





Inspec User Guide

ver. 2018-Mar

User Administration

Role Management

 System Roles	
Role Value	Role Name
diagnostics	Diagnostics
bindall	Binball
systemAdmin	System Administrator

 Admin Roles	
Role Value	Role Name
approvalAdmin	Approval Administrator
cardAdmin	Card Administrator
userAdmin	User Administrator

taskAdmin	Task Administrator
formAdmin	Form Administrator
menuAdmin	Menu Administrator
dataAdmin	Data Administrator
deleteAdmin	Delete Administrator

 Other Roles	
Role Value	Role Name
user (default)	User
GlobalStickyRole	Global Sticky Role
reopenFormsRole	Reopen Form Role
approvalRole	Approval Role

Windows Active Directory (A/D) User Authentication (ToDo)

Menu

Home

mjc

Settings

Settings

Restore Defaults

All Users

All Roles

Context Control Legend

Enable to have system convert datetime2 to datetime

Context Setup

Select the context components to use

Create Tables Automatically

Cron History Purge Days

Number of days to retain cron history entries

Custom Colors

User-defined colors

Default AD DNS

List of default DNS domains (@example1.com, @example2.com)

Default AD Domain

List of default AD domains (DOMAIN1, DOMAIN2)

Environment Settings:

- ldap_servername
- ldap_extended

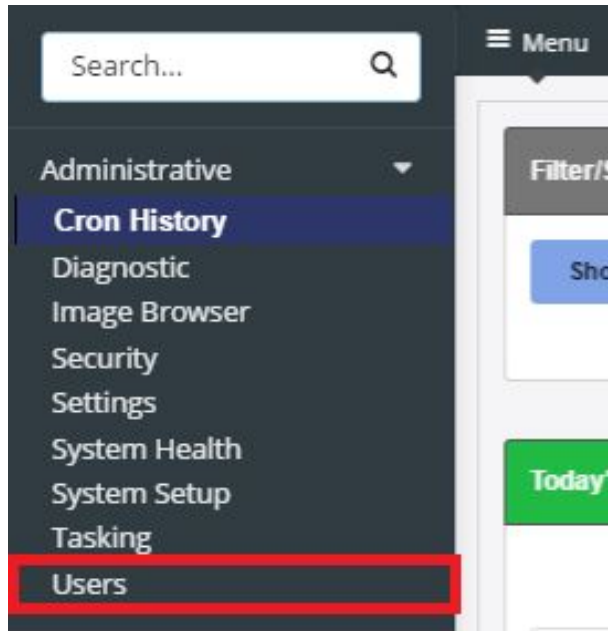
How to Add, Setup and Configure Users

Role Permissions Needed

You need to log in as a user who has been given the “Admin” role.

Once in, open the Main Menu, and select Users under the Administrative section.

Add a User from the User Maintenance



You will see the Local User Maintenance screen.

 A screenshot of the 'User Maintenance' screen in a web application. The top navigation bar shows 'Menu', 'Home', 'admin', and 'User Maintenance'. Below this, there are tabs for 'Editing User Maintenance', 'Edit User Context Maintenance', 'Edit User Enrollment', and 'Edit Kiosks'. The main section is titled 'Add/Edit User' and contains form fields for 'Username' (jDoe), 'Full Name' (John Doe), 'Email' (john.Doe@example.local), and 'Password'. A 'Save' button is next to the password field. To the right, there is a 'Bulk' section with an 'Import New Users' button. Below the form is a table listing existing users with columns for 'Username', 'Full Name', and 'Email'. Each row has a set of action buttons: 'Edit User', 'Remove' (in red), 'Reset Password', 'Send Enrollment Email', 'Change ContextRoles', and 'Make Kiosk'. The table shows six users: jsc, jsc2, rmp, TEST TOM, testenroll, and united7221. At the bottom, there is a status bar showing 'Demo Foods -> Plant 538' and 'Connection Status: Connected'.

To add a User:

Enter the information about the user at the top of the screen. Fill out the username, the user's full name, email, and password, then press the Add/Edit User button.

After the user has been added, select the user in the list, and press the Modify User button. This will take you to that user's information page.

MenuHomeadminUser MaintenanceTasks

Editing User MaintenanceEditing User Context MaintenanceEdit User EnrollmentEdit Kiosks

Add/Edit User

Username

Full Name

Email

Password

TEST TOM

TEST TOM JOE

ZIPPY@ZIPPY.COM

Save

Cancel

Bulk

+ Import New Users

Show 25 rows per page

1

Username	Full Name	Email					
jsc	Jack	jsc@coolearth.com	Edit User	Remove	Reset Password	Send Enrollment Email	Change ContextRoles
jsc2	Jack ColemanOther	jsc2@mail.com	Edit User	Remove	Reset Password	Send Enrollment Email	Change ContextRoles
rmp	Ryan	rmp@coolearth.com	Edit User	Remove	Reset Password	Send Enrollment Email	Change ContextRoles
TEST TOM	TEST TOM JOE	ZIPPY@ZIPPY.COM	Edit User	Remove	Reset Password	Send Enrollment Email	Change ContextRoles
testenroll	testenroll	rmp+123@coolearth.com	Edit User	Remove	Reset Password	Send Enrollment Email	Change ContextRoles
united7221	United Creations	it@unitedcreations.com	Edit User	Remove	Reset Password	Send Enrollment Email	Change ContextRoles

Demo Foods → Plant 538Connection Status: Connectedr1879inspec

MenuHomeadminUser MaintenanceTasks

Edit User MaintenanceEditing User Context MaintenanceEdit User EnrollmentEdit Kiosks

Select Context To Assign

Need to select (in any order): the context to use from the dropdown below, and one or more users by clicking on the checkbox for that user. Then press the button for the desired activity.

Select Context

Add Users To ContextRemove Users From ContextReset To Default

Show 25 rows per page

1

Select User	User Name	Primary Context
<div>Clear</div>		
<input type="checkbox"/>	admin	Demo Foods → Plant 538
<input type="checkbox"/>	jsc	Demo Foods → HQ
<input type="checkbox"/>	jsc2	Demo Foods
<input type="checkbox"/>	rmp	Demo Foods → Plant 538
<input type="checkbox"/>	TEST TOM	Demo Foods → HQ
<input type="checkbox"/>	testenroll	Demo Foods → Plant 538
<input type="checkbox"/>	united7221	United Creations → UC1

Demo Foods → Plant 538Connection Status: Connectedr1879inspec

Menu

Home

admin

User Maintenance

Edit User Maintenance

Editing User Context Maintenance

Edit User Enrollment

Edit Kiosks

Tasks

Select Context To Assign

Need to select (in any order): the context to use from the dropdown below, and one or more users by clicking on the checkbox for that user. Then press the button for the desired activity.

Add Users To Context

Remove Users From Context

Reset To Default

Select Context

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inspec

Select User	User Name	Primary Context
<input type="checkbox"/>	admin	Demo Foods → Plant 538
<input type="checkbox"/>	jsc	Demo Foods → HQ
<input type="checkbox"/>	jsc2	Demo Foods
<input type="checkbox"/>	rmp	Demo Foods → Plant 538
<input checked="" type="checkbox"/>	TEST TOM	Demo Foods → HQ
<input type="checkbox"/>	testenroll	Demo Foods → Plant 538
<input type="checkbox"/>	united7221	United Creations → UC1

Demo Foods → Plant 538

Connection Status: Connected

Menu

Home

admin

User Maintenance

Edit User Maintenance

Edit User Context Maintenance

Editing User Enrollment

Edit Kiosks

Tasks

User Enrollment

CSV E-Mail List

Example: user1@inspec.com, user2@inspec.com

Send Enrollment Emails

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inspec

Username	Full Name	Email	
jsc	Jack	jsc@coolearth.com	Send Enrollment Email
jsc2	Jack ColemanOther	jsc2@mail.com	Send Enrollment Email
rmp	Ryan	rmp@coolearth.com	Send Enrollment Email
TEST TOM	TEST TOM JOE	ZIPPY@ZIPPY.COM	Send Enrollment Email
testenroll	testenroll	rmp+123@coolearth.com	Send Enrollment Email
united7221	United Creations	it@unitedcreations.com	Send Enrollment Email

Demo Foods → Plant 538

Connection Status: Connected

Menu
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Edit User Maintenance
Edit User Context Maintenance
Editing User Enrollment
Edit Kiosks

User Enrollment

CSV E-Mail List

Example: user1@inspec.com, user2@inspec.com

Send Enrollment Emails

Show 25 rows per page

Username	Full Name	Email	
jsc	Jack	jsc@coolearth.com	Send Enrollment Email
jsc2	Jack ColemanOther	jsc2@mail.com	Send Enrollment Email
rmp	Ryan	rmp@coolearth.com	Send Enrollment Email
TEST TOM	TEST TOM JOE	ZIPPY@ZIPPY.COM	Send Enrollment Email
testenroll	testenroll	rmp+123@coolearth.com	Send Enrollment Email
united7221	United Creations	it@unitedcreations.com	Send Enrollment Email

Demo Foods → Plant 538
Connection Status: Connected
r1879 inspec

Menu
Home
admin
User Maintenance
Tasks

Edit User Maintenance
Edit User Context Maintenance
Edit User Enrollment
Editing Kiosks

Logged Out Kiosks

Device ID

Device ID	IP	Last Seen	
d0db11f5-bc02-4d6a-849d-5efe2b0dbf03	172.17.0.3	27 days ago	Login In Kiosk
71ef94c6-7cf6-4d8f-9f77-e342b16b0b5d	172.17.0.3	8 days ago	Login In Kiosk

Active Kiosks & Devices

Device ID	IP	Last Seen	Kiosk User
907431aa-ee4f-49d6-bbb4-cdf288a2692c	172.17.0.3	6 days ago	(N/A)
92c13786-6c65-4952-8ae2-0dbac723a2c8	172.17.0.3	4 days ago	(N/A)
beeec9bf-7fee-4f92-98c9-38641af52444	172.17.0.3	32 minutes ago	(N/A)

Recent Authentication Requests

Device ID	Seen	Token	Kiosk Binding	User Binding
No recent requests				

Demo Foods → Plant 538
Connection Status: Connected
r1879 inspec

Add a list of Users via the Import process

Bulk

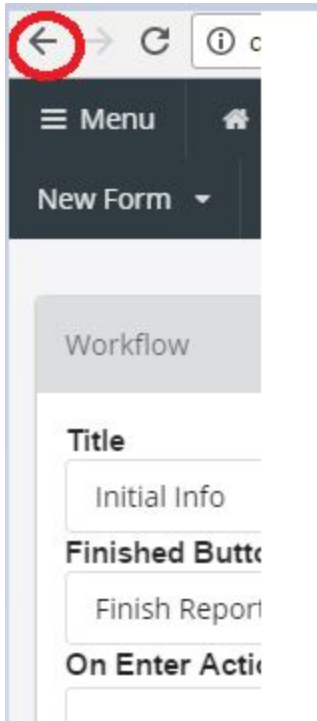
+
Import New Users

How to Configure a User

Set the user's context to be Icicle->Gordon Jensen (or whatever is valid for your user). To do this, go to the Context portion of the screen, drop-down the list, and select Gordon Jensen from the list.

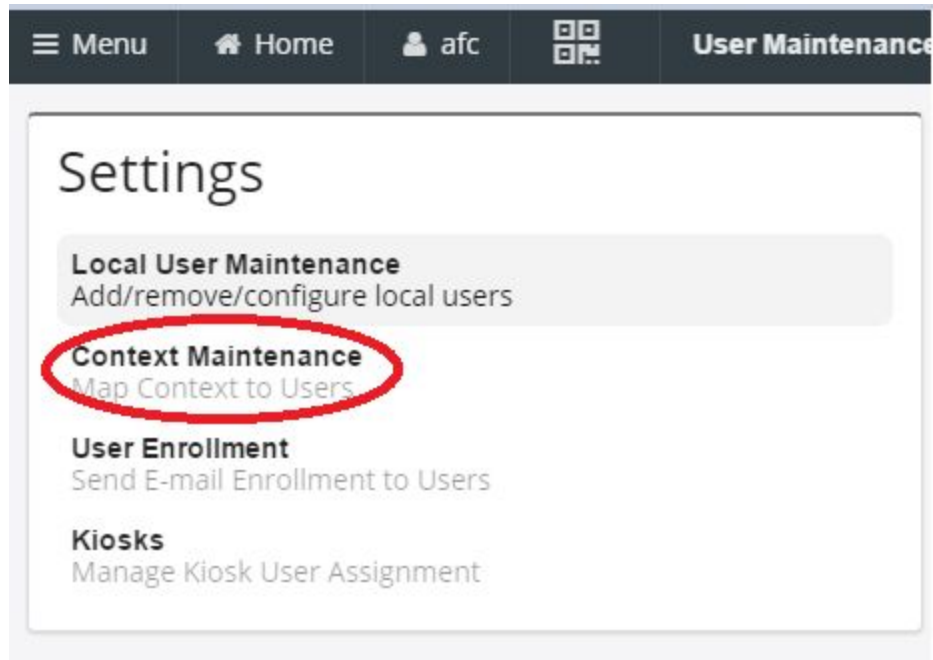
In addition, you need to set the role to be "User". In the Roles & Role Groups section, select "User" from the dropdown, or type it in and press the Add Role button.

When you are finished, return to the User Maintenance screen by pressing the back arrow (<) in the upper left hand corner of the browser window.

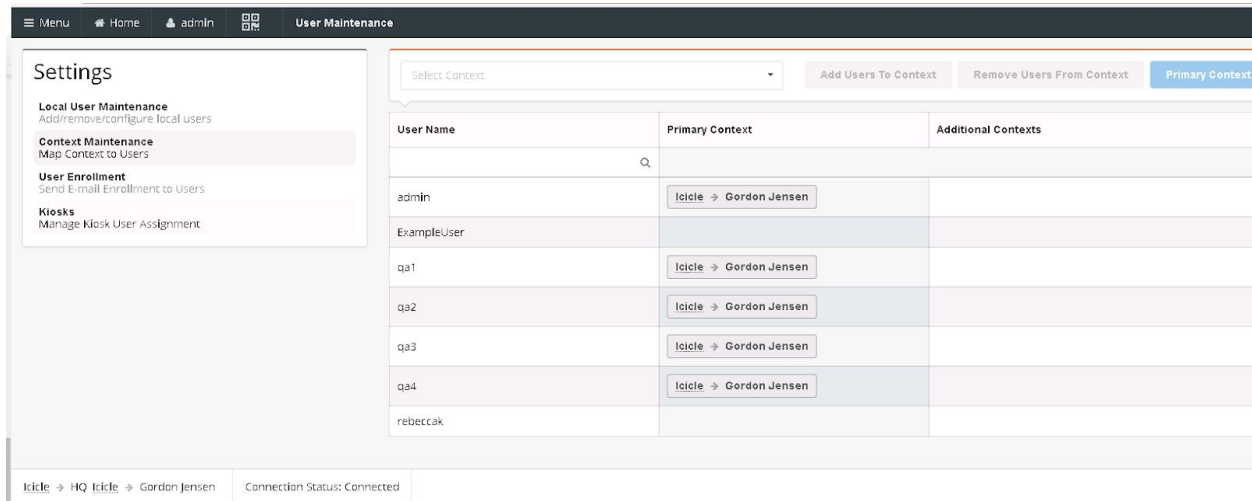


User Context Administration

If you have multiple users to add to the same context, then you can do all of them at the same time through the Context Maintenance screen.



Select all the users in the list that you want to set, select the context from the dropdown, then press the Add Users To Context button to do all of the users at once.

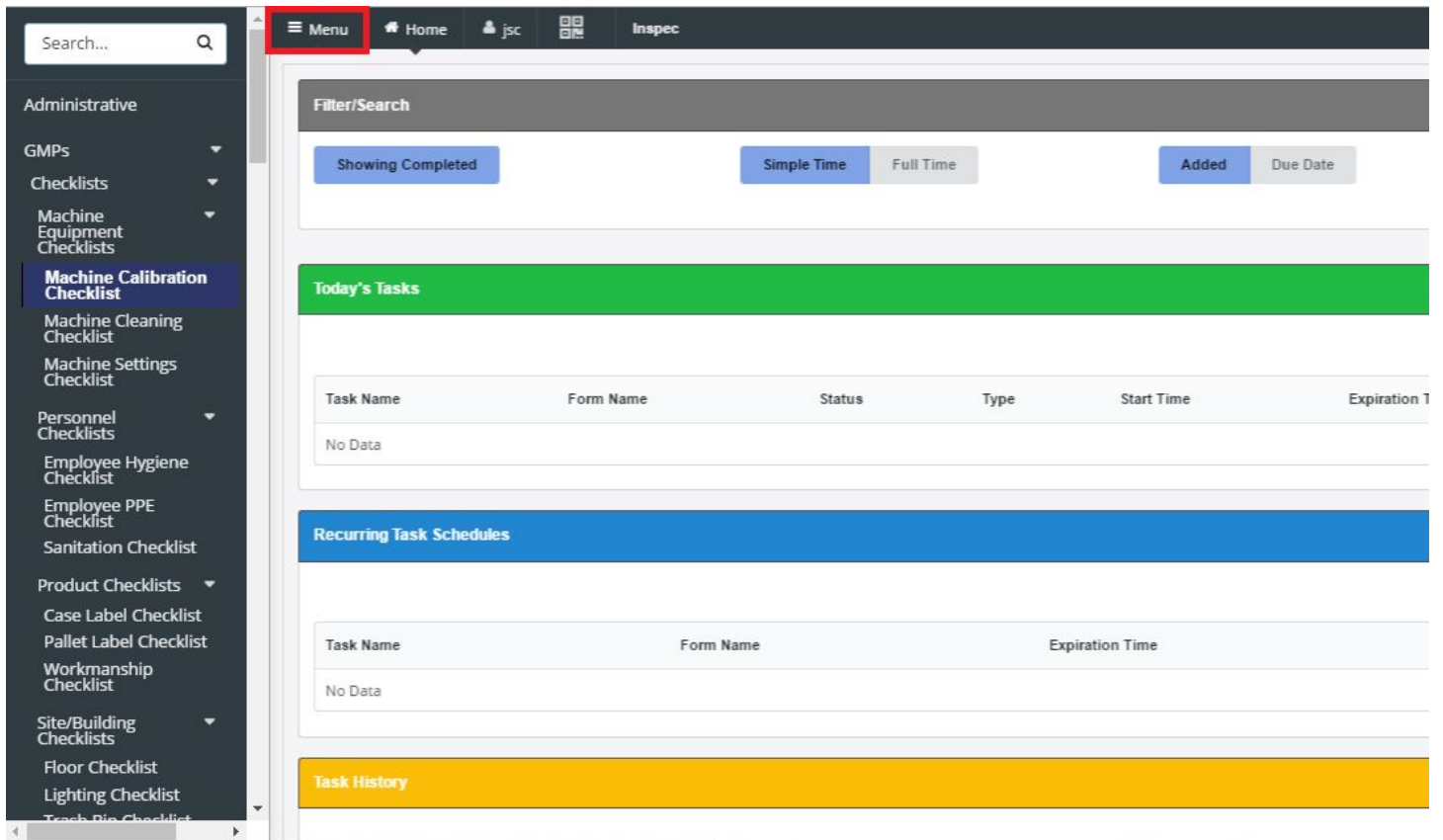


Password Resetting

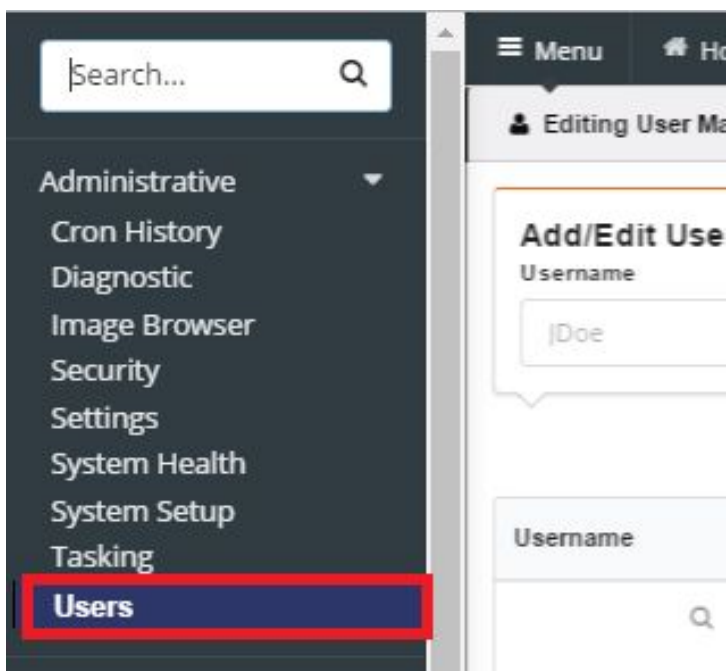
When the user wishes to reset their password they can do so as an administrator. A user can not reset a password if they do not have administrator privileges.

To reset a user's password,

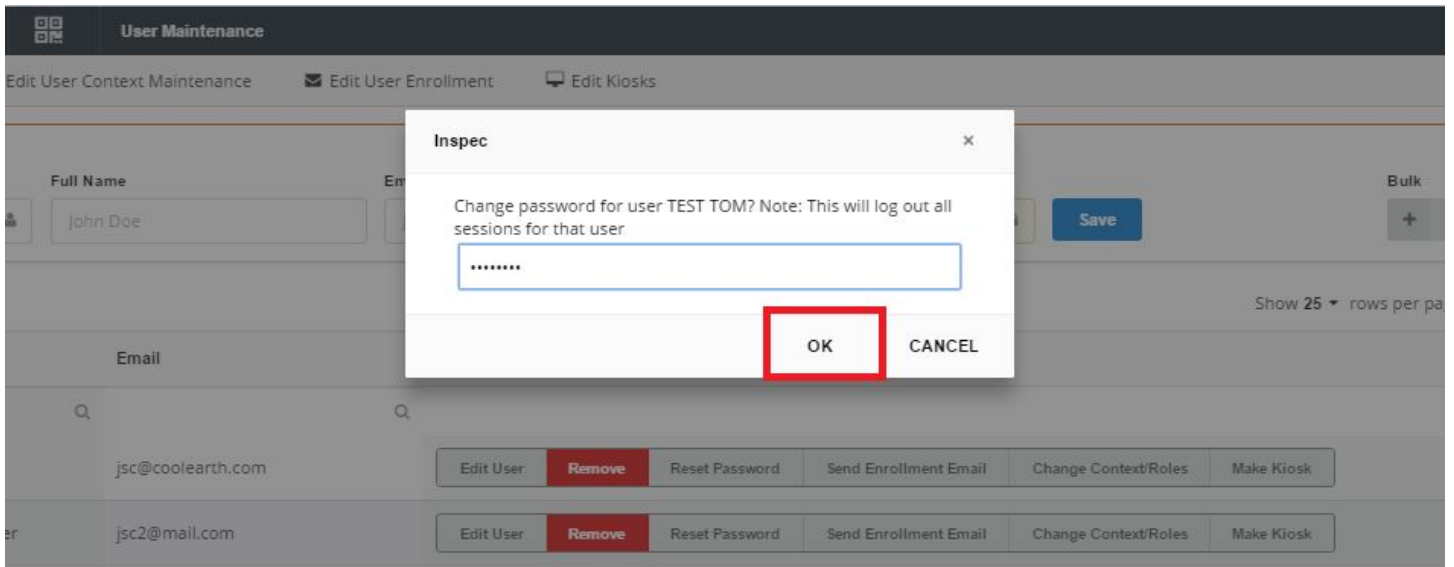
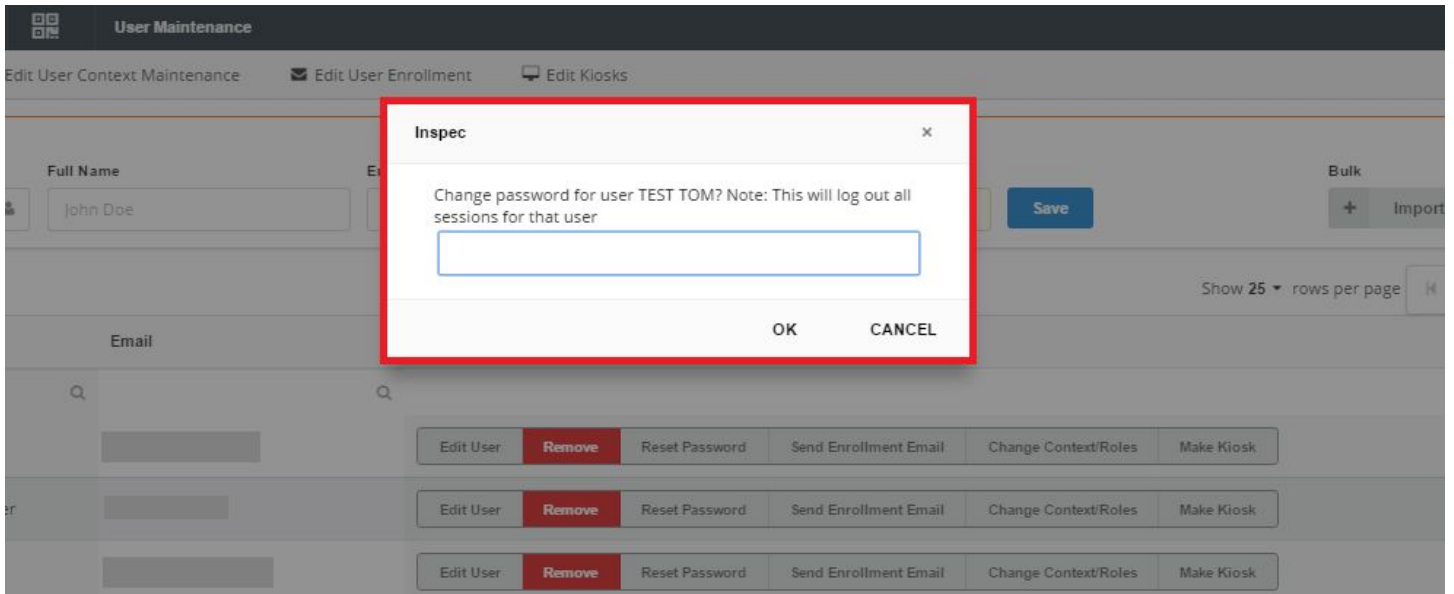
Select the <Menu> slide-out from the top menu bar.



Select the <Users> option from the administrative drop-down.




The user will see a list of all users in the specific system. From here the administrator can select the user they wish to augment. By selecting <Reset Password> a dialog box will be presented to the administrator that will prompt the administrator to input the new password and select “ok” to authorize the new password.



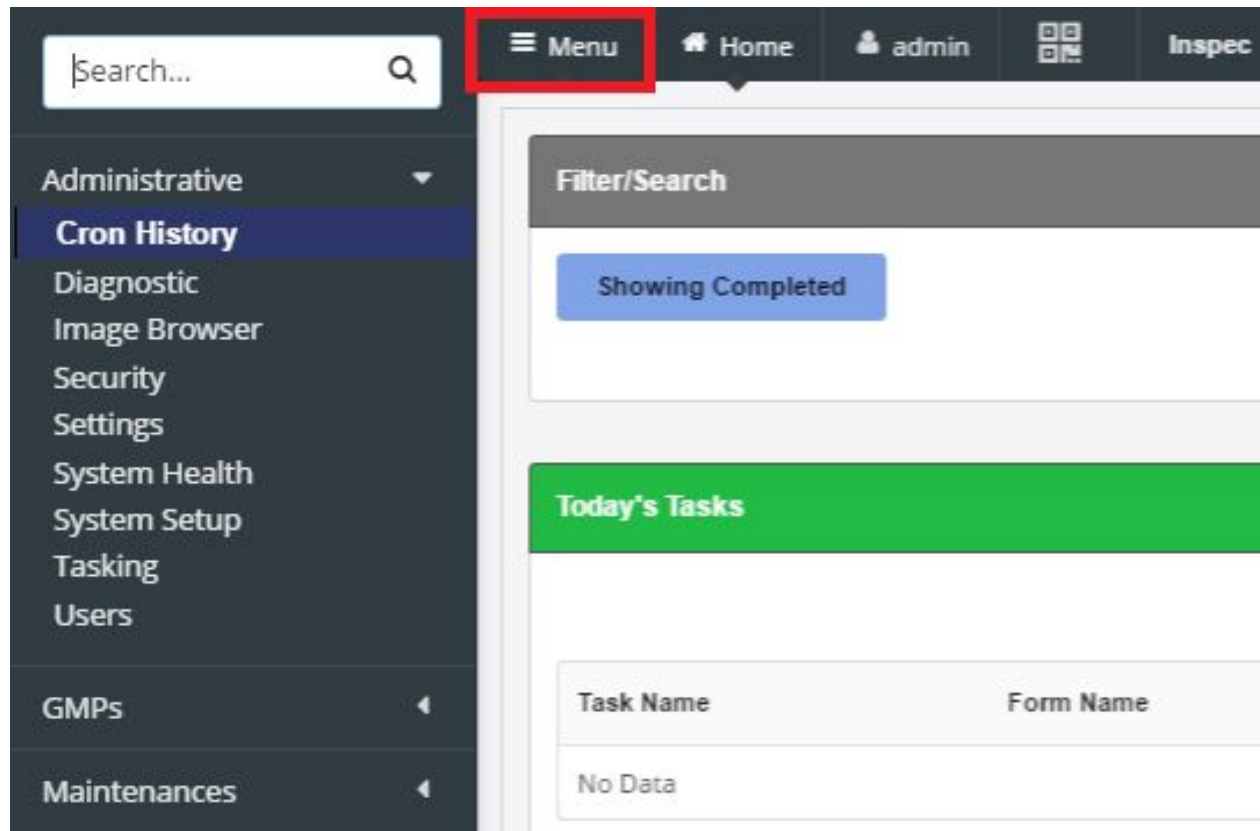
Resetting a user's password will log them out of all sessions and require them to log into new sessions.

User Context Maintenance

<div>  Role Permissions Needed </div>	
Role Value	Role Name
userAdmin	User Administrator

The user context maintenance allows a user to add, remove, reset, and assign importance to contexts.

To get to the user context maintenance select the <Menu> slide-out. Select the <Administrative> drop-down and <Users>. Next, select the <Editing User Context Maintenance> tab, from the top submenu.



Search...

Q

Administrative

Cron History

Diagnostic

Image Browser

Security

Settings

System Health

System Setup

Tasking

Users

GMPs

Maintenances

Menu

Home

admin

Inspection

Filter/Search

Showing Completed

Today's Tasks

Task Name	Form Name
No Data	

Search...

Q

Administrative

Cron History

Diagnostic

Image Browser

Security

Settings

System Health

System Setup

Tasking

Users

GMPs

Maintenances

QC Forms

Menu

Home

admin

Inspection

Filter/Search

Showing Completed

Today's Tasks

Task Name	Form Name
No Data	

Menu

Home

admin

User Maintenance

Tasks

Editing User Maintenance

Edit User Context Maintenance

Edit User Enrollment

Edit Kiosks

Add/Edit User

Username

jDoe

Full Name

John Doe

Email

jsc

Password

....

Save

Bulk

+ Import New Users

Show 25 rows per page

1

Username	Full Name	Email	
jsc	Jack	jsc@coolearth.com	<div>Edit User</div> <div>Remove</div> <div>Reset Password</div> <div>Send Enrollment Email</div> <div>Change Context/Roles</div> <div>Make Kiosk</div>
jsc2	Jack ColemanOther	jsc2@mail.com	<div>Edit User</div> <div>Remove</div> <div>Reset Password</div> <div>Send Enrollment Email</div> <div>Change Context/Roles</div> <div>Make Kiosk</div>
rmp	Ryan	rmp@coolearth.com	<div>Edit User</div> <div>Remove</div> <div>Reset Password</div> <div>Send Enrollment Email</div> <div>Change Context/Roles</div> <div>Make Kiosk</div>
TEST TOM	TEST TOM JOE	ZIPPY@ZIPPY.COM	<div>Edit User</div> <div>Remove</div> <div>Reset Password</div> <div>Send Enrollment Email</div> <div>Change Context/Roles</div> <div>Make Kiosk</div>
testenroll	testenroll	rmp+123@coolearth.com	<div>Edit User</div> <div>Remove</div> <div>Reset Password</div> <div>Send Enrollment Email</div> <div>Change Context/Roles</div> <div>Make Kiosk</div>
united7221	United Creations	it@unitedcreations.com	<div>Edit User</div> <div>Remove</div> <div>Reset Password</div> <div>Send Enrollment Email</div> <div>Change Context/Roles</div> <div>Make Kiosk</div>

Demo Foods → Plant 538

Connection Status: Connected

r1859

in spec

Select the user that needs contexts added or subtracted from them, with the check box.

Menu

Home

admin

User Maintenance

Tasks

Edit User Maintenance

Editing User Context Maintenance

Edit User Enrollment

Edit Kiosks

Select Context To Assign

Add Users To Context

Remove Users From Context

Primary Context

Reset To Default

Need to select (in any order): the context to use from the dropdown below, and one or more users by clicking on the checkbox for that user. Then press the button for the desired activity.

Select Context

Show 25 rows per page

1

Select User	User Name	Primary Context	Additional Contexts
<input type="checkbox"/>	admin	Demo Foods → Plant 538	
<input type="checkbox"/>	jsc		
<input type="checkbox"/>	jsc2		
<input checked="" type="checkbox"/>	rmp	419	
<input type="checkbox"/>	TEST TOM		
<input type="checkbox"/>	testenroll		
<input type="checkbox"/>	united7221	United Creations → UC1	

Select context to assign in the drop-down submenu.

Menu Home admin User Maintenance Tasks

Edit User Maintenance Editing User Context Maintenance Edit User Enrollment Edit Kiosks

Select Context To Assign

Need to select (in any order): the context to use from the dropdown below, and one or more users by clicking on the checkbox for that user. Then press the button for the desired activity.

Add Users To Context Remove Users From Context Primary Context Reset To Default

Select Context

Demo Foods

United Creations

Tuna

419

SITE

UC1

Site1

admin

Plant 538

Additional Contexts

Show 25 rows per page

Select User	User Name	Primary Context	Additional Contexts
<input type="checkbox"/>	admin		
<input type="checkbox"/>	jsc		
<input type="checkbox"/>	jsc2		
<input checked="" type="checkbox"/>	rmp	419	
<input type="checkbox"/>	TEST TOM		
<input type="checkbox"/>	testenroll		
<input type="checkbox"/>	united7221	United Creations → UC1	

next, select the function the user wishes to perform with the context. <Add Users to Context>, <Remove Users from Context>, <Primary Context>, <Reset to Default>.

<Add Users to Context> will add the selected context to the selected user(s).

<Remove Users from Context> will remove the selected context from the selected user(s).

<Primary Context> will make the selected context the primary context of the selected user(s).

<Reset to Default> will remove non-default contexts and replace them with default contexts.

Context actions.

Menu Home admin User Maintenance Tasks

Edit User Maintenance Editing User Context Maintenance Edit User Enrollment Edit Kiosks

Select Context To Assign

Need to select (in any order): the context to use from the dropdown below, and one or more users by clicking on the checkbox for that user. Then press the button for the desired activity.

United Creations

Add Users To Context Remove Users From Context Primary Context Reset To Default

Show 25 rows per page

Select User	User Name	Primary Context	Additional Contexts
<input type="checkbox"/>	admin	Demo Foods → Plant 538	
<input type="checkbox"/>	jsc		
<input type="checkbox"/>	jsc2		
<input checked="" type="checkbox"/>	rmp	419	
<input type="checkbox"/>	TEST TOM		
<input type="checkbox"/>	testenroll		
<input type="checkbox"/>	united7221	United Creations → UC1	

Adding user(s) to a context.

Menu Home admin User Maintenance

Edit User Maintenance
Editing User Context Maintenance
Edit User Enrollment
Edit Kiosks

Tasks 0

Select Context To Assign

Need to select (in any order): the context to use from the dropdown below, and one or more users by clicking on the checkbox for that user. Then press the button for the desired activity.

419

Add Users To Context
Remove Users From Context
Primary Context
Reset To Default

Show 25 rows per page

1

Select User	User Name	Primary Context	Additional Contexts
<input type="checkbox"/>	admin	Demo Foods → Plant 538	
<input type="checkbox"/>	jsc		
<input type="checkbox"/>	jsc2		
<input checked="" type="checkbox"/>	rmp	Demo Foods → Plant 538	<div>Demo Foods</div> <div>419</div>
<input type="checkbox"/>	TEST TOM		
<input type="checkbox"/>	testenroll		
<input type="checkbox"/>	united7221	United Creations → UC1	

Setting primary contexts.

Menu Home admin User Maintenance

Edit User Maintenance
Editing User Context Maintenance
Edit User Enrollment
Edit Kiosks

Tasks 0

Select Context To Assign

Need to select (in any order): the context to use from the dropdown below, and one or more users by clicking on the checkbox for that user. Then press the button for the desired activity.

419

Add Users To Context
Remove Users From Context
Primary Context
Reset To Default

Show 25 rows per page

1

Select User	User Name	Primary Context	Additional Contexts
<input type="checkbox"/>	admin	Demo Foods → Plant 538	
<input type="checkbox"/>	jsc		
<input type="checkbox"/>	jsc2		
<input checked="" type="checkbox"/>	rmp	419	<div>Demo Foods → Plant 538</div> <div>Demo Foods</div>
<input type="checkbox"/>	TEST TOM		
<input type="checkbox"/>	testenroll		
<input type="checkbox"/>	united7221	United Creations → UC1	

Resetting to Default

Menu
Home
admin
User Maintenance
Tasks

Edit User Maintenance
Editing User Context Maintenance
Edit User Enrollment
Edit Kiosks

Select Context To Assign
Need to select (in any order): the context to use from the dropdown below, and one or more users by clicking on the checkbox for that user. Then press the button for the desired activity.

Add Users To Context
Remove Users From Context
Primary Context
Reset To Default

Demo Foods

Show 25 rows per page

Select User	User Name	Primary Context	Additional Contexts
<input type="checkbox"/>	admin	Demo Foods → Plant 538	
<input type="checkbox"/>	jsc	Demo Foods → HQ	
<input type="checkbox"/>	jsc2	Demo Foods	
<input checked="" type="checkbox"/>	rmp	419	
<input type="checkbox"/>	TEST TOM	Demo Foods → HQ	
<input type="checkbox"/>	testenroll	Demo Foods → Plant 538	
<input type="checkbox"/>	united7221	United Creations → UC1	

Menu
Home
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User Maintenance
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Edit User Maintenance
Editing User Context Maintenance
Edit User Enrollment
Edit Kiosks

Select Context To Assign
Need to select (in any order): the context to use from the dropdown below, and one or more users by clicking on the checkbox for that user. Then press the button for the desired activity.

Add Users To Context
Remove Users From Context
Primary Context
Reset To Default

419 → black

Show 25 rows per page

Select User	User Name	Primary Context	Additional Contexts
<input type="checkbox"/>	admin	Demo Foods → Plant 538	
<input type="checkbox"/>	jsc	Demo Foods → HQ	
<input type="checkbox"/>	jsc2	Demo Foods	
<input checked="" type="checkbox"/>	rmp	Demo Foods → Plant 538	
<input type="checkbox"/>	TEST TOM	Demo Foods → HQ	
<input type="checkbox"/>	testenroll	Demo Foods → Plant 538	
<input type="checkbox"/>	united7221	United Creations → UC1	

User Enrollment Maintenance (ToDo)


<div> <div>Roles</div> <div>Role Permissions Needed</div> </div>	
Role Value	Role Name
userAdmin	User Administrator

--	--

Kiosk Management (ToDo LAST)

Group Management



<div>  Role Permissions Needed </div>	
Role Value	Role Name
cardAdmin	Card Administrator
formAdmin	Form Administrator
menuAdmin	Menu Administrator
dataAdmin	Data Administrator
deleteAdmin	Delete Administrator

Other Roles:

- User (Default)
 - reopen forms
- Global Sticky Role (Thumb-tack feature)
- Reopen Forms Role (make this a super-cede to the "reopen forms" role.)
- Approval Role (make this a super-cede to the "approver" role.)

See the “Security Window”

To get to the user context maintenance select the <Menu> slide-out. Select the <Administrative> drop-down and select <Security>.

Search...

Menu Home admin Inspec

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

GMPs
Maintenances

Filter/Search

Showing Completed

Today's Tasks

Task Name	Form Name
No Data	

Search...

Menu Home admin Inspec

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

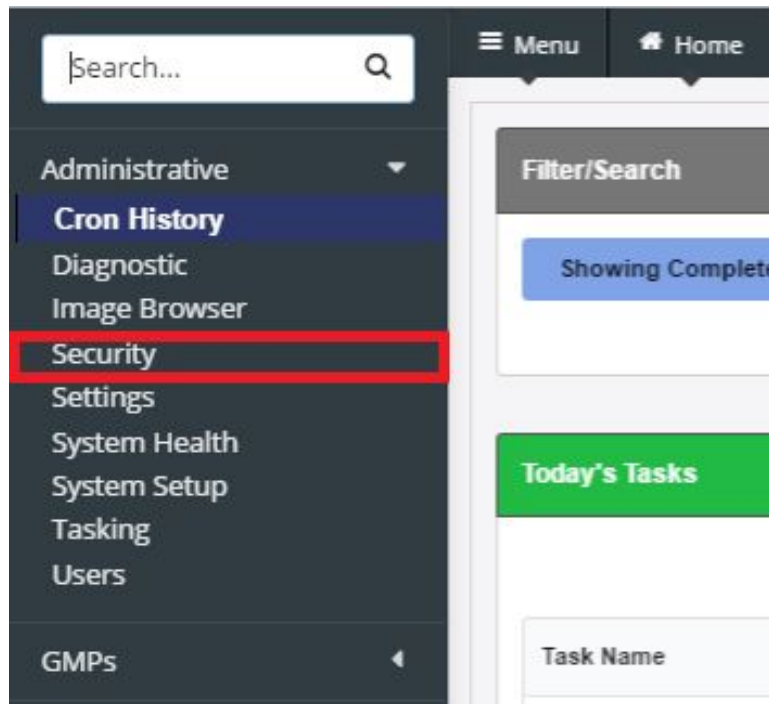
GMPs
Maintenances

Filter/Search

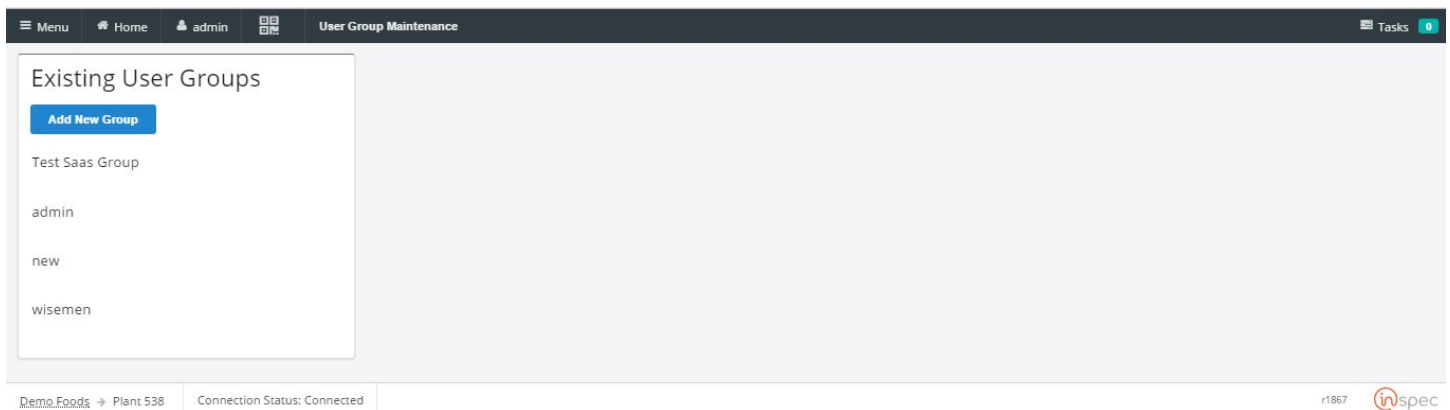
Showing Completed

Today's Tasks

Task Name	Form Name
No Data	



Once in the groups screen, the user can select an existing group or create a new group.



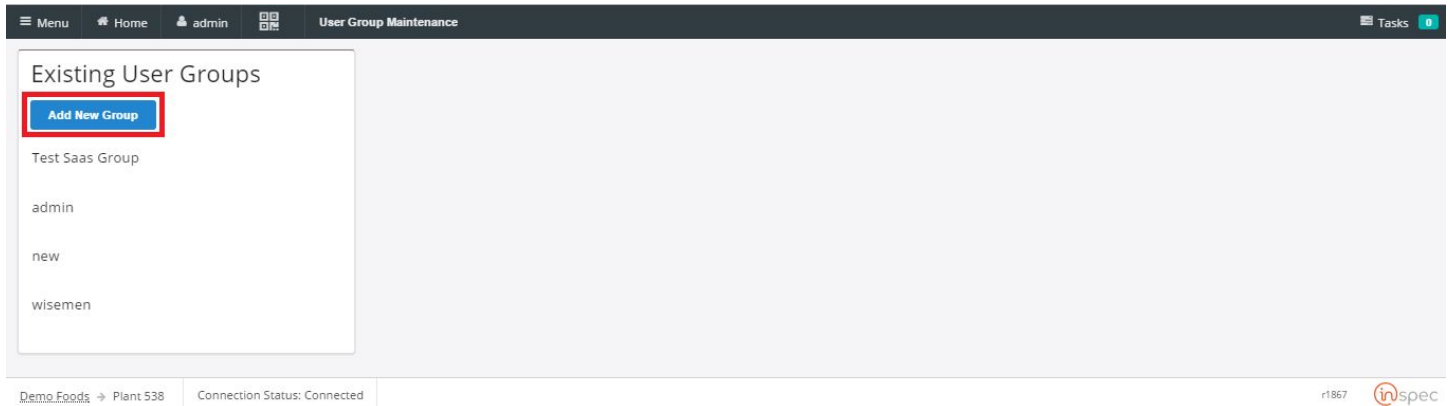
Can see and access /qc/review (Form Review) window (to be place in the Maintenance menu)
(example: <http://qcproduction.coolearth.com/qc/review>)

Group Administration

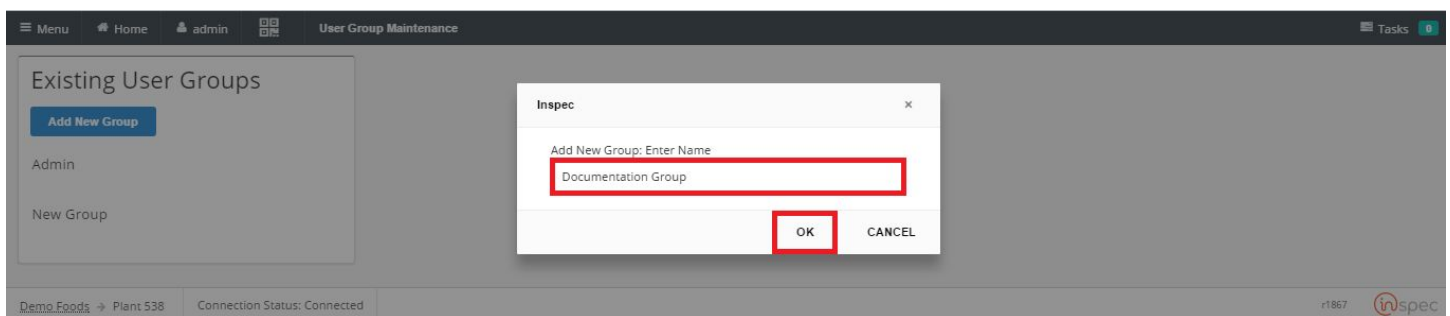
How to Add a new Group and assign Roles and Users to a Group

To create a new group,

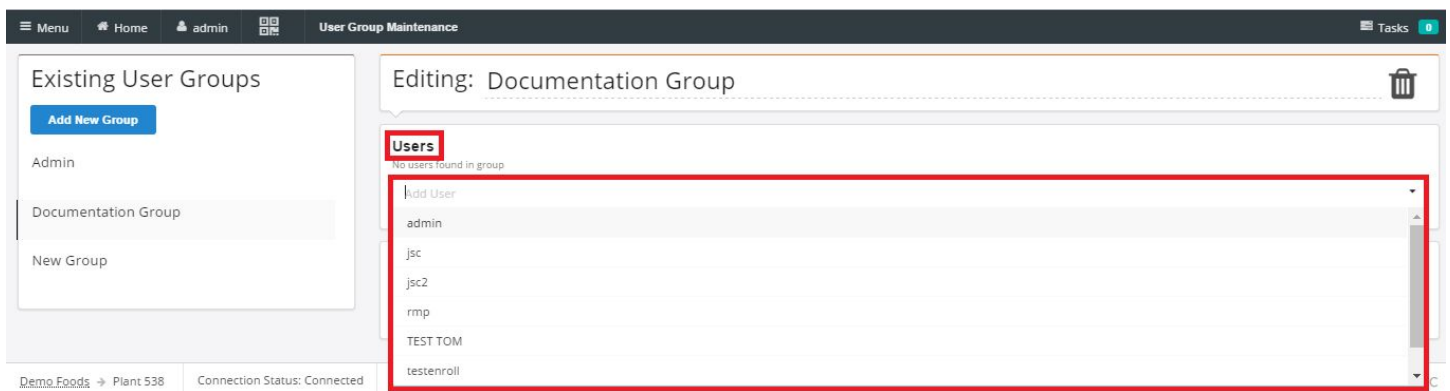
Select <Add New Group>

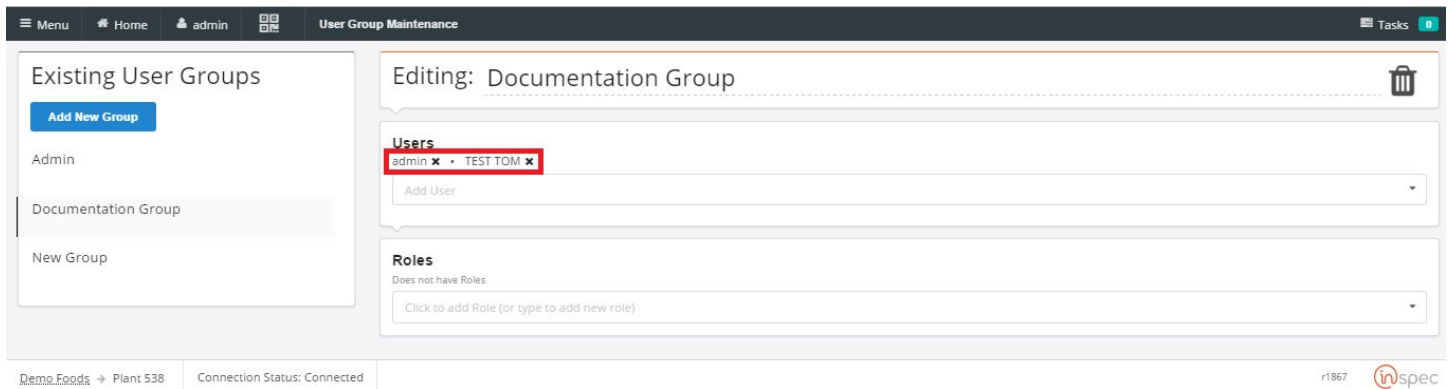


Enter a group name, and select <OK>.

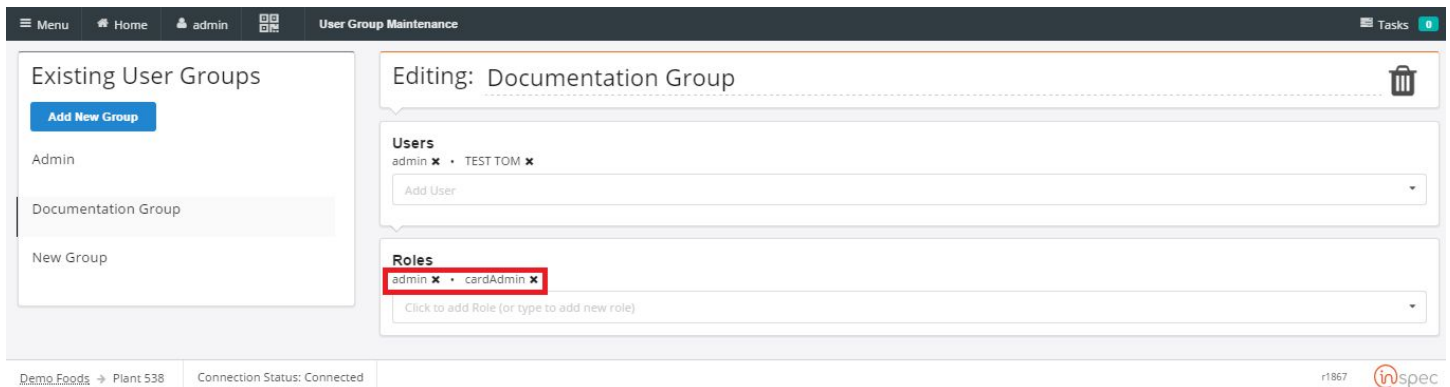
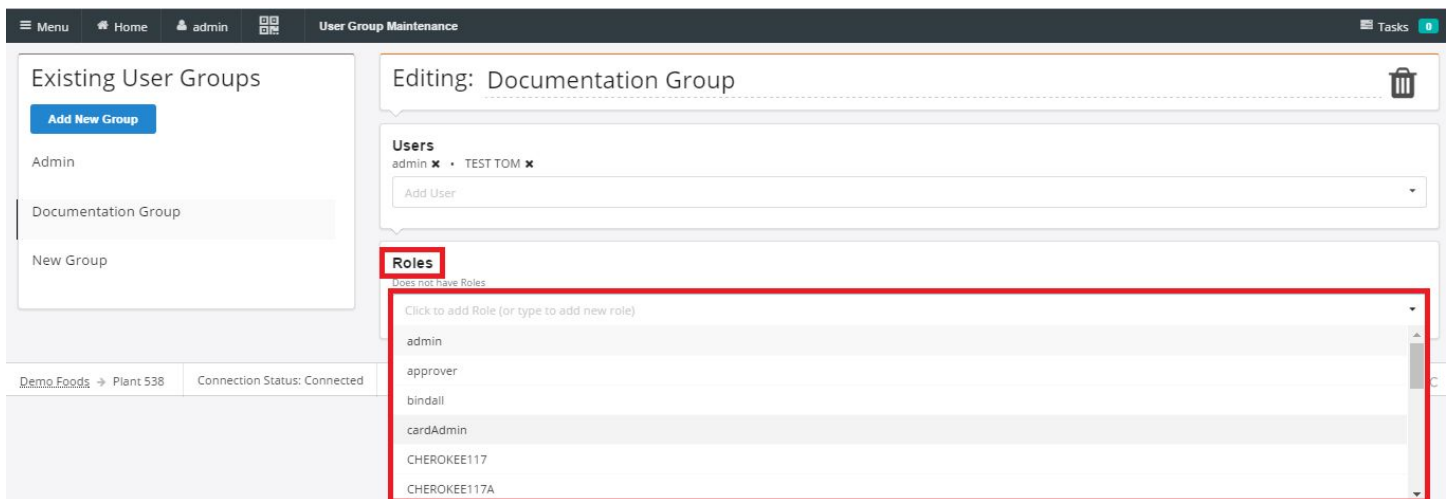


To complete the group, add users to the group via the “Users” drop-down.





Then, add roles via the “Roles” to the chosen users.



Deleting and editing existing groups can also be completed in the group management screen. To delete existing groups, perform all the step listed above to get to the group management screen and to access an existing group.

How to Edit a Group

Once in the groups screen, the user can select an existing group by selecting the name of the desired existing group.

Now the user will be brought to the group editing screen.

Menu Home admin User Group Maintenance Tasks

Existing User Groups

Add New Group

Admin

Documentation Group

New Group

Editing: Documentation Group

Users

No users found in group

Add User

Roles

Does not have Roles

Click to add Role (or type to add new role)

Demo Foods -> Plant 538 Connection Status: Connected r1867 inspec

To edit the form name, users, or roles toggle the drop-down menu or edit the group name.

The figure shows the drop-down menus that allow the user to edit the users of the group and the roles assigned to those users.

Menu Home admin User Group Maintenance Tasks

Existing User Groups

Add New Group

Admin

Documentation Group

New Group

Editing: Documentation Group

Users

admin x • TEST TOM x

Add User

Roles

admin x • cardAdmin x

Click to add Role (or type to add new role)

Demo Foods -> Plant 538 Connection Status: Connected r1867 inspec

This figure shows the field that the group's name will appear to be edited in. To edit the name, select the field, highlight the name and write over the existing name with the name desired.

Menu Home admin User Group Maintenance Tasks

Existing User Groups

Add New Group

Admin

Documentation Group

New Group

Editing: Documentation Group

Users

admin x • TEST TOM x

Add User

Roles

admin x • cardAdmin x

Click to add Role (or type to add new role)


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How to Delete a Group

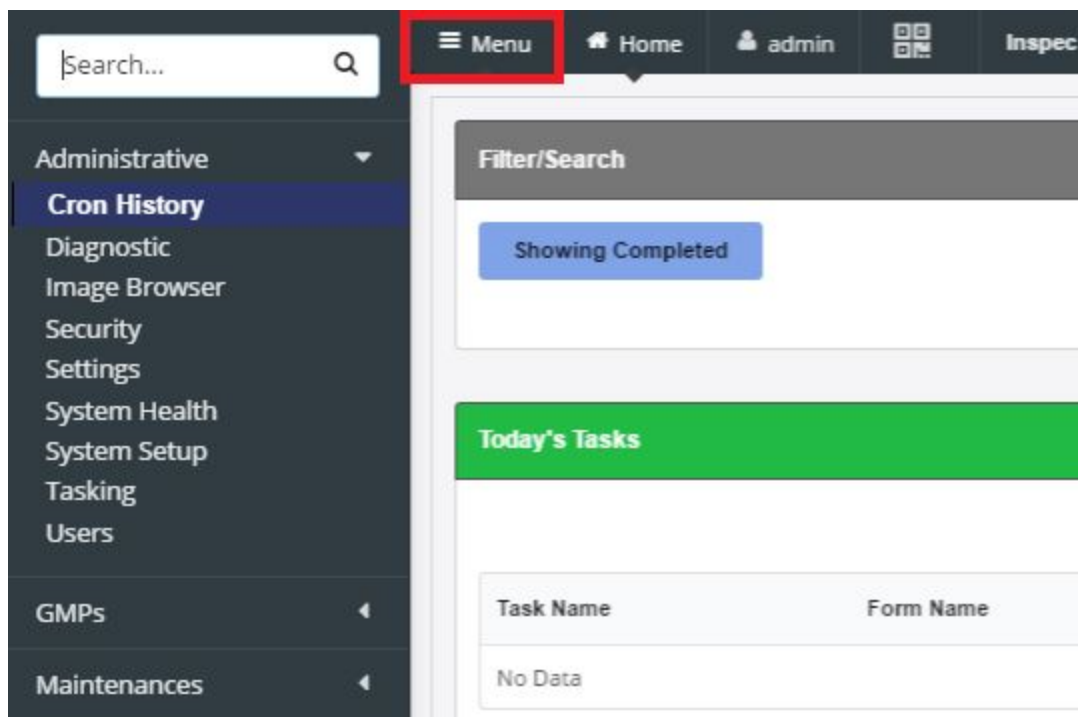
To delete the group select the trash can icon that appears in the editing screen.

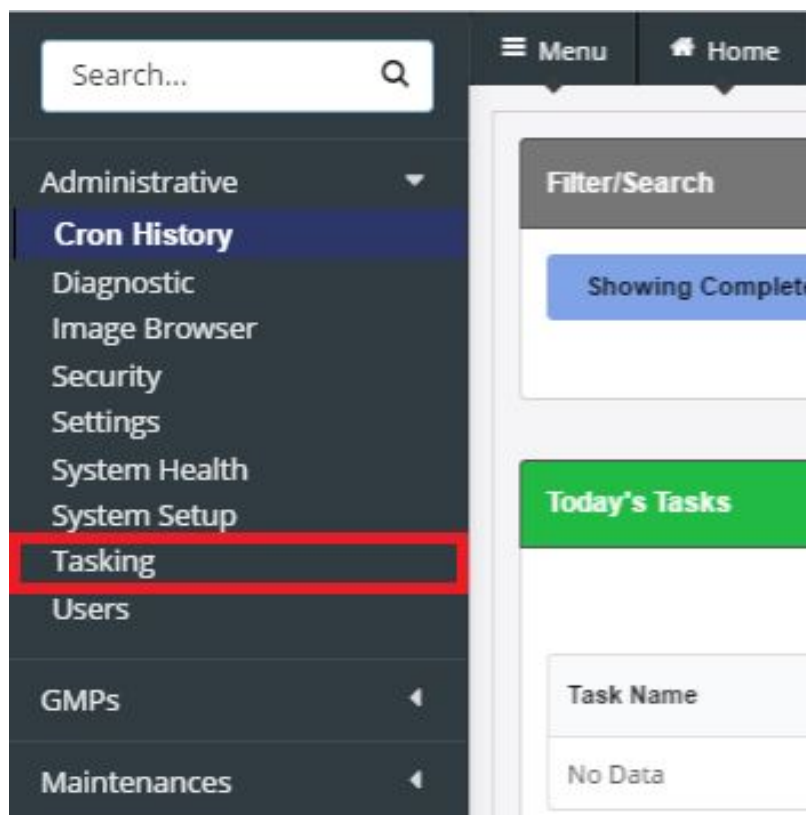
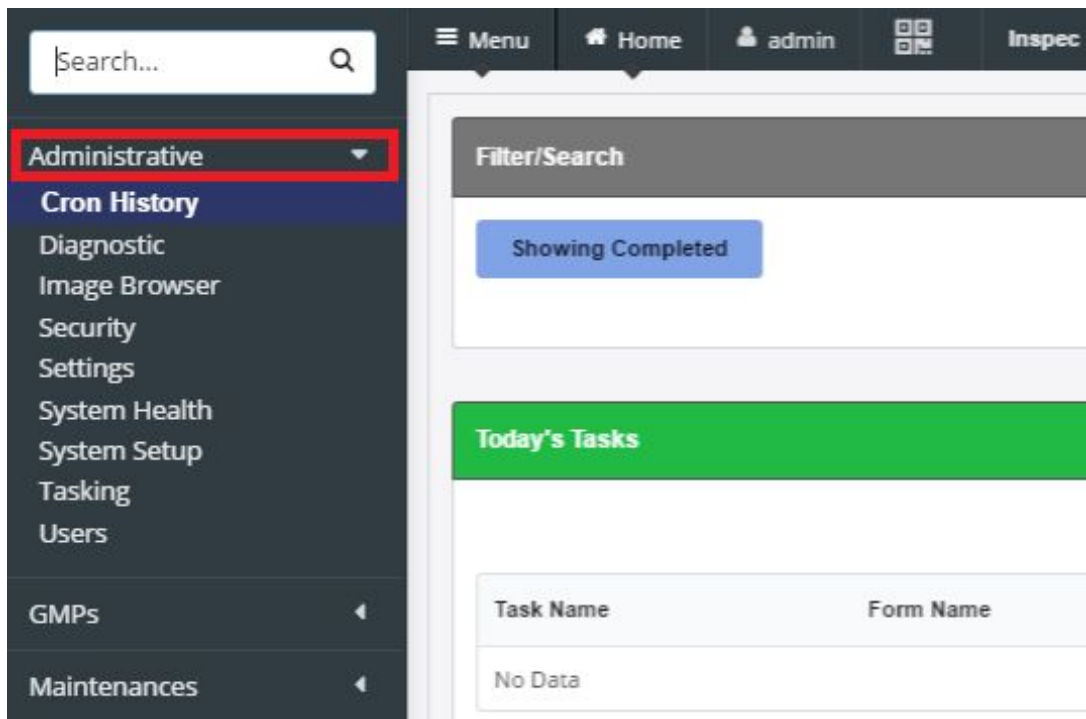
The screenshot displays the 'User Group Maintenance' interface. On the left, a sidebar titled 'Existing User Groups' contains a blue 'Add New Group' button and a list of groups: 'Admin', 'Documentation Group' (highlighted), and 'New Group'. The main area is titled 'Editing: Documentation Group' and features a trash can icon in the top right corner, which is highlighted with a red box. Below the title, there are two sections: 'Users' and 'Roles'. The 'Users' section shows 'admin x' and 'TEST TOM x' with an 'Add User' button. The 'Roles' section shows 'admin x' and 'cardAdmin x' with a button that says 'Click to add Role (or type to add new role)'. The bottom of the interface includes a footer with 'Demo Foods → Plant 538', 'Connection Status: Connected', 'r1867', and the 'inspec' logo.

Tasking Management

 Role Permissions Needed	
Role Value	Role Name
formAdmin	Form Administrator

To get to the user context maintenance select the <Menu> slide-out. Select the <Administrative> drop-down and select <Tasking>.





Create Task

Task Type
 Recurring Single

Assign To
 Person Group

Person
 [Dropdown]

Form
 [Dropdown]

Task Name
 [Text Field]

Start Time
 2017-04-07 13:25:31

Time To Complete Form
 60 minutes

SAVE

Scheduled Tasks

Task History

Show 25 rows per page

Task Name	Form Name	Status	Expiration Time	Assigned To
No Data				

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To create a task,

Select the task type with either <Recurring> or <Single> actions.

“Recurring” will make the task repetitive on a scale set by the user in the screen prompted after selecting “Recurring”.

Create Task

Task Type
 Recurring Single

Assign To
 Person Group

Person
 [Dropdown]

Form
 [Dropdown]

Task Name
 [Text Field]

Start Time
 2017-04-07 13:25:31

End Time
 2017-05-07 13:25:30

Frequency
 60 minutes

Time To Complete Form
 60 minutes

Scheduled Task Actions

Action Event + Add

Scheduled Task Exceptions

Exclude Day

Sun	Mon	Tue	Wed	Thu	Fri	Sat

Specific Time Exceptions
 None configured

From Time To Time Day

Exception Description + Add

Scheduled Tasks

Task History

Show 25 rows per page

Task Name	Form Name	Status	Expiration Time	Assigned To
No Data				

“Single” will make the task a one time only function that occurs when the user sets it to.

Next, Select who to assign the task to with either the <person> or <Group> actions.

“Person” will present a “Person” drop-down menu that will prompt the user to select the name of a user for the task to be assigned to.

“Group” will present a drop-down menu for the user to choose the group to assign the task to. Selecting “group” will also populate a “Task Copy” button-bar, with the actions of <Shared Copy> or <Per User Copy>.

The screenshot shows the 'Create Task' form in a web application. The 'Task Type' is set to 'Single'. Under 'Assign To', 'Group' is selected. In the 'Task Copy' section, 'Shared Copy' is highlighted with a red box. The 'Task Name' field is empty. 'Start Time' is set to '2017-04-07 13:25:31'. 'Time To Complete Form' is set to '60' minutes. The 'Groups' and 'Form' dropdowns are empty. A 'SAVE' button is at the bottom left. To the right, the 'Scheduled Tasks' section shows a 'Task History' table with columns: Task Name, Form Name, Status, Expiration Time, and Assigned To. The table currently shows 'No Data'. The bottom status bar indicates 'Demo Foods -> Plant 538' and 'Connection Status: Connected'.

Selecting “Shared Copy” will create one task screen for every user in the group to work in.

This screenshot is identical to the previous one, but in the 'Task Copy' section, 'Per User Copy' is now highlighted with a red box, indicating it has been selected. All other form fields and the 'Scheduled Tasks' section remain the same.

Selecting “Per User Copy” will distribute a copy of the task to every user in the group to work on individually.

This screenshot is identical to the previous one, but in the 'Form' dropdown menu under the 'Groups' section, a specific form name is now visible and highlighted with a red box. This indicates the user has selected a form to complete the task. All other form fields and the 'Scheduled Tasks' section remain the same.

Select the form the user wishes to complete with the task, using the “form” drop-down.

Create Task

Task Type
 Recurring ☐ Single ☒

Assign To
 Person ☐ Group ☒

Task Copy
 Shared Copy ☐ Per User Copy ☒

Groups

Form

 486
 500
 522
 533
 540

Task Name

Start Time
 2017-04-07 13:25:31

Time To Complete Form
 60 minutes

Scheduled Tasks

Task History

Show 25 rows per page

Task Name	Form Name	Status	Expiration Time	Assigned To
No Data				

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Name the task in the “task name” field.

Create Task

Task Type
 Recurring ☐ Single ☒

Assign To
 Person ☐ Group ☒

Task Copy
 Shared Copy ☐ Per User Copy ☒

Groups

Form

 486
 500
 522
 533
 540

Task Name

Start Time
 2017-04-07 13:25:31

Time To Complete Form
 60 minutes

Scheduled Tasks

Task History

Show 25 rows per page

Task Name	Form Name	Status	Expiration Time	Assigned To
No Data				

SAVE

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Select a start time with the “date and time” field.

Create Task

Task Type
 Recurring ☐ Single ☒

Assign To
 Person ☐ Group ☒

Task Copy
 Shared Copy ☐ Per User Copy ☒

Groups

Form

 486
 500
 522
 533
 540

Task Name

Start Time
 2017-04-07 13:25:31

Time To Complete Form
 60 minutes

Scheduled Tasks

Task History

Show 25 rows per page

Task Name	Form Name	Status	Expiration Time	Assigned To
No Data				

SAVE

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Select an amount of time you with the form to be completed in, for the users.

Menu
Home
admin
Tasking
Tasks

Create Task

Task Type
Recurring
Single

Assign To
Person
Group

Task Copy
Shared Copy
Per User Copy

Groups

Form

SAVE

Task Name

Start Time
2017-04-07 13:25:31

Time To Complete Form
60
minutes
minutes
hours
days
weeks

Scheduled Tasks

Task History

Show 25 rows per page

Task Name	Form Name	Status	Expiration Time	Assigned To
No Data				

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Lastly, save the task to complete tasking.

Menu
Home
admin
Tasking
Tasks

Create Task

Task Type
Recurring
Single

Assign To
Person
Group

Task Copy
Shared Copy
Per User Copy

Groups

Form

SAVE

Task Name

Start Time
2017-04-07 13:25:31

Time To Complete Form
60
minutes

Scheduled Tasks

Task History

Show 25 rows per page

Task Name	Form Name	Status	Expiration Time	Assigned To
No Data				

Demo Foods → Plant 538
Connection Status: Connected
r1872
inspec