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HOW TO CREATE A PRE-START CHECKLIST

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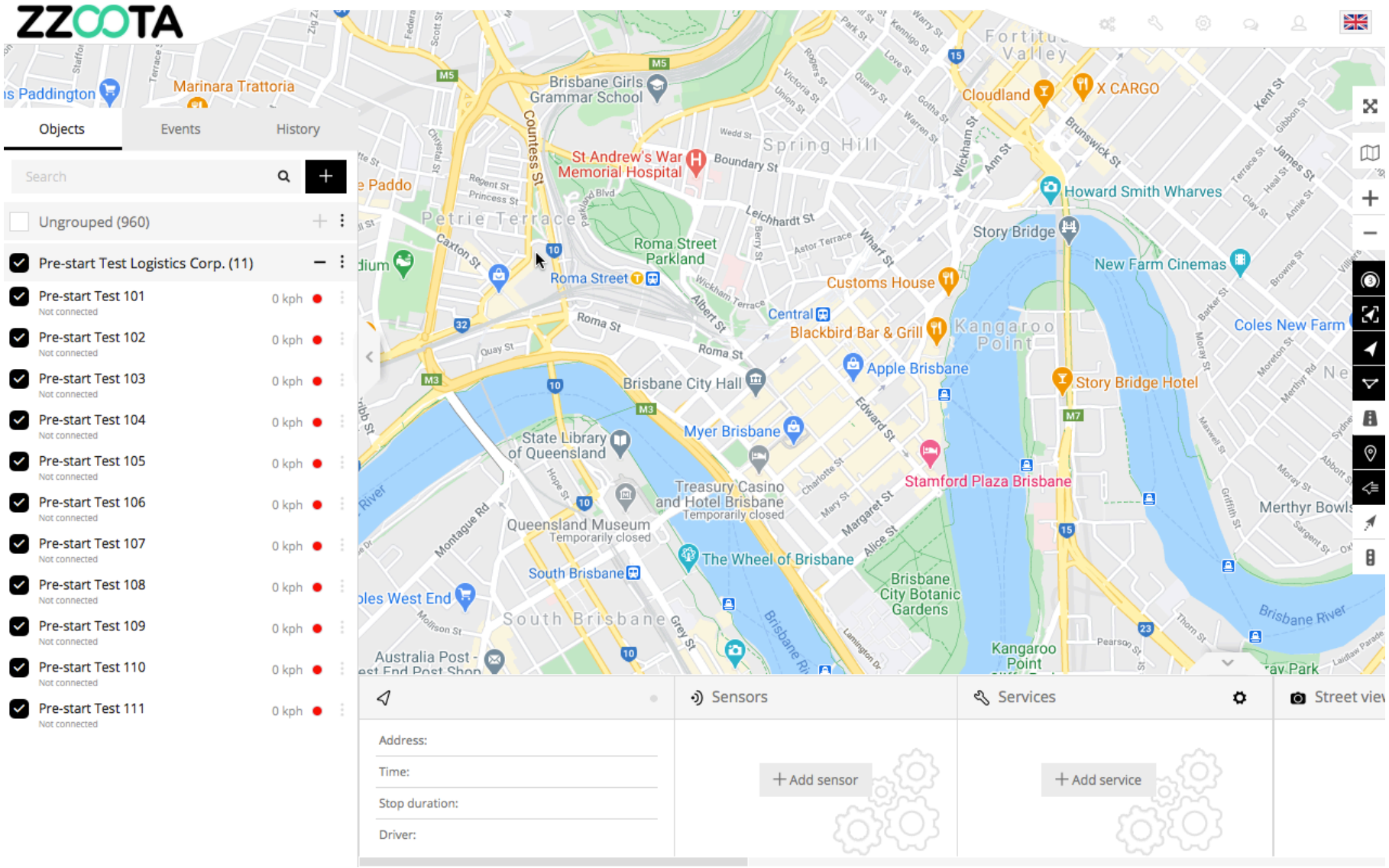
STEP 1

Log into the zzootaLink platform and navigate to the Main page.



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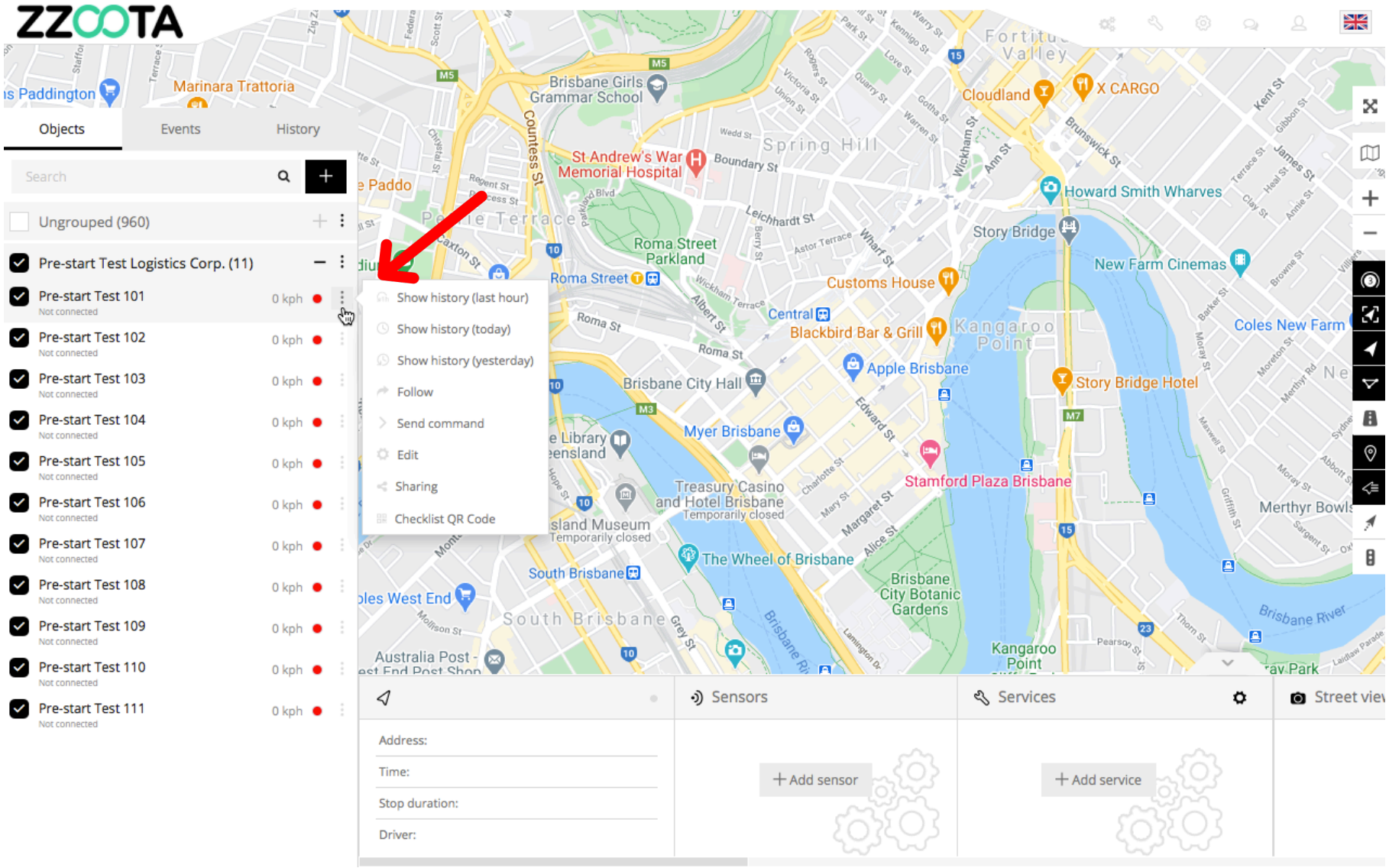
STEP 2

Choose the Object you wish to add the checklist to from the Navigation panel.

Select the Overflow menu “⋮”.



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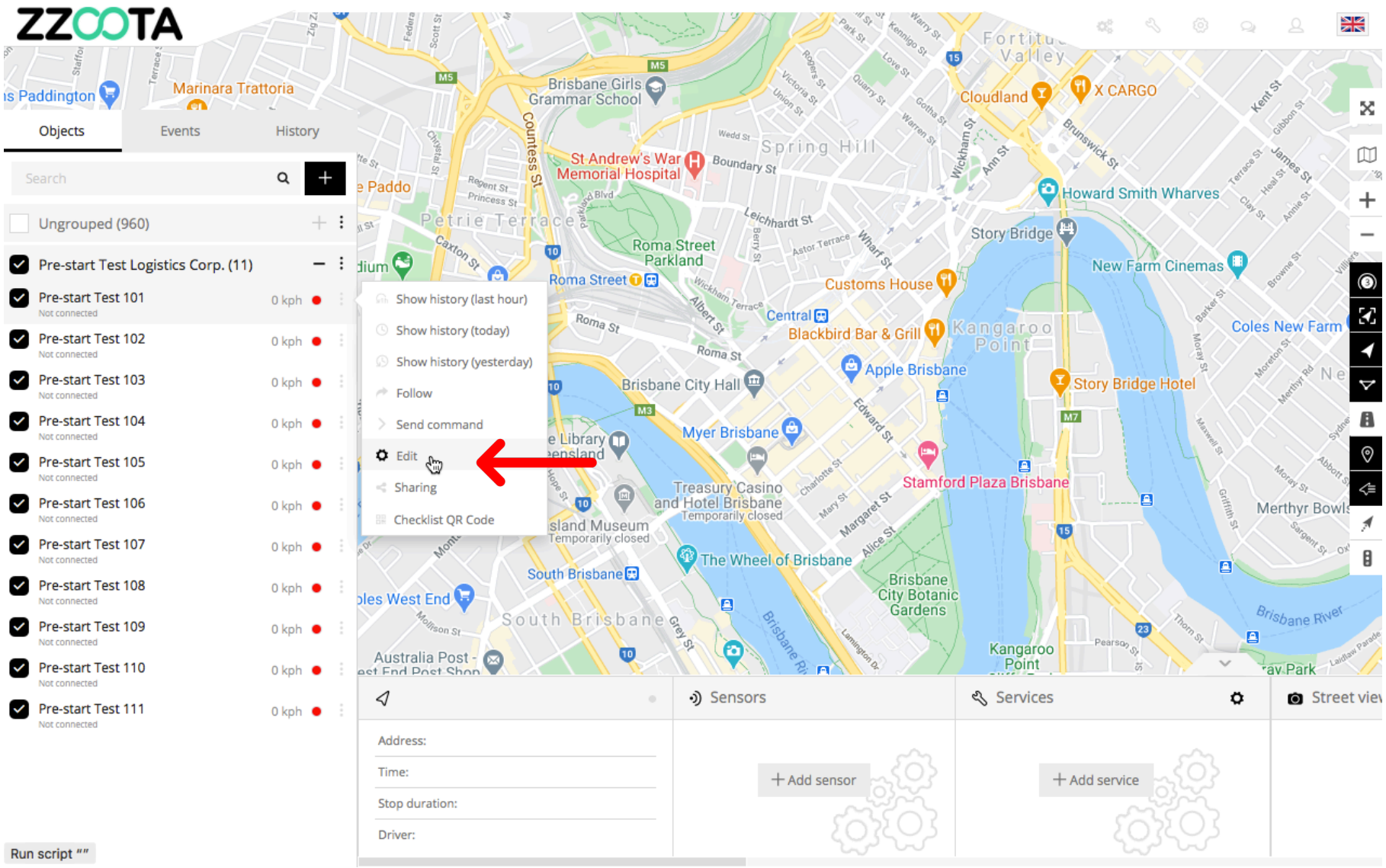
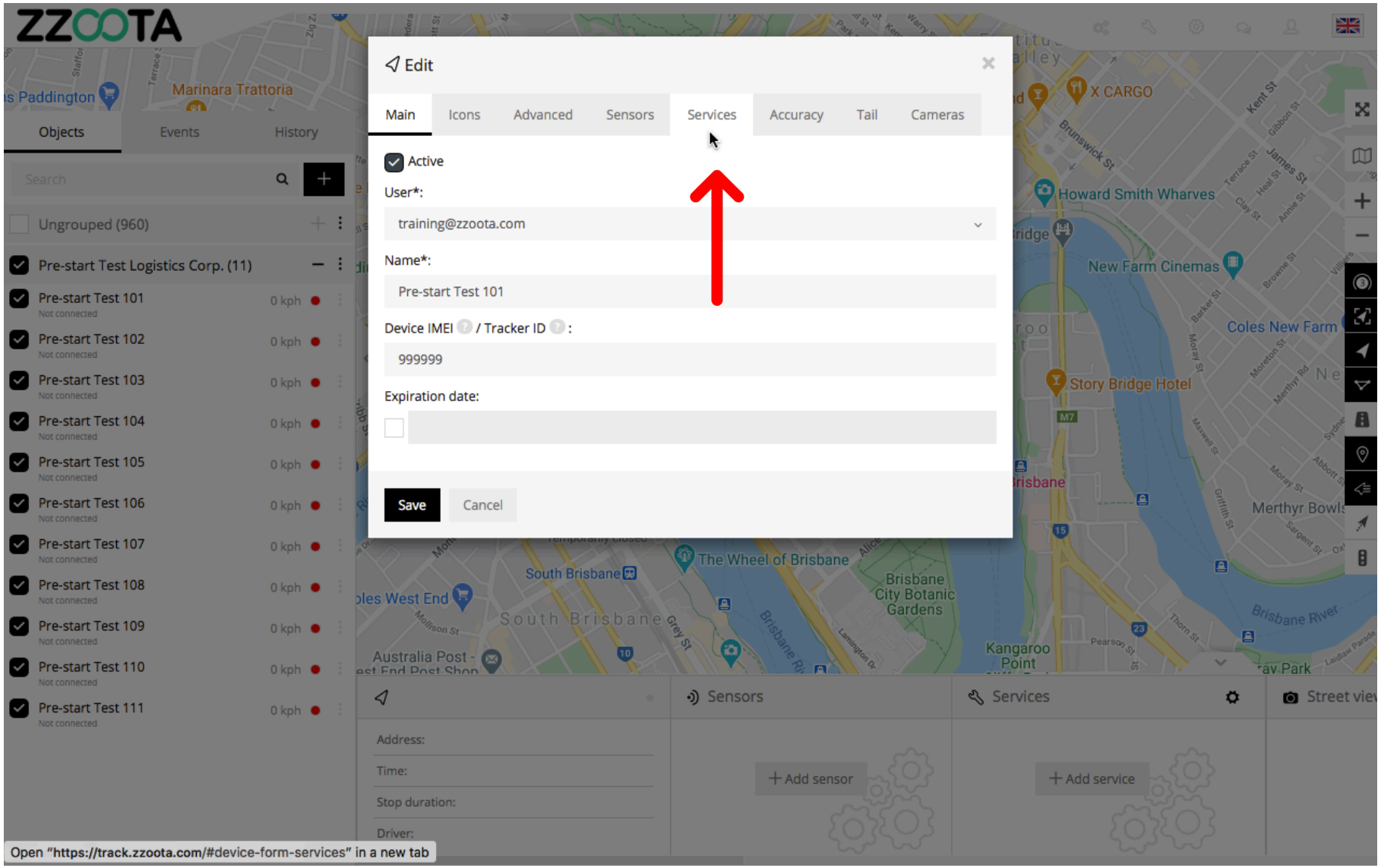
STEP 3

Select “Edit”.



STEP 4

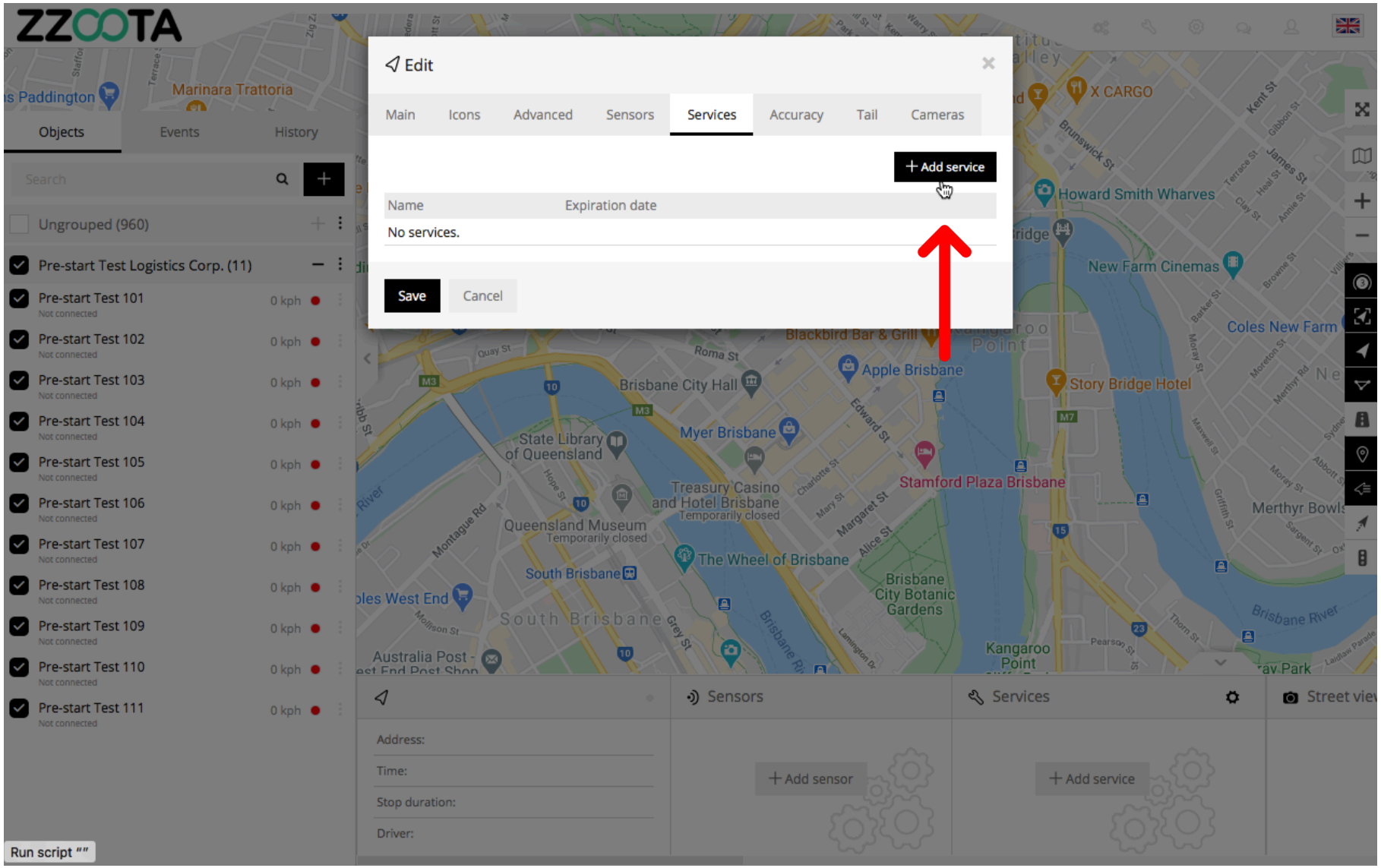
Select “Services”.



STEP 5

Select “+ Add services”.

For Info : If a Checklist has already been created it would be listed here.



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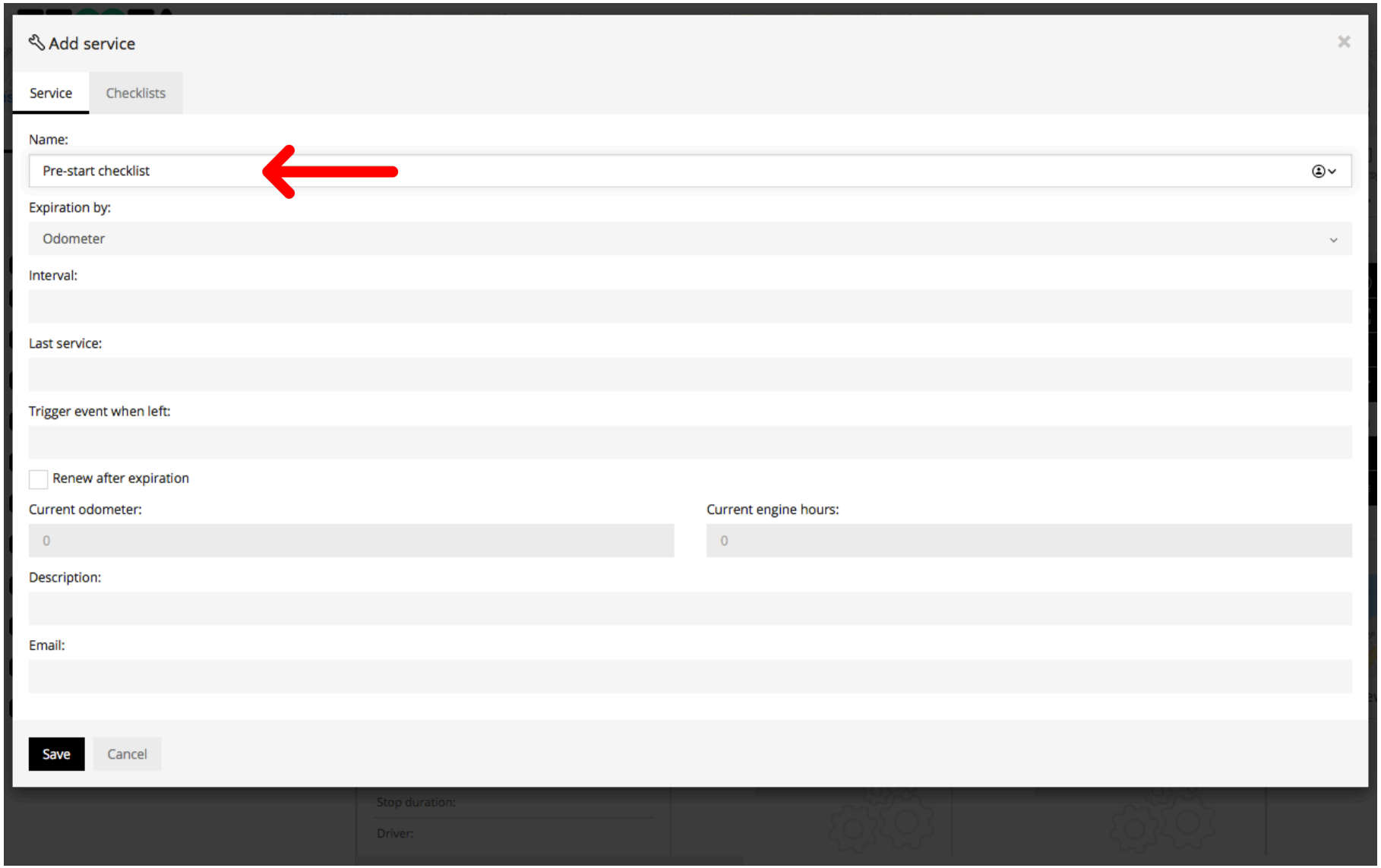
STEP 6

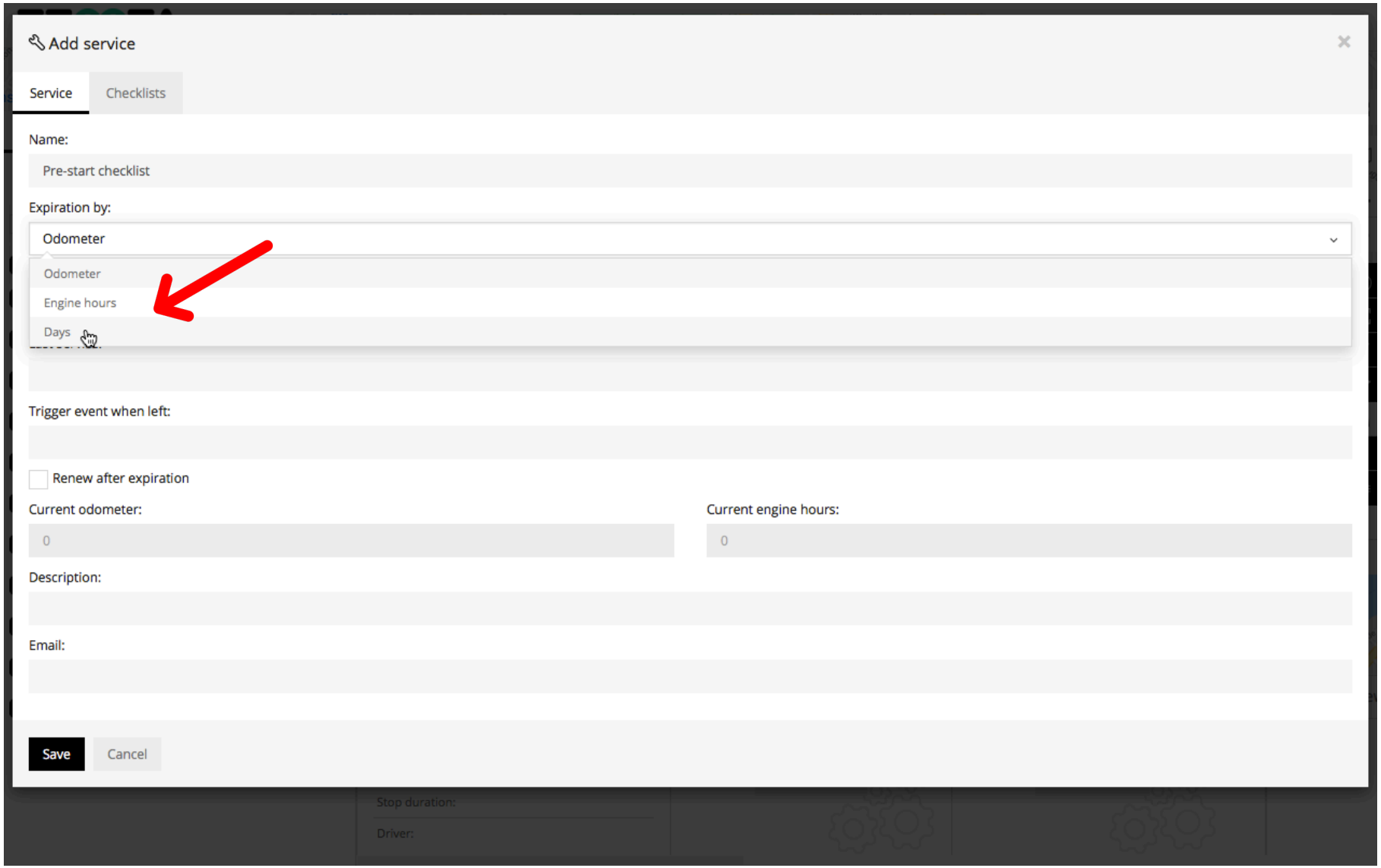
Name the Checklist.



STEP 7

Change the “Expiration by” to “Days

For Info : The Pre-start Checklist can only be actioned once per day. With Days selected and the following default values entered (next slide) the checklist will renew at midnight and be ready for the next day.



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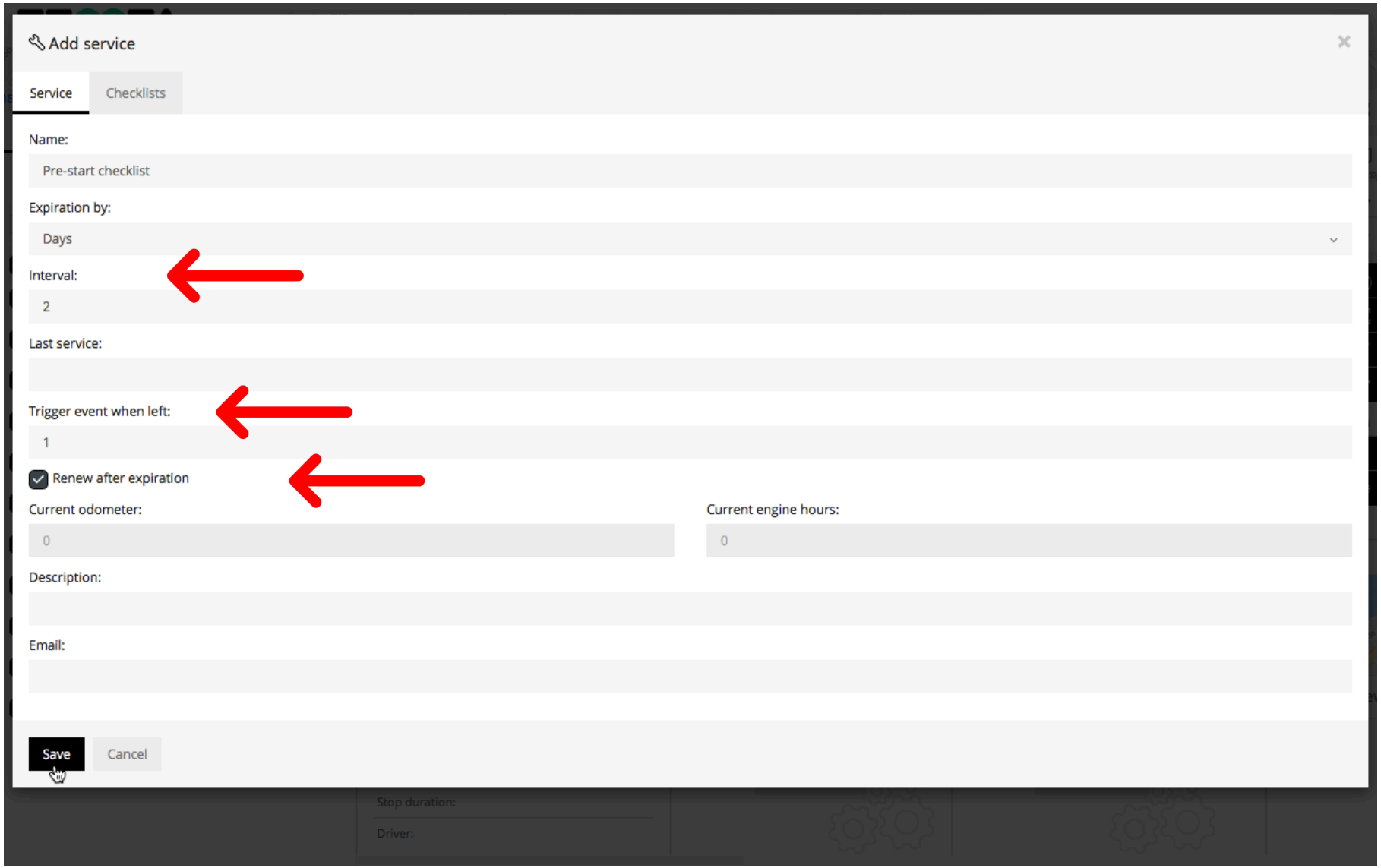
STEP 8

For a Pre-start Checklist make the following default entries.

Interval = 2

Trigger event when left = 1

Check the box for “Renew after expiration”



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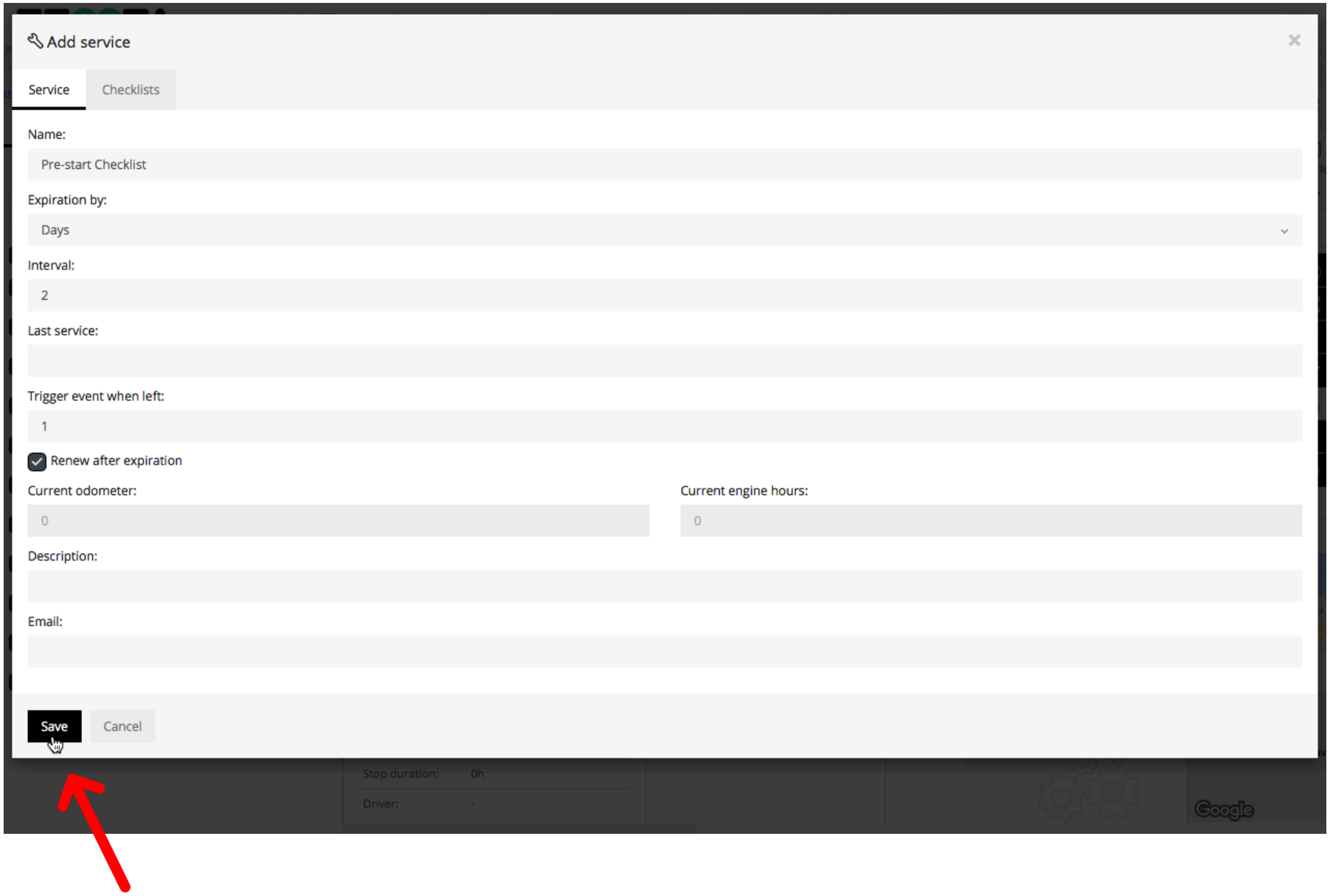
STEP 9

Select “Save”.



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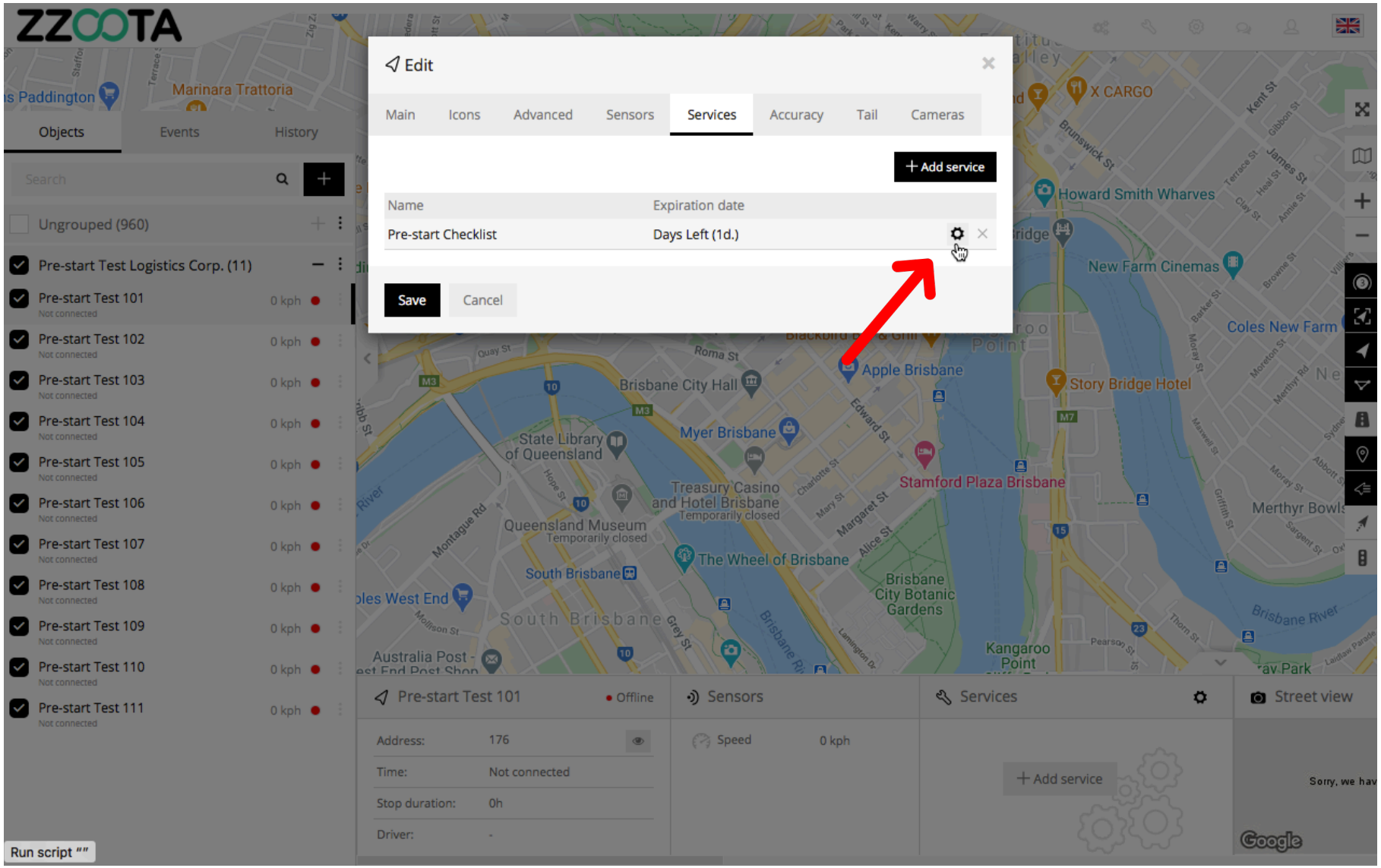
STEP 10

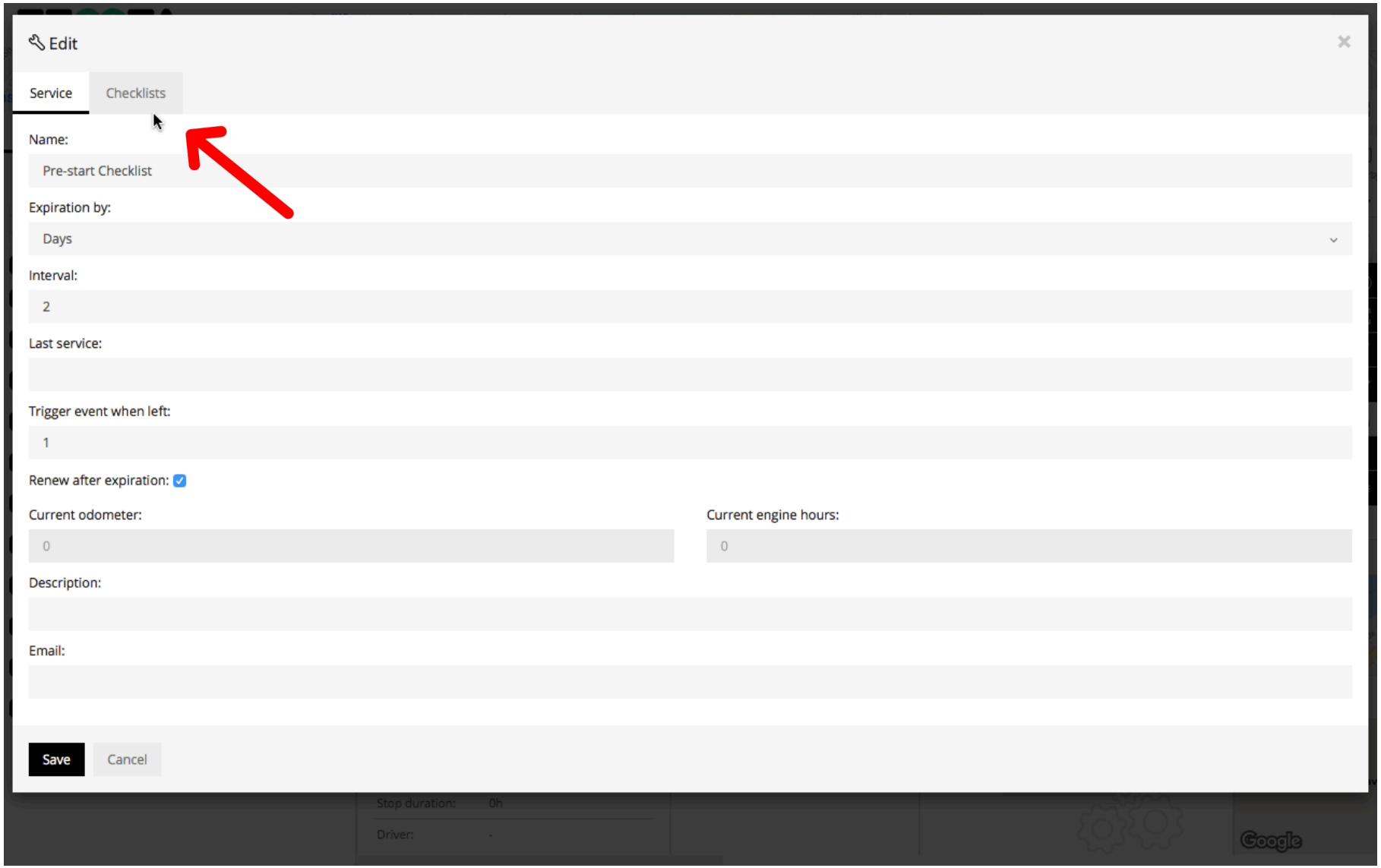
Select the cog “⚙” to return to the Edit page.



STEP 11

Select “Checklists”.

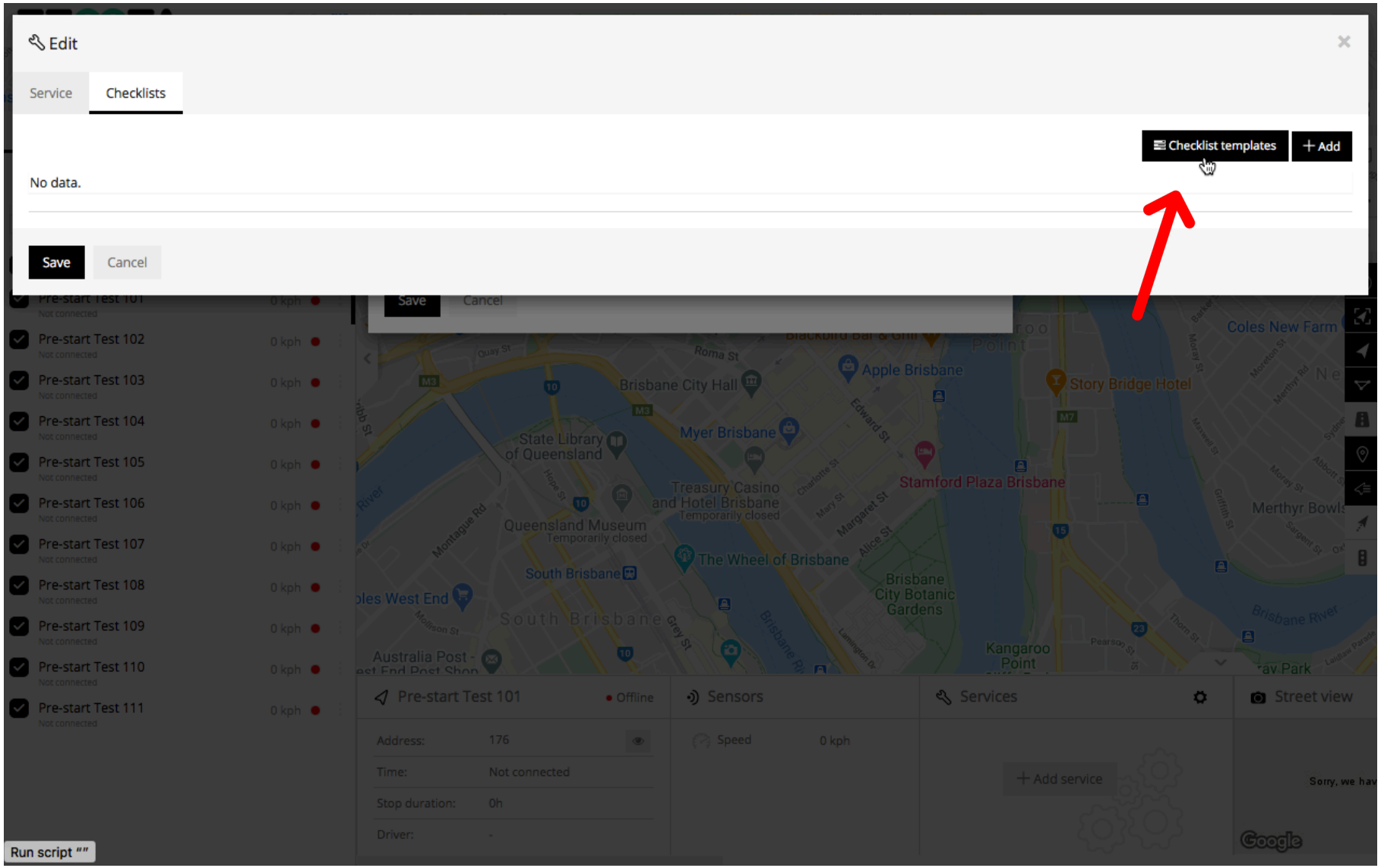
For Info : The checklist has been given a name and some rules, now we need to give the checklist some Activities by selecting a Checklist Template that was created earlier.



STEP 12 OPTIONAL

Select “Checklists templates”.

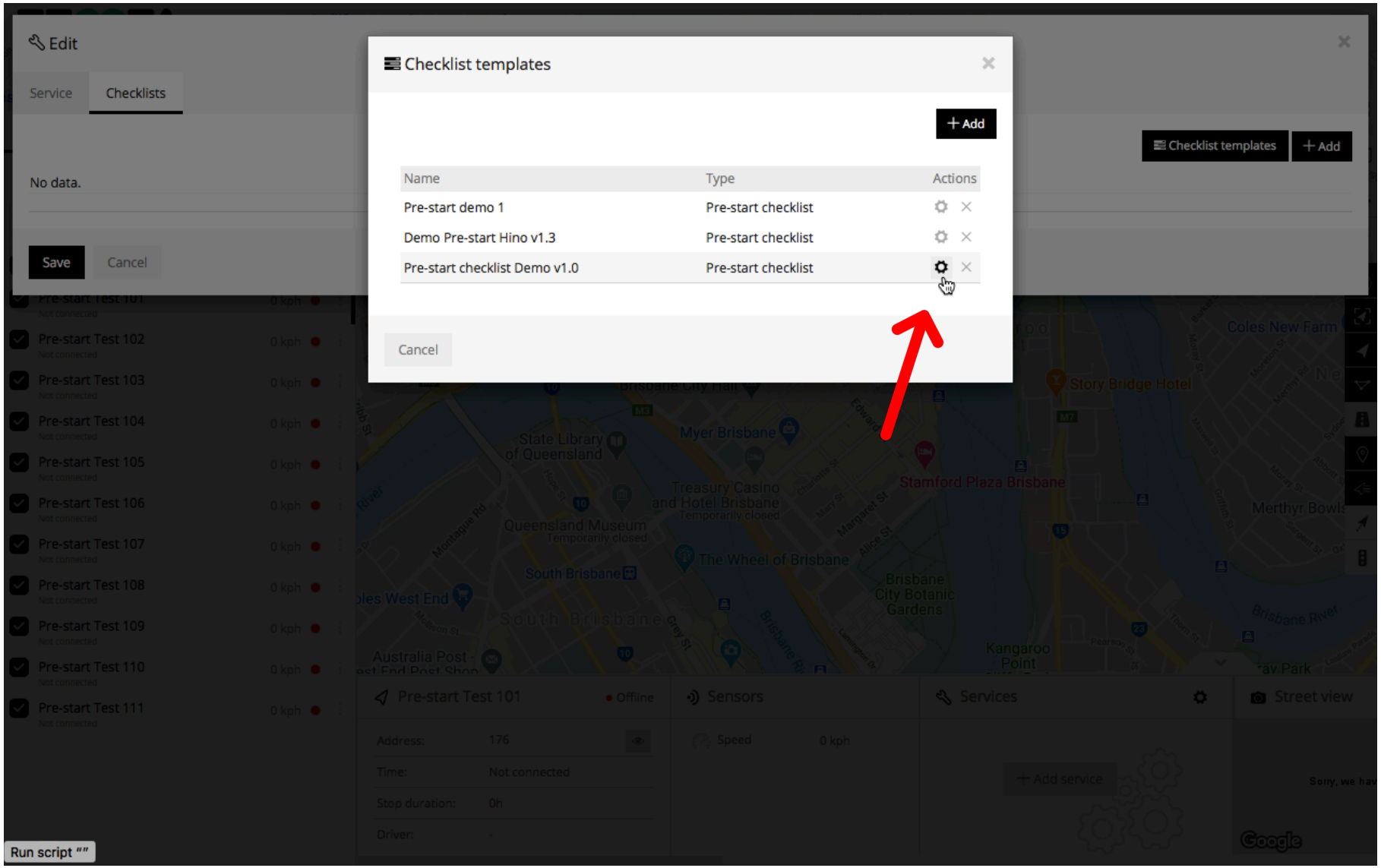
See next slide



OPTIONAL

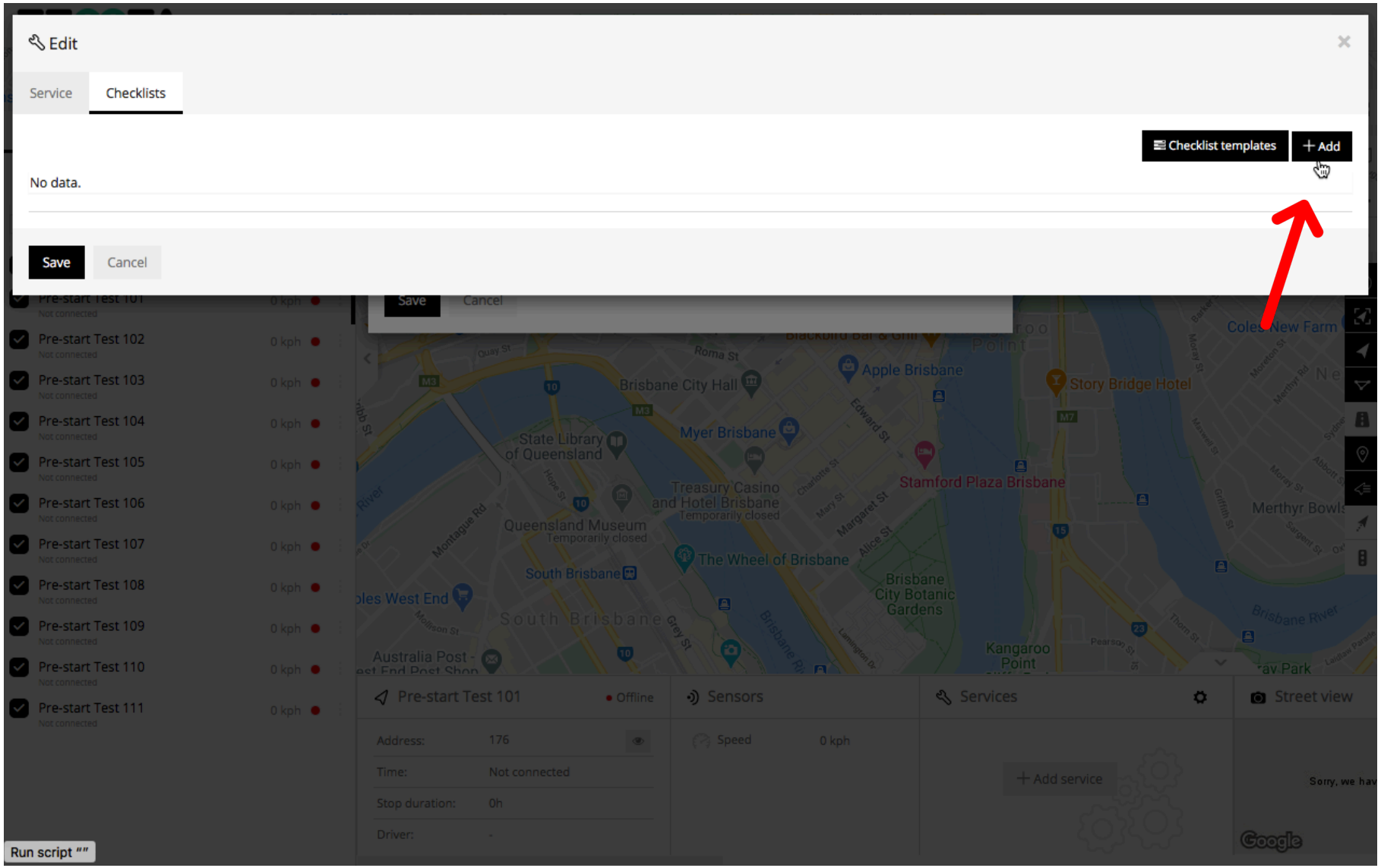
Here we can review, edit or add a template.

Close the box by either selecting Cancel or the X in the top right corner.



STEP 13

Select “+ Add”.



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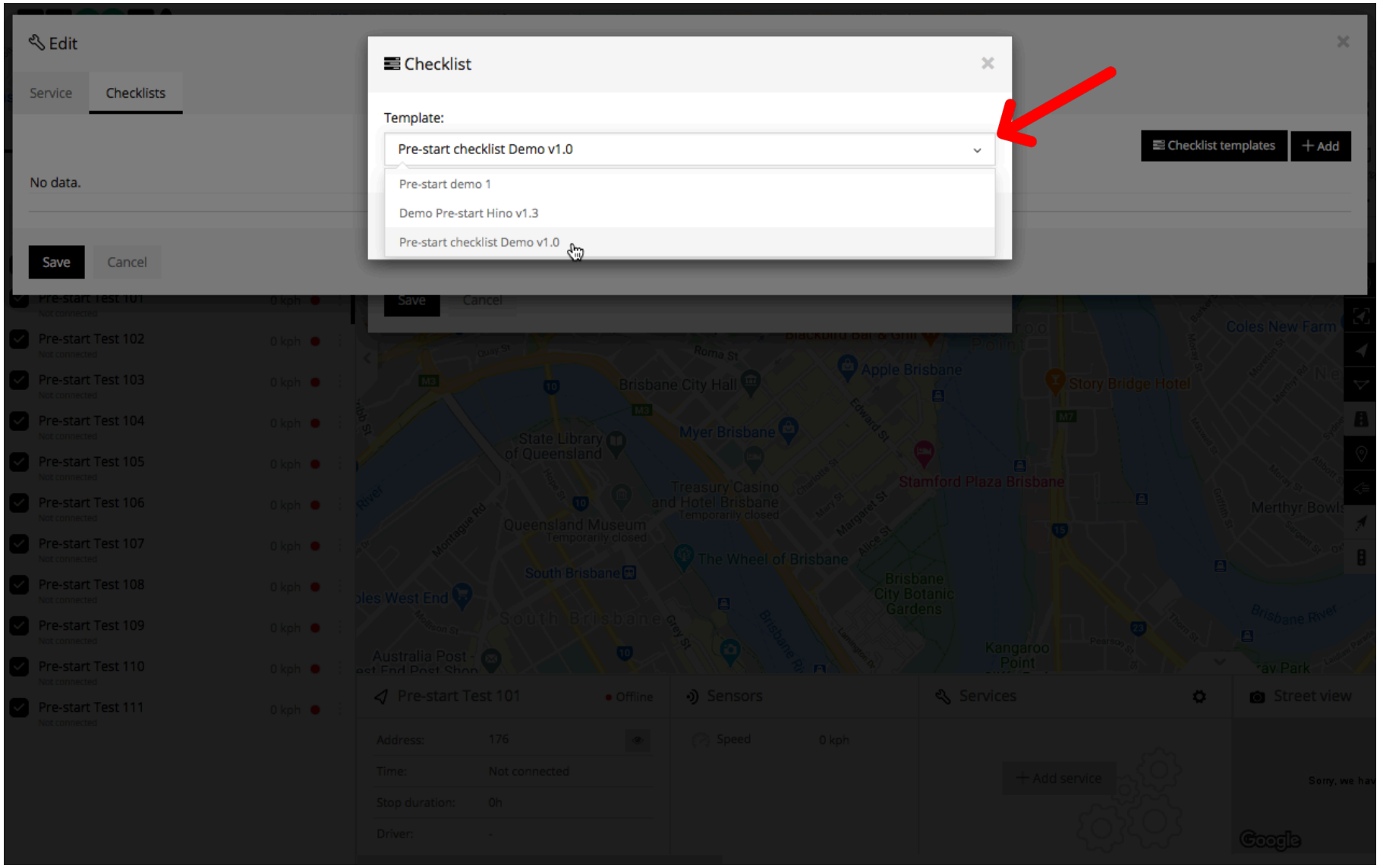
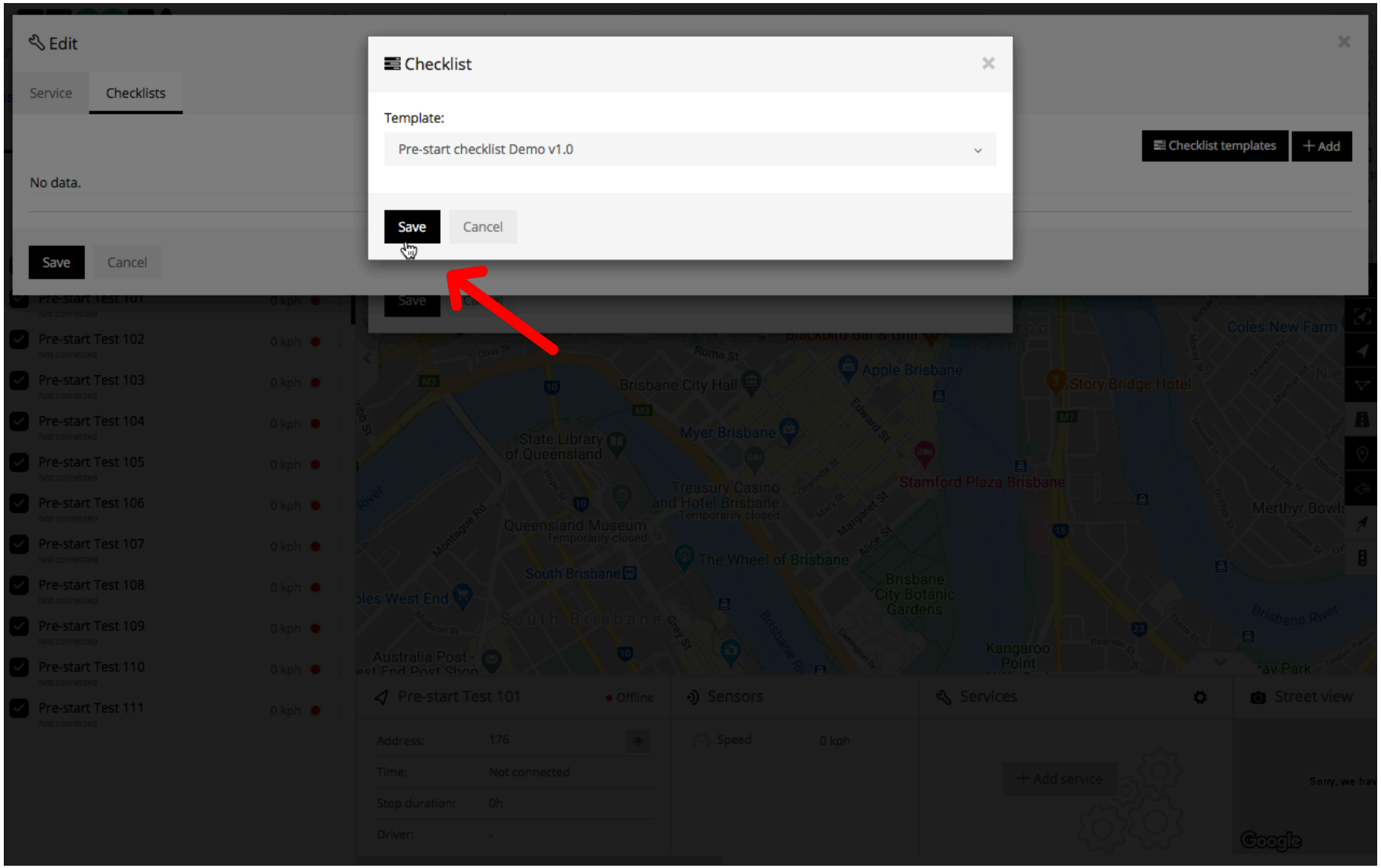
STEP 14

Select the template of your choice from the drop-down menu.

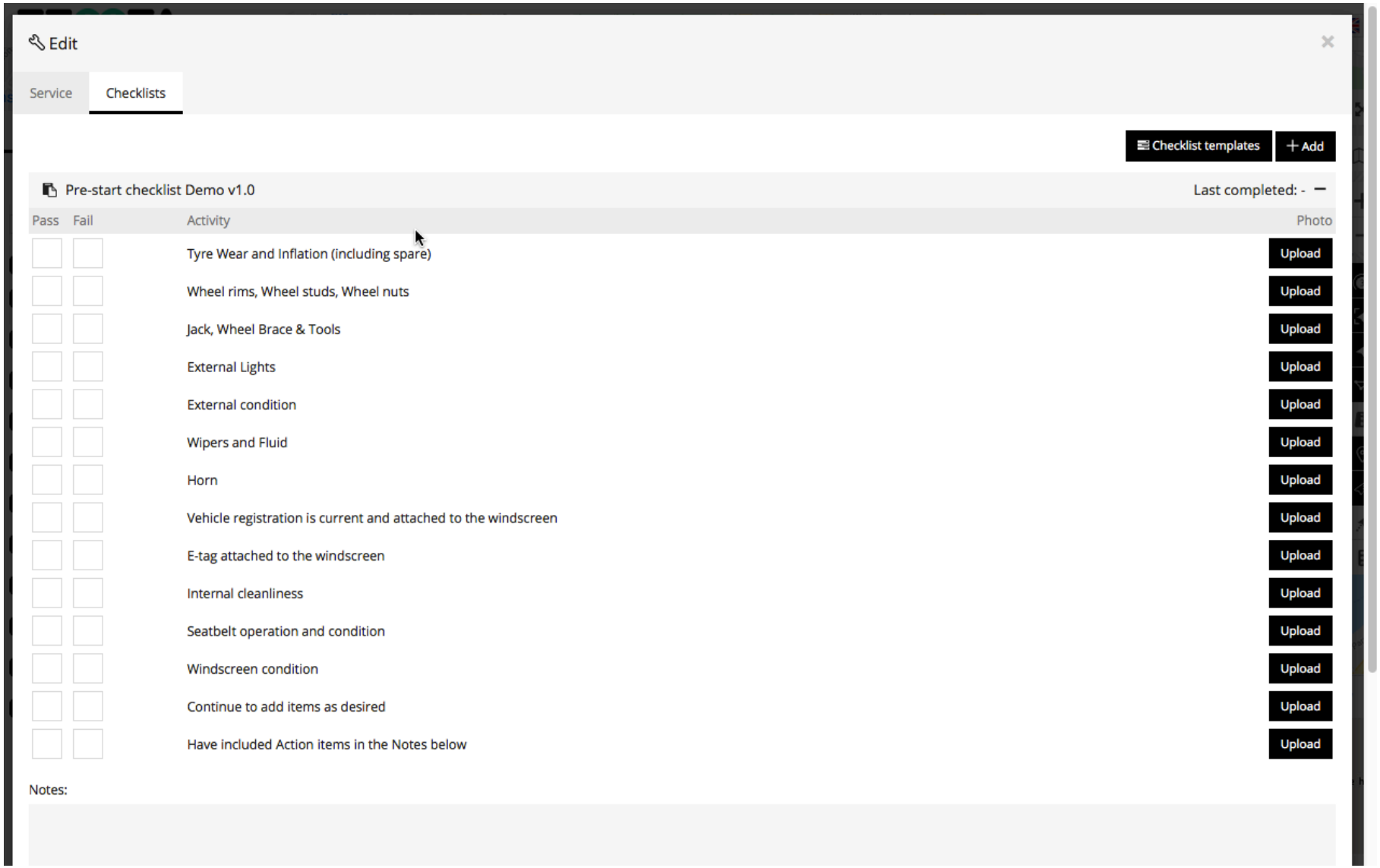


STEP 15

Select “Save”.



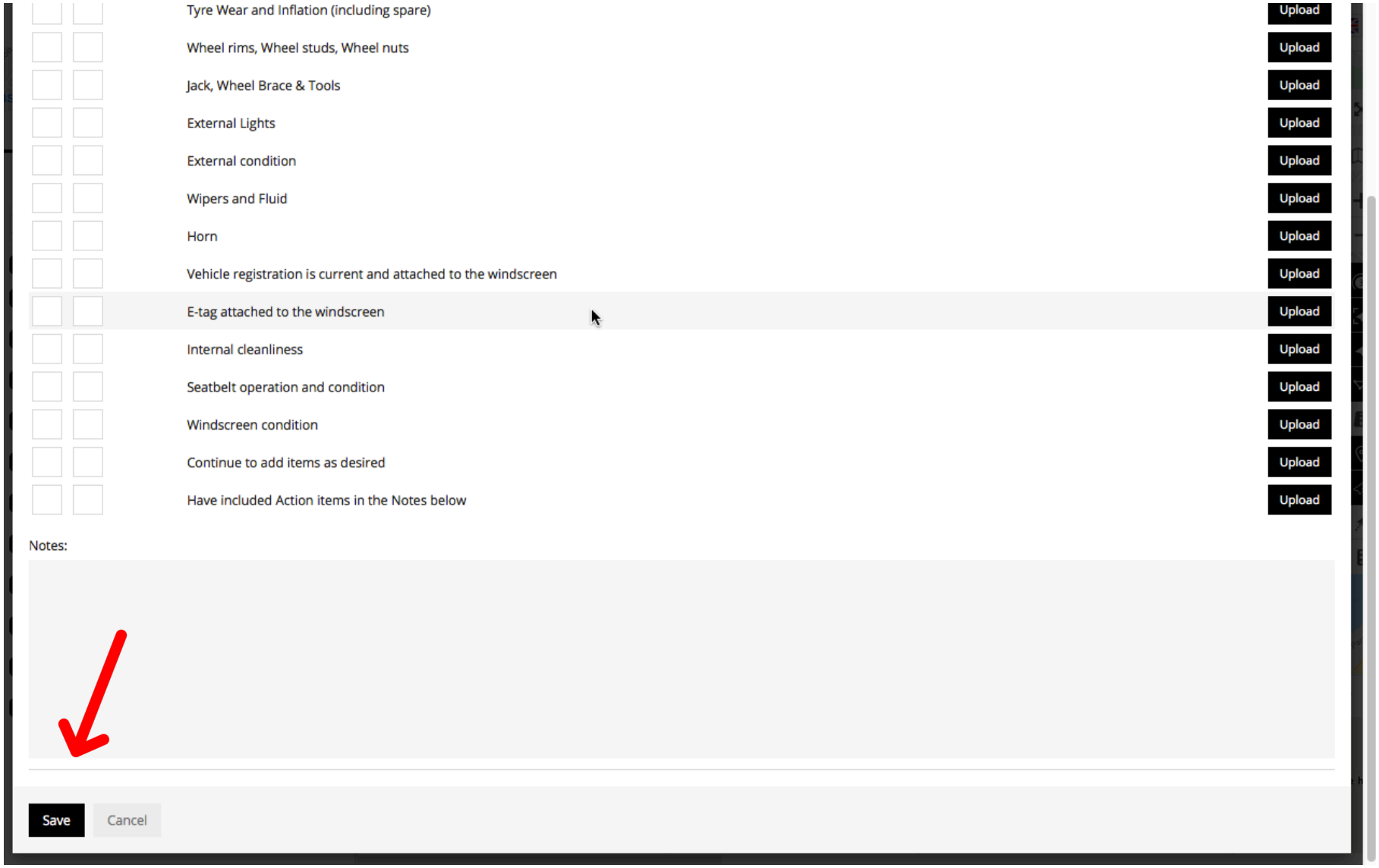
The template has now been loaded.



STEP 16

Scroll to the bottom of the page.

Select “Save”



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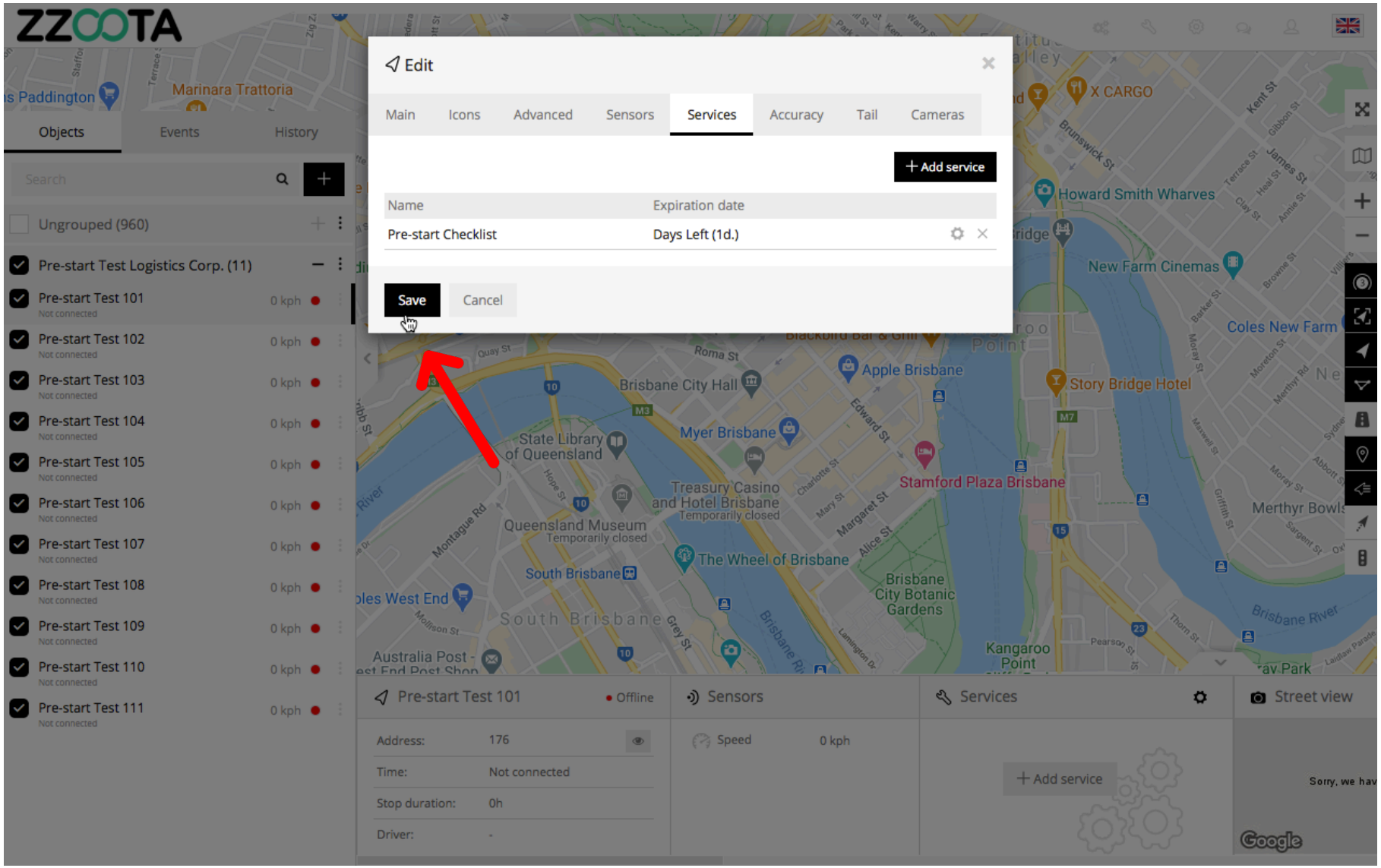
STEP 17

Select “Save”



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END OF PRESENTATION