



# Inspec User Guide

ver. 2018-May

## Examples, Scenarios and Exercises

### Forms

#### Simple Form

Example:



ACME Electronics Company

Quality Assurance Form – Solder Joints Defects

Employee Name \_\_\_\_\_

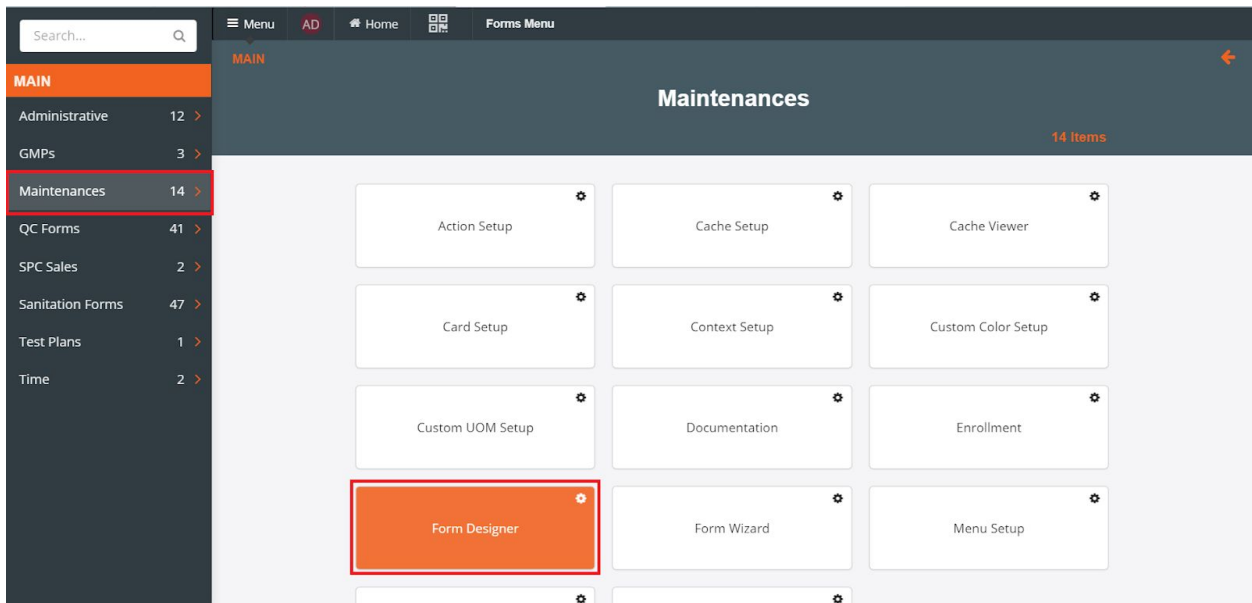
Employee # \_\_\_\_\_

Date of Inspection \_\_\_\_\_

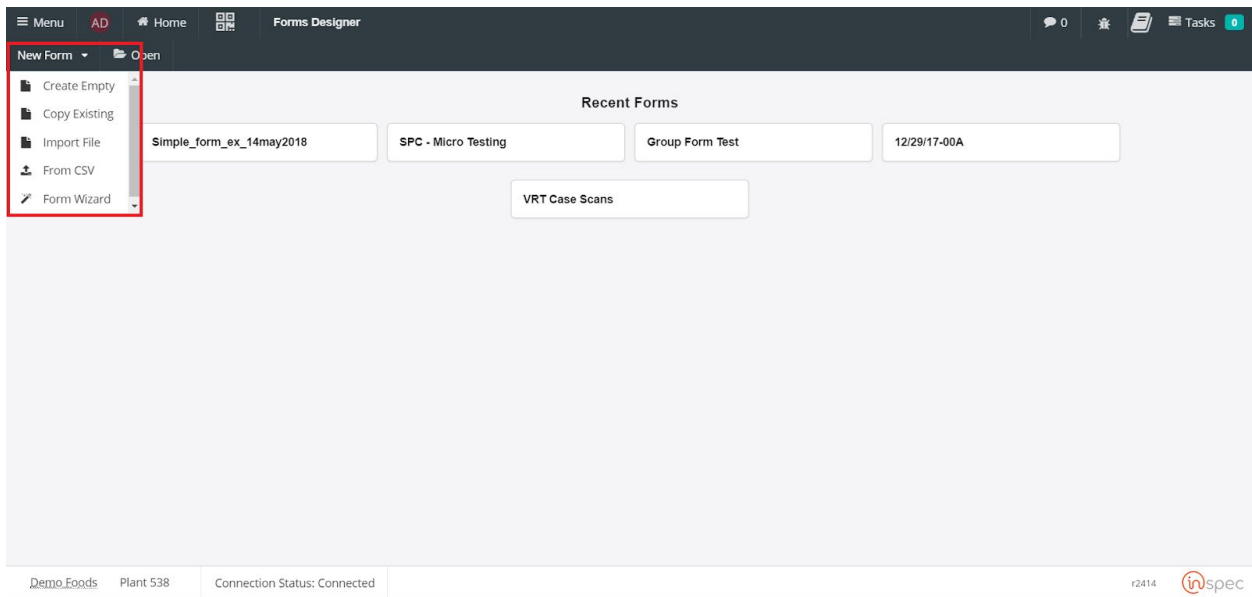
Work Station \_\_\_\_\_

	PART NUMBER
SAMPLES OF 1,000 SOLDER JOINTS	
COLD SOLDER	////
NO SOLDER IN HOLE	///
GRAINY SOLDER	///
HOLE NOT PLATED THROUGH	///
MASK NOT PROPERLY INSTALLED	///
PAD LIFTED	/

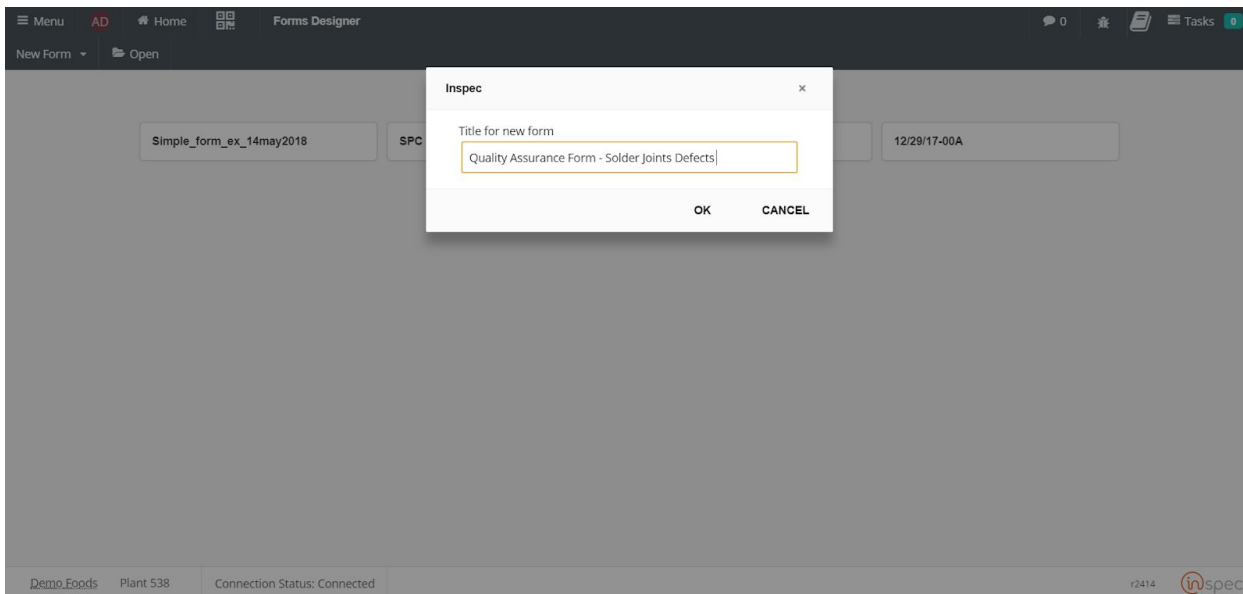
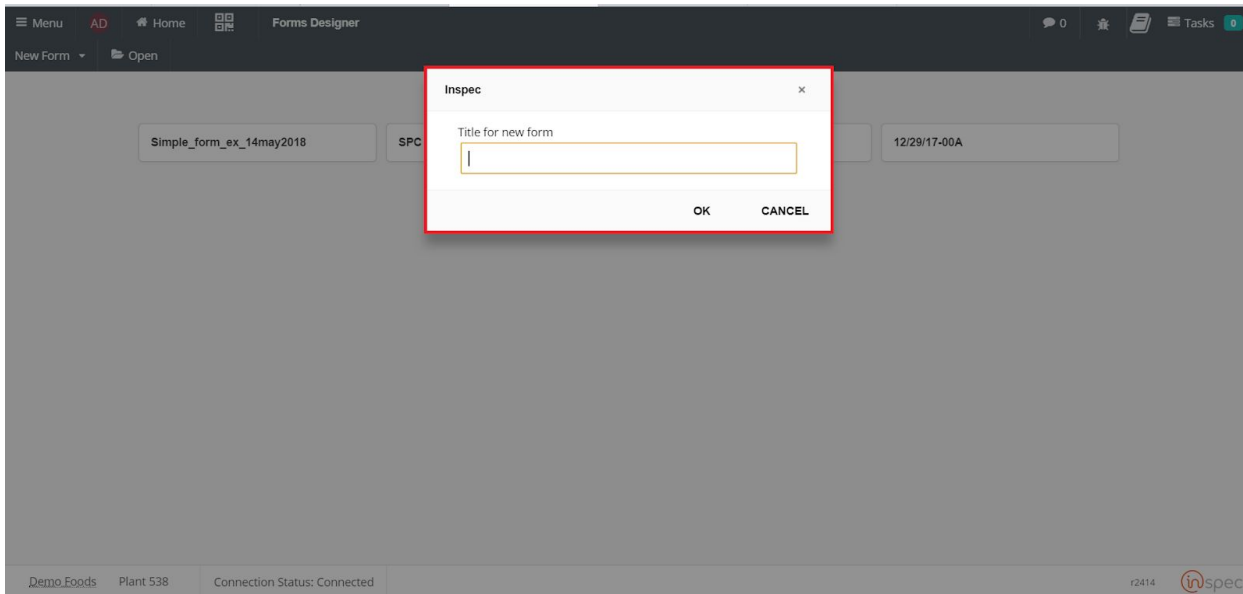
To create a copy of this physical form in Inspec open forms designer from the maintenances slide-out and selecting <Forms Designer>.



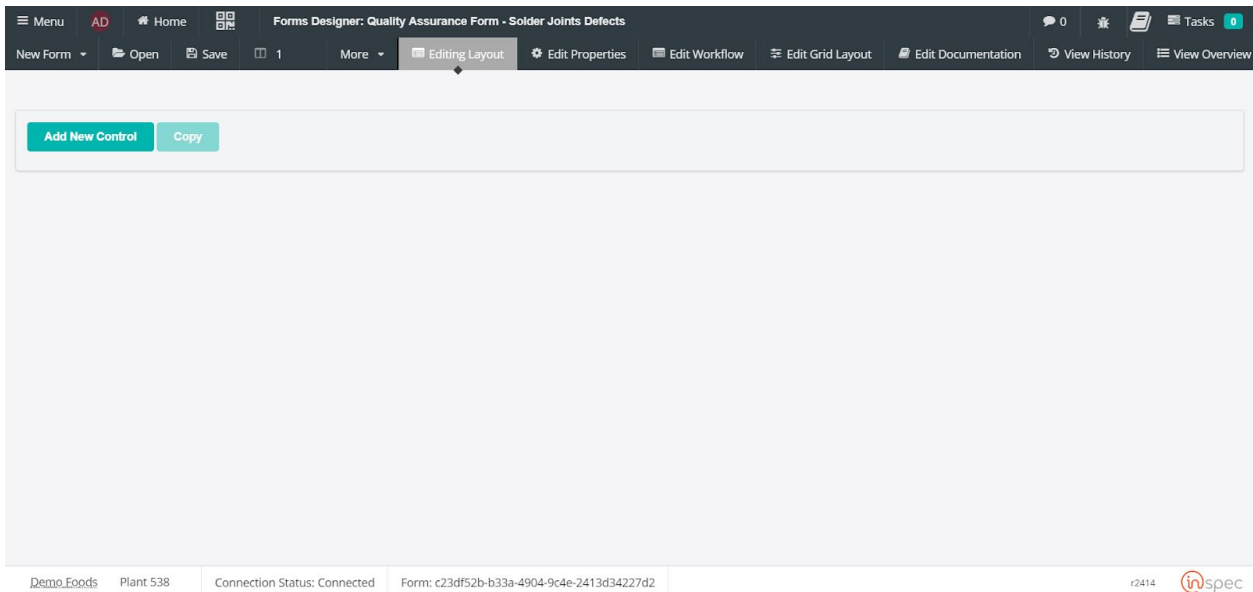
Once forms designer is open, toggle the <New Form> drop-down on the menu bar and select <Create Empty>.



Give your form the desired name that represents its function.



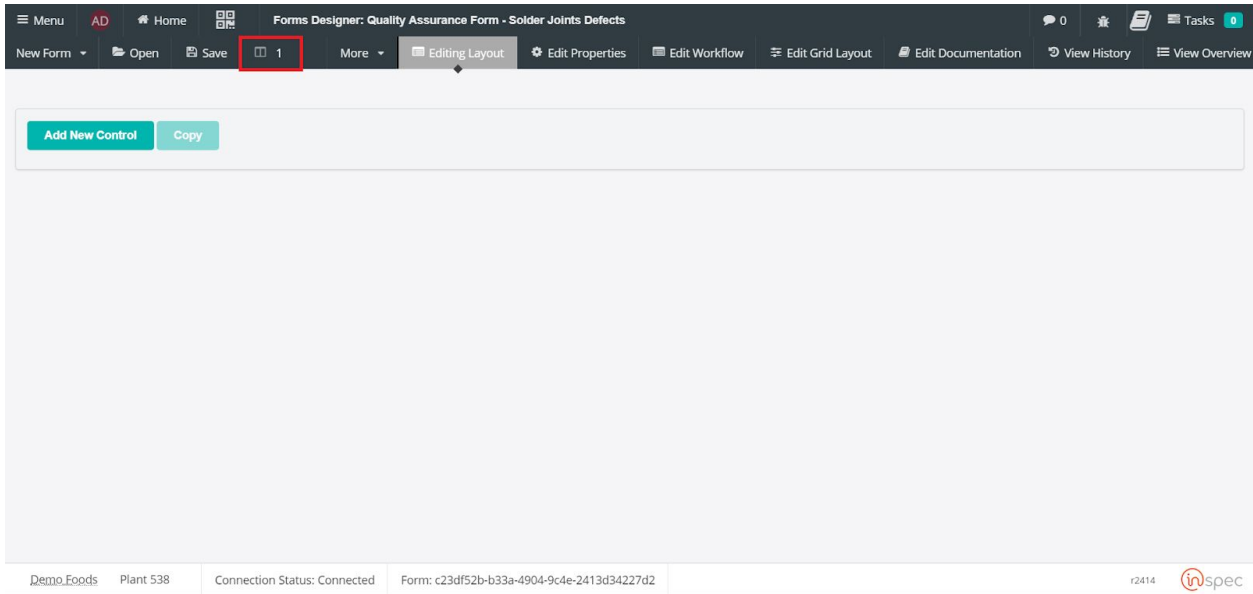
Upon naming the form the designer page will be brought up and controls for the creation of the form will be present across the menu bar and in the main field.



Select the desired controls for the form being built. These controls functions can be read about in the Forms Designer section of this document.

For this form two columns will be required. One for context data, this would include items like employee name, number, date of inspection, and work station. However, we will only create a control for the workstation because date/time and employee data will automatically be represented by Inspec. The second column will represent specific sample data, in this example solder defects.

To create these columns specify the number of columns desired next to the columns icon in the menu bar.



The screenshot shows the 'Forms Designer: Quality Assurance Form - Solder Joints Defects' interface. The top menu bar includes 'Menu', 'AD', 'Home', and a grid icon. Below the menu, there are tabs for 'New Form', 'Open', 'Save', '2', and 'More'. The 'Editing Layout' tab is active. The main workspace is divided into two columns, 'Column 1' and 'Column 2'. Each column has a 'No Controls' button and 'Add New' and 'Copy' buttons below it. The bottom status bar shows 'Demo Foods', 'Plant 538', 'Connection Status: Connected', 'Form: c23df52b-b33a-4904-9c4e-2413d34227d2', 'r2414', and the 'inspec' logo.

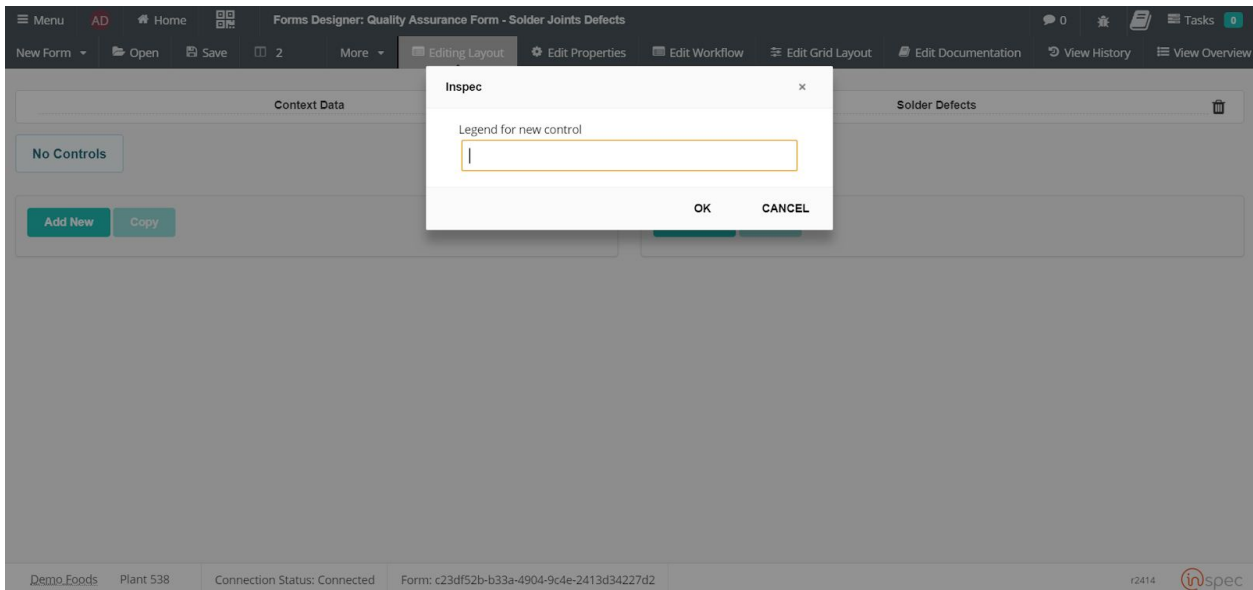
Now that the required columns are present, name them to specify their function or representation. Columns can be used to organize different types of information or to draw a users attention in a path to control workflow. Naming columns is simple, just highlight the “Column #” text and type over it with the desired text.

This screenshot is identical to the previous one, but with red rectangular boxes highlighting the text 'Column 1' and 'Column 2' in the column headers, demonstrating the step of naming the columns.

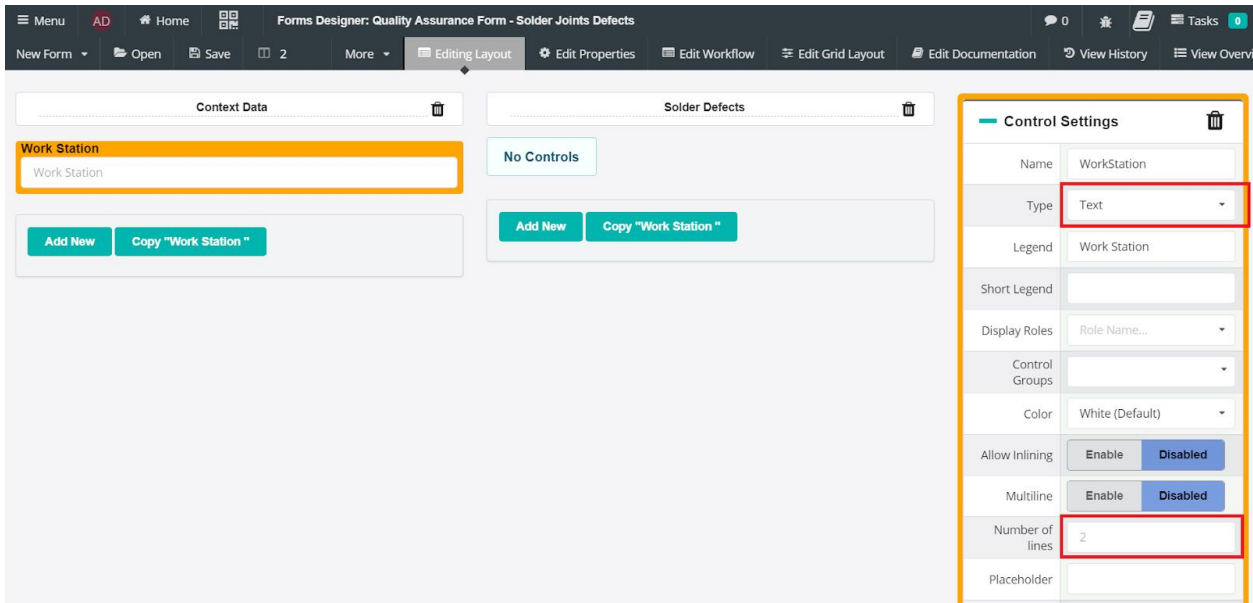
The screenshot shows the 'Forms Designer: Quality Assurance Form - Solder Joints Defects' interface. The top menu bar includes 'Menu', 'AD', 'Home', and 'Tasks'. Below the menu, there are tabs for 'New Form', 'Open', 'Save', '2', 'More', 'Editing Layout', 'Edit Properties', 'Edit Workflow', 'Edit Grid Layout', 'Edit Documentation', 'View History', and 'View Overview'. The main workspace is divided into two columns: 'Context Data' and 'Solder Defects'. Each column has a 'No Controls' button and an 'Add New' button. The 'Add New' buttons are highlighted with red boxes. At the bottom, there is a status bar with 'Demo Foods', 'Plant 538', 'Connection Status: Connected', 'Form: c23df52b-b33a-4904-9c4e-2413d34227d2', and 'r2414'.

Now that the columns have been named controls can be added. To begin adding controls select the <Add New> button in either column. For this form we will add a text control under the “Context Data” for the work station information. With any control once <Add New> is selected a legend pop-up will populate, fill in the desired control name that will inform a user of what information is required for that field.

This screenshot is identical to the one above, showing the 'Forms Designer' interface with the 'Context Data' and 'Solder Defects' columns. The 'Add New' buttons are highlighted with red boxes. The status bar at the bottom now includes a date and time stamp: 'Tuesday, May 15, 2018'.

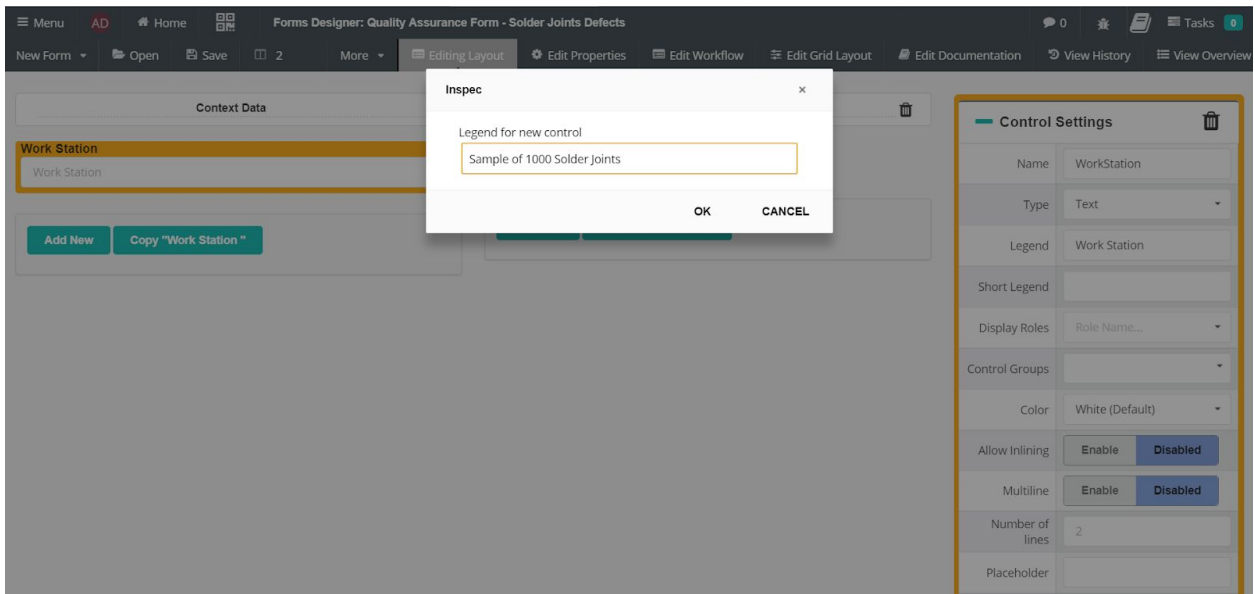


Once the control has been named and saved, a variety of settings for that control can be set. To cover the basics in this section, for the control the type of control can be set with the “ Type” drop-down and the number of lines for this specific control can be set.

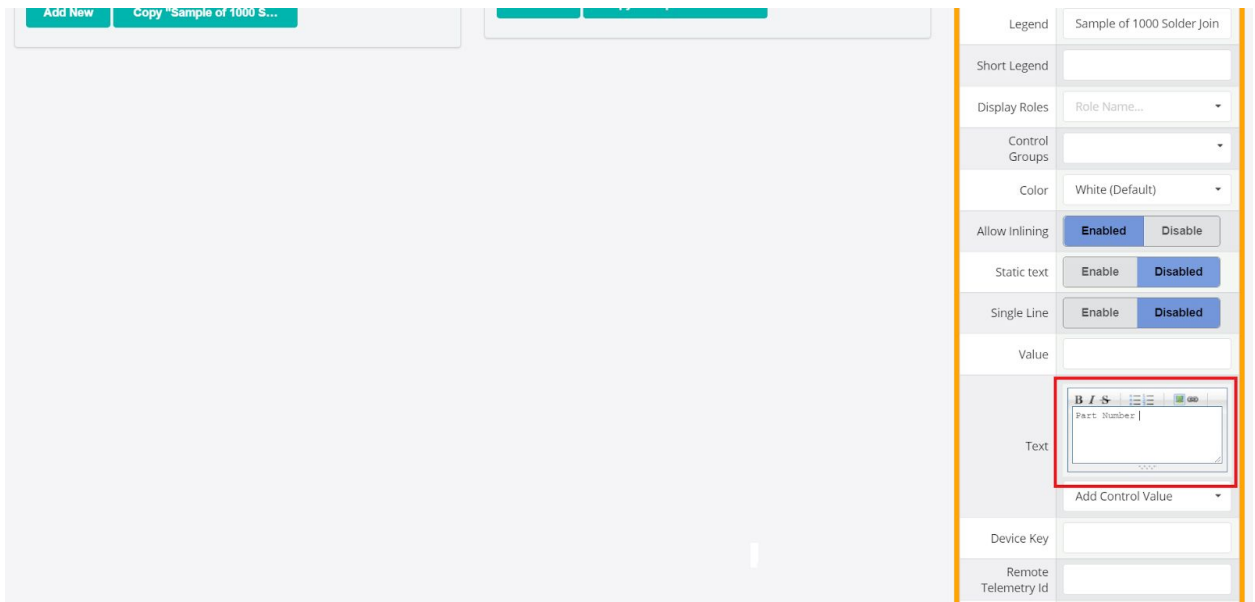


Moving on to the Solder Defects/ Sample Data column, a label control will be used to mimic the original forms “Sample of 1000 Solder Joints” and “Part Number” labels. Select <label> in the control type drop-down.





To create text in the subheading section of the label control enter the desired subheading in the text field on the control settings.



The next control on this form will be a numeric to represent the part number of the defected cold solder joint, represented on the original form. Like the previous controls, select <Add New> and define the control as a <Numeric> in the type drop-down menu.

With numeric controls you can define the precision of the decimal place to allow a certain number of characters to be input. These controls are set to a precision of 2 by default. For this form the precision will be hanged to 6, as 6 characters in the maximum allowed by this control.



The screenshot shows the 'Forms Designer: Quality Assurance Form - Solder Joints Defects' interface. A red-bordered 'Inspect' dialog box is open, displaying the legend for a new control: 'No Solder in Hole'. The dialog has 'OK' and 'CANCEL' buttons. In the background, the 'Control Settings' panel is visible, showing properties for a control named 'ColdSolder'.

Control Settings	
Name	ColdSolder
Type	Numeric
Legend	Cold Solder
Short Legend	
Display Roles	Role Name...
Control Groups	
Color	White (Default)
Specification/Scores	Enable Disabled
Show Spec Popup	Enable Disabled
Allow Inlining	Enable Disabled
Placeholder	

At this point our next control is a clone of the first only with a different name. With this form the remaining controls will be clones of each other, so the steps will be repeated.

The screenshot shows the 'Forms Designer' interface with the 'Solder Defects' section. It displays a 'Sample of 1000 Solder Joints' with a 'Part Number' field. Below this, there are two 'Cold Solder' controls and one 'No Solder in Hole' control, each with an 'Add New' and 'Copy' button. The 'Control Settings' panel on the right shows properties for a control named 'NoSolderinHole'.

Control Settings	
Name	NoSolderinHole
Type	Numeric
Legend	No Solder in Hole
Short Legend	
Display Roles	Role Name...
Control Groups	
Color	White (Default)
Specification/Scores	Enable Disabled
Show Spec Popup	Enable Disabled
Allow Inlining	Enable Disabled
Placeholder	

Forms Designer: Quality Assurance Form - Solder Joints Defects

Menu AD Home 0 1 2 More Editing Layout Edit Properties Edit Workflow Edit Grid Layout Edit Documentation View History View Overview

Context Data

Work Station  
Work Station

Add New Copy "No Solder in Hole"

**Inspec**

Legend for new control

Grainy Solder

OK CANCEL

No Solder in Hole  
No Solder in Hole

Add New Copy "No Solder in Hole"

**Control Settings**

Name	NoSolderinHole
Type	Numeric
Legend	No Solder in Hole
Short Legend	
Display Roles	Role Name...
Control Groups	
Color	White (Default)
Specification/Scores	Enable Disabled
Show Spec Popup	Enable Disabled
Allow Inlining	Enable Disabled
Placeholder	

Forms Designer: Quality Assurance Form - Solder Joints Defects

Menu AD Home 0 1 2 More Editing Layout Edit Properties Edit Workflow Edit Grid Layout Edit Documentation View History View Overview

Context Data

Work Station  
Work Station

Add New Copy "Grainy Solder"

**Inspec**

Legend for new control

Hole Not Plated Through

OK CANCEL

No Solder in Hole  
No Solder in Hole

Grainy Solder  
Grainy Solder

Add New Copy "Grainy Solder"

**Control Settings**

Name	GrainySolder
Type	Numeric
Legend	Grainy Solder
Short Legend	
Display Roles	Role Name...
Control Groups	
Color	White (Default)
Specification/Scores	Enable Disabled
Show Spec Popup	Enable Disabled
Allow Inlining	Enable Disabled
Placeholder	

Forms Designer: Quality Assurance Form - Solder Joints Defects

Menu AD Home 0 1 2 More Editing Layout Edit Properties Edit Workflow Edit Grid Layout Edit Documentation View History View Overview

Context Data

Work Station  
Work Station

Add New Copy "Hole Not Plated T..."

**Inspec**

Legend for new control

Mask Not Properly Installed

OK CANCEL

No Solder in Hole  
No Solder in Hole

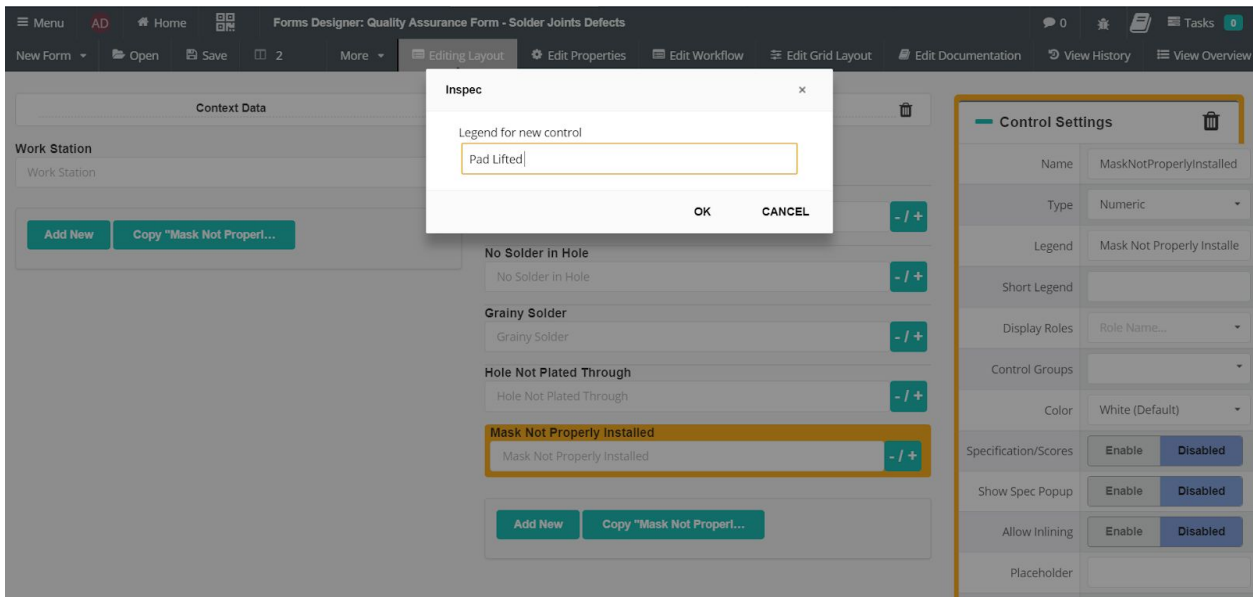
Grainy Solder  
Grainy Solder

Hole Not Plated Through  
Hole Not Plated Through

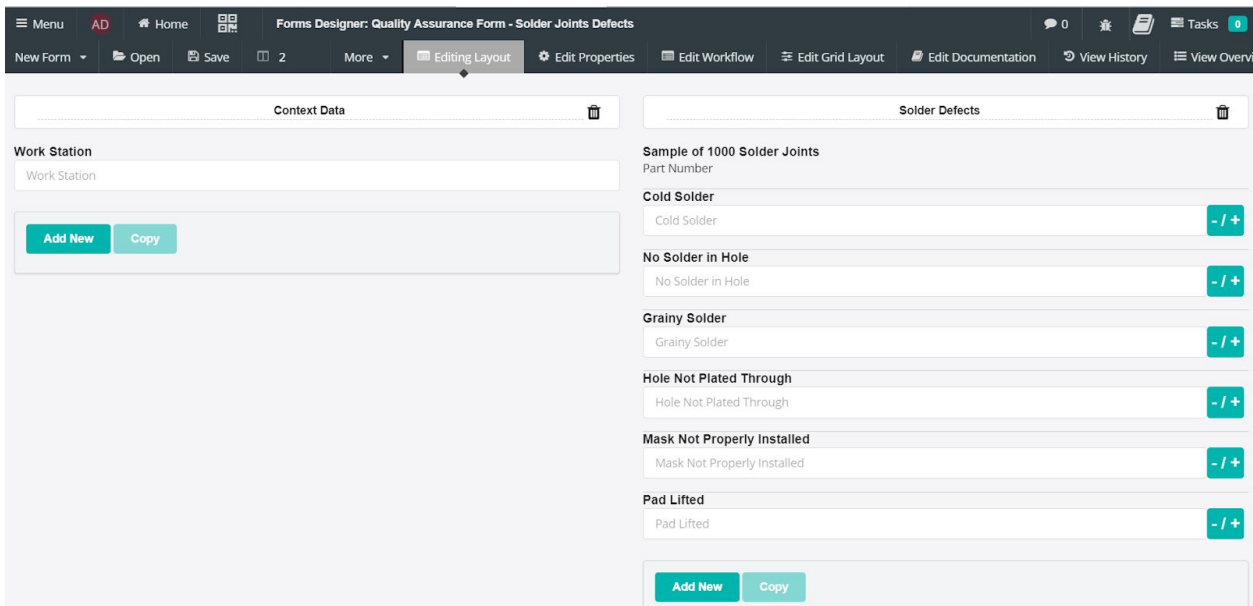
Add New Copy "Hole Not Plated T..."

**Control Settings**

Name	HoleNotPlatedThrough
Type	Numeric
Legend	Hole Not Plated Through
Short Legend	
Display Roles	Role Name...
Control Groups	
Color	White (Default)
Specification/Scores	Enable Disabled
Show Spec Popup	Enable Disabled
Allow Inlining	Enabled Disable
Placeholder	



Now that all of the controls have been created our form for this quality assurance check is complete.



Save all work and leave the forms designer.

Here is the finished user view of our form.

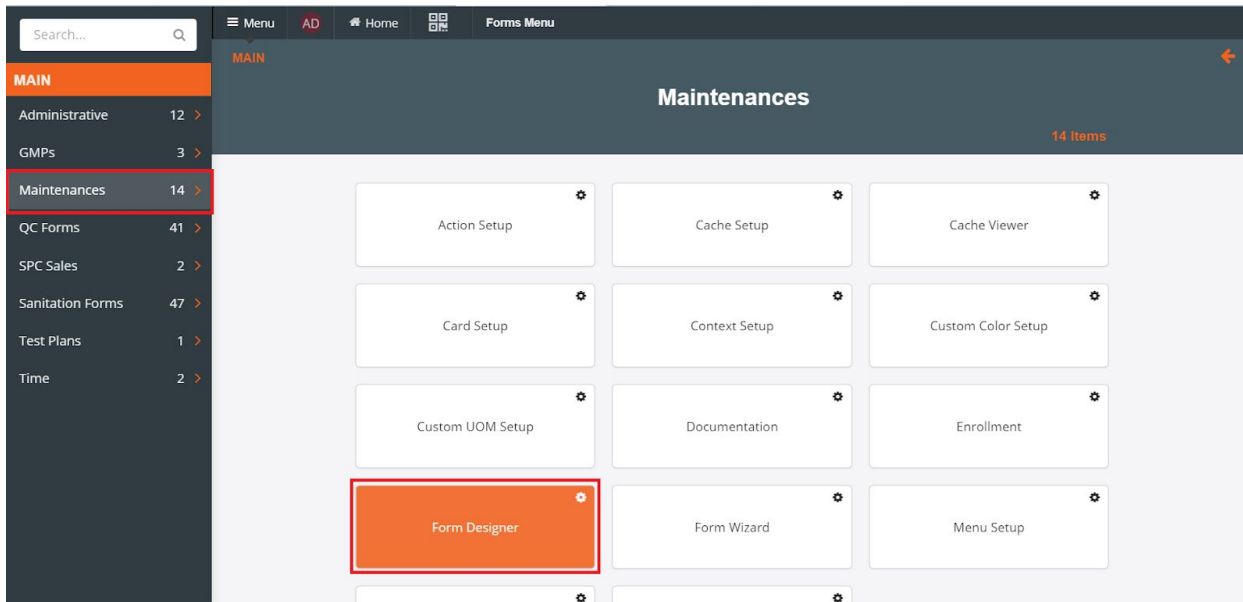
## Group of Forms

In this example we will create a group of forms.

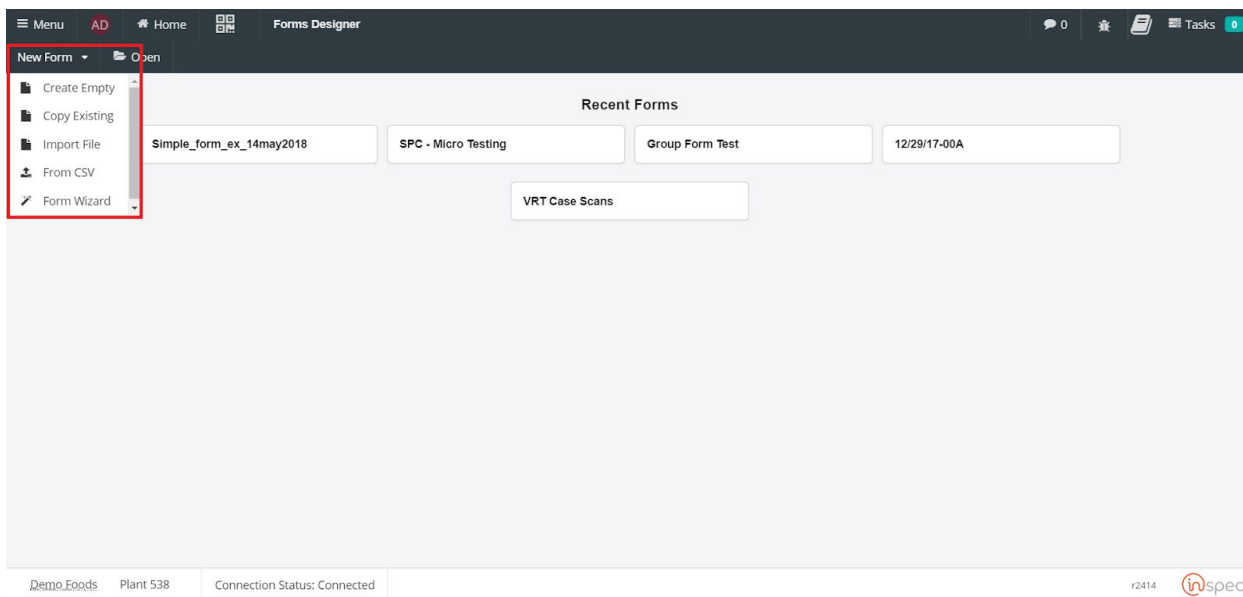
## Form with Actions

This example will cover forms with associated actions.

To create a form in Inspec open forms designer from the maintenances slide-out and selecting <Forms Designer>.

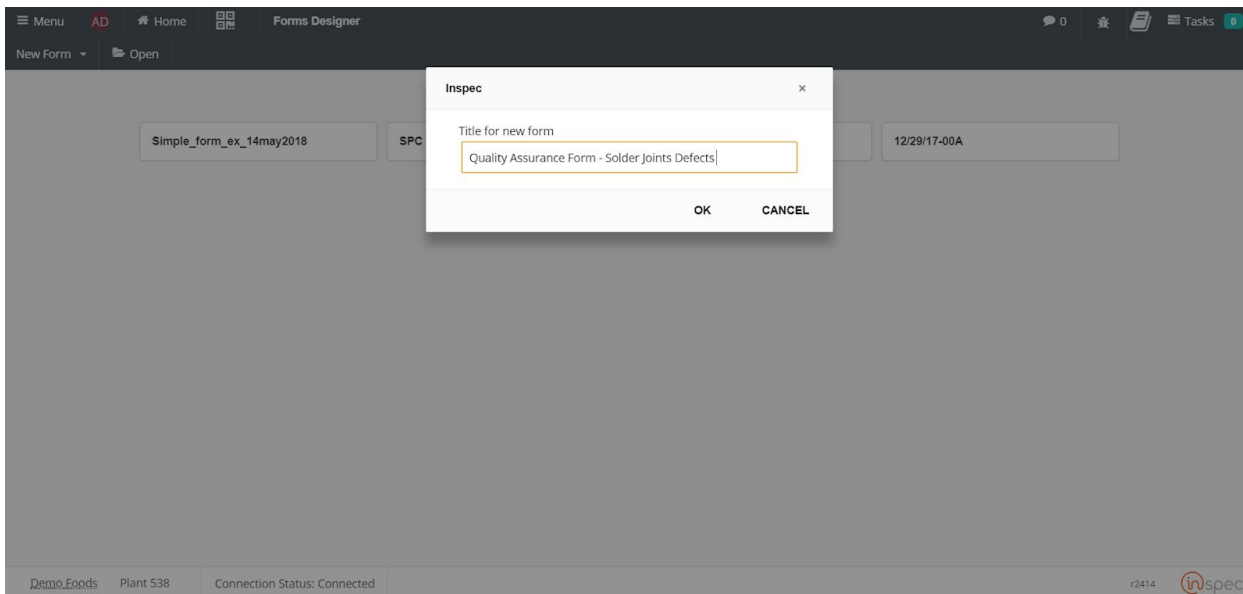
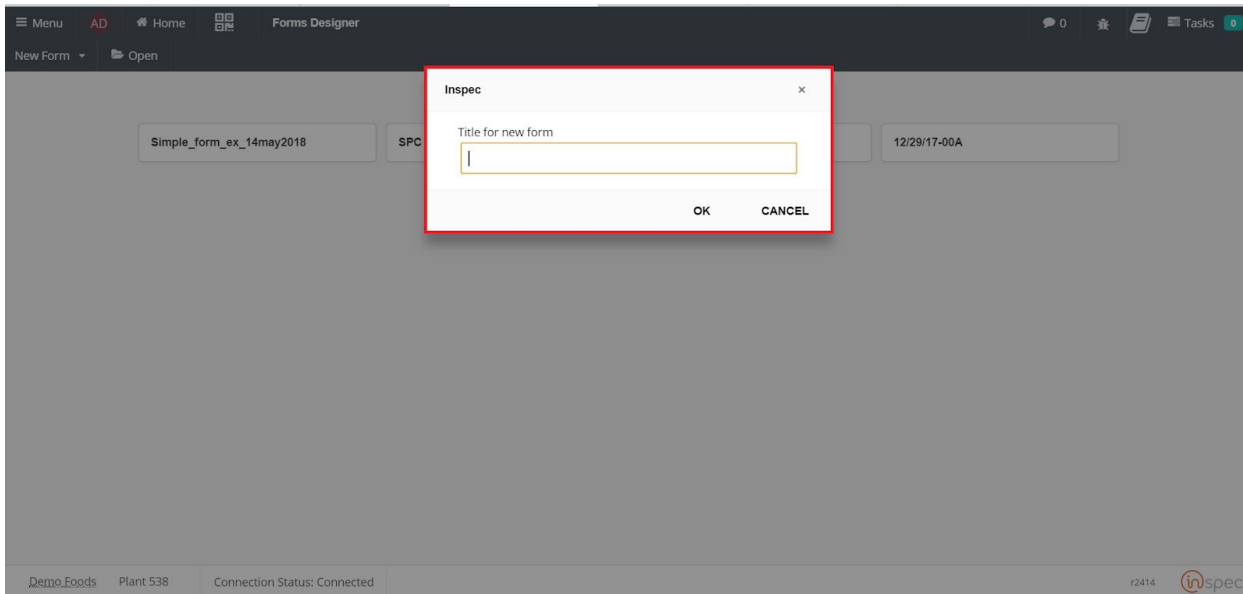


Once forms designer is open, toggle the <New Form> drop-down on the menu bar and select <Create Empty>. If copying or editing an existing form then select <Copy Existing> or <Open>.



Give your form the desired name that represents its function.





Upon naming the form the designer page will be brought up and controls for the creation of the form will be present across the menu bar and in the main field.

Create the controls unique to your needs, this is covered in both the Forms Designer section of the user guide and the “Simple Form” example. For this exercise we will use the previous example’s form and now we all attach actions to this form.

To create actions for a form, open the <Editing Properties> tab on the top menu bar, within forms designer. This will take the you to the properties page.

The screenshot shows the 'Forms Designer' interface for a 'Quality Assurance Form - Solder Joints Defects'. The 'Actions' pane is highlighted in the center, showing settings for 'On form load', 'On form finish', and 'Action Triggers'. The 'Behavior & Properties' pane is on the left, and the 'Security' pane is on the right.

**Behavior & Properties**

- Name: QualityAssuranceFormSolderJointsDefects
- Title: Quality Assurance Form - Solder Joints Defects
- Comment Tabs: None
- Required Context level: None
- Automatically Clear Autoset Value: Enabled
- Finish Form Authentication: Disabled
- Render Mode: Auto
- Form Groups: (empty)

**Actions**

- On form load: (dropdown menu)
- On form finish: (dropdown menu)
- Action Triggers:
 

Formula	Actions	One-Shot
No triggered actions	(dropdown menu)	One-Shot

**Security**

- Role for Approval: approver
- Role For Form Finish: None
- View other users forms role: None
- Delete form instance role: None

**Grouping & Automatic Creation**

- Mode: Disabled

From the properties page, the "Actions" pane is visible.

The screenshot shows the 'Forms Designer' interface for a 'Quality Assurance Form - Solder Joints Defects'. The 'Actions' pane is highlighted with a red border, showing settings for 'On form load', 'On form finish', and 'Action Triggers'. The 'Behavior & Properties' pane is on the left, and the 'Security' pane is on the right.

**Behavior & Properties**

- Name: QualityAssuranceFormSolderJointsDefects
- Title: Quality Assurance Form - Solder Joints Defects
- Comment Tabs: None
- Required Context level: None
- Automatically Clear Autoset Value: Enabled
- Finish Form Authentication: Disabled
- Render Mode: Auto
- Form Groups: (empty)

**Actions**

- On form load: (dropdown menu)
- On form finish: (dropdown menu)
- Action Triggers:
 

Formula	Actions	One-Shot
No triggered actions	(dropdown menu)	One-Shot

**Security**

- Role for Approval: approver
- Role For Form Finish: None
- View other users forms role: None
- Delete form instance role: None

**Grouping & Automatic Creation**

- Mode: Disabled

Within the "Actions" pane, a few settings can be toggled and set to perform different functions. "On form load", "On form finish", and "Action Triggers". "On form load" will specify a form to load on the opening of the form being edited. "On form finish" will specify a form to load on the closing of the form being edited. "Action Triggers" FINISH WHEN TICKET ANSWERED

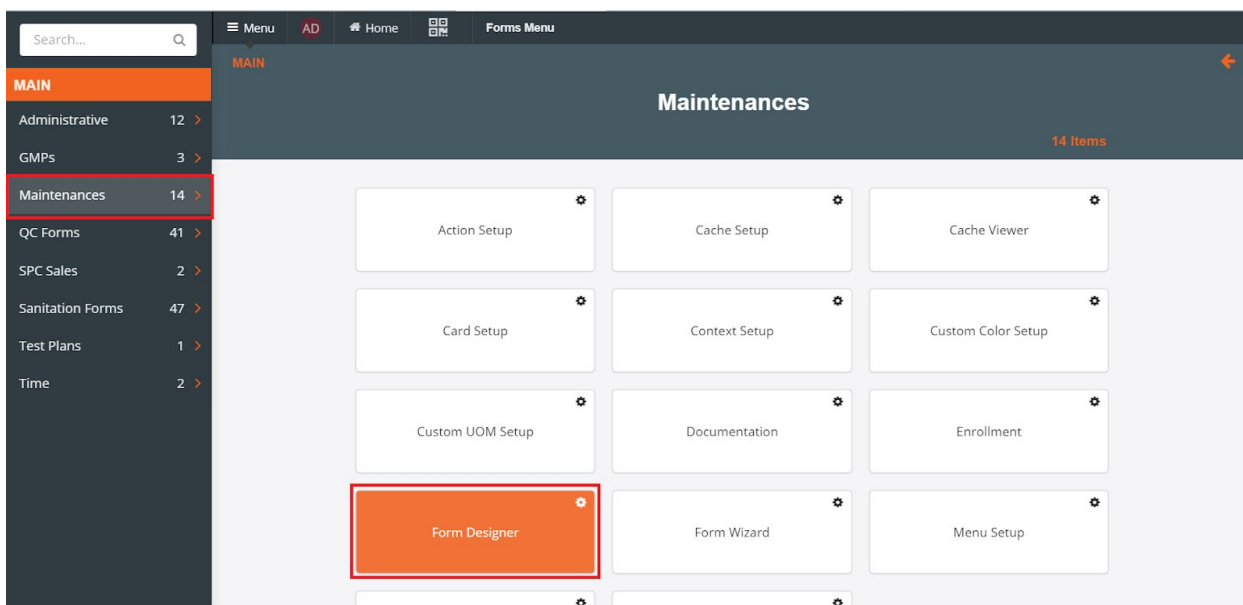
## Form with Data Sources

## Form with Workflow

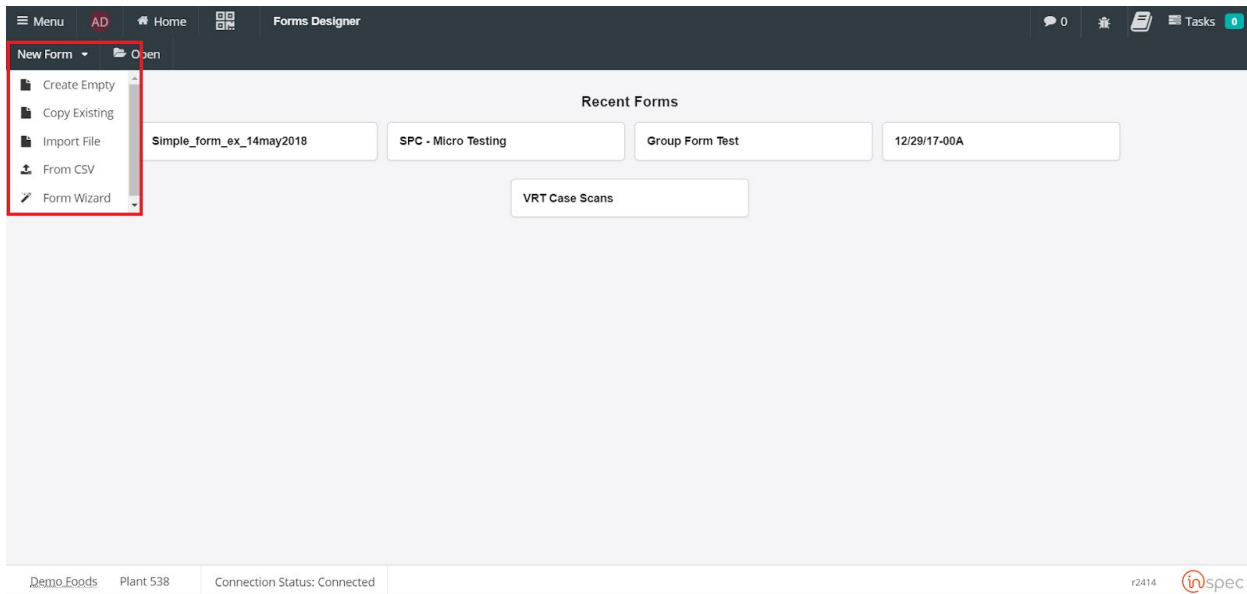
Workflow in a form is used to separate and organize sections of the form into specific areas for processing. It can be used in a few ways to tailor forms to the users need. To read more about the uses of the workflow of forms read the “Workflow” section of the user guide under “Forms Designer”.

To edit the workflow of a form you must be in the forms designer section of Inspec. This procedure will follow the same as each for example before this and only deviate when a form is opened or a new form is created.

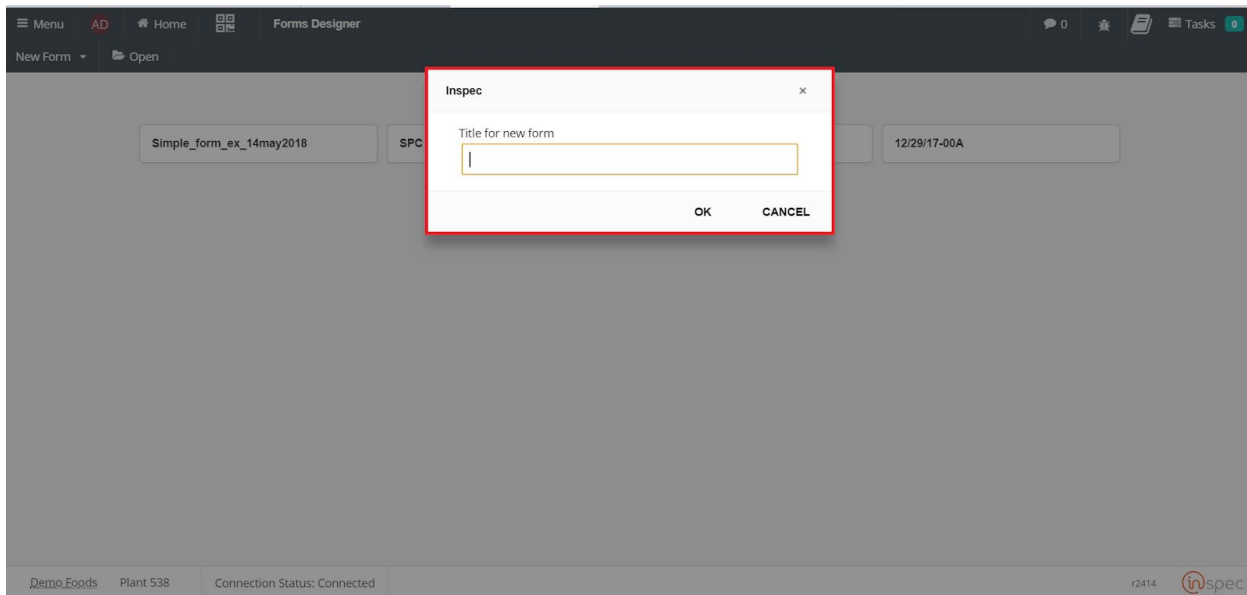
To create a form in Inspec open forms designer from the maintenances slide-out and selecting <Forms Designer>.

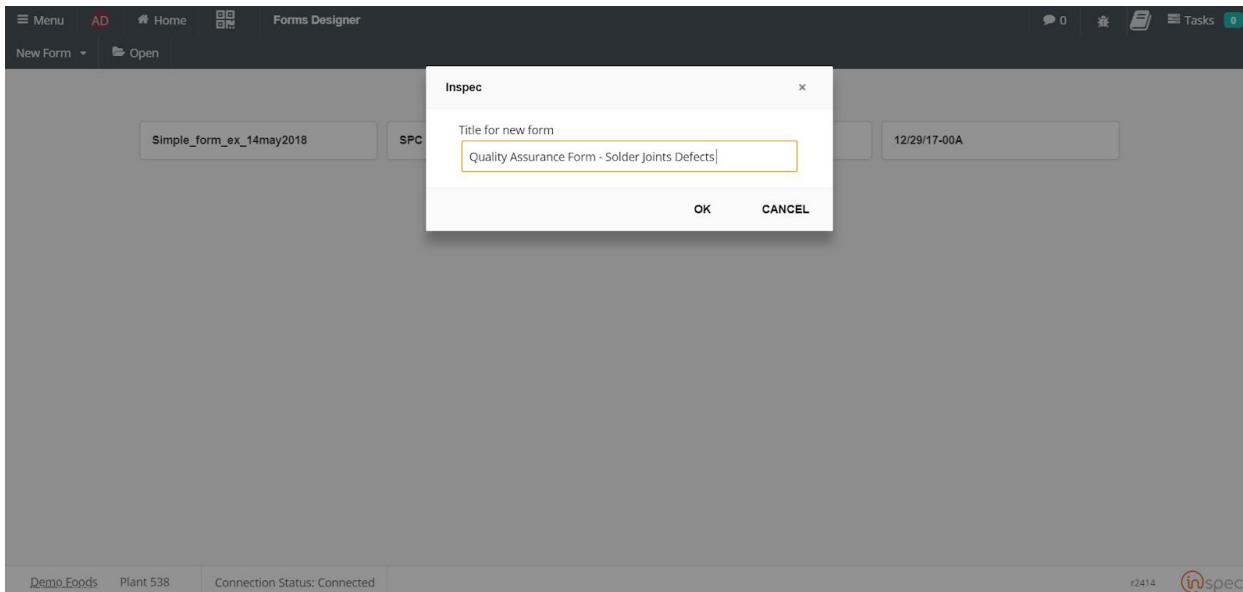


Once forms designer is open, toggle the <New Form> drop-down on the menu bar and select <Create Empty>. Or open an existing form with the <Open> button.



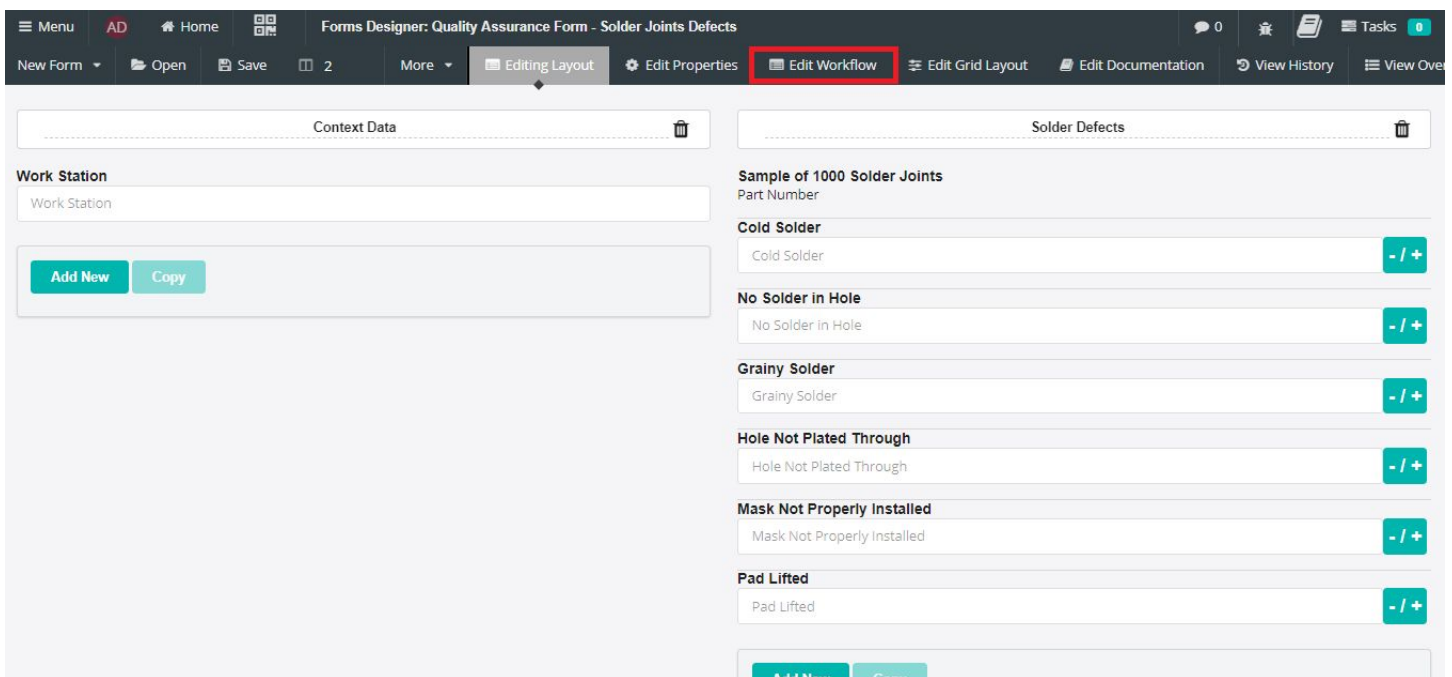
Give your form the desired name that represents its function.





Upon naming the form the designer page will be brought up and controls for the creation of the form will be present across the menu bar and in the main field.

Next, open the <Edit Workflow> button on the top menu bar.



This will present the current workflow screen. Standard forms normally start off with two sections in the workflow, “Initial Info” and “Finished”. In this example we will add a section called “Mid-Form”, simply because it will go between initial info and finished.

To create this new section select <Add New Workflow Segment> at the bottom of the workflow screen.

Finished

Finished Button Text

Reopen Finished Button Text

Single Finish Button

Re-Open Single Finish Button

On Enter Action (occurs every time a user enters the form)

On Exit Action

Permission (Role required to finish the workflow section)  
 (None)

Show Controls

Hide Controls

**Add New Workflow Segment**

Demo\_Foods Plant 538 Connection Status: Connected Form: f821563d-0087-448e-9ce6-038c962d1901 r2460 inSpec

You will be prompted to name you new workflow section. Here is where we will name it “Mid-Form”. Once the name is input select <OK> to enter your value.

Finished

Finished Button Text

Reopen Finished Button Text

Single Finish Button

Re-Open Single Finish Button

On Enter Action (occurs every time a user enters the form)

On Exit Action

Permission (Role required to finish the workflow section)  
 (None)

Show Controls

Hide Controls

**Add New Workflow Segment**

**Inspec** x

Title for new workflow

Rectangular Snip

OK CANCEL

Demo\_Foods Plant 538 Connection Status: Connected Form: f821563d-0087-448e-9ce6-038c962d1901 r2460 inSpec

Finished

Finished Button Text

Reopen Finished Button Text

Single Finish Button

True False

Re-Open Single Finish Button

True False

On Enter Action (occurs every time a user enters the form)

group All readonly true

On Exit Action

Permission (Role required to finish the workflow section)

(None)

Show Controls

Hide Controls

Add New Workflow Segment

Demo Foods Plant 538 Connection Status: Connected Form: f821563d-0087-448e-9ce6-038c962d1901 r2460 inspec

Now the new segment will be visible between the Initial Info and Finished segments. From this pane settings and changes can be made to our new segment to service your particular needs.

Only a few settings and changes will be made in this example. Please read the Workflow section if this User Guide for information pertaining to the function of each setting in the workflow segments.

Next, set the permissions required for that workflow section. In the “Permissions” field pick on option from the drop-down list of available permissions. For this form we will choose the “User” permission, which will allow any user to work within that segment.

Hide Controls

Title

Mid-Form

Finished Button Text

Finished Mid-Form

Reopen Finished Button Text

Single Finish Button

True False

Re-Open Single Finish Button

True False

On Enter Action (occurs every time a user enters the form)

group All readonly true

On Exit Action

Permission (Role required to finish the workflow section)

(None)

Show Controls

Hide Controls

Delete

Title



Mid-Form

Finished Button Text

Finished Mid-Form

Reopen Finished Button Text

Single Finish Button

True

False

Re-Open Single Finish Button

True

False

On Enter Action (occurs every time a user enters the form)

On Exit Action

Permission (Role required to finish the workflow section)

(None)

TEST GROUP ROLE

User

UserAdmin

diagnostics

approver

groupAdmin

bindall

Reopen Finished Button Text

True Controls

Title

Mid-Form

Finished Button Text

Finished Mid-Form

Reopen Finished Button Text

Single Finish Button

True

False

Re-Open Single Finish Button

True

False

On Enter Action (occurs every time a user enters the form)

On Exit Action

Permission (Role required to finish the workflow section)

user

Show Controls

Hide Controls

Title

As you may wish to differ specific controls from one workflow segment to another you can use the “Show/Hide Controls” fields. For this example we will choose to hide the “Work Station” control from this segment.

To do this, select the <Work Station> control in the “Hide Control” drop-down.

**Single Finish Button**  
 True False

**Re-Open Single Finish Button**  
 True False

**On Enter Action** (occurs every time a user enters the form)

**On Exit Action**

**Permission** (Role required to finish the workflow section)  
 user

**Show Controls**

**Hide Controls**

Work Station

Sample of 1000 Solder Joints

Cold Solder

No Solder in Hole

Grainy Solder

Hole Not Plated Through

Mask Not Properly Installed

Notified

True False

**Re-Open Single Finish Button**  
 True False

Delete

**Title**  
 Mid-Form

**Finished Button Text**  
 Finished Mid-Form

**Reopen Finished Button Text**

**Single Finish Button**  
 True False

**Re-Open Single Finish Button**  
 True False

**On Enter Action** (occurs every time a user enters the form)

**On Exit Action**

**Permission** (Role required to finish the workflow section)  
 user

**Show Controls**

**Hide Controls**  
 Work Station

**Title**  
 Finished

Delete

Next, we can choose to show the “Grainy Solder” control in this segment.

To do this, select the <Grainy Solder> option in the “Show Control” drop-down.

Mid-Form

**Finished Button Text**

Finished Mid-Form

**Reopen Finished Button Text**

**Single Finish Button**

True
False

**Re-Open Single Finish Button**

True
False

**Re-Open Single Finish Button Action**

Finish
Finish and Start New

**On Enter Action** (occurs every time a user enters the form)

**On Exit Action**

**Permission** (Role required to finish the workflow section)

(None)

**Show Controls**

**Hide Controls**

**Title**

Finished

**Finished Button Text**

Delete

**Single Finish Button**

True
False

**Re-Open Single Finish Button**

True
False

**Re-Open Single Finish Button Action**

Finish
Finish and Start New

**On Enter Action** (occurs every time a user enters the form)

**On Exit Action**

**Permission** (Role required to finish the workflow section)

(None)

**Show Controls**

Work Station
Sample of 1000 Solder Joints
Cold Solder
No Solder in Hole
Grainy Solder
Hole Not Plated Through
Mask Not Properly Installed
Red Lifted

**Single Finish Button**

Delete

Title

Mid-Form

Finished Button Text

Finished Mid-Form

Reopen Finished Button Text

Single Finish Button

True

False

Re-Open Single Finish Button

True

False

Re-Open Single Finish Button Action

Finish

Finish and Start New

On Enter Action (occurs every time a user enters the form)

On Exit Action

Permission (Role required to finish the workflow section)

(None)

Show Controls

Grainy Solder x

Hide Controls

Delete

Title

Next to cover the “Single Finish and Re-Open Single Finish” buttons. The “Single Finish Button” states whether the Finish button present in that workflow segment will be the end-all finish button or that the form will move onto a new workflow segment. To enable this feature select the <True> button in the “Single Finish Button” field. When this function is enabled you will next be prompted to specify the action desired. Whether to finish the form or to finish and open a new session upon finishing, select <Finish and Start New>. Inversely selecting <Finish> will only complete that session and nothing else.

Title

Mid-Form

Finished Button Text

Finished Mid-Form

Reopen Finished Button Text

Single Finish Button

True

False

Re-Open Single Finish Button

True

False

On Enter Action (occurs every time a user enters the form)

On Exit Action

Permission (Role required to finish the workflow section)

(None)

Show Controls

Hide Controls

Delete

Title

Finished

Title

Mid-Form

Finished Button Text

Finished Mid-Form

Reopen Finished Button Text

Single Finish Button

True

False

Single Finish Button Action

Finish

Finish and Start New

Re-Open Single Finish Button

True

False

On Enter Action (occurs every time a user enters the form)

On Exit Action

Permission (Role required to finish the workflow section)

(None)

Show Controls

Hide Controls

Delete

The “Re-Open Single Finish” button will open the new workflow segment. As before when this function is enabled you will next be prompted to specify the action desired. Whether to finish the form or to finish and open a new session. To open a new session upon finishing, select <Finish and Start New>. Inversely selecting <Finish> will only complete that session and nothing else.

Permission (Role required to finish the workflow section)

(None)

Show Controls

Hide Controls

Title

Mid-Form

Finished Button Text

Finished Mid-Form

Reopen Finished Button Text

Single Finish Button

True

False

Re-Open Single Finish Button

True

False

On Enter Action (occurs every time a user enters the form)

On Exit Action

Permission (Role required to finish the workflow section)

(None)

Show Controls

Delete

Hide Controls

Title

Mid-Form

Finished Button Text

Finished Mid-Form

Reopen Finished Button Text

Single Finish Button

True

False

Re-Open Single Finish Button

True

False

Re-Open Single Finish Button Action

Finish

Finish and Start New

On Enter Action (occurs every time a user enters the form)

On Exit Action

Permission (Role required to finish the workflow section)

(None)

Show Controls

Hide Controls

Delete

DO BUTTON TEXT WHEN POSSIBLE

## Reports

Simple Report

Drill-Down Report

Ad-Hoc Report

Formatted (Design) Report

Dashboard Report