

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

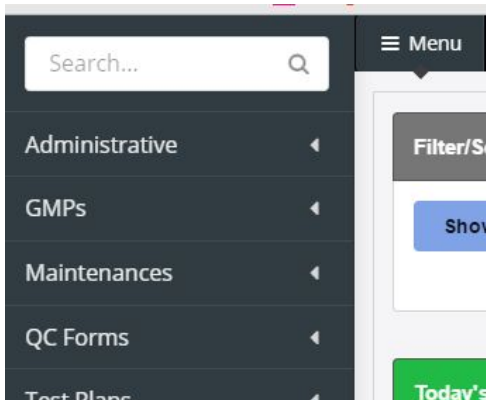
Top Menu

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.

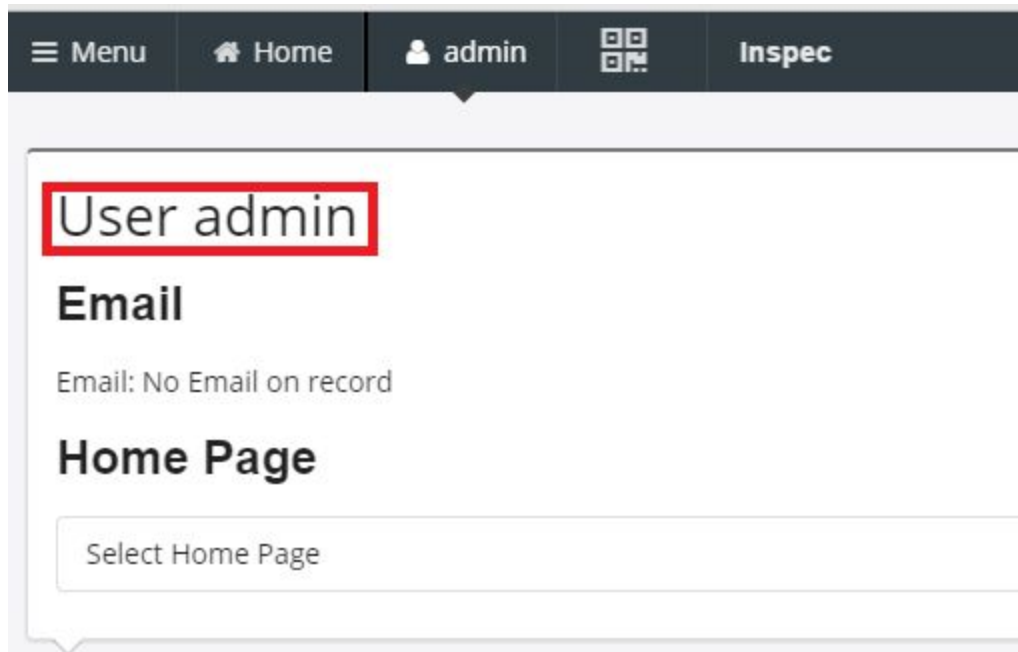
Home Page



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

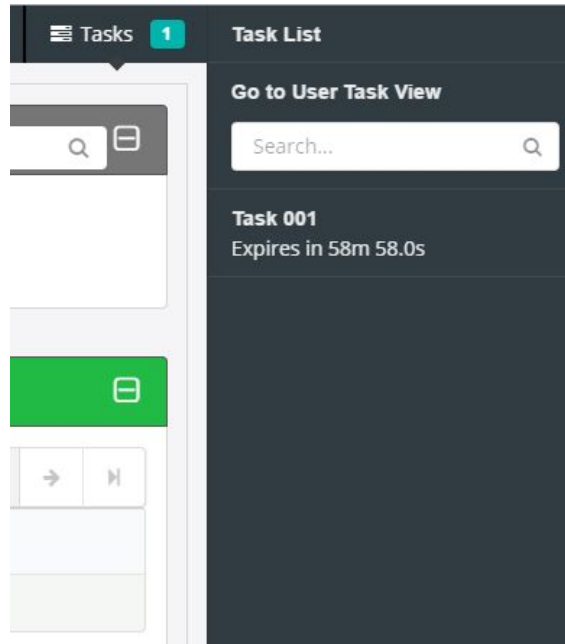


The <QR> tab can be used to travel to the loaded screen on another device, once scanned.

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.



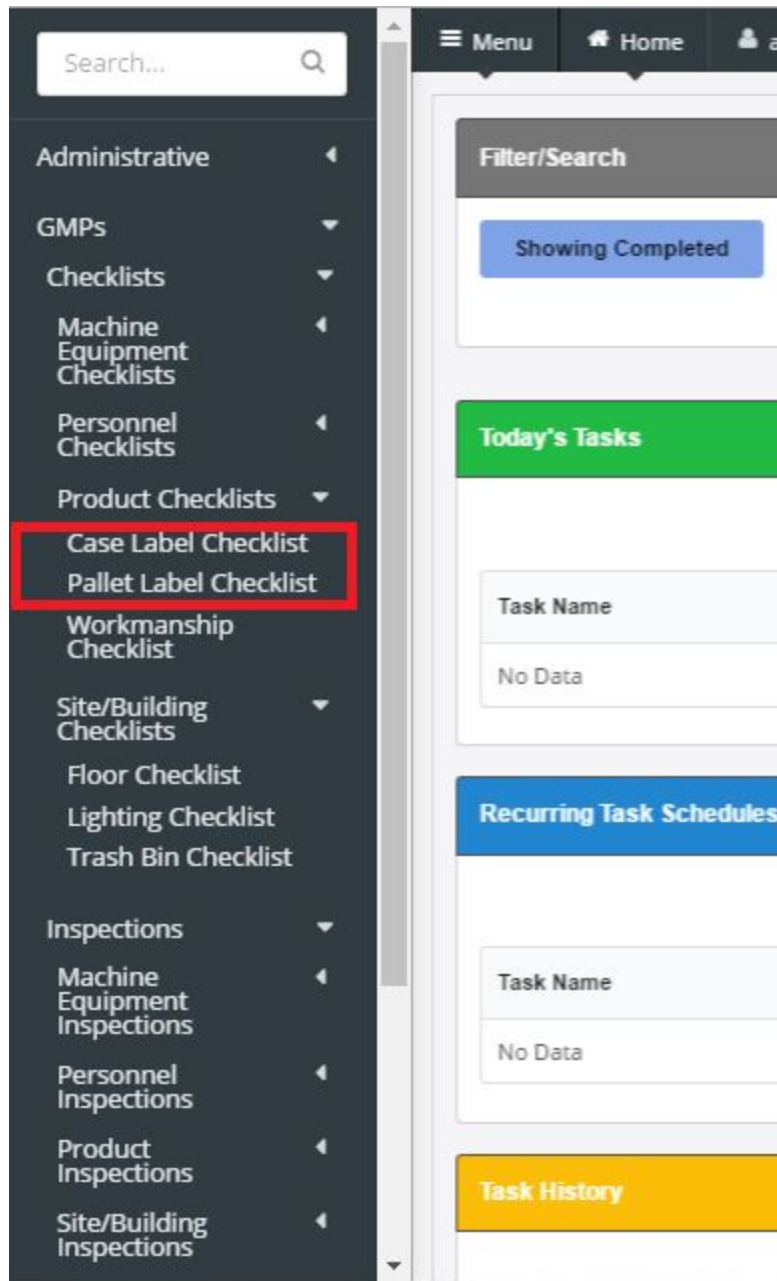
Task initiated forms

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).

Task Name	Form Name	Status	Type	Start Time	Expiration Time	Assigned To
Test Task 01	Test Form (From Grid/Instance)	active	Single	02:19 pm	03:19 pm	admin

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.

The screenshot shows a data grid titled 'Cod - Tender Information: Overview'. The grid has columns for Ref #, Date, Lot Code, Tender, Created By, and Status. There are three rows of data. The grid also includes a search bar, a 'New Cod - Tender Information' button, an 'Export' button, and a 'Stats, Form Context' button. The status of the rows is 'Finished'.

Ref #	Date	Lot Code	Tender	Created By	Status
6083	2016-12-13 10:32:44	COD7777R	YPRES IV	mjc	Finished
1827	2016-12-13 09:37:17	COD1000L	GALAXY VII	mjc	Finished
1122	2016-12-13 09:35:58	COD1227A	TRIUMPH XI	mjc	Finished

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).

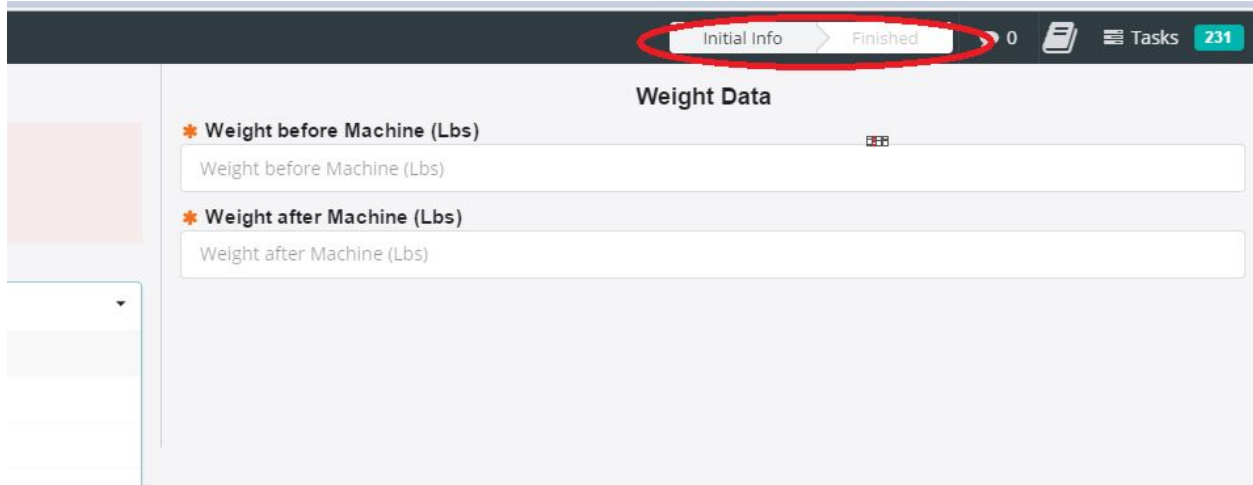
To select an existing form, just click on the desired form in the Ref# (Reference) column. If a form is in the Finished state (all mandatory fields filled in, FINISH REPORT button pressed), you will be able to view the data, but not make any changes. If it is not in the Finished state, you will be able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

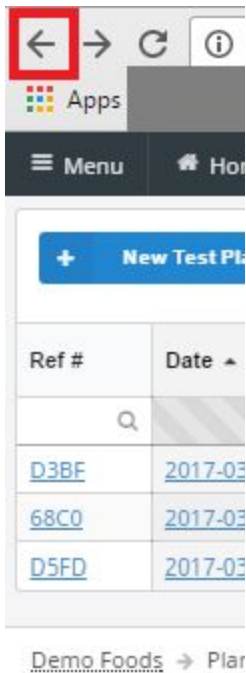
Fill out the form. If a field has a star by it, it signifies a mandatory field. All mandatory fields must be filled out before a form can be completed.

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.

Ref #	Date	Last Modified	Created By	Reason For Override	Status
No data found					

The reference number.

Ref #	Date	Last Modified	Created By	Reason For Override	Status
936C	2017-04-13 19:47:20	Example 001	admin	admin	Finished, Approval: ✓ ✗

The forms completion/modification date.

Ref #	Date	test 67	Last Modified	Created By	Reason For Override	Status
936C	2017-04-13 19:47:20	Example 001	admin	admin	admin	Finished, Approval: ✔ ✘

Demo Foods → Plant 538 Connection Status: Connected Form: b29d02a7-8ea3-4e11-8149-b3f38adff94f r1874 inspec

The form's control name.

Ref #	Date	test 67	Last Modified	Created By	Reason For Override	Status
936C	2017-04-13 19:47:20	Example 001	admin	admin	admin	Finished, Approval: ✔ ✘

Demo Foods → Plant 538 Connection Status: Connected Form: b29d02a7-8ea3-4e11-8149-b3f38adff94f r1874 inspec

Form's last modification user.

Ref #	Date	test 67	Last Modified	Created By	Reason For Override	Status
936C	2017-04-13 19:47:20	Example 001	admin	admin	admin	Finished, Approval: ✔ ✘

Demo Foods → Plant 538 Connection Status: Connected Form: b29d02a7-8ea3-4e11-8149-b3f38adff94f r1874 inspec

The form's creator.

Ref #	Date	test 67	Last Modified	Created By	Reason For Override	Status
936C	2017-04-13 19:47:20	Example 001	admin	admin	admin	Finished, Approval: ✔ ✘

Demo Foods → Plant 538 Connection Status: Connected Form: b29d02a7-8ea3-4e11-8149-b3f38adff94f r1874 inspec

The reason for forms override.

Ref #	Date	test 67	Last Modified	Created By	Reason For Override	Status
936C	2017-04-13 19:47:20	Example 001	admin	admin	admin	Finished, Approval: ✔ ✘

The status of the form.

Ref #	Date	test 67	Last Modified	Created By	Reason For Override	Status
936C	2017-04-13 19:47:20	Example 001	admin	admin	admin	Finished, Approval: ✔ ✘

The function to delete the form.

Ref #	Date	test 67	Last Modified	Created By	Reason For Override	Status
936C	2017-04-13 19:47:20	Example 001	admin	admin	admin	Finished, Approval: ✔ ✘

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)

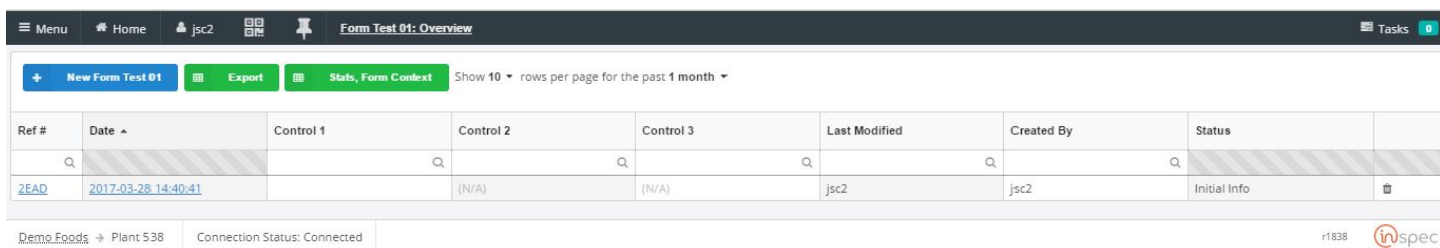


The thumb tack acts as a constant settings function. When performed this function will enable the user to save form data settings to be used in a new form instance.

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.



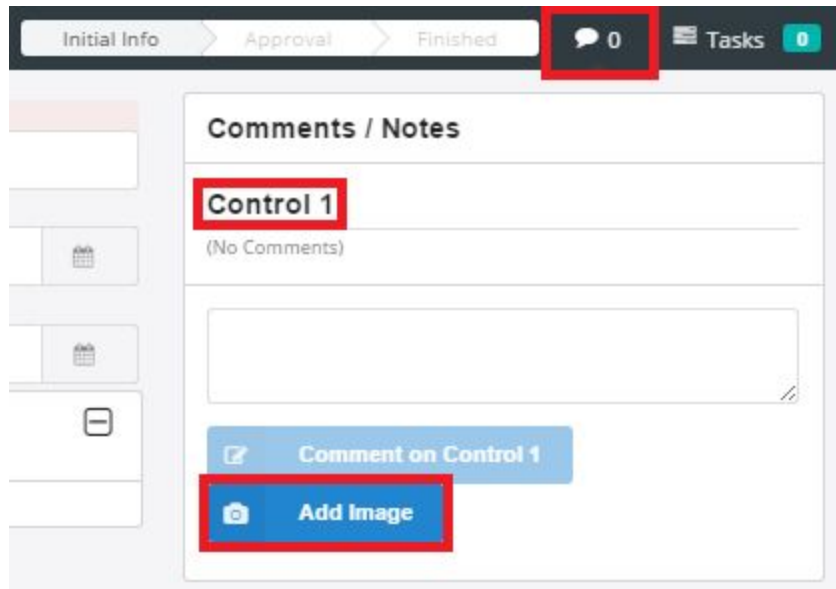
In the figure above the workflow indicator shows that with this specific form the initial information needs to be filled out, the the form must go through approval, and then the form can be completed.

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”.

The screenshot displays a user interface with two columns. The left column is titled "Software Product: Inspec" and contains a text input field labeled "Test 67" with the value "Test 67". The right column is titled "Coder's Unit Testing" and contains a text input field labeled "Test 68" with the value "Test 68". The interface includes a top navigation bar with "Menu", "Home", "admin", and "Test Form (From Grid/Instance) : 5A82". A status bar at the bottom shows "Demo Foods -> Plant 538", "Connection Status: Connected", "Form: aa609b05-e0fd-41e5-85ff-8b336b06bf29", and "r1874 inSpec".

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.

The screenshot displays the Form Designer interface. The top navigation bar includes "Menu", "Home", "admin", and "Forms Designer: Test Form (From Grid/Instance)". A toolbar below the navigation bar contains "New Form", "Open", "Save", "2", "More", "Editing Layout", "Edit Properties", "Edit Workflow", "Edit Grid Layout", "Edit Documentation", "View History", and "Manual Edit". The main area shows two columns. The left column is titled "Software Product: Inspec" and contains a text input field labeled "Test 67" with the value "Test 67" and "Add New" and "Copy" buttons. The right column is titled "Coder's Unit Testing" and contains a text input field labeled "Test 68" with the value "Test 68" and "Add New" and "Copy" buttons. The status bar at the bottom is identical to the User View screenshot.

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Workflow

The screenshot shows a workflow interface with two main panels. The left panel is titled "Software Product: Inspec" and contains "Test 67: (None)". The right panel is titled "Coder's Unit Testing" and contains "Test 68: (None)". At the top right, a navigation bar includes a "Initial Info" button, which is highlighted with a red box. Below the panels, there is a "Reopen Form" button. At the bottom, a navigation bar contains buttons for "Previous", "Originating Form", "Initial Info", "Initial Info and Start New", "Originating Task", and "Next". The footer shows "Demo Foods -> Plant 538", "Connection Status: Connected", "Form: aa609b05-e0fd-41e5-85ff-8b336b06bf29", "r1903", and the "inspec" logo.

Action Buttons

Previous/Next

The screenshot shows the same workflow interface as above, but with the "Previous" and "Next" buttons in the bottom navigation bar highlighted with red boxes. The "Initial Info" button is no longer highlighted. The "Originating Task" button is now disabled. The "FINISH REPORT" and "FINISH REPORT AND START NEW" buttons are now visible and active. The footer information remains the same.

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.

Test 67: (None)

Test 68: (None)

Originating Task

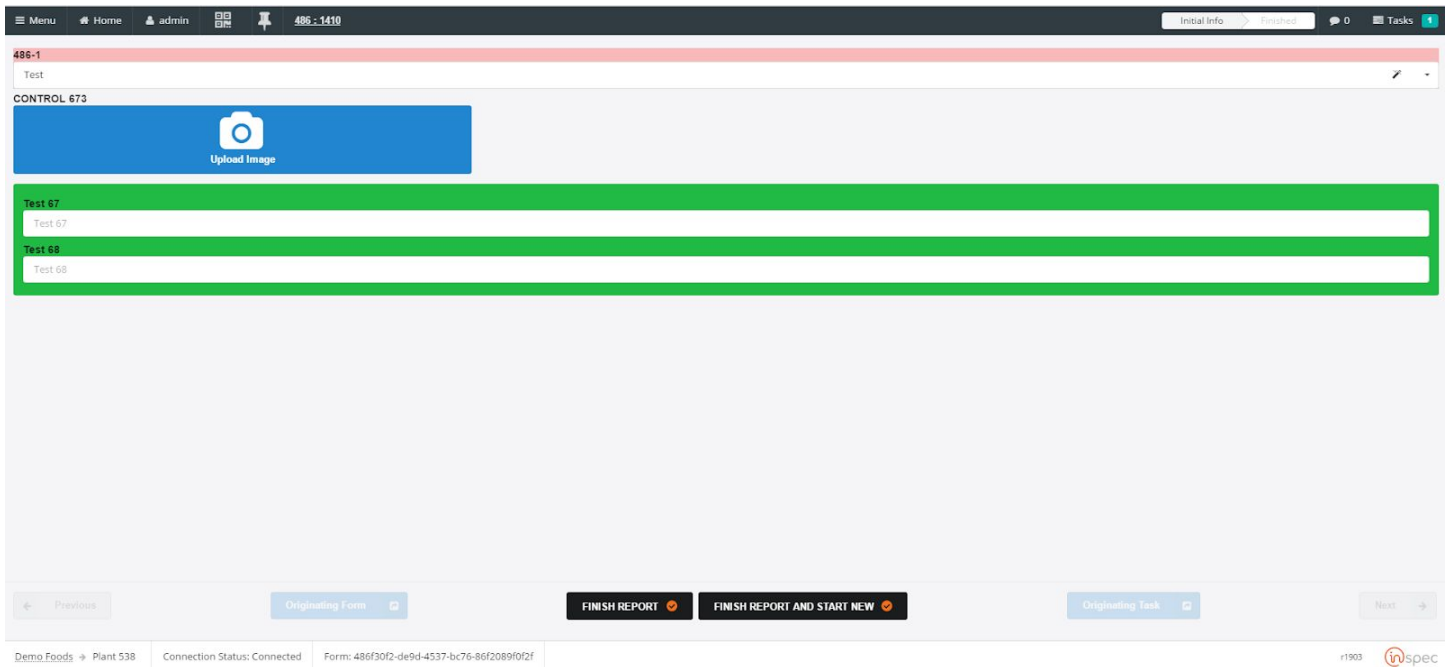
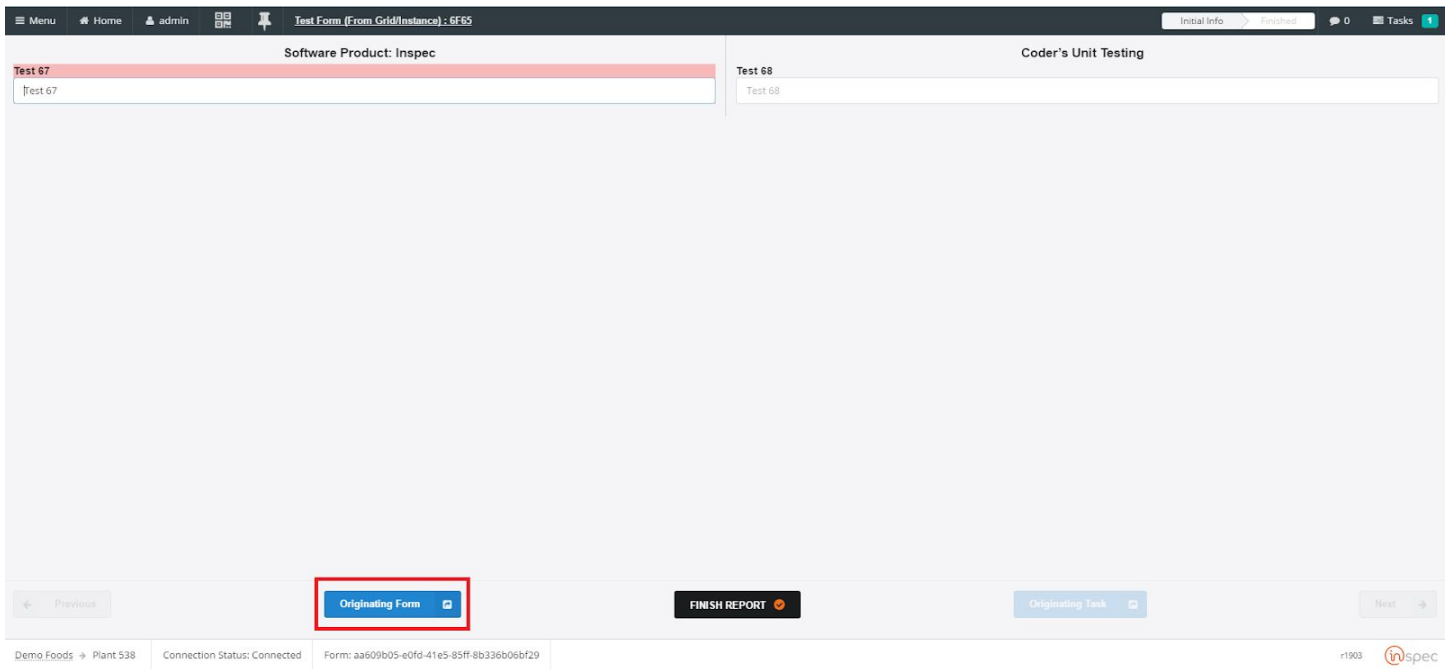
Demo Foods -> Plant 538 | Connection Status: Connected | Form: aa609b05-e0fd-41e5-85ff-8b336b06b29 | r1903 inspec

Task Name	Status	Expiration Time	Assigned To	
Test Form (From Grid/Instance)	active	2017-05-03 23:47:00	admin	Task in progress

Demo Foods -> Plant 538 | Connection Status: Connected | r1903 inspec

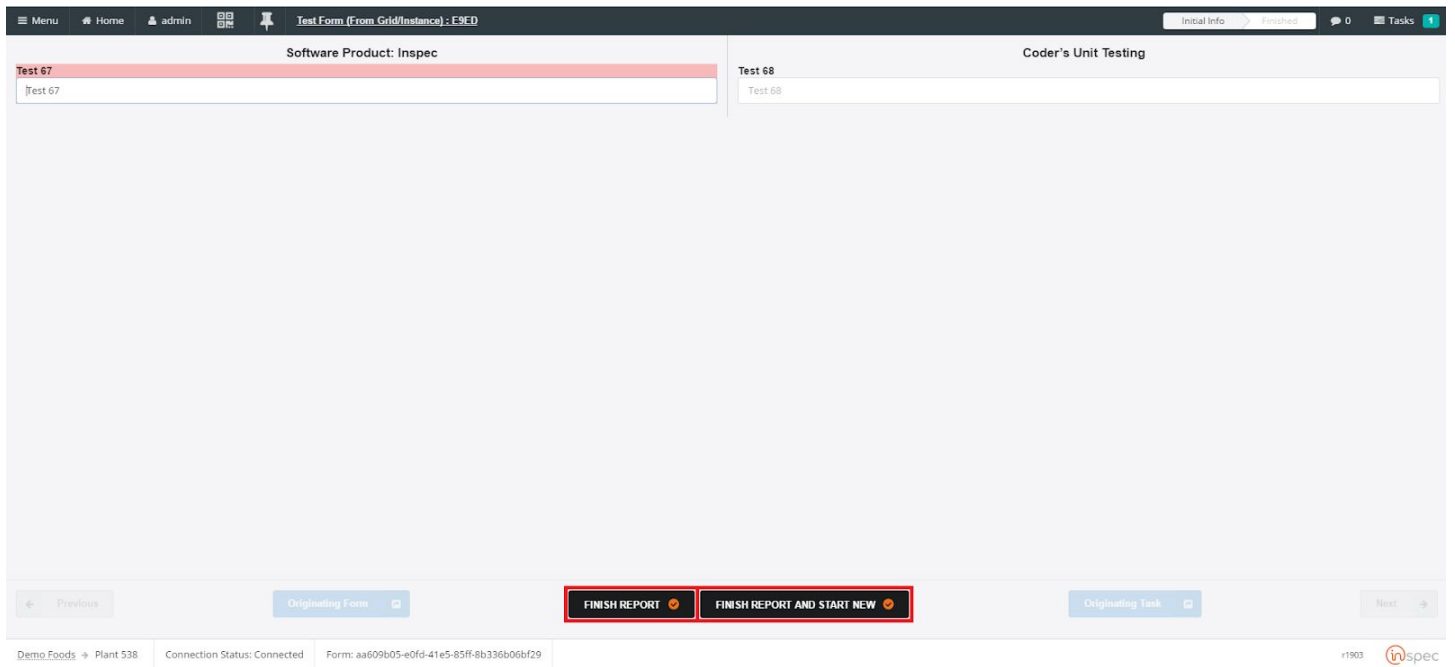
Originating Form

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

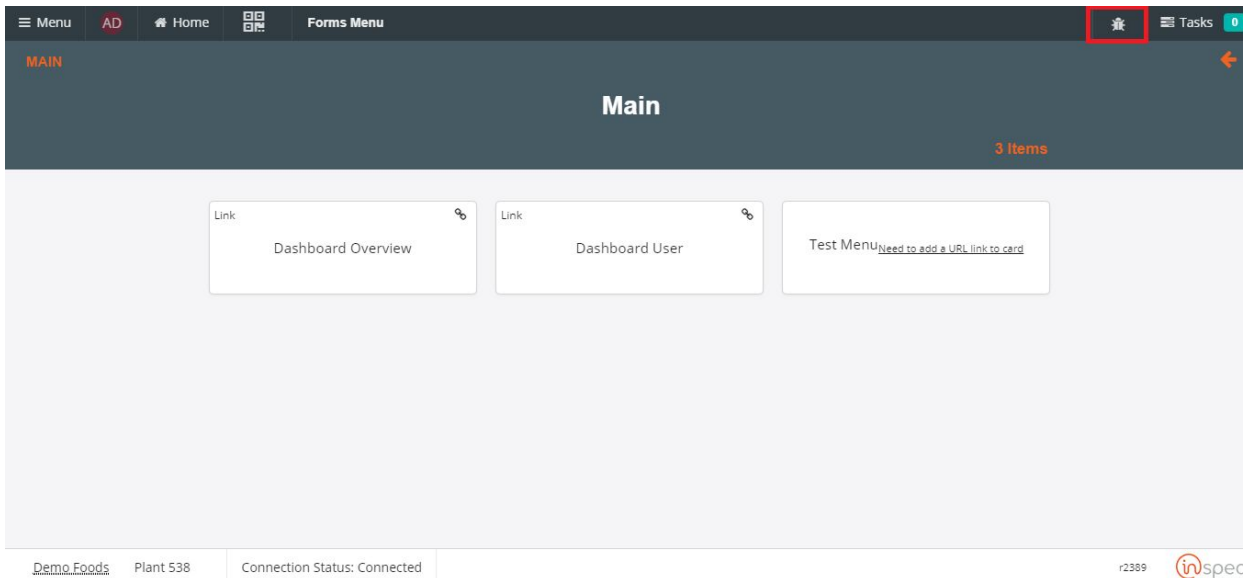
Grouped Forms(ToDo)

Previous / Next Buttons

Bug Reporting / Review

The Bug Reporting function is used to quickly and efficiently report bugs as they are discovered. Filling out the bug report creates a ticket for that issue in the system. This function can be accessed while in any Inspec page from the top menu bar.

To access the bug reporting tool select the bug icon in the top right corner of that page, on the menu bar.

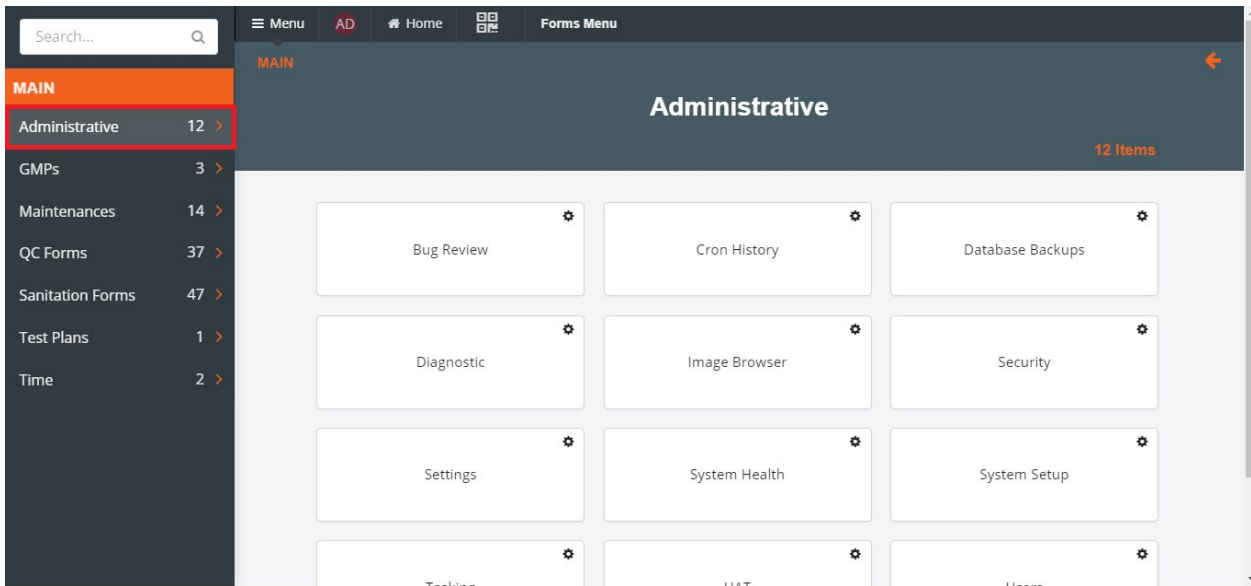


Selecting the Bug icon in the menu bar will populate this report ticket.

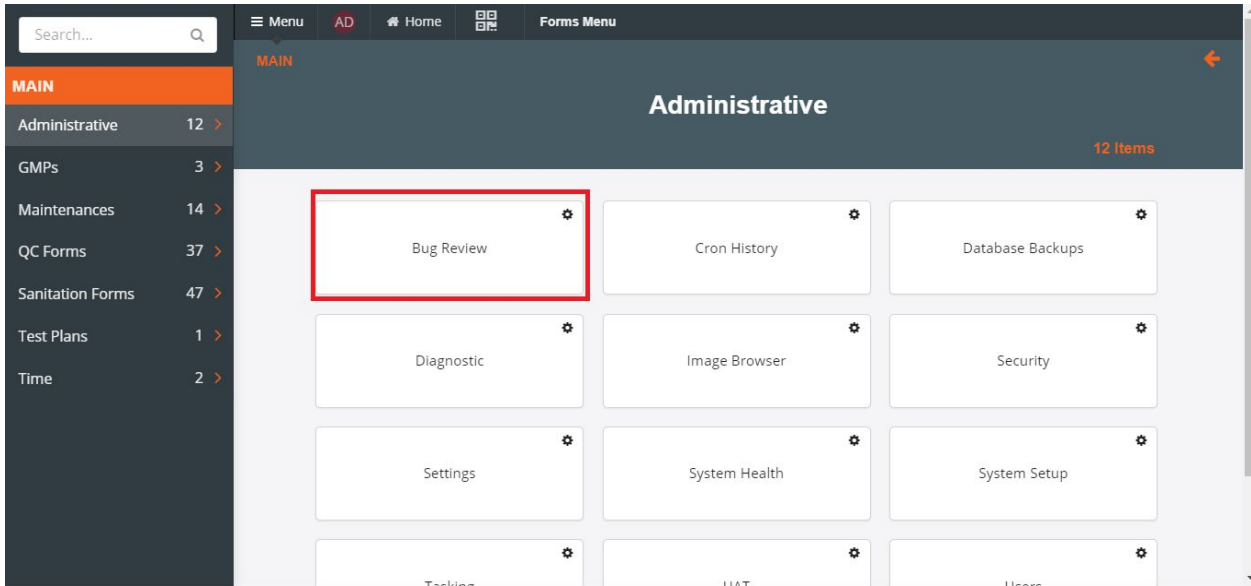
A screenshot of a 'Report a Problem' form. The form has a title bar with 'Report a Problem' and a close button. It contains three main sections: 1. 'Where is the problem?' with a dropdown menu. 2. 'What happened?' with a large text area containing the placeholder text 'Briefly explain the problem and give the steps to reproduce it. 25 characters minimum'. 3. 'Upload Screenshot' with a camera icon button. At the bottom right, there are two buttons: 'Send' (blue) and 'Cancel' (grey).

Indicated where the issue is, not necessarily the page you are in at the time of loading the ticket. Next give an in depth description of the issue you are reporting. As well as how it can be replicated. You may upload screenshots of the issue to assist in fixing the bug. Once you are finished filling out the ticket with any information related to the issue select <Send> to report the issue and log it into the system.

To review reported bugs open the administration section of the menu slide out.



Next select the <Bug Review> menu.



From here bug-review (admins) can review, edit, confirm, or delete the ticket. Confirming the ticket will update Coolearth as to the status of the ticket being a bug that needs to be reported.

