



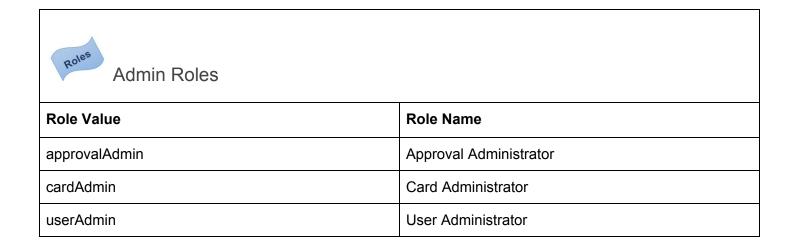
# Inspec User Guide

ver. 2018-Apr

# **User Administration**

## **Role Management**

Role <sup>5</sup> System Roles	
Role Value	Role Name
diagnostics	Diagnostics
bindall	Binball
systemAdmin	System Administrator



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

Role <sup>5</sup> 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		C Restore Defaults
All Users	▼ All Role	s •
Context Control Legend Enable to have system convert datetime Context Setup Select the context components to use Create Tables Automatically	e2 to datetime	
Cron History Purge Days Number of days to retain cron history e	entries	
Custom Colors User-defined colors		
Default <mark>AD</mark> DNS List of default DNS domains (@example	e1.com, @example2.cor	n)
Default AD Domain List of default AD domains (DOMAIN1, I		

#### Environment Settings:

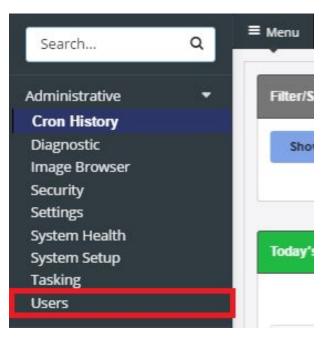
- Idap\_servername
- Idap\_extended

## 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.

Add/Edit User Username	Full Na	me	Email		Passw	ord			Bulk
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									Show <b>25 →</b> rows per page   ( ← 1
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sc	Jack	jsc@coolearth.com		Edit User Remove	Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk	
502	Jack ColemanOther	jsc2@mail.com		Edit User Remove	Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk	
mp	Ryan	rmp@coolearth.com		Edit User Remove	Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk	
EST TOM	TEST TOM JOE	ZIPPY@ZIPPY.COM		Edit User Remove	Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk	
estenroll	testenroll	rmp+123@coolearth.com		Edit User Remove	Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk	
nited7221	United Creations	it@unitedcreations.com		Edit User Remove	Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk	

#### 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.

Add/Edit User Username		Full Na	me	Ema	il	Passv	vord			Bulk	
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										Show 25 🕶 rows per page 🤘 🔶 1	÷
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c	2	Q		Q							
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sc2	Jack ColemanOther		jsc2@mail.com		Edit User Rei	Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk		
mp	Ryan		rmp@coolearth.com		Edit User Ret	move Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk		
TEST TOM	TEST TOM JOE		ZIPPY@ZIPPY.COM		Edit User Ret	Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk		
estenroll	testenroll		rmp+123@coolearth.com		Edit User Ret	move Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk		
united7221	United Creations		it@unitedcreations.com		Edit User Rer	move Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk		

	Assign order): the context to use from the dropdown below, and one or more users by x for that user. Then press the button for the desired activity.	Add Users To Context Re	emove Users From Context	Reset To Default		
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					Show 25 🕶 rows per page 🛛 🤟 🔶 1	÷
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Clear			Q			
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	jsc		Demo Food	s > HQ		
	jsc2		Q Demo Fo	ods		
	rmp		Demo Food	s 🔶 Plant 538		
	TEST TOM		Demo Food	s → HQ		
	testenroll		Demo Food	s $\Rightarrow$ Plant 538		
	united7221		United Crea	tions > UC1		

≣ Menu 🛛 🖨 Home	admin OC User Maintenance	🗐 🗷 Tasks
Edit User Maintenance	e 😤 Editing User Context Maintenance 🖾 Edit User Enrollm	C Edit Kiosks
	Assign rdery: the context to use from the dropdown below, and one or more user (for that user. Then press the button for the desired activity.	Add Users To Context Remove Users From Context Reset To Default
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	rmp	Demo Foods 🔶 Plant 538
≤	TEST TOM	Demo Foods → HQ
	testenroll	Demo Foods

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Edit User Maintenance	📽 Edit User	Context Maintenance Editing Use	er Enrollment 🖵 E	dit Kiosks			
ser Enrollment							
V E-Mail List							
Example: user1@inspec.co	om, user2@insp	ec.com					
Send Enroliment Emails							
	_					Show 25 🕶 rows per page 🛛 H 🛛 🔶 1	÷
Jsername		Full Name		Email			
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sc		Jack		jsc@coolearth.com		Send Enrollment Email	
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mp		Ryan		rmp@coolearth.com		Send Enrollment Email	
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united7221		United Creations		it@unitedcreations.com		Send Enrollment Email	

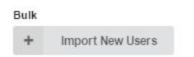
Demo Foods 
> Plant 538 Connection Status: Connected

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ser Enrollment						
/ E-Mail List						
xample: user1@inspec.co	m, user2@insp	ec.com				
Send Enrollment Emails						
	_					Show 25 - rows per page 🔣 🔶 1 🌛
sername		Full Name		Email		
	Q		۹		Q	
c		Jack		jsc@coolearth.com		Send Enrollment Email
c2		Jack ColemanOther		jsc2@mail.com		Send Enrollment Email
q		Ryan		rmp@coolearth.com		Send Enrollment Email
STTOM		TEST TOM JOE		ZIPPY@ZIPPY.COM	[	Send Enrollment Email
stenroll		testenroll		rmp+123@coolearth.com		Send Enrollment Email
		United Creations		it@unitedcreations.com		Send Enrollment Email

Edit User Maintenance 🛛 📽	Edit User Context Maintenance Se Ed	lit User Enrollment 🖵 Editing Kic	sks			
Logged Out Kiosks						l
Device ID						
Device ID			IP	Last Seen		
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71ef94c6-7cf6-4d8f-9f77-e342b16b	00b5d		172.17.0.3	8 days ago	Login In Kiosk	
Active Kiosks & De	vices					(
Device ID			IP	Last Seen	Klosk User	
907431aa-ee4f-49d6-bbb4-cdf288a	a2692c		172.17.0.3	6 days ago	(N/A)	
2c13786-6c65-4952-8ae2-0dbac7	23a2c8		172.17.0.3	4 days ago	(N/A)	
eeec9bf-7fee-4f92-98c9-38641af5	52444		172.17.0.3	32 minutes ago	(N/A)	
Recent Authenticat	ion Requests					
Device ID	Seen	Token	Kiosk Binding	ı	User Binding	

# Add a list of Users via the Import process

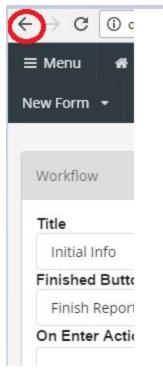


### How to Configure a User

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.

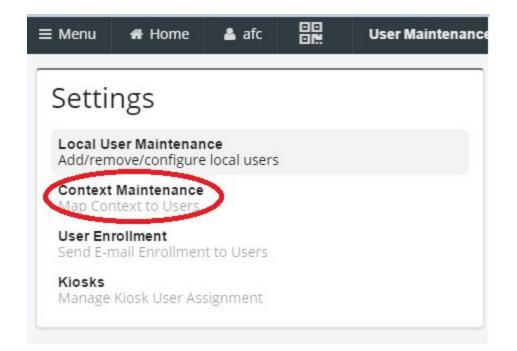
In addition, you need to set the role to be "User". In the Roles & Role Groups section, select "User" from the dropdown, or type it in and press the Add Role button.

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.

Settings		Select Context   Add Users To Context Remove Users From Context Primary Cont						
Local User Ma Add/remove/co Context Maint Map Context to	enfigure local users	User Name	Primary Context	Additional Contexts				
User Enrollment Send E-mail Enrollment to Users		Q. admin	Icicle > Gordon Jensen					
Kiosks Manage Kiosk I	Jser Assignment	ExampleUser						
		qa1 ga2	Icicle ⇒ Gordon Jensen					
		qa3	Icicle					
		qa4	Licicle > Gordon Jensen					
		rebeccak						
Icicle > HQ Icicle	e	ted						

## **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.

Search	Q	-	≡ Menu	Home	🛔 jsc		Inspec									
				•												
Administrative			Filter/Se	earch												
GMPs	•		Show	ving Complet	ad				Simple Tin	14	Full Time			Added	Due Dat	ta
Checklists	•		31104	ang compier	cu				Simple Till	IC	i un rane			Audeu	Due Da	LC .
Machine Equipment Checklists	•															
Machine Calibratio Checklist	n		Today's	Tasks												
Machine Cleaning Checklist																
Machine Settings Checklist																
Personnel	•		Task N	lame		Form N	ame		St	atus		Туре		Start Time		Expiration 1
Checklists			No Da	ta												
Employee Hygiene Checklist																
Employee PPE Checklist																
Sanitation Checklist			Recurn	ing Task Sch	edules											
Product Checklists	-															
Case Label Checklis	t															
Pallet Label Checkli	st		Task N	lame			Fo	rm Name	e				Expiration	n Time		
Workmanship Checklist			No Da	ta												
Site/Building Checklists																
Floor Checklist			Teshall	ana an												
Lighting Checklist		<b>.</b>	Task Hi													
Trach Die Checklict																

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

Search	Q	≡ Menu 🖷 Ho
		Lediting User Ma
Administrative	-	
Cron History		Add/Edit Use
Diagnostic		Username
Image Browser		Doe
Security		
Settings		
System Health		
System Setup		
Tasking		Username
Users		0

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.

	User Maintenance							
Edit User C	ontext Maintenance 🛛 🛎 E	dit User Enrollment	🖵 Edit Kios	ks				
Full N	ame n Doe Email		bassword for us	ser TEST TOM? Note	<ul> <li>This will log out all</li> <li>OK CANCEL</li> </ul>	Save	Show 25 •	Bulk + Import rows per page
Q		Q						
		Edit User	Remove	Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk	
ŧ٢		Edit User	Remove	Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk	
		Edit User	Remove	Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk	

	User Maintenance									
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	jsc@coolearth.com		Edit User	Remove	Reset Password	Send E	nrollment Email	Change Context/Roles	Make Kiosk	
er	jsc2@mail.com		Edit User	Remove	Reset Password	Send E	inrollment Email	Change Context/Roles	Make Kiosk	

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

## **User Context Maintenance**

Role Permissions Needed							
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	۹	≡ Menu	A Home	🌡 admin		Inspec
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GMPs	4	Task	Name		Form Name	•
Maintenances	4	No Da	ata			

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Cron History Diagnostic Image Browser Security Settings System Health System Setup Tasking Users		Shov	ving Complet	ed		
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ic	Jack	jsc@coolearth.com		Edit User Remov	e Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk	
c2	Jack ColemanOther	jsc2@mail.com		Edit User Remov	e Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk	
np	Ryan	rmp@coolearth.com		Edit User Remov	e Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk	
EST TOM	TEST TOM JOE	ZIPPY@ZIPPY.COM		Edit User Remov	e Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk	
stenroll	testenroll	rmp+123@coolearth.com		Edit User Remov	e Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk	
nited7221	United Creations	it@unitedcreations.com		Edit User Remov	e Reset Password	Send Enrollment Email	Change Context/Roles	Make Kiosk	

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

≡ Menu	# Home 🛔 admin 📴 User Maintenance						l	🖌 🖻 Tas	ks 🚺
🛔 Edit User	Maintenance de Editing User Context Maintenance	Edit User Enrollmen	nt 🖵 Edit Kiosks						
Need to se	ontext To Assign lect (in any order): the context to use from the dropdown be s by clicking on the checkbox for that user. Then press the b ontext	low, and one or	Add Users To Context	Remove Users From Context	Primary Context	Reset To Default			
						Show 25 👻 rows per pag	e 14 🔶	1 >	н
Select User	User Name	Primary Context		Additional Contexts					
Clear	Q								Q
	admin	Demo Foods → Plant 5	538						
	jsc								
0	jsc2								
<b>~</b>	rmp	Q 419							
0	TEST TOM								
	testenroll								
	united7221	United Creations	21						

Select context to assign in the drop-down submenu.

≡ Menu	# Home 🛔 admin 🛄 User Maintenance	🧾 🛢 Tasks 🧕
🛔 Edit User	Maintenance Beliting User Context Maintenance	S Edit User Enrollment 🛛 🖵 Edit Klosks
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	jsc	Plant 538
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~	rmp	0.419
	TEST TOM	
	testenroll	
	united7221	United Creations

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 III User Maintenance							2	Tasks	s 🚺
🛔 Edit User	Maintenance 🛛 👹 Editing User Context Maintenance	Edit User Enrollment 🖵	Edit Kiosks							
	ontext To Assign lect (in any order): the context to use from the dropdown be	low, and one or	s To Context Re	move Users From Context	Primary Context	Reset To Default				
more users activity.	s by clicking on the checkbox for that user. Then press the b	utton for the desired								
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Select User	User Name	Primary Context		Additional Contexts						
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	admin	Demo Foods → Plant 538								
	jsc									
	jsc2									
	rmp	Q 419								
	TEST TOM									
	testenroll									
	united7221	United Creations								

Adding user(s) to a context.

≡ Menu	希 Home 🔺	admin 🛄	User Maintenance							<b>e</b> 1	🛢 Tasks 🚺
🛔 Edit User	r Maintenance	皆 Editing User C	ontext Maintenance	Edit User Enrollme	ent 🛛 🖵 Edit Kiosks						
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Clear			٩								Q
	admin			Demo Foods → Plant	t 538						
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	jsc2						-				
-	rmp			Demo Foods → Plant	t 538	Q Demo Foods Q 4	19				
	TEST TOM										
	testenroll										
	united7221			United Creations $\rightarrow$ U	UC1						

### Setting primary contexts.

≡ Menu	# Home 🗳 admin	User Maintenance						2	Tasks	
🛔 Edit User	r Maintenance 🛛 🐮 Editing User C	ontext Maintenance	Edit User Enrollm	nent 📮 Edit Kiosks						
Need to se	context To Assign lect (in any order): the context to use f s by clicking on the checkbox for that u	rom the dropdown below ser. Then press the butto	r, and one or in for the desired	Add Users To Context	Remove Users From Context	Primary Context	Reset To Default			
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Select User	User Name	F	Primary Context		Additional Contexts					
Clear		Q								Q
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	jsc2									
-	rmp		Q 419		Demo Foods → Plant 53	8 @ Demo Foods				
	TEST TOM									
	testenroll									
	united7221		United Creations →	UC1						

### Resetting to Default

≡ Menu	Home admin DR User Maintenance			🗐 🛎 Tasks 🚺
🛔 Edit User	Maintenance Editing User Context Maintenance	🛛 Edit User Enrollment 🛛 🖵 Edit Kiosks		
Need to sel more users activity.	ontext To Assign lect (in any order): the context to use from the dropdown bei : by clicking on the checkbox for that user. Then press the bu o Foods	ow, and one or	Remove Users From Context Primary Context	Reset To Default
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Select User	User Name	Primary Context	Additional Contexts	
Clear	٩			٩
	admin	Demo Foods + Plant 538		
	jsc	Demo Foods $\rightarrow$ HQ		
	jsc2	Q Demo Foods		
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	TEST TOM	Demo Foods + HQ		
	testenroll	Demo Foods		
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≡ Menu	# Home & admin III User M	aintenance		🗐 🛢 Tasks 🧕
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	jsc	Demo Foods      HQ		
	jsc2	O Demo Foods		
<b>~</b>	rmp	Demo Foods → Plant 538		
	TEST TOM	Demo Foods → HQ		
	testenroll	Demo Foods		
	united7221	United Creations $\Rightarrow$ UC1		

# User Enrollment Maintenance (ToDo)

Roles Role Permissions Needed					
Role Value	Role Name				
userAdmin	User Administrator				

## Kiosk Management (ToDo LAST)

## **Group Management**

Users

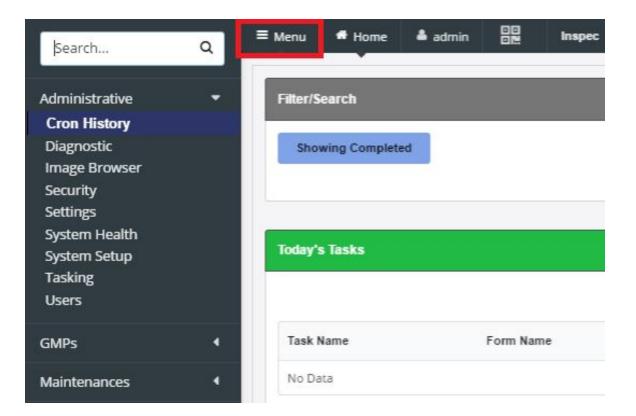
Role <sup>5</sup> Role Permissions Needed					
Role Value	Role Name				
cardAdmin	Card Administrator				
formAdmin	Form Administrator				
menuAdmin	Menu Administrator				
dataAdmin	Data Administrator				
deleteAdmin	Delete Administrator				

### Other Roles:

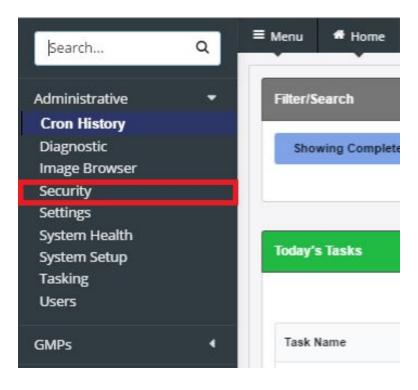
- User (Default)
  - $\circ$  reopen forms
- Global Sticky Role (Thumb-tack feature)
- Reopen Forms Role (make this a super-cede to the "reopen forms" role.)
- Approval Role (make this a super-cede to the "approver" role.)

See the "Security Window"

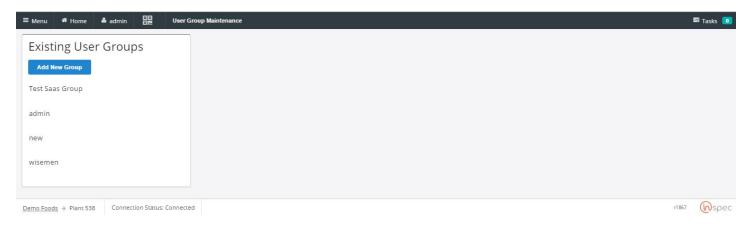
To get to the user context maintenance select the <Menu> slide-out. Select the <Administrative> drop-down and select <Security>.



Search	٩	≡ Menu	# Home	🌢 admin		Inspec
Administrative Cron History Diagnostic Image Browser Security Settings System Health System Setup Tasking Users		Sho	Search owing Complet 's Tasks	ed		
GMPs	•	Task	Name		Form Name	•
Maintenances	4	No D	ata			



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: <u>http://qcproduction.coolearth.com/qc/review</u>)

## 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>

≡ Menu # Home	admin 🛄 Us	ser Group Maintenance		🛢 Tasks 🚺
Existing User	Groups			
Add New Group				
Test Saas Group				
admin				
new				
wisemen				
Demo Foods	Connection Status: Conn	ected	r1867	Spec

#### Enter a group name, and select <OK>.

Menu     Home     admin     User Group Maintenance       Existing User Groups     Add New Group       Addmin       New Group	Add New Group: Enter Name Documentation Group OK CANCEL	■ Tasks 💿
Demo Foods   Plant 538 Connection Status: Connected		rt867 WSpec

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

≡ Menu 🕷 Home 🌢 admin 📴 User Group	Maintenance	🛢 Tasks 🚺
Existing User Groups	Editing: Documentation Group	Ŵ
Add New Group	Users No users found in group	
Documentation Group	Ndd User admin	•
New Group	jsc.	
	rmp TEST TOM	- 1
Demo Foods  + Plant 538 Connection Status: Connected	testenroll	•

≡ Menu 🖷 Home 🎍 admin 🛄 User	Group Maintenance	🖺 Tasks 🚺
Existing User Groups	Editing: Documentation Group	ŵ
Admin	Users admin × · TEST TOM × Add User	-
Documentation Group		
New Group	Roles Does not have Roles	
	Click to add Role (or type to add new role)	•
Demo Foods   Plant 538 Connection Status: Connect	ed	r1867 🕠 spec

Then, add roles via the "Roles" to the chosen users.

≡ Menu 👫 Home 🍐 admin 📴	User Group Maintenance	≌ <sub>Tasks</sub>
Existing User Groups	Editing: Documentation Group	Û
Add New Group	Users admin × • TEST TOM ×	
Documentation Group	Add User	•
New Group	Roles Dee not have Roles	
	Click to add Role (or type to add new role)	-
	admin	
emo Foods -> Plant 538 Connection Status: Co	approver	
	bindall	
	cardAdmin	
	CHEROKEE117	
	CHEROKEE117A	

≡ Menu	admin 📴 User Grou	ip Maintenance	🛱 Tasks 🧕
Existing User Groups	Groups	Editing: Documentation Group	Û
Add New Group		Users admin × • TEST TOM ×	
Documentation Group		Add User	·
New Group		Roles admin x • cardAdmin x	
		Click to add Role (or type to add new role)	•
Demo Foods → Plant 538	Connection Status: Connected		r1867 🔞 spec

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.

Existing User Groups	Editing: Documentation Group	
Add New Group		
Admin	Users No users found in group	
Documentation Group	Add User	1-
occanicitation croup		
New Group	Roles Does not have Roles	
	Click to add Role (or type to add new role)	

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 Grou	p Maintenance	🖺 Tasks 🚺
Existing User	Groups	Editing: Documentation Group	Û
Admin		Users admin × • TEST TOM ×	
Documentation Group	i.	Add User	•
New Group		Roles admin × • cardAdmin ×	
		Click to add Role (or type to add new role)	
Demo Foods  → Plant 538	Connection Status: Connected		r1867 (i)spec

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 Grou	p Maintenance	🛎 Tasks 🚺
Existing User	Groups	Editing: Documentation Group	Û
Add New Group		Users admin × • TEST TOM ×	
Documentation Group		Add User	
New Group		Roles admin × · cardAdmin ×	
		Click to add Role (or type to add new role)	
Demo Foods → Plant 538	Connection Status: Connected	*186	7 🔞 spec

#### How to Delete a Group

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

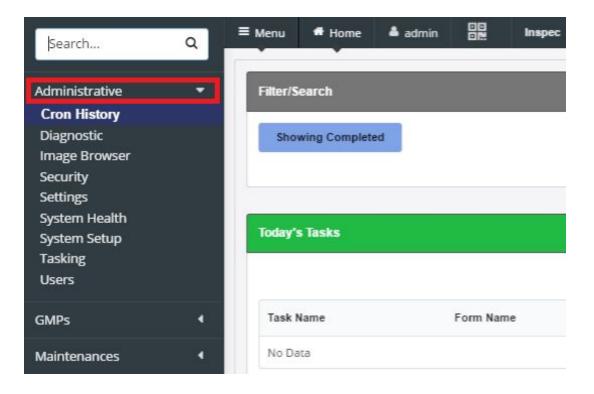
≡ Menu	admin 🛄 User Grou	p Maintenance	≅ Tasks 🚺
Existing User	Groups	Editing: Documentation Group	<b>D</b>
Add New Group		Users admin x • TEST TOM x	
Documentation Group		Add User	
New Group		Roles admin × · cardAdmin ×	
		Click to add Role (or type to add new role)	
Demo Foods → Plant 538	Connection Status: Connected		r1867 🕡spec

# **Tasking Management**

Role <sup>5</sup> Role Permiss	sions 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>.

Search	۹	≡ Menu	A Home	🌢 admin		Inspec
Administrative Cron History Diagnostic Image Browser Security Settings System Health System Setup Tasking Users	•	Sho	Search wing Complete s Tasks	ed		
GMPs	•	Task	Name		Form Name	
Maintenances	4	No D	ata			



Search	۹	≡ Menu	ff Home
Administrative	÷	Filter/S	earch
Cron History Diagnostic Image Browser Security Settings		Shor	wing Complete
System Health System Setup Tasking Users	_	Today's	s Tasks
GMPs	4	Task I	Name
Maintenances	4	No Da	ita

≡ Menu 希 Home 🌢 admin 🛄 Taskir	ng	E Tasks
Create Task		Scheduled Tasks
Task Type Recurring Single	Task Name	Task History
Assign To Person Group	Start Time	Show 25 🕶 rows per page 🛛 K 🔶 🔶 M
Person	Time To Complete Form	Task Name Form Name Status Expiration Time Assigned To
Form		No Data
SAVE 🥝		
Demo Foods → Plant 538 Connection Status: Connect	ed	r1872 (inspec

To create a task,

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

"Recurring" will make the task repetative on a scale set by the user in the screen prompted after selecting "Recurring".

reate Task				Scheduled <sup>-</sup>	Tasks			
ask Type	Task Name			Task History				
Recurring Single								
Person Group	Start Time						Show 25 *	rows per page 😠 🔶 🔶
erson	2017-04-07 13:25:31		m	Task Name	Form Name	Status	Expiration Time	Assigned To
61301	* 2017-05-07 13:25:30		-		Form Name	Status	Expiration rime	Assigned to
orm	Frequency		<u> </u>	No Data				
	* 60	minutes *						
	Time To Complete	Form						
N	60	minutes *	Θ					
			Θ					
Action Event	60	minutes *	8					
Action Event	60	minutes *						
Action Event	60	minutes *						
* Scheduled Task Exceptions Exclude Day	-	minutes -	Θ					
Action Event Scheduled Task Exceptions Exclude Day Sun Mon Tue Specific Time Exceptions	60 • Wed Thu	minutes -	Θ					

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

Task Name	Task History
Start Time	Show 25 🔹 rows per page 🛛 🤘 🔶 🤿
Time To Complete Form	Task Name Form Name Status Expiration Time Assigned To
	No Data
	Start Time 2017-04-07 13:25:31

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

reate Task		Scheduled Tasks
ask Type Recurring Single	Task Name	Task History
Person Group	Start Time 2017-04-07 13:25:31	Show 25 👻 rows per page 🛛 H 🛛 🔶 🔿
erson	Time To Complete Form	Task Name Form Name Status Expiration Time Assigned To
orm	▼ 60 minutes ▼	No Data

"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.

reate Task			Scheduled	Tasks			
Recurring Single	Task Name		Task History				(
Assign To	Start Time					Show 25 👻 rows per page	H & > H
Person Group	2017-04-07 13:25:31	<u></u>				1 10	
erson	Time To Complete Form		Task Name	Form Name	Status	Expiration Time	Assigned To
	▼ 60 minutes ▼		No Data				
admin	A						
jsc							
rmp							
TEST TOM							
jsc2							

"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>.

eate Task			Scheduled	Tasks				
sk Type Recurring Single	Task Name		Task History					
ssign To	Start Time					Show <b>25 ▼</b> rows per page	H & .	÷
Person Group sk Copy	2017-04-07 13:25:31 Time To Complete Form	m	Task Name	Form Name	Status	Expiration Time	Assigned To	
Shared Copy Per User Copy OUDS		minutes 🔻	No Data					
orm								
SAVE 🥹								

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

≡ Menu 🖷 Home 🌡	admin 📴 Tasking					8	🖻 Tasks 🚺
Create Task			Scheduled	Tasks			
Task Type Recurring Single		Task Name	Task History				Θ
Assign To Person Group		Start Time 2017-04-07 13:25:31			Show 25 👻 rows per pag	e  4 -	→ H
Task Copy		2017-04-07 13:25:31	Task Name	Form Name	Status Expiration Time	Assigned To	
Shared Copy Per Groups	r User Copy	60 minutes 👻	No Data				
Form	*						
SAVE 🥝							
Demo Foods → Plant 538	Connection Status: Connected					r1872	(inspec

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

Create Task			Scheduled Tasks
Task Type Recurring Single		Task Name	Task History
Assign To Person Group		Start Time 2017-04-07 13:25:31	Show 25 🕶 rows per page 🛛 🤘 🔶 🔅
Task Copy Shared Copy Groups Form	• User Copy •	Time To Complete Form 60 minutes *	Task Name         Form Name         Status         Expiration Time         Assigned To           No Data
JANE -			

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

≡ Menu 希 Home 🌢 admin 💷 Tasking			2	🛎 Tasks 🚺
Create Task		Scheduled Tasks		
Task Type Recurring Single	Task Name	Tesk History		Θ
Assign To Person Group	Start Time	Show <b>25 •</b> rows per page	< *	⇒ H
Task Copy	Time To Complete Form	Task Name Form Name Status Expiration Time As	ssigned To	
Shared Copy Per User Copy Groups	60 minutes *	No Data		
Form	ľ.			
485				
486				
500				
522 Der 533			r1872	(inspec
540 🗸				

Name the task in the "task name" field.

eate Task		Scheduled Tasks
Recurring Single	Task Name	Task History
Recurring Single ssign To Person Group	1 Start Time 2017-04-07 13:25:31	Show 25 🕶 rows per page 🔣 🔶 🤟
ask Copy	Time To Complete Form	Task Name Form Name Status Expiration Time Assigned To
Shared Copy Per User Copy roups	60 minutes *	No Data
orm	3 	
	ž	
SAVE 🥝		

Select a start time with the "date and time" field.

reate Task		Scheduled Tasks
Task Type Recurring Single	Task Name	Task History
Assign To Person Group	Start Time 2017-04-07 13:25:31	Show 25 👻 rows per page 🛛 H 🛛 🔶 🖒 H
Fask Copy         Per User Copy           Shared Copy         Per User Copy           Groups         Stroups	April 2017 Sun Mon Tue Wed Thu Fri Sat	Task Name         Form Name         Status         Expiration Time         Assigned To           No Data
orm	<ul> <li>2 3 4 5 8 7 8</li> <li>9 10 11 12 13 14 15</li> <li>18 17 18 19 20 21 22</li> <li>23 24 25 28 27 28 29</li> </ul>	
SAVE 🥝	30 [Midnight • ]: 00 • ]	

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

reate Task			Schedule	d Tasks			
ask Type Recurring Single	Task Name		Task History				
Person Group	Start Time	-21				Show 25 🔹 rows per page	H & >
ask Copy	Time To Comp		Task Name	Form Name	Status	Expiration Time	Assigned To
Shared Copy Per User Copy	60	minutes 👻	No Data				
roups	•	minutes					
orm		hours					
	*	days					
		weeks					
SAVE 🥹							

Lasty, save the task to complete tasking.

Task Type   Recurring   Single   Assign To   Person   Start Time   2017-04-07 13:25:31   Task Copy   Shared Copy   Per User Copy   60   minutes *     Form     *     Task Name     Task Name     Form     *     *     Task Name     *     Task Name     Form     *<	
Assign To Person Group Task Copy Shared Copy Per User Copy Go minutes Form	
Task Copy     Time To Complete Form       Shared Copy     Per User Copy       60     minutes *	
Groups Form	ed To
Form	
save 📀	

## UAT (User Acceptable Testing) Management

Role Permiss	ions Needed
Role Value	Role Name
uatAdmin	UAT Administrator

This functionality allows for the User to test a given Inspec build for acceptable use. By testing a set of common data collection forms, the user can note any odd or unexpected behavior while simulating data collection.

To get to the UAT testing page in Inspec, select the <Menu> slide-out. Select the <Administrative> drop-down and select <UAT>. Make sure the uatAdmin permission is enabled for the user attempting to access the UAT menu.

≡ Menu	MC 1	🖀 Home		UAT	l Tests			棗	🛢 Tasks	
						UAT				
	[				_					
	Revision	Ref ID	Date	User	State	Action	 Status			
	< >	•					Start Ne	ew Test		

Select the <Start New Test> button, this will populate a list of the 10 most used forms for your installation.

≡ Menu	MC 1	🕯 Home		UA <sup>.</sup>	T Tests			<del>Й</del>	🕿 Tasks 🛛 🗕	
						UAT				
	Revision	Ref ID	Date	User	State	Action	St	atus		
	< >						s	Start New Test		

After the list has been presented the user can begin to test each form, by selecting <Start Test>, and work through them to determine operability of the specific Inspec build being test.

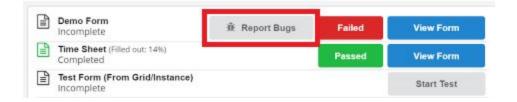
# r2389 UAT Forms

≞	Demo Form Incomplete	View Form
≞	Time Sheet Incomplete	Start Test
Ē	Test Form (From Grid/Instance) Incomplete	Start Test
Ĩ	486 Incomplete	Start Test
Ð	Group Form Test Incomplete	Start Test
Ē	<b>12/29/17-00A</b> Incomplete	Start Test
Ē	SSOP Pre-OP Inspection Form, Salame Line Incomplete	Start Test
Ð	Shop Order Line Assign Incomplete	Start Test
Ē	Test Plan Draft 1 Incomplete	Start Test
Ē	Test Plan Draft 2 Incomplete	Start Test

Inside each form being tested, on the bottom menu a navigation for Pass/Fail is provided. If the form is up to desired operability select <Pass>, if not select <Fail>.

Cart in working or	der?			24-4	btn2		
Yes	No	N/A		3tn1	btn2		
Cart labeled corre	ctly?		Upload Image -5			0	
Yes	No	N/A	Segment	Btn1	btn2		
Cart clean and cle	ar for use?			Test! supr	er long text	Verv	
Yes No N/A			ButtonBar	Btn1		btn2	
			1 2 3 4				
Dropdown			* Long rambling text. Long rambling text.Long ramb				
Select Dropdown		•	Some hint				
Numeric			Pass/Fail				
Numeric		-/+	Pass Fail				
* Quantity							
Quantity		-/+ °F					
← Previous	Or	riginating Form	FINISH REPORT 🤗 Go Back (UAT) Pas	is	Fail		
Demo Foods Pla	ant 538 Co	onnection Status: Connect	d Form: 909b8f79-cdea-45d6-80ef-fde87cbf8ec0				

If <Fail> is selected, the UAT test list has an option to use the new Bug Reporting functionality for the failed form.



At the end of the list, the Tester can complete the UAT testing regime with the <Complete Test> button and conclude that UAT session.