

Operational checklist are made using Alchemy Coach and Manager to perform observations on machinery, processes, etc. Making a checklist is easy and helps ensure that your operations run smoothly. To begin crafting an observation checklist, please consult with your company's standard operating procedures or equipment documentation manuals. Once you have decided the subject for your checklist – follow these steps.



Getting Started

Only Gold Admins and higher can create observations, add users, etc. Should you need assistance, please contact your company's Alchemy Administrator or Alchemy Help for more information.

***Please contact your Alchemy Account Manager for best practices and tips on managing admin profiles, users, etc.**

Create User(s)

In Alchemy Manager, click **Users**, then **Add user**. Input the “name” of the unique equipment you want to create a checklist for. Remember, if you have multiple pieces of equipment – ensure each item is unique and can be easily identified on the production floor as well as in Alchemy Manager.

Example

Your worksite has 3 printers that need to be checked daily. In Alchemy Manager, you would need to create a unique user for each printer. Ensure that the users/equipment in Manager are uniquely identifiable and are clearly labeled at your worksite.

Create Group

In Alchemy Manager, click **Users**, then **Groups**. In the bottom right corner, click the **+** button. When naming the group, be sure that you are using your worksite's agreed naming conventions. Consider the group to only consist of equipment/processes that share the same observation checklist.

Example

Your group consist of 3 printers, located in the HR office of Worksite A. Ensure that the name of the group reflects information needed to identify items such as location, and the equipment/process needing observed.



Process

After successfully creating the user(s) and group for the equipment/process that you want observed – collect your procedures, documentation, and other items necessary to craft your observation checklist. Remember, this is specific to the user(s) you just created.

Create Observation

In Alchemy Manager, click **Activities** then **Observations**. In the top left corner, click **create new observation**. Be sure to name the observation specific to the equipment, group, process needing observed. This will be the checklist name in Alchemy Coach

Example

Create a new observation for the 3 printers, and name it **Daily HR Office Printer Diagnostics Check, Worksite A**. This title explains the equipment/process, the location, and other helpful information.

Craft Observation Checklist

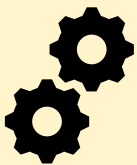
Proceed creating an observation, keeping in mind that you want this to act as a checklist. Be sure to add detailed Coach instructions. For your observation questions, you can ask the Coach to check specific components, take pictures, refer to hyperlink GMPs, and more!

Example

For the **Daily HR Office Printer Diagnostic Check, Worksite A** observation – Question #1: Inspect the printer for any physical damage. Please take a picture of the printer if damaged.

Create & Subscribe

Once you have published the observation checklist, you can create a Learning Plan and Subscribe it to the Group/User(s) you created for the checklist. This is optional – please consult your Account Manager for details. Proceed to Alchemy Coach and manually sync your device to obtain data from Alchemy Manager.



Execute

To perform the observation checklist, launch Alchemy Coach and manually sync your device to obtain data from Alchemy Manager. Search for the equipment/user(s) needing observed, and search for the observation checklist you made. Perform the observation. After submission, manually sync to ensure record retention.