

Inspec User Guide

ver. 2018-Apr

Form Administration

Forms Wizard

 Role Permissions Needed	
Role Value	Role Name
formAdmin	Form Administrator

The Forms Wizard will help the user create a form using basic broad steps. When the user desires to create a simple form that follows a common form type, they may use the Forms Wizard rather than the Forms Designer.

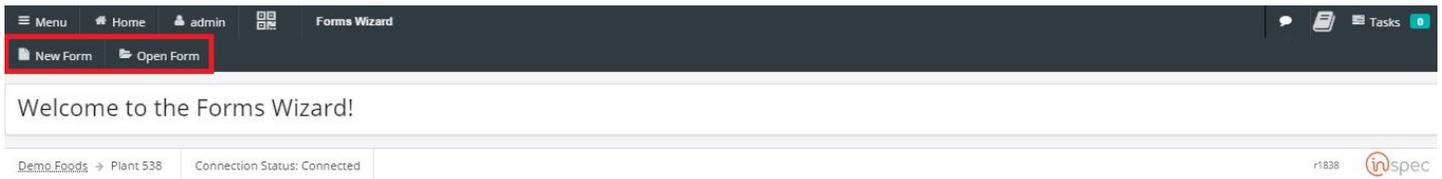
Steps-

Open <Forms Wizard> from the menu slide-out.

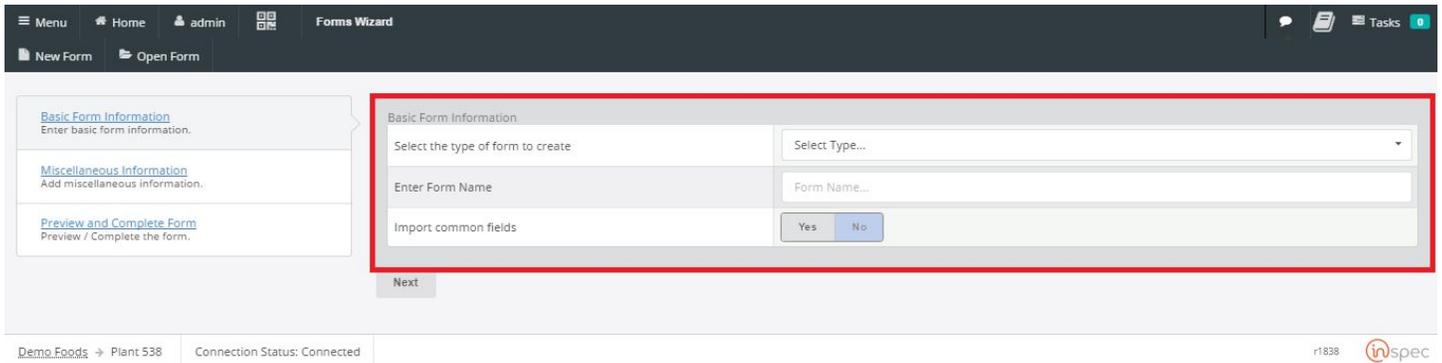
Select whether to use a new form or to open an existing form, using the <New Form> button or the <Open Form> button.

SELECTING A NEW FORM

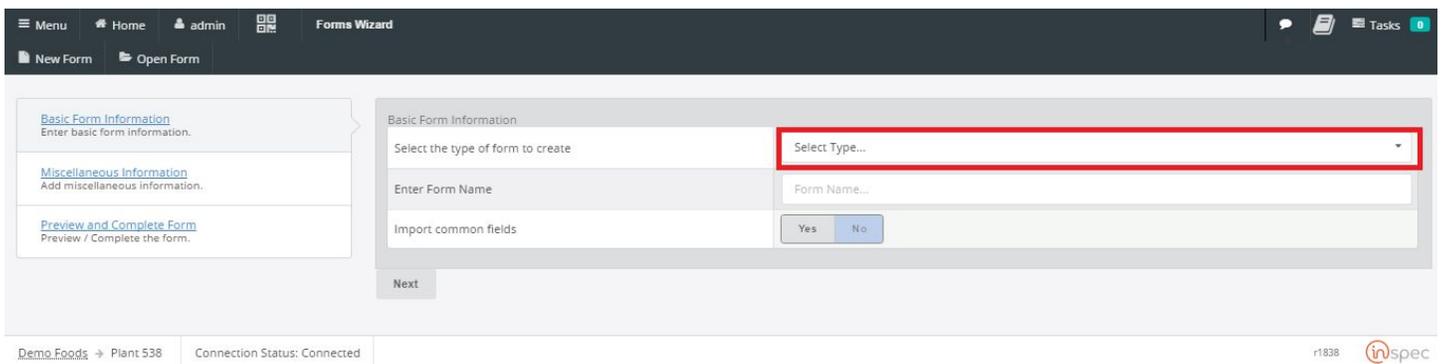
Select the <New Form> tab.



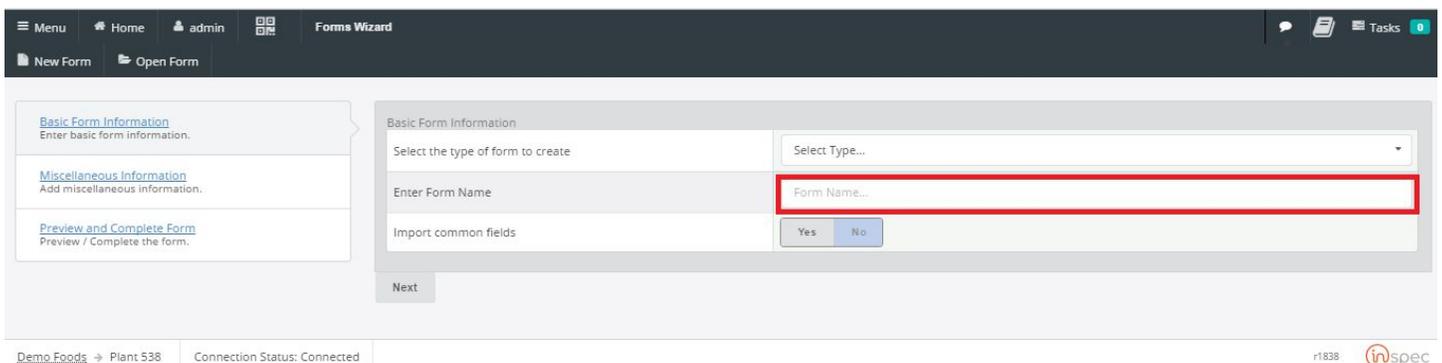
The screen will display the “Basic Form Information” prompt first.



Begin filling out the basic form information by selecting the form type desired in the < Select Type...> drop-down.



Next, enter a form name in the “Form Name” text box.



Lastly, indicate whether or not to import common fields, with the <yes> or <no> buttons.

The screenshot shows the 'Forms Wizard' interface. On the left, there are three tabs: 'Basic Form Information' (selected), 'Miscellaneous Information', and 'Preview and Complete Form'. The main area contains a form with the following fields: 'Select the type of form to create' (dropdown), 'Enter Form Name' (text input), and 'Import common fields' (checkboxes for 'Yes' and 'No'). The 'Yes' and 'No' buttons are highlighted with a red box. Below the form is a 'Next' button. The top navigation bar includes 'Menu', 'Home', 'admin', and 'Forms Wizard'. The bottom status bar shows 'Demo Foods → Plant 538', 'Connection Status: Connected', and the 'inspec' logo.

To move on from the “Basic Form Information” select <Next> below the data field.

This screenshot is identical to the previous one, but the 'Next' button at the bottom of the form is highlighted with a red box. The 'Import common fields' section is no longer highlighted.

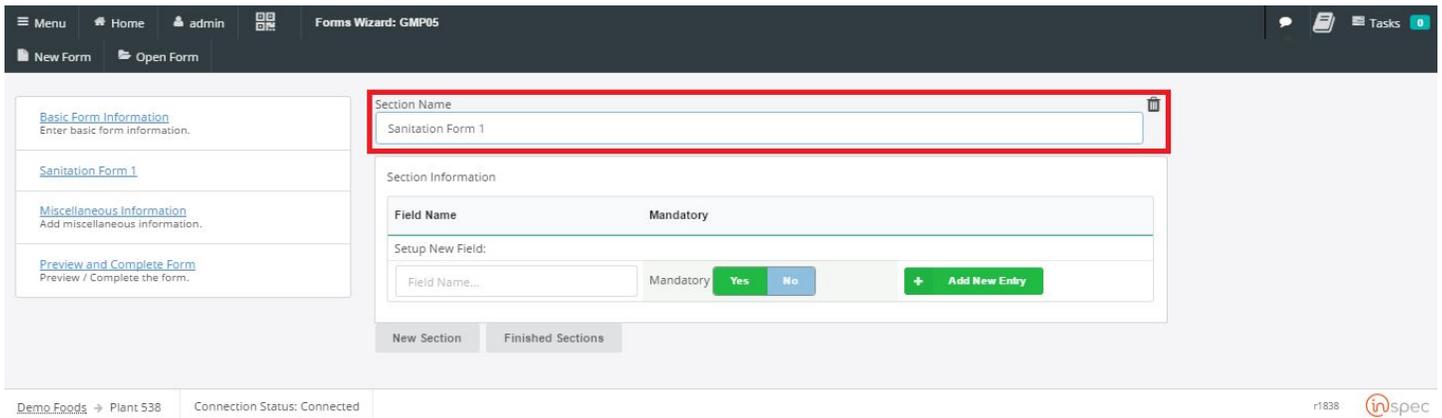
The user will now be moved to the “Section Name” section.

The screenshot shows the 'Forms Wizard' interface at the 'Section Name' step. The title bar reads 'Forms Wizard: GMP05'. The main area is dominated by a modal window titled 'Section Information' with a dark background. At the top of the modal is a text input field labeled 'Section Name' with the placeholder 'Enter Name...'. Below this is a table with the following structure:

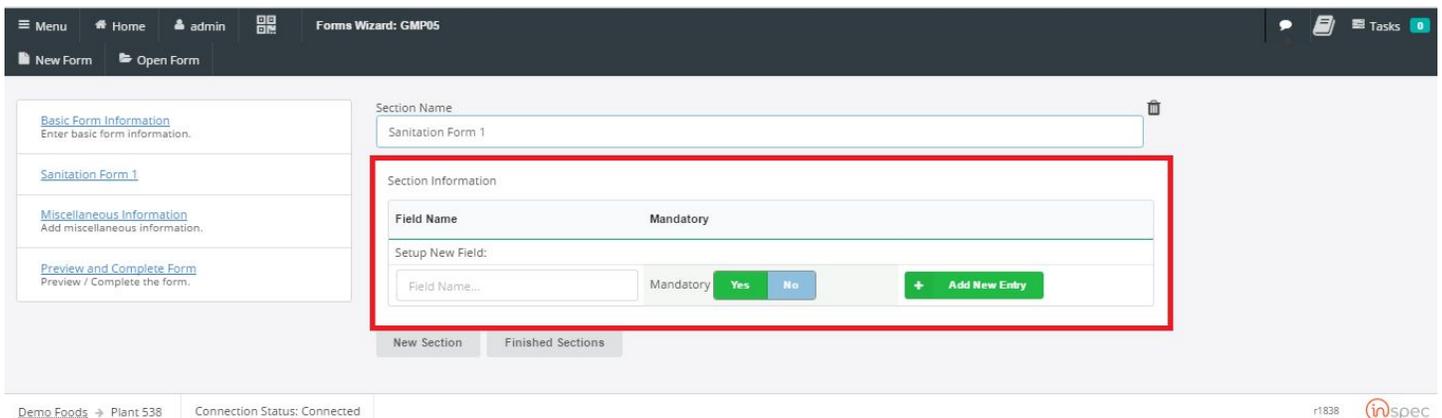
Field Name	Mandatory
Enter section name to enable section controls	
Setup New Field	
Field Name	Mandatory
	Yes No
	+
	Add New Entry

At the bottom of the modal are two buttons: 'New Section' and 'Finished Sections'. The entire modal area is highlighted with a red box. The left sidebar and top navigation bar are the same as in the previous screenshots.

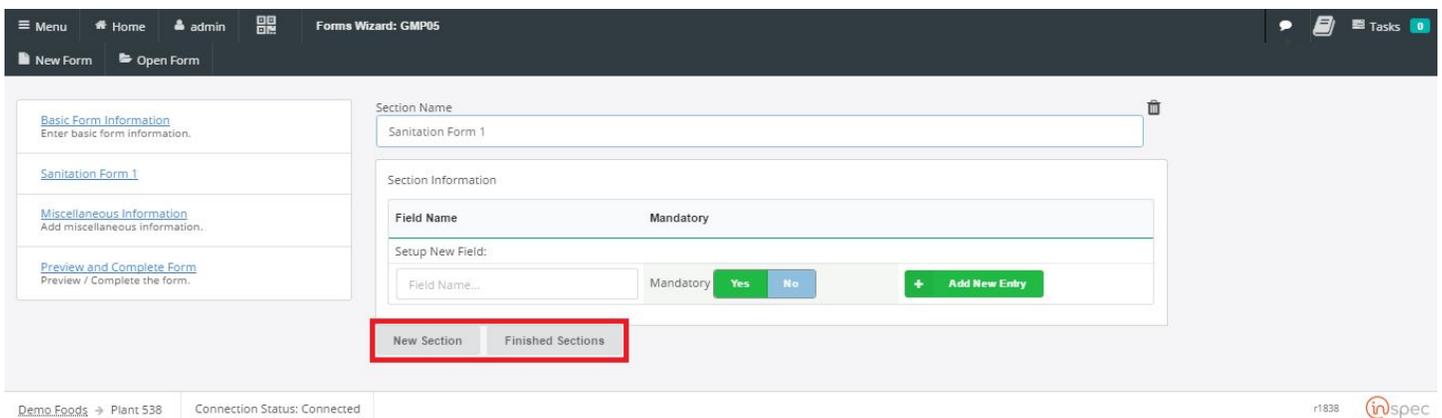
Select a section name and enter it into the text box.



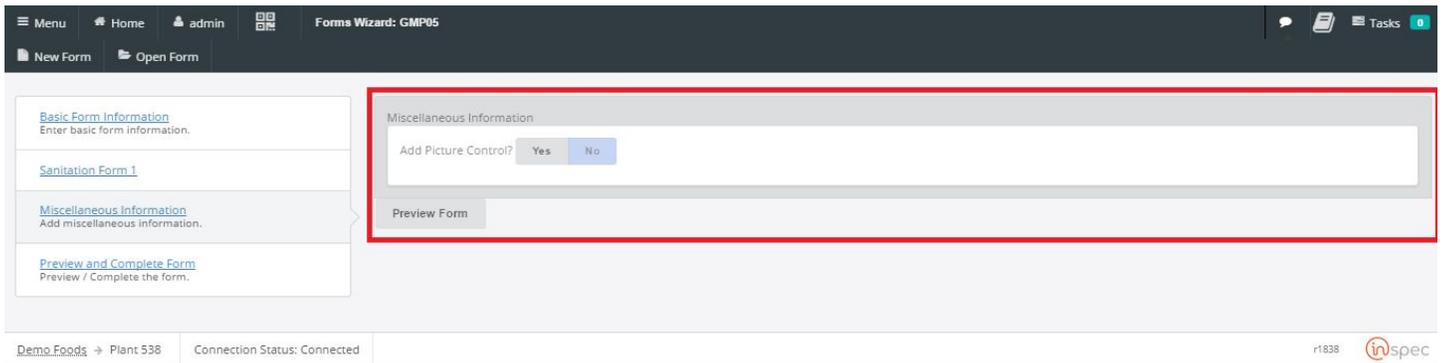
The user may now fill out the section information or move past this section, it is not mandatory.



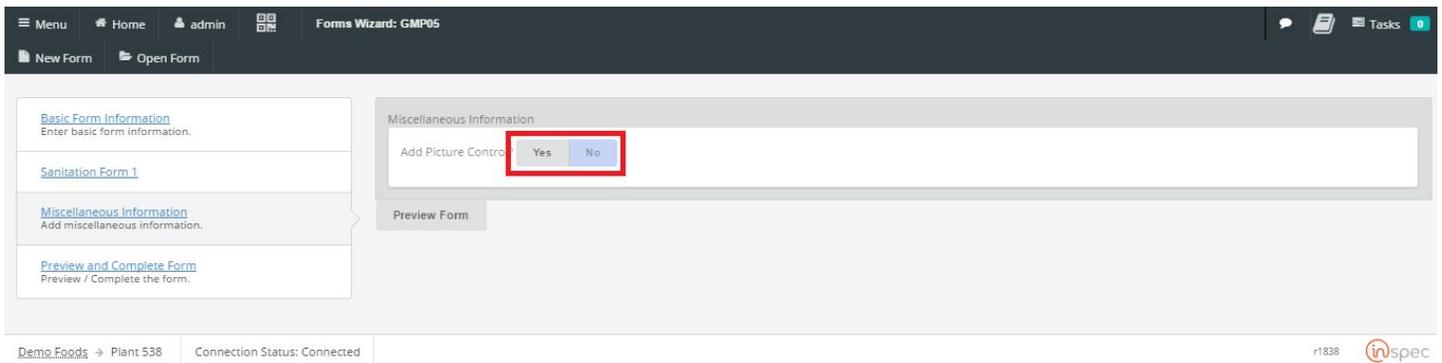
Select <Finish Sections> to move onto “Miscellaneous INformation” or select “New Section” to add a new section.



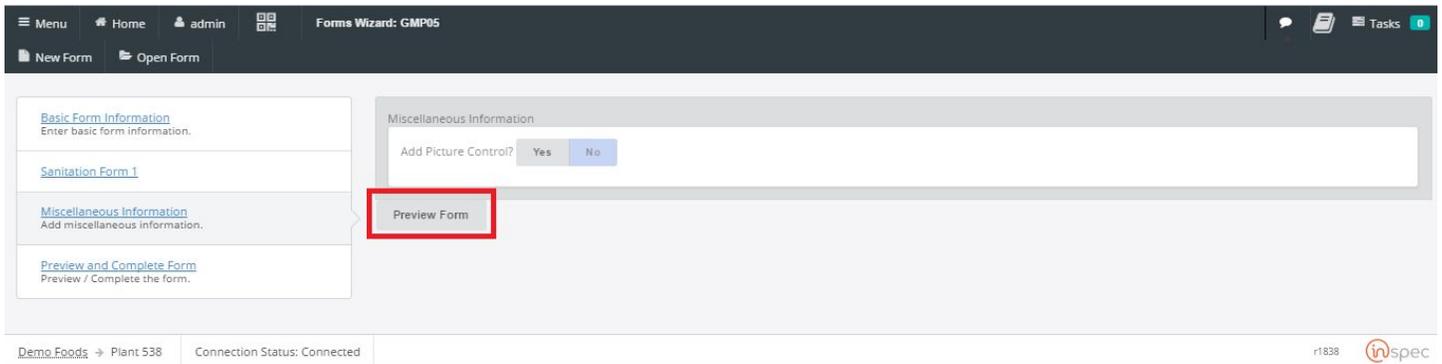
Once the user has selected “finish sections” they will be moved to the Miscellaneous information section of the Forms Wizard.

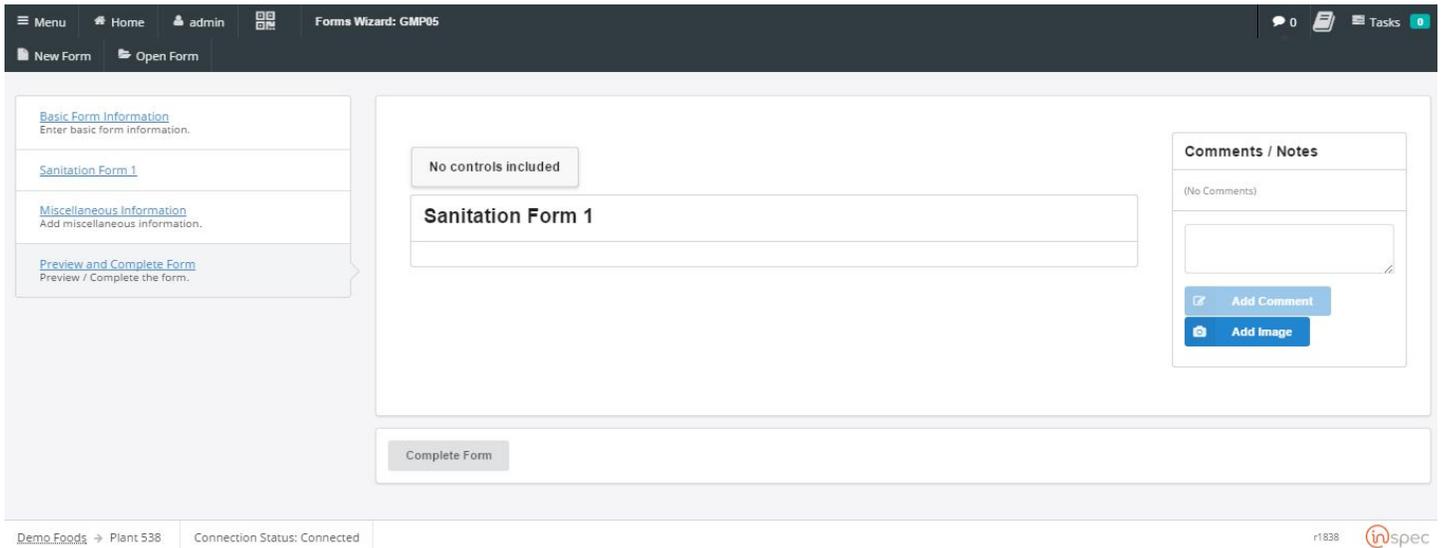


The user will be prompted whether to add a picture control or not, do this by selecting either <Yes> or <No>.

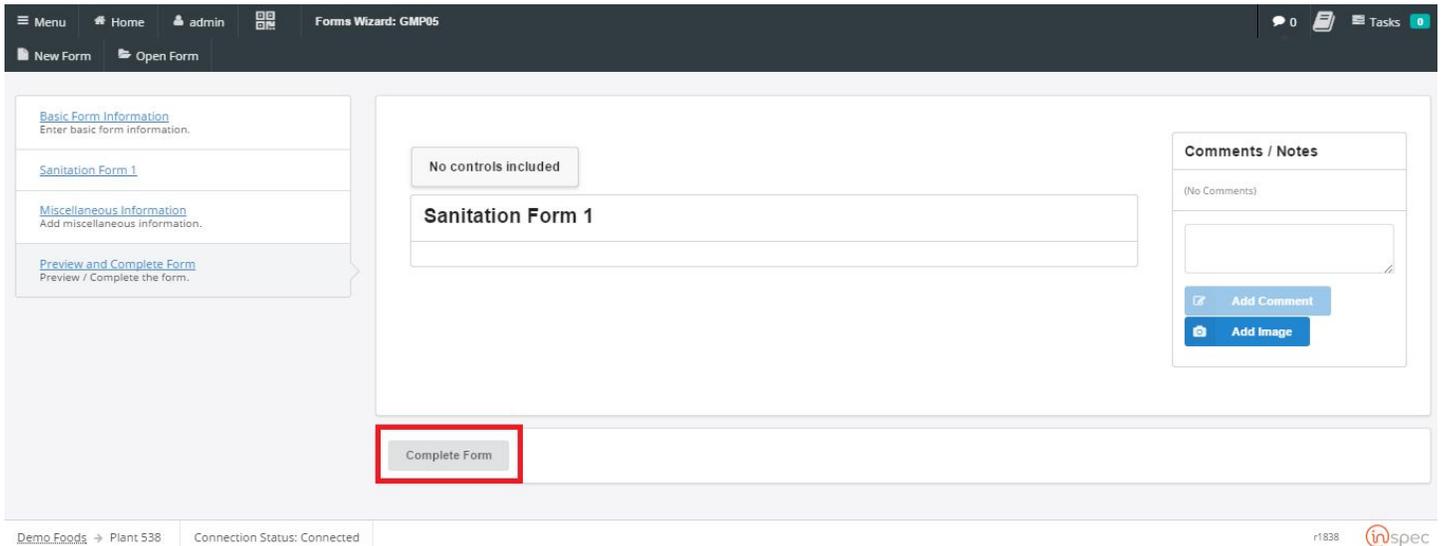


Now select <Preview Form> to see a preview of the form created.

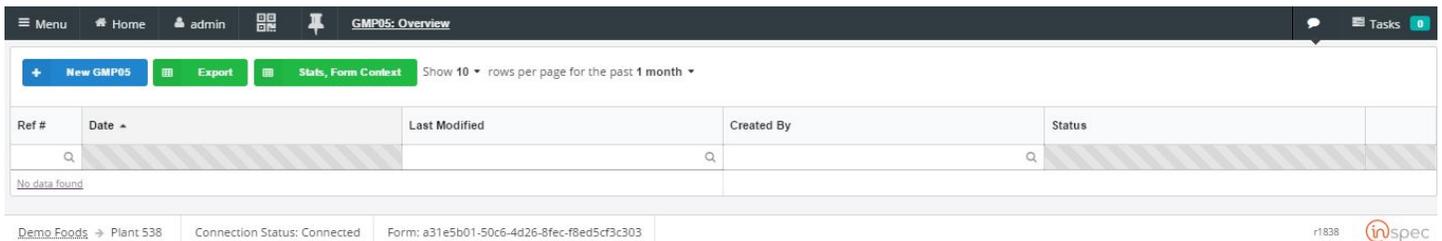




The user will now be brought to their form preview. If the user is satisfied with their form they may select <Complete Form> to move on or go back and make any necessary changes.



The user then can find their form in the menu slide-out and begin using it as intended.



Forms Designer



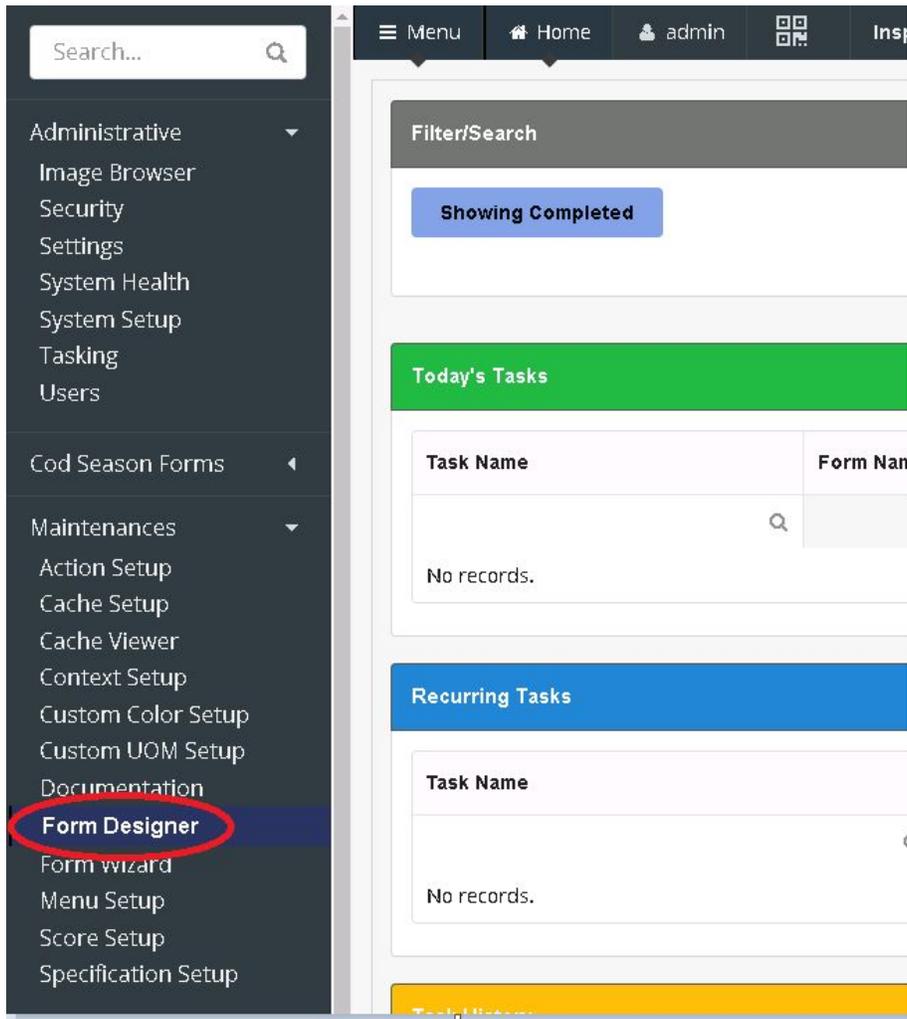
Role Permissions Needed

Role Value	Role Name
formAdmin	Form Administrator

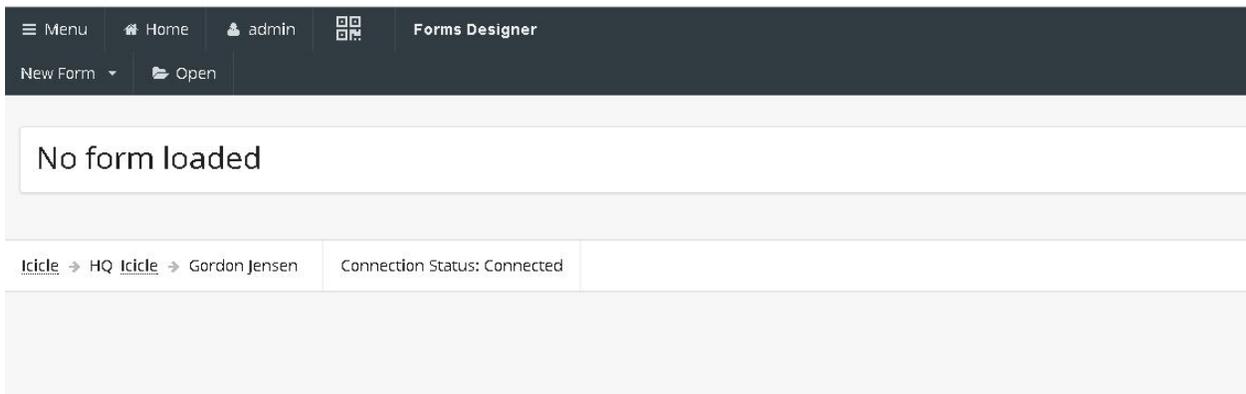
The Forms Designer is the one-stop-shop for the creation of all forms. Here a user can create a form for any general purpose/user group or specific user/purpose. The flow of commands and options for the forms designer is simple enough and can be understood with a moderate amount of time familiarizing oneself with the control possibilities. Where confusion may develop is with the function of specific control types and variables within those controls. In this section you will learn how to operate the intricacies of the forms designer, the flow of commands, the function of various control types, and variable within controls.

How to Create and Alter Forms

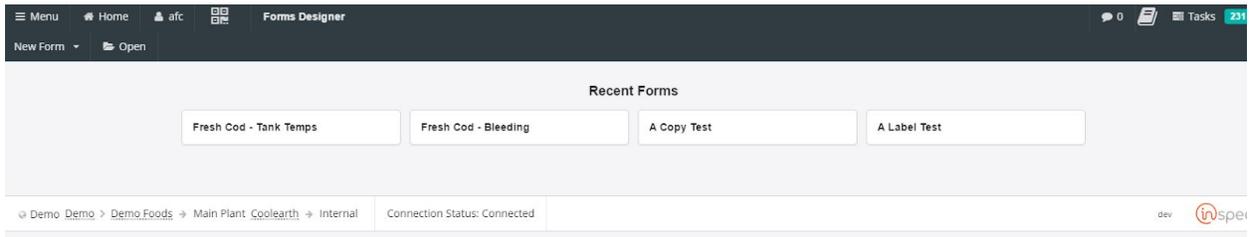
Altering forms is done in the Forms Designer. From the Main Menu, select Forms Designer in the Maintenance section.



The Form Designer will then open to the first screen. Here, you can elect to create a new form, import a form, or update an existing form.

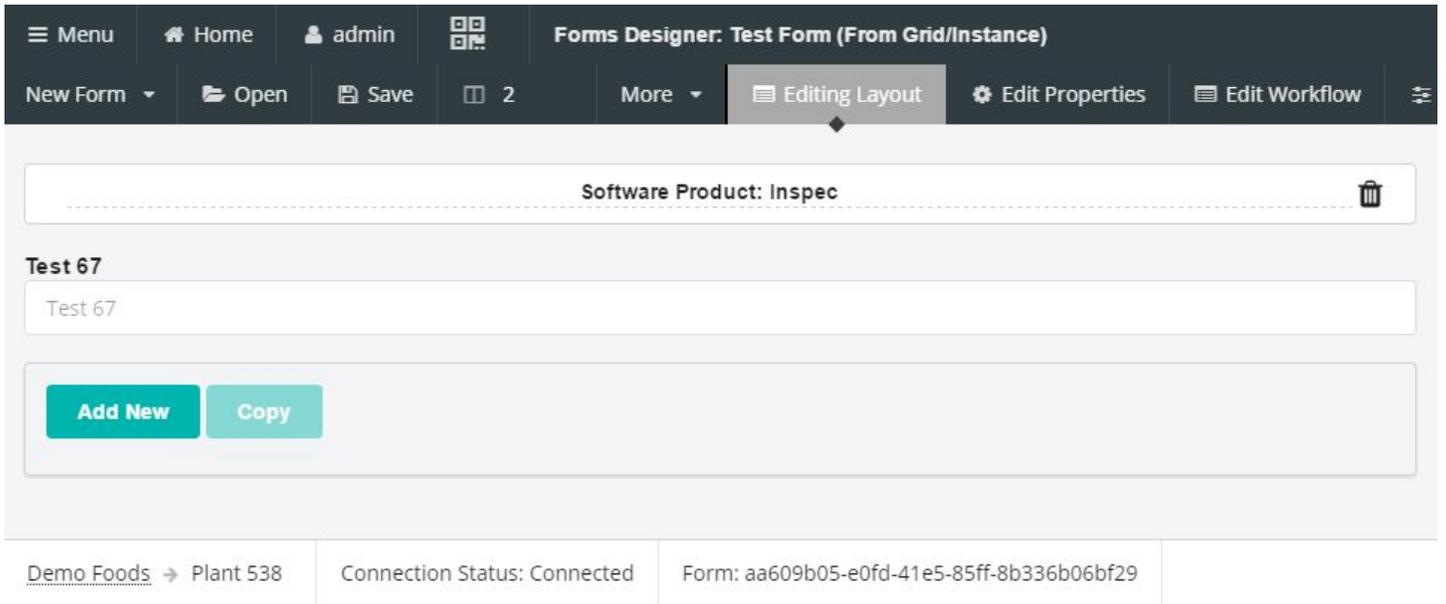
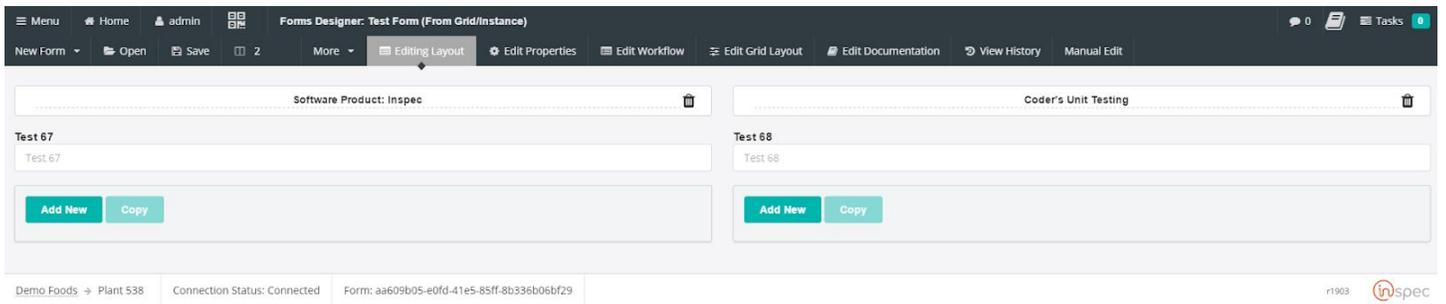


If you have worked on forms previously, the last 5 forms you have saved will show, instead of seeing "No form loaded".

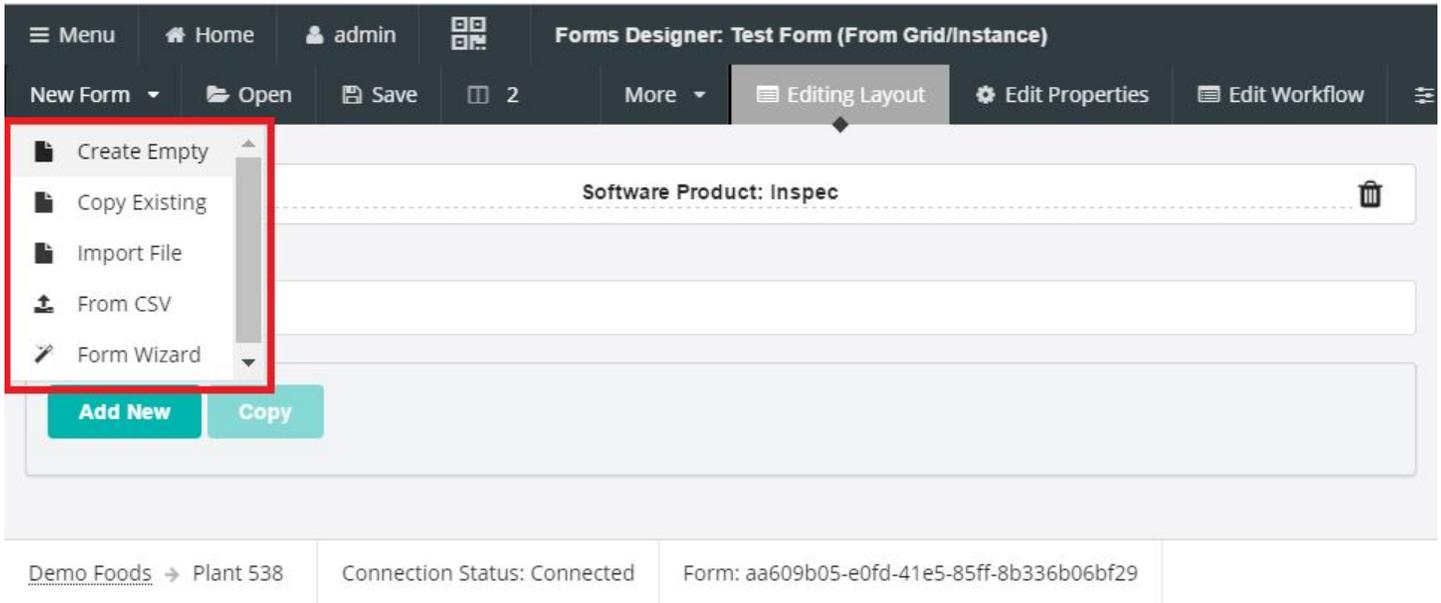


Form Designer Overview

The Form Designer has several parts: Here is a screenshot of the entire screen, close-ups to follow:



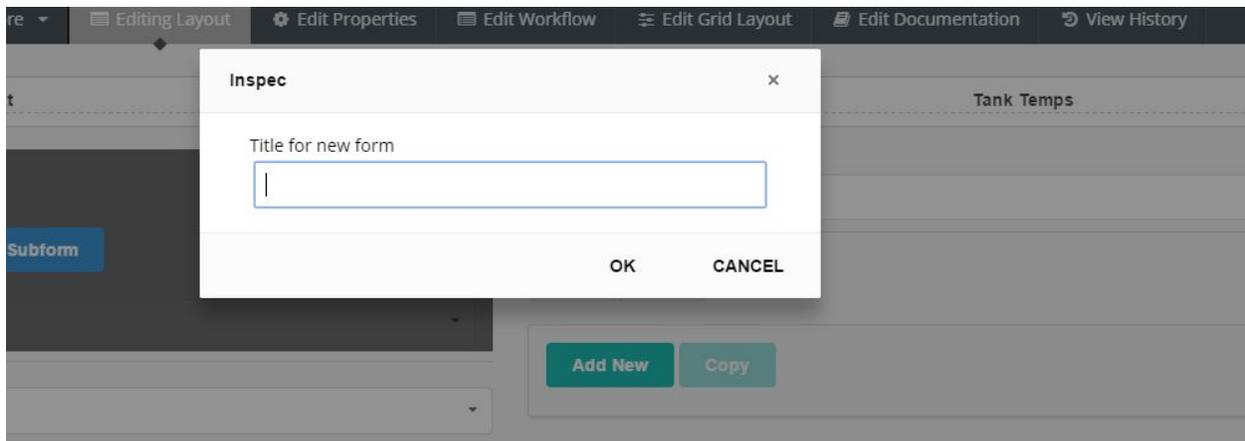
New Form



The New Form menu item allows you to create new forms in a variety of ways.

Create Empty

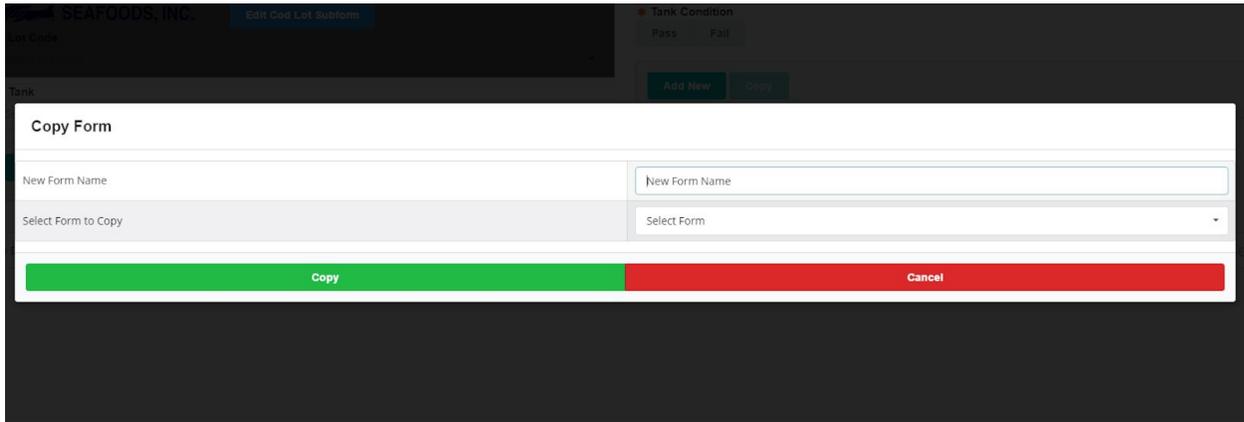
This allows you to create a completely new form. After selection Create Empty, you will see a popup dialog asking for the name of your new form. Form names must be unique within the system.



After filling in the name, the form will be created, and you will be able to add controls.

Copy Existing

This allows you to create a new form by copying an existing one. You will be taken to a screen where you enter in the name of the new form, and select the existing one to copy.



After filling out the information, press the green OK button. Inspec will create the new form, and it will be displayed to you so you can make any adjustments desired.

Import File

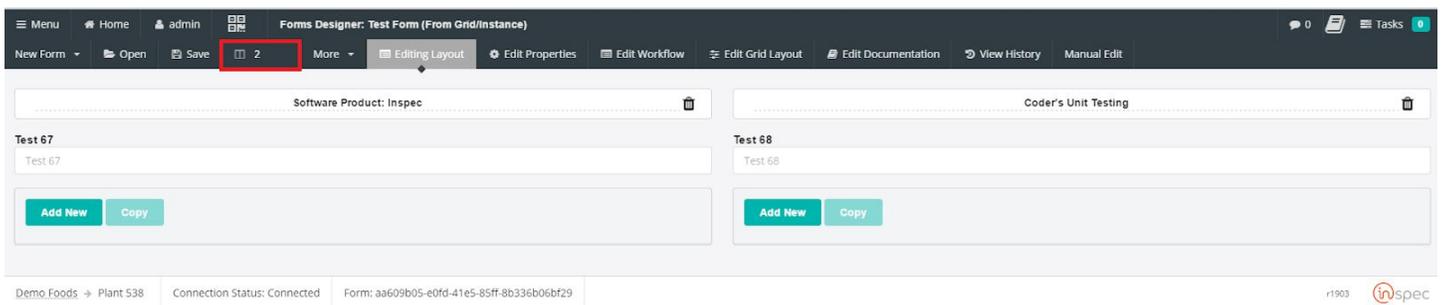
This is used when you have a JSON file containing a form. Selecting this entry will take you to a file selection dialog. Select the JSON file for your form, and press the Open button. The form will be imported. It will be given the same name as the JSON file.

From CSV

This is used when you have a CSV file containing a form. Selecting this entry will take you to a file selection dialog. Select the CSV file for your form, and press the Open button. The form will be imported. It will be given the same name as the CSV file.

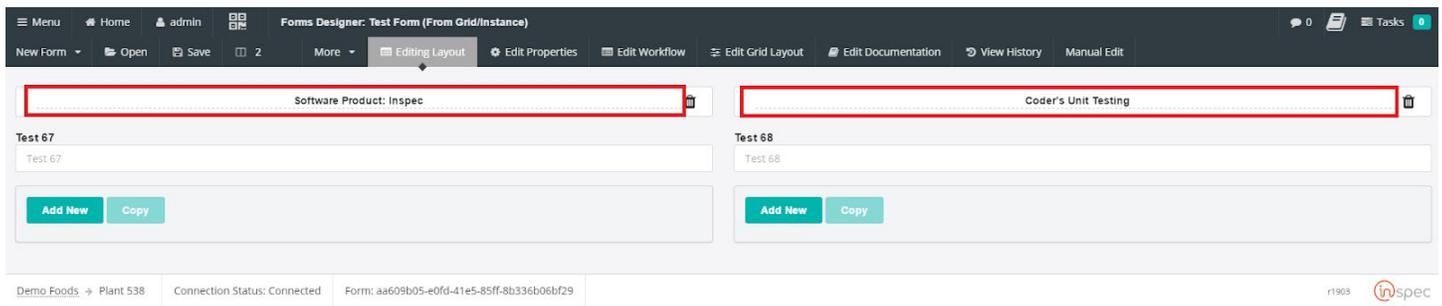
Columns

You can set the number of columns to use on your forms here.

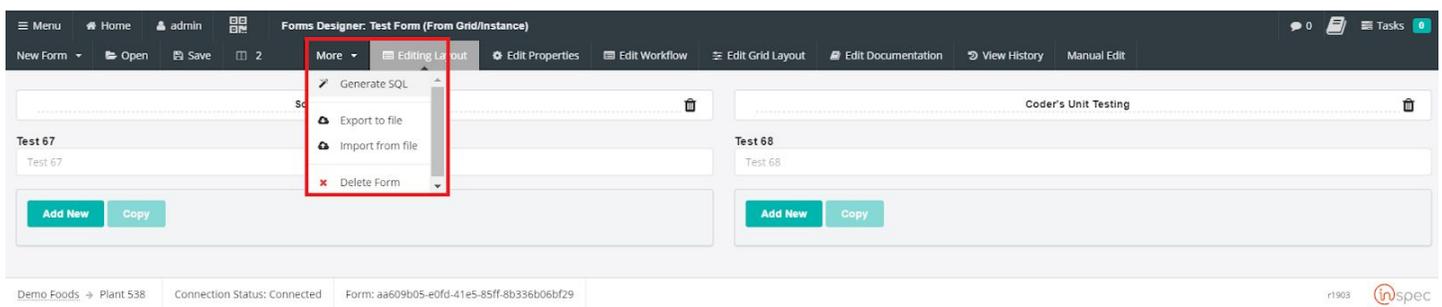


It defaults to one. You can increase the number of columns by manually editing the number, or selecting the up or down arrows next to the number.

In addition, you can name the columns by manually entering the name at the top of each column in the display.



More



The More menu has selections for working with the form. You can:

Generate SQL

Generate a script for T-SQL which will convert your SQL persistence schema to accommodate the new fields you have added. This is for when you do not have administrative access to do schema changes and need to process the change through your DBA. This update is normally done automatically by the persistence engine.

Export to File

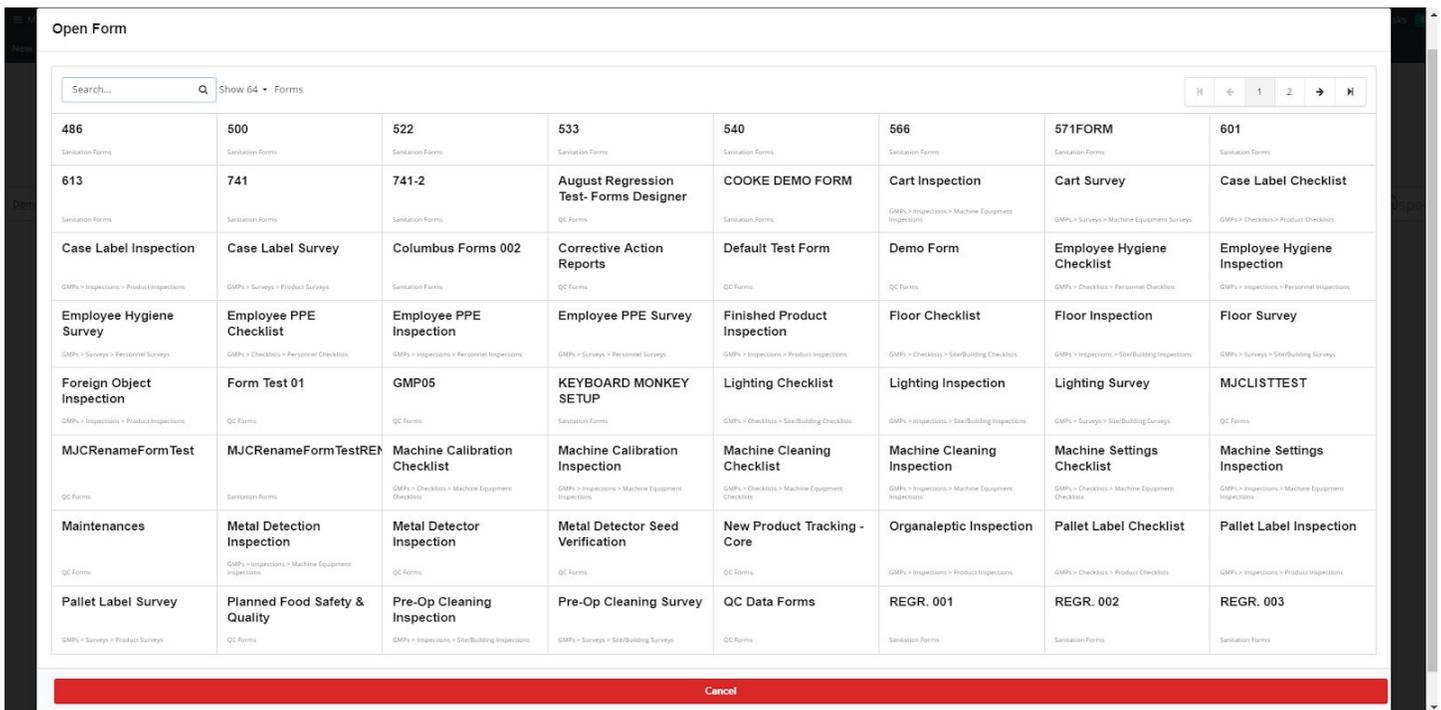
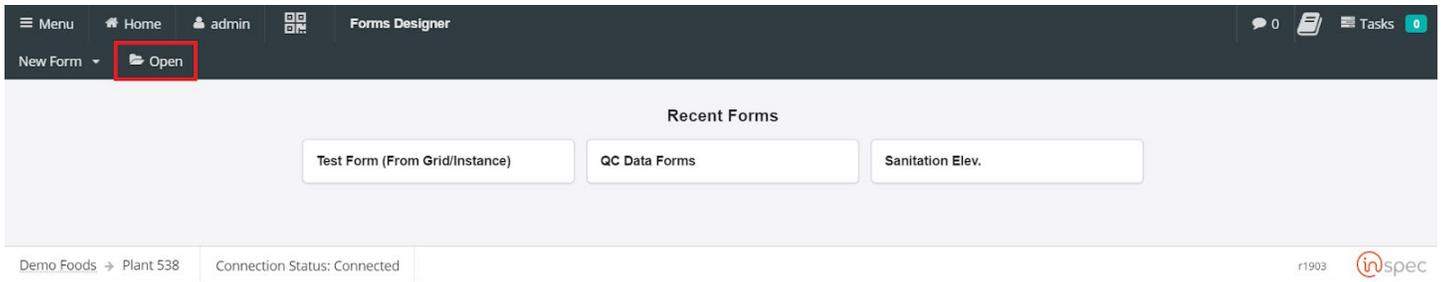
This allows you to save the open form to a JSON file.

Import from File

This does the same as Import File in the New Form menu.

Open

The Open selection will allow you to open an existing form. Pressing the Open button will show you a list of all the forms currently in the system.



Just select the form you wish to update, and double-click on it. The form will open in the Designer, and will be ready for editing.

Edit Layout

The Edit Layout tab shows you the controls on the form, and where they are located. You can make changes to the controls here.

Select<Add New Control>

Name the control.

The “Control Settings” slideout will appear to the user on the righthand side of the edit layout screen. Select the control type desired, “Text” is the defaulted control.

There are several control types to choose from, these include:

Text, Button Bar, Basic Charts, Date/Time, Digital Signature, Dropdown, Dynamic Control, Include Form, Label, List, Numeric, Pass/Fail, Picture, Quantity, Sample, Section, SPC Chart, Tally/Counter.

Each of these controls have unique sub-settings that are specific to the selected control. However, some share sub-settings. All controls share a few general sub-settings. These are as follows,

Define a legend for the control.

Define a short (“sub”) legend for the control.

Select control groups for the control.

Select a color value that the form designer wishes the form be displayed in.

Toggle <Enable> or <Disable> to make the form mandatory. When enabled, the control will have to be completed before the form can be finished.

Toggle <Enable> or <Disable> to hide the control on the table. This will hide any controls that are not required, by the user.

Toggle <Enable>, <Disable>, or <Global> to specify how to display the form header.

Text

The text control creates a typeable field that can be used, by the user, to enter information into a form.

The screenshot shows the 'Forms Designer: Sanitation Elev.' interface. The main workspace displays a 'Test Controls' form with two buttons: 'Add New Control' and 'Copy "Test Controls"'. The 'Control Settings' panel on the right is highlighted with a red box, and a red arrow points to it from the main workspace. The settings include:

Control Settings	
Name	TestControls
Type	Text
Legend	Test Controls
Short Legend	
Control Groups	
Color	White (Default)
Allow Inlining	Enable Disabled
Multiline	Enable Disabled
Number of lines	2
Placeholder	
Hide Empty Readonly	Enable Disabled
Regular Expression	
Mandatory	Enable Disabled
Hide On Table	Enable Disabled
Show Header	Enable Disabled Global

To configure the text control,

Select the text control in the “Control Type” dropdown.

Next, select any control groups that apply.

The screenshot shows the 'Forms Designer: Sanitation Elev.' interface. The 'Control Settings' panel on the right contains the following fields:

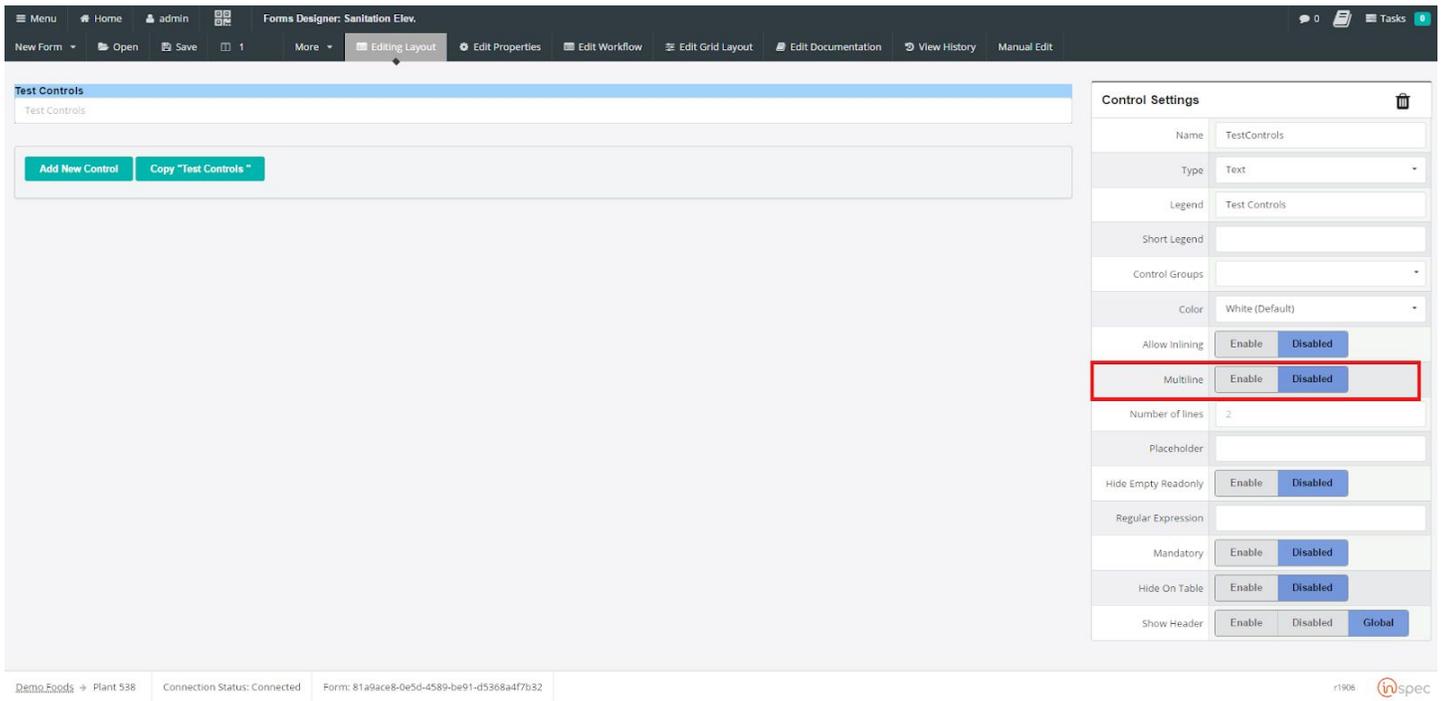
- Name: TestControls
- Type: Text
- Legend: Test Controls
- Short Legend: [Empty]
- Control Groups: [Dropdown menu, highlighted with a red box]
- Color: White (Default)
- Allow Inlining: Enable (disabled), Disabled (active)
- Multiline: Enable (disabled), Disabled (active)
- Number of lines: 2
- Placeholder: [Empty]
- Hide Empty Readonly: Enable (disabled), Disabled (active)
- Regular Expression: [Empty]
- Mandatory: Enable (disabled), Disabled (active)
- Hide On Table: Enable (disabled), Disabled (active)
- Show Header: Enable (disabled), Disabled (active), Global (active)

Below the 'Control Groups' dropdown, a tooltip states: "This lets you group controls together so actions and other parts of the system can refer to the group in bulk and not need to be manually duplicated or maintained for each control. A control can be in multiple groups."

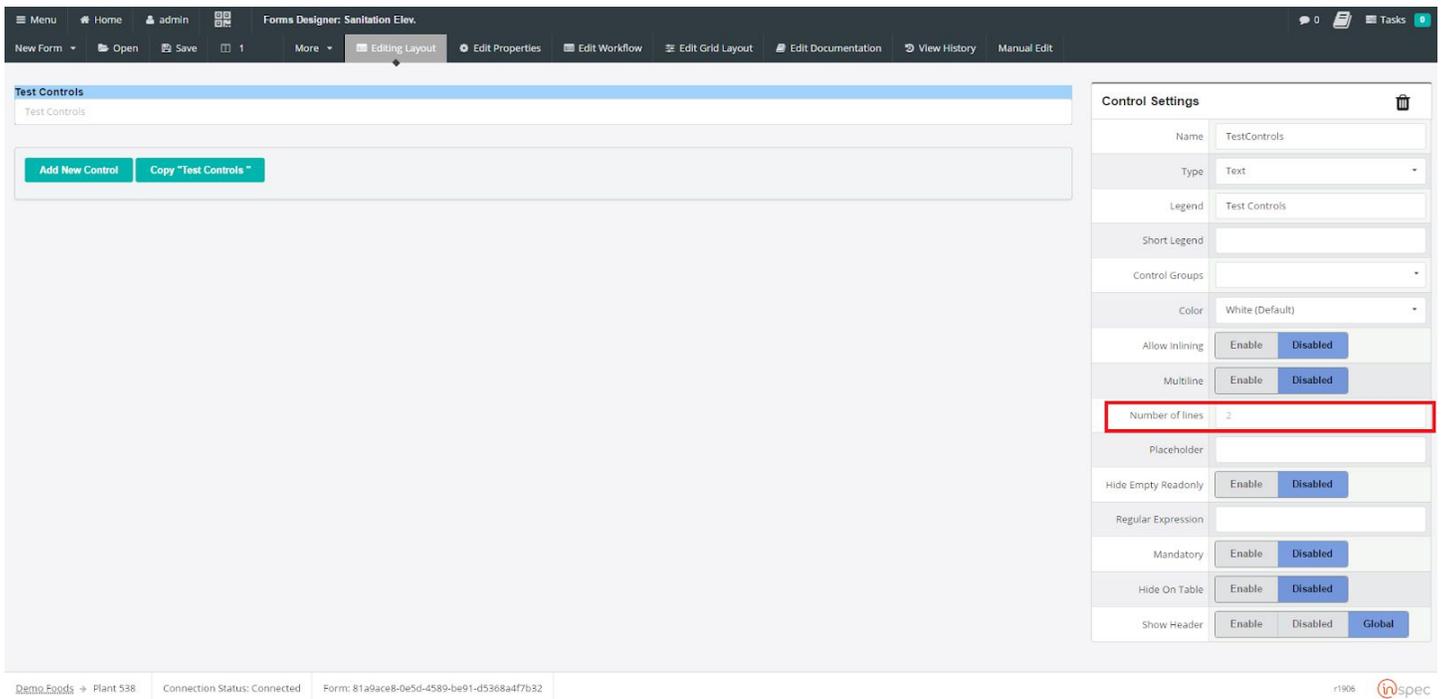
Toggle <Enable> or <Disable> to specify whether to allow inlining.

This screenshot is similar to the previous one, but the 'Allow Inlining' toggle is highlighted with a red box. The 'Enable' button is now active (blue), and the 'Disabled' button is disabled (grey).

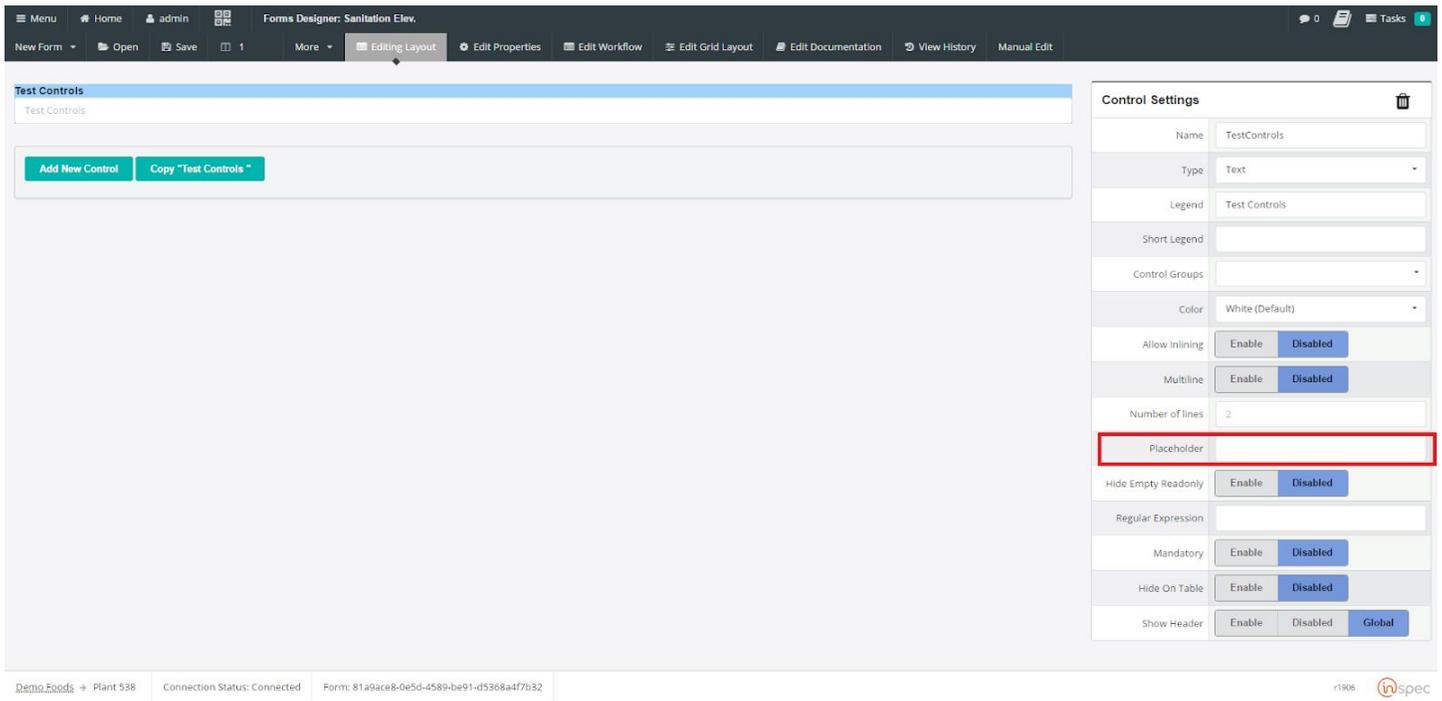
Then, toggle <Enable> or <Disable> to specify whether to allow multiple lines.



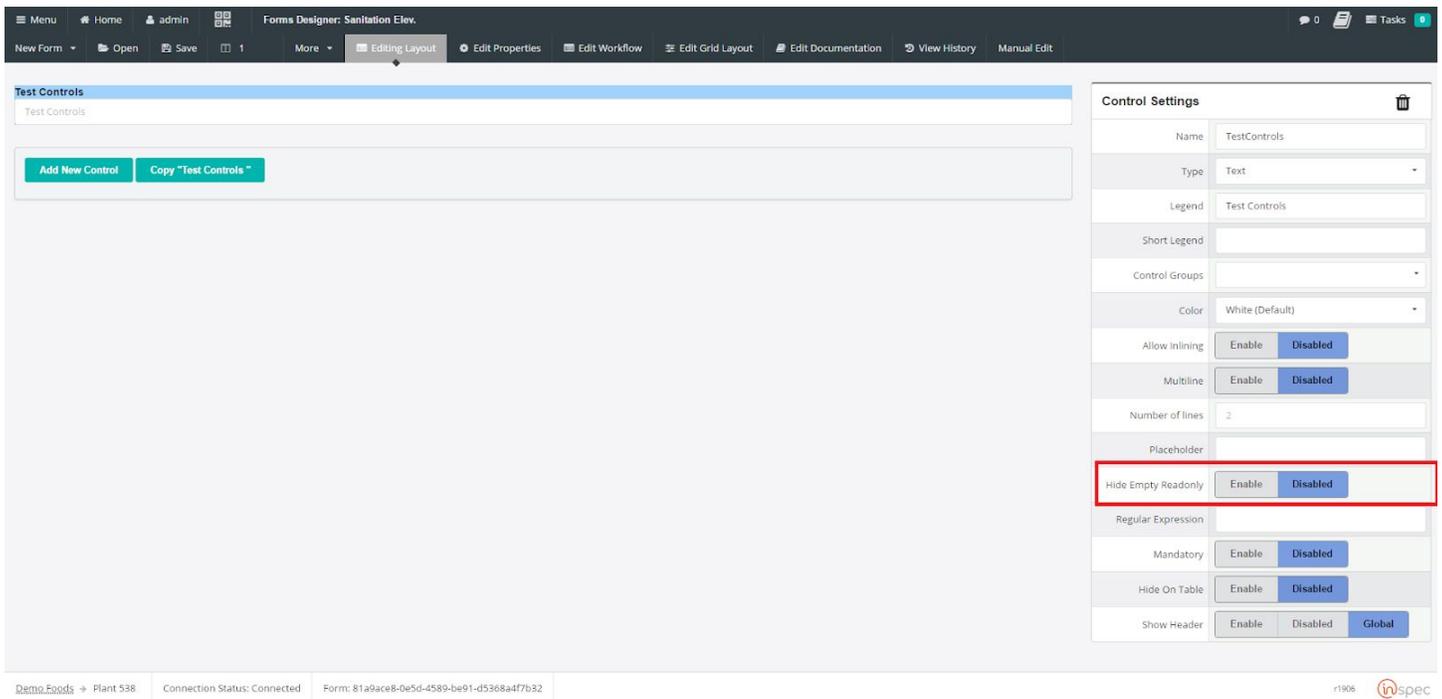
Specify the number of lines desired, using the numerical field.



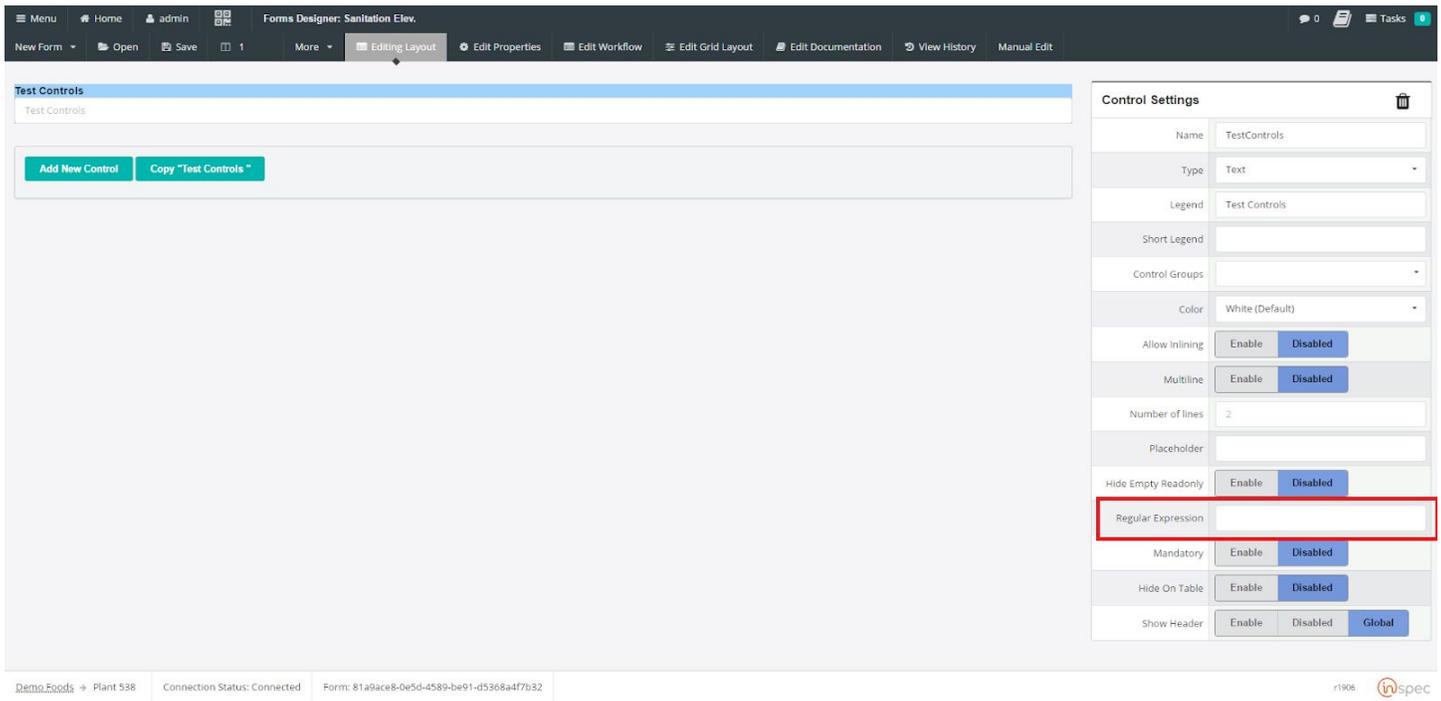
Enter a text type value, desired by the user, into the placeholder field to act as a placeholder in the control.



Toggle <Enable> or <Disable> to specify whether to hide the field if it is left empty by the user.

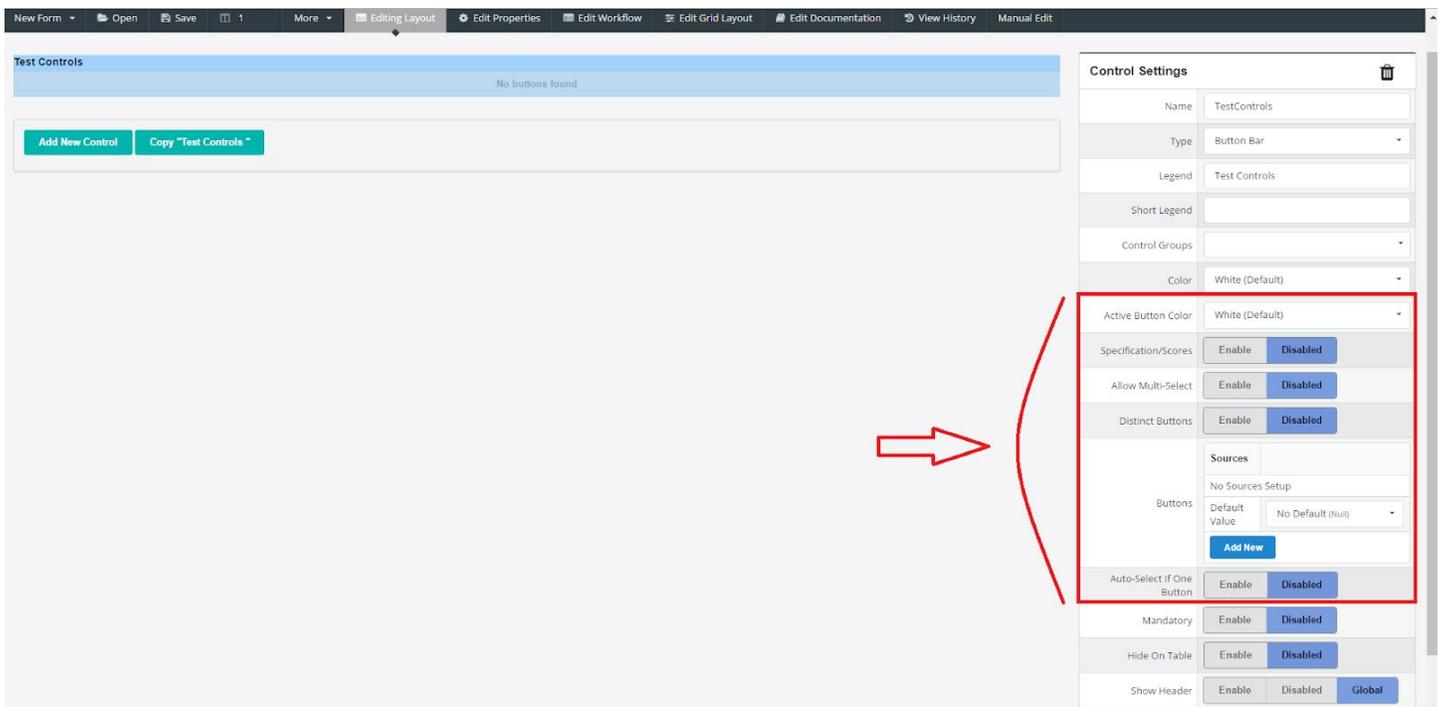


Enter any text to be left as a regular expression.



Button Bar

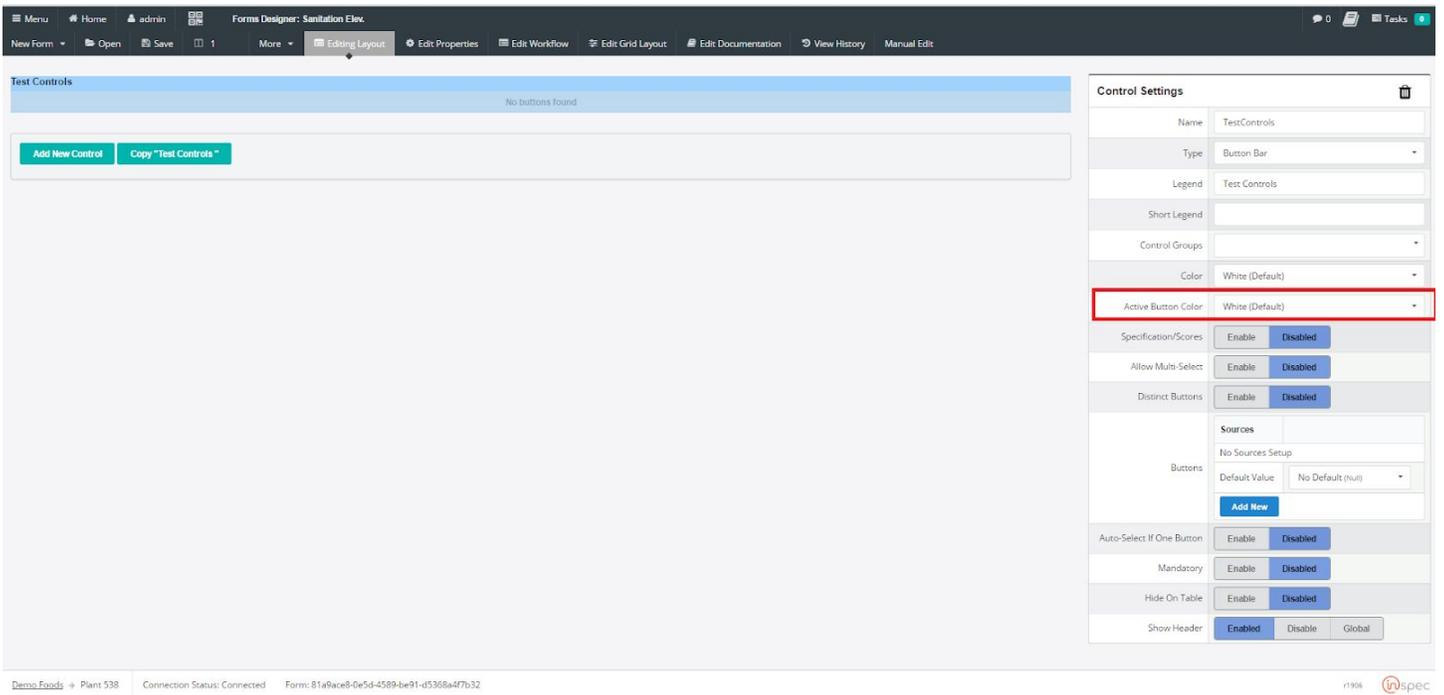
The Button Bar creates a toggleable subcontrol that will perform a set action when selected by the user responsible for completing the form.



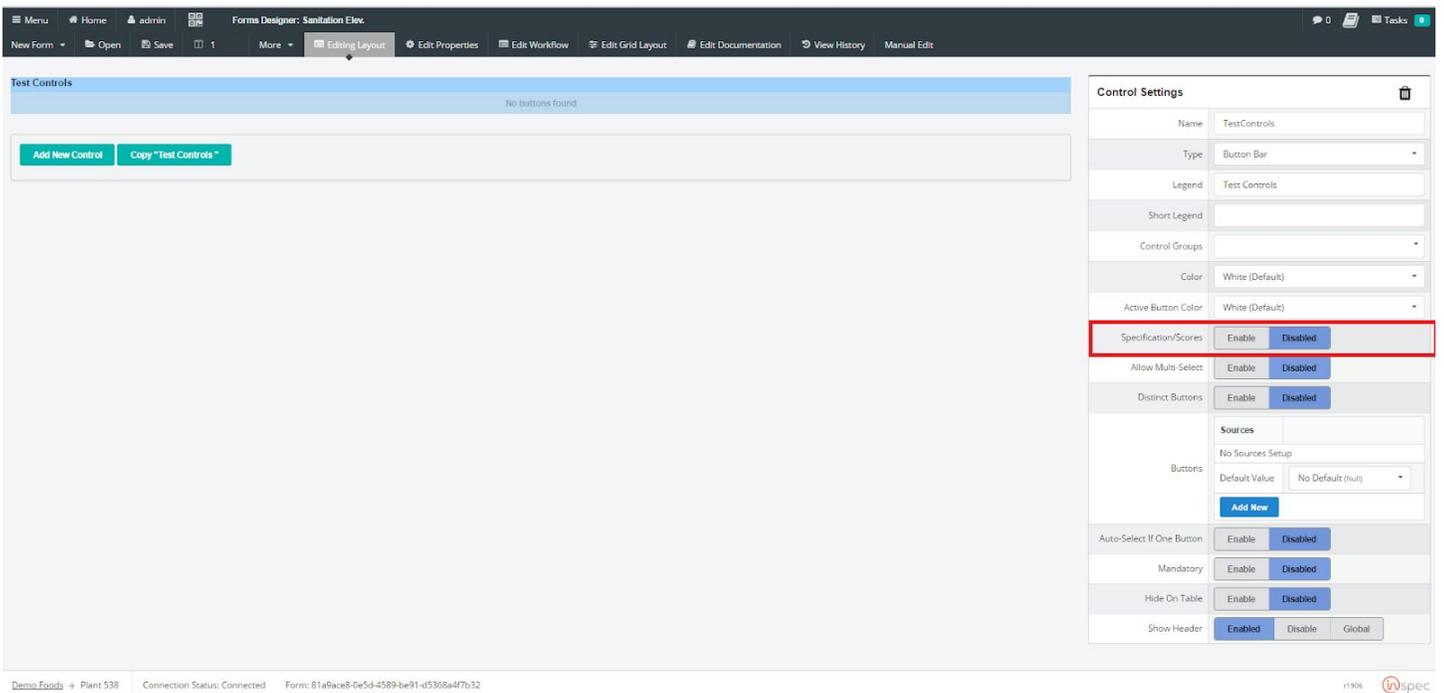
To configure the Button Bar control,

Select the Button Bar control in the "Control Type" dropdown.

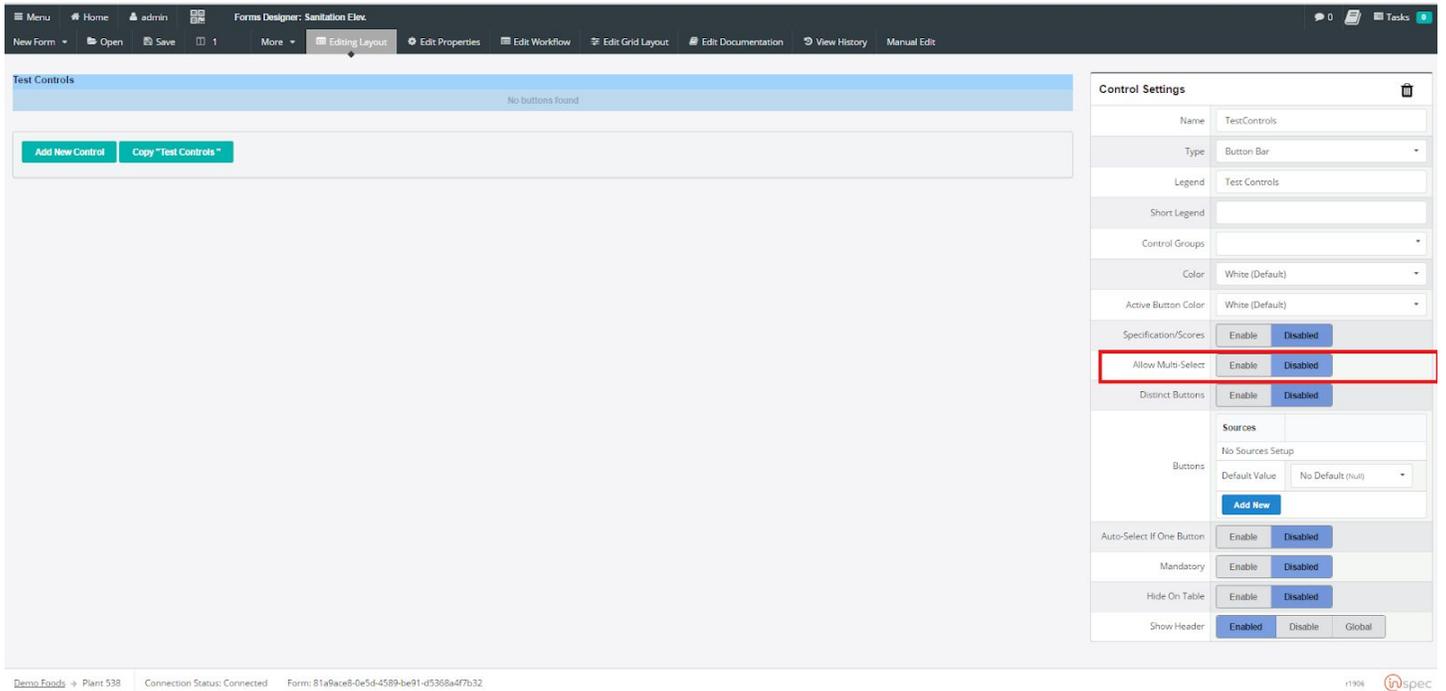
Next, select and active button color. This color will flash when the button is activated.



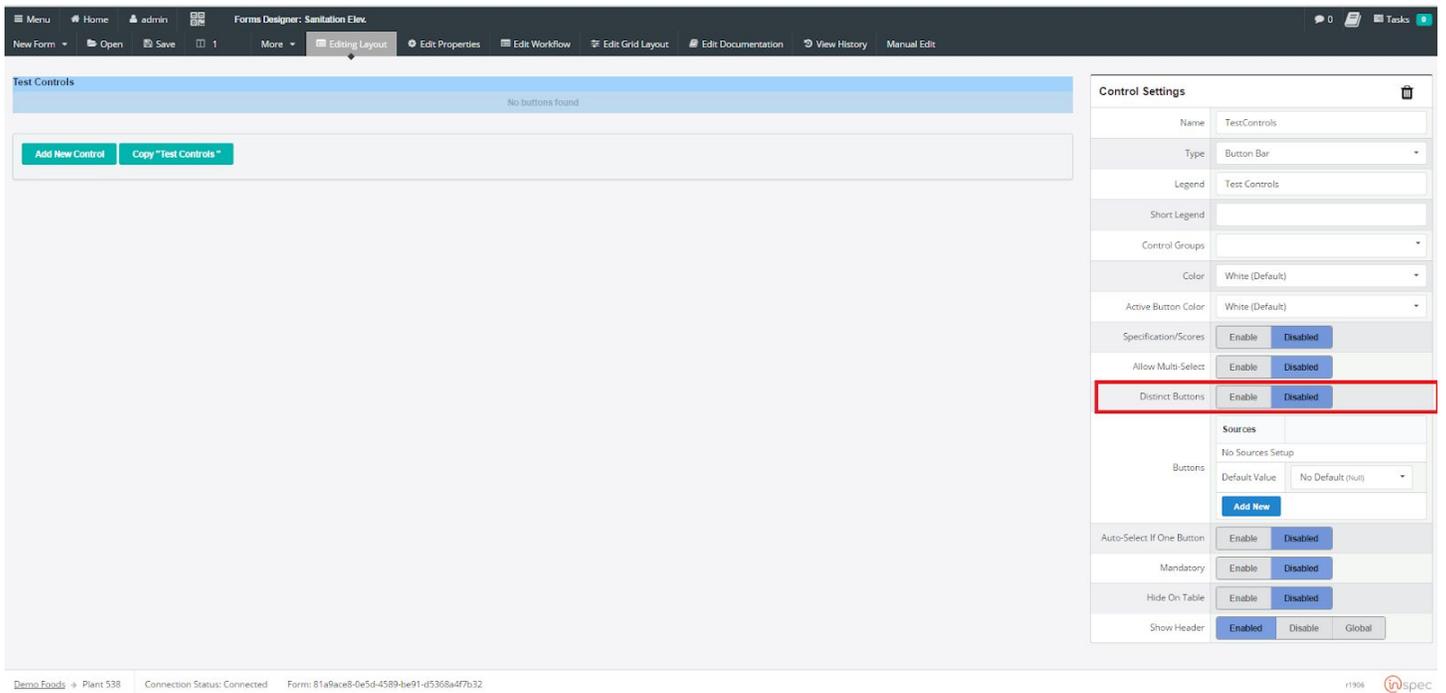
Toggle <Enable> or <Disable> to specify whether to allow Specifications/Scores.



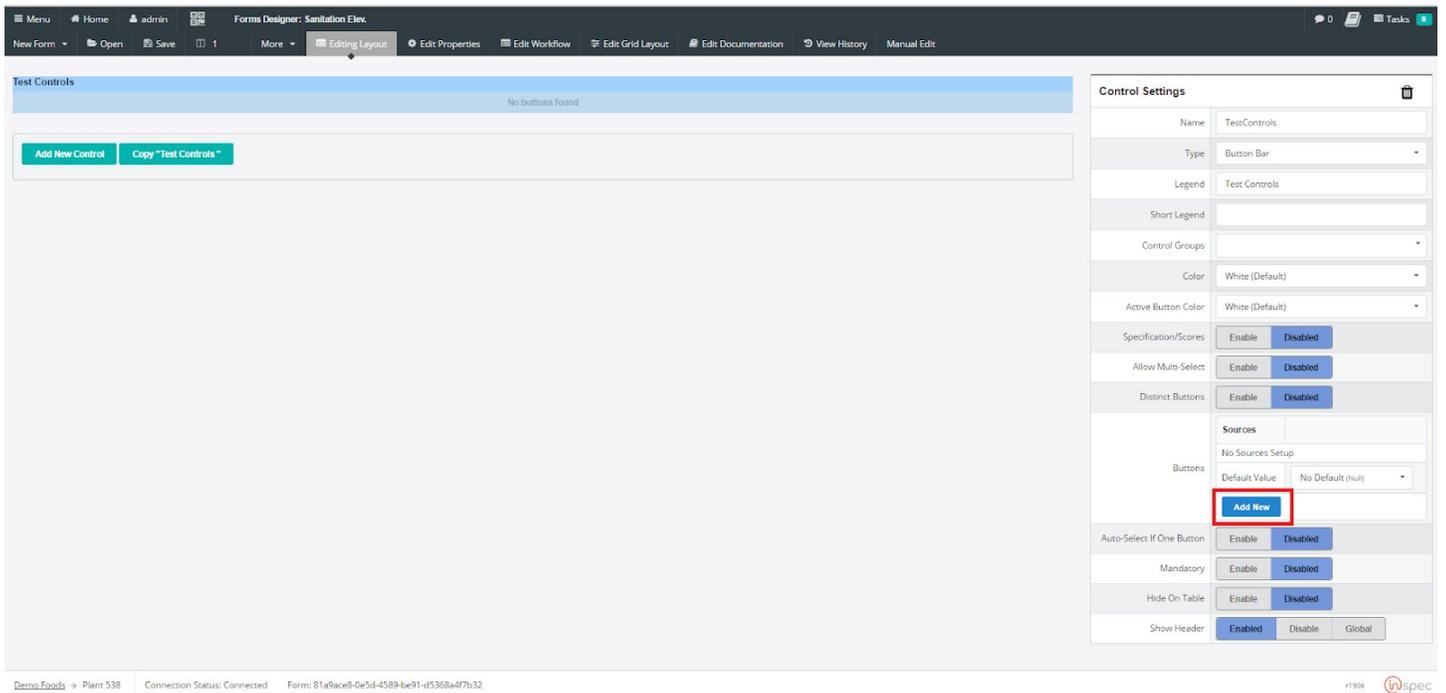
Toggle <Enable> or <Disable> to specify whether to allow the user to select multiple buttons in the same bar.



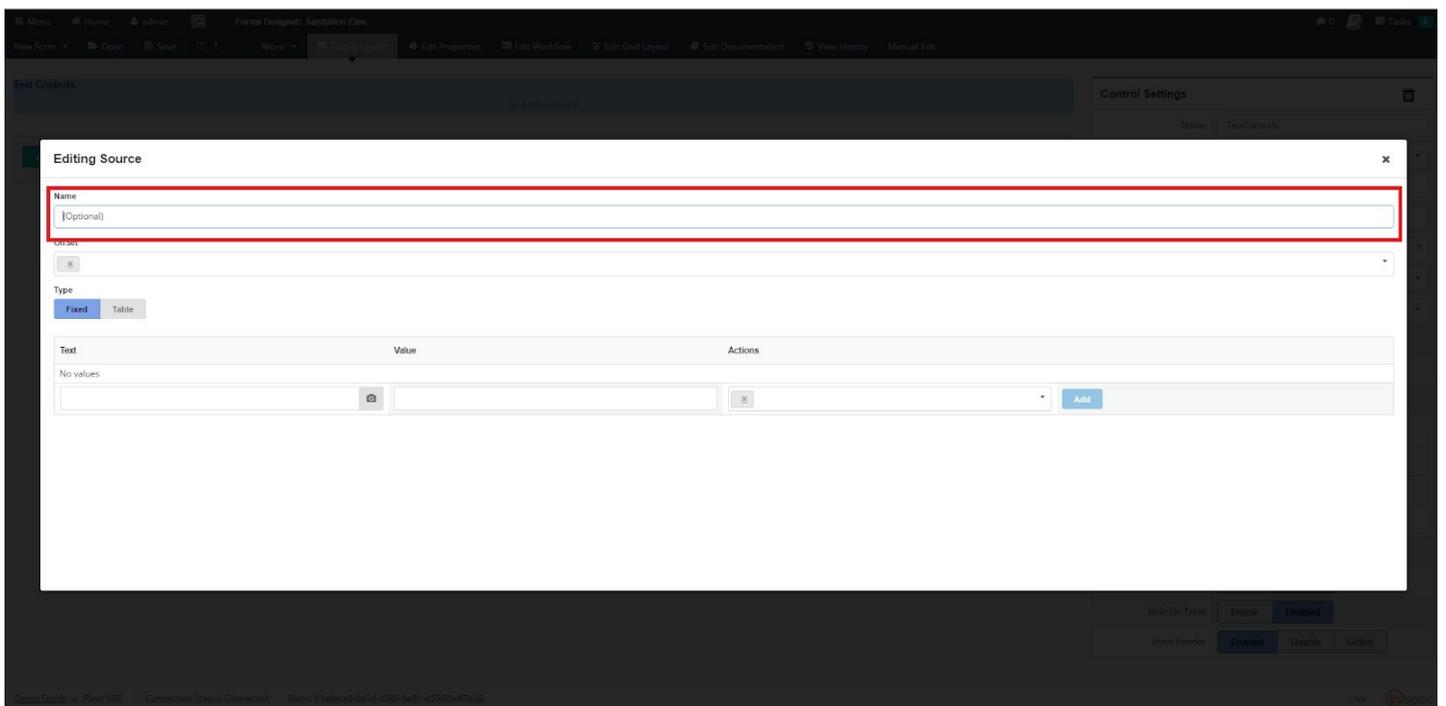
Toggle <Enable> or <Disable> to specify whether to allow distinct buttons.

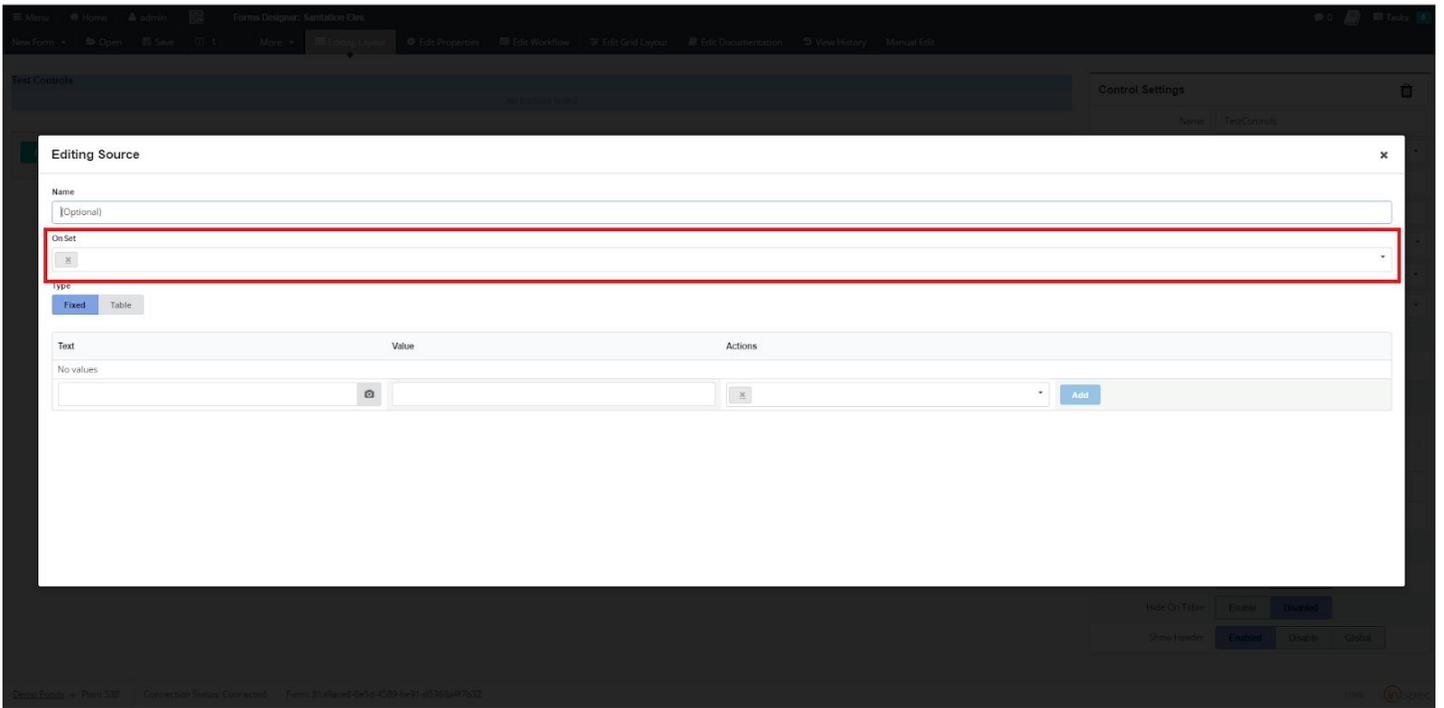


To create a button, in the Button Bar, select "Add New".

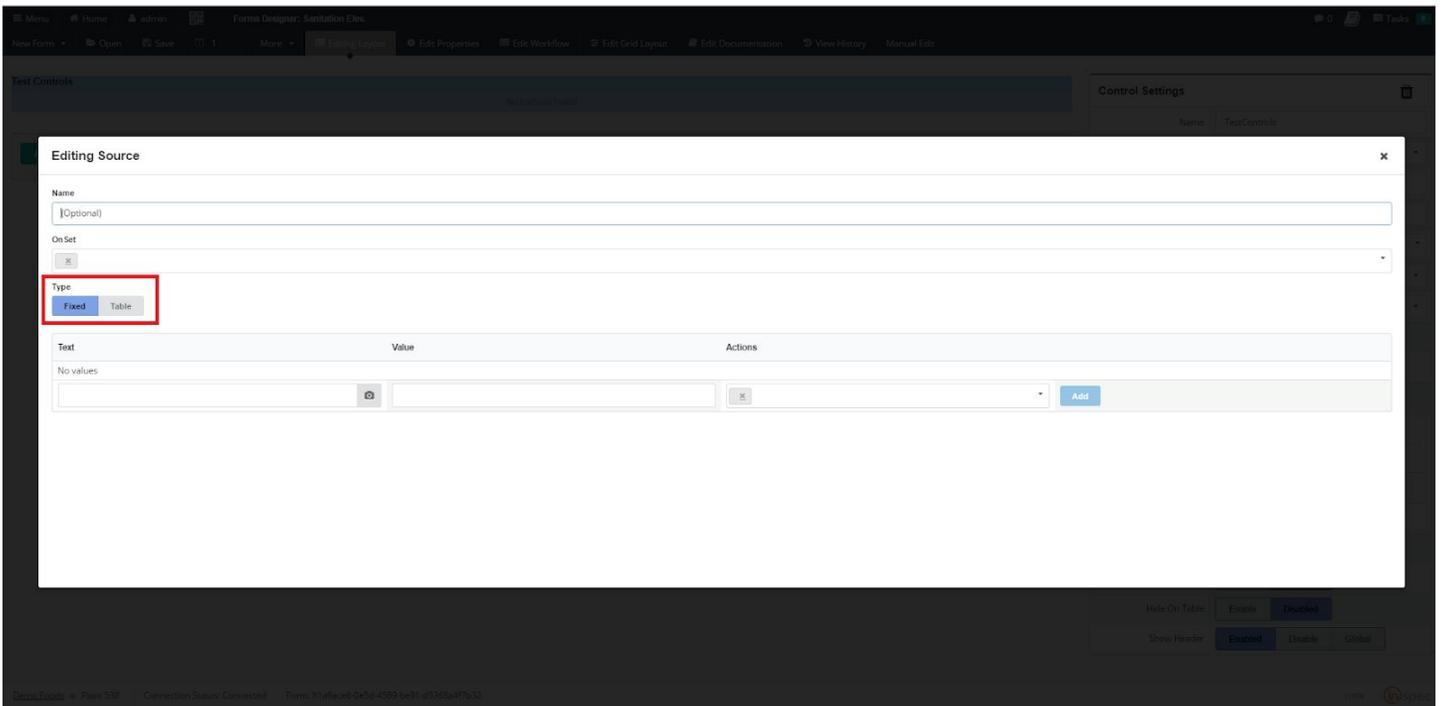


Next, name the button and select an onset role, from the dropdown.

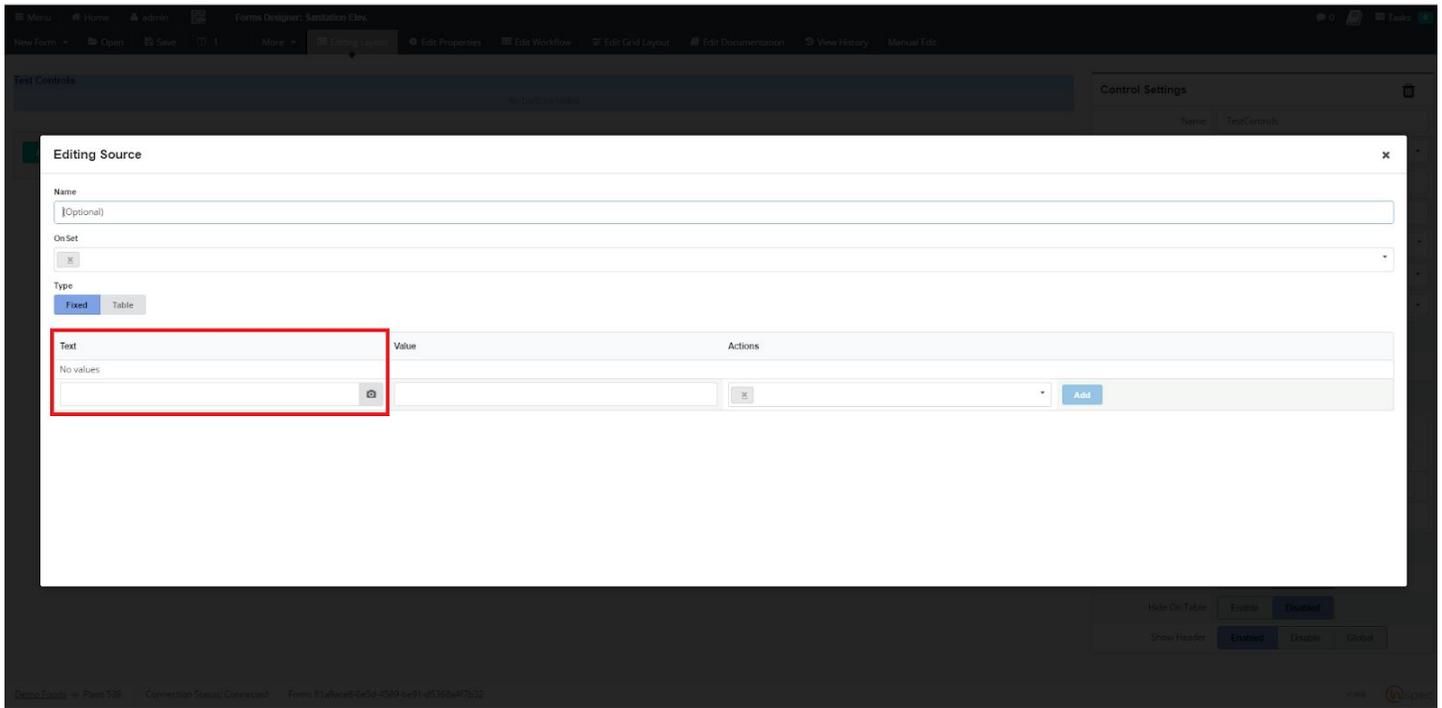




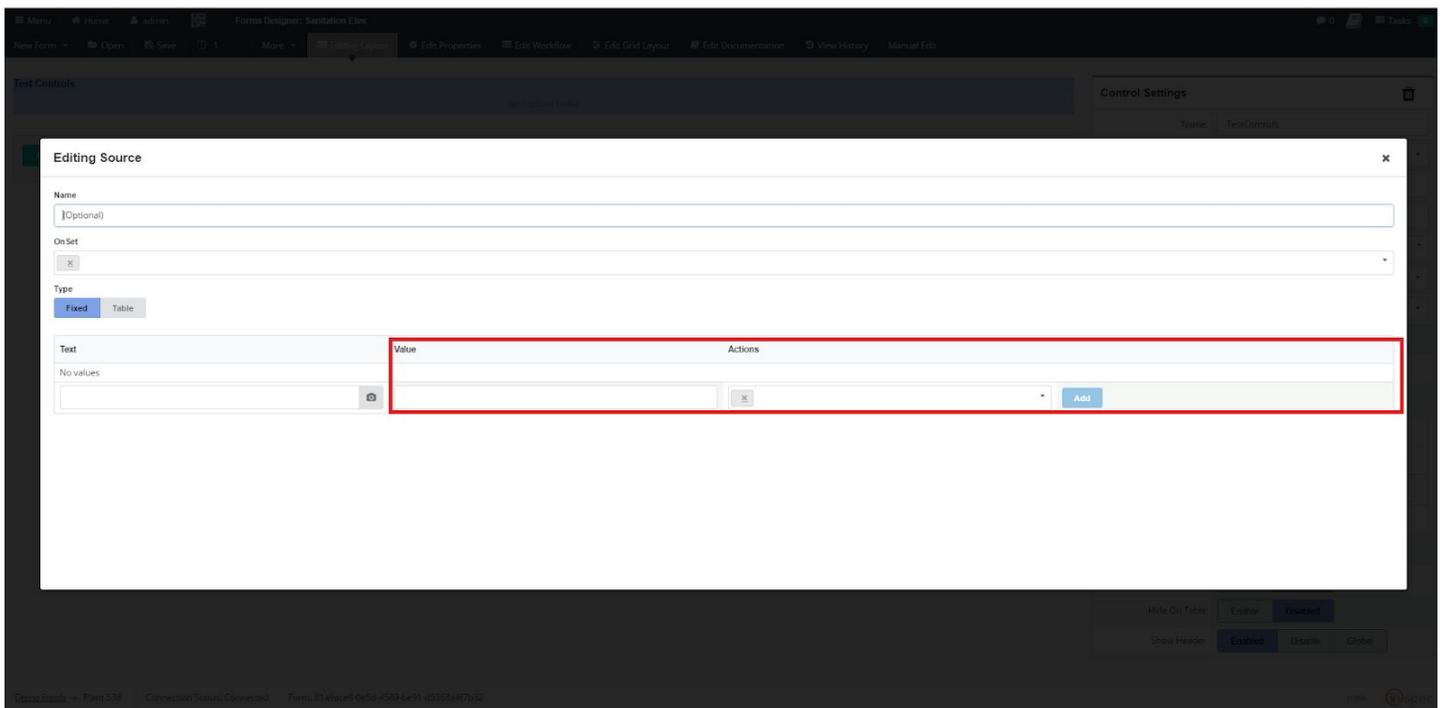
Toggle <Fixed> or <Table> to the users preference.



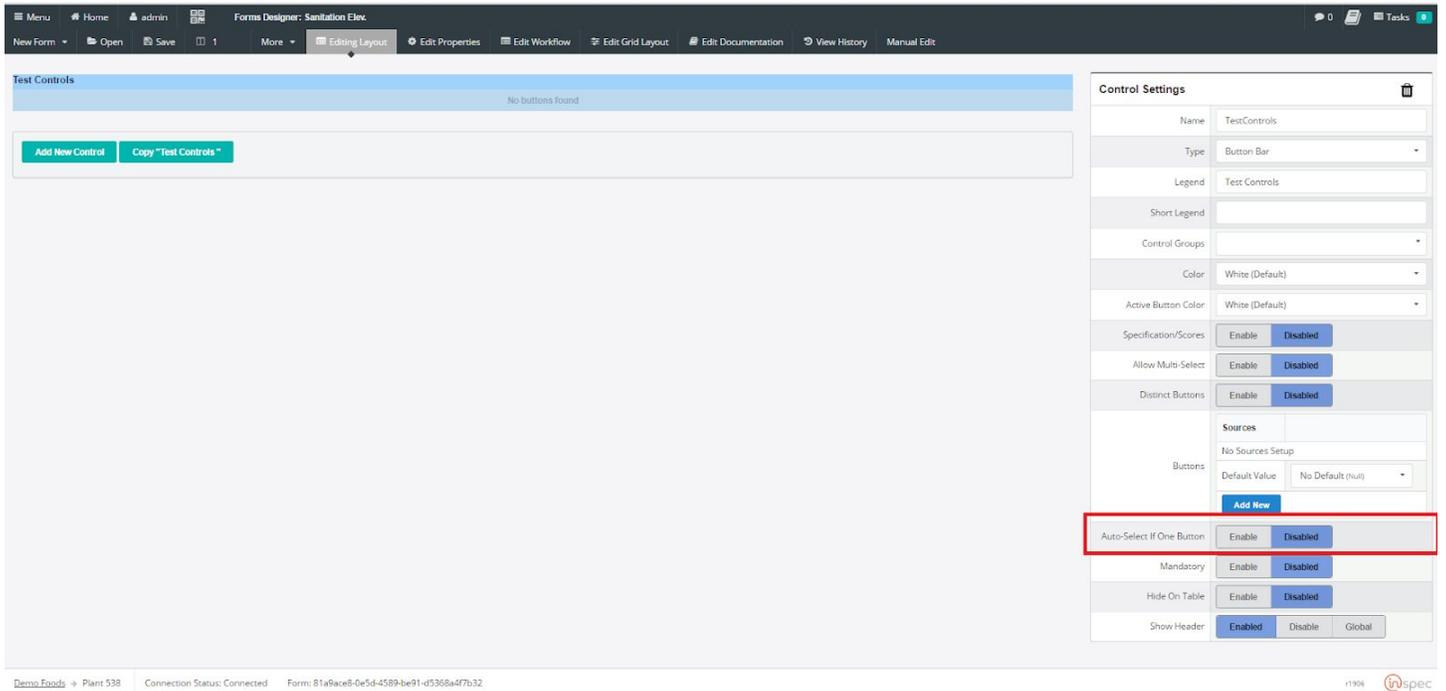
Enter values into the text field to create the display the button will read.



Create a numerical value for the button, that increases with the number of buttons created, in the text field.

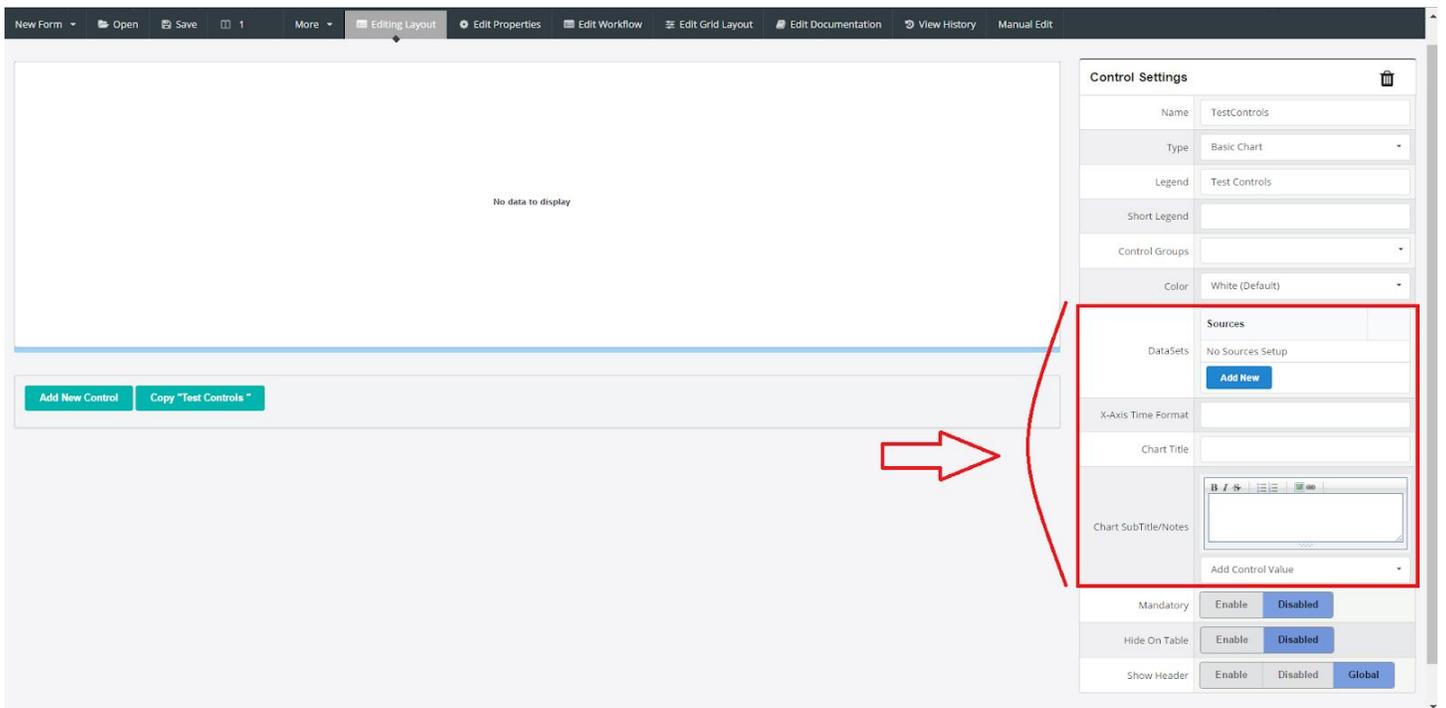


Toggle <Enable> or <Disable> to specify whether to allow auto selection of a button, in the bar, when nothing is selected.



Basic Chart

The Basic Chart control creates a visual aid for the form users, that will display custom data created by the form designer.



To create a Basic chart,

Select the Basic Chart control in the “Control Type” dropdown.
Establish a data set by selecting “Add New”

Next, name the button and select an onset role, from the dropdown.
Toggle <Fixed> or <Table>, to the users preference.
Enter values into the text field to create the display the button will read.
Create a numerical value for the button, that increases with the number the data entered, in the text field.
Enter the user's desired value for the X-axis Time format.
Enter the user's desired title for the chart, in the chart title field.
Add any notes for the chart to the chart subtitle formats, and select a control value.

Date/Time

The Date/Time control allows the user to establish a field that will save the date and time of a forms completion, and other time points in the form's life.

To create a Date/Time control,

Toggle <Enable> or <Disable> to allow inlining.
select a format the best suits the form's needs. The default format will be YYYY-MM-DD HH:mm:ss. This will present the date and time with the Year-Month-Day followed by the Hour:Minute:second.
Toggle <Enable> or <Disable> to choose between past or future only. The two subsettings must have opposite values.
Enter a time span desired, value must be entered in days.
Toggle <Enable> or <Disable> in regard to time stamp mode, for the date/time control.
Toggle <Enable> or <Disable> in regard to stamp text, given time stamp mode is enabled.
Toggle <Enable> or <Disable> to show the current time, when in the form.
Toggle <Enable> or <Disable> to hide or show the time portion.

Digital Signature

The Digital Signature control allows a user to sign a form with their specific user credentials.

****Standard Information Only****

Drop Down

The Drop Down control will present selectable preset values to a form user so that they may provide information adhering to preset data.

Toggle <Enable> or <Disable> to allow specifications/scores, or to disable them.
Toggle <Enable> or <Disable> to allow inlining.
Toggle <Enable> or <Disable> to allow the form's user to select multiple dropdown menu options.
To configure dropdown items. Select "Add New". Then enter a name desired in the name field. Select an onset option from the menu dropdown. Enter the type of dropdown item desired by toggling <Fixed> or <Table>.
Lastly, create a numerical value for the dropdown item, that increases with the number of items entered, in the text field.
Toggle <Enable> or <Disable> to allow text entry, by the form's user, in the dropdown menu.

Dynamic Control

Include Form

The Include Form control will embed one form inside of another, the embedded form will have to be filled out to complete the parent form.

Select the form desired by the user in the “Form” dropdown.

Label

The Label control will act as a section header for additional “sub” controls. The text inside of the “ Name” field will act as the label, in the Label control.

Toggle <Enable> or <Disable> to allow static text in the control, to the user’s preference.

Add additional text in the “Text” subsetting field. This text will show up underneath the label header.

List

The list function allows the user to create a list within the form.

Toggle <Enable> or <Disable> to allow the user to see multiple lines in the list.

Specify the number of lines desired in the list.

Enter a placeholder for the list, that will display until data is entered by the form’s user.

Numeric

The Numeric control is used when the data entered by the user will be only a numerical value.

Toggle <Enable> or <Disable> to allow specifications/scores, or to disable them.

Toggle <Enable> or <Disable> to allow spec popups or not, to the user’s preference.

Toggle <Enable> or <Disable> to allow inlining.

Enter a placeholder for the numeric, that will display until data is entered by the form’s user.

Define the precision desired in the numeric.

Enter a default value that will be displayed and used until unique data is entered by the form’s user.

Enter a minimum value the will not allow the user to enter values lower than that of the minimum value.

Enter a maximum value the will not allow the user to enter values lower than that of the maximum value.

Pass/Fail

The Pass/Fail control allows a user to efficiently and quickly deny a form to pass, based on data observed that would conclude this.

Toggle <Enable> or <Disable> to allow inlining.

Define a fail action that would be executed should the form fail. This could include actions such as sending

emails to admins or launching another inquiry form.

Define a pass action that would be executed should the form pass. This could include actions such as sending emails to admins or launching another additional form to the user.

Enter text data that the form creator wishes to see on the pass button. This could be as simple as "Pass" or "Form Approved".

Enter text data that the form creator wishes to see on the fail button. This could be as simple as "Fail" or "Form Denied".

Picture

The Picture control allows the user to see an image that could be used for reference related to ground floor items.

Toggle <Enable> or <Disable> to allow the image not to be available to the form's user.

Quantity

The Quantity control enables the user to have access to a concise UOM control to display the amount of product on the floor.

Toggle <Enable> or <Disable> to allow specifications/scores, or to disable them.

Toggle <Enable> or <Disable> to allow spec popups or not, to the user's preference.

Toggle <Enable> or <Disable> to allow inlining.

Toggle <Enable> or <Disable> to allow the form's user to modify the UOM chosen.

Enter desired UOM data into the UOM legend.

Define the UOM type desired for the form. This should mirror the product on the floor.

Define the precision desired in the quantity.

Enter a minimum value that will not allow the user to enter values lower than that of the minimum value.

Enter a maximum value that will not allow the user to enter values lower than that of the maximum value.

Sample

Toggle <Enable> or <Disable> to allow specifications/scores, or to disable them.

Toggle <Enable> or <Disable> to allow spec popups or not, to the user's preference.

Toggle <Enable> or <Disable> to allow inlining.

Define the precision desired in the sample.

Enter the desired task schedule frequency. This will determine how often the task is assigned to the specified users.

Enter a minimum value of samples, this will not allow the user to enter sample values lower than that of the defined minimum value.

Enter a maximum value of samples, this will not allow the user to enter sample values lower than that of the defined maximum value.

Define the UOM type desired for the form. This should mirror the product sample on the floor.

Enter a maximum duration for the sample.

Define any titles desired for the sample control.

Section

The Section control will place controls within the defined section to allow for form organization.

Toggle <Enable> or <Disable> to allow the form's user to collapse the section if they wish. This could be done if they do not wish to complete the controls or to allow for easier form navigation.

SPC Chart

Tally/Counter

The Tally/Counter control will allow the form to track data easier with arrows for adding the numerical values together.

Toggle <Enable> or <Disable> to allow specifications/scores, or to disable them.

Toggle <Enable> or <Disable> to allow spec popups or not, to the user's preference.

Toggle <Enable> or <Disable> to allow inlining.

Toggle <Enable> or <Disable> to allow a "zero" button that will bring the added values to zero again when selected.

Enter a minimum value that will not allow the user to enter values lower than that of the defined minimum value.

Enter a maximum value that will not allow the user to enter values lower than that of the defined maximum value.

Layout Window

Control Settings ([right side] slide out)

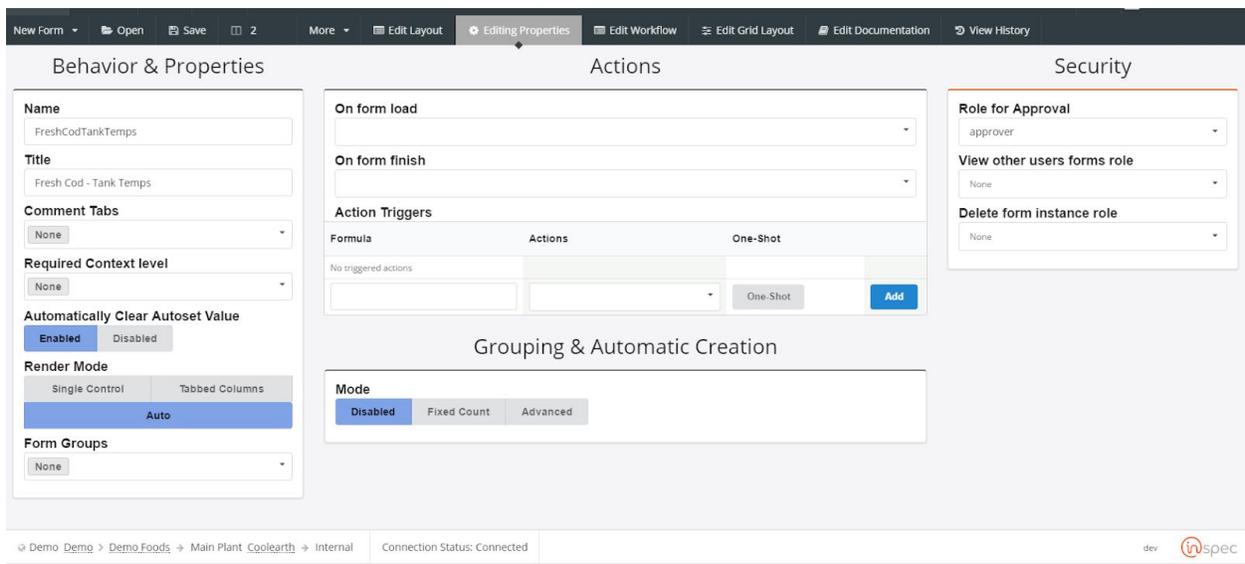
<Add New Control> button

<Copy> (Control) button

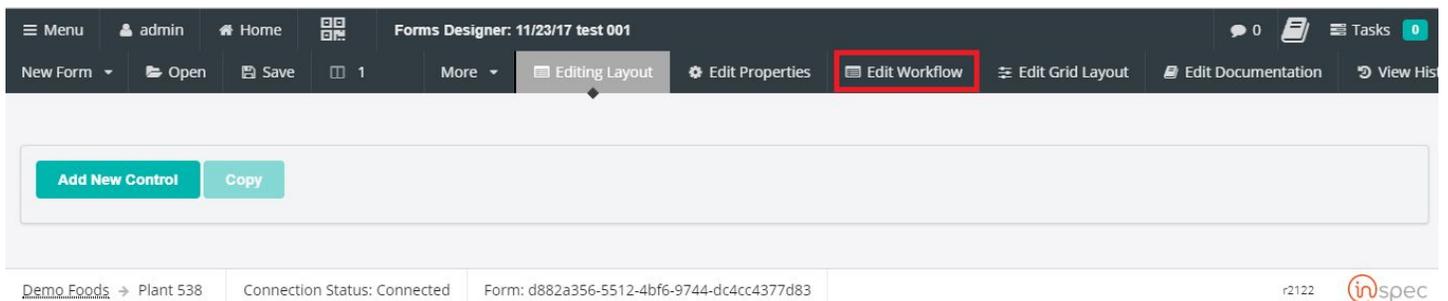
Control Types

Edit Properties

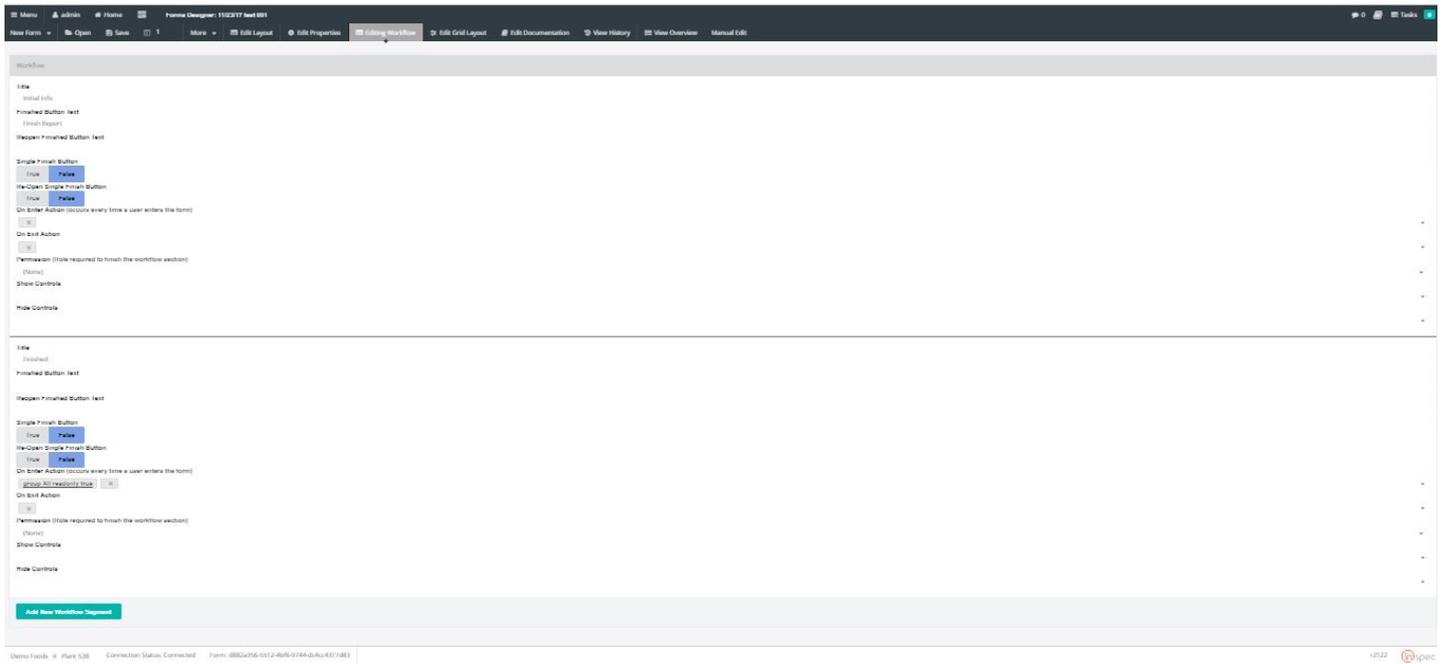
The Edit Properties tab allows you to make changes to the form.



Edit Workflow

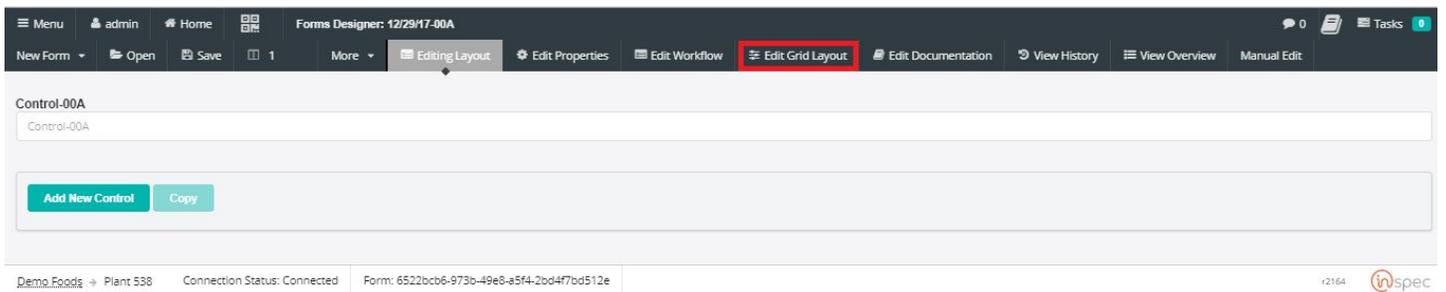


From this menu you can make various changes to the workflow like specifying on enter actions, permissions, titles, etc. To establish a title for the workflow segment click



Edit Grid Layout

This is where changes to how the form instances are displayed in the form header grid.



Under “Edit Grid Layout” Basic overriding options will be present. Then specific field options will be presented. With the specific field options a user can modify how fields within the grid are presented.

The screenshot shows the Forms Designer interface with the 'Editing Grid Layout' tab selected. On the left, the 'Grid Options' panel is highlighted with a red box. It contains three settings: 'Constrain Grid to Screen or allow Scrolling' with 'Constrain' selected, 'Maximum Number of User Fields on Grid' set to 8, and 'Long Lifetime Form (Incomplete forms don't expire)' set to 'No'. On the right, the 'Field Options' panel is visible, showing a table of fields with various configuration options.

Field	Width	Grid	Export	Clip/Wrap	Order	Mobile
Reference	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Official Time	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Form Version	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Actual Time	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Total Score	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Last Modified	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Created By	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Form Status	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Reason For Override	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Pass/Fail	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
N/A	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show

After Max Limit

The screenshot shows the Forms Designer interface with the 'Editing Grid Layout' tab selected. On the left, the 'Grid Options' panel is visible. On the right, the 'Field Options' panel is highlighted with a red box. It contains the same table of fields as the first screenshot.

Field	Width	Grid	Export	Clip/Wrap	Order	Mobile
Reference	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Official Time	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Form Version	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Actual Time	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Total Score	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Last Modified	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Created By	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Form Status	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Reason For Override	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
Pass/Fail	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show
N/A	Auto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hide Show

After Max Limit

Edit Documentation

This is where you can write up documentation for the form.

For a user with administrator privileges documentation can be written or changed.

View History

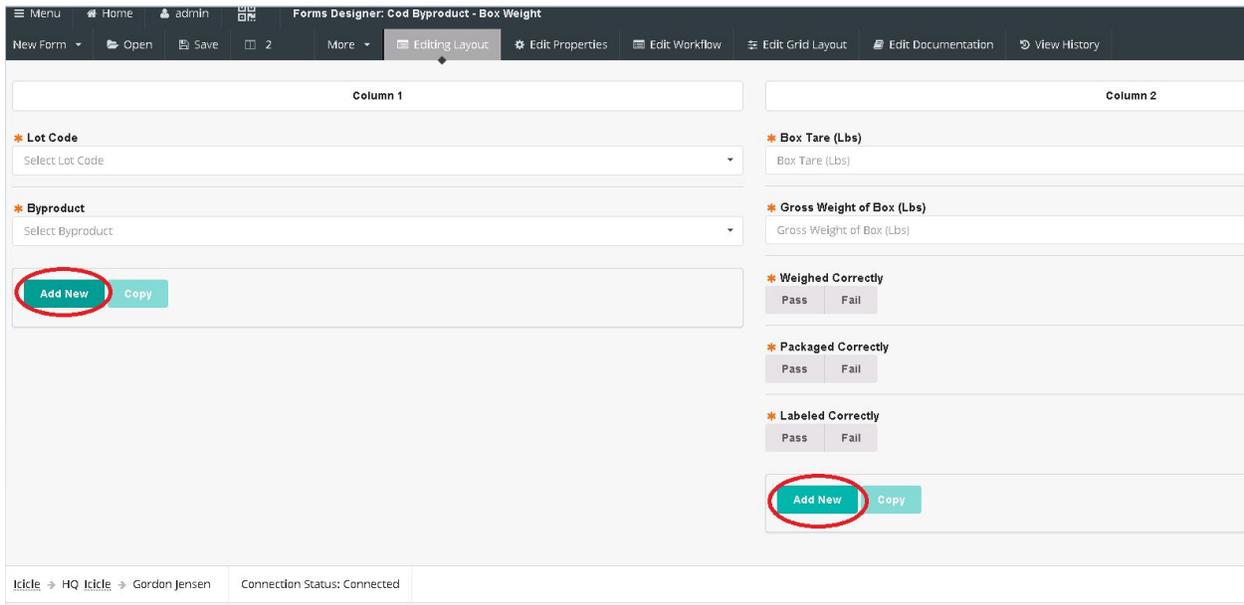
This is where you can view the history of the work done on the form. If needed, you can revert to a previous version of the form.

Update an Existing Form

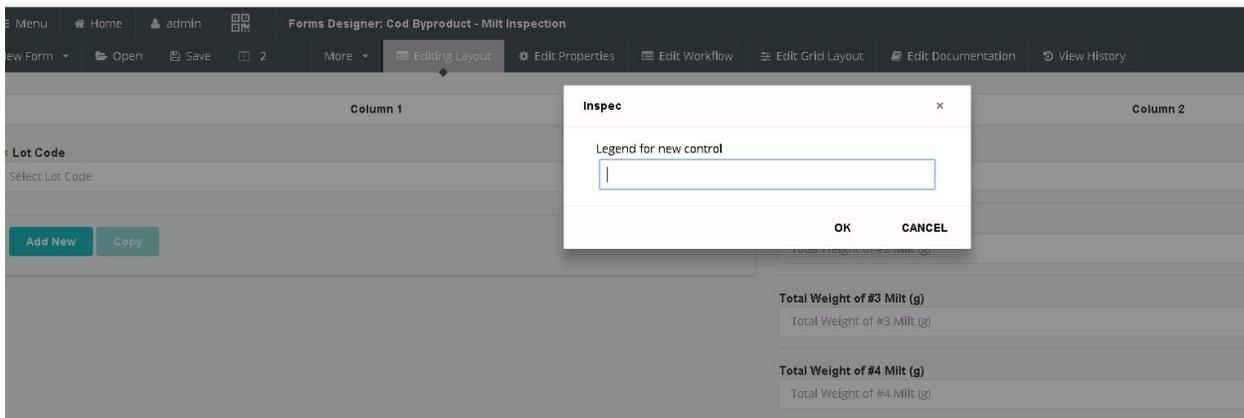
Open the form you want to edit in the Form Designer.

Add a control:

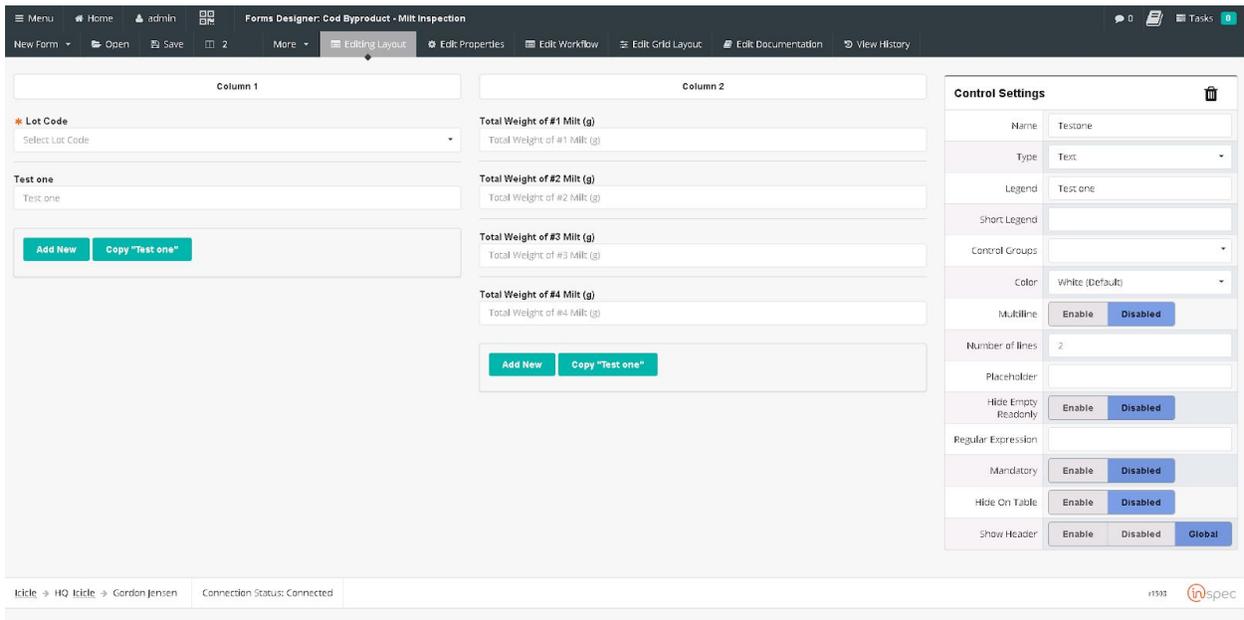
In order to add a new control, go to the area of the form where you want the new control. Press the Add New button.



You will be asked to give the new control a name.

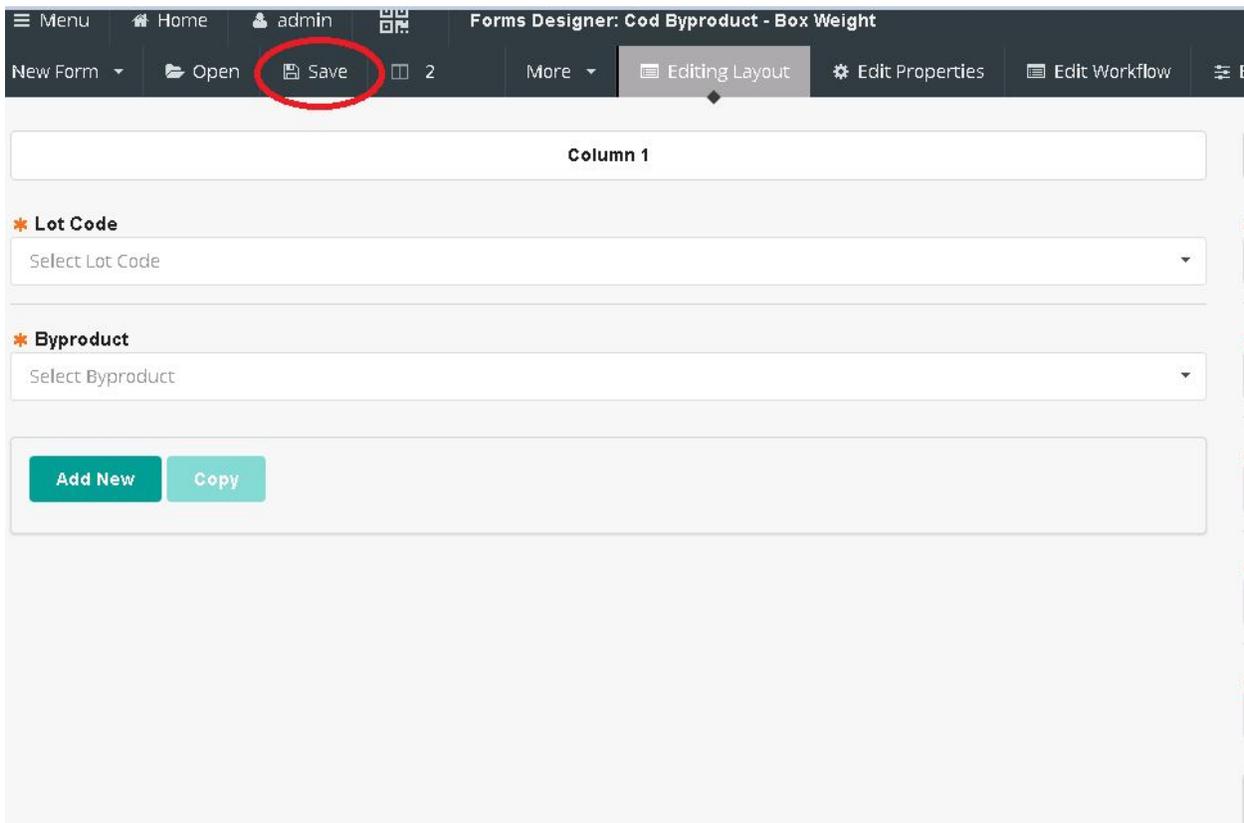


After filling out the new control name, the control will be displayed, and you will see a list of properties of the control that you can fill out, or select from.



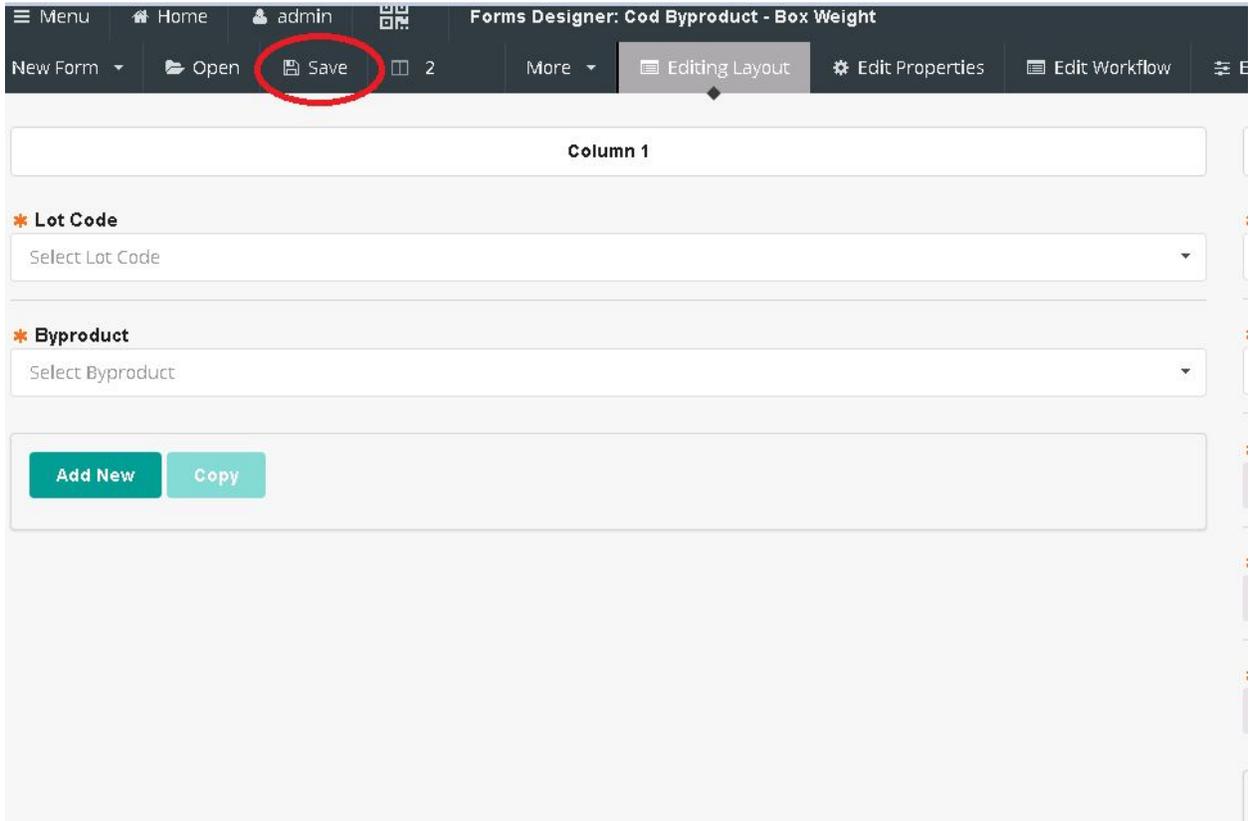
You can change the type of the control, and the list of property settings will change to reflect the new type.

When you have finished entering the information regarding your new control, be sure to press the Save button at the top of the screen.



Change an existing control:

Select the control to be changed by clicking on it. You will see the Control Settings displayed on the right-hand side of the screen, just like when adding a new control. Make any needed changes to the settings, and press the Save button at the top of the screen.



How to Delete a Form

To get to the forms designer screen select the <Menu> slide-out. Select the <Maintenances> drop-down and select <Forms Designer>.

Search... 

 Menu  Home

- Administrative 
- GMPs 
- Maintenances 
 - Action Setup
 - Cache Setup
 - Cache Viewer
 - Card Setup
 - Context Setup
 - Custom Color Setup
 - Custom UOM Setup
 - Documentation
 - Enrollment
 - Form Designer
 - Form Wizard
 - Menu Setup
 - Score Setup
 - Specification Setup
- QC Forms 
- Sanitation Forms 
- Test Plans 

Filter/Search

Showing Complete

Today's Tasks

Task Name
No Data

Recurring Task Schedules

Task Name
No Data

Search... 

Menu  Home

- Administrative 
- GMPs 
- Maintenances** 
- Action Setup
- Cache Setup
- Cache Viewer
- Card Setup
- Context Setup
- Custom Color Setup
- Custom UOM Setup
- Documentation
- Enrollment
- Form Designer
- Form Wizard
- Menu Setup
- Score Setup
- Specification Setup

- QC Forms 
- Sanitation Forms 
- Test Plans 

Filter/Search

Showing Complete

Today's Tasks

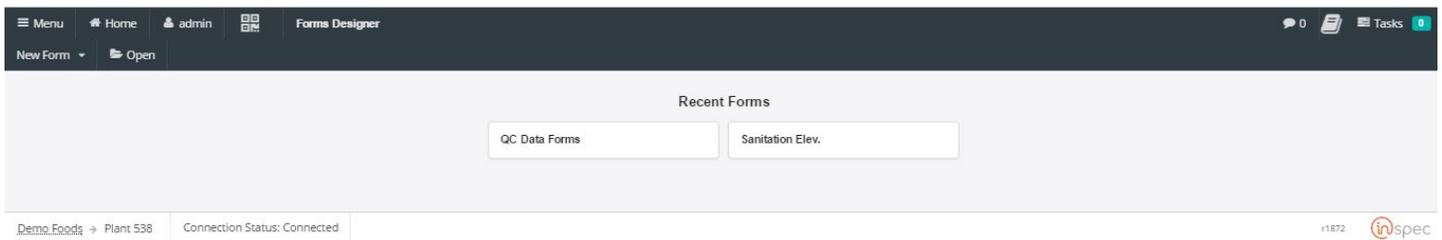
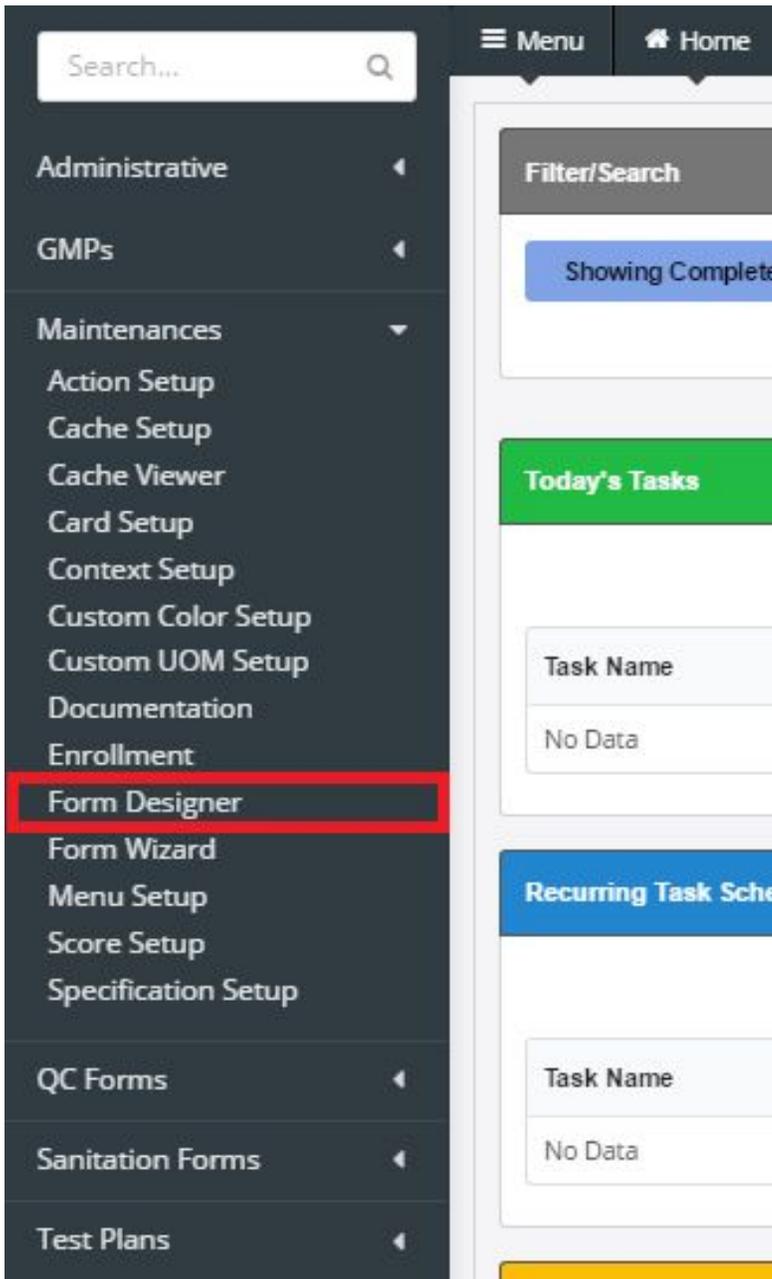
Task Name

No Data

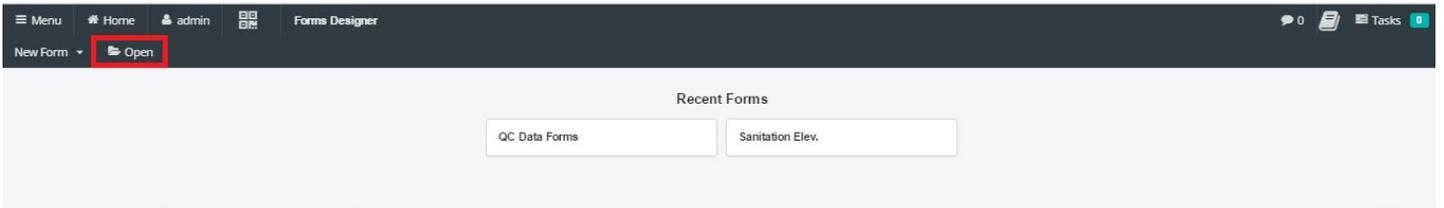
Recurring Task Sched

Task Name

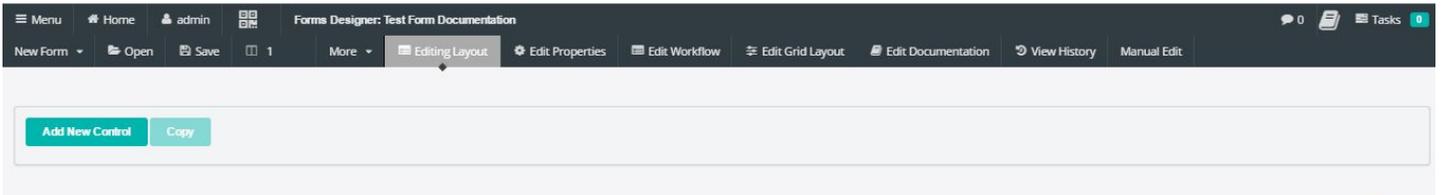
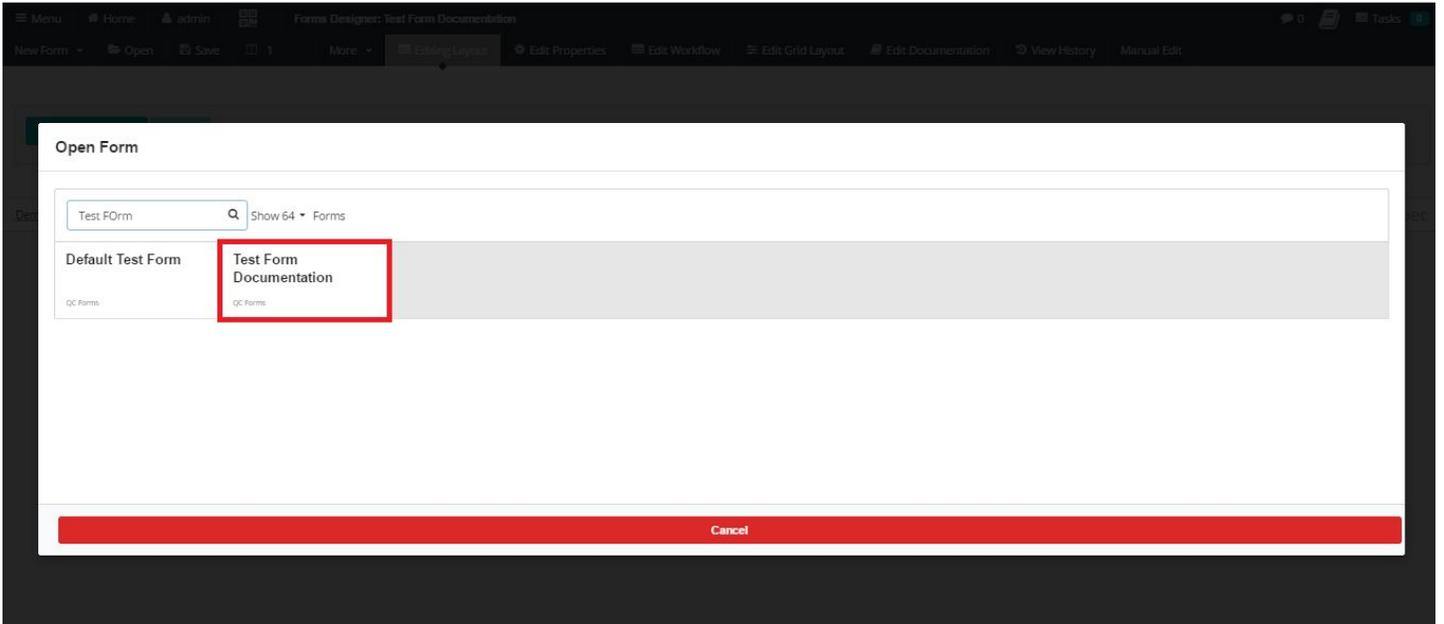
No Data



Open the form the user wishes to remove.

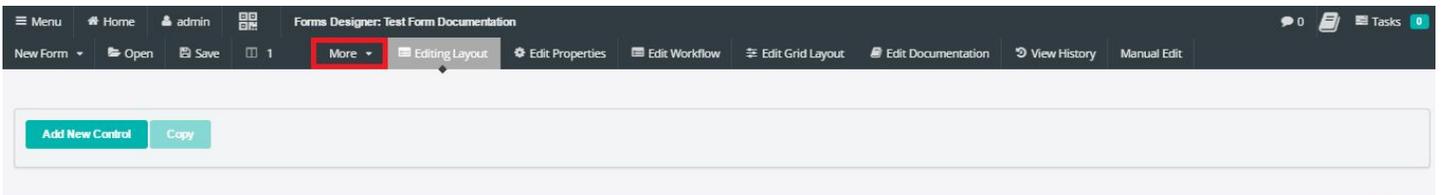


Demo Foods → Plant 538 Connection Status: Connected r1872 inSpec



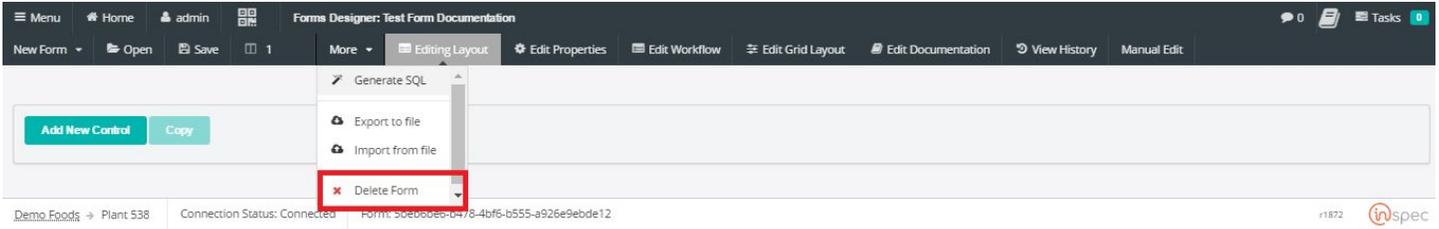
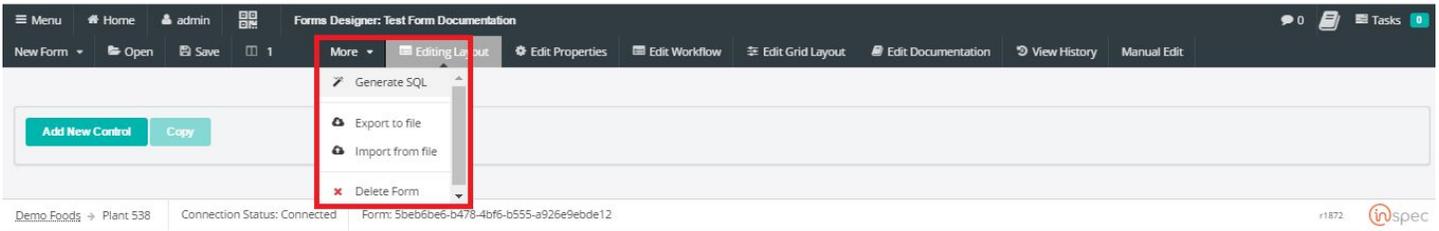
Demo Foods → Plant 538 Connection Status: Connected Form: 5beb6be6-b478-4bf6-b555-a926e9ebde12 r1872 inSpec

Navigate to the <More> subtab, in forms designer.

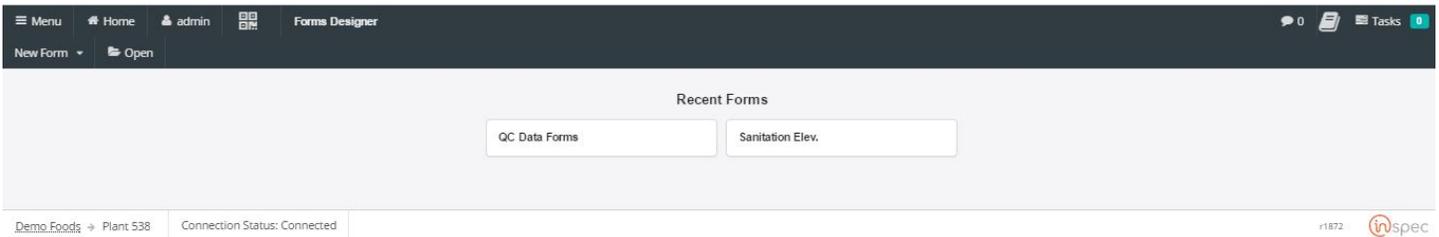
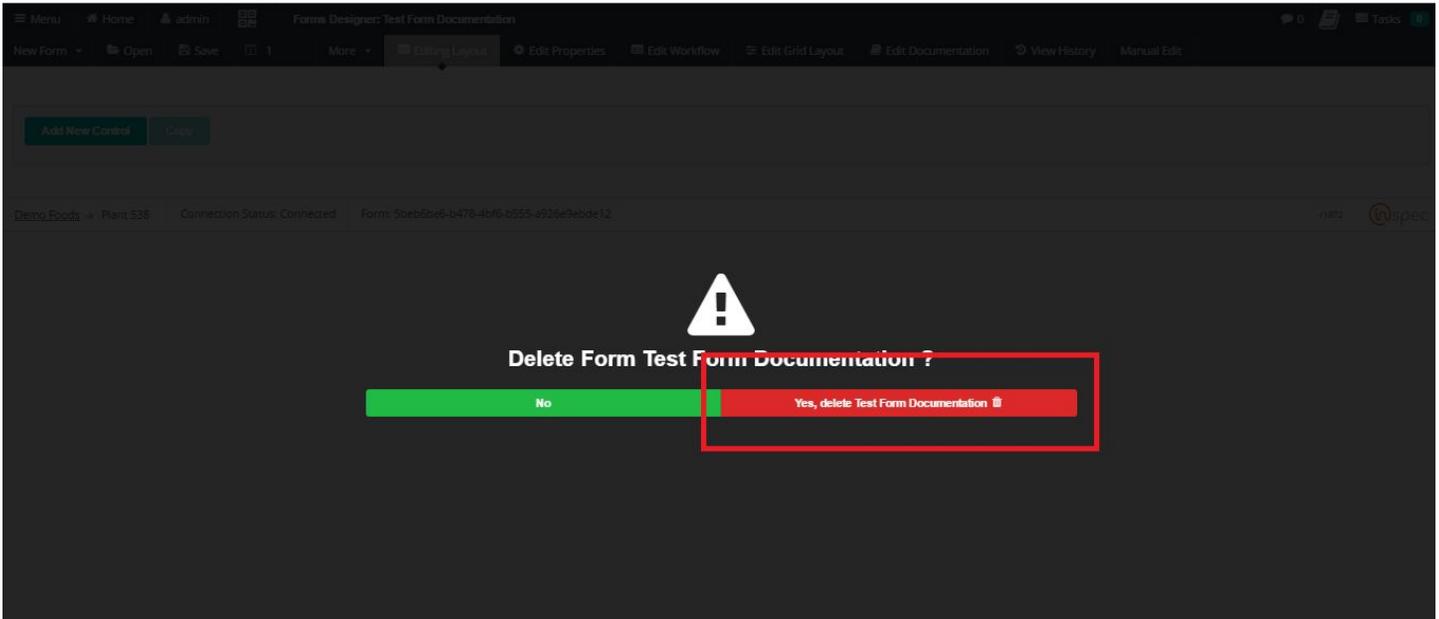


Demo Foods → Plant 538 Connection Status: Connected Form: 5beb6be6-b478-4bf6-b555-a926e9ebde12 r1872 inSpec

Select "More" and then proceed to the "Delete Form" action and select it. The system will display a safety action that ensures the user wishes to remove the form permanently



Select "Yes, delete form" to discard the form. The system will return the user to the forms designer load screen.



How to Promote Forms (Change Management) (ToDo)

Data Review & Approval Management (ToDo)

 Role Permissions Needed	
Role Value	Role Name
dataAdmin	Data Administrator

Action Management

 Role Permissions Needed	
Role Value	Role Name
formAdmin	Form Administrator

To get to the cache management select the <Menu> slide-out. Next, the <Maintenances> drop-down. Lastly, <Cache Setup>.



Search...

- Administrative
- Cron History**
- Diagnostic
- Image Browser
- Security
- Settings
- System Health
- System Setup
- Tasking
- Users

GMPs

- Maintenances**
- Action Setup
- Cache Setup
- Cache Viewer
- Card Setup
- Context Setup
- Custom Color Setup
- Custom UOM Setup
- Documentation
- Enrollment
- Form Designer
- Form Wizard
- Menu Setup
- Score Setup
- Specification Setup

Menu Home

Filter/Search

Showing Complete

Today's Tasks

Task Name

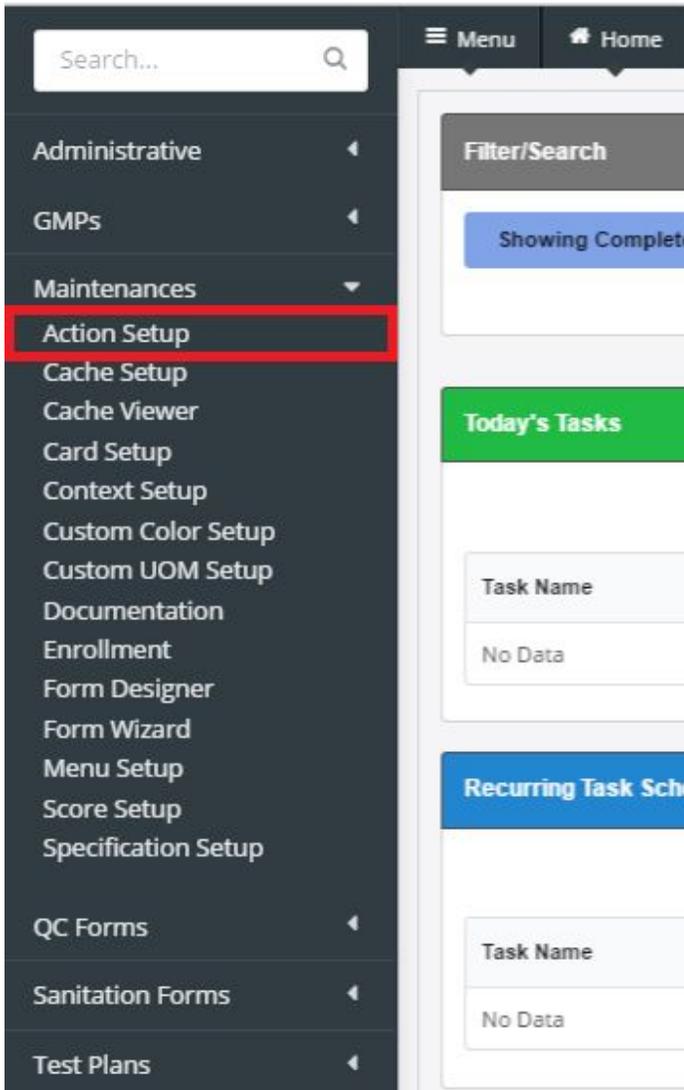
No Data

Recurring Task Schedules

Task Name

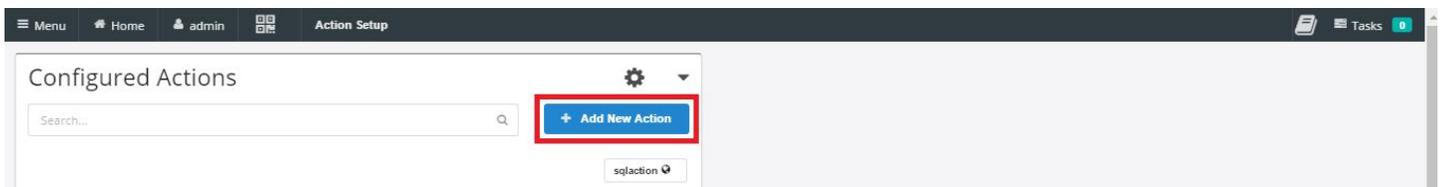
No Data

Task History

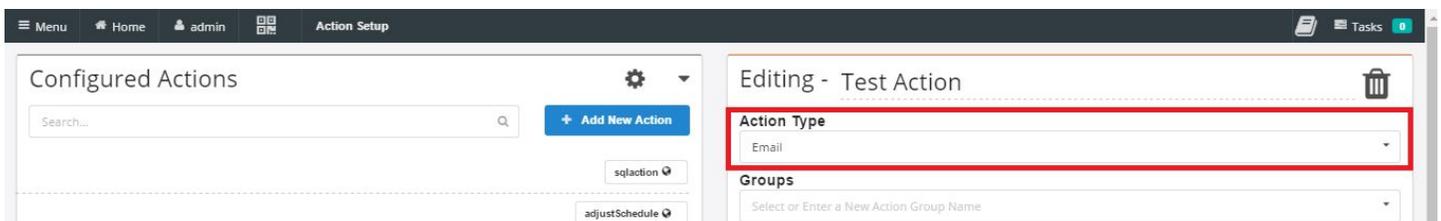


To use action setup,

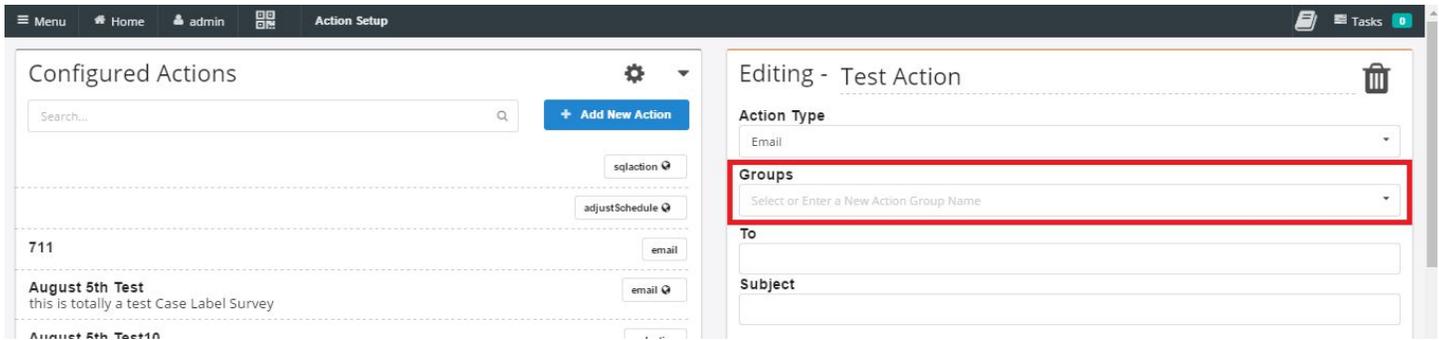
Select <Add New Action>, in the action setup screen.



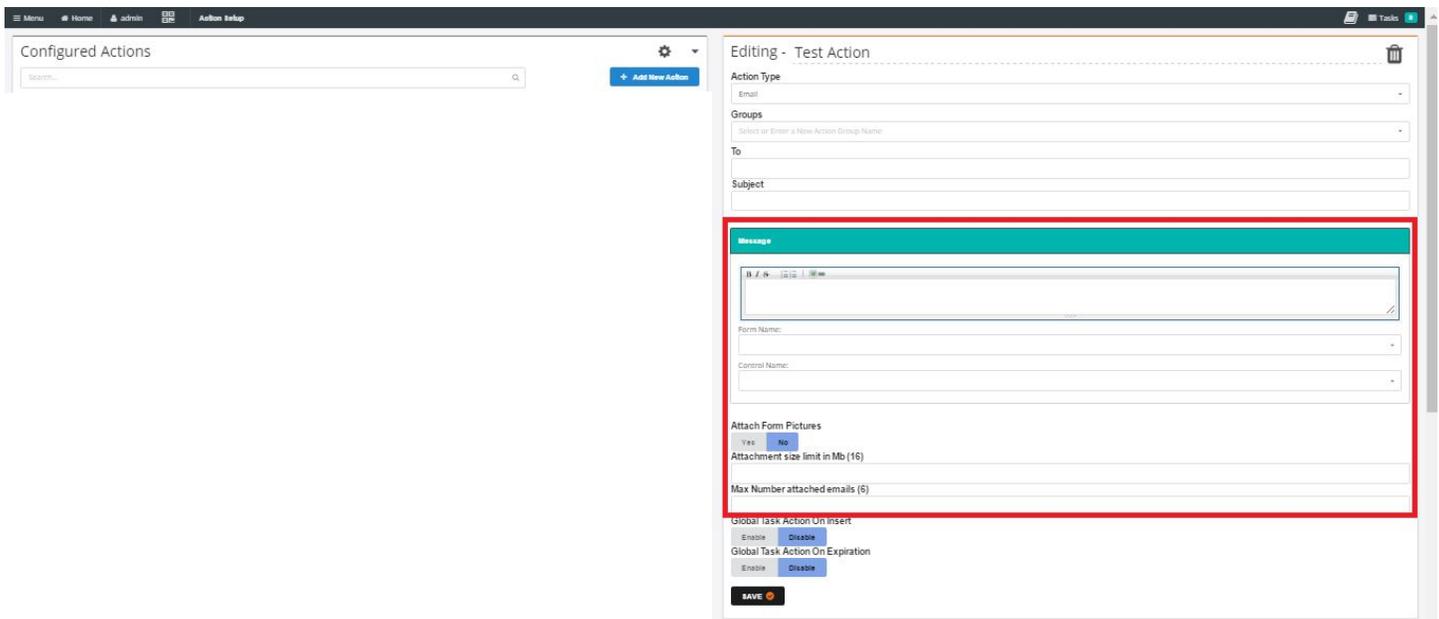
Now the user will be brought to the action editing screen. Choose an action type, with the “Action Type” drop-down.



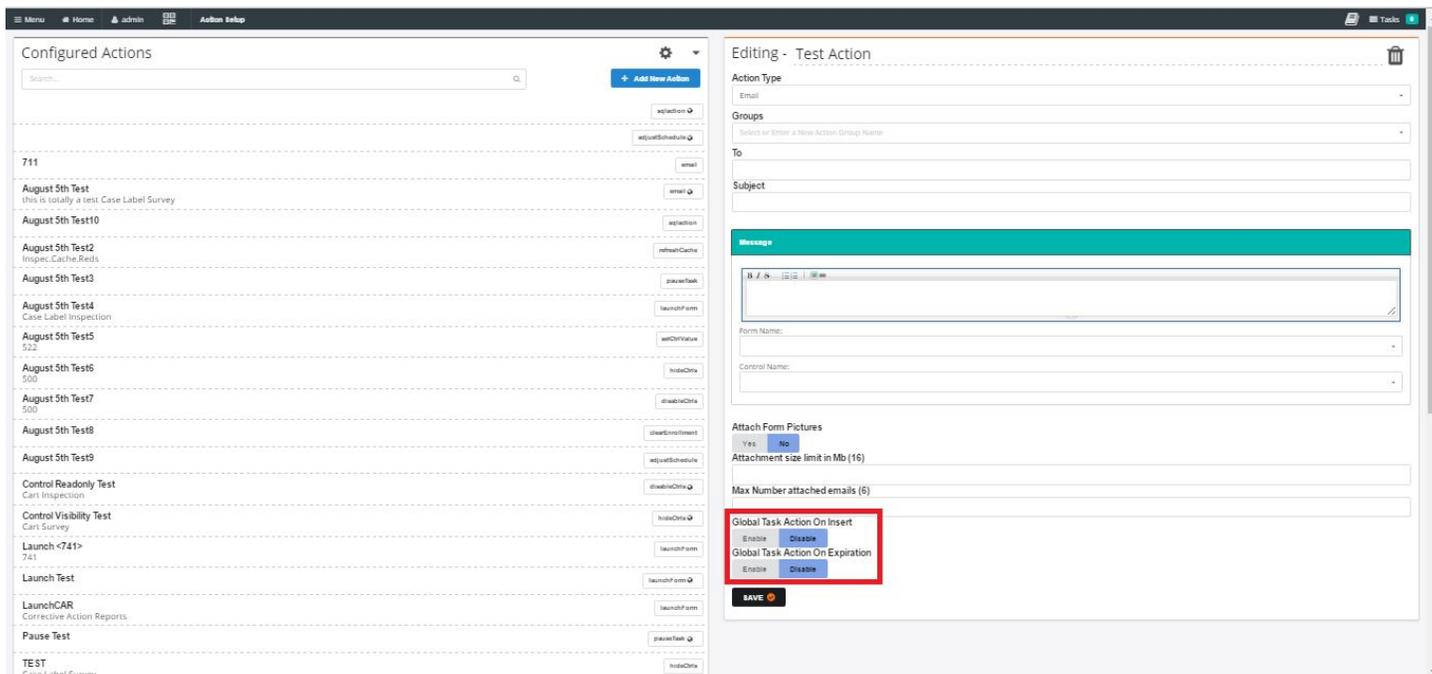
Choose a group to assign the action to.



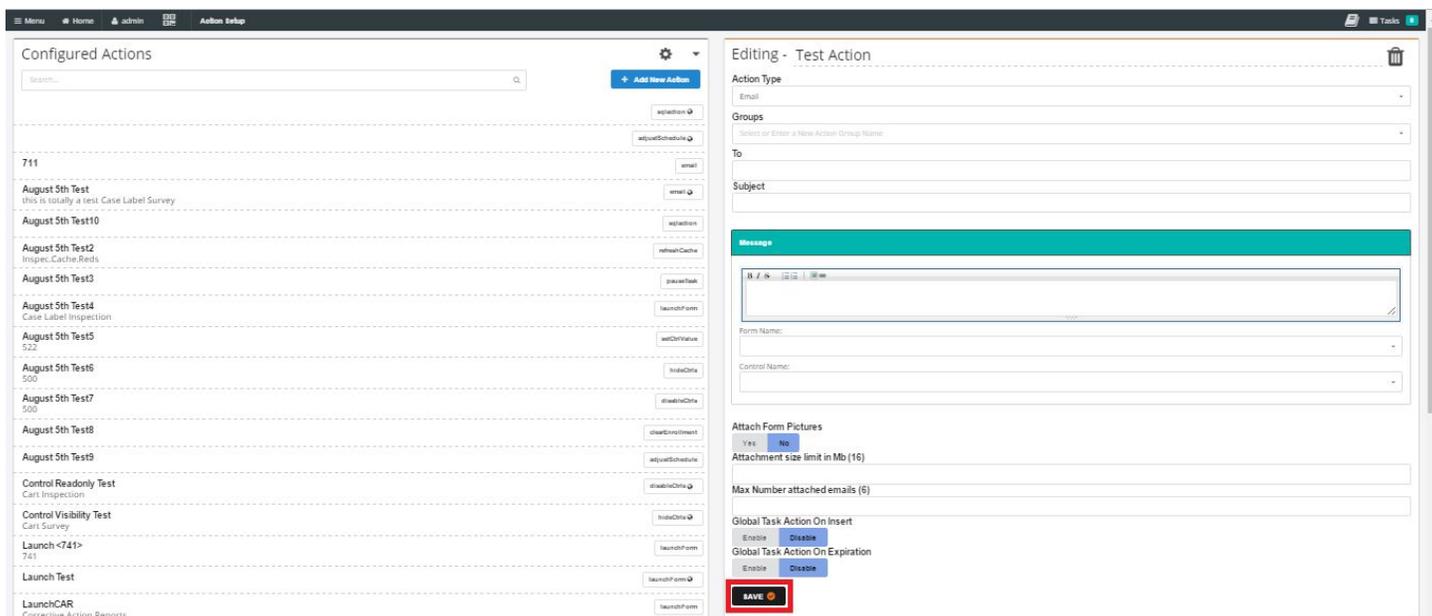
Complete the remainder of the form specific to the action chosen by the user.



Choose global task action on insert and expiration, with either <enable> or <disable>.



Save action when finished.

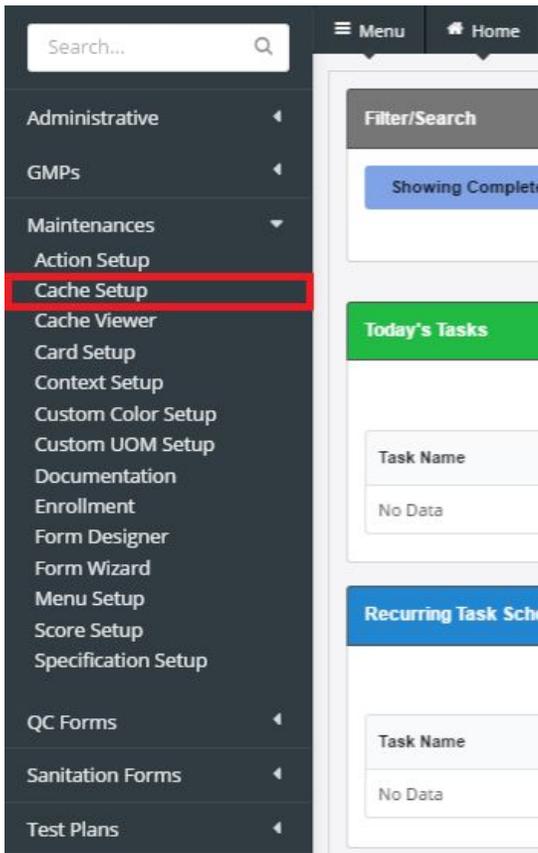


Cache Management

To get to the cache management select the <Menu> slide-out. Next, the <Maintenances> drop-down. Lastly, <Cache Setup>.



The image shows a software interface with a dark sidebar menu on the left and a main content area on the right. The sidebar menu is organized into sections: 'Administrative' (with 'Cron History' highlighted), 'GMPs', and 'Maintenances' (highlighted with a red border). Below 'Maintenances' are various setup and configuration options. The main content area has a top navigation bar with 'Menu' and 'Home' icons. Below this is a 'Filter/Search' section with a search bar and a 'Showing Complete' button. The 'Today's Tasks' section is highlighted in green and contains a 'Task Name' input field and a 'No Data' message. The 'Recurring Task Scheduler' section is highlighted in blue and also contains a 'Task Name' input field and a 'No Data' message. At the bottom, there is a 'Task History' section highlighted in yellow.



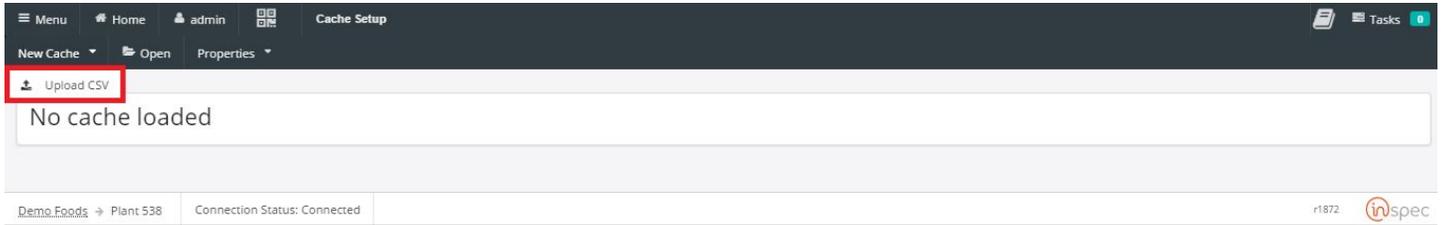
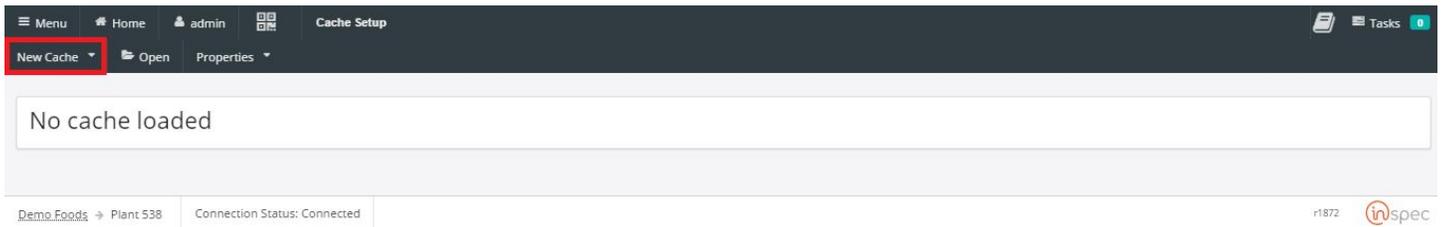
Cache Setup

 Role Permissions Needed	
Role Value	Role Name
formAdmin	Form Administrator

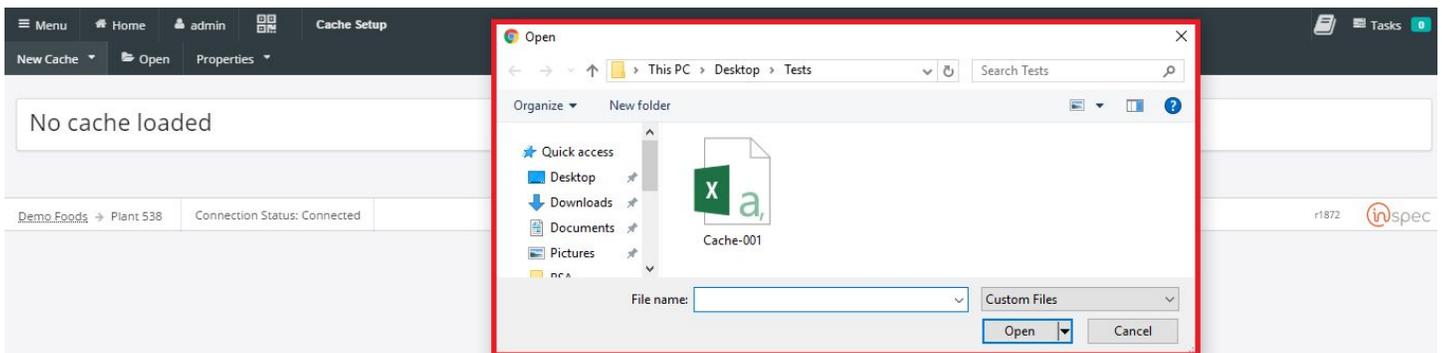
The Cache Setup screen allows the user to open existing caches, create new caches, edit existing caches, and view cache properties.

To create new cache,

Select <New Cache> from the submenu and select "Upload CSV".

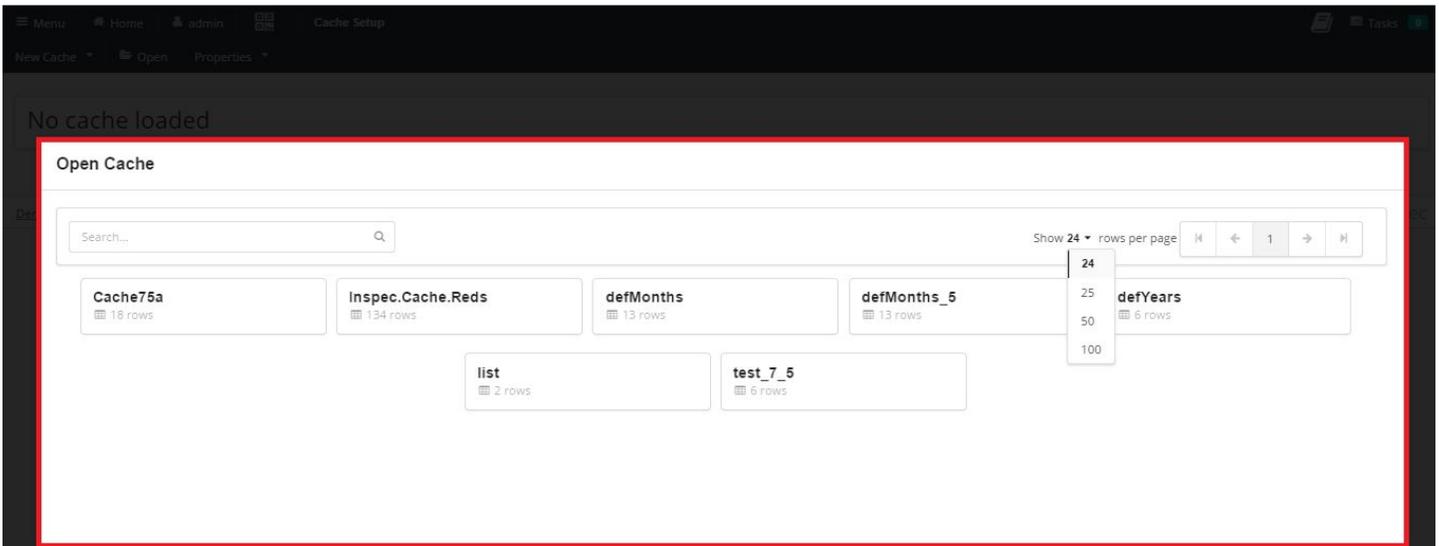


Choose the desired CSV file for the cache from the file explorer. The file chosen will usually be a spreadsheet created for the purpose of a cache and saved as a CSV.

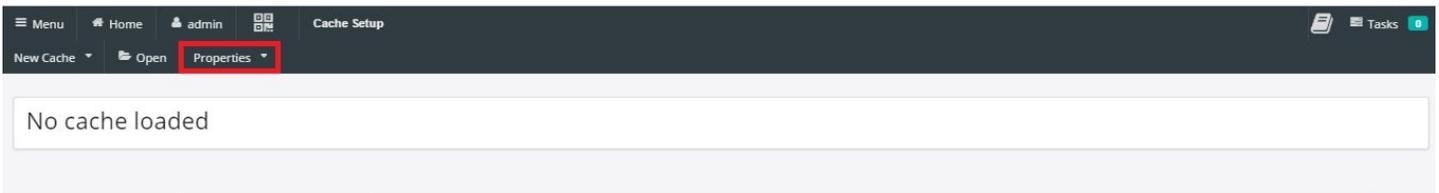


Select <Open Caches> from the cache setup submenu. Then, choose the desired cache from the populating field of existing caches.





To import or export caches from (or to) a file, select <Properties>. From there, select either “Export to file” or “Import from file”.



Cache Viewer

The cache viewer requires the same permissions and access steps as the cache setup, with the exception that the user will select “Cache Viewer” rather than “Cache Setup”.



Once in the cache viewer screen, use the drop-down to choose a cache to open and view.

Cache Viewer

Cache

Cache75a	18 / 18 rows
Inspec.Cache.Reds	134 / 134 rows
defMonths	15 / 13 rows
defMonths_5	14 / 13 rows
defYears	6 / 6 rows
list	2 / 2 rows

r1872 inSpec

Cache: Inspec.Cache.Reds

Cache

Inspec.Cache.Reds 134 / 134 rows Show 100 rows

1 2

Reds

RED1

RED2

RED3

RED4

RED5

RED6

RED7

RED8

RED9

RED10

RED11

RED12

RED13

Card Setup

 Role Permissions Needed	
Role Value	Role Name
cardAdmin	Card Administrator

Custom Color Setup

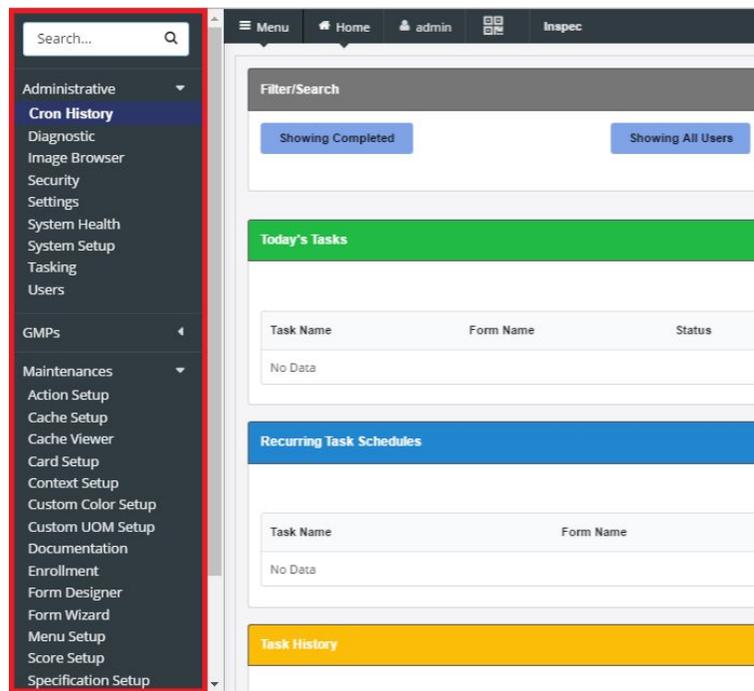


Role Permissions Needed

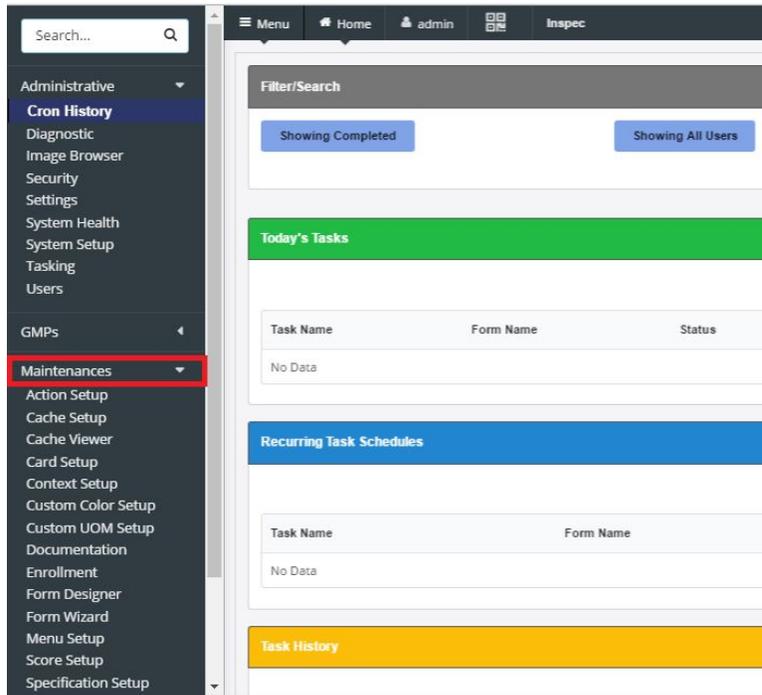
Role Value	Role Name
systemAdmin	System Administrator

The custom color feature can only be used by a user with administrator privileges.

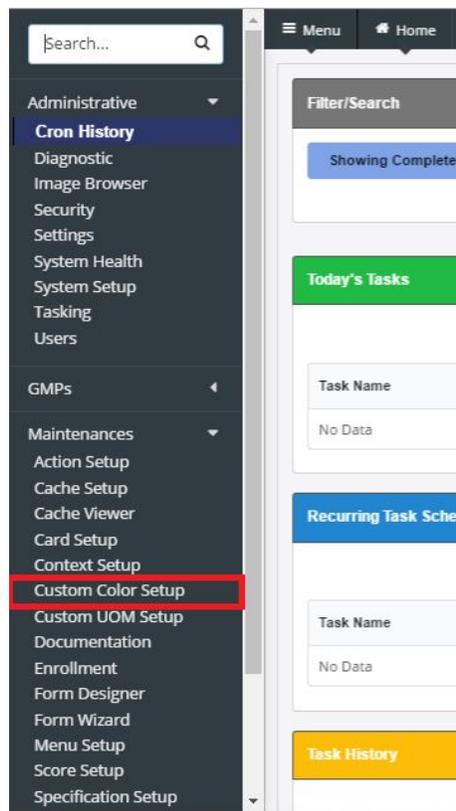
Select the <Menu> slide-out



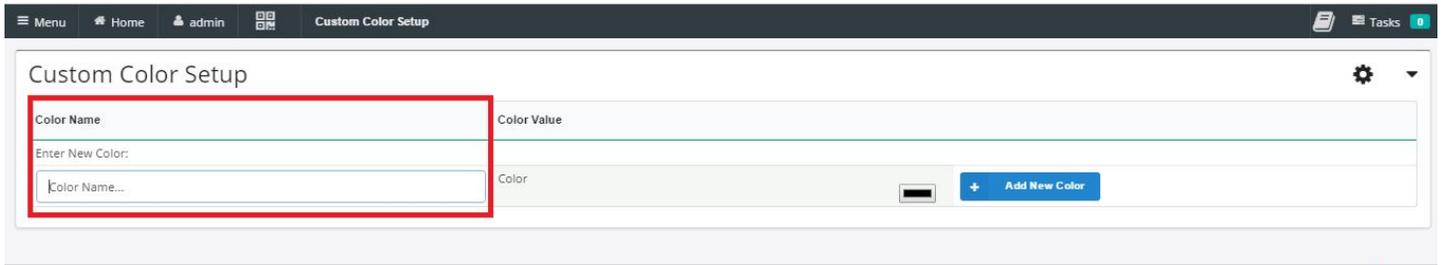
Select the <Maintenances> Drop-down



Select <Custom Color Setup>

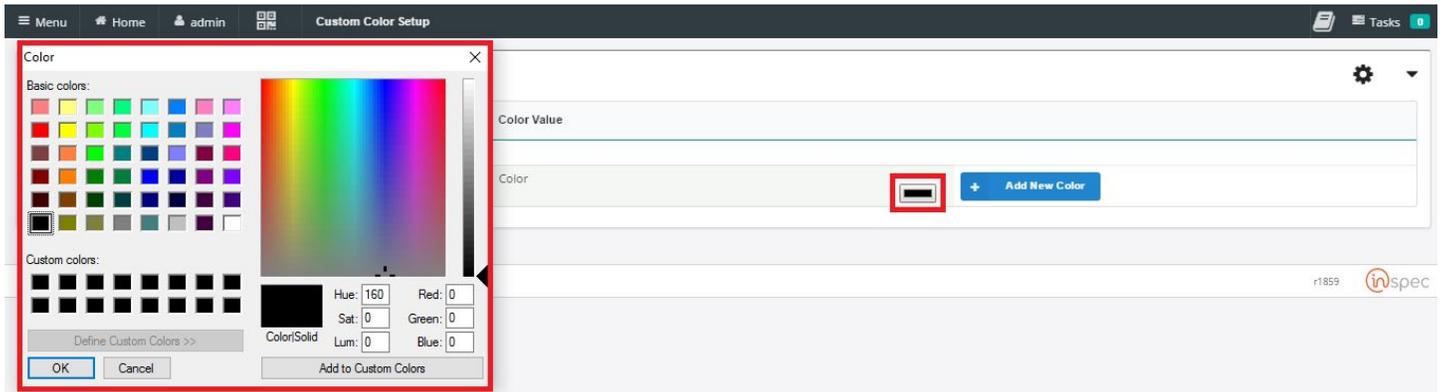


First, add the color name desired. Next, select the desired color from the color palette. Then select the <Add New Color> button to register the new color and move onto the next input.



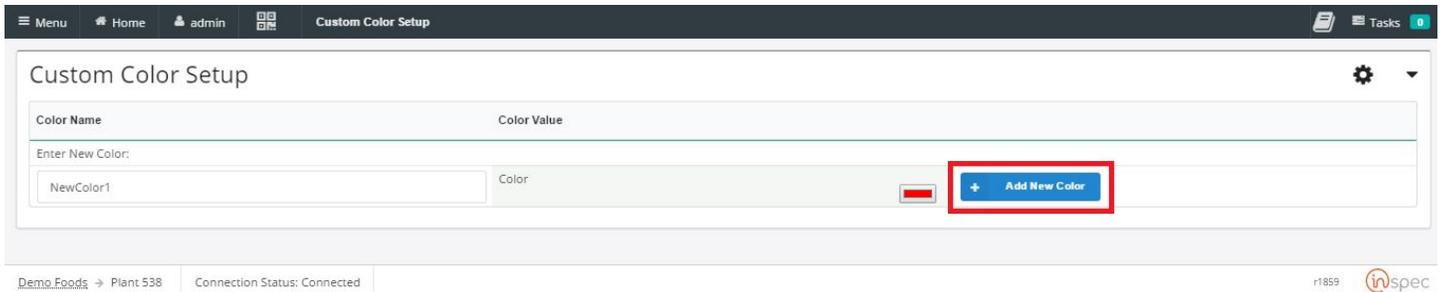
Demo Foods → Plant 538 Connection Status: Connected

r1859 inSpec



Demo Foods → Plant 538 Connection Status: Connected

r1859 inSpec



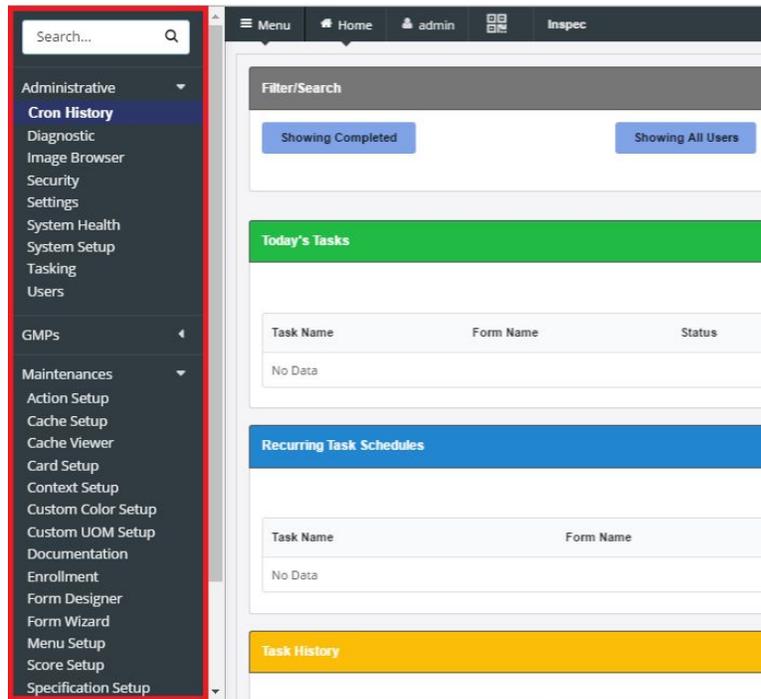
Custom UOM Setup

 Role Permissions Needed	
Role Value	Role Name
systemAdmin	System Administrator

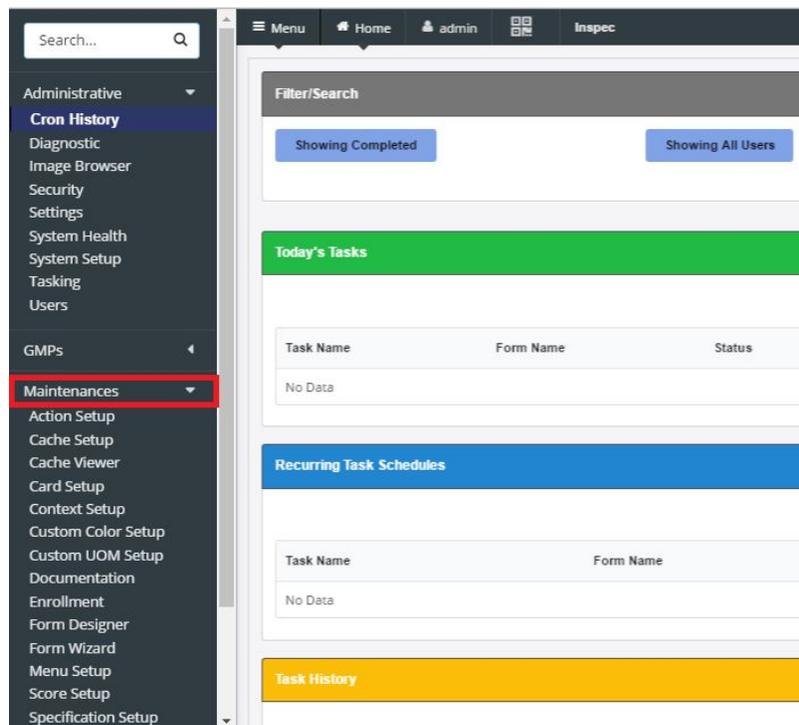
The custom UOM (Unit Of Measure) setup can be used when the user wishes to add a form unique UOM that is not already known by the system. A UOM can be something like a box, that does not have a specific

measure behind it.

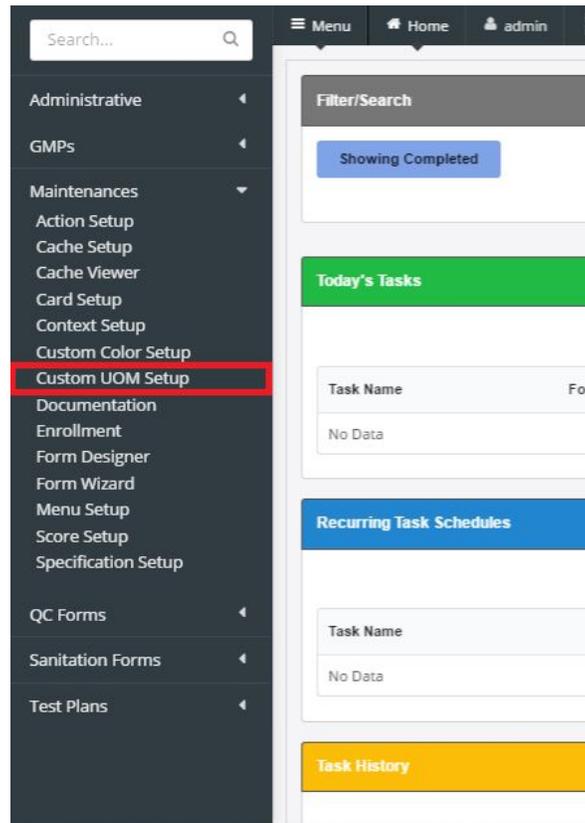
Select the <Menu> slide-out



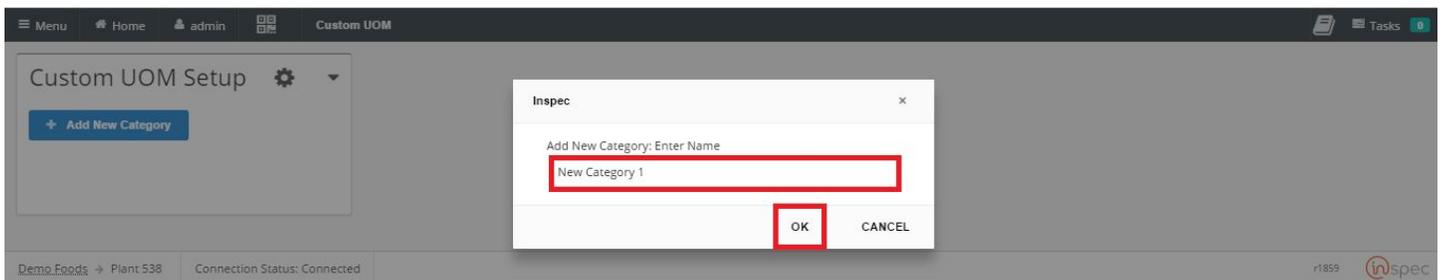
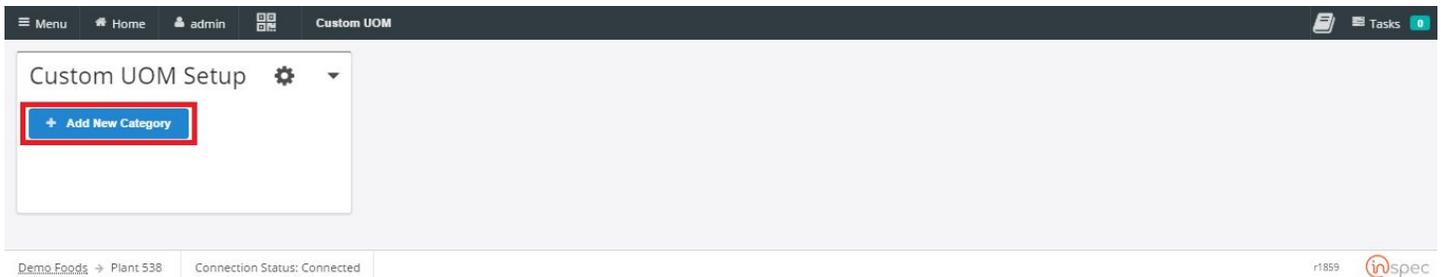
Select the <Maintenances> Drop-down.



Select <Custom UOM Setup>



Select <Add New Category>, name the new category, and press <OK>



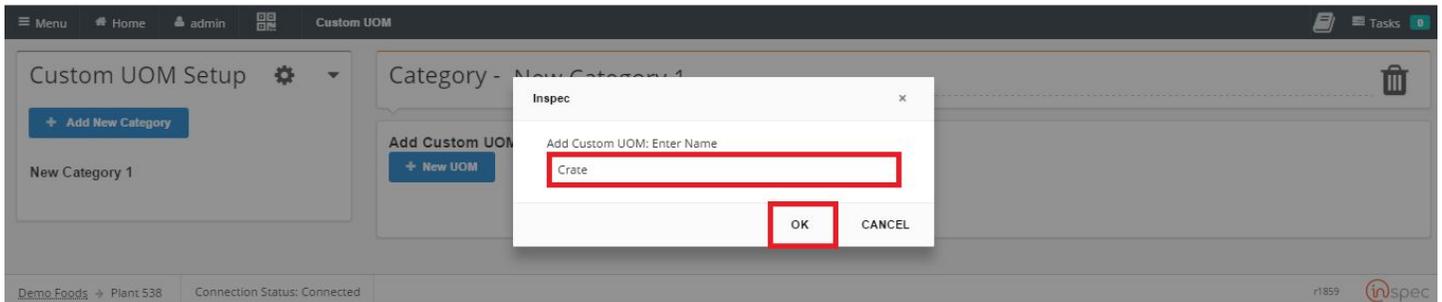
Select the new category created by the user.



Select <New UOM>



Add the custom UOM desired by the user. Next, select <OK>.



To delete custom UOMs, perform all steps up to selecting the category desired. Then select the category or UOM that is being deleted and select the trash can icon.



Inspec Documentation Editor

 Role Permissions Needed	
Role Value	Role Name
formAdmin	Form Administrator

Menu Setup

 Role Permissions Needed	
Role Value	Role Name
formAdmin	Form Administrator

The Menu Setup allows the user to make changes to the menu slide-out tab and how it is specifically organized. The user can create new dropdowns and place other dropdowns, or forms, in subsections of these. Users may also place dropdown menus or forms in duplicate locations.

To get to the Menu Setup select the <Menu> slide-out.
 Next, the <Maintenances> drop-down.
 Lastly, <Menu Setup>.



Search...

Administrative

- Cron History**
- Diagnostic
- Image Browser
- Security
- Settings
- System Health
- System Setup
- Tasking
- Users

GMPs

- Maintenances**
- Action Setup
- Cache Setup
- Cache Viewer
- Card Setup
- Context Setup
- Custom Color Setup
- Custom UOM Setup
- Documentation
- Enrollment
- Form Designer
- Form Wizard
- Menu Setup
- Score Setup
- Specification Setup

Menu Home

Filter/Search

Showing Complete

Today's Tasks

Task Name

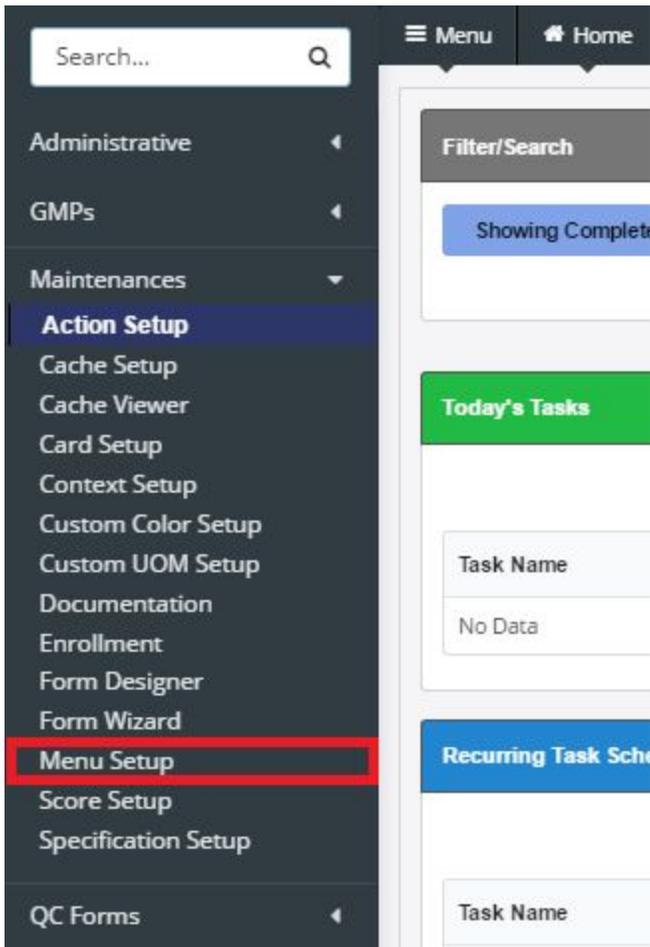
No Data

Recurring Task Schedules

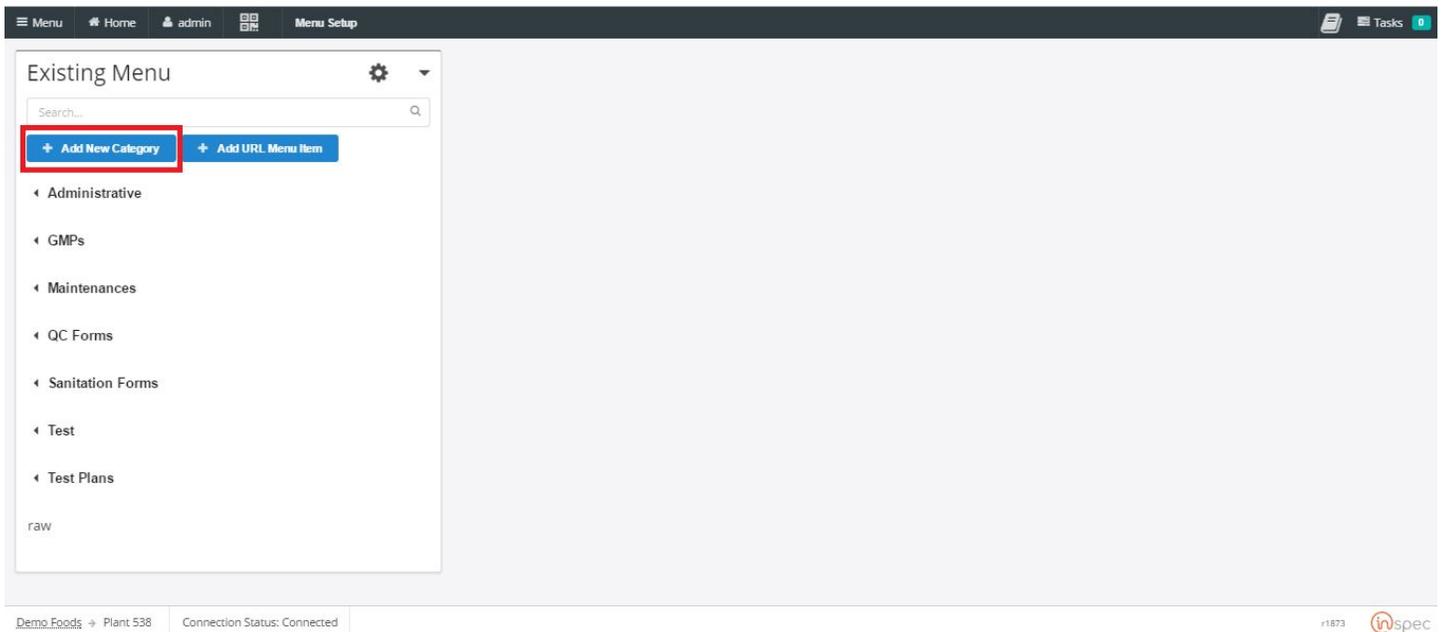
Task Name

No Data

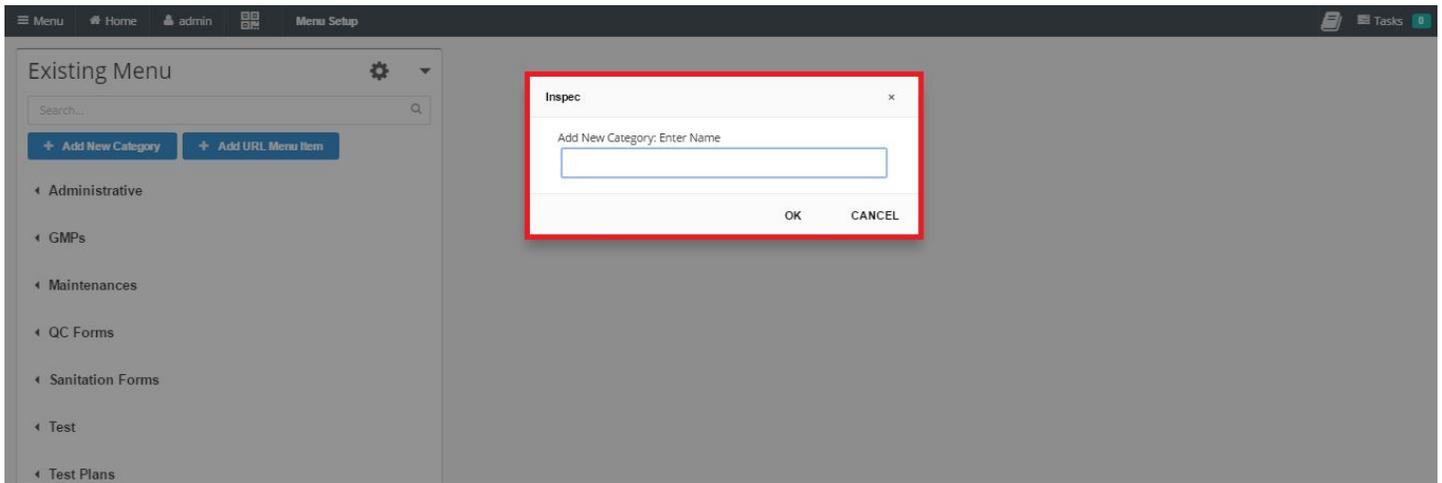
Task History



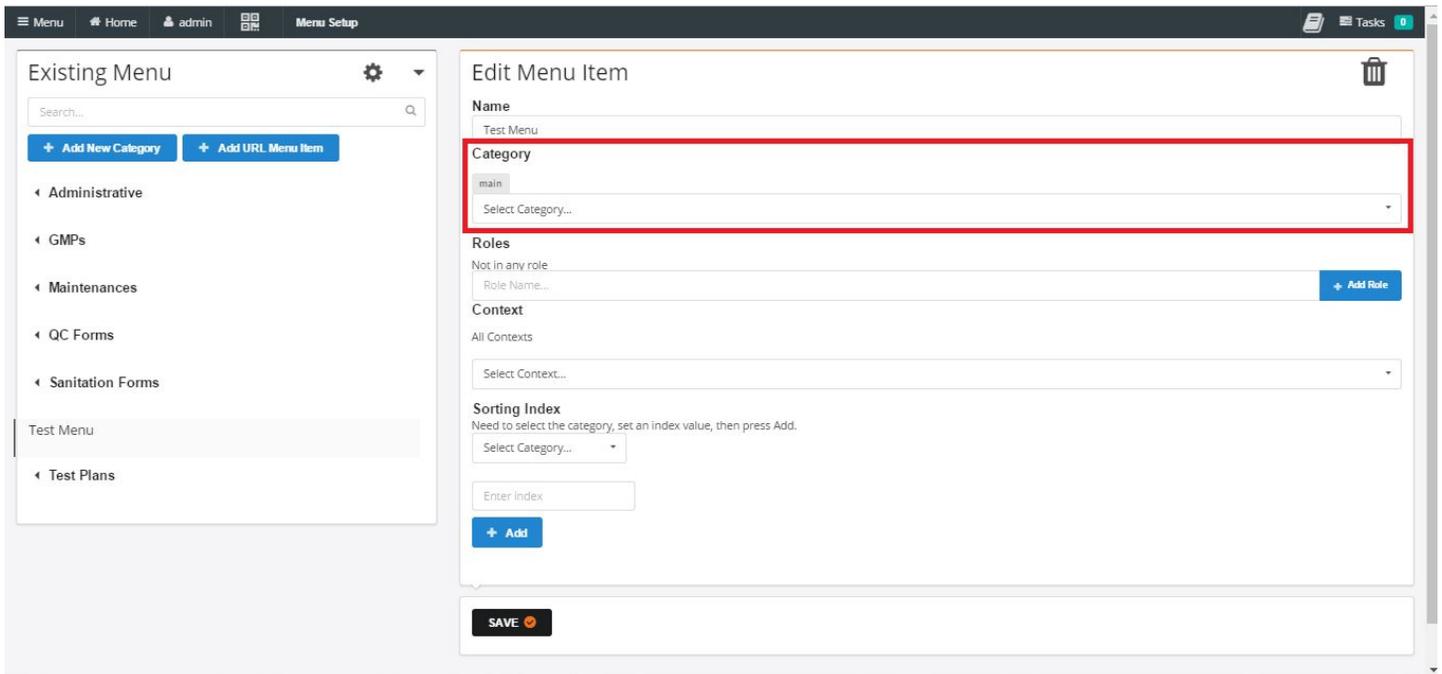
To create a new menu slot,
Select <Add new Category>



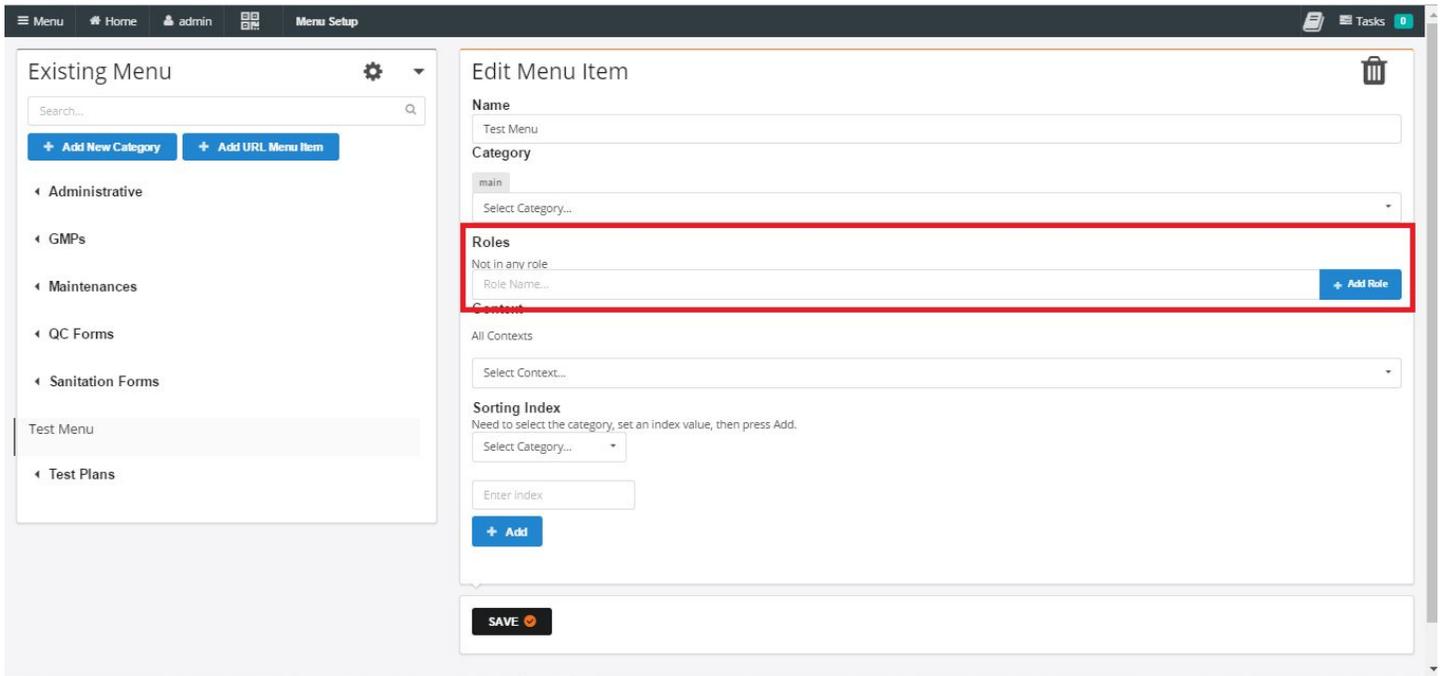
Next, name the new category.



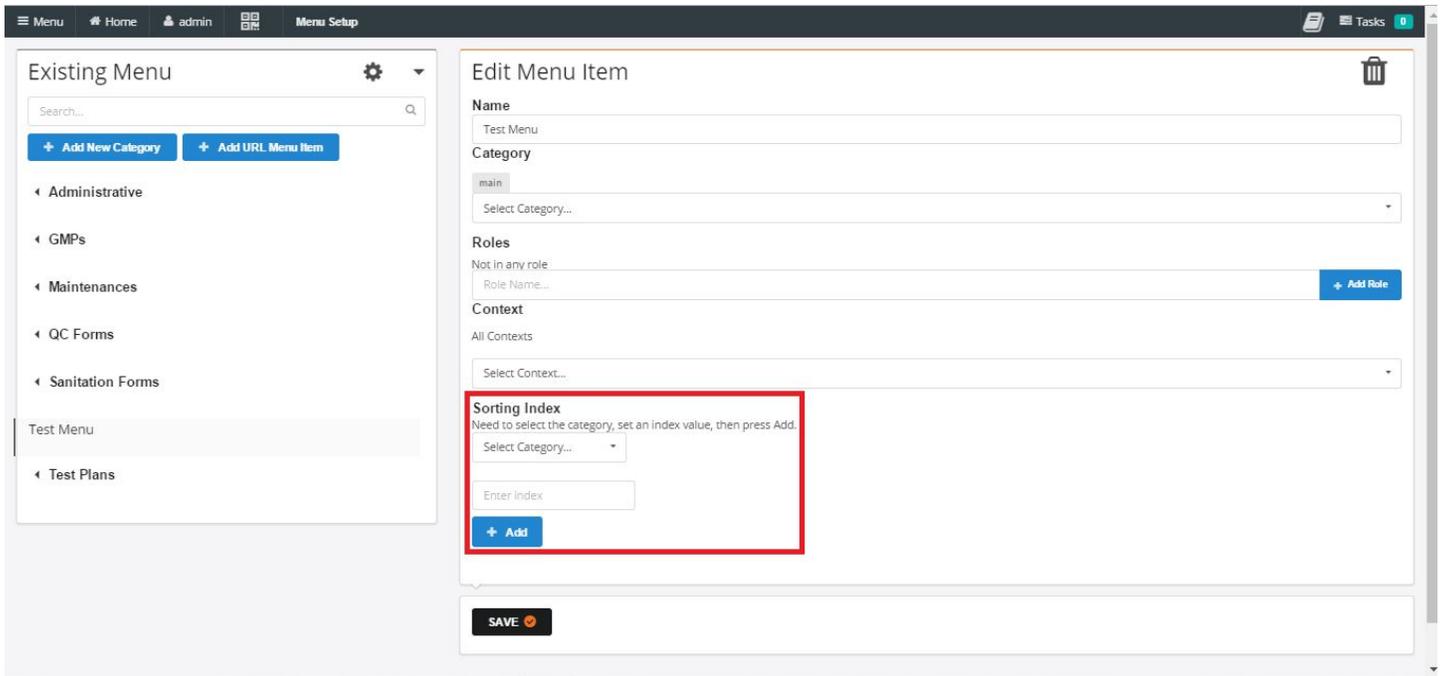
Select a category for your item to reside in. This could be “Main” and the menu item will show up on the main menu slide-out. The user can also choose to place the menu item under an existing menu item.



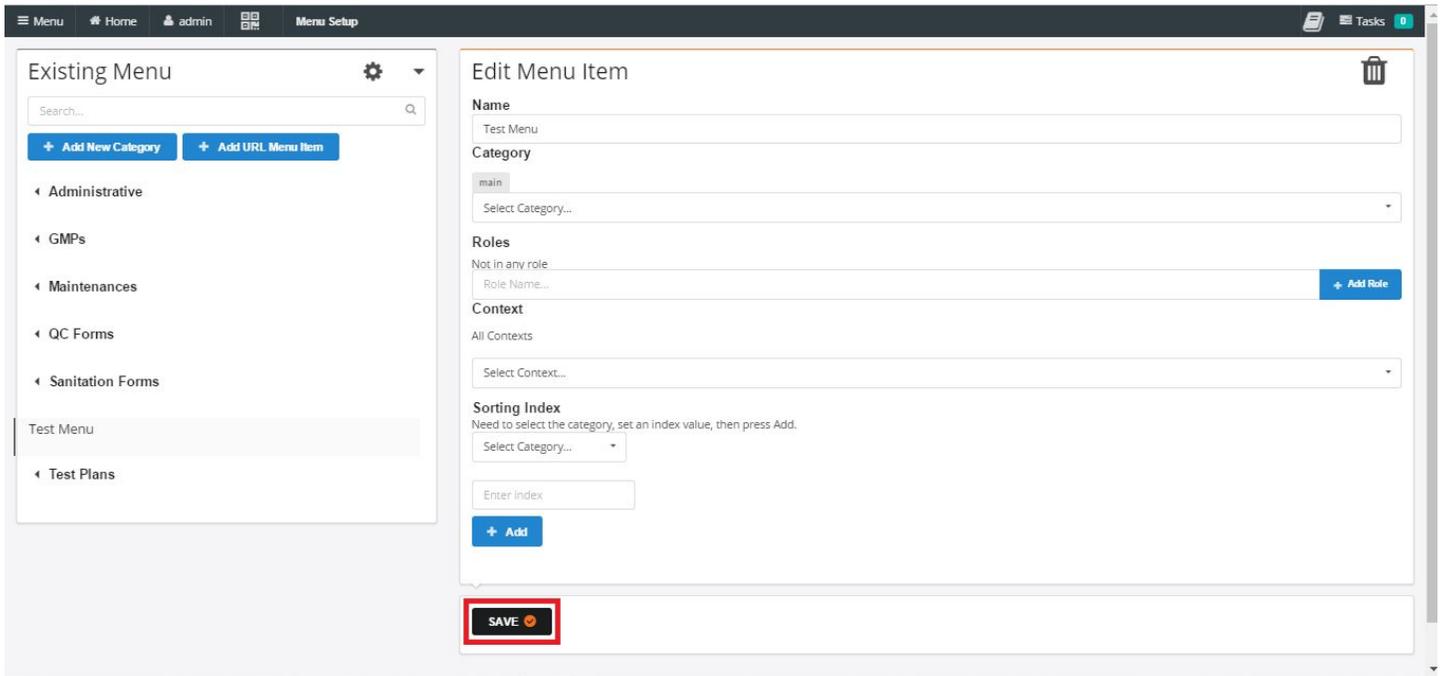
Now select the roles to assign to the menu item, hit <Add Role> to complete. This will regulate who can see the item and make changes. If no role is selected, the menu item will be open to all users.



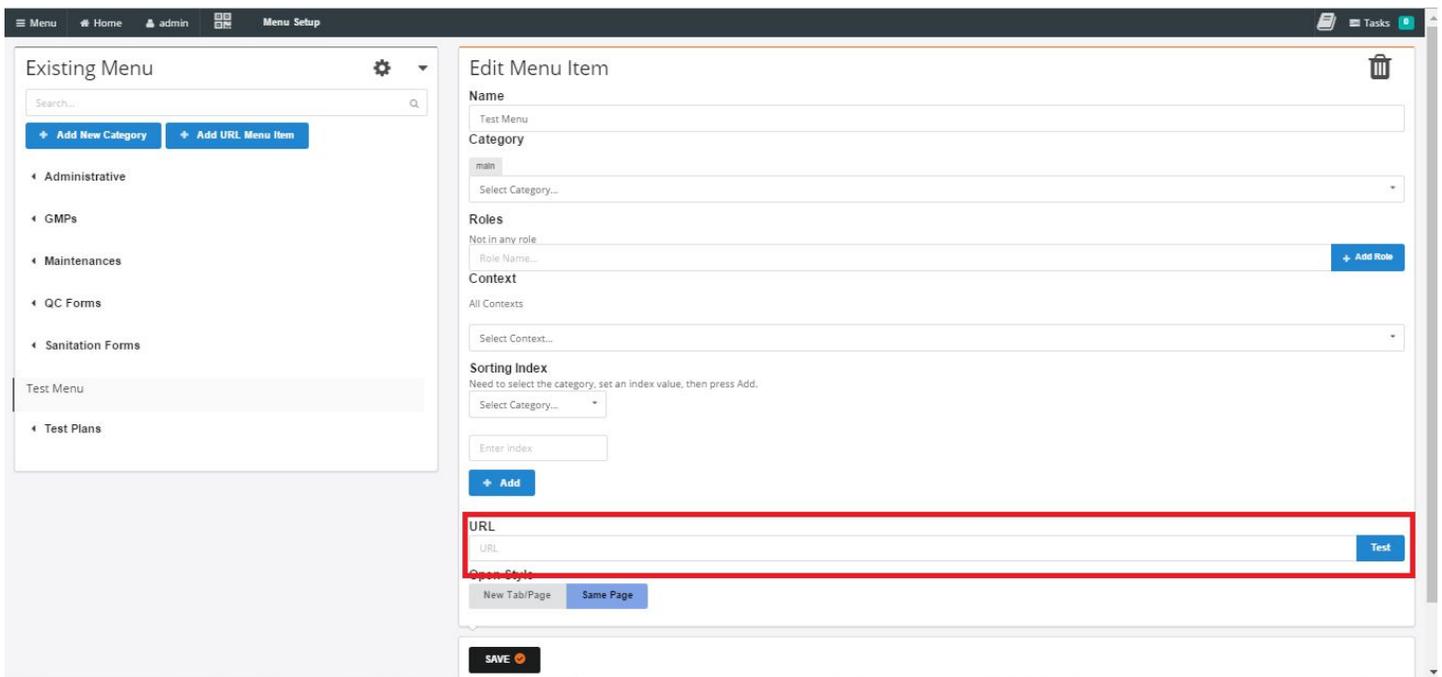
Select a sorting index and an index value for the menu item, hit <Add> to complete.



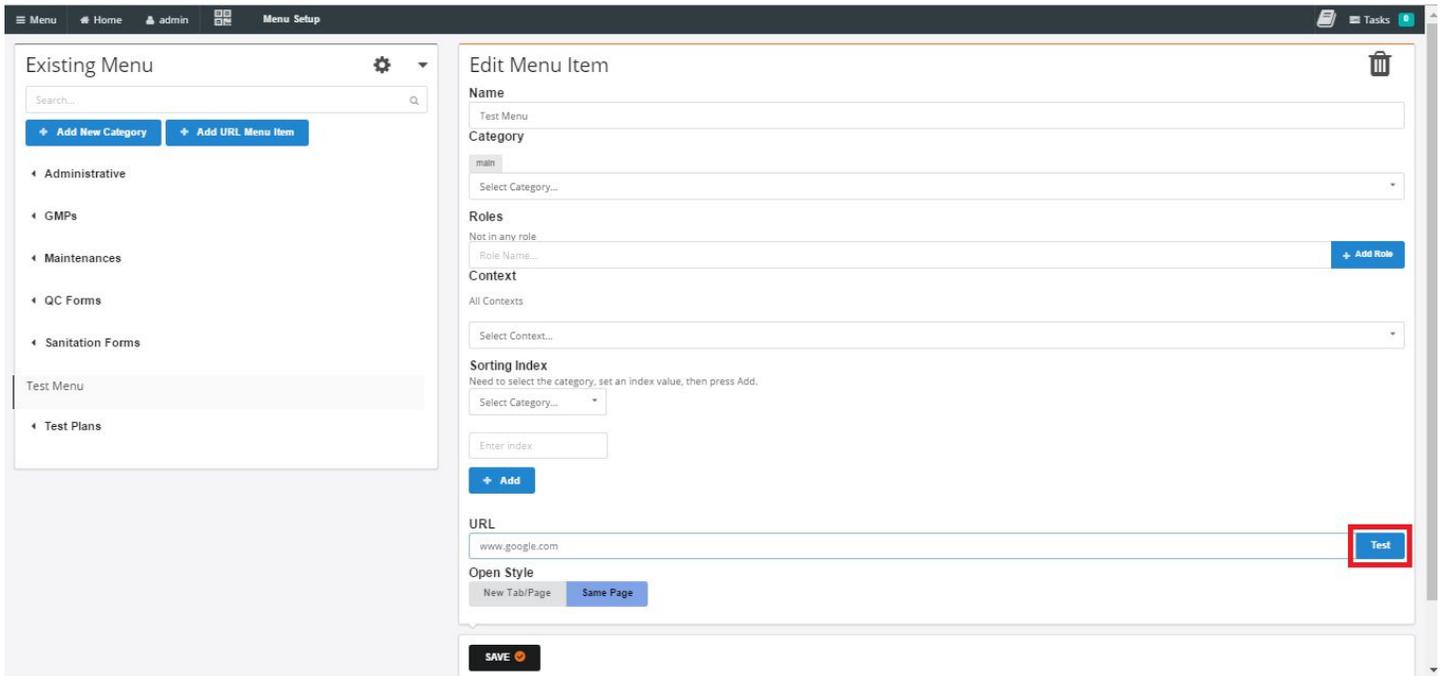
Save the menu created.



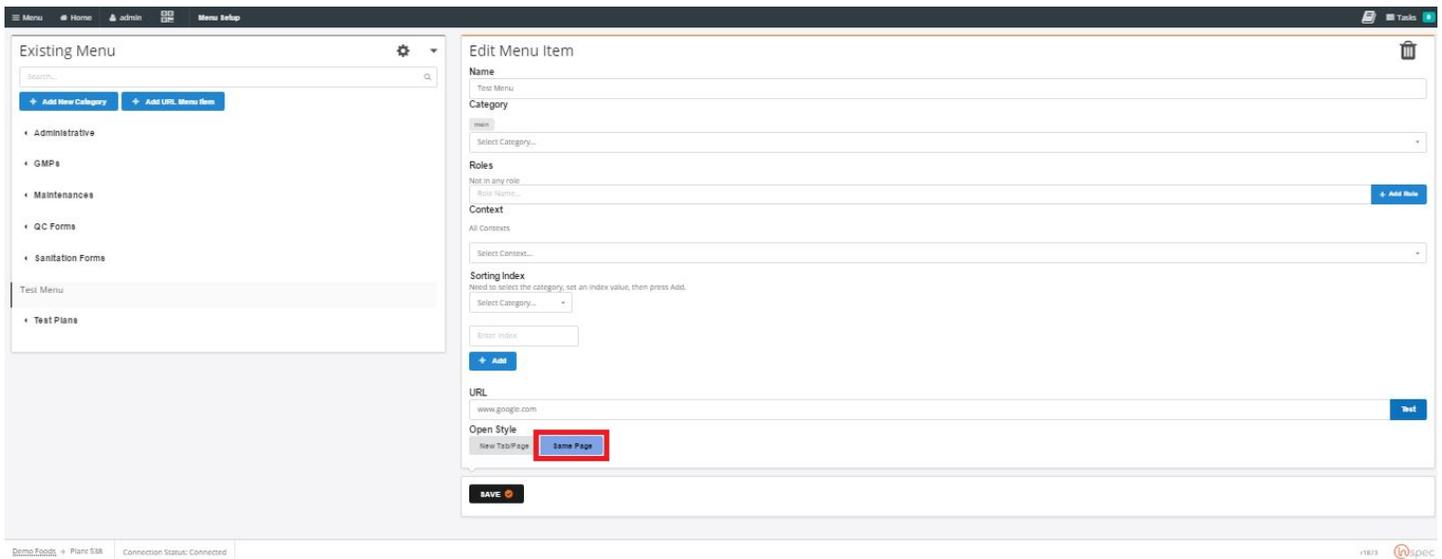
To add a URL driven menu item, follow the procedure for a nonURL driven menu. With the additional steps of adding the desired URL in.

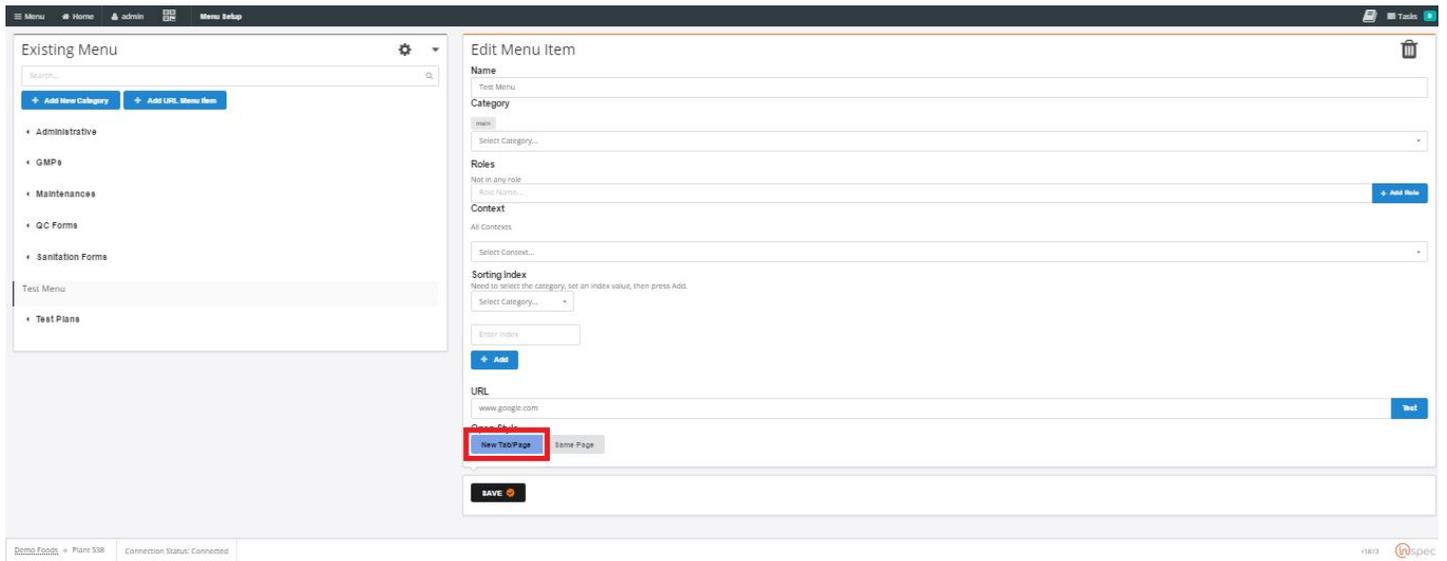


Now test the URL.



Now select the URI opening style. Either open in new browser window or to open in the existing browser window.





Save the menu created.

