CHECKLIST GENERATOR USER MANUAL

RestaurantOwner.com

OVERVIEW

I. About the Checklist Generator

a. Purpose

The Checklist Generator is a free resource for RestaurabtOwner.com members. The purpose of the program is to provide users the ability to create and utilize checklists using an IPad, touch tablet or smartphone device instead of conventional paper checklists.

The program has been structured in a way that allows members to create checklists that can be used by managers and staff while preventing access to their RestaurantOwner.com member account.

Unlike paper checklists, when users have completed a checklist you are sent an email notification showing user and time it was completed.

b. Benefits

Some of the benefits of using an online checklist include:

- Easy checklist design tool provides spreadsheet look and feel with no training needed even if you've never used a spreadsheet.
- Eliminate the need for printing and storing paper checklists.
- Touchscreen friendly architecture makes data entry fast, fun and user-friendly when using am IPad, tablet or smartphone.
- Checklists can be grouped by user-defined shifts and stations that fit your restaurant's unique structure.
- Users can easily be added and removed from access to your checklists but they will not have access to your RestaurantOwner.com membership login.
- Notification option enables you to receive an email each time a checklist has been completed.
- Completed checklists are stored in the RestaurantOwner.com cloud for future review.
- Search tool allows you to view the exact time and by whom each checklist was completed.

c. Best Use

Checklist are comprised of rows and columns. Rows typically contain the items being checked while columns are used to record the type of check being done such as a completion checkbox, a count or a place to write a comment about a specific item.

It's more practical to have a series of short checklists than it is to have lengthy, all-encompassing checklists. Keep in mind that a checklists must be completed by a single user. For instance, if you are creating a cook line checklist and you want each position (grill, sauté, fry, etc.) to complete the checklist for their own station then create a separate checklist for each station.

On the other hand, if you want the kitchen manager or chef to complete the entire line checklist then you may want to combine all stations into a single checklist.

Checklists are a great way to ensure consistency in all areas of restaurant management. Some of the different ways checklists can be used are as follows:

- Manager Opening Checklist
- Line Check
- Prep Checklist
- Station Setup
- Bar Opening Checklist
- Closing Checklist
- Host Opening/Closing Checklist
- Multi-unit Inspections Checklist
- Periodic Maintenance Checklist
- Permits & License Review
- Staff Reviews/Evaluations
- Customer Service Review
- Customer Survey
- Mystery Shopper Review

d. Support

Support is only available to RestaurantOwner.com members and will not be provided to users or staff that have been assigned access. The discussion forum is the ONLY pipeline for support we offer for this tool. All emails or phone calls requesting support will be directed to post their request on the discussion forum.

SETUP

- II. Add/Edit Store
 - a. Naming and adding a new Store
 - 1. To add a new store click on the <u>Add Store</u> link from this page:

http://www.restaurantowner.com/members/checklistAdmin/stores.cfm

Stores Shifts Sta	ations Users Checklists Search			Store: (ID:)
MANAGE STORE				
Welcome to Checklis	ts! The first step in using Checklists	is to set up a Store ID.		
Your users will enter	the Store ID in addition to their thei	r username and password	when logging in.	
Add Store				
Store ID	Store Name	Shifts	Stations	Active
No store configured				

- 2. Your assigned users will enter the Store ID in addition to their username and password when logging in.
- 3. Store IDs:
 - Must be between 5 and 15 characters
 - Can only contain numbers and letters
 - Cannot contain spaces or special characters
 - Are not case sensitive "MyStore" and "mystore" are considered the same
- 4. Once a store(s) is added they will appear on the Manage Store page and can also be selected from the drop down box in the upper right hand corner of the screen.

Stores Shifts St	tations Users Checklists Search	Admin		Store: Konrads (ID: 18) 🔽
MANAGE STORE				
Store ID	Store Name	Shifts	Stations	Active
18	Konrads	Manage	Manage	Yes
23	Konrads2	Manage	Manage	Yes

III. Add/Edit Shifts

- a. Adding Shifts
 - 1. To add a shift click on the Add Shift link from this page:

http://www.restaurantowner.com/members/checklistAdmin/shifts.cfm

Stores Shifts Stations Users Checklists Search Admin	Store: Konrads (ID: 18) 🔽
MANAGE SHIFT	
Shift Name:	
Active: • Yes O No	
Submit	

- 2. Enter the shift name (i.e. Night, Day, Graveyard, AM, PM, etc) in the Shift Name Box and click Submit. If you have multiple stores ensure you are in the correct store (Upper right corner).
- 3. You can deactivate or reactivate a shift from the Manage Store Shifts screen by clicking on the shift, selecting "No" or "Yes" and clicking Submit.

IV. Add/Edit Station

a. Adding Stations

1. To add a station click on the Add Station link from this page:

http://www.restaurantowner.com/members/checklistAdmin/stations.cfm

Stores Shifts Stations Users Checklists Search Admin	Store: Konrads2 (ID: 23)
MANAGE STATIONS	
Add Station	
Station	Active
No stations configured.	

- 2. Enter the Station name (i.e. Server, Dishwasher, Manager, Busser, etc) in the Station Name Box and click Submit. If you have multiple stores ensure you are in the correct store (Upper right corner).
- 3. You can deactivate or reactivate a station from the Manage Station Shifts screen by clicking on the shift, selecting "No" or "Yes" and clicking Submit.

Stores Shifts Stations	Users Checklists Search Admin	Store: Konrads2 (ID: 23)
MANAGE STATION		
Station Name:	• Yes O No	
	Submit	

- V. Add/Edit Users
 - a. Initial Setup

Before checklists can be created and used, a user must be created. Please note that this is entirely separate from your RestaurantOwner.com account login and can only be used to access the checklist application for filling out and completing checklists. It is highly recommend that each member create a user for themselves, so that they can view and complete checklists from the application themselves.

b. Adding a User

To add a user, click on "Users" in the top menu.

Stores | Shifts | Stations | Users | Checklists | Search | Admin

Click the "Add user" link, and fill out the form Username, First and Last Name, Email, and Password are all required. Usernames must be at least 5 characters in length, and passwords must be at least 7 characters in length.

MANAGE USER	
Usename:	NewUser
First Name:	John
Last Name:	Doe
Email:	johndoe@outlook.com
Notify:	O Yes 🖲 No
MMS Number:	
Active:	Yes No
Password:	password
Confirm Password:	password
	Submit

After clicking the submit button the new user will be visible, and as long as Active is set to "Yes" the new user will be able to log in immediately. In case a user should no longer have access to the application, setting Active to "No" will block any login from their account.

c. Never Delete Users

Users should never be deleted, only edited. There is no limit on the number of users you can create, but the application will be easier to manage if users are recycled, as long as the information is updated.

d. Notification

Each user has a setting labeled Notify which is disabled by default. If Notify is set to yes, then whenever a checklist is completed which has also been set to Notify, an email will be sent to the email address listed on the user's account. For an email to be generated both the user and the checklist must be set to Notify, this feature allows users to keep in touch whenever important checklists are completed, and allows them to review the contents from the RestaurantOwner.com account.

ADD/EDIT CHECKLISTS

VI. Preparation

a. Have a plan before starting (Purpose, rows and columns)

Checklist are comprised of rows and columns. Rows typically contain the items being checked while columns are used to record the type of check being done such as a completion checkbox, a count or a place to write a comment about a specific item.

It's more practical to have a series of short checklists than it is to have lengthy, all-encompassing checklists. Keep in mind that a checklists must be completed by a single user. For instance, if you are creating a cook line checklist and you want each position (grill, sauté, fry, etc.) to complete the checklist for their own station then create a separate checklist for each station.

On the other hand, if you want the kitchen manager or chef to complete the entire line checklist then you may want to combine all stations into a single checklist.

b. Keep Them Simple and Consider Screen Size

The Online Checklists are primarily intended for use with an IPad, notebook or smartphone device. Checklists with too many columns will force the user to scroll to the right to complete a column check and will thus be more cumbersome. Consider limiting the number of columns when designing.

c. Save as you go

Remember to save your checklist frequently during the design process. If you navigate away from the page without saving it you will lose any changes made since the last time you saved it.

VII. Adding a New Checklist

a. Step 1 - Naming and Categorizing a Checklist

To add a new checklist click on the "Add Checklist" link

Stores Shifts Stations Users Checklists Search A	Admin		
MANAGE CHECKLIST O Checklist Name: Shift: choose	2 e shift Y Station: choose s	3 station 🔻 Notify: 🛙	Active:
6 7 8 9 Group 10 Move Disable Indent Header Item	11 → 13 inactive ▼Inactive ▼	← ↔ Inactive ▼In	← → ← → nactive ▼
Add new row 14 Preview Save 15	-Inactive -Inactive Text Checkbox Numeric Display Only 12		

The Add Checklist screen shown above must be completed before a checklist can be saved for use. An explanation of each numbered part of the screen is as follows:

- 1. This is the name that will appear in the list of checklists the user can select from. This name will also be displayed on the checklist form and saved files.
- 2. All checklists must be assigned to a Shift which can be selected from the drop down list from the Shifts you defined earlier. If you have not added a Shift then you must do so before continuing.
- 3. All checklists must be assigned to a Station which can be selected from the drop down list from the Stations you defined earlier. If you have not added a Station then you must do so before continuing.
- 4. The Notify box should be checked if you want the program to notify by email all listed recipients whenever a checklist has been completed.
- 5. The Active checkbox must be checked for this checklist to appear in the list of checklists available to users when they log in. It is typically left unchecked during the design phase or when making changes to it so that users will not try to complete it during this process.
- 6. The Move column for each row allows you to move rows up or down in the list.

- 7. The Disable column when checked removes the row from view when users are completing a checklist.
- 8. The Indent +/- is used to increase or decrease the indentation of the row. This feature is particularly helpful to organize lists into categories, steps or sections.
- 9. The Group Header when checked designates this row as a title or header line only. Group Headers are displayed in Bold text and do not allow column data entry. They are intended for use as a category, step or section header description.
- 10. The Item is where the item descriptive text or instructions are entered for items appearing in the rows. Items can include up to 100 characters of text.
- 11. The Columns is where you define the types of checks to be completed for each row. You can have up to a maximum of 10 column checks for each row,
- 12. There are 4 different Column Types that can be defined as explained in Step 2 below. You must designate one in order to enter data when completing a checklist.
- 13. The Column Move arrows allow you to move a column to the right or left in the list.
- 14. The Add New Row link is used to add additional rows to your checklist. When adding new rows keep in mind they cannot be deleted once saved. You will either need to change the values entered for rows or use the Disable row option to restrict it from view by the user.
- 15. The Preview button is used to see what the checklist will look like to the user. Preview does not save the checklist. Use the Save button to save your checklist and or your changes.
- 16. Save the checklist.

b. Step 2 - Add/Edit columns

- Column Types To add a column to the checklist you must activate it by selecting a Column Type from the drop down list. There are 4 different column types to choose from:
 - 1) Text Allows user to enter a comment, letter or number of up to 100 characters of text.
 - 2) Checkbox Allows the user to mark as completed.
 - 3) Numeric Restricts values to numeric only. Typically used to record counts.

4) Display Only – Use to display text or numeric information such as par levels, containers, instructions or other constants. This type of column is intended for display information only and cannot be changed by person completing a checklist.

 Column Labels – Once a Column Type has been selected you will be prompted to assign a label or title for the column (1). The image below shows examples of various column labels. 3. When selecting the Display Only Column Type you will be prompted to assign values for each row item in the checklist as shown below (2).



- 4. Rearranging Columns The Column Move arrows allow you to move a column to the right or left in the list. Be sure to save the checklist after rearranging columns.
- Deleting Columns There is no way to delete a column; however, you can deactivate the column by setting the Column Type to Inactive. You can also delete any text for the Column Labels before deactivating the column.

c. Step 3 – Add/Edit Rows

- Group Header vs. Input Rows When the Group Header box is checked the row is designated as a title or category line, is displayed in Bold text and does not allow users to enter column data when completing a checklist.
- 2. Must Assign Text value to the Item Column Item descriptions may not be left blank and must have a text or numeric value for each row added.
- Use Column Checkbox When checked, users will be prompted to enter a value for this column. Leave unchecked if this row item does not need a value entered for the corresponding column.
- 4. Display Text When a column has been designated as a Display Only column you must enter the text to display for this row item as shown in the image above.
- Rearranging Rows Use the arrows in the Move column to move a row up or down in the list. You can also control the indentation by increasing (+) or decreasing (-) the indentation for the text column.

6. Add New Row – to add additional rows click on the Add new row link.

Checklist Preview					
Checklist Name: Line Check - Saute Shift: Dinner Station: Saute Noti					
Item	PAR	Comment	Ready		
Product					
Angel hair portions 8-oz.	25				
Fettuccine portions 8-oz	15				
Penne portions 6-oz.	8				
Shrimp portion 3-oz.	15				
Veggie portion 5-oz.	6				
Mushroom slices	2 qts.				
Chopped garlic	Sixth pan				
Chopped green onion	1 qt.				
Butter portions	50				
Lobster stock	1 qt.				
Pasta seasoning	Sixth pan				

- Preview Button Click on Preview button to see what the checklist will look like to the user.
 Preview does not save the checklist so it is recommended to save your changes first.
- 8. Save Button Click the Save button to save your changes. You can still edit the checklist after each save.

SEARCHING COMPLETED CHECKLISTS

I. Browse completed lists

To browse completed checklists, login to your RestaurantOwner.com account and browse to <u>http://www.restaurantowner.com/members/checklistAdmin/search.cfm</u>. This link will take you to the checklist application homepage. From there click on "Search" in the top menu:

Stores | Shifts | Stations | Users | Checklists | Search | Admin

This page will display all completed checklists. Checklists can be searched for by keyword, shift, station, or date. By default only 25 checklists will appear on each page, however this can be changed to 50 or 100.

SEARCH USER CHECKLISTS						
Keyword:	Keyword: Shift: Any Shift ▼ Station: Any Station ▼					
Completed: Yes Date	Completed	:	to Sho	w Per Page: 25 V Search		
Checklist Name	Shift	Station	Completed By	Date Completed	Actions	
FOH Cleaning Checklist	Night	Server	Amanda Daggett	03/28/2014 @ 12:22PM	View HTML	View PDF
FOH Cleaning Checklist	Night	Server	Amanda Daggett	03/28/2014 @ 12:22PM	View HTML	View PDF
BOH Cleaning Checklist	Night	Dishwasher	Sharon Davis	03/28/2014 @ 12:22PM	View HTML	View PDF
BOH Cleaning Checklist	Night	Dishwasher	Sharon Davis	03/28/2014 @ 12:22PM	View HTML	View PDF
Closing Checklist	Night	Manager	John Smith	03/28/2014 @ 12:21PM	View HTML	View PDF
Closing Checklist	Night	Manager	John Smith	03/28/2014 @ 12:21PM	View HTML	View PDF
Opening Checklist	Day	Manager	Robert Phillips	03/28/2014 @ 12:21PM	View HTML	View PDF
Opening Checklist	Day	Manager	Robert Phillips	01/14/2014 @ 03:51PM	View HTML	View PDF

Each completed checklist will display the checklist name, shift, station, date completed, and employee who completed the checklist (managed from the users section). To view a completed checklist, simply click on "View HTML" link, which will open the form in a new tab, which you can view or print. To view checklists which have not yet been completed, select "No" from the "Completed" drop-down menu and checklists which have been opened but not yet completed will appear. To return to the checklist application simply close the tab.

II. Print Using PDF View

To view the completed checklist in a .PDF format, click on "Search" in the top menu, then click on the "View PDF" link in the Actions column:



From the PDF view the .PDF file can be printed or saved to your computer.

III. Reviewing user and timestamps

To view the user who completed a checklist and the time it was submitted, click on "Search" in the top menu, and beside each completed checklist will appear the user, date, and time of the checklist:

	Completed By	Date Completed
	Amanda Daggett	03/28/2014 @ 12:22PM
h		

If a checklist has been started, but not finished, the user will display, but the date completed will display N/A.

USING THE CHECKLIST

I. Navigation link

To access the checklist application direct the members of your organization to <u>https://www.restaurantowner.com/checklists</u>. This link will prompt the user for three pieces of information: a Store ID, Username, and Password.

- II. Login
 - a. Store ID

To find a Store ID, login to your RestaurantOwner.com account and browse to http://www.restaurantowner.com/members/checklistAdmin/stores.cfm, click "Stores" in the top menu, and locate the store associated with your account:

Stores | Shifts | Stations | Users | Checklists | Search | Admin

The Store ID will be a number located beside the store name:

MANAGE STORE	
Store ID	Store Name
4	<u>RestaurantOwner</u>

b. Username

To view the users with access to the checklist application click on "Users" in the top menu:



This screen will display usernames, first names, and last names:

STORE USERS		
UserName	First Name	Last Name
<u>RO-15</u>	Amanda	Daggett
<u>RO-14</u>	Sharon	Davis
<u>RO-12</u>	Robert	Phillips
<u>RO-13</u>	John	Smith

The username is a link to the user's profile, which will pull up additional settings. This username is required for the user to access the application through

http://www.restaurantowner.com/members/checklistAdmin/users.cfm.

c. Password

When a user is created they are assigned a password, this password cannot be viewed by either the RestaurantOwner.com member or by the user. For instructions on resetting a user's password, read the section below.

d. Retrieving Lost Password User Information

1. Must contact the RO member with access to Setup and Manage checklists

Passwords can only be reset through the Setup and Manage checklist page of RestaurantOwner.com. To rest a user's password, login to RestaurantOwner.com and browse to <u>http://www.restaurantowner.com/members/checklistAdmin/users.cfm</u>, and click "Users" in the top menu:



Click the username of the user whose password needs to be changed, then type the password twice in the following blanks:

Leave blank to keep exist	ing password.
Password:	Pa\$\$w0rd!
Confirm Password:	Pa\$\$w0rd!

Please note that a password must be at least 7 characters, and though it is not required, the password should include upper and lowercase letters along with numbers or symbols for extra security.

e. User Support

Support is only available to RestaurantOwner.com members and will not be provided to users or staff that have been assigned access. Users should direct all support inquiries to the RestaurantOwner.com member. For members, the discussion forum is the ONLY pipeline for support we offer for this tool. All emails or phone calls requesting support will be directed to post their request on the discussion forum.

III. Start a New Checklist

a. Completing the checklist

To complete a checklist which has already been designed through the Setup and manage checklist page of RestaurantOwner.com a user needs to login to the checklist application at http://www.restaurantowner.com/checklists/. Upon logging in with their Store ID, Username, and Password, a user can select any one of the checklists to begin filling it out:

New Started D	Done	
Checklist	Shift	Station
BOH Cleaning Checklist	Night	Dishwasher
Closing Checklist	Night	Manager
FOH Cleaning Checklist	Night	Server
Opening Checklist	Day	Manager
Log Out		

After clicking on a checklist the user will be able to view the checklist itself and begin completing each line item:

Closing Checklist			
Shift: Night	Station: Manager		
	Item	Done:	Notes:
Finan	cial		•
Pul	l Cash Drawers	*	
Fill	out Deposit Slip		
Back of House			
Cle	an Grill		
Sw	eep and Mop	v	
Sto	ock for Day Shift		
Front	of House		
Sto	ock Beverage Bar		
Che	eck Restrooms		
Continu	e Later Finished	•	

b. Saving a checklist to be completed later

Checklists can be saved in their current state to be completed later by clicking the "Continue Later" button while a user is filling out a checklist:

Continue Later	Finished

c. Finishing the Checklist

Once a user has completed a checklist, they can click the "Finished" button at the bottom to submit the checklist with the current date and time stamp. If the checklist is set to "Notify" then all appropriate users will be emailed as well.

IV. Reopen a "Started Checklist"

If a user has begun completing a checklist, and has clicked "Continue Later" the checklist will become available under the "Started" tab:

New Star	ted Done		
Checklist	Shift	Station	Started
BOH Cleaning Checklist	Night	Dishwasher	04/02/2014 02:44PM
<u>Closing</u> <u>Checklist</u>	Night	Manager	04/02/2014 04:07PM
Log Out			

On this screen any checklist which has been initiated but not completed will display, and the user will be able to click on the checklist name to continue completing the checklist. A user can start and continue a checklist as many times as is necessary, but the date and timestamp will only be logged as completed once the user clicks the "Finished" button.

V. View Completed Checklists

A user can view the checklists that have been completed with his or her account by visiting the "Done" tab:

New Star	ted Done		
Checklist	Shift	Station	Completed
<u>BOH Cleaning</u> <u>Checklist</u>	Night	Dishwasher	04/02/2014 04:20PM
<u>Closing</u> <u>Checklist</u>	Night	Manager	04/02/2014 04:16PM
<u>Opening</u> Checklist	Day	Manager	03/28/2014 12:21PM
<u>Opening</u> <u>Checklist</u>	Day	Manager	01/14/2014 03:51PM
Log Out			

The user can then click on the checklist name to view the completed checklist, but cannot modify the contents or date and timestamp of the finalized checklist.