

Checklists

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Checklist selection

iProjects Checkit offers users virtually unlimited ability to customize checklists to suit the way the practice works, apply the checklists to projects with extreme efficiency, and maintain a very high level of quality control with minimal overhead and unprecedented ease of use.

Customization works at many levels:

- ❖ All checklists come with what we consider “best practice” clauses flagged for project inclusion, as a guide. The system administrator can “one-click” tag any other items as best practice and un-tick any that are not applicable to the practice. Users cannot over-ride this selection, so if the practice decides a checklist item is required on typical projects, and that checklist is selected for a project, users will have to include it.
- ❖ System administrators can delete any checklist items, write new checklist items, and revise existing items, to suit the way the firm works. If these changes are tagged as “Firm”, they cannot be deleted by users.
- ❖ System administrators can mark any checklist items with any combination of the eight special tags described below.
- ❖ System administrators can do all of the above in different combinations for different project types, creating different checklist sets to suit the requirements of different types of projects.
- ❖ Users can make any selection of over 60 checklists, using the special guides provided in DDNA, to uniquely suit a project.
- ❖ Users can turn on or off any checklist items within those checklists, except for those tagged as “Firm”.
- ❖ Users can modify existing checklist items, and write new checklist items – except for those tagged as “Firm”.
- ❖ Users can re-assign any checklist item to any other team member, so that person-specific, project-specific checklists can be saved or printed. Thus, team members know exactly what their quality control responsibilities are, project by project.

Checklist setup

Project checklists are managed in two layouts, Design DNA (DDNA) and Details. **iProjects** provides two levels of selection aids:

- ❖ PROJECTS > DDNA provides a facility to see, at a glance, which checklists include check items related to one of the nine selector categories, and also provides a tool to view all checklists by project Stage.
- ❖ PROJECTS > Details displays checklists that were tagged in the relevant Project Type DDNA.

Before creating a project, users can review firm standard checklists, for any project type template available, in Office Admin > Custom DDNA. If you don't know how to access the checklists there, first review [UserGuide 4.3: Design DNA \(DDNA\)](#).

First select a template under **Discipline/Project Type**, then select a Stage. In the illustration to the right, we have selected Stage 200. You will see all checklists available for this Stage.

Now look at the Checkset Indicator, lower right of the DDNA page. We've selected "GS" (for Green Star") by clicking in the box, which "turns it on".

Now notice that two checklists – CL21 and CL24 – have a green check mark against them. This means that there is one or more checklist item in each of these lists that relates to Green Star projects.

By clicking on the red arrow against either of these, you can see the item or items that have "GS" ticked, and make a decision as to whether or not you want to include these checklists in your Green Star project (or QM project, BIM project, or whatever).

Try clicking on different indicators, then see which checklist items are being flagged. This feature is also very helpful for system administrators configuring checklists to suit a new project type, with a minimum of going over all the checklists.

By default, all checklists included in a *Discipline/Project Type* DDNA will be included in a project template created from that DDNA.

Stage CheckLists

ID	Title	
CL21	▶ Permit & Concept Studies	<input type="checkbox"/>
CL22	▶ Traffic and Parking	<input type="checkbox"/>
CL23	▶ Landscape Architecture	<input type="checkbox"/>
CL24	▶ Environmental - Siting & Planning	<input type="checkbox"/>
CL25	▶ Risk / WH&S Design	<input type="checkbox"/>
CL26	▶ BIM Project Setup	<input type="checkbox"/>

CheckSet Indicator

QM ESD Risk BW-1 MW-1
 GS BIM 2124 SW-1

Stage CheckLists

ID	Title	
CL21	▶ Permit & Concept Studies	<input checked="" type="checkbox"/>
CL22	▶ Traffic and Parking	<input type="checkbox"/>
CL23	▶ Landscape Architecture	<input type="checkbox"/>
CL24	▶ Environmental - Siting & Planning	<input checked="" type="checkbox"/>
CL25	▶ Risk / WH&S Design	<input type="checkbox"/>
CL26	▶ BIM Project Setup	<input type="checkbox"/>

Configuring checklists when creating a project

When you create a new project, you have the option of including checklists or not. If you do not un-tick the *Use Checklists?* box, they will be included.

Use Checklists?
 Use Teamwork?

Checksets

<input type="checkbox"/> QM	<input type="checkbox"/> Risk
<input type="checkbox"/> GS	<input type="checkbox"/> 2124
<input type="checkbox"/> ESD	<input type="checkbox"/> BW-1
<input type="checkbox"/> BIM	<input type="checkbox"/> SW-1
	<input type="checkbox"/> MW-1

Then you can tick any combination of the nine boxes under *Checksets*. Doing this configures every checklist item in the listed checklists for

whatever combination of characteristics you have selected, by looking at each checklist item to see if any of those items are pre-coded against any of the selected characteristics, and if they are, putting a tick in the large box in the checklist for those items.

To see how this works, look at the *Megatowers Training Sample Project*. **QM** and **ESD** have been checked in the *Checksets* box.

By default, the Checklist and TeamWork tools are included. If they are not needed for the project, uncheck one or both as appropriate.

■ Select a combination of QM, GS, ESD, BIM and/or Risk as appropriate. Refer to User Guides "CHECKSETS" if unsure.

QM = Quality Management project

GS = Green Star project

ESD = Environmentally Sustainable Design project

BIM = Building Integration Modelling project

Risk = A project where state laws (eg QLD) require higher than usual designer responsibility for risk during construction.

Contract for construction: Select one of AS 2124, or the appropriate Australian Building Industry Contract (ABIC) BW-1, SW-1 or MW-1 only if Stage includes Contract Administration.

If you look at Checklist CL12, you will see that there is a tick in the large box at left – meaning that the item will be included in the project checklist set.

Checklist No.	Project	Refer to Abbreviations for details	Assignment
	Megatowers Training Sample		
No.	225		Checked by Sign-off Date
CL12a	If ESD or Green Star project, use CL13 in conjunction with this checklist.	<input type="checkbox"/> Firm <input type="checkbox"/> QM <input checked="" type="checkbox"/> GS <input checked="" type="checkbox"/> ESD <input type="checkbox"/> BIM	<input type="checkbox"/> Risk <input type="checkbox"/> 2124 <input type="checkbox"/> BW-1 <input type="checkbox"/> SW-1 <input type="checkbox"/> MW-1

Now go to the Details layout and un-tick ESD. Go back to CL12; you will now see that this tick mark has disappeared – meaning that this item (and all other ESD-tagged items) will NOT be included in working checklists for the project.

Checklist No.	Project	Refer to Abbreviations for details	Assignment
	Megatowers Training Sample		
No.	225		Checked by Sign-off Date
CL12a	If ESD or Green Star project, use CL13 in conjunction with this checklist.	<input type="checkbox"/> Firm <input type="checkbox"/> QM <input checked="" type="checkbox"/> GS <input type="checkbox"/> ESD <input type="checkbox"/> BIM	<input type="checkbox"/> Risk <input type="checkbox"/> 2124 <input type="checkbox"/> BW-1 <input type="checkbox"/> SW-1 <input type="checkbox"/> MW-1

This feature not only saves users absolutely massive amounts of time in configuring checklists – where a single click can turn on or off tagged checkpoint items across 60+ lists – more importantly, it means that users DO NOT need to know whether a checklist item applies or not. That decision has been made, first by iProjects, and then verified or amended by the firm’s system administrator. This feature is a very powerful, built-in quality control tool that protects the firm from inexperienced professionals making decisions outside their level of expertise.

Fine-tuning your Project Checklists

After you have created a project, you can go back to the DDNA layout for the project and add or delete checklists simply by ticking or un-ticking the box at the left of the relevant checklist. Doing this will add or remove the checklist from the list showing in the Details layout.

Stage CheckLists			
ID	Check	Title	Green Text = Tool not built yet
CL21	<input checked="" type="checkbox"/>	Permit & Concept Studies	
CL22	<input type="checkbox"/>	Traffic and Parking	
CL23	<input type="checkbox"/>	Landscape Architecture	
CL24	<input type="checkbox"/>	Environmental - Siting & Planning	
CL25	<input checked="" type="checkbox"/>	Risk / WH&S Design	
CL26	<input type="checkbox"/>	BIM Project Setup	

The process of creating a new project (or updating an existing project) creates a set of checklists for that project. Checklists can be added, or deleted, from the project by using the project DDNA, by unchecking or checking them if they were previously unchecked.

Once you are satisfied that you’ve got the checklists you need for a project, you can further fine tune the selection by manually putting a check mark against any checklist item in any checklist, which will add that item to the Project Checklist set.

Finally, if necessary, you can modify the content of any checklist item. Simply open the checklist, highlight text that needs changing, and start typing. **NOTE:** This feature does *not* apply to the “Firm” checking category, unless you have been assigned this capability in the **Users & Permissions** list. This control is to preserve the firm’s reliance on “best practice” principles, and ensure that items selected by the firm as applicable to every project will indeed be performed on every project. See UserGuide **5.6: Users & Privileges** for more information.

You can also create new checklist items, using the same process as described below under **Adding checklist items**.

Assigning checklists to the project team

When you create a new project, you are asked to put your initials in the “Checklist initials” box, shown right.

When you create the project, these initials will be pasted into every project checklist item, shown first right.

You can then reassign any checklist item to any other member of the project team, by clicking on the assignment, opening the drop-down box, and either selecting one of the initials in the drop-down, or adding new initials to the list (image second right).

This customizes the checklists so that you can save or print out *person-specific* checklists for the project. This means that **all of the items** on that person’s list must be done by that person – there is no escaping responsibility for personal action.

You can go back and re-assign any checklist items to any other person at any time, and save/print new lists.

The screenshot shows a form with two input fields: "Phase *" and "Checklist Initials". Below these is a table with two columns. The left column has headers "Assignment", "Checked by", and "Sign-off Date". The right column has headers "Assignment", "Checked by", and "Sign-off Date". Under the "Assignment" header in the right column, a dropdown menu is open, showing a list of initials: "CEN", "EB", "JM", and "UT". The "CEN" option is highlighted in blue.

Printing, zooming, toggling between project & master checklists

To the right of each checklist, there is a little control panel, shown right, that allows you to create an email, zoom in or out, send the file to print, or to let you view either the master checklist or the checked items only.

The Email button is a powerful feature of **iProjects** that, when selected, performs the following functions:

- Saves the checklist as a .pdf file;
- Opens a new email addressed to the client contact address
- Enters the Project Number in the Email Subject Line;
- Identifies the Contact as the Client;
- Identifies the Project by its name;
- Identifies the the Form ID from which the .pdf file was created; and
- Attaches the .pdf file to the email.

The screenshot shows a control panel with the following elements:

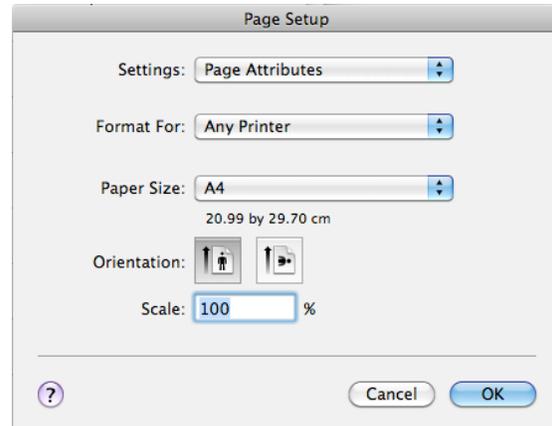
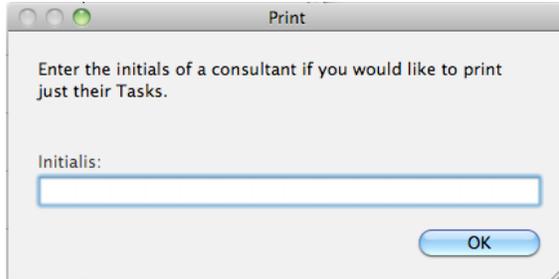
- [Email](#) (blue text)
- [Zoom](#) (blue text)
- [Print](#) (blue text)
- [Save As PDF](#) (blue text)
- Checked (blue text)
- Master (blue text)

 To the right of these buttons is a vertical line of text:

- Click twice to zoom in; once to zoom out.
- CHECKLIST ITEM: Tick box in left-hand column if required for this project.
- CHECKING NOTES; Identify by Checklist No.

All of the above ID functions can be revised by the User as needed.

If you click the **Print** button, you will first get a dialog box that asks if you want to print the checklist for a specific person.



If you enter the initials of a team member, it will print only the tasks assigned to that team member. If you leave it blank, it will print all the active checklist items.

After clicking “OK”, you will get a standard page setup dialog box that is set by your computer, allowing you to make all the usual printing adjustments.

Quality control

Checklists provide a two-level quality control feature: **Signoff** and **dating** of individual checklist items by the user, and **overall signoff** of the completed checklist by the Project Manager.

Quality checking & signoff:

For each checklist item, as shown to the right, boxes are provided for checking and sign-off date.

Assignment	CHECKLIST ITEM: Tick box in left-hand column if required for this project
Checked by	
Sign-off Date	CHECKING NOTES (below): Identify by Checklist No.
GEN	CL12b: Note that client has changed project title - check and revise in all documents.
Charles	
24/12/02	

In addition, there are spaces for comments in the field to right of this signoff box. Note that the green User Note permits any box to be used for a note against any checklist item on the page. This allows for notes that go over four lines – the maximum that can be entered and be visible in any of the Notes fields.

Overall checking & signoff (quality verification):

Note that at the bottom of each checklist, there is a CHECKING RECORD, for multiple use – up to 12 times. This record, a second level of quality verification, is for use by the Team Leader to verify that all items signed off are in fact completed. (See next page for example.)

Use is made super-easy by providing the initials of all listed team members in a pop-up, the clicking on the date field brings up a little calendar with the current date displayed, for selection. Verification still demands that the person verifying be diligent and honest (no more than would be required under any system) – but the record-keeping aspect is reduced to two mouse-clicks per check.

<input checked="" type="checkbox"/>	names, spellings.	<input type="checkbox"/> ESD	<input type="checkbox"/> SW-1		
<input type="checkbox"/>		<input type="checkbox"/> BIM	<input type="checkbox"/> MW-1		
CL12e	Prepare list of info from other consul	from client &	<input checked="" type="checkbox"/> Firm	<input type="checkbox"/> Risk	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/> QM	<input type="checkbox"/> 2124	
			<input type="checkbox"/> GS	<input type="checkbox"/> BW-1	
CHECKING RECORD: Date & sign for each check period Refer CHECKKIT User Guide.		NOTATIONS: Building Services Engineer Construction Manager		D/PM: Design/Project Manager HVAC: Heating Ventilating & Air Conditioning PIC: Principal in Charge	
				QS: Quantity Surveyor SEng: Structural Engineer TL: Team Leader	
1	CEN 9/03/2011	3		5	
2		4		6	
				7	
				8	
				9	
				10	
				11	
				12	

ID TK-CL12
 Issue date: 8/3/11
 Printed: 9/3/11
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Should the verifier find problems with the signoff or completion details, they can add notes against any checklist item for further action.

Customizing Checklist

Administrators can add, delete or modify checklist items.

Adding Checklist items:

1. Open a Stage Checklist Title.
2. CLICK NEW on the upper right hand corner of the checklist.
A new checklist item appears at the bottom of the list. Input content.
3. You can also add a checklist item by duplicating an existing item:
4. Select a checklist Title item.
5. Go to Records > Duplicate record on the FileMaker panel.
6. A duplicated record appears immediately below the original record. Type in new content to create a new checklist item.

Deleting Checklist items:

1. SELECT a checklist Title item.
2. Go to Records> Delete record on the FileMaker panel.
3. CLICK Delete in the dialogue box.