Inspec User Guide

ver. 2018-Apr

User Guide to Data Collection

Roles Role Permissions Needed	
Role Value	**Role Name**
userAdmin	User Administrator

Filling out Forms and Collecting Data

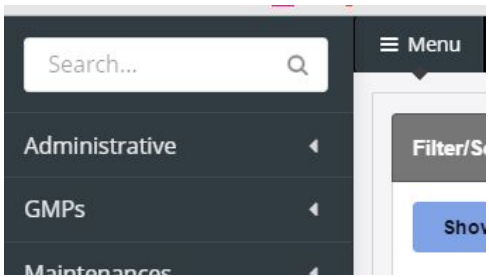
General Screen Navigation

Top Menu

The top menu shows the user 4 drop-down tabs. <Menu>, <home>, <user>, and <QR>.

Menu slide-out

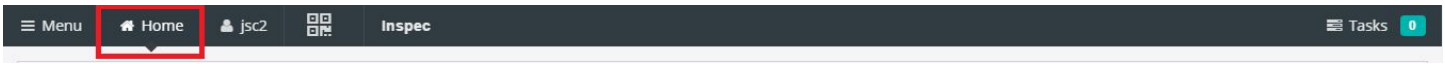
The first tab, <menu> will display a slide-out to further menu options, which will be covered in the next section.



On the menu slide-out the user will see 5 drop-down options. <Administrative>, <GMPs>, <Maintenances>, <QC Forms>, and <Test Plans>. If signed in as an administrator the user will have access to all options and menu slide-out functions. If signed in as a

non-administrator, the user will lack the privilege to access the administrative and maintenances drop-downs.

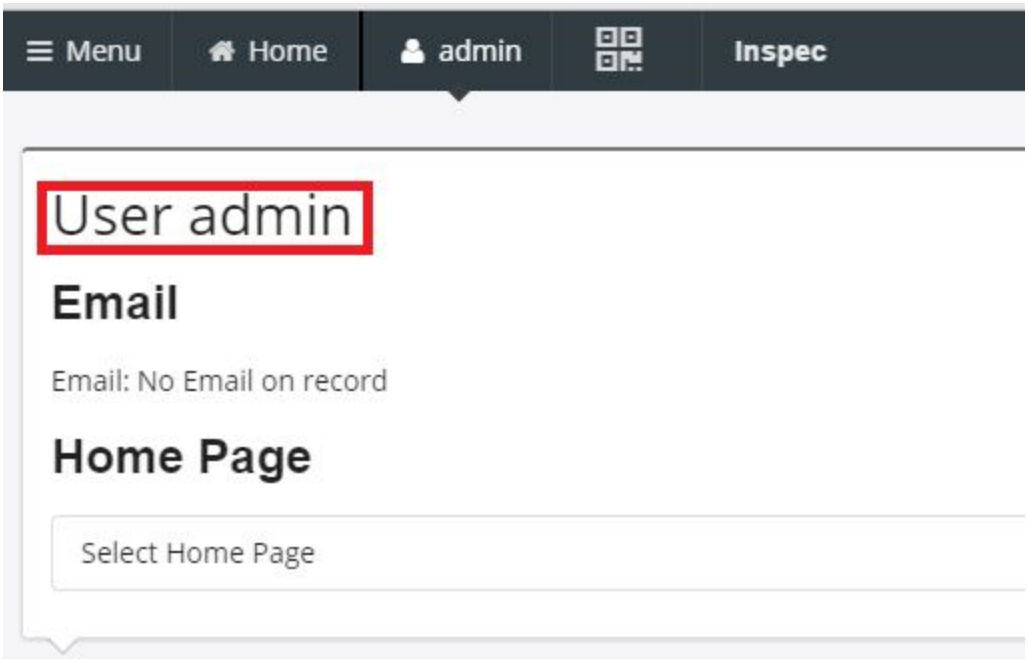
Home Page



The second tab <Home>, will display your homescreen information. This includes a search bar, with filtering options. the specific search options the user can toggle the search being carried out between completed tasks, users, simple or full time, added or a specific due date. The search box also has a text box for keyword searching. A task menu with tasks for the current date. in this section each entry will be listed with the task name, specific form name, status, type, start time expiration time, the task ownership. A recurring task menu that displays other tasks that are not unique to a day or specific time, but that rather occur every day, week, or month. In this section listed under each entry is the task name, form name, expiration time, and task ownership. Next is a task history to show all past tasks. Listed after the specific task will be the form name, status, expiration time, and who the task was assigned to.

User Page

The user section will display your login ID in the section header.



In this section your associated email and your preferred loading page will be shown. Your selected loading

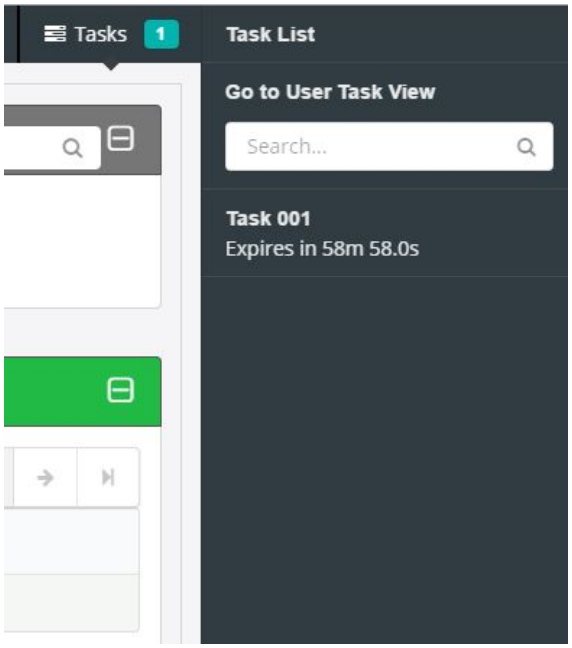
page will dictate what page is presented when the user logs into Inspec. This feature can be used to streamline work and avoid unnecessary navigation. In the roles & role groups section the user will see the specific role assigned to them, by the administrator. If the user is logged in as an administrator you will be able to add and subtract roles as needed. The context section reflects the company's roles and actions.

QR Barcode

The <QR> tab can be used to travel to the loaded screen on another device, once scanned.

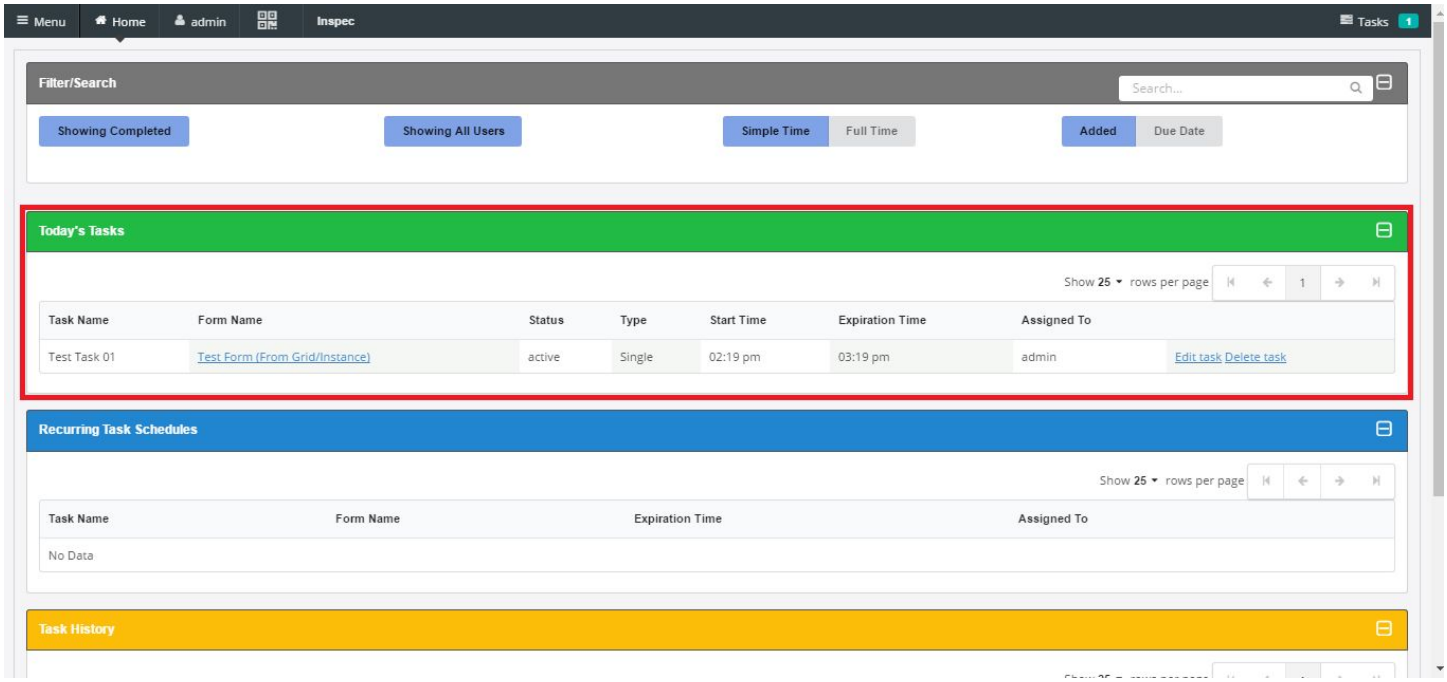
Tasks slide-out

The task slide-out provides a quick look into the user's assigned tasks. It will list any currently present tasks with the task name and the time until task expiration. This window will always be present.



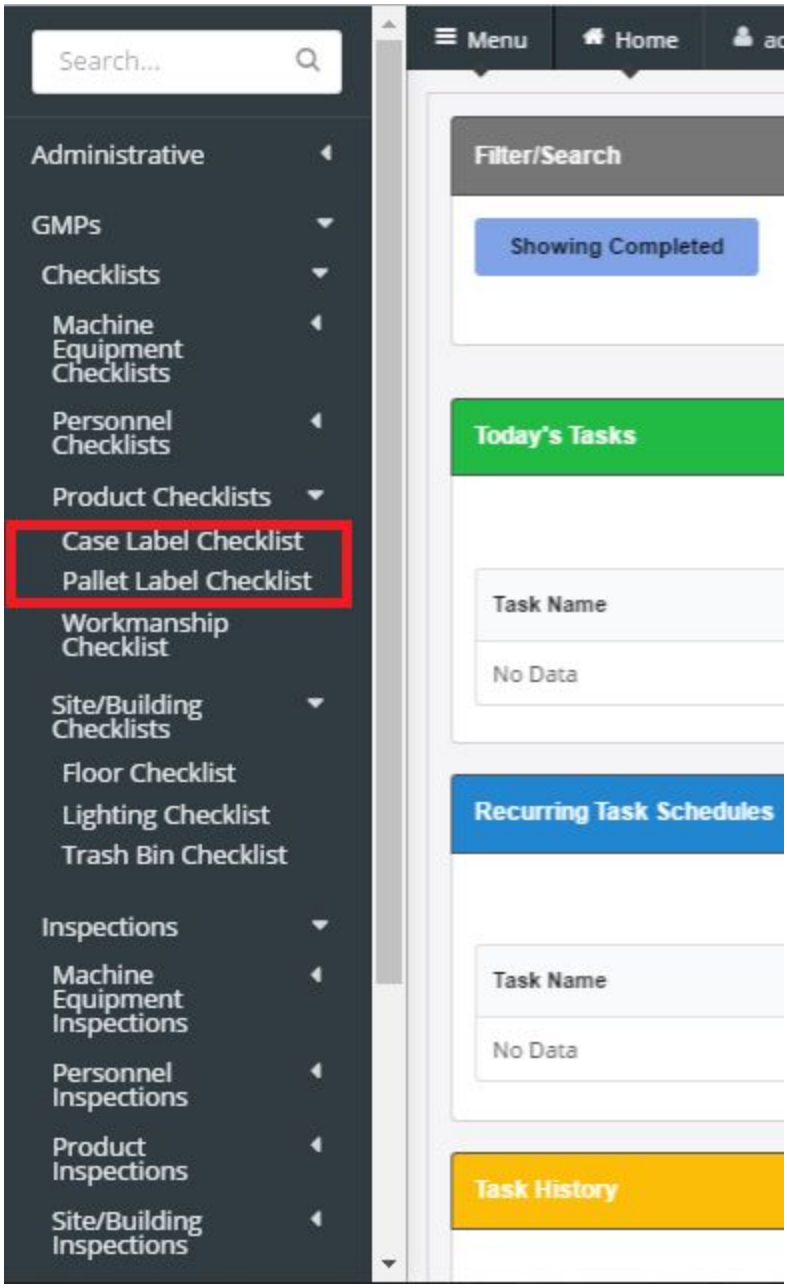
Task initiated forms

A Task initiated form will prompt the user to complete a task, or set of tasks, that have been assigned to that user or a group the user belongs to. These tasks can be seen in the user's home page or the tasks shortcut in the top menu bar. Visit the user home page, under “today’s Tasks”, to access the assigned task(s).

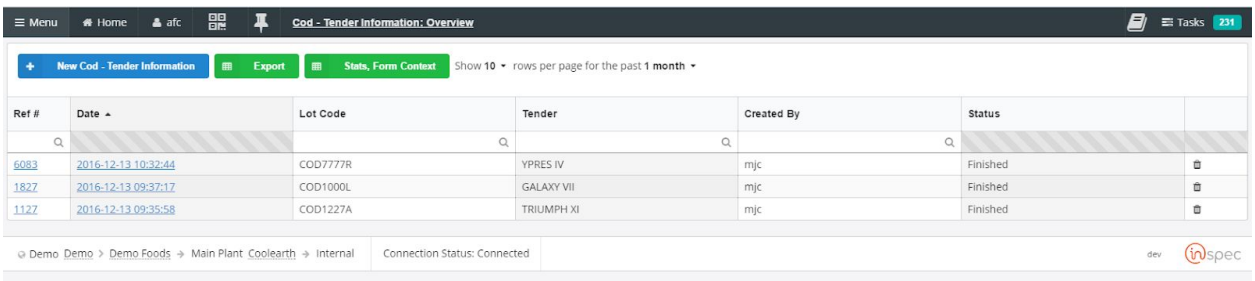


User initiated forms

From the Main Menu, select the form you want to fill out by clicking on it.



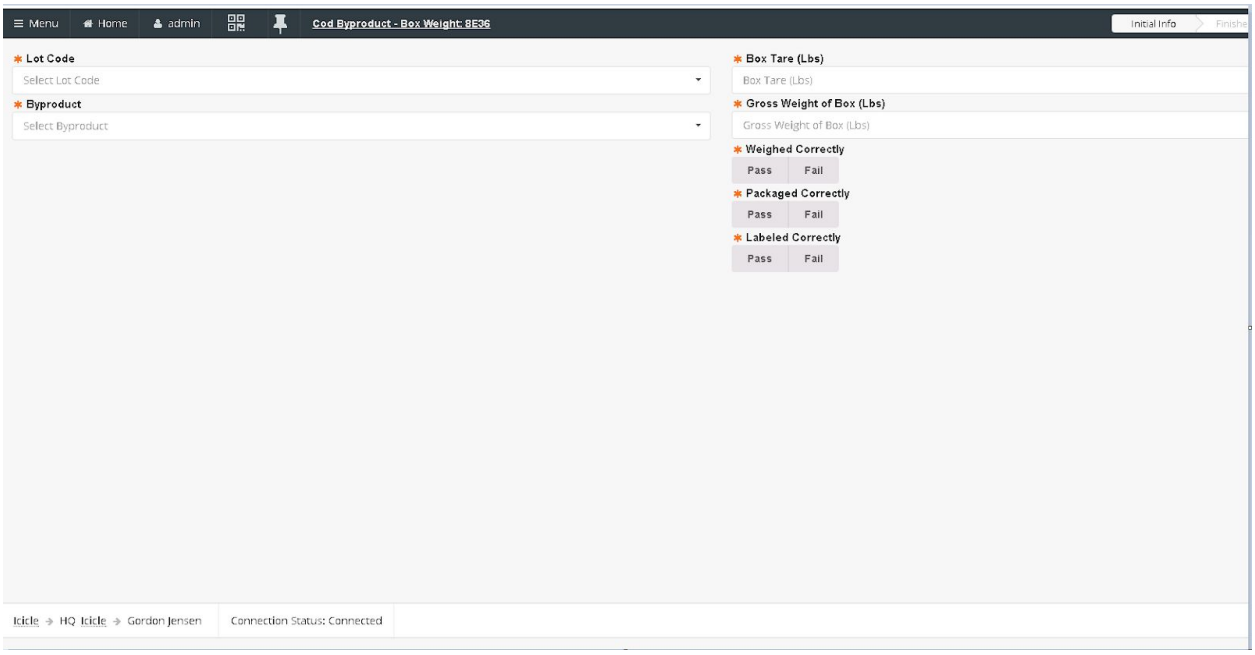
You will be taken to the Form Header Grid for that form.



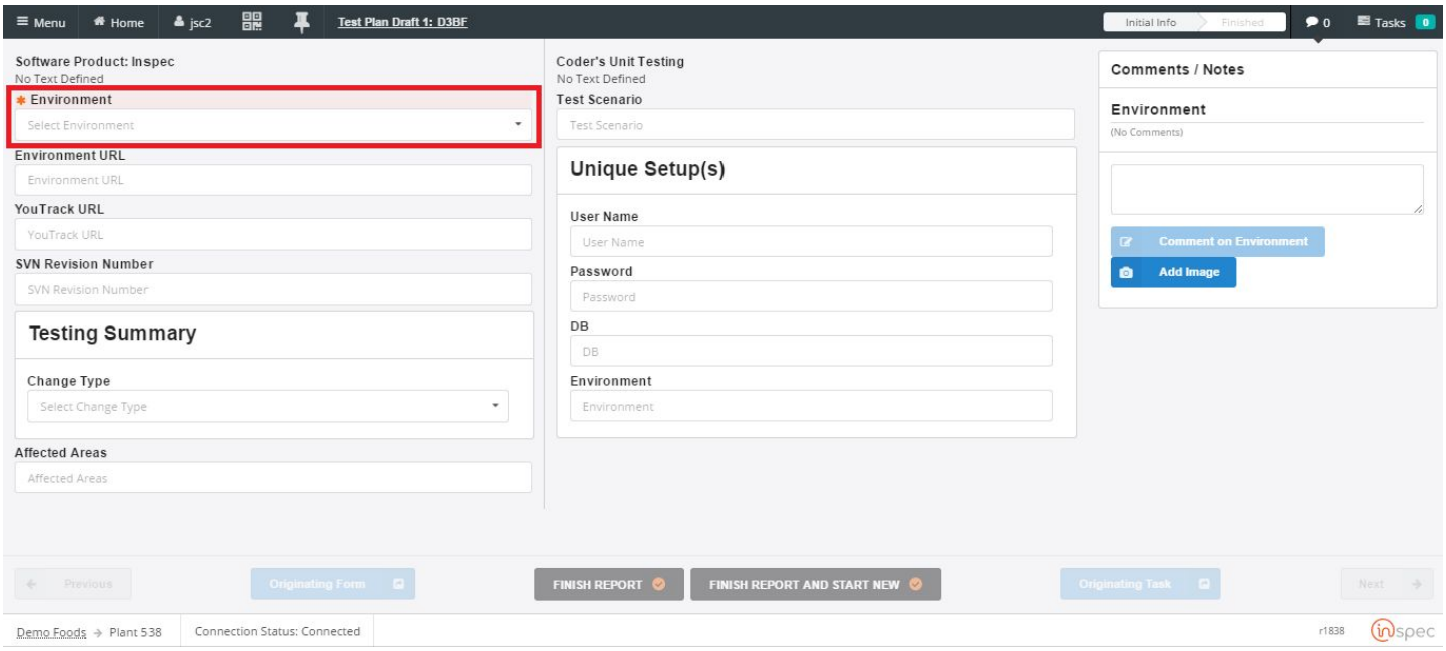
This grid displays all instances of that form in accordance with the selection criteria set at the top of the page (how many rows to display per page).

To select an existing form, just click on the desired form in the Ref# (Reference) column. If a form is in the Finished state (all mandatory fields filled in, FINISH REPORT button pressed), you will be able to view the data, but not make any changes. If it is not in the Finished state, you will be able to make changes to the data.

To create a new form, press the New <name of form> button at the top of the page. You will be taken to a new instance of that form.

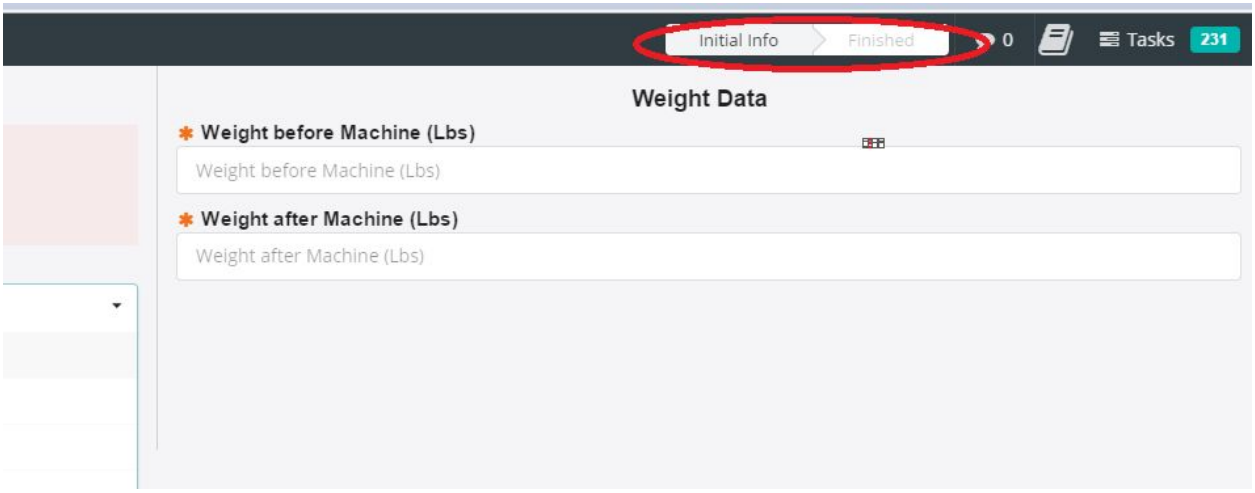


Fill out the form. If a field has a star by it, it signifies a mandatory field. All mandatory fields must be filled out before a form can be completed.

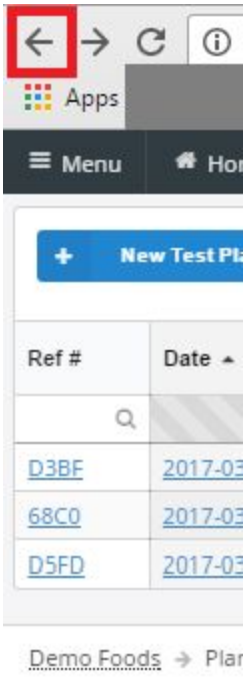


Once all the mandatory fields have been filled in, the FINISH REPORT button at the bottom of the screen will become available.

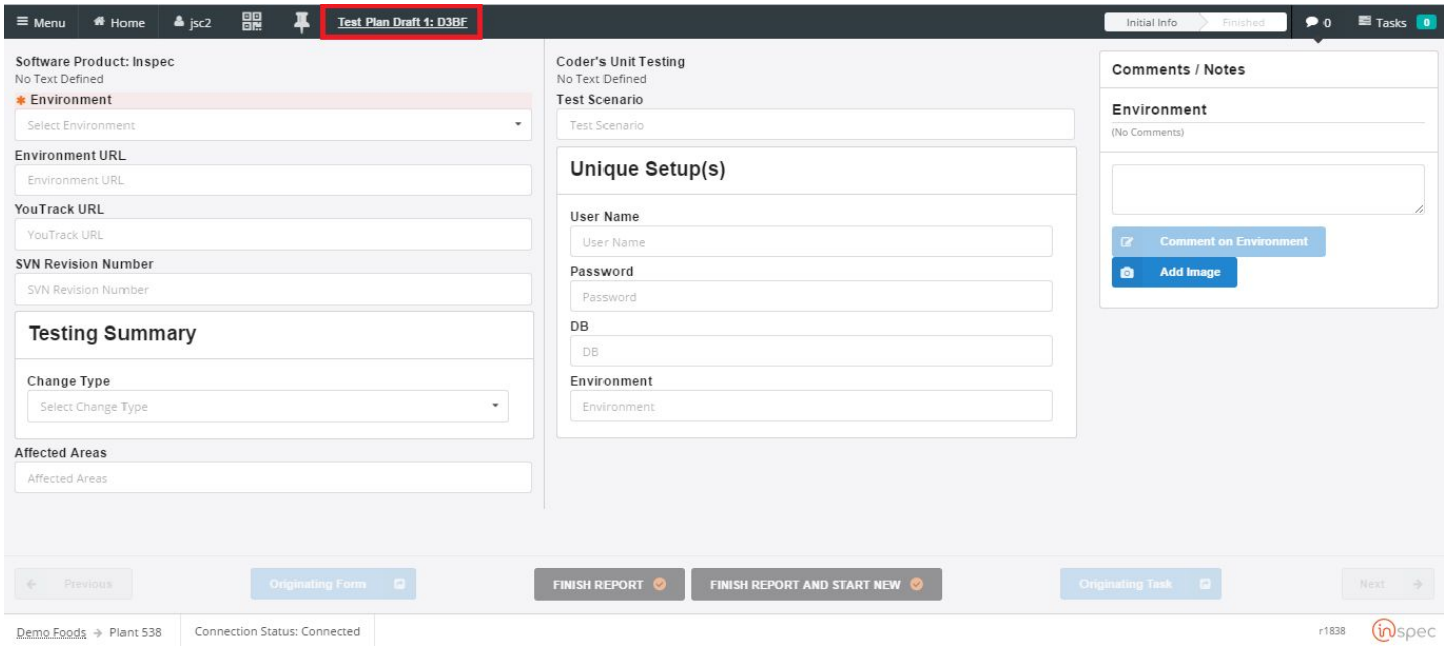
The status bar at the top of the screen will let you know what state you are in. For most forms, there will only be Initial Info and Finished. The States of a form can be set up in the Form Designer, in the Edit Workflow tab.



Prior to pressing the FINISH REPORT button, there are two ways to leave the form. One is to press the back button on the browser screen.



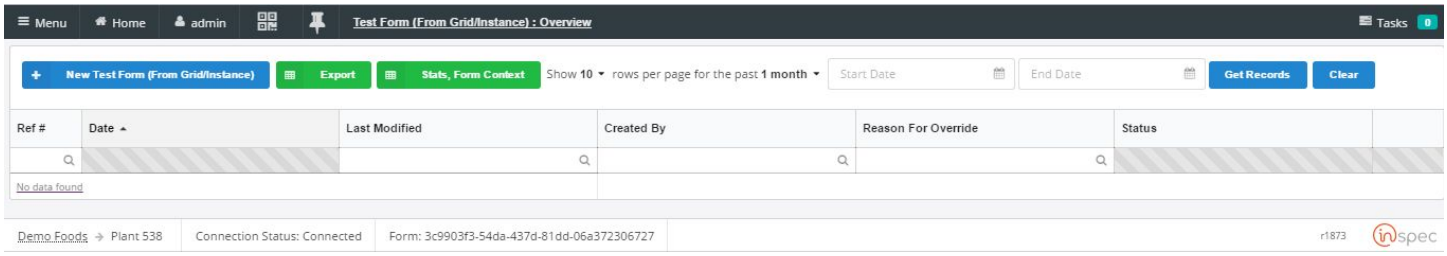
The other is to select the form name at the top of the screen, in the middle section. By clicking on this link, or pressing the back button, you will be returned to the Form Header Grid screen.



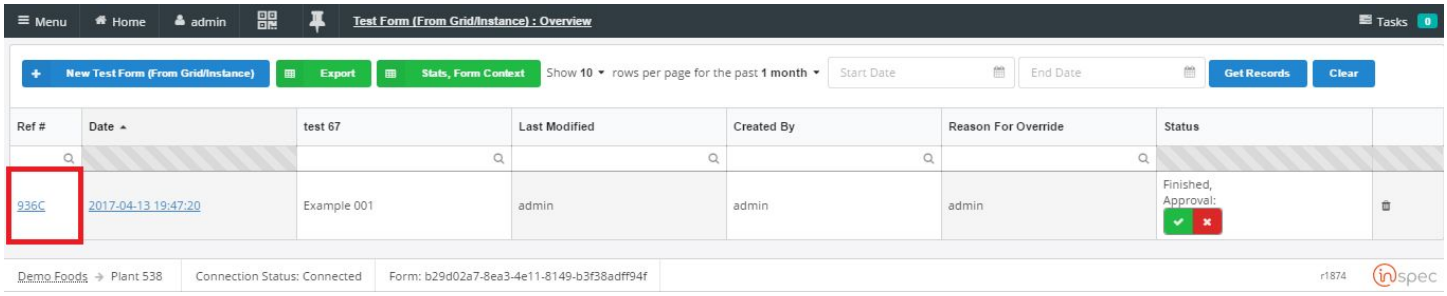
The Form Grid

The form grid is where the user can see all existing instances of the form, who it was created by, who last modified it, the form's status, and reason for override. A form instance may also be deleted by the user here.

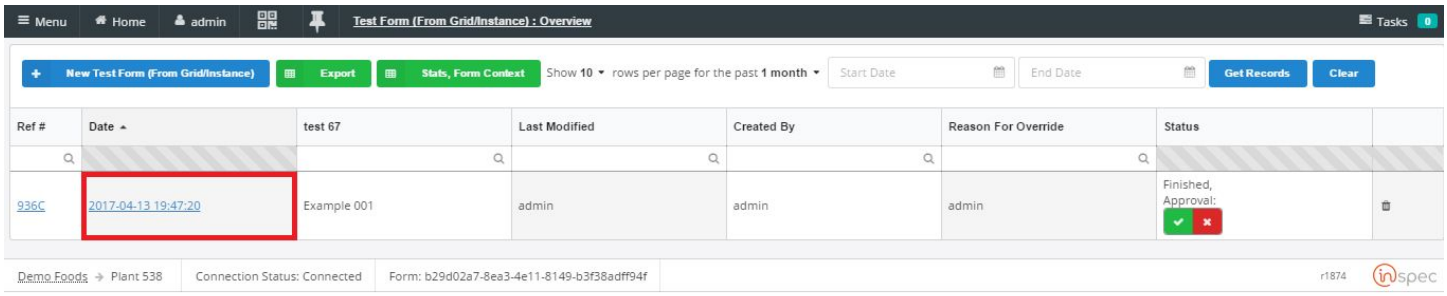
The form grid.



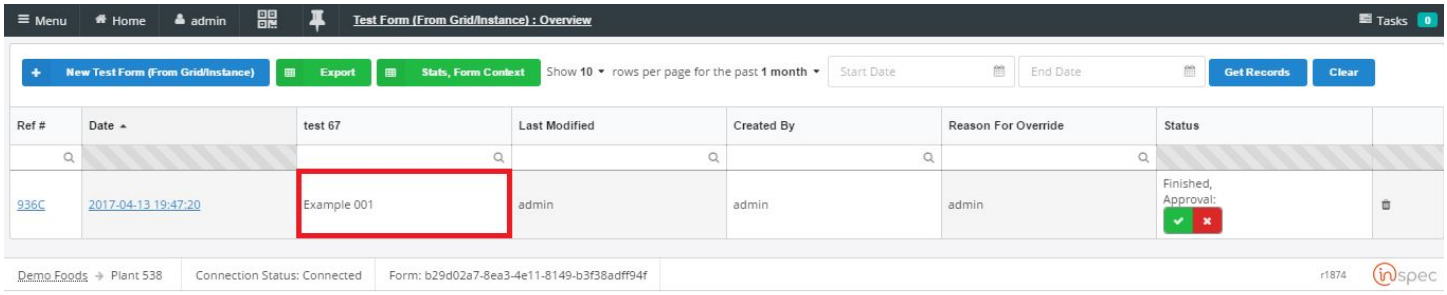
The reference number.



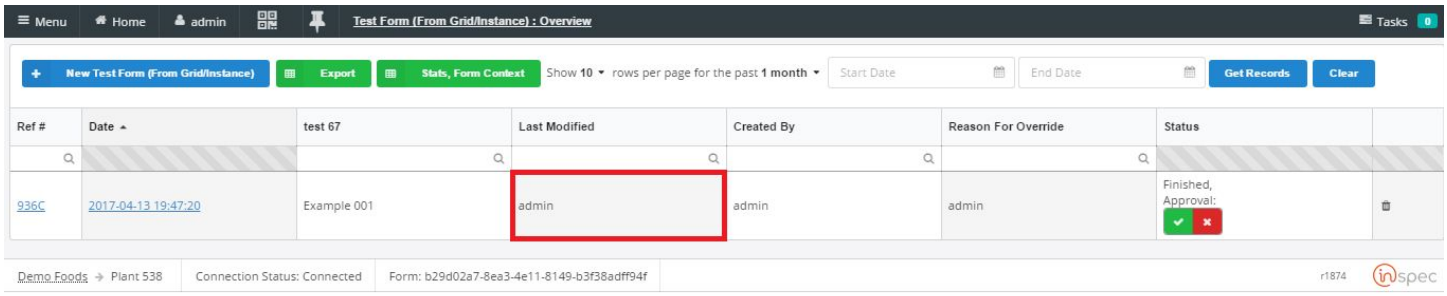
The forms completion/modification date.



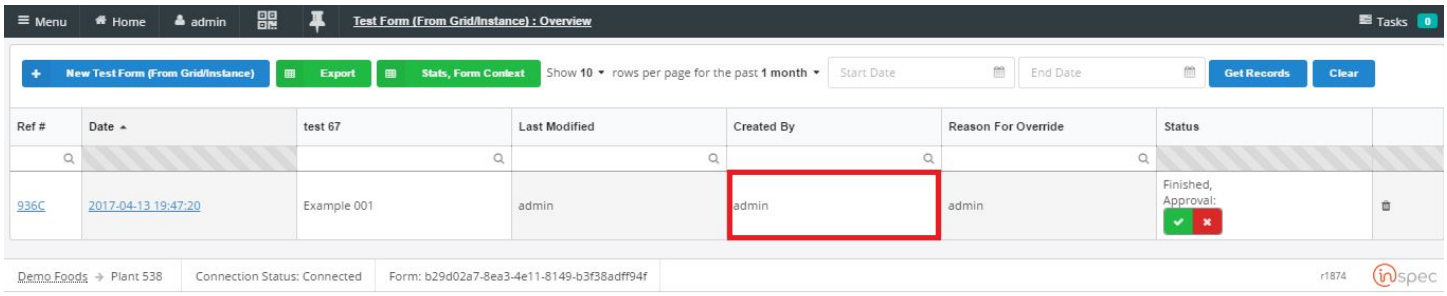
The form's control name.



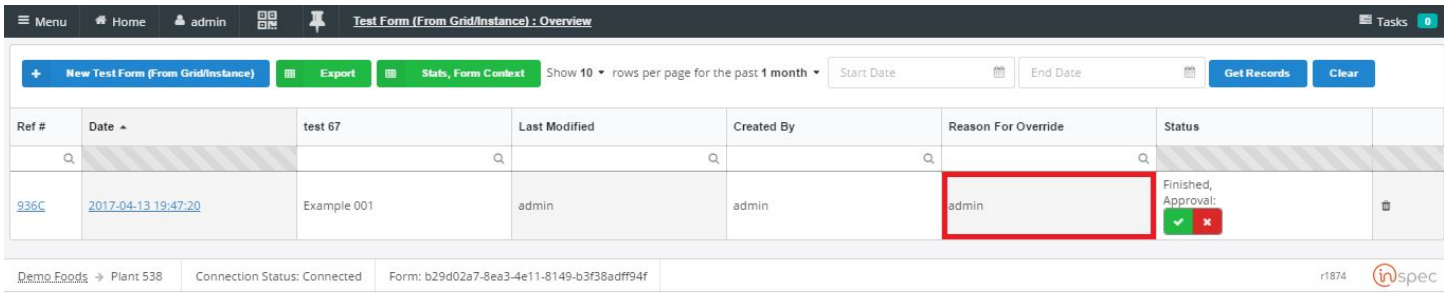
Form's last modification user.



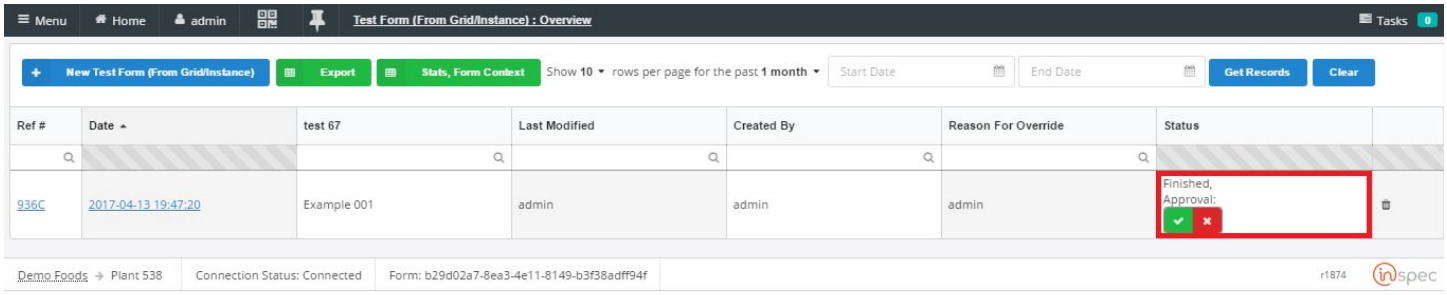
The form's creator.



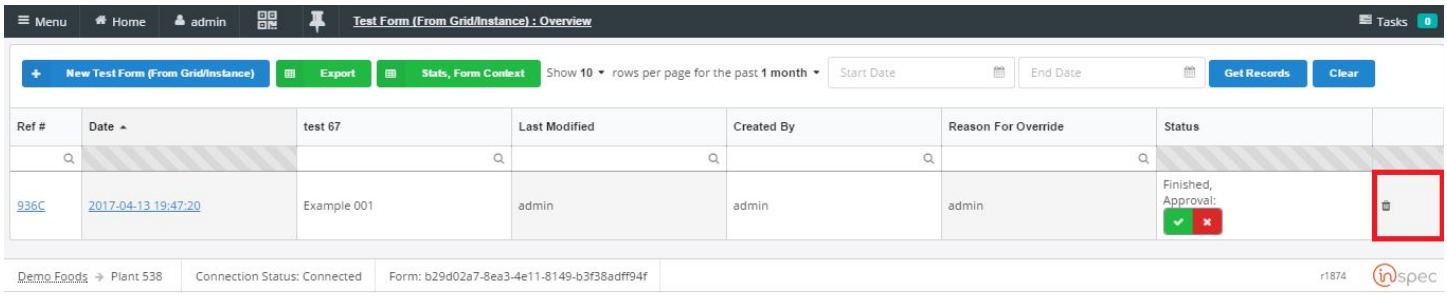
The reason for forms override.



The status of the form.



The function to delete the form.



The Form Instance

The form instance is where the user can view a specific form and its details. In this section form window and instance navigation will be displayed.

Form Navigation

Top Menu

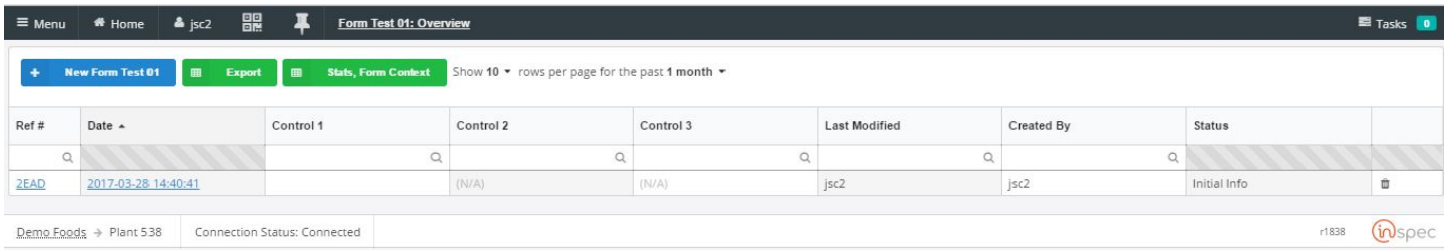
The top menu in a form will have the previous options (<Menu>, <Home>, <User>, and <QR>) with added options. See General Screen Navigation for these previous options.

Thumb-Tack (Sticky)

The thumb tack acts as a constant settings function. When performed this function will enable the user to save form data settings to be used in a new form instance.

Grid Link

The grid link will take the user away from the opened form and bring them back to the form grid overview.



Workflow Indicator

The work flow indicator shows the user the overriding steps involved in completing the specific form.

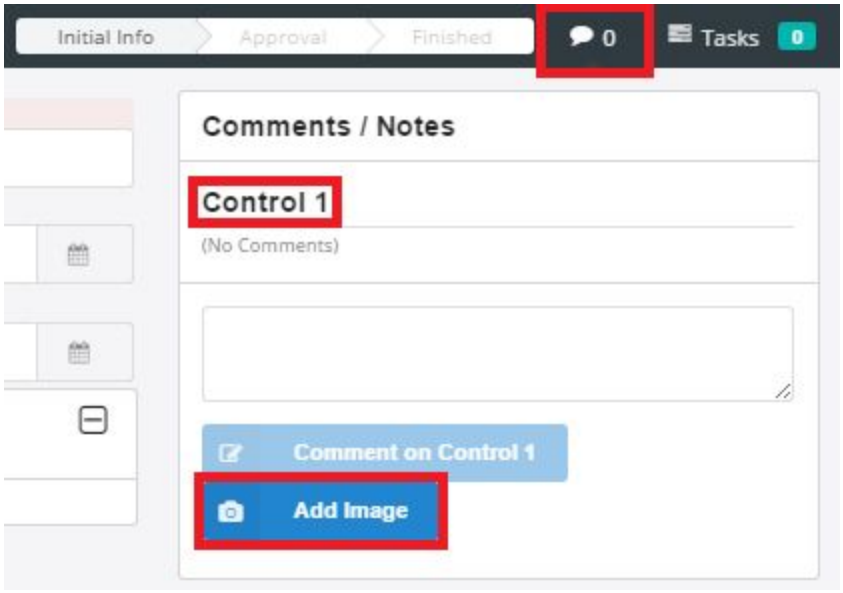
In the figure above the workflow indicator shows that once the form's initial information has been filled in, the form can be completed.

In the figure above the workflow indicator shows that with this specific form the initial information needs to be filled out, the the form must go through approval, and then the form can be completed.

Form Comments

The form comments tab allows users to comment on their form and form information while still in the form, keeping comments in house.

The user can add images to their comments for others to see relevant information. Comments can also be added in reference to specific controls in the form.



Form Documentation

Bottom Footer Information

Context

Connection Status

The connection status bar displays the user's connection quality to the software.

Form ID

The form ID will only be available when the user is logged in as an administrator.

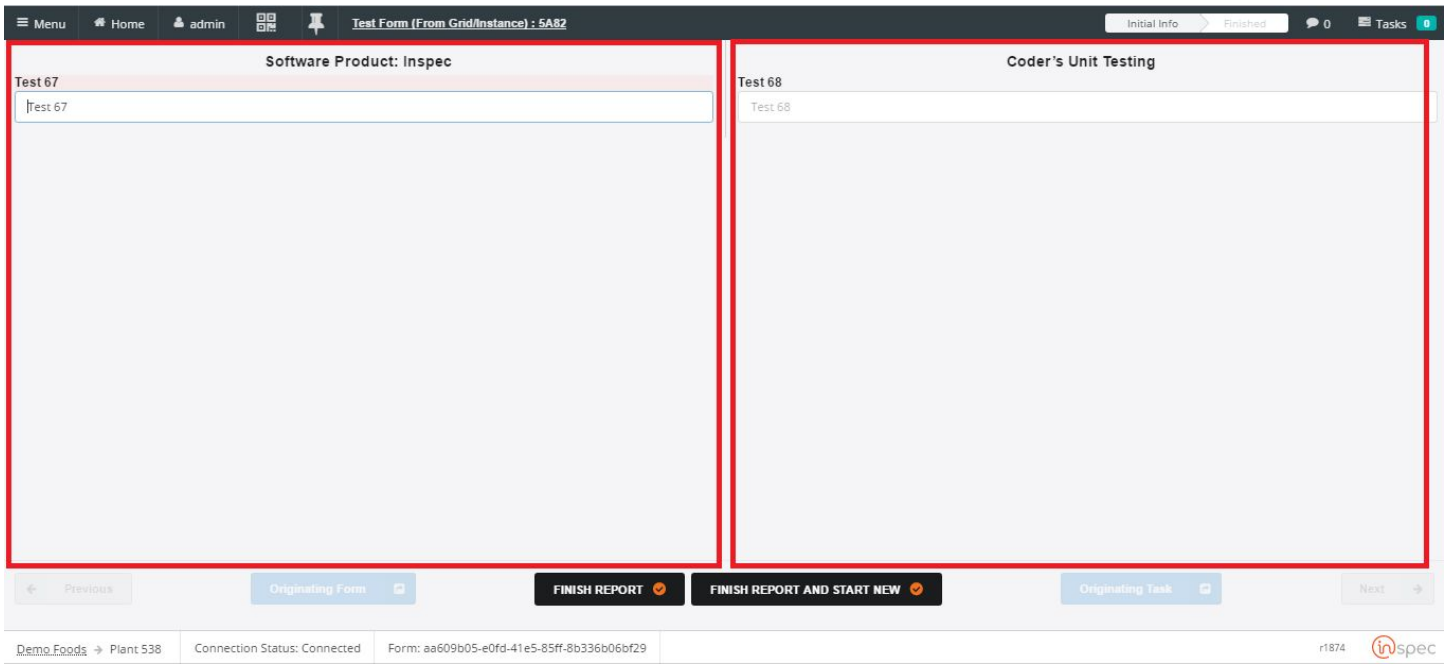
Version Number

The version number reflects the specific updated version of the form being viewed.

Columns

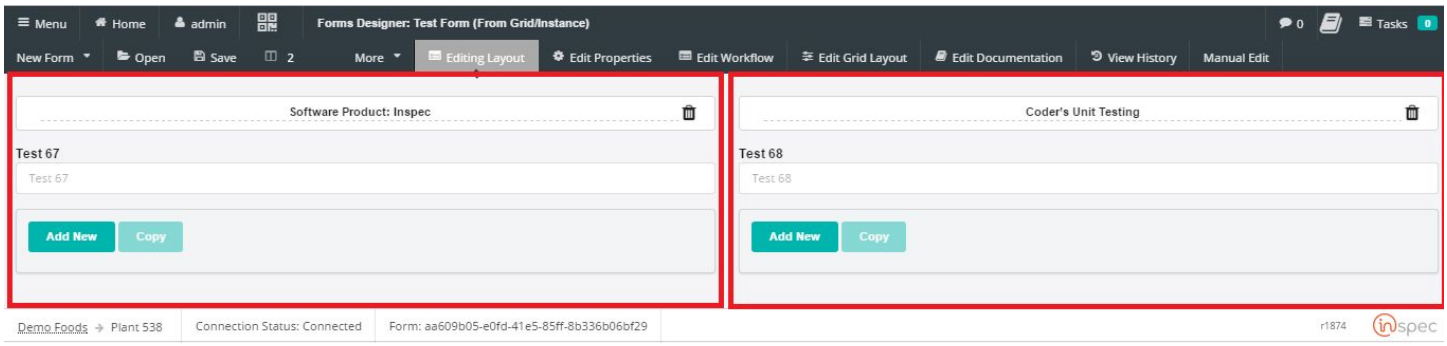
User View:

Columns provide a way to separate data in a form and may be used to guide the user during data collection. In This figure there are two columns, “Software Product: Inspec” and “Coder’s Unit Testing”.



Form Designer View:

Columns are used to separate specific data in forms, much like rows. The number of columns in a form is selected by the user creating the form. The number of columns can be toggled by moving the <column tab> up or down, or manually entering a number.



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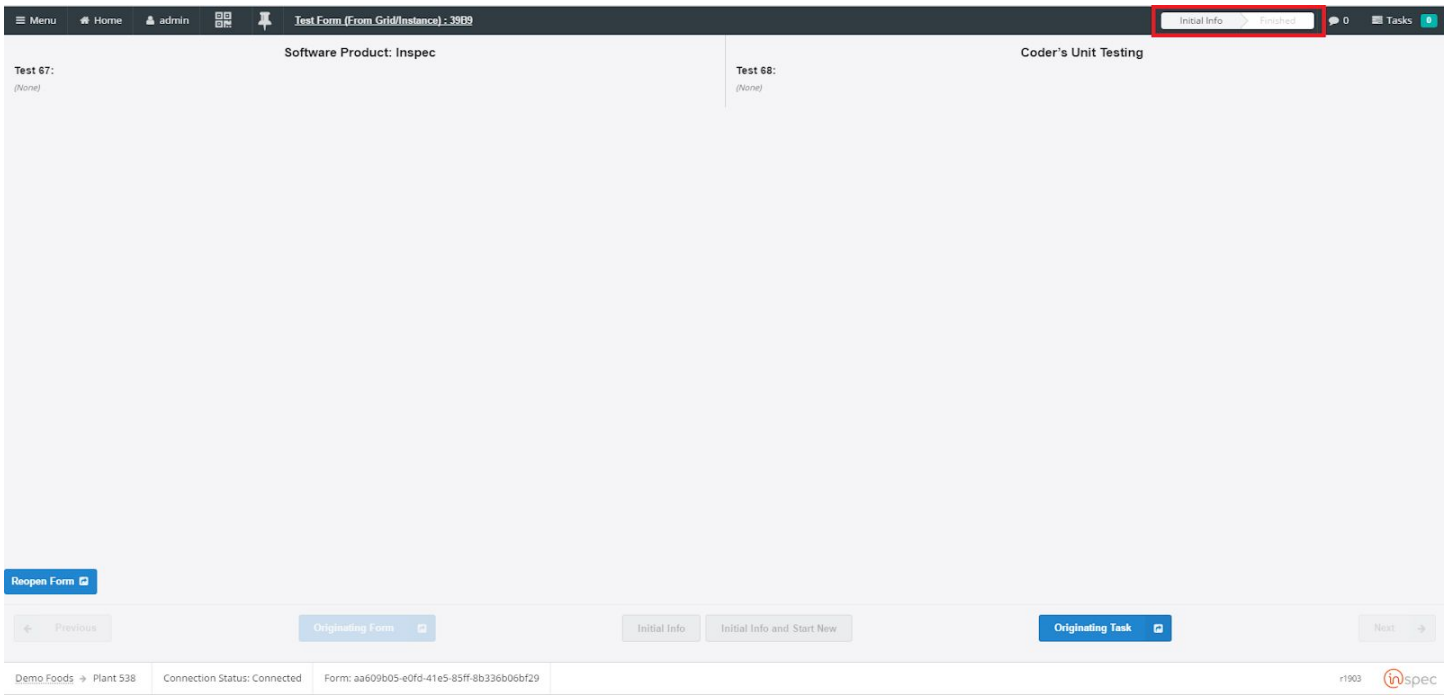
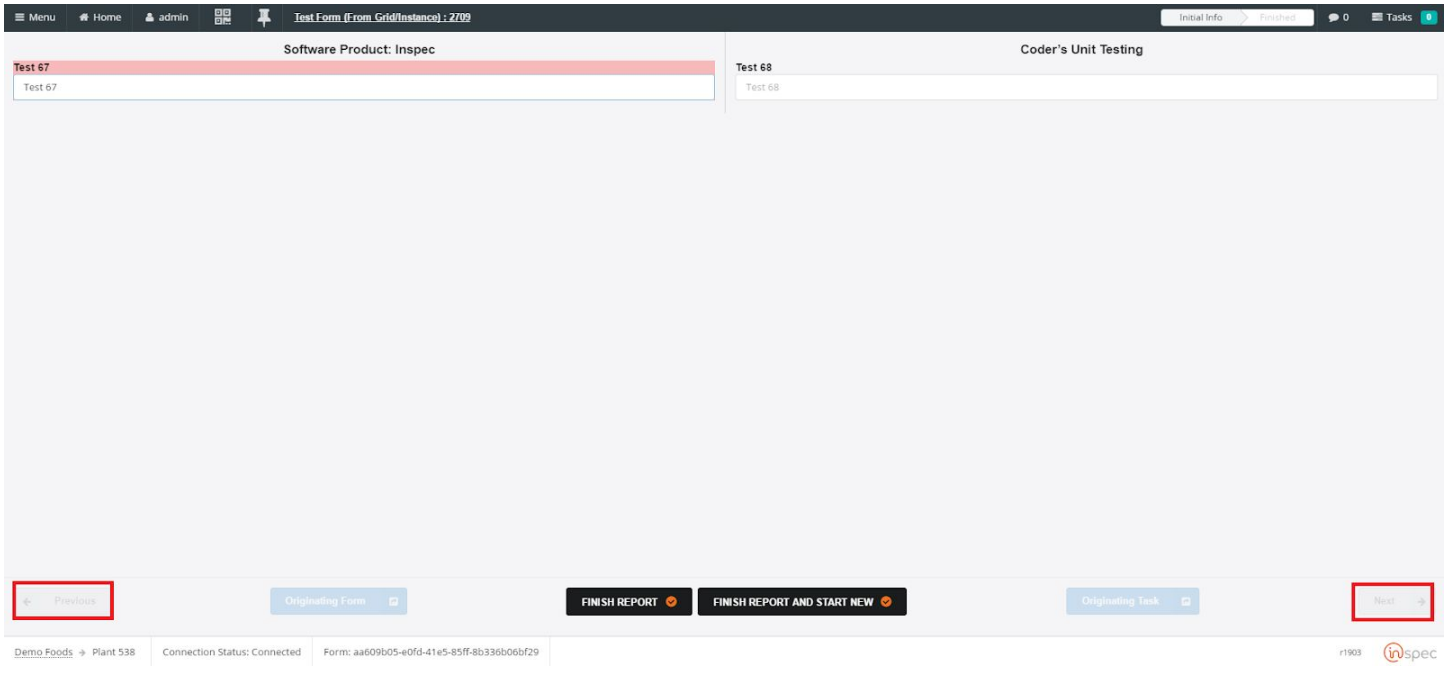
Workflow



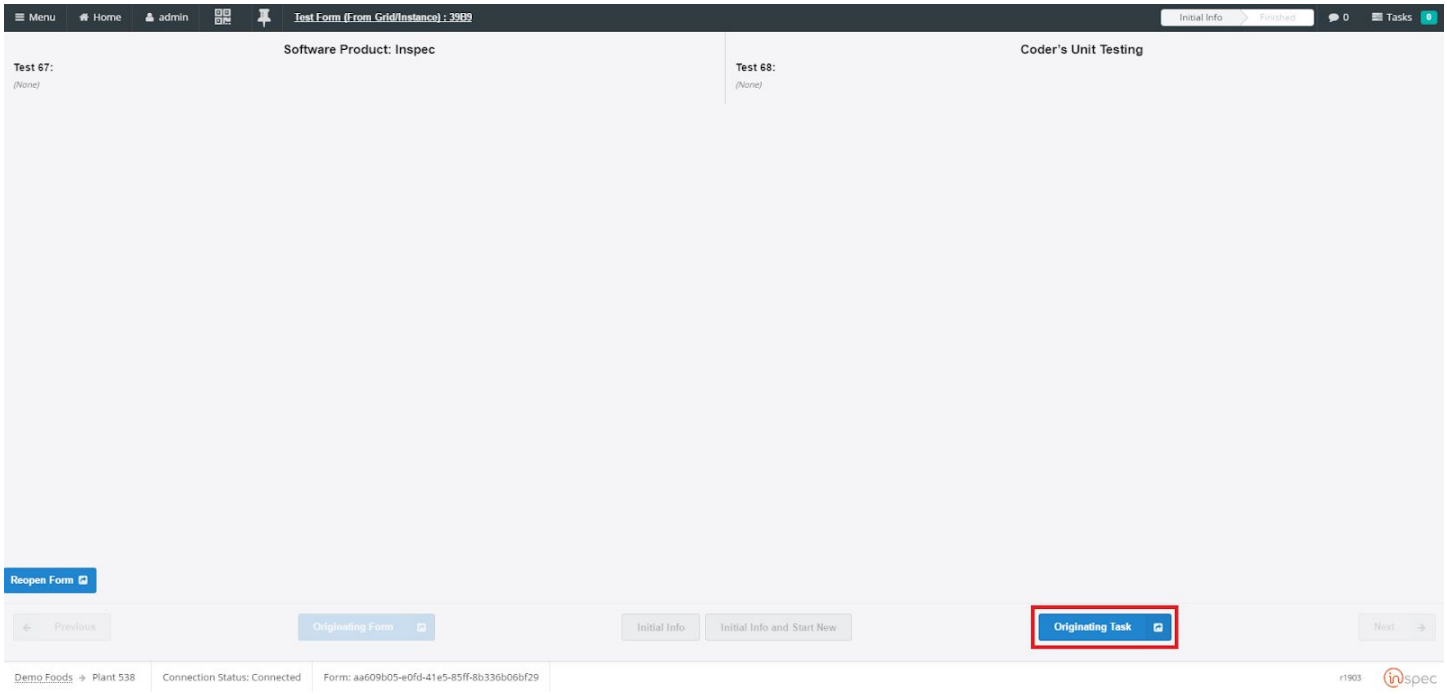
Action Buttons

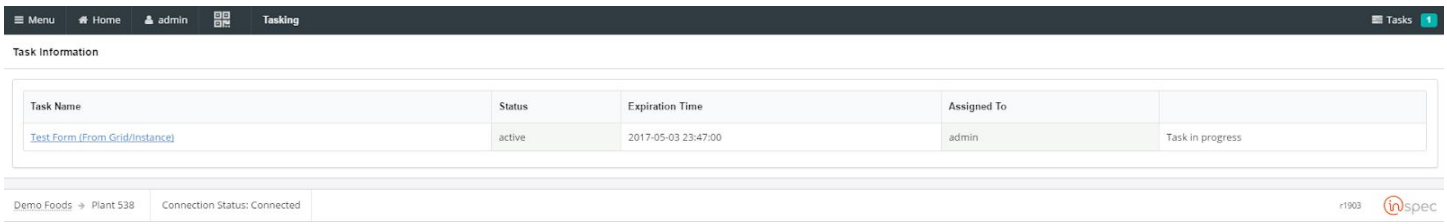
Previous/Next



Originating Task

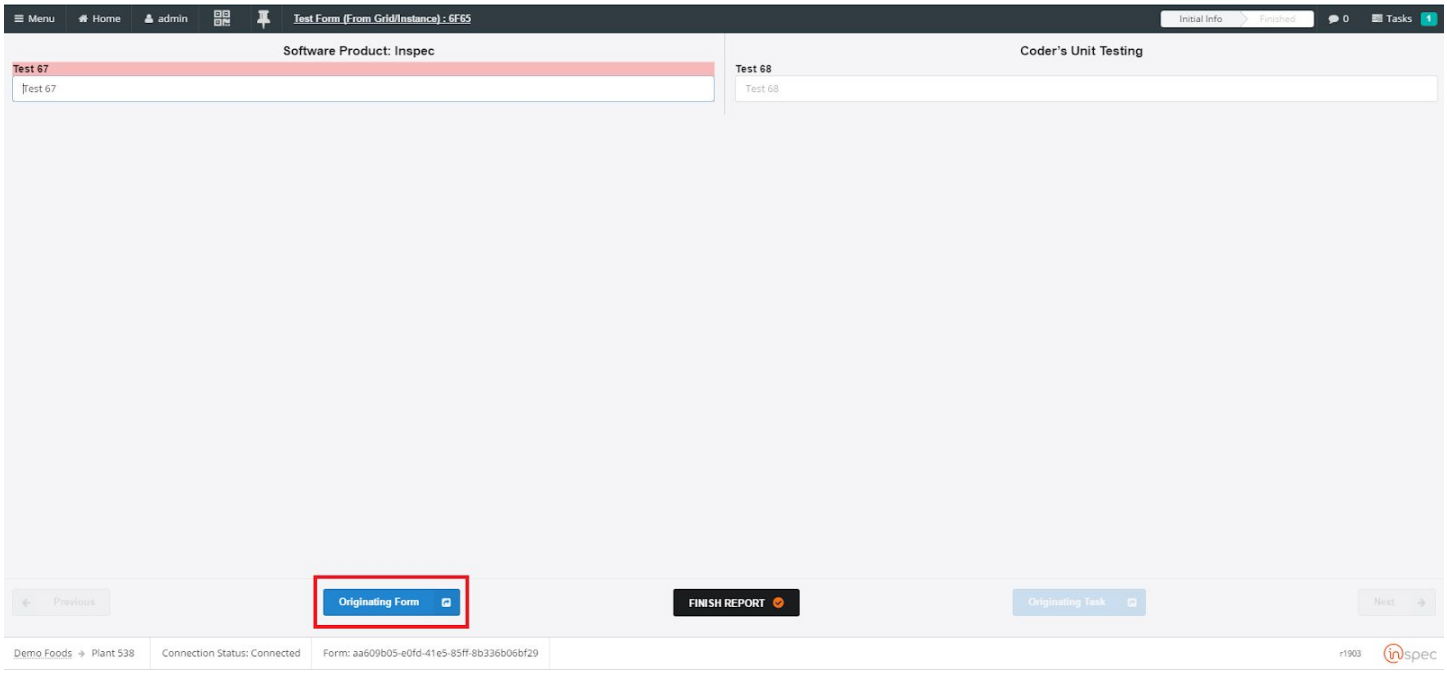
The originating task button will show the user what task assigned the form. The originating task button will only be available when it applies.

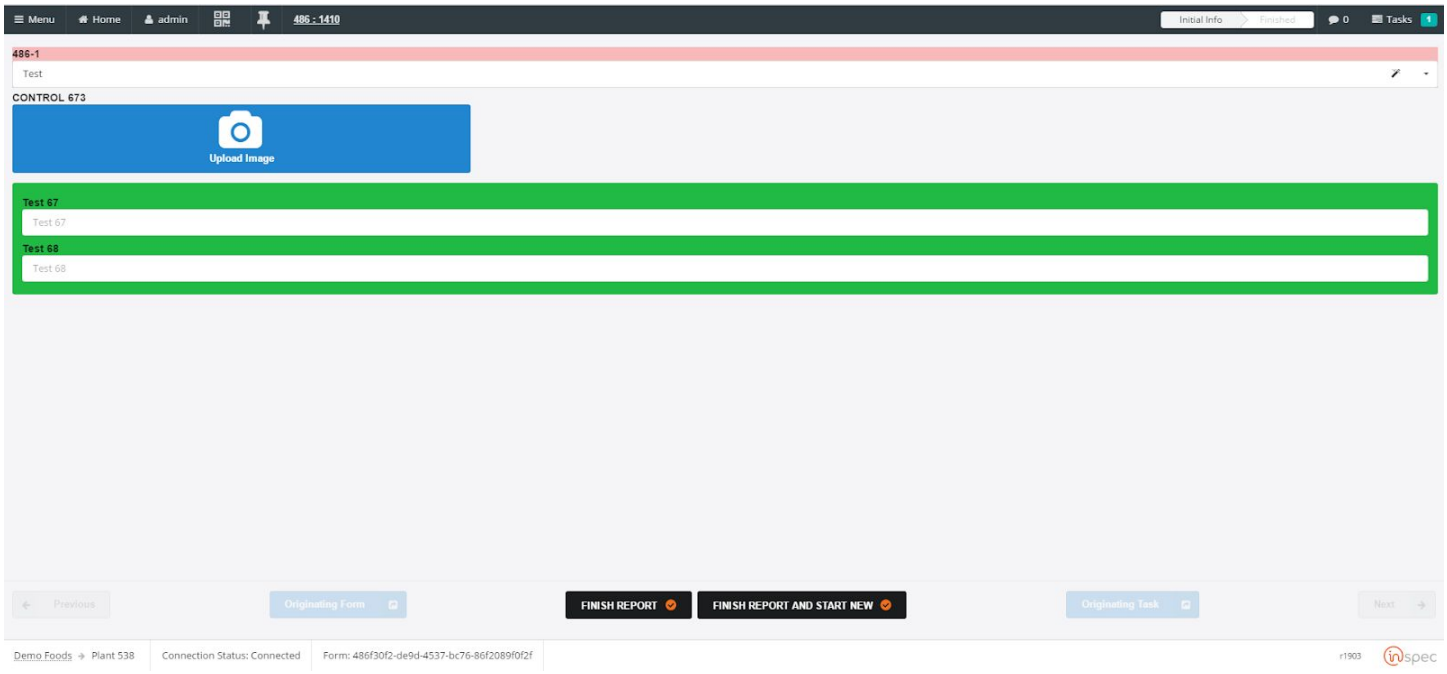




Originating Form

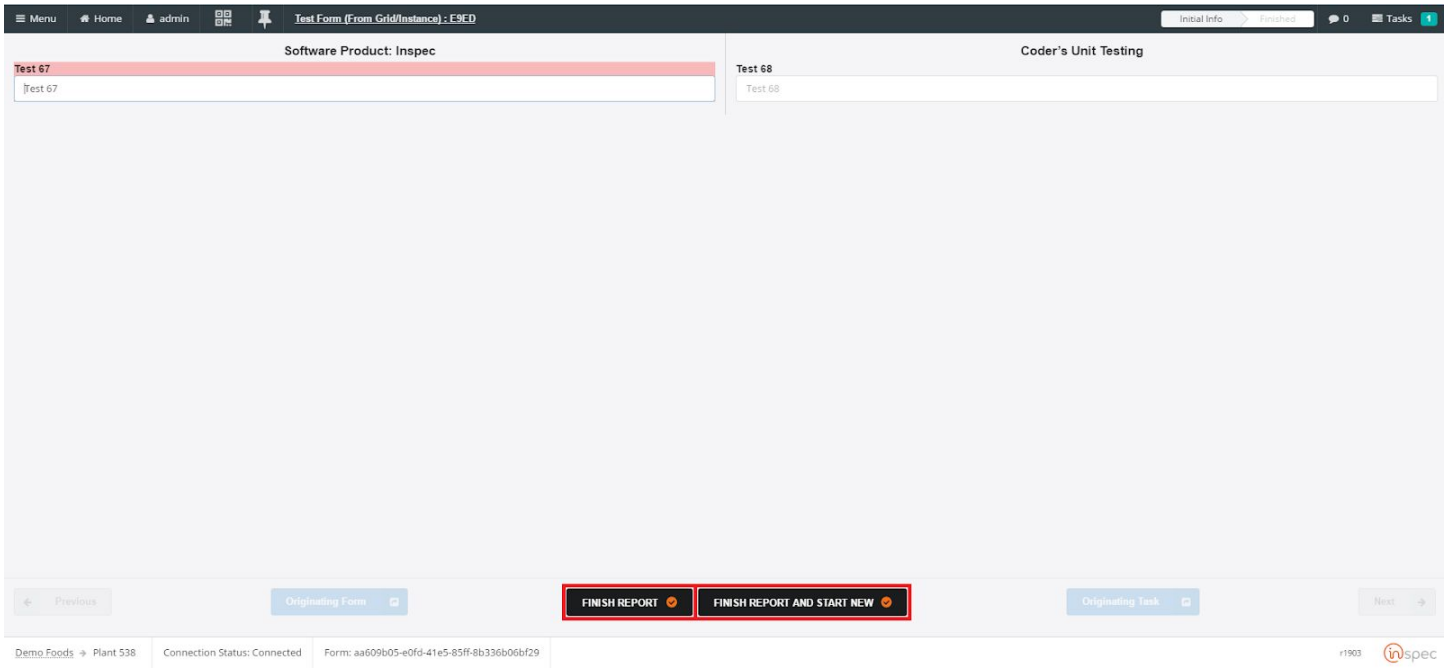
The originating form button will show the user the form that launched the current form. The originating form button will only be available if a form was set to launch the current form and did so.





Finish Report/Finish Report and Start New

The “Finish Report” and “Finish Report and Start New” functions are both designed to finish the users form session. However, “Finish Report and Start New” will bring the user to a new identical, unfinished, form.



Numeric Fields

Text Fields

Drop-Down Fields

Button Bar Fields

Tally Controls

Grouped Forms(ToDo)

Previous / Next Buttons