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# Implementing Certainty Software

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Step-by-Step Guide

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Welcome and thank you for choosing Certainty! Certainty is used by more than 100,000 professionals worldwide to manage any checklist-based compliance, risk and performance improvement program.

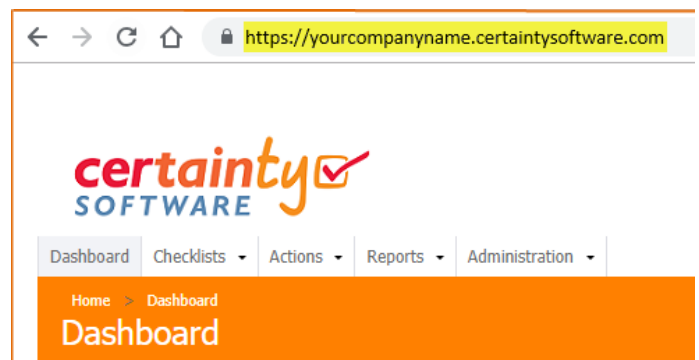
Implementing Certainty is a 6 or 7-step process - depending on whether you want printable checklists of not. The initial set-up of your project on our servers is done by our team and is normally complete in a day or two once you have completed steps 1 – 4 below.

The set up and configuration steps are as follows:

## 1) Choose Your Certainty Web Address (URL)

All instances of Certainty have their own unique web address (URL). The standard format is [yourcompanyname.certaintysoftware.com](https://yourcompanyname.certaintysoftware.com). The same format will be used for both your Reporting & Administration portal (.com) and the browser-based checklist data entry portal (.mobi).

URL's must end with **.certaintysoftware.com** (and **.certaintysoftware.mobi** for browser-based checklist data entry) but you can choose the name that precedes this.



## 2) Decide If You Want to Keep Your Trial Data

If you are moving from an existing Certainty trial, you can **choose to have your trial data migrated to your new Certainty project**. Alternatively, you can choose to start with a clean/empty database. Trial data includes all data in your Certainty trial such as checklists, completed checklist data, sites, site groups, users, notifications, etc.

## 3) Prepare Certainty Project Data Upload Template

If you would like us to bulk upload data (sites, site groups, users, user groups, etc.) into your Certainty project, we can easily do so using the *Certainty Project Data Upload Template*. This is an Excel spreadsheet and will be provided to you and you can download it [here](#). Once we have this back from you, we will upload your data into your new instance of Certainty.



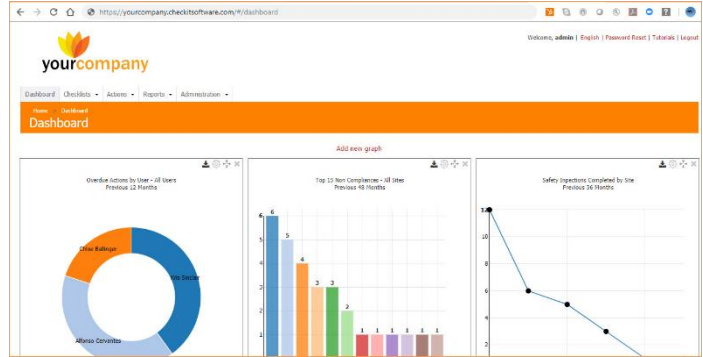
## 4) Customize your Instance (optional)

With Certainty you can customize the look and feel of your instance. Its optional (some customers do, some don't) but it does seem to help with user buy-in and participation.

If you want to customize the interface of your instance, all we need is your company logo and corporate style guide for your company colors.

## 5) System Administrator Training

Although Certainty is very easy to learn and use, to make sure you get the best results from your project we recommend at least some training for your System Administrators. **This training should be completed before you start your project and be attended by your company's Certainty Project Leads and any others who will be System Administrator(s).**



## 6) Set Up Checklists (Digital - Browser & Certainty App Checklist Submission)

Your System Administrators can create, edit and manage checklists at any time in the Certainty Reporting & Administration portal (.com URL). There you will also find user tutorials on how to use the Checklist Builder and building checklists is also covered in the System Administrator training (above).

## 7) Set Up Printable, Paper-based Checklists (optional)

If you want your team to be able to conduct audits and inspections using pen and paper, then we need to work with you to configure checklists that can be printed and read by our 'scan-to-email' - optical recognition (OCR) technology.

To do so, we need to create a Checklist Template and the subsequent printable checklists based on that template.

Once this is done, these checklists can be printed directly from Certainty and sent into your instance using any standard office scanner and the scan-to-email address provided in your **Getting Started** document along with the Certainty app download instructions, app activation code and your users' initial login credentials.

The screenshot shows a 'Demo Checklist' form with a table structure. The table has columns for 'Item', 'Status', 'Location ID', and 'Observer ID'. The 'Status' column has a dropdown menu with 'At Risk' selected. The 'Observer ID' column has a dropdown menu with 'Item 10' selected. The table has 10 rows. The form is titled 'Demo Checklist' and has a 'Print' button. At the bottom, there is a footer with the Certainty Software logo and a QR code.

The steps for setting up a paper-based Checklist Template are as follows:

- i) You send us an example of the checklist you would like to be able to print and complete on paper. The example checklist can be sent to us in Word, Excel or even drawn out by hand, scanned and emailed to us. We just need an idea of the layout and format (paper size) you want for your checklist;
- ii) We configure a mock up of the checklist and send it back to you for comments, amendments and eventually approval;
- iii) Once the layout and format have been approved by you, we then configure the checklist to work with our OCR engine and send you PDF version of it;
- iv) You scan and email a BLANK TEST checklist and scan to the email address we will provide to you. This email address will follow the same format at the URL you choose for your project i.e. [yourcompanyname@certaintysoftware.com](mailto:yourcompanyname@certaintysoftware.com);
- v) We verify that the test has been received and digitized properly by our OCR tool;

vi) Unless there are issues with the test scan and OCR calibration, your final Checklist Template and checklist(s) based on that template are added to your instance of Certainty and can be printed in *Reporting & Administration/Checklists/Print Blank Checklist*.

**Note:** A user will need access to the *Reporting & Administration (.com)* portal to be able to print blank paper-based checklists.

