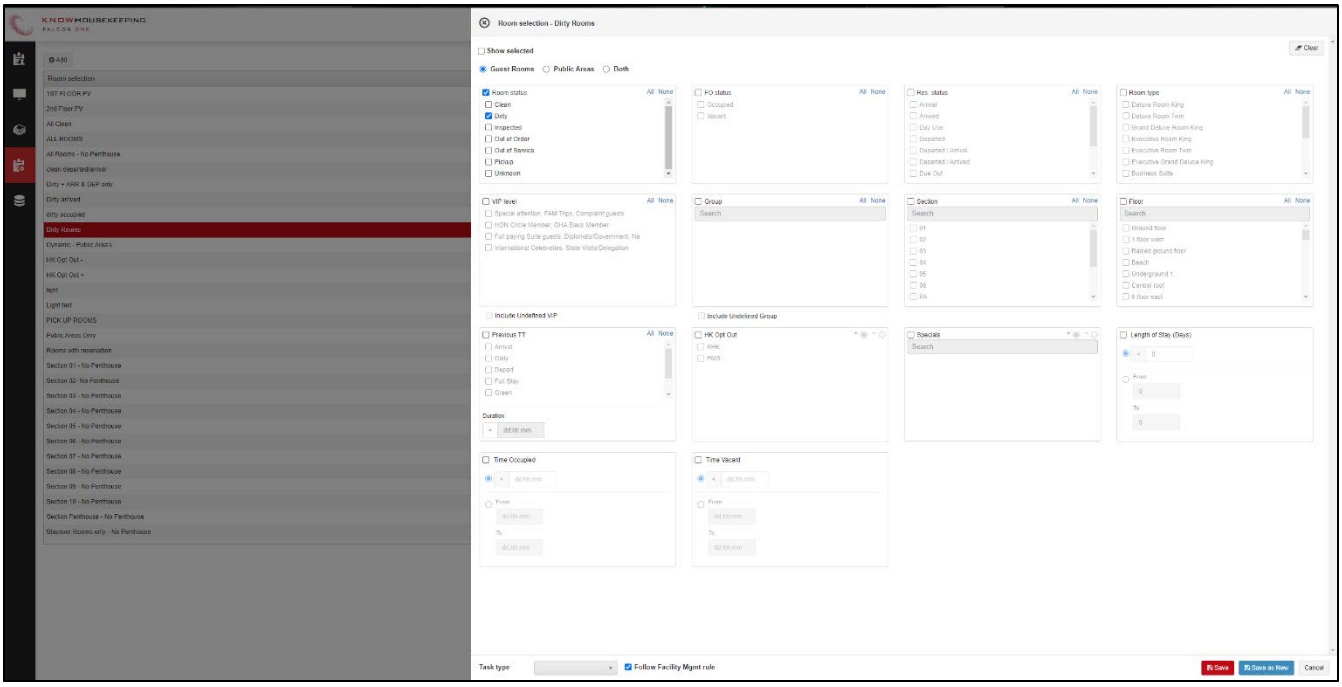
Room Status	Clean, Dirty, Pickup, Inspected and Out of Order.
Front Office Status	Choose from either Occupied or Vacant.
Reservation Status	Options pulled verbatim from PMS.
Room Type	Choose from existing room types in PMS.
VIP level	Choose from existing VIP levels in PMS.
Group Selection	Choose from existing block codes in PMS.
Section Chooser	Choose from existing and configured sections.
Floor Selection	Choose to provide floor service.
Previous Task Type	Choose from TT and a duration since.
HK Opt Out +/-	Include or exclude guest with a HK Opt Out active. This excludes HK Opt Out Active and includes those with HK Opt Out Active.
Specials	Choose from guest with specials in PMS.
Length of Stay	Choose from guest with a length of stay <, >, or between x and y days.

Time Occupied	Choose rooms that have been occupied <, >, or between x and y DD:HH:MM
Time Vacant	Choose rooms that have been vacant <, >, or between x and y DD:HH:MM
	To illustrate on how you could define your own selections, refer to the example below:
Single selection	Only Dirty rooms.
Dual combination	Dirty and Occupied.
Multiple combination	All Dirty rooms for VIP1 and VIP2, Occupied and Standard room only.

Once you have opted for the relevant filters, choose which task type should be applied to all locations. If you are using the automatic Task Type assignment, select **Follow Facility Management Rule**. Next, name your selection and select **Save**.

A common setup with three different room selections could be:

- Dirty rooms.
- Clean + Inspected + Pickup rooms.
- OOO + OOS + Unknown rooms.

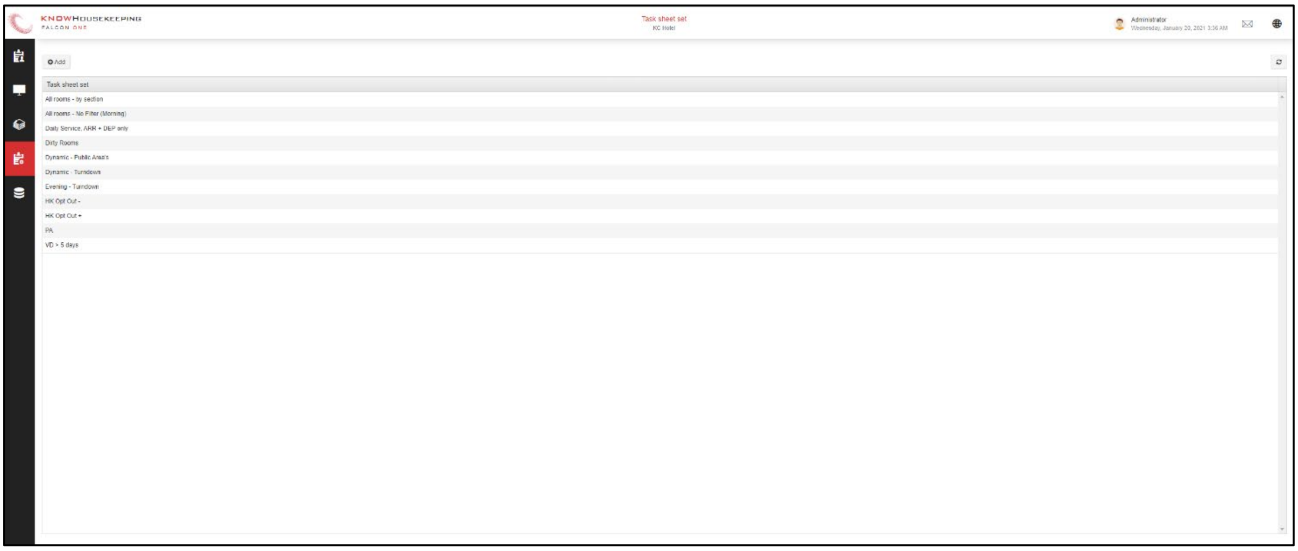


> **Note:** If you need to create multiple task sheet sets that are very similar in applied filters, use *Save as New* for ease of use.

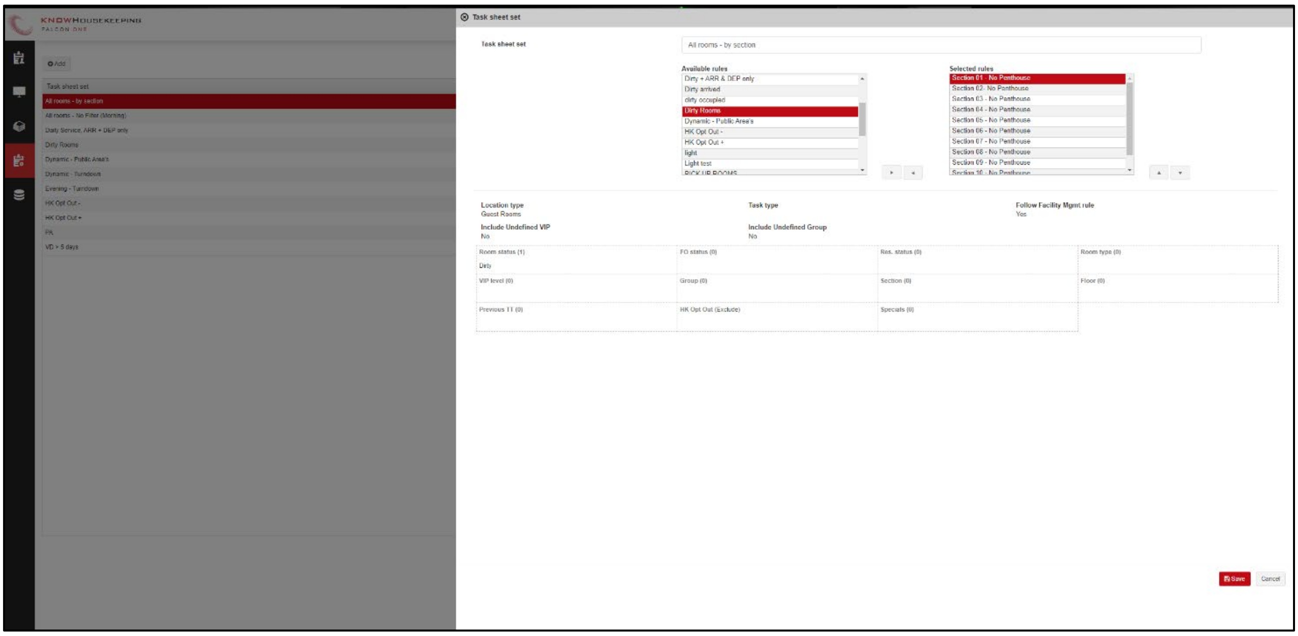
Next, go to the **Task Sheet Set** menu.

Here you can create **task sheets sets** using the **room selections** defined in the previous screen. Task sheet sets can be created for different shifts.

Previously saved sets appear on the right-hand side on the screen. Right-click and select **Edit** to edit an existing set or **Add** to create a new one.



In the **Task Sheet Set** menu, you can choose which room selections should be combined to create one set. Use the horizontal arrows to select rules and name the task sheet set. This name appears in the drop-down menu of the Task Sheet Editor screen.



Save when done.

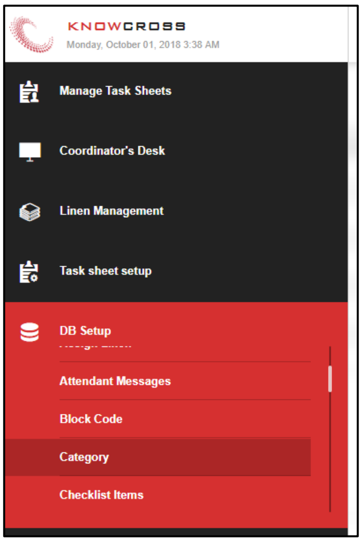
Additional information on creating or changing task sheet sets:

- When you select a rule in the left-hand column, you can view the applied filter/rules in the screen below.
- If you have selected multiple rules, you can organize the order in which they appear by using the up and down arrows.

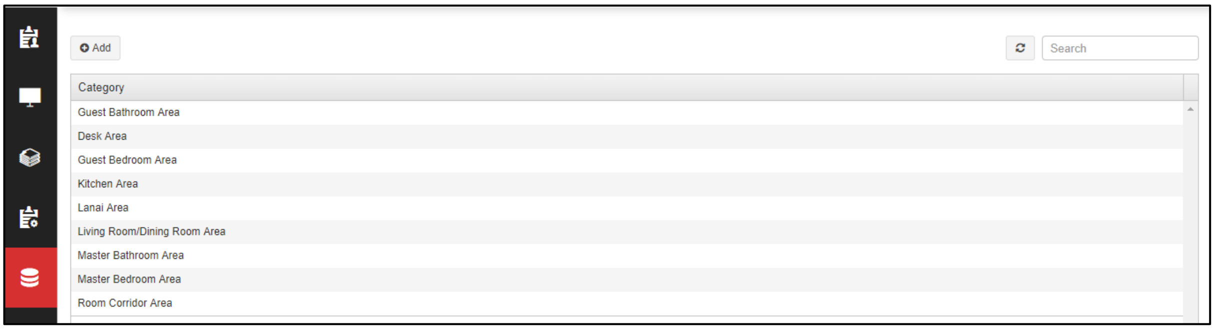
Creating a Housekeeping checklist

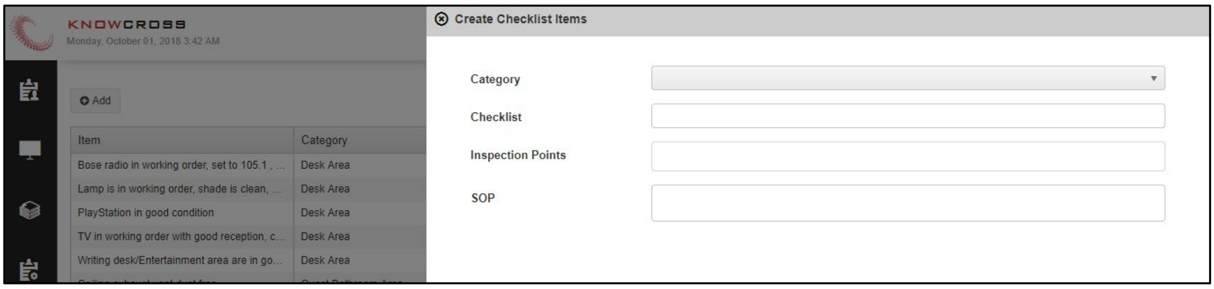
Checklists form an integral part of the Housekeeping software and allow room attendants to view their tasks. Supervisors can use checklists to ensure that rooms are cleaned to standards. Missed items can be tracked and reported in the software.

Housekeeping checklists are created and managed from the Housekeeping DB Setup.



1. Go to Category.
2. All questions are nested under a category. Edit the existing ones or select **Add** to create a new one.

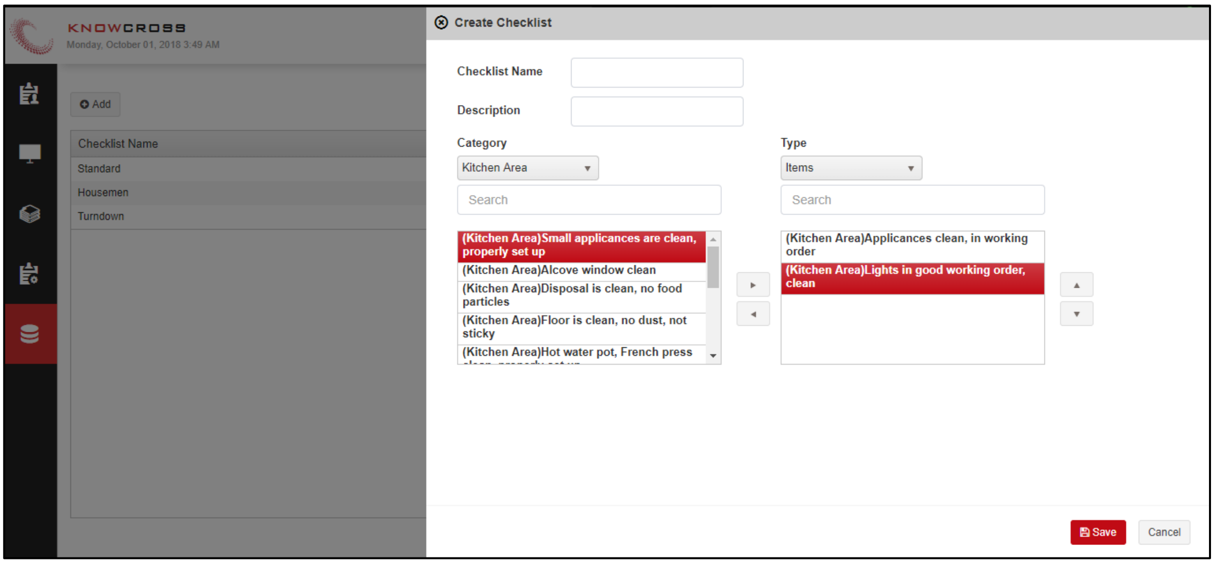




3. Go to Checklist Items.
4. All configured points are listed here. To add a new question, select **Add**.
    a. From the **Category** drop-down list, select the relevant category.
    b. In the **Checklist** field, enter the question or item that you want to add to the list.
    c. In the **Inspection Points** field, enter the value of the question for the scoring system.
    d. (Optional) In the **SOP** field, add more information about the question.
5. When finished, select **Save**.

6. To add a picture to the question, right-click the question and select **Manage Images**.
7. Browse to find the picture and upload.
8. Go to Checklist.

   Checklists are configured in this menu.
9. Select **Add** to create a new checklist.
10. Complete the **Checklist Name**.
11. In the **Description** field, you can provide more information about the contents.
12. From the **Category** drop-down list, select the category to associate with questions.
13. Use the left and right arrows to move questions to the list on the right.
14. Use the up and down arrows to change the order in which the questions or categories appear.
15. **Save** when done.



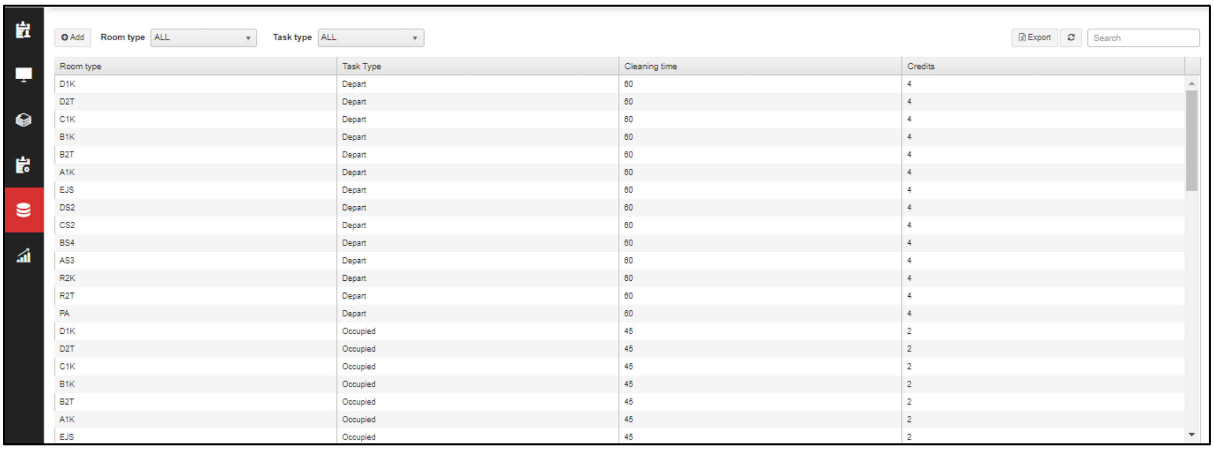
Additional information on creating checklists:

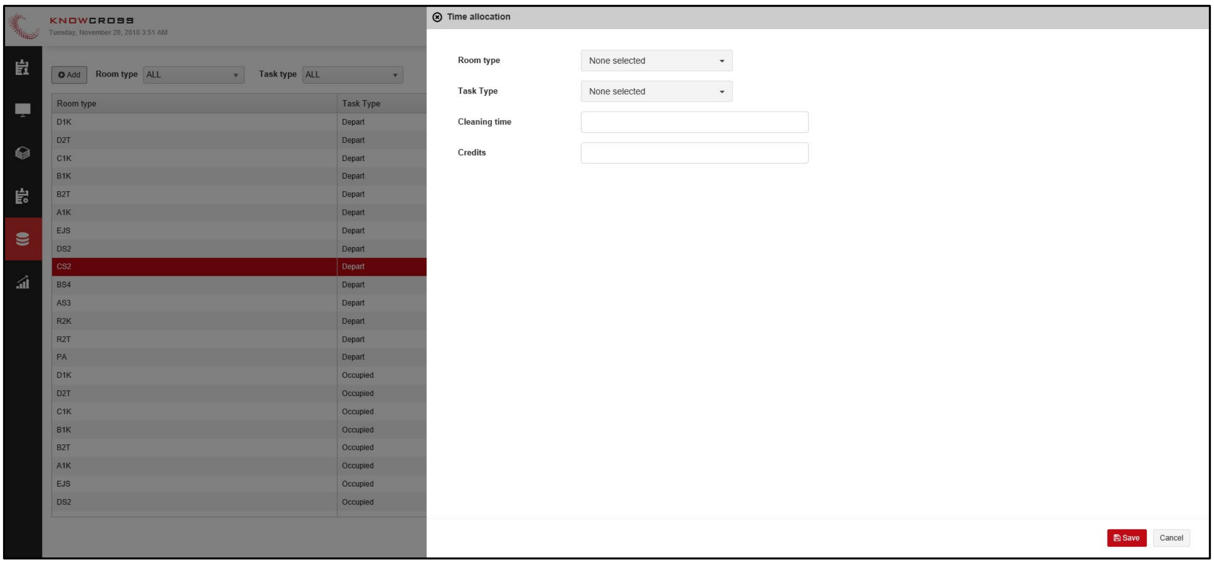
- Every Room + Task Type combination must have a checklist.
- Every Room + Task Type can have its own unique checklist for more precise inspections.
- All checklist questions for the supervisor can be preselected on the App. In application settings, select **Checklist Item Enabled by Default**.

Changing time and credits

All rooms have assigned *time* and *credit* values that impact the task sheet creation process, progress tracker, build in escalation tracker, and awarded credit screens.

The software requires a time or credit to be configured for each room and task type combination. If you need to edit the configuration, go to **Time Allocation** in the **DB Setup**.





Right-click to adjust the time (in minutes) and or credits as required.

Additional information on changing time and credits:

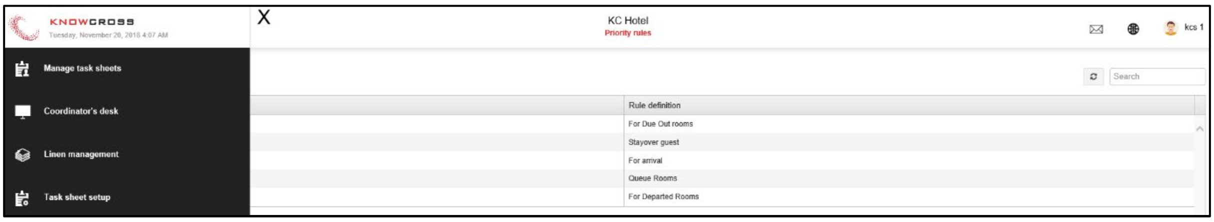
- Every Room + Task Type combination must have an assigned time and credit.
- You can use decimal figures for the credits.
- You can simultaneously apply the same time and credit values to multiple/all rooms and tasks.

Adjusting the cleaning sequence

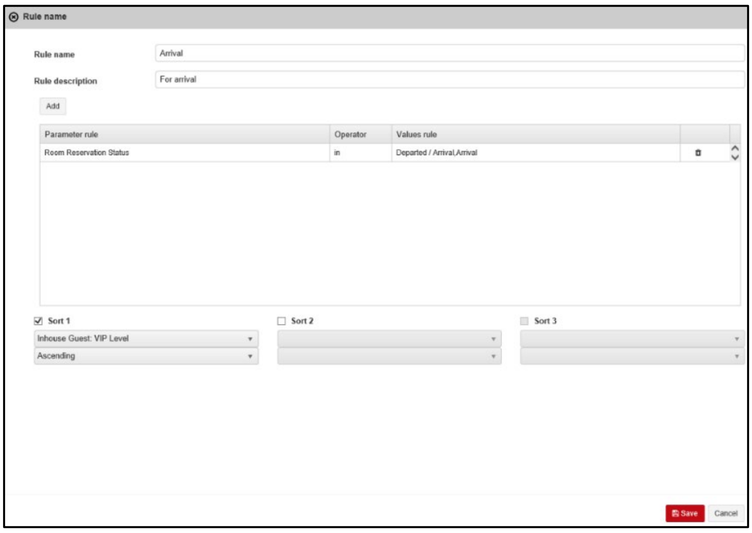
Rooms are automatically prioritized for each task sheet based on a cleaning sequence that is determined by the front office and reservation status in the PMS. Changes in the PMS might affect the order in which rooms appear for a room attendant during the day.

The Cleaning Sequence is built from *priority rules* that are grouped together in a *cleaning sequence*.

Go to **Priority Rules** to see the configured rules.



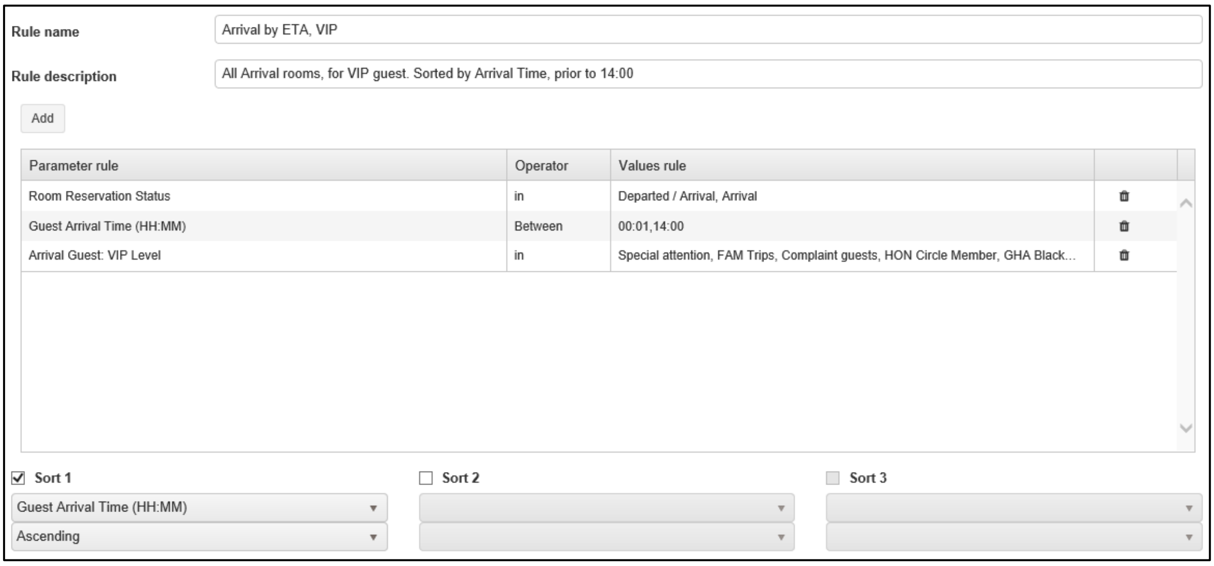
Right-click to view and edit an existing rule or create a new one.



Typically, rules are based on the room reservation status to allow for separation between rooms that are Occupied vs. Vacant and Arrival vs. Due Out. However, you can combine multiple filters.

You can also create a rule only for Rooms that are Vacant+Arrival with an ETA prior to 14:00 and VIP level.

Within a created rule, you can also organize the Rooms by ETA.



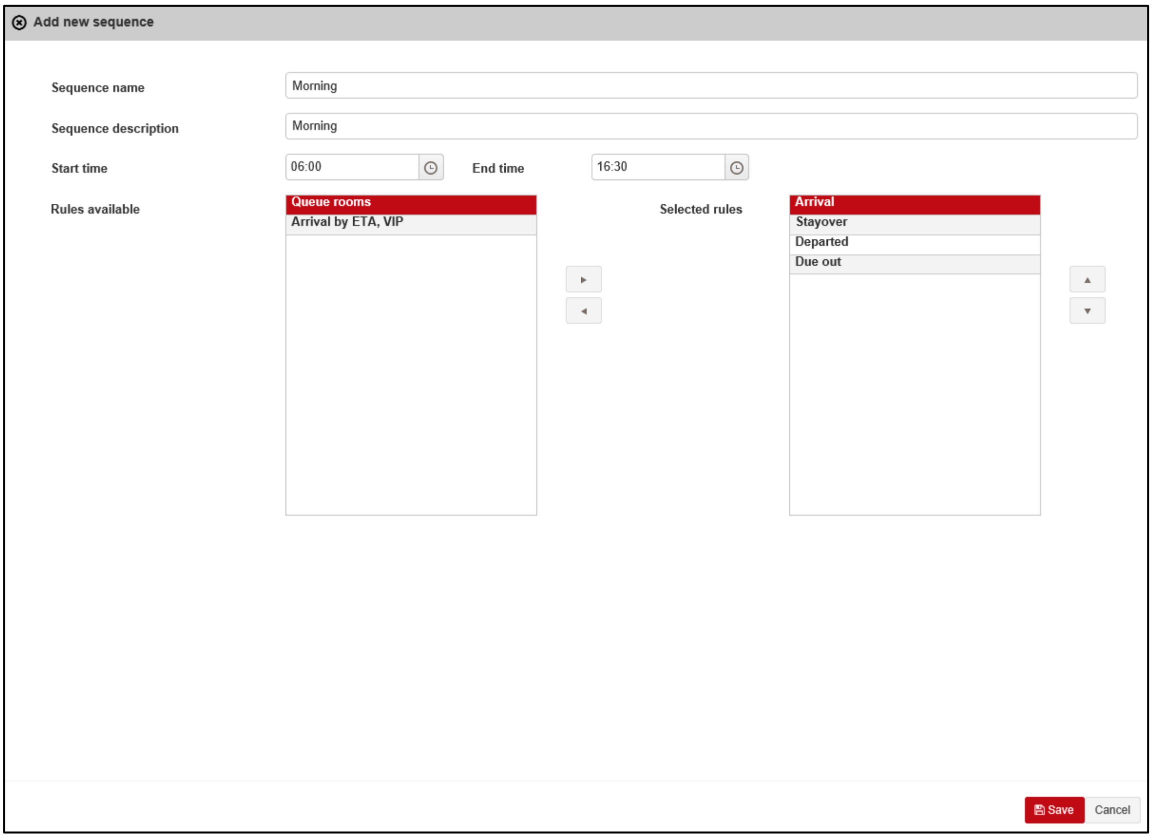
You can create different rules and permutations that allow you to test which rules work best for your operation. Differences between morning and turndown operations are the most common.

When you have created the rules, they are grouped together in a sequence.

Go to the Cleaning Sequence.

In this menu, you can see the configured sequences. Every sequence has a configured start and end time. Task sheets created within these time frames automatically have the relevant sequences applied.

Right-clicking allows you to view and edit the configured sequences.



In the left-hand column, you can see all configured priority rules. The selected rules show you the applicable rules and the order in which they are applied.

Use the arrow buttons to make any required changes and save when done.

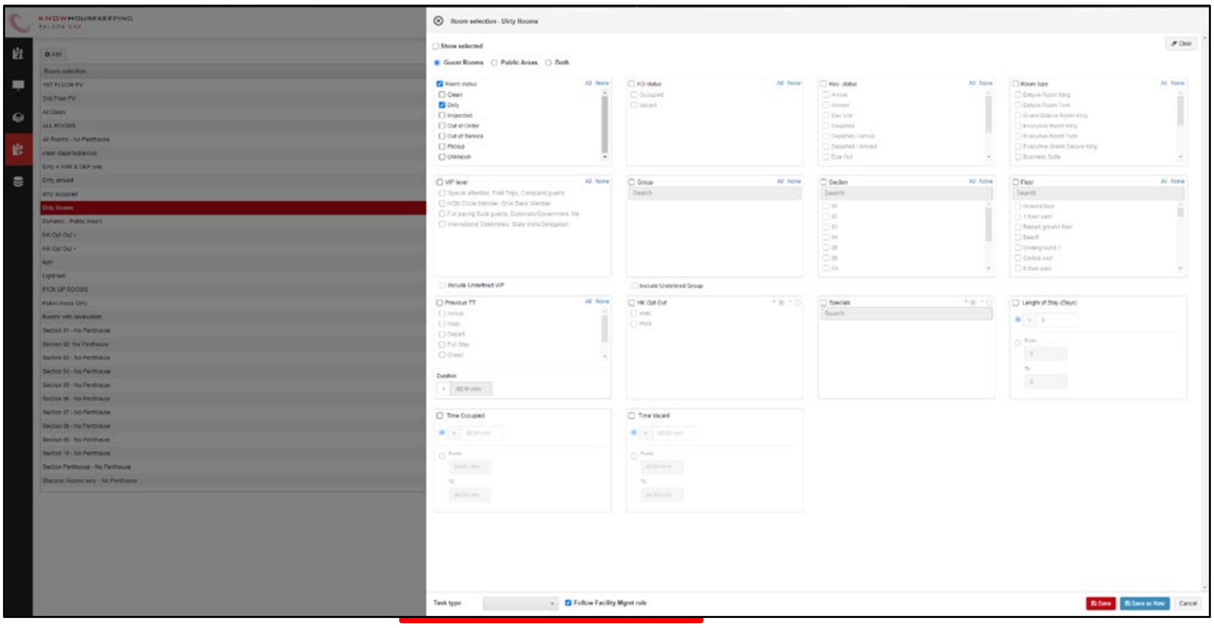
Additional information on adjusting the cleaning sequence:

- The available cleaning sequences must cover 24 hours, which means that if you are operating with only one schedule, the start time is 00:00 and end time is 23:59.
- A sequence requires a minimum of one rule.
- You can create a sequence with a different order of rules that can be manually applied to assist with groups or weekday vs. weekend operations. Set the start time to very early or late.
- If you are using the ETA of guest, without an ETA, that guest will have the fixed time of 00:00 as their ETA. Therefore, in your filters, set a time of > 00:00 to ensure the midnight arrivals are ignored.
- Rooms that are not associated with a rule will be the last in the task list and will be shown in room number or room sequence order.
- The Cleaning Sequence is only a suggestion to the room attendant. An RA can still start a room that is not prioritized as per the configured sequence. If you want to restrict this, allowing an RA only to clean as per the configured rules set within the Application Settings, set the rule *Allow HKA to break cleaning sequence* to NO. (The default is YES to allow for greater flexibility.)

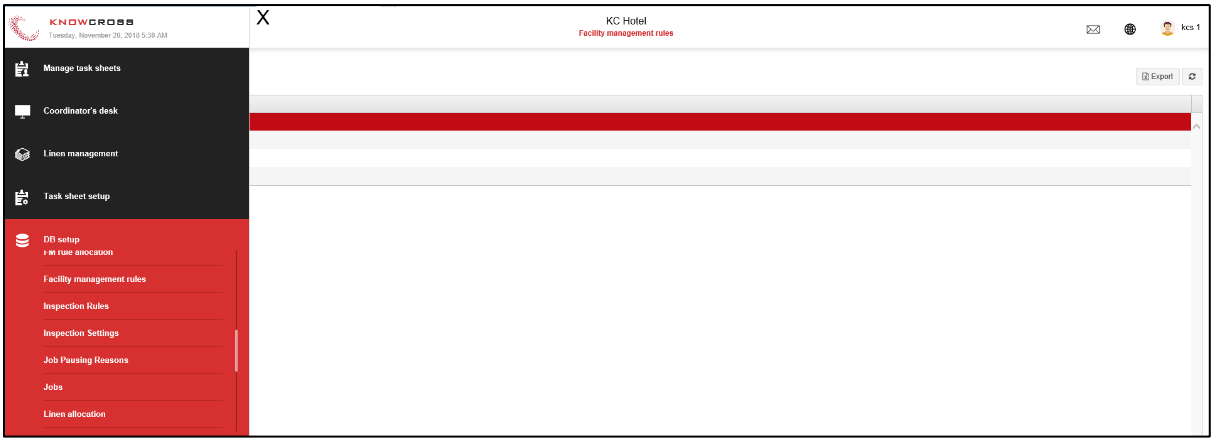
Changing which task types are automatically assigned

When generating task sheets, the task types are automatically generated and assigned to the selected rooms. In most cases, the task types are assigned via the Facility Management (FM) rules. In some cases, task sheets have a default task type assigned.

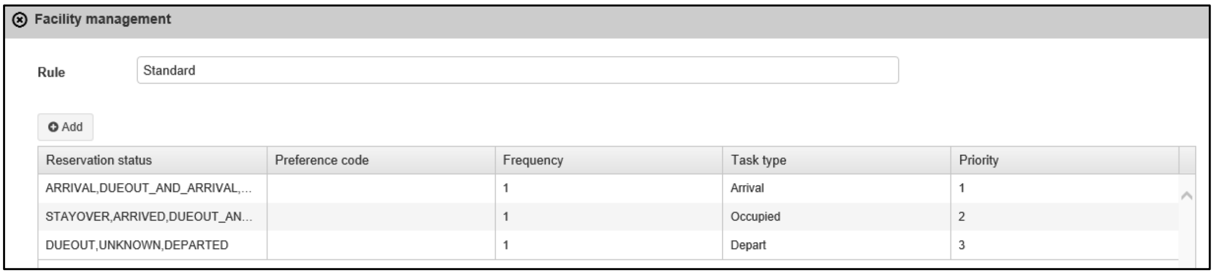
In the **Task Sheet Setup > Room selections** menu, you can see whether FM rules are used or whether a default task type is applied:



To make changes to the FM rules, go to the **Facility Management Rules** menu.



Right-click to edit or add a new rule.



Facility management

Rule: Standard

Add

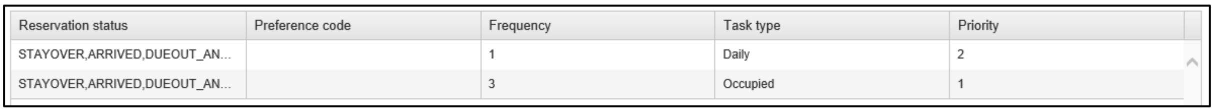
Reservation status	Preference code	Frequency	Task type	Priority
ARRIVAL,DUEOUT_AND_ARRIVAL,...		1	Arrival	1
STAYOVER,ARRIVED,DUEOUT_AN...		1	Occupied	2
DUEOUT,UNKNOWN,DEPARTED		1	Depart	3

Task types are assigned based on the selected fields.

Res Status	Select the reservation statuses.
Room Status	Select the required (Housekeeping) statuses.
Length of Stay (Days)	Select the length of stay, <, >, or =.
Specials	Select the required PMS Specials.
Task Type	Set the applied task type.
Frequency	Set the required frequency, that is, daily or every third day.
Priority	Set the required priority (see below).

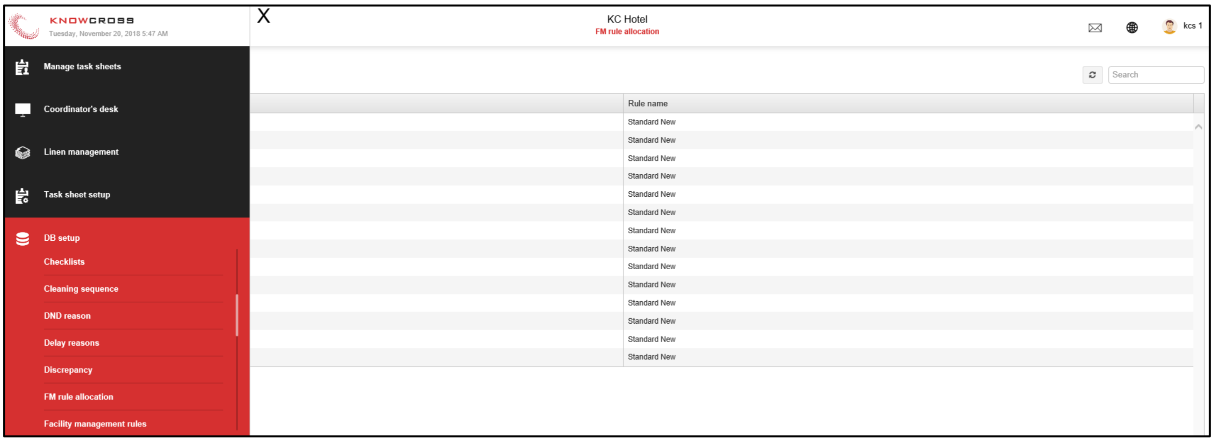
If you have two different task types for the same reservation status, you can use the frequency and priority to alternate between the task types.

Example: Stayovers get daily a *daily* clean for the Daily task type. Stayovers get cleaned every third day for the Occupied task type.



Reservation status	Preference code	Frequency	Task type	Priority
STAYOVER,ARRIVED,DUEOUT_AN...		1	Daily	2
STAYOVER,ARRIVED,DUEOUT_AN...		3	Occupied	1

In the **FM Rule Allocation** menu, you define which rooms should follow which FM rule. You can create different FM rules and differentiate the services offered between, for example, a Suite and a Standard room, where the suite gets a full service daily. Right-click the **Room Type** to change.



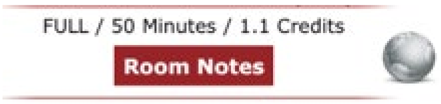
Additional information on changing which task types are automatically assigned:

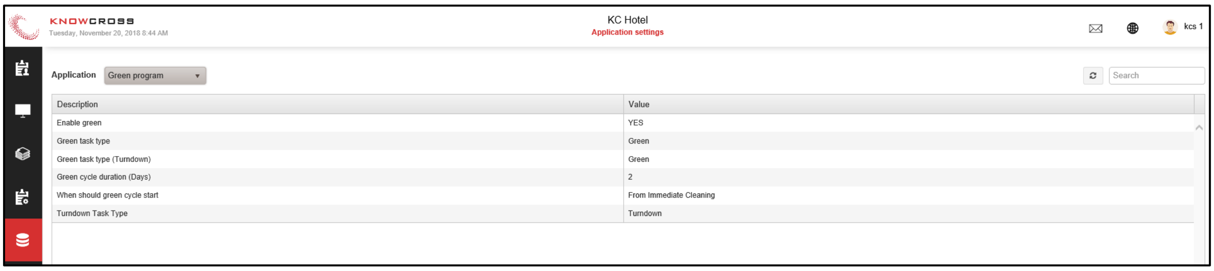
- In Application Settings, *Dynamic Task Allocation* can automatically update the task type of a room if a reservation change occurs. (Due Out changes to Stayover or vice versa.)
- In Application Settings, *Check for back to back reservations* can help identify back-to-back reservations and automatically update the task type to Stayover.
- In Application Settings, *Ignore Preference code in Facility Management Rules* should be set to Yes, and the Preference code field should be left blank unless instructed.
- If you choose no Room Status in the filter, the system will include all by default.

Using the Green program

If the hotel offers guests the option to skip daily service for environmental purposes, the Green program can be used to change the assigned task type. If this feature is enabled, stayover rooms display a globe in the Housekeeping app. A gray globe indicates that the Green program is not activated and that the standard task type is applied. A room attendant can select the globe to activate the Green program for the room. When activated, the globe turns blue and green. The task type also changes. For as long as the Green program is active, an alternative cleaning schedule will be active.

To activate or change this feature, go to the Application settings, and select **Green program** from the drop-down menu.





Enable Green	Enables or disables the program.
Green Task Type	When the Green program is activated, select the new task type.
Green Task Type Turndown	When the Green clean program is active, select the task type be for turndown service.
Green cycle duration (Days)	Specify how many days the Green task type should be applied before reverting to the default task type.
When should Green cycle start	Specify start time and activate date of Green service.
Turndown Task Type	Specify the task type that is configured for Turndown service and therefore replaced by the Green task type (Turndown).

Additional information on using the Green program:

- The task type for the Green program must be configured, including time, credits, and checklists.
- In Application settings, set *Allow to change task type while room is in progress* to Yes, allowing you to activate and change the task type.

Changing reasons in Housekeeping

In the Housekeeping software, there are various places where preconfigured options are displayed. You can change all options from the DB setup when needed. The following fields can be changed in their respective menus:

Attendant Messages	Preconfigured Messages from RA to Supervisor.
DND Reasons	Reasons to confirm a DND.
Delay Reasons	Reasons to confirm a delayed service.
Discrepancy	Available options to report as a discrepancy.
Job Pausing Reasons	Reasons to confirm a pause service.
Lost and Found categories	Categories in which lost and found items must be reported.
OOO/OOS Reasons	Reasons to report an OOO/OOS room.
Jobs	Available Service jobs that can be registered from the software.

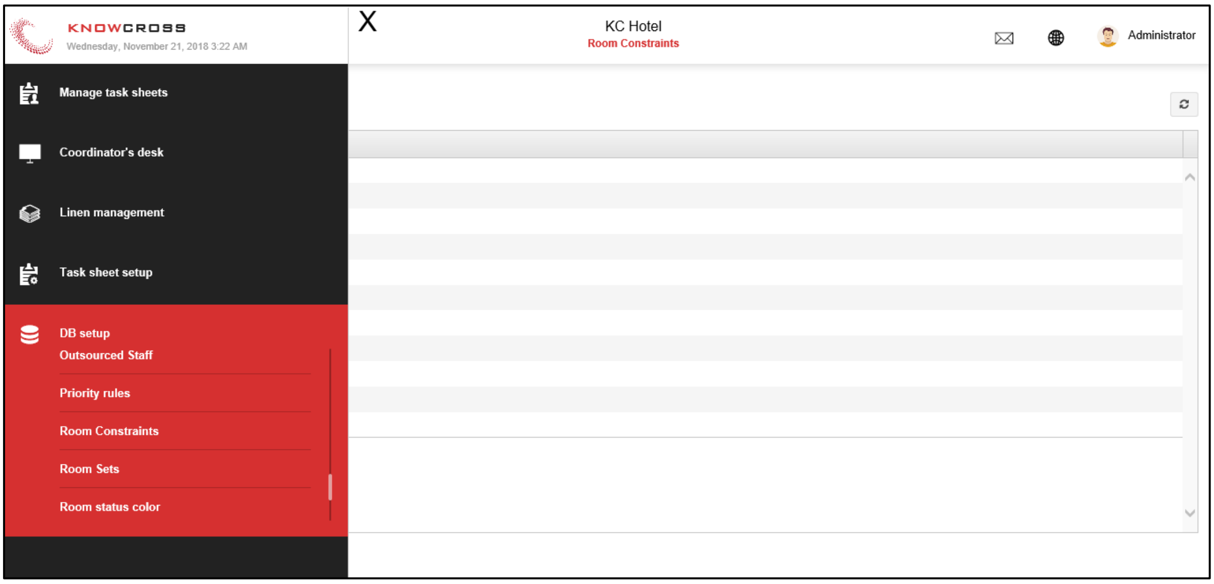
Note: OOO/OOS reasons must match the codes that are available in your PMS.

Using room constraints

When you create task sheets in the Auto Attendant feature, rooms are equally divided based on credit values. Room are assigned either in room number or numerical order. You can use room constraints to control which or what kind of rooms a room attendant receives.

To use room constraints, *room sets* must first be built. These room sets can include one or multiple room constraints. By default, room sets are associated with certain or all room attendants as a *staff constraint*. They can be created ad hoc.

Go to the **Room Constraints** menu.

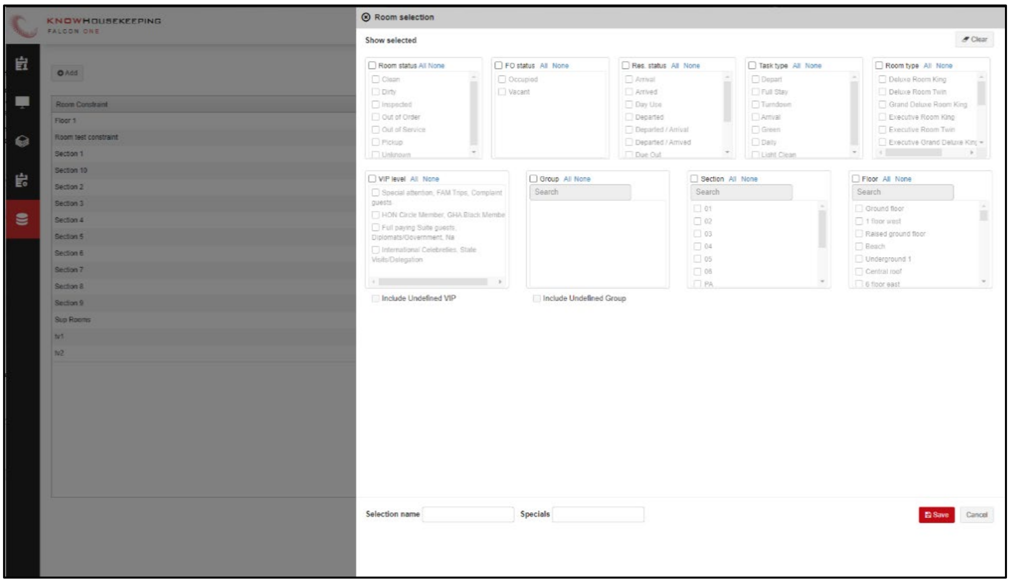


In this menu, you can see the configured constraints. Right-click to edit an existing constraint or select **Add** to create a new one.

The Room Selection window appears. It displays the available filters:

Room Status	Select applicable Housekeeping statuses.
FO Status	Select occupied or vacant rooms.
Reservations Status	Select applicable reservation statuses.
Task Type	Select applicable task types.
Room Type	Select applicable room types.
VIP Level	Select applicable VIP levels.
Include Undefined VIP	Select if not yet configured VIP Codes should be included.

Group	Select applicable group codes / names.
Include Undefined Group	Select if not yet configured group codes should be included.
Section	Select applicable sections.
Floor	Select applicable floors.

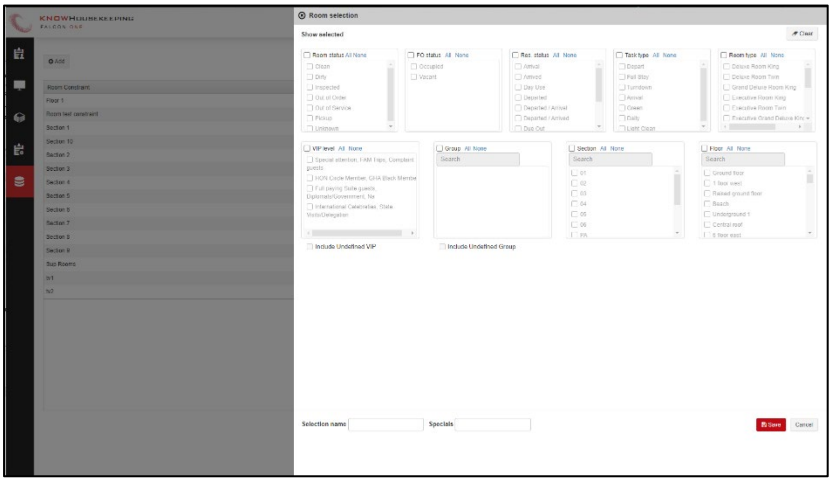


You can use one filter or create a combination of multiple filters.

Example: A new room attendant is allowed to clean deluxe rooms only when the room is stayover. In the **Room Type** field, select the appropriate room types. In the **Res Status** field, select the relevant reservation statuses. Name the room selection and save it.

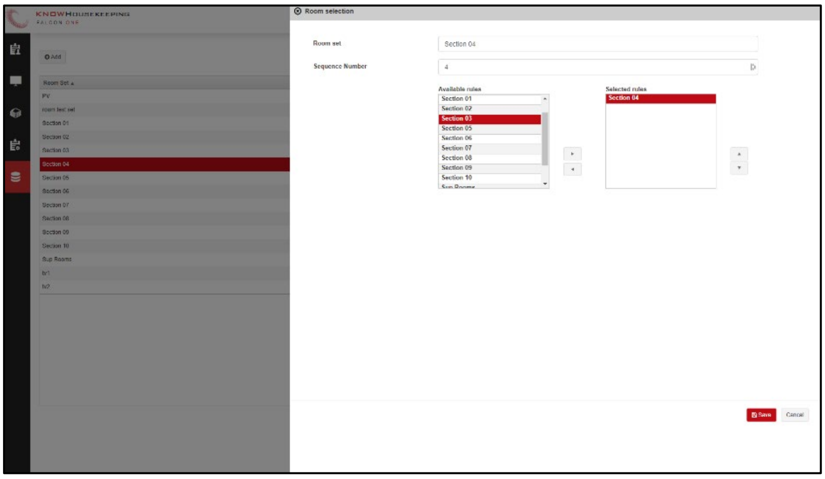
Common room selections could also be based on sections or floors if your property works with fixed sections or floors.

Next, go to the **Room Sets** menu.



In this menu, you can create a room set that consists of one or multiple constraints.

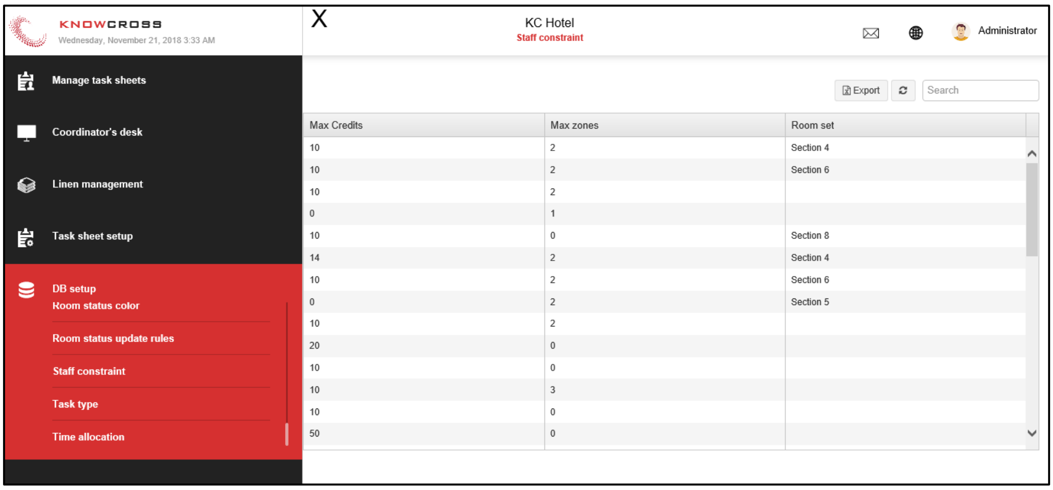
Right-click to edit or add a new constraint.



Use the left and right arrows to move available constraints to the Selected rules and the up and down arrows to set the priority.

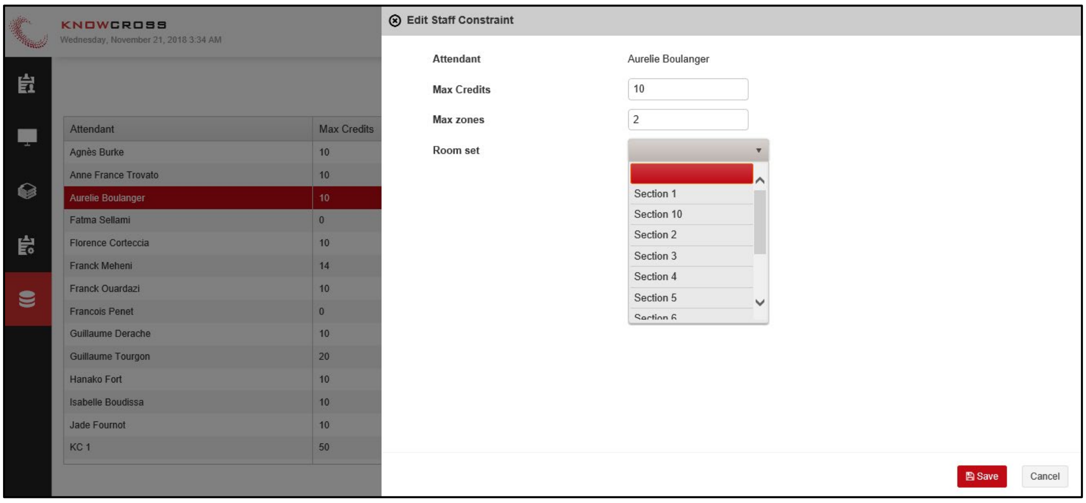
For example, you can create a room set for each individual section, allowing the assignment of a room attendant to their own sections (high occupancy) and creating a set of all sections on one floor for low occupancy.

Next, go to **Staff Constraint**.



In this screen, you find all configured room attendants. You can set the limit of credits that a room attendant can receive when using Auto Attendant, the maximum number of floors, and which room set is applicable.

Right-click to **Edit** the room attendant.



Set the **Max Credits** and **Max Zones** (floors). From the drop-down list, select the default constraint.

If you want to remove a configured constraint, select the first entry (highlighted in red).

Save when done. This is the default constraint for the room attendant. When you are creating the task sheets, the selected rooms will now be assigned based on the configured applied constraints.

Additional information on using room constraints:

- If you are using room constraints, you increase the chance that the software will not be able to assign all rooms. Rooms that cannot be assigned (due to the applied constraints) will be placed in an extra task sheet in the task sheet editor. This is an automatic process. These rooms can be moved manually. The more constraints in use, the higher the chance this happens.
- When selecting Room Attendants as part of the task sheet creation process in the Task Sheet Editor, you can make daily changes to the constraints if needed.
- Within the application settings, ensure that if you are using Max Credits and Max Zones, the respective rules are set to YES: *Honor max credits* and *Honor max zones*.

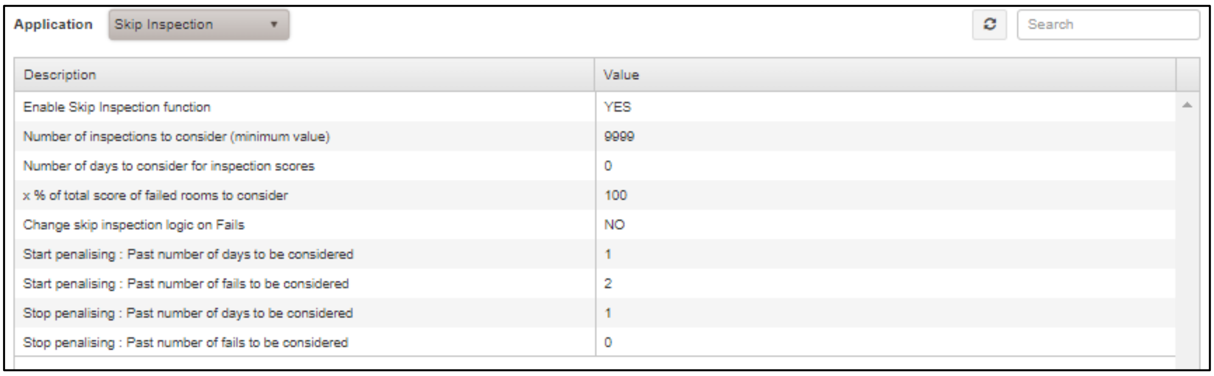
Configuring Skip Inspection

Skip Inspection is a feature that allows you to automatically skip the inspection process that is normally completed manually by a housekeeping supervisor on the Housekeeping mobile application. When cleaning has been completed, it changes a room to the *Inspected* status without a supervisor having to manually complete this task.

Skip Inspection is optimal when certain room tasks do not require inspecting or when you want to reduce the volume of tasks to inspect for room attendants based upon historic inspection scores.

Tasks that are part of the Skip Inspection configuration will not appear in the *pending inspection* status and move directly to *inspection completed* on the mobile app.

In the **App Settings**, select the **Skip Inspection** settings in the filter:


Application: Skip Inspection | Search

Description	Value
Enable Skip Inspection function	YES
Number of inspections to consider (minimum value)	9999
Number of days to consider for inspection scores	0
x % of total score of failed rooms to consider	100
Change skip inspection logic on Fails	NO
Start penalising : Past number of days to be considered	1
Start penalising : Past number of fails to be considered	2
Stop penalising : Past number of days to be considered	1
Stop penalising : Past number of fails to be considered	0

The below settings include all the tasks that must be skipped.

Enable Skip Inspection Function	Set to YES.
Number of Inspections to consider	Number of completed inspections that should be checked before penalties apply.
Number of days to consider inspection scores	Number of days of inspections that should be checked before penalties apply.
x % of total score of failed rooms to consider	% of failed inspections that should be considered.
Change skip inspection logic on Fails	Set to YES if failures should change the logic.
Start penalizing: Past number of days to be considered	Enter a max date range in number of days.
Start penalizing: Past number of fails to be considered	Enter a max number of fails.
Stop penalizing: Past number of days to be considered	Enter a max date range in number of days.
Stop penalizing: Past number of fails to be considered	Enter a max number of fails.

Change the menu in the **DB Settings** to **Inspection Rules**.

In the inspection rules, for each task and room type, you configure which rooms should be used in the Skip Inspection program.

The Inspection rules dictate which room and task should be manually inspected; therefore, select **Always Exclude** for the combination for which to skip inspection.

Task Type	Room Type	
Strip	ALL	Always exclude
C/O	ALL	Always include
Check	ALL	Always include
S/O	ALL	Always include
S/O (L)	ALL	Always include
T&T	ALL	Always include

Ensure that you cover all task types and room type combinations.

Change the menu in the DB settings to **Inspection Settings**.

In the **Percentage Inspections To Pickup** column, you configure how many rooms should have the inspection skipped based on the room and task combination. In the image below, all completed tasks have their inspection skipped.

Add   Search

From Score(%)	To Score(%)	Percentage Inspections To Pickup
0	100	100

You can create more rules. For example, if you want to reward high performers, you could configure as follows:

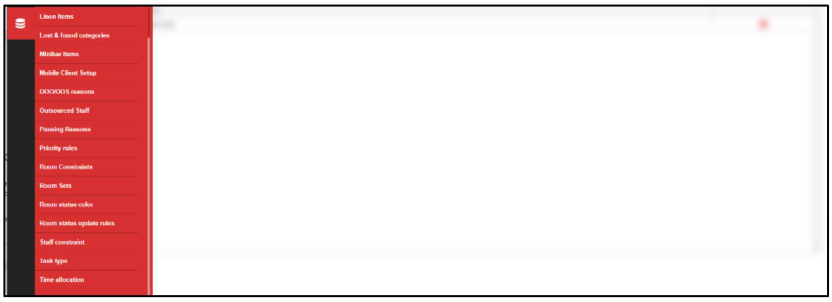
From Score (%)	To Score (%)	Percentage inspections to pick up
95	100	75%
80	95	50%
0	80	0%

Based on the inspection scores, these configuration would ensure that if a room attendant is rated for the configured task and room type combination below 80%, all rooms must be inspected. If the scores are between 80% and 95%, half of the rooms must be inspected. If the scores are 95% and above, only 25% should be inspected. These configurations reduce the need to inspect high-performing attendants or easy tasks.

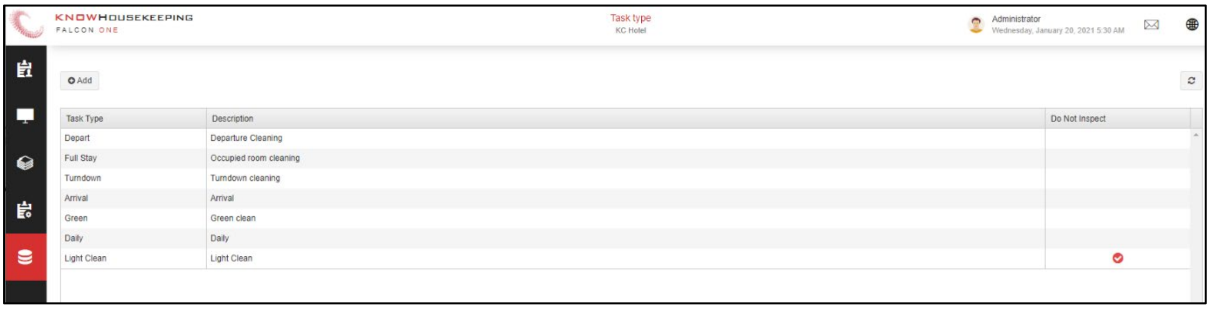
Configuring Do Not Inspect

While Skip Inspection can be used to reduce the number of tasks to inspect, Do Not Inspect is designed to completely remove some tasks from the inspection process. These tasks are placed in the Supervisor app in the *Completed* status.

In the **DB Menu**, go to **Task Type**.



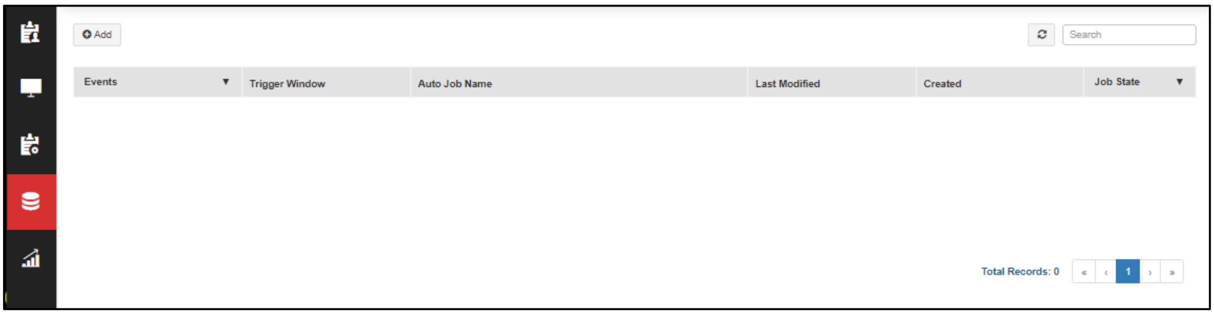
This screen displays configured task types. To set a task type as Do Not Inspect, right-click the desired task type to edit. Select the checkbox to activate **Do Not Inspect**. Task types with the Do Not Inspect rule applied are displayed with a red checkmark in the table, as shown below.



Automating Service job creation in Housekeeping

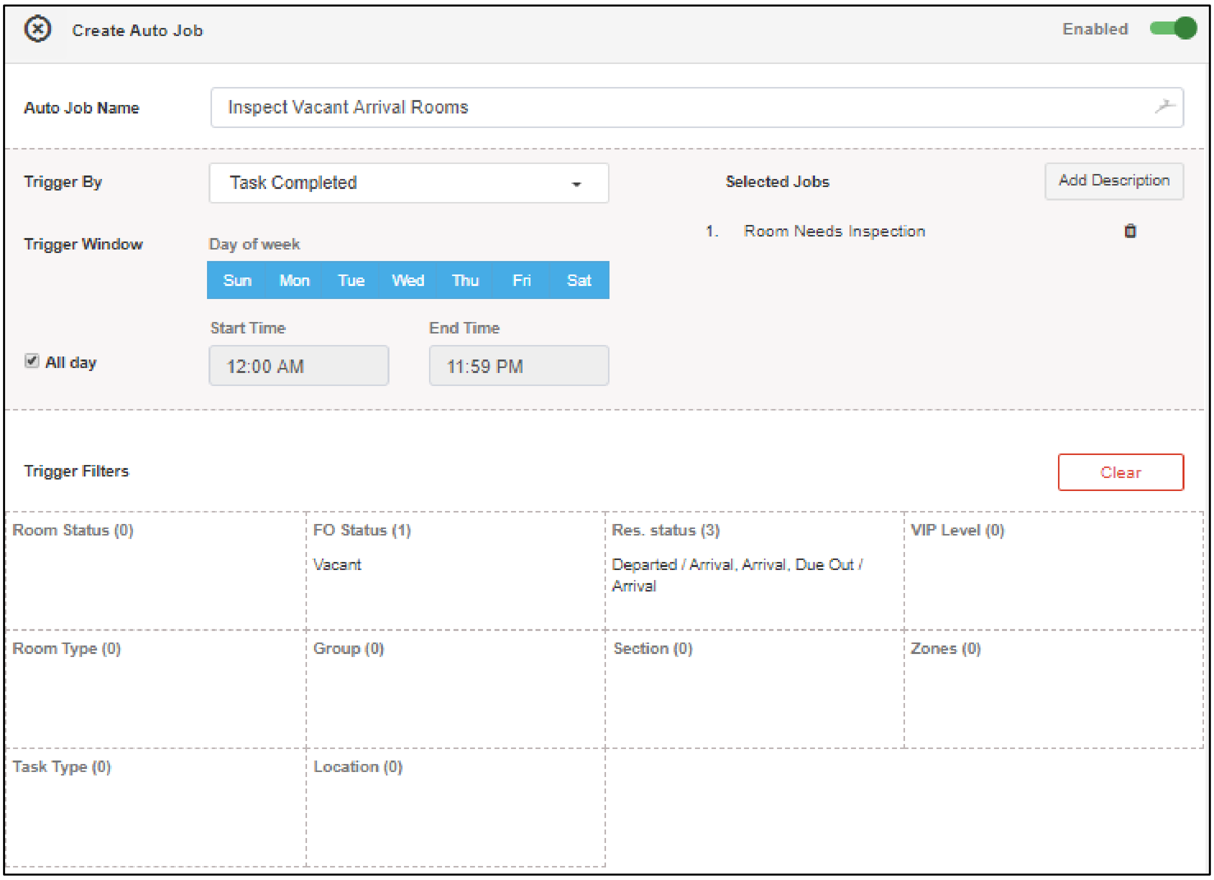
This feature allows you to automatically create jobs in Service based on actions completed in Housekeeping. For example, when a room is cleaned and ready for inspection, the job can automatically be sent to a supervisor.

In the **DB Menu**, go to **Auto Job**.



Select **Add** to start the configuration of the auto job.

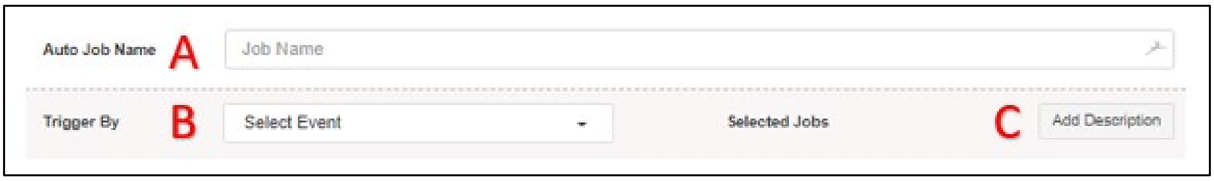
The Auto Job wizard, as shown below, has many options for defining requirements.



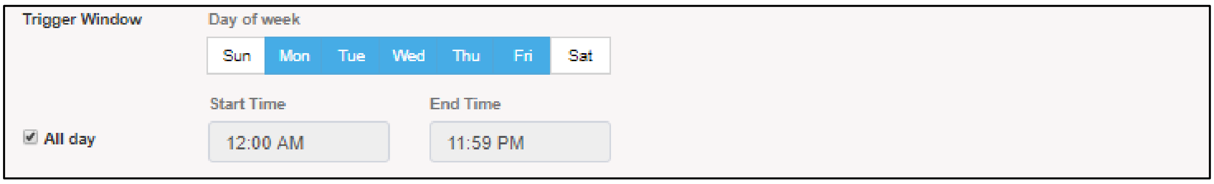
Define the name of the **auto job** with which to start. (A)

In the **Trigger By** drop-down list, you'll find various events within the Housekeeping software such as Task Cleaned and Lost and Found Reported. (B)

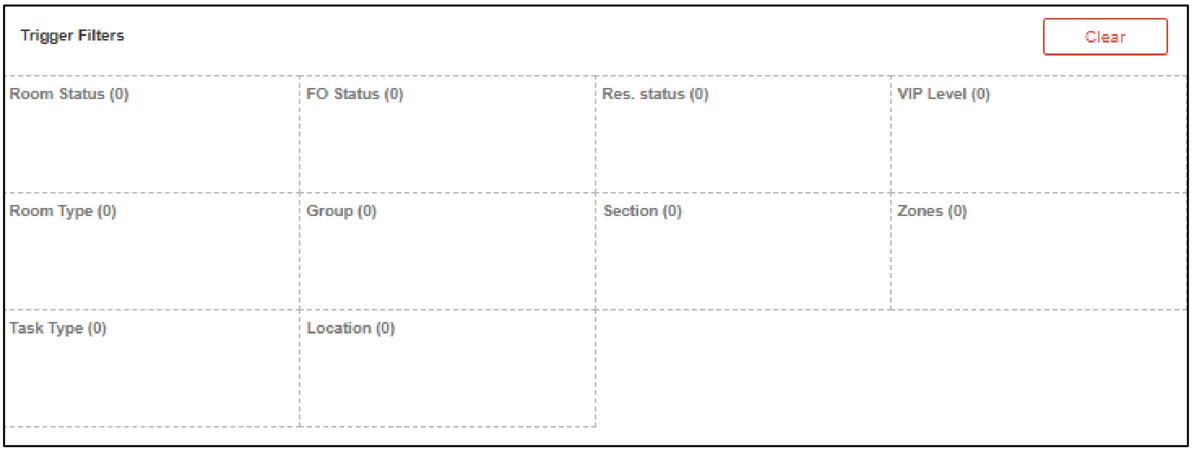
Next, select the **Job** that must be created in Service by selecting **Add Description**. (C) By using **Shortlist**, you can add multiple jobs.



In the **Trigger Window**, you can set restrictions on when this auto job should be created. Select the days to which restrictions should apply. Selected days turn blue. The time of day can be left as **All Day**, or you can apply restrictions.



In the **Trigger Filters**, you can apply additional filters for when the auto jobs should apply. Available filters include FO Status, Reservation Status, and Task Type. You can use a combination of multiple filters.



Select **Submit** to activate the auto job.

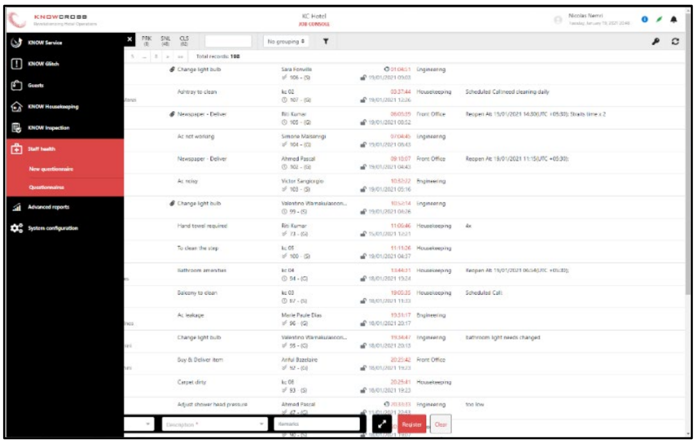
Addition information on automating Service job creation:

- A licensed Service module is needed for this feature.
- Service does not allow the creation of duplicate jobs.

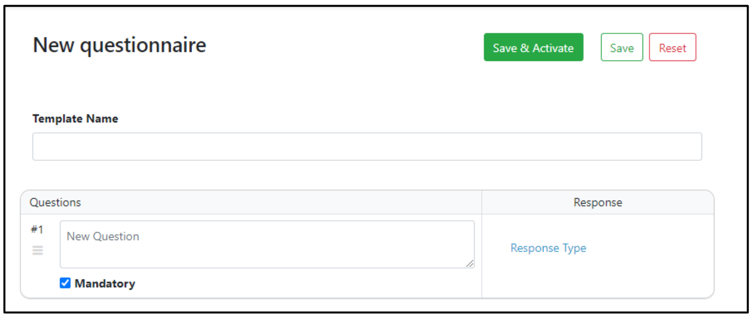
Creating a health assessment

This feature prompts a Housekeeping mobile app user to answer a set of questions before being able to access other application functionality.

While this feature is part of the Housekeeping application, the setup is managed in the Staff Health menu (available at login.knowcross.com).



Select **New Questionnaire** to configure a new set of questions.



Name the questionnaire template and go to the question box to update the first question.

Questions can have a variation of required responses:

Text	A free-type text box
Numerical	Set the Measurement Unit and a Min and Max value. Any answer given outside the Min and Max range count as failed.
Binary	A Yes / No button. The Yes / No text can be configured as per requirement. The Pass rating can be selected as per requirement.
Radio	Multiple statements / questions. A user can select only one option. The Pass statement can be selected as per requirement.
Checkbox	Multiple statements / questions. A user can select multiple checkboxes. The Pass Checkbox(es) can be selected as per requirement.
Rating	Rating of five different options / values. The Pass rating can be selected as per requirement.

You can set some or all questions as mandatory by selecting the relevant checkbox. After configuration, select the **Activate** button to enable the health assessment.

Existing Questionnaires cannot be changed or deleted. You can clone an existing questionnaire and create a new version of the same should changes be needed.

Additional information on creating a health assessment:

- User rights must be granted to access the configuration. This can be done in the standard user module roles. Enable **Staff Health**.
- In the Housekeeping application settings, the setting **Enable Staff Health for HK** must be set to **YES** for this to appear. If set to NO, you can still configure the assessment, but it will not appear.

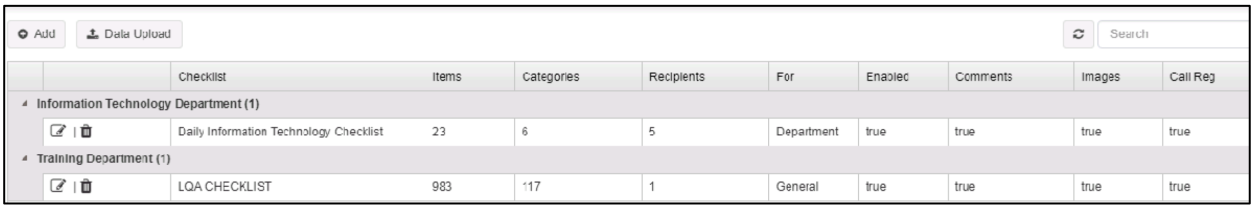
Inspection configuration

Creating a new checklist (manual)

To set up a new checklist:

1. Select the checklist option ( ) from the left pane.

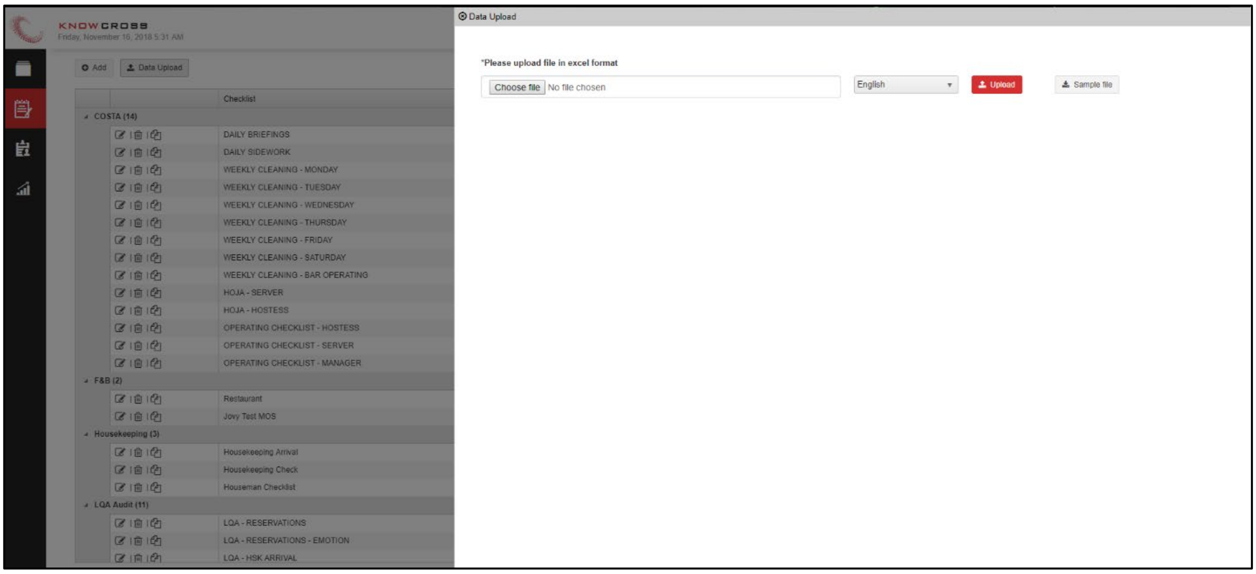
   The Configure Checklists screen appears.



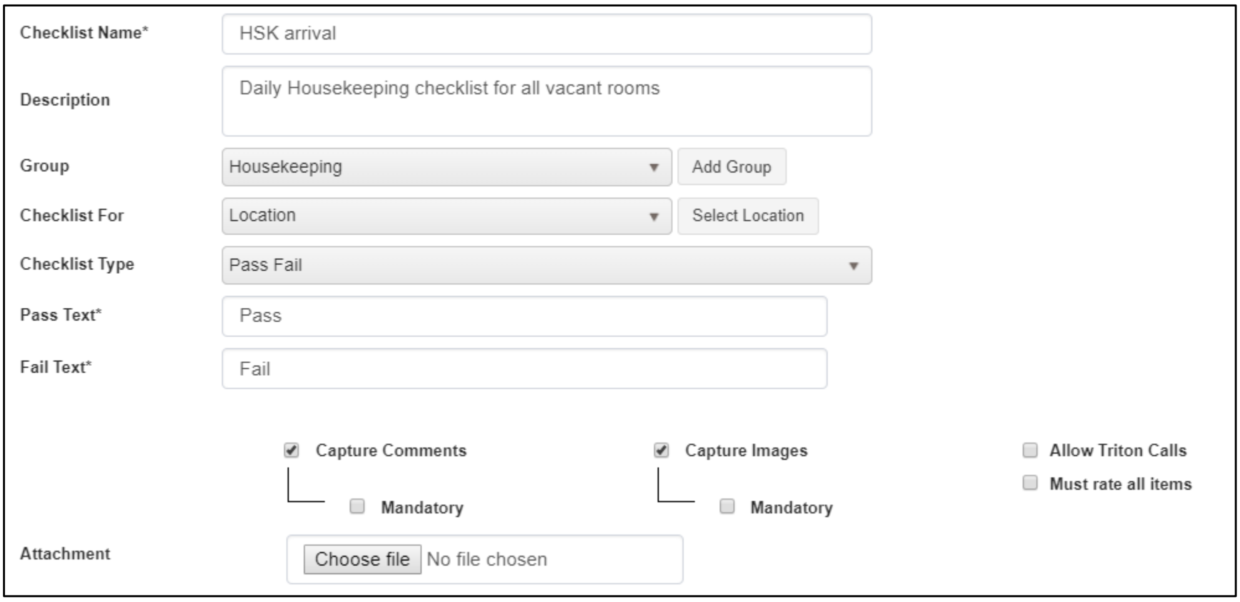
	Checklist	Items	Categories	Recipients	For	Enabled	Comments	Images	Call Req
Information Technology Department (1)									
	Daily Information Technology Checklist	23	6	5	Department	true	true	true	true
Training Department (1)									
	LQA CHECKLIST	983	117	1	General	true	true	true	true

   The software displays checklists under various groups.

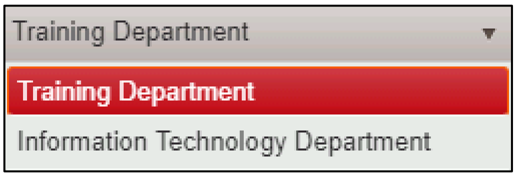
2. To create a new checklist, select **Data Upload** to upload an Excel sheet. (From the Data Upload screen, you can also download a sample file.)



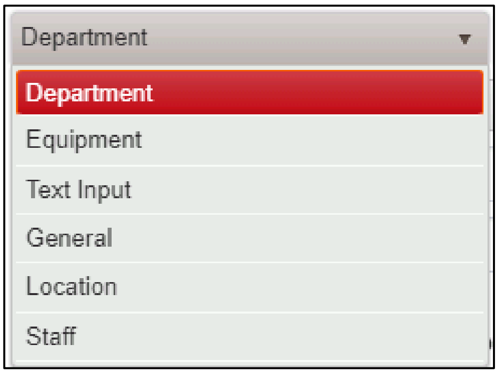
3. Select **Add** and complete the fields shown in the image below.



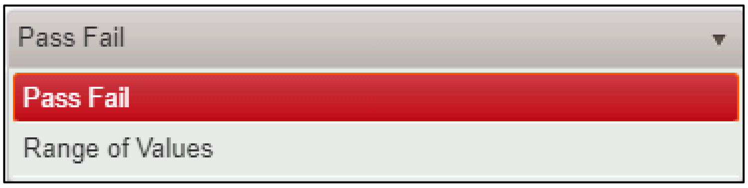
Checklist Name: Enter a name for the checklist.
Description: Enter the description or purpose of the checklist.
Group: Similar checklists can be grouped together, regardless of the department. Users can be granted access to one or multiple groups.



Checklist For: Checklists can be either generic or based on locations, departments, or staff. When a checklist is based on location, you can select which locations apply.



Checklist Type: Make your checklist either a *Pass Fail* or *Assign a range of values*.



Checkboxes: Select checkboxes to enable actions or to make actions mandatory.

Select **Next** to go to the next step.

Categories are the contents of the checklist based on which inspections will be conducted.

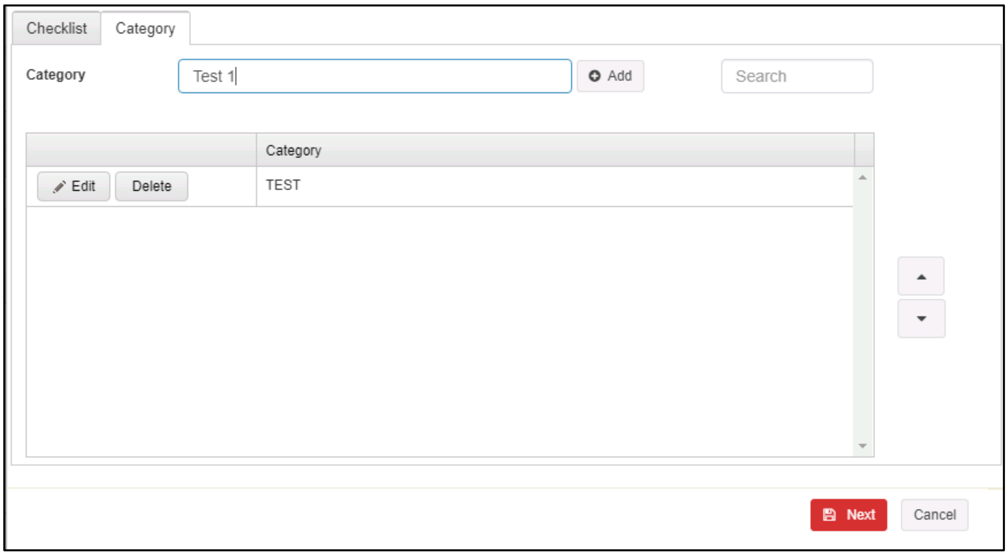
Category: A common area or a header, under which check points can be established.

Examples: Vanity Counter, Bed Side Area, Suite Inspection, Staff Grooming etc.

Item(s): These are checkpoints that are defined *within a category*. Example: 02 Hand towels in place, Bed Side mat Placed, Clean carpets, Fire Exits accessible and not blocked.

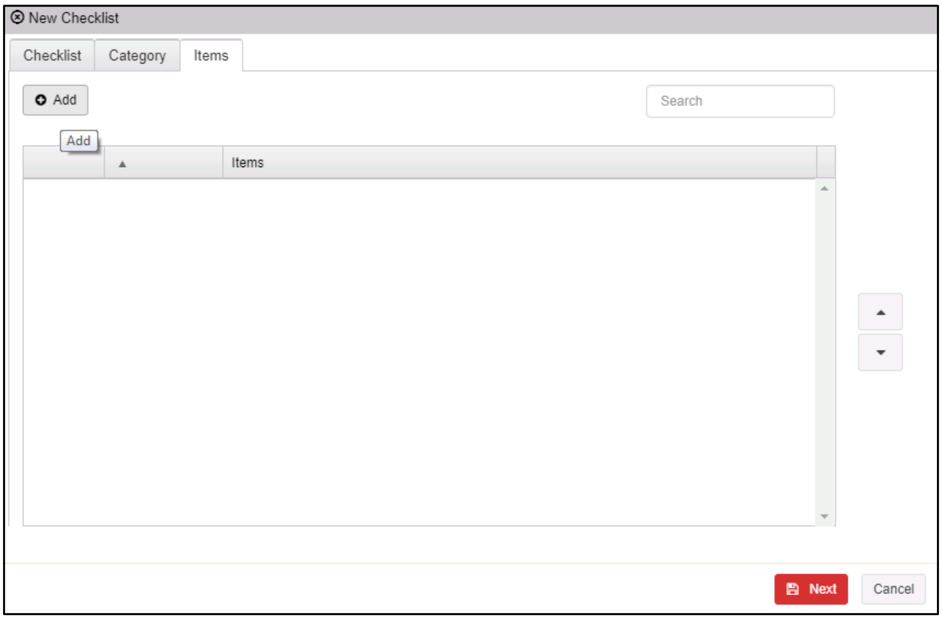
4. In the **Category** tab, select the **Category** field.
5. Type the category name and select **Add**.

6. Add multiple categories and move them up or down as required using the arrow buttons on the right.



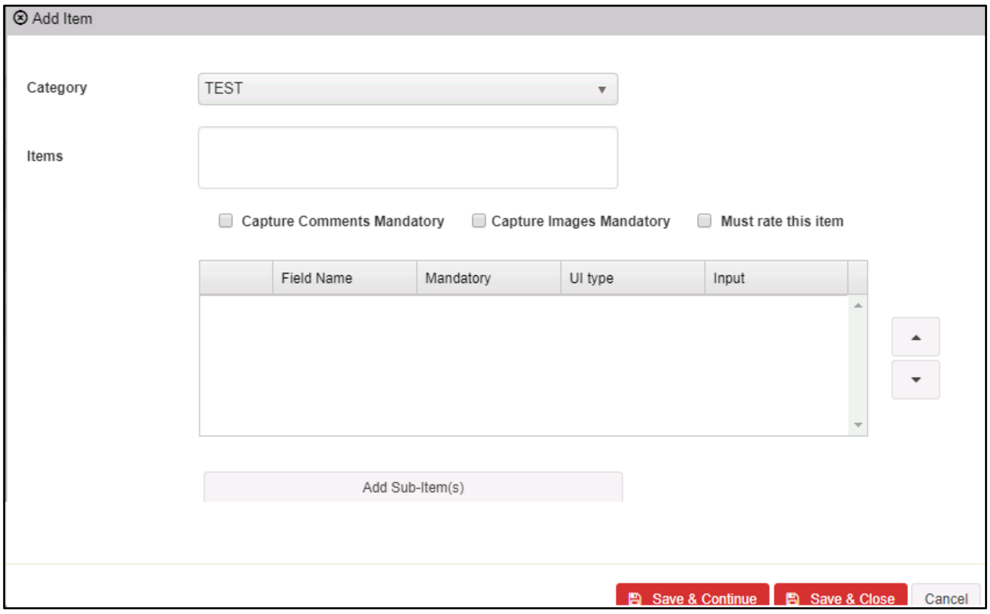
7. Select **Next**.

   The Items tab appears.

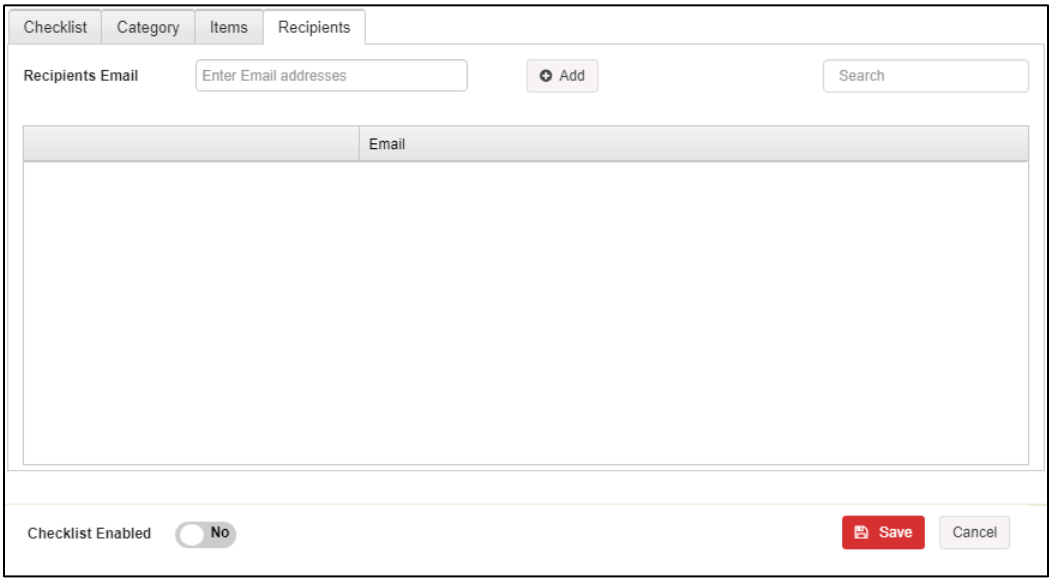


8. Select the **Add** button for the software to display a new screen for adding more details of an item.
9. Select relevant category of item from the drop-down menu.
10. Type the item description in **Items** field.
11. Select the checkboxes as necessary to make the relevant action mandatory.
12. You can also configure additional **Sub Check points** for the same item.

13. Select **Save and Continue** to add more items.



14. Select **Next** to go to the next step.
15. After completing an inspection from a smart device, a report can be sent to recipients. Their email addresses are defined here. Select the **Recipients** tab.



16. Enter the email address(es) of the staff members and add. You can add multiple IDs as required.

> **Note:** Use email groups whenever possible.

17. Switch **Checklist Enabled** to **Yes** to enable the checklist.
18. Select **Save**.

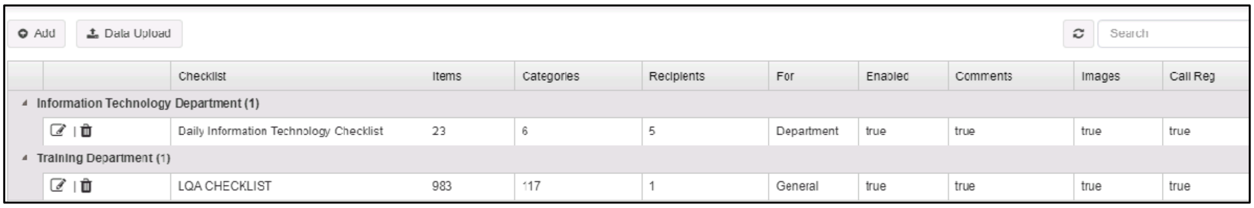
    Automatic email reports will be sent to these IDs after the checklist is submitted.

Create a new checklist (upload)

To upload a new checklist:

1. Select the checklist option ( ) from the left pane.

The Configure Checklists screen appears.

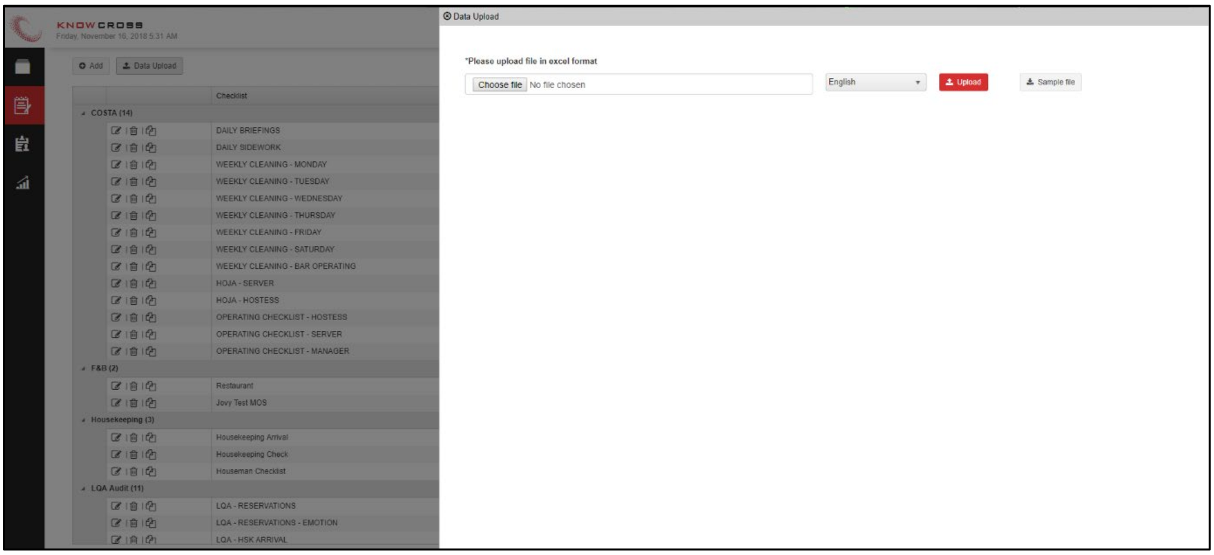


Add | Data Upload | Search

	Checklist	Items	Categories	Recipients	For	Enabled	Comments	Images	Call Req
Information Technology Department (1)									
	Daily Information Technology Checklist	23	6	5	Department	true	true	true	true
Training Department (1)									
	LQA CHECKLIST	983	117	1	General	true	true	true	true

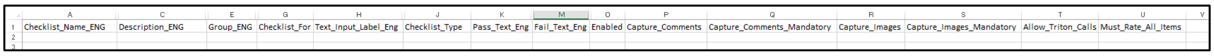
The software displays checklists under various groups.

2. Select **Data upload** to upload an excel sheet.
3. Download the sample file to obtain the Excel format for the upload.



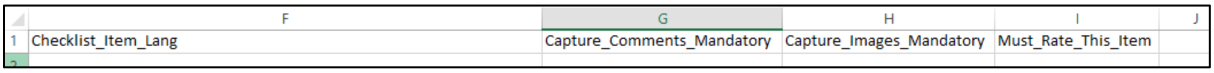
This Excel workbook includes three worksheets.

Checklist—This sheet contains the header information, such as checklist name, group, and type.



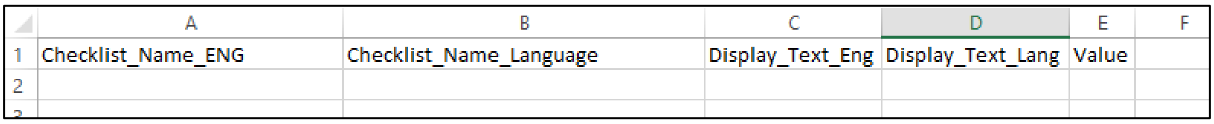
	A	C	E	G	H	J	K	M	O	P	Q	R	S	T	U	V
1	Checklist_Name_ENG	Description_ENG	Group_ENG	Checklist_For	Text_Input_Label_Eng	Checklist_Type	Pass_Text_Eng	Fail_Text_Eng	Enabled	Capture_Comments	Capture_Comments_Mandatory	Capture_Images	Capture_Images_Mandatory	Allow_Triton_Calls	Must_Rate_All_Items	
2																

Items—This sheet contains all questions in the checklist, including their respective categories.



	F	G	H	I	J
1	Checklist_Item_Lang	Capture_Comments_Mandatory	Capture_Images_Mandatory	Must_Rate_This_Item	

Range of Values—This sheet contains the display text, which appears when using a score-based checklist instead of a pass/fail list.



	A	B	C	D	E	F
1	Checklist_Name_ENG	Checklist_Name_Language	Display_Text_Eng	Display_Text_Lang	Value	
2						

All fields are listed below:

S NO.	Sheet Name	Field Name	Description
1	Checklist	Checklist_Name_ENG	Name of the checklist (preferably a code).
2	Checklist	Checklist_Name_Language	Name of the checklist in the second language.
3	Checklist	Description_ENG	Detailed description of the point 1/ checklist.
4	Checklist	Description_Lang	Detailed description in a different language.

S NO.	Sheet Name	Field Name	Description
5	Checklist	Group_ENG	Name of the group that will access the checklist. (You can define the users in the group later.)
6	Checklist	Group_Lang	Name of the group in a different language.
7	Checklist	Checklist_For	Type. For example, is it for locations, departments, and so on. You can choose only one of the below entries to populate in this field: DEPARTMENT EQUIPMENT FREE_TEXT GENERAL LOCATION Copy one of the entries and paste it in the cell.
8	Checklist	Select Location	You can select locations only once the data has been imported.
9	Checklist	Text_Input_Label_Eng	Optional text displayed when General is applied.
10	Checklist	Text_Input_Label_Lang	Optional text displayed when General is applied in a different language.
11	Checklist	Checklist_Type	Define the scoring method. You can select one of the of two options: PASS_FAIL RANGE_OF_VALUES
12	Checklist	Pass_Text_Eng	This must be the **Pass_Eng**.
13	Checklist	Pass_Text_Lang	Type "Pass" in a different language.
14	Checklist	Fail_Text_Eng	This must be the **Pass_Eng**.
15	Checklist	Fail_Text_Lang	Type "Fail" in a different language.
16	Checklist	Enabled	This must be enabled for the checklist to function.
17	Checklist	Capture_Comments	Choose either Y or N.
18	Checklist	Capture_Comments_Mandatory	Choose either Y or N.
19	Checklist	Capture_Images	Choose either Y or N.
20	Checklist	Capture_Images_Mandatory	Choose either Y or N.
21	Checklist	Allow_Triton_Calls	Choose either Y or N.
22	Checklist	Must_Rate_All_Items	Choose either Y or N.N
23	Items	Checklist_Name_ENG	Must be exactly same as point 1.
24	Items	Checklist_Name_Language	Same as point 2.
25	Items	Checklist_Category_ENG	Category as provided by the client.
26	Items	Checklist_Category_Lang	Category in a different language.
27	Items	Checklist_Item_ENG	Enter the checklist item.

S NO.	Sheet Name	Field Name	Description
28	Items	Checklist_Item_Lang	Enter the checklist in a different name.
29	Items	Capture_Comments_Mandatory	Either Y or N.
30	Items	Capture_Images_Mandatory	Either Y or N.
31	Items	Must_Rate_This_Item	Either Y or N.
32	Range of Values	Checklist_Name_ENG	Same as point 1 (if the range of value is selected in the checklist type).
33	Range of Values	Checklist_Name_Language	Same as point 2.
34	Range of Values	Display_Text_Eng	Name of the scoring field.
35	Range of Values	Display_Text_Lang	Name of the scoring field in the second language.
36	Range of Values	Value	Value that you want the field to have.

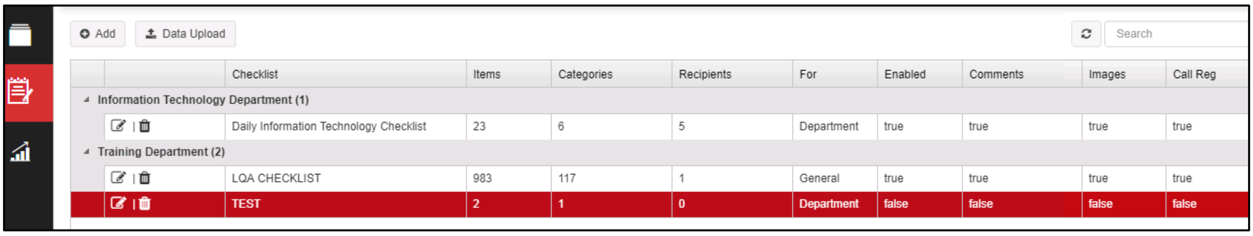
Additional information on uploaded checklists:

- You can load multiple checklists in one document.
- New groups will be created if the upload document does not match existing groups.
- After the upload, you can add email IDs for the automatic email alerts.

Editing existing checklists

Checklists can be edited to remove or add more items, categories, or to simply add an email address of a recipient.

In the menu pane on the left, select **Configure Checklists**. All preconfigured checklists are displayed.



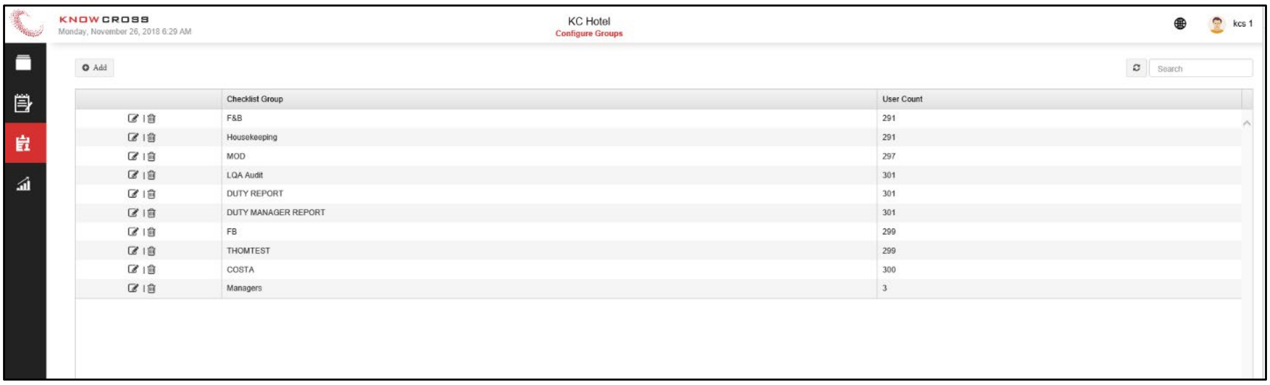
Select the **Edit/Delete** button ( ) for the checklist that you want to edit/delete.

> **Note:** Checklist that are in use or have a history cannot be edited. Either delete all existing histories or create a copy of the checklist and create a new one.

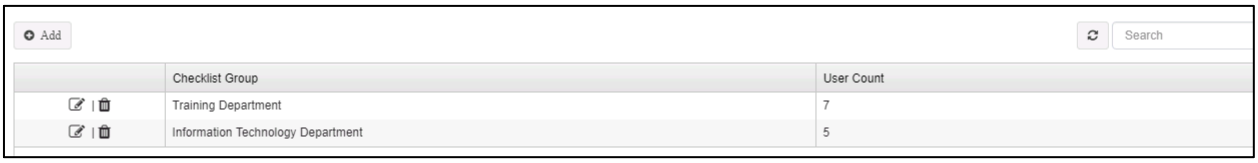
Configuring groups

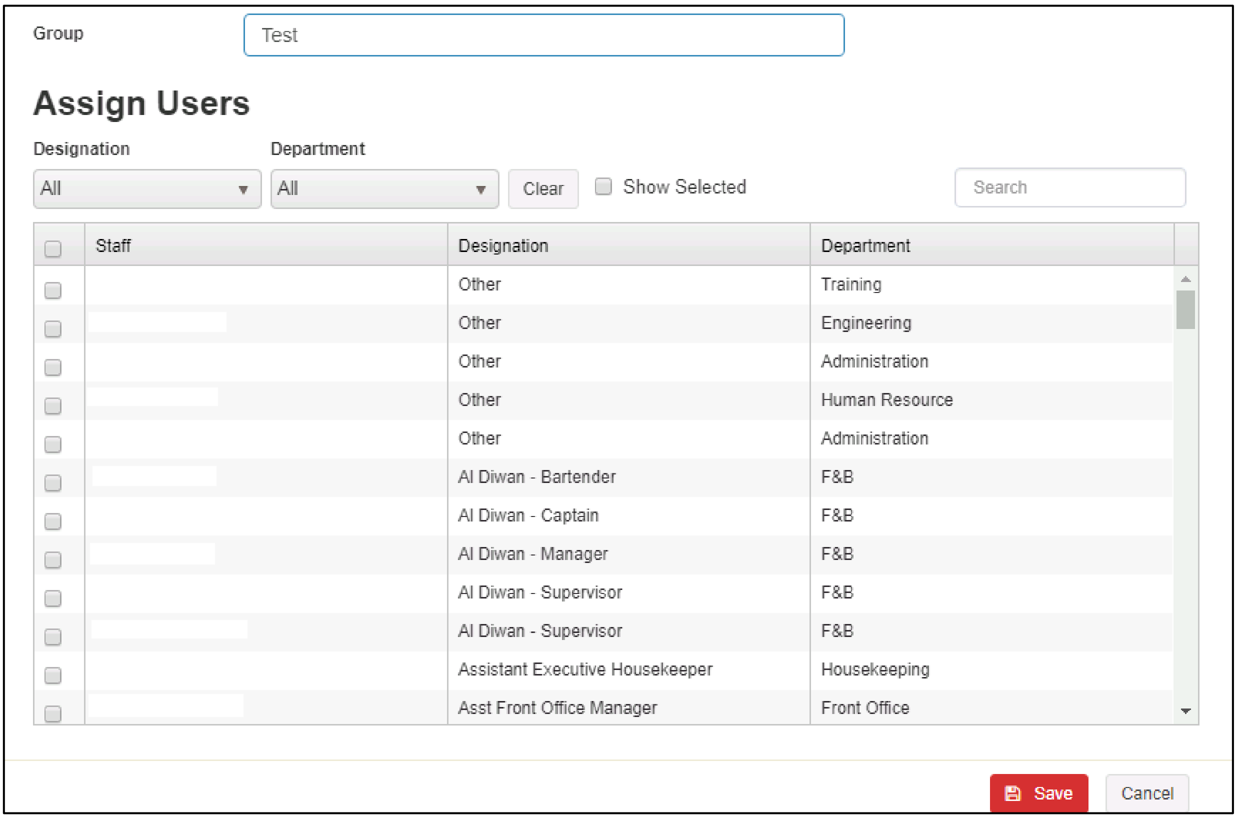
1. In the menu pane on the left, select **Configure Groups**.

   All previously created groups appear on the screen.



2. Add a new group or right-click to edit an existing one.





3. In the **Group** field, type the name of the group.
4. From the drop-down list, select **Designation/Department** to filter staff names based on filters
5. Select the checkboxes for the staff names to make them part of the group.
6. To delete groups, select the **Delete** icon for the group that you want to delete.

Note: Remember to assign rights to Inspection users.