checkit

Checkit Sensors Best Practice Guide (for Safety Managers)

Version 1

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Contents

1. Introduction

What is Checkit?

Checkit wireless sensors measure temperatures every 5 minutes and trigger an alert if they go out of range, so you don't need to do manual temperature checks. Depending on the type of sensor, they may be installed in fridges, freezers, and hot hold units.

Checkit Kit & Tools

You will have the following Checkit kit and tools on site:

- **Sensors**: which take temperature readings
- **The Hub**: which receives data from sensors and sends the data to the cloud every 15 minutes
- **Repeaters**: which extend the wireless signal range between sensors and the Hub, if necessary
- **The Control Centre**: a cloud portal where you can manage sensors, assigned work, alerts, team, and users, and view reports

Alerts

There are 2 types of alerts:

- **Sensor Alert:** are triggered if a sensor detects that the temperature has gone out of range for too long
- **Service Alert:** are triggered if a sensor, the Hub, or a repeater goes offline (i.e. cannot communicate with the cloud) or if a sensor has low battery

User are notified of alerts via email and they can be managed in the Control Centre.

Reports

There are 3 reports available in the Control Centre:

- **Alerts Report**: a record of all actions taken to resolve an alert
- **Monitoring Report**: a record of all sensor readings

- **Monitoring Summary Report**: a diagrammatic record of sensor readings

User Roles

There are 3 user roles. Your role will determine your responsibilities.

Users may be assigned multiple roles, to multiple locations, and to multiple teams.

- **Administrators:** are assigned to locations. They are responsible for:
    - Responding to service alerts triggered at their location
    - Managing hubs, sensors, and repeaters
    - Managing mobile devices running the Checkit App
- **Safety Managers:** are assigned to locations. They are responsible for:
    - Responding to service alerts and sensor alerts triggered at their location
    - Responding to check alerts and overdue alerts triggered at their location
    - Account configuration (users, teams, checklists, schedules, work, rules, monitoring, and advanced configuration)
- **Supervisors**: are assigned to teams. They are responsible for:
    - Completing work assigned to their team on the Checkit App
    - Responding to check alerts and overdue alerts triggered by their team
    - Responding to sensor alerts triggered by sensors assigned to their team
    - Managing users in their team

2. Onboarding New Staff

Follow the steps below when onboarding new staff to ensure they have access to the system, know what their responsibilities are, and know how to complete them.

Best Practice

- Create user accounts for new staff members when they join
- *Note*: Safety Managers can only create Safety Managers, Supervisors, and Operators. They cannot create Administrators
- *Note*: If your account uses Single Sign-On, your IT department must add users to the Checkit App in your identity provider account (e.g., Microsoft Entra, Google Workspace, Okta, etc.) before you can create the user in the Control Centre
- Use the onboarding email template below to formally communicate access, responsibilities, and required learning resources

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Email Template

Dear [**add name**],

A Checkit account has been created for you (the system we use to monitor temperature).

You are a [**Safety Manager]** of **[X location]**

[Supervisor / Operator] of **[X team]**

You can access your account at app.checkit.net

In order to learn about the Checkit system, please:

- Watch the Checkit Training Videos
- Read the Checkit Best Practice Guide
- Download the Checkit Quick-Start Guide and save it on your desktop
- Save the Checkit Help Centre link to your bookmarks

Kind regards,

3. Managing Users & Teams

Follow the steps below to ensure staff have the correct access, understand their responsibilities, and that all roles are adequately covered.

Best Practice

- Create user accounts for new staff members when they join

  Note: Safety Managers can only create Safety Managers, Supervisors, and Operators. They cannot create Administrators

  Note: If your account uses Single Sign-On, your IT department must add users to the Checkit App in your identity provider account (e.g., Microsoft Entra, Google Workspace, Okta, etc.) before you can create the user in the Control Centre

- Ensure there are enough staff assigned to each user role to maintain adequate coverage
- Ensure there are at least two Safety Managers on the system at all times
- Ensure all users watch the Checkit training videos annually. We offer a quiz to accompany our training videos so your training manager can create a Checkit module in your learning platform, assign it to staff, and track progress. Please contact us if you would like to integrate Checkit training in your learning platform
- Edit teams if staff move between teams
- Immediately delete users when staff leave

  Note: If your account uses Single Sign-On, users must also be deleted from your identity provider (e.g. Microsoft Entra, Google Workspace, Okta)

4. Alerts

Follow the steps below to ensure alerts are dealt with promptly and correctly.

Best Practice

- Ensure your organisation has an SOP in place for alert response, and ensure staff are trained on these procedures
- Respond to alerts immediately to protect stock and maintain compliance
- If you receive a service alert indicating that a sensor is offline, resolve it as soon as possible (see Sensor Troubleshooting for instructions)

  Note: If a sensor cannot send data to the cloud, data will be stored on the sensor until the device is back online. However, no sensor alerts will be triggered if the temperature goes out of range while the sensor is offline
- If you receive multiple service alerts indicating that all your sensors are offline, there is likely an issue with the Hub. See Hub Troubleshooting to resolve the problem
- If you receive a service alert indicating that a sensor has low battery:
  - If it's a Cold Sensor or Hot Sensor: ask an Administrator to replace the sensor
  - If it's a Sensor+ device: replace the battery
- If you receive a service alert indicating that a hub is offline, resolve it as soon as possible (see Hub Troubleshooting for instructions)
- If you receive a service alert indicating that a repeater is offline, resolve it as soon as possible (see Repeater Troubleshooting for instructions)
- Acknowledge alerts as you deal with the issue so that other staff are aware of its status (don't just clear the alert at the end once the issue has been resolved)
- Do not clear a sensor alert or service alert until the device has stopped alerting (i.e. is back in range/back online). The alert status field will display either the *message currently alerting* or *stopped alerting*
- Clear alerts promptly once the issue is resolved

5. Managing Monitoring

Follow the steps below to ensure monitoring is managed correctly.

Note: Only Safety Managers can manage monitoring.

Note: Follow your organisation's SOPs regarding the management of monitoring. Depending on your organisation, this may be managed centrally by head office or locally by site managers.

Best Practice

- Edit monitoring if you want to change the rule or team assigned to a sensor
- Disable monitoring if a unit is out of service and re-enable it when the unit is back in service
- Edit a rule if alert thresholds or delays need to change, for example extending the alert delay from 30 minutes to 60 minutes

  Warning: If you edit a rule, the changes will affect all sensors to which the rule is assigned. If you only want the change to affect individual or specific sensors, duplicate the rule, make the required changes to the duplicate, and assign it only to those sensors

6. When Staff Leave

Follow the steps below when staff leave to ensure their access is removed

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Best Practice

- Delete users when they leave your organisation to ensure they no longer have access to the Checkit system

  Note: If your account uses Single Sign-On, users must also be deleted from your identity provider (e.g. Microsoft Entra, Google Workspace, Okta)

7. Service Interruptions

Checkit is designed to be highly reliable and is available 99.9% of the time. However, there may be rare occasions where the system is temporarily unavailable due to either planned maintenance or unplanned outages.

Planned Outages

From time to time, scheduled maintenance may be required to maintain system performance and security. We aim to keep planned outages as infrequent and as short as possible.

- Planned outages are communicated at least 30 days in advance

Unplanned Outages

In rare cases, an unexpected outage may occur.

- You will be notified as soon as possible if an unplanned outage occurs
- Our teams will work to restore service as quickly as possible

What Happens During an Outage

Checkit has a robust architecture with redundancy built in to protect your data.

- Sensors continue to take readings as normal
- Readings are stored locally on the sensors while the cloud service is unavailable
- You can continue to view live sensor readings and monitor sensor and service alerts directly on the local Hub UI
- You will not receive alert notifications during the outage
- You may not be able to log in to the Control Centre

What Happens When Checkit Comes Back Online

Once the service is restored:

- You will be notified as soon as Checkit is back online
- You will be able to log in to the Control Centre as normal
- Alert notifications will resume
- All sensor data stored on sensors will be automatically uploaded to the cloud

- No data is lost during the outage

Best Practice

- Ensure your organisation has an SOP in place for operating during Checkit service interruptions, ensure relevant staff are trained on these procedures
- During an outage, use the local hub UI to monitor sensor readings and alerts

8. General Upkeep

Regular system upkeep helps ensure your Checkit system remains compliant and reflects current operational responsibilities.

Best Practice

- Review the alerts report regularly to check for:
    - any sensors that are frequently triggering sensor alerts as this may indicate an issue with one of your units
    - any sensors, hubs, or repeaters that are frequently triggering service alerts as this may indicate that Checkit equipment has been moved or obstructed
- Depending on your organisation, you may need to export data at set intervals. If so, export the monitoring report and alerts report at appropriate intervals and save the file to the required space
- Review user accounts to ensure access remains appropriate. Edit and delete users if necessary

  Note: If your account uses Single Sign-On, users must also be deleted from your identity provider (e.g. Microsoft Entra, Google Workspace, Okta)
- Ensure there are at least two Safety Manager registered on your account
- Ensure all users watch the Checkit training videos annually. We offer a quiz to accompany our training videos so your training manager can create a Checkit module in your learning platform, assign it to staff, and track progress. Please contact us if you would like to integrate Checkit training in your learning platform
- Ensure each team sufficient coverage to respond to sensor alerts. Edit the team if necessary

9. Recommended Optional Feature

Checkit includes optional features that can improve alert response, security, and workflow efficiency. These can be enabled on request.

Recommended Enhancements

- Alert Escalations: escalate alerts to parent locations if they are not cleared within a specified period
- Asset Intelligence: a package of 2 dashboards:
    - Asset Health & Availability: an overview of the performance of your fridges and freezers, highlighting equipment in poor health
    - Energy Saving: shows you how to save money and reduce carbon emissions by optimising the temperature of your fridges and freezers
- Machine Readable Alerts: convert alerts to a machine-readable format to integrate with your in-house/third-party systems
- Mobile Alerting: receive sensor and service alerts on the Checkit App
- Operational Insights: a dashboard which summarises the performance of your locations and teams within the last month, highlighting problems such as sensors triggering alerts and work not completed