



Inspec User Guide

ver. 2018-Apr

Form Administration

Forms Wizard

Role ⁵ Role Permiss	ions Needed
Role Value	Role Name
formAdmin	Form Administrator

The Forms Wizard will help the user create a form using basic broad steps. When the user desires to create a simple form that follows a common form type, they may use the Forms Wizard rather than the Forms Designer.

Steps-

Open <Forms Wizard> from the menu slide-out.

Select whether to use a new form or to open an existing form, using the <New Form> button or the <Open Form> button.

SELECTING A NEW FORM

Select the <New Form> tab.

E Menu 🏘 Home 🌢 admin 🔡 Forms Wizard	● 🗐 🗏 Tasks 🚺
Welcome to the Forms Wizard!	
Demo Foods → Plant 538 Connected	r1838 inspec

The screen will display the "Basic Form Information" prompt first.

Basic Form Information Enter basic form information.	Basic Form Information		
enter basic form mormation.	Select the type of form to create	Select Type	-
Miscellaneous Information Add miscellaneous information.	Enter Form Name	Form Name	
Preview and Complete Form Preview / Complete the form.	Import common fields	Yes No	
	Next		

Begin filling out the basic form information by selecting the form type desired in the < Select Type...> drop-down.

Basic Form Information	Basic Form Information		
nter basic form information.	Select the type of form to create	Select Type	,
Viscellaneous Information Add miscellaneous information.	Enter Form Name	Form Name	
Preview and Complete Form Preview / Complete the form.	Import common fields	Yes No	
	Next		

Next, enter a form name in the "Form Name" text box.

≡ Menu	🛎 admin 🛄 Forms Wiz	ard		•	🛢 Tasks 🚺
Basic Form Information Enter basic form informati	ion.	Basic Form Information Select the type of form to create	Select Type		-
Miscellaneous Information Add miscellaneous information		Enter Form Name	Form Name		
Preview and Complete Fr Preview / Complete the for		Import common fields	Yes No		
		Next			
Demo Foods → Plant 538	Connection Status: Connected			r1838	(in the second s

Lastly, indicate whether or not to import common fields, with the <yes> or <no> buttons.

Basic Form Information	Basic Form Information		
Enter basic form information.	Select the type of form to create	Select Type	•
Miscellaneous Information Add miscellaneous information.	Enter Form Name	Form Name	
Preview and Complete Form Preview / Complete the form.	Import common fields	Yes No	
	Next		

To move on from the "Basic Form Information" select <Next> below the data field.

≡ Menu # Home 🌲 admin 🛄 Forms V ■ New Form 🐸 Open Form	Wizard		🗩 🧾 🖺 Tasks 🚺
Basic Form Information Enter basic form information.	Basic Form Information		
	Select the type of form to create	Select Type	•
Miscellaneous Information Add miscellaneous information.	Enter Form Name	Form Name	
Preview and Complete Form Preview / Complete the form.	Import common fields	Yes No	
	Next		
Demo Foods	i		r1838 🕅 spec

The user will now be moved to the "Section Name" section.

≡ Menu 🖷 Home 🌢 admin 🛄 Forms Wiz	d: GMP05	🗩 🧾 🛢 Tasks 🧕
🖹 New Form 🛛 🚔 Open Form		
Basic Form Information Enter basic form information.	ection Name 💼	
Miscellaneous Information Add miscellaneous information.	Section Information Field Name Mandatory Enter section name to enable section controls	
Preview and Complete Form Preview / Complete the form.	Serup New Field Fed News Mandatory Yes 10 4 Add New Entry	
l	New Section Finished Sections	
Demo Foods > Plant 538 Connection Status: Connected		r1838 🕠 Spec

Select a section name and enter it into the text box.

sic Form Information ter basic form information.	Section Name Sanitation Form 1		Ê
nitation Form 1	Section Information		
scellaneous Information d miscellaneous information.	Field Name	Mandatory	
eview and Complete Form view / Complete the form.	Setup New Field:	Mandatory Yes No + Add New Entr	ry
	New Section Finished 5	sections	

The user may now fill out the section information or move past this section, it is not mandatory.

Basic Form Information	Section Name		<u> </u>
Enter basic form information.	Sanitation Form 1		
Sanitation Form 1	Section Information		
Miscellaneous Information Add miscellaneous information.	Field Name	Mandatory	
Preview and Complete Form	Setup New Field:		
Preview / Complete the form.	Field Name	Mandatory Yes No + Add New Entry	y
	New Section Finished S	ections	

Select <Finish Sections> to move onto "Miscellaneous INformation" or select "New Section" to add a new section.

≡ Menu 🖷 Home 🌡	admin 🔐 Forms Wiz	zard: GMP05		•	8	🗏 Tasks 🚺
🖹 New Form 🛛 🖨 Open Fo	orm					
Basic Form Information Enter basic form informatio Sanitation Form 1 Miscellaneous Information Add miscellaneous information Preview and Complete For Preview / Complete the form	n	Section Name Sanitation Form 1 Section Information Field Name Setup New Field: Field Name	Mandatory Mandatory Yes No + Add New Entry			
<u>Demo Foods</u> → Plant 538	Connection Status: Connected	New Section Finished Sections			r1838	Spec

Once the user has selected "finish sections" they will be moved to the Miscellaneous information section of the Forms Wizard.

≡ Menu # Home		zard: GMP05	• 🛙	🖻 Tasks 🚺
Basic Form Information Enter basic form information Sanitation Form 1 Miscellaneous Informatio	on.	Miscellaneous Information Add Picture Control? Yes No Preview Form		
Preview and Complete Re Preview / Complete the for Demo Foods Plant 538			r1838	Spec

The user will be prompted whether to add a picture control or not, do this by selecting either <Yes> or <No>.

E Menu	ns Witzard: GMP05	🗩 🗾 🗏 Tasks 🚺
Basic Form Information Enter basic form information. Sanitation Form 1	Miscellaneous Information Add Picture Contro Yes No	
Miscellaneous Information Add miscellaneous information.	Preview Form	
Preview and Complete Form Preview / Complete the form.		
Demo Foods Plant 538 Connection Status: Connect	ted	r1838 🔞 spec

Now select <Preview Form> to see a preview of the form created.

≡ Menu		ard: GMP05	• 8	🖺 Tasks 🚺
New Form Open For Basic Form Information Enter basic form Information Sanitation Form 1		Miscellaneous Information Add Picture Control? Ves No		
Miscellaneous Information Add miscellaneous information		Preview Form		
Preview and Complete Form Preview / Complete the form	<u>m</u>			
Demo Foods	Connection Status: Connected		r1838	spec 🕼

≡ Menu ಈ Home 🌢 admin 🛄 Forms Wiz	ard: GMP05	🗩 0 🗐 🗏 Tasks 📵
🖹 New Form 🛛 🚔 Open Form		
Basic Form Information Enter basic form information. Sanitation Form 1 Miscellaneous Information Add miscellaneous Information. Preview and Complete Form Preview / Complete the form.	No controls included Sanitation Form 1	(No Comments)
Demo Foods		r1838 (inspec

The user will now be brought to their form preview. If the user is satisfied with their form they may select <Complete Form> to move on or go back and make any necessary changes.

Form Popen Form		
er basic form information. ilitation Form 1 cellaneous information miscellaneous information.	No controls included Sanitation Form 1	Comments / Notes (No Comments)
view and Complete Form view / Complete the form.		Add Comment
	Complete Form	

The user then can find their form in the menu slide-out and begin using it as intended.

≡ Menu	希 Home	🛔 admin 🛛 🗰	Ŧ	SMP05: Overview				● ■ Tasks
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Ref #	Date +			Last Modified		Created By		Status
Q	1111				Q		Q	
No data four	<u>id</u>							
Demo Foo	ds → Plant 538	Connection Stat	us: Connecte	Form: a31e5b01-50c6-4d26-8fec-f8ed5cf3c303				r1838 🕠 Sp

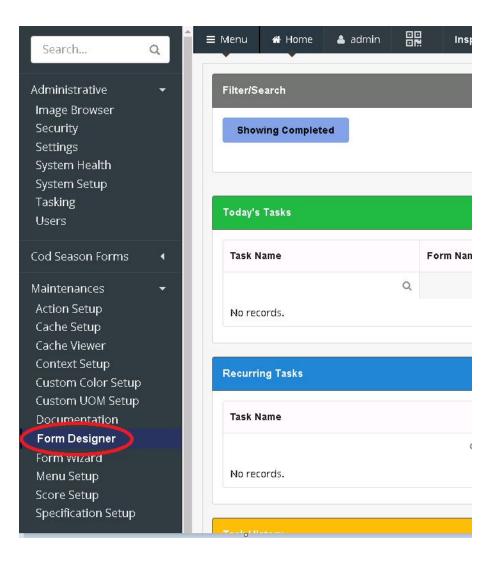
Forms Designer

Role ⁵ Role Permissions Needed							
Role Value	Role Name						
formAdmin	Form Administrator						

The Forms Designer is the one-stop-shop for the creation of all forms. Here a user can create a form for any general purpose/user group or specific user/purpose. The flow of commands and options for the forms designer is simple enough and can be understood with a moderate amount of time familiarizing oneself with the control possibilities. Where confusion may develop is with the function of specific control types and variables within those controls. In this section you will learn how to operate the intricacies of the forms designer, the flow of commands, the function of various control types, and variable within controls.

How to Create and Alter Forms

Altering forms is done in the Forms Designer. From the Main Menu, select Forms Designer in the Maintenance section.



The Form Designer will then open to the first screen. Here, you can elect to create a new form, import a form, or update an existing form.

≡ Menu	🖀 Home	🏝 admin		Forms Designer					
New Form	👻 🖕 Oper								
No fo	orm load	ded							
Icicle > HC	Q <u>Icicle</u> → Gor	don Jensen	Connec	ion Status: Connectec	k				

If you have worked on forms previously, the last 5 forms you have saved will show, instead of seeing "No form loaded".

≡ Menu	fc DR Forms Designer				● 0 🗐 📰 Tasks 🛂
			Recent Forms		
	Fresh Cod - Tank Temps	Fresh Cod - Bleeding	A Copy Test	A Label Test	
@ Demo Demo > Demo Foods	→ Main Plant <u>Coolearth</u> → Internal	Connection Status: Connected			dev លspe

Form Designer Overview

The Form Designer has several parts: Here is a screenshot of the entire screen, close-ups to follow:

≡ Menu 🐐 Home	🛔 admin 🛛 🚦	Forms Des	igner: Test Form (From Gri	d/instance)						۰ 🗐	🗉 Tasks 🧕
New Form 👻 👺 Open	Save [□ 2 Mor	e 👻 🔲 Editing Layout	Edit Properties	Edit Workflow	😇 Edit Grid Layout	Edit Documentation	ී View History	Manual Edit		
		Softwar	e Product: Inspec		Ô			Code	r's Unit Testing		Û
Test 67						Test 68					
Test 67						Test 68					
Add New Copy						Add New	Сору				
Demo Foods → Plant 538	Connection S	tatus: Connected	Form: aa609b05-e0fd-41e	5-85ff-8b336b06bf29						r1903	ကြာspec

≡ Menu	🖷 Home	🛎 admin	⊡⊡ ⊡™ Forms De	esigner: '	Test Form (From Grid	/Instance)		
New Form	- 🕒 Oper	n 🖺 Save	□ 2 Mo	ore 🝷	Editing Layout	Edit Properties	Edit Workflow	1
			Softwa	are Produ	ct: Inspec		Ô	
Test 67								
Test 67								
Add N	lew Cop	v						
Demo Food	ds → Plant 538	Connecti	on Status: Connected	Form	: aa609b05-e0fd-41e5	-85ff-8b336b06bf29		

New Form

≡ Menu	# Home	🛔 admin	Fo	Forms Designer: Test Form (From Grid/Instance)								
New Form	🔹 <table-cell-rows> 😂 Oper</table-cell-rows>	n 🖺 Save	□ 2	More 👻	Editing Layout	Edit Properties	Edit Workflow	₽				
🔓 Create	e Empty 🔺				•							
🖹 Copy	Existing			Software Produ	ict: Inspec							
🗎 Impor	rt File											
🛓 From	CSV											
🌮 Form	Wizard 🚽											
Add	New Copy	/										
	A											
Demo Foo	ds 🔺 Plant 538	Connecti	on Status: Conn	ected Form	: aa609b05-e0fd-41e5	-85ff-8b336b06bf29						

The New Form menu item allows you to create new forms in a variety of ways.

Create Empty

This allows you to create a completely new form. After selection Create Empty, you will see a popup dialog asking for the name of your new form. Form names must be unique within the system.

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t	In	spec			×	Tank Te	mps
		Title for new form					
Subfon	m			ок	CANCEL		
		-	Add	New			

After filling in the name, the form will be created, and you will be able to add controls.

Copy Existing

This allows you to create a new form by copying an existing one. You will be taken to a screen where you enter in the name of the new form, and select the existing one to copy.

	Add New Copy	
Copy Form		
ew Form Name	New Form Name	
lect Form to Copy	Select Form	
Сору	Cancel	

After filling out the information, press the green OK button. Inspec will create the new form, and it will be displayed to you so you can make any adjustments desired.

Import File

This is used when you have a JSON file containing a form. Selecting this entry will take you to a file selection dialog. Select the JSON file for your form, and press the Open button. The form will be imported. It will be given the same name as the JSON file.

From CSV

This is used when you have a CSV file containing a form. Selecting this entry will take you to a file selection dialog. Select the CSV file for your form, and press the Open button. The form will be imported. It will be given the same name as the CSV file.

Columns

You can set the number of columns to use on your forms here.

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New Form 🔹 🖻 Open 🖹 Save 🔲 2. More 👻 🖬 Editing Layout 💠 Edit Properties 🚍 Edit Workflow	호 Edit Grid Layout 🖉 Edit Documentation 🦻 View History Manual Edit
Software Product: Inspec	Coder's Unit Testing
Test 67	Test 68
Test 67	Test 68
Add New Copy	Add New Copy
Demo Foods > Plant \$38 Connection Status: Connected Form: aa609b05-e0fd-41e5-85ff-8b336b06bf29	1993 🕡 spec

It defaults to one. You can increase the number of columns by manually editing the number, or selecting the up or down arrows next to the number.

In addition, you can name the columns by manually entering the name at the top of each column in the display.

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New Form 🔹 🖆 Open 🖹 Save 🔲 2 More 🔹 🛅 Editing Layout 🔶 Edit Properties 🚍 Edit Workflow 📚	Edit Grid Layout 🖉 Edit Documentation 🦻 View History Manual Edit
Software Product: Inspec	Coder's Unit Testing
Test 67	Test 68
Test 67	Test 68
Add New Copy	Add New Copy
Demo Foods Plant 538 Connection Status: Connected Form: aa609b05-e0fd-41e5-85ff-8b336b06bf29	ляаз <mark>Ю</mark> ѕрес

More

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New Form 👻 🖨 Open	🖺 Save		More	- Editing L	a out 🔹 i	Edit Properties	Edit Workflow	🔄 Edit Grid Layout	Edit Documentation	ී View History	Manual Edit		
			70	Generate SQL									
				xport to file			Û			Code	r's Unit Testing		Ô
Test 67			A 1	mport from file				Test 68					
Test 67				Delete Form				Test 68					
Add New Copy				velete Form				Add New	Сору				
Demo Foods → Plant 538	Connectio	on Status: C	onnected	Form: aa609b05-e0	fd-41e5-85ff-8	b336b06bf29						r1903	

The More menu has selections for working with the form. You can:

Generate SQL

Generate a script for T-SQL which will convert your SQL persistence schema to accommodate the new fields you have added. This is for when you do not have administrative access to do schema changes and need to process the change through your DBA. This update is normally done automatically by the persistence engine.

Export to File

This allows you to save the open form to a JSON file.

Import from File

This does the same as Import File in the New Form menu.

Open

The Open selection will allow you to open an existing form. Pressing the Open button will show you a list of all the forms currently in the system.

≡ Menu 🐐 Home New Form 👻 🖙 Open	🛎 admin 🛛 🛄	Forms Designer			🗭 0 🧧 🗮 Tasks 🚺
			Recent Forms		
		Test Form (From Grid/Instance)	QC Data Forms	Sanitation Elev.	
Demo Foods → Plant 538	Connection State	rus: Connected			r1903 (inspec

Search Q	Show 64 + Forms						H € 1 2 → H
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anitation Forms	Sanitation Forms	Sanitation Forms	Sanisation Forms	Sanitation Forms	Sanitation Forms	Sanitation Forms	Sanitation Forms
313	741	741-2	August Regression Test- Forms Designer	COOKE DEMO FORM	Cart Inspection	Cart Survey	Case Label Checklist
anitation Forms	Sanitation Forms	Sanitation Forms	QC Forms	Sanitation Forms	GMPs > Inspections > Machine Equipment Inspections	GMPs > Surveys > Machine Equipment Surveys	GMPs > Checklists > Product Checklists
Case Label Inspection	Case Label Survey	Columbus Forms 002	Corrective Action Reports	Default Test Form	Demo Form	Employee Hygiene Checklist	Employee Hygiene Inspection
CMPs > Inspections > Product Inspections	GMPs > Surveys > Product Surveys	Sanitation Porms	QC Forms	QC Forms	QC Forms	GMPs > Checklists > Personnel Checklists	GMPs > Inspections > Personnel Inspections
Employee Hygiene Survey	Employee PPE Checklist	Employee PPE Inspection	Employee PPE Survey	Finished Product Inspection	Floor Checklist	Floor Inspection	Floor Survey
MPs > Surveys > Personnel Surveys	GMPs > Checkloss > Personnel Checkloss	GMPs > inspections > Personnel Inspections	GMPs > Surveys > Personnel Surveys	GMPs > Inspections > Product Inspections	GMPs > Checklists > Site/Building Checklists	GMPs > Inspections > Site/Building Inspections	GMPs > Surveys > Ster/Building Surveys
Foreign Object nspection	Form Test 01	GMP05	KEYBOARD MONKEY SETUP	Lighting Checklist	Lighting Inspection	Lighting Survey	MJCLISTTEST
SMPs. > Inspections > Product Inspections	QC Forms	QC Forms	Sanitation Forms	GMPs > Checklists > Ster/Duilding Checklists	GMPs > Inspections > SterBuilding Inspections	GMPs > Surveys > Site/Building Surveys	QC Forms
MJCRenameFormTest	MJCRenameFormTestREN	Machine Calibration Checklist	Machine Calibration	Machine Cleaning Checklist	Machine Cleaning Inspection	Machine Settings Checklist	Machine Settings Inspection
2C Forms	Sanitation Forms	GMPs > Checklists > Machine Equipment Checklists	GMPs > Inspections > Machine Equipment Impections	GMPs > Checklists > Machine Equipment Checklists	GMPs > Inspections > Machine Equipment Inspections	GMPs > Checklists > Machine Equipment Checklists	GMPs > Inspections > Machine Equipment Inspections
Maintenances	Metal Detection Inspection	Metal Detector Inspection	Metal Detector Seed Verification	New Product Tracking - Core	Organaleptic Inspection	Pallet Label Checklist	Pallet Label Inspection
JC Forms	GMPs > Inspections > Machine Equipment Inspections	QC Forms.	QC Forms	QC Forms	GMPs > Inspections > Product Inspections	GMPs > Checkästs > Product Checklists	GMPs>Inspections>Product Inspections
Pallet Label Survey	Planned Food Safety & Quality	Pre-Op Cleaning Inspection	Pre-Op Cleaning Survey	QC Data Forms	REGR. 001	REGR. 002	REGR. 003
MPs > Surveys > Product Surveys	QC Parms	GMPs > Inspections > Site/Duilding Inspections	GMPs > Surveys > Site/Building Surveys	QC Forms	Sanitation Forms	Sanitation Forms	Sanitation Forms

Just select the form you wish to update, and double-click on it. The form will open in the Designer, and will be ready for editing.

Edit Layout

The Edit Layout tab shows you the controls on the form, and where they are located. You can make changes to the controls here.

Select<Add New Control>

Name the control.

The "Control Settings" slideout will appear to the user on the righthand side of the edit layout screen. Select the control type desired, "Text" is the defaulted control.

There are several control types to choose from, these include:

Text, Button Bar, Basic Charts, Date/Time, Digital Signature, Dropdown, Dynamic Control, Include Form, Label, List, Numeric, Pass/Fail, Picture, Quantity, Sample, Section, SPC Chart, Tally/Counter.

Each of these controls have unique sub-settings that are specific to the selected control. However, some share sub-settings. All controls share a few general sub-settings. These are as follows,

Define a legend for the control.

Define a short ("sub") legend for the control.

Select control groups for the control.

Select a color value that the form designer wishes the form be displayed in.

Toggle <Enable> or <Disable> to make the form mandatory. When enabled, the control will have to be completed before the form can be finished.

Toggle <Enable> or <Disable> to hide the control on the table. This will hide any controls that are not required, by the user.

Toggle <Enable>, <Disable>, or <Global> to specify how to display the form header.

Text

The text control creates a typeable field that can be used, by the user, to enter information into a form.

🗏 Menu 🏘 Home 🛓 admin 📴 Forms Designer: Sanitation Elex. New Form 🔹 🏷 Open 🔁 Save 🔲 1 More 🔹 📰 Editing Layout 🕏 Edit Properties 🗊 Edit Workflow 🏂 Edit Grid Layout 🖉 Edit Documentation 🏵 View History Manual Edit		🗩 0 🧾 🏼 Tasks 🚺
Test Controls	Control Settings	ŵ
	Name	TestControls
Add New Control Copy "Test Controls "	Туре	Text •
	Legend	Test Controls
	Short Legend	
	Control Groups	•
	Color	White (Default)
/	Allow Inlining	Enable Disabled
	Multiline	Enable Disabled
	Number of lines	2
	Placeholder	
	Hide Empty Readonly	Enable Disabled
	Regular Expression	
· · · · · · · · · · · · · · · · · · ·	Mandatory	Enable Disabled
	Hide On Table	Enable Disabled
	Show Header	Enable Disabled Global
Demo Foods + Plant 538 Connection Status: Connected Form: 81a9ace8-0e5d-4589-be91-d5368a477b32		r1906 iii)spec

To configure the text control,

Select the text control in the "Control Type" dropdown.

Next, select any control groups that apply.

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New Form 🔹 🖕 Open 🖄 Save 🔟 1 More 🔹 🔜 Editing Layout 🗢 Edit Properties 📾 Edit Workflow 🏚 Edit Grid Layout 🔮 Edit Documentation 🏵 View History Manual Edit		
Test Controls Test Controls	Control Settings	â
	Name	TestControls
Add New Control Copy "Test Controls "	Туре	Text •
	Legend	Test Controls
	Short Legend	
	Control Groups	1
This lets you group controls together so actions and other pa duplicated or maintained for each control. A control can be i	rts of the system can refer to th n multiple groups	e group in bulk, and not need to be manuall
	Allow Inlining	Enable Disabled
	Multiline	Enable Disabled
	Number of lines	2
	Placeholder	
	Hide Empty Readonly	Enable Disabled
	Regular Expression	
	Mandatory	Enable Disabled
	Hide On Table	Enable Disabled
	Show Header	Enable Disabled Global
Demo Foods + Plant 538. Connection Status: Connected Form: 81a9ace8-0e5d-4589-be91-d5368a4f7b32		r1906 🔞

Toggle <Enable> or <Disable> to specify whether to allow inlining.

st Controls Test Controls					Control Settings			Û
					Name	TestContro	ls	
Add New Control	Copy "Test Controls "				Туре	Text		
					Legend	Test Contro	ols	
					Short Legend			
					Control Groups			
					Color	White (Def	ault)	
					Allow Inlining	Enable	Disabled	
					Multiline	Enable	Disabled	
					Number of lines	2		
					Placeholder			
					Hide Empty Readonly	Enable	Disabled	
					Regular Expression			
					Mandatory	Enable	Disabled	
					Hide On Table	Enable	Disabled	
					Show Header	Enable	Disabled	Global

Then, toggle <Enable> or <Disable> to specify whether to allow multiple lines.

🗏 Menu 🖷 Home 🎍 admin 📴 Forms Designer: Sanitation Elev. New Form 🔹 🏷 Open 🖹 Save 🔲 1 More 🔹 Editing Layout 🌢 Edit Properties 💷 Edit Workflow 🐲 Edit Grid Layout 🥔 Edit Documentation 🄊 View History Manual Edit		🗭 0 🧾 🗐 Tasks 🧧
Test Controls Test Controls	Control Settings	<u></u>
	Name	TestControls
Add New Control Copy "Test Controls "	Туре	Text •
	Legend	Test Controls
	Short Legend	
	Control Groups	
	Color	White (Default)
	Allow Inlining	Enable Disabled
	Multiline	Enable Disabled
	Number of lines	2
	Placeholder	
	Hide Empty Readonly	Enable Disabled
	Regular Expression	
	Mandatory	Enable Disabled
	Hide On Table	Enable Disabled
	Show Header	Enable Disabled Global
Demo Foods + Plant 538 Connection Status: Connected Form: 81a9ace8-0e5d-4589-be91-d5368a4f7b32		risos 🔞 spec

Specify the number of lines desired, using the numerical field.

est Controls Test Controls					Control Settings			Û
					Nam	TestContro	ols	
Add New Control C	opy "Test Controls "				Тур	Text		
					Legen	Test Contr	rols	
					Short Legen			
					Control Group	r [
					Colo	White (Del	fault)	
					Allow Inlinin	Enable	Disabled	
					Multilin	Enable	Disabled	
					Number of line	2		
					Placeholde			
					Hide Empty Readon!	Enable	Disabled	
					Regular Expression			
					Mandator	Enable	Disabled	
					Hide On Tabl	Enable	Disabled	
					Show Heade	Enable	Disabled	Global

Enter a text type value, desired by the user, into the placeholder field to act as a placeholder in the control.

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Test Controls Test Controls	Control Settings	<u> </u>
	Name	TestControls
Add New Control Copy "Test Controls "	Туре	Text *
	Legend	Test Controls
	Short Legend	
	Control Groups	•
	Color	White (Default)
	Allow Inlining	Enable Disabled
	Multiline	Enable Disabled
	Number of lines	2
	Placeholder	
	Hide Empty Readonly	Enable Disabled
	Regular Expression	
	Mandatory	Enable Disabled
	Hide On Table	Enable Disabled
	Show Header	Enable Disabled Global
Demo Foods Plant 558 Connection Status: Connected Form: 81a9ace8-0e5d-4589-be91-d5368a4f7b32		r1906 (inspec

Toggle <Enable> or <Disable> to specify whether to hide the field if it is left empty by the user.

ist Controls Test Controls	Control Settings			Ŵ
	Name	TestControls		
Add New Control Copy "Test Controls "	Туре	Text		
	Legend	Test Controls		
	Short Legend			
	Control Groups			
	Color	White (Default)	
	Allow Inlining	Enable	Disabled	
	Multiline	Enable	Disabled	
	Number of lines	2		
	Placeholder			
	Hide Empty Readonly	Enable	Disabled	
	Regular Expression			-
	Mandatory	Enable	Disabled	
	Hide On Table	Enable	Disabled	
	Show Header	Enable	Disabled G	ilobal

Enter any text to be left as a regular expression.

🗏 Menu 🖷 Home 🎍 admin 🔡 Forms Designer: Sanitation Elev. New Form + 🖆 Open 🖹 Save 🔲 1 More + 🔳 Editing Layout 🗘 Edit Properties 💷 Edit Workflow 🕸 Edit Grid Layout 🥔 Edit Documentation 🄊 View History Manual Edit		🗭 0 🗐 🗮 Tasks 👤
Test Controls Test Controls	Control Settings	
	Name	TestControls
Add New Control Copy "Test Controls "	Туре	Text •
	Legend	Test Controls
	Short Legend	
	Control Groups	
	Color	White (Default)
	Allow Inlining	Enable Disabled
	Multiline	Enable Disabled
	Number of lines	2
	Placeholder	
	Hide Empty Readonly	Enable Disabled
	Regular Expression	
	Mandatory	Enable Disabled
	Hide On Table	Enable Disabled
	Show Header	Enable Disabled Global
Demo-Foods Plant 538 Connection Status: Connected Form: 81a9ace8-0e5d-4589-be91-d5368a4f7b32		r1906 inspec

Button Bar

The Button Bar creates a toggleable subcontrol that will perform a set action when selected by the user responsible for completing the form.

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	Control Groups		
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	Hide On Table	Enable Disable	d
	Show Header	Enable Disable	d Global

To configure the Button Bar control,

Select the Button Bar control in the "Control Type" dropdown. Next, select and active button color. This color will flash when the button is activated.

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Toggle <Enable> or <Disable> to specify whether to allow Specifications/Scores.

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Toggle <Enable> or <Disable> to specify whether to allow the user to select multiple buttons in the same bar.

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Toggle <Enable> or <Disable> to specify whether to allow distinct buttons.

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	Auto-Select If One Button	Add New Enable Disabled
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	Hide On Table	Enable Disabled
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To create a button, in the Button Bar, select "Add New".

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Next, name the button and select an onset role, from the dropdown.

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Enter values into the text field to create the display the button will read.

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Create a numerical value for the button, that increases with the number of buttons created, in the text field.

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Toggle <Enable> or <Disable> to specify whether to allow auto selection of a button, in the bar, when nothing is selected.

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	Auto-Select If One Button	Enable Disabled
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Basic Chart

The Basic Chart control creates a visual aid for the form users, that will display custom data created by the form designer.

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To create a Basic chart,

Select the Basic Chart control in the "Control Type" dropdown. Establish a data set by selecting "Add New" Next, name the button and select an onset role, from the dropdown.

Toggle <Fixed> or <Table>, to the users preference.

Enter values into the text field to create the display the button will read.

Create a numerical value for the button, that increases with the number the data entered, in the text field.

Enter the user's desired value for the X-axis Time format.

Enter the user's desired title for the chart, in the chart title field.

Add any notes for the chart to the chart subtitle formats, and select a control value.

Date/Time

The Date/Time control allows the user to establish a field that will save the date and time of a forms completion, and other time points in the form's life.

To create a Date/Time control,

Toggle <Enable> or <Disable> to allow inlining.

select a format the best suits the form's needs. The default format will be YYYY-MM-DD HH:mm:ss. This will present the date and time with the Year-Month-Day followed by the Hour:Minute:second.

Toggle <Enable> or <Disable> to choose between past or future only. The two subsettings must have opposite values.

Enter a time span desired, value must be entered in days.

Toggle <Enable> or <Disable> in regard to time stamp mode, for the date/time control.

Toggle <Enable> or <Disable> in regard to stamp text, given time stamp mode is enabled.

Toggle <Enable> or <Disable> to show the current time, when in the form.

Toggle <Enable> or <Disable> to hide or show the time portion.

Digital Signature

The Digital Signature control allows a user to sign a form with their specific user credentials.

Standard Information Only

Drop Down

The Drop Down control will present selectable preset values to a form user so that they may provide information adhering to preset data.

Toggle <Enable> or <Disable> to allow specifications/scores, or to disable them.

Toggle <Enable> or <Disable> to allow inlining.

Toggle <Enable> or <Disable> to allow the form's user to select multiple dropdown menu options.

To configure dropdown items. Select "Add New". Then enter a name desired in the name field. Select an onset option from the menu dropdown. Enter the type of dropdown item desired by toggling <Fixed> or <Table>. Lastly, create a numerical value for the dropdown item, that increases with the number of items entered, in the

text field.

Toggle <Enable> or <Disable> to allow text entry, by the form's user, in the dropdown menu.

Dynamic Control

Include Form

The Include Form control will embed one form inside of another, the embedded form will have to be filled out to complete the parent form.

Select the form desired by the user in the "Form" dropdown.

Label

The Label control will act as a section header for additional "sub" controls. The text inside of the "Name" field will act as the label, in the Label control.

Toggle <Enable> or <Disable> to allow static text in the control, to the user's preference. Add additional text in the "Text" subsetting field. This text will show up underneath the label header.

List

The list function allows the user to create a list within the form.

Toggle <Enable> or <Disable> to allow the user to see multiple lines in the list. Specify the number of lines desired in the list. Enter a placeholder for the list, that will display until data is entered by the form's user.

Numeric

The Numeric control is used when the data entered by the user will be only a numerical value.

Toggle <Enable> or <Disable> to allow specifications/scores, or to disable them.

Toggle <Enable> or <Disable> to allow spec popups or not, to the user's preference.

Toggle <Enable> or <Disable> to allow inlining.

Enter a placeholder for the numeric, that will display until data is entered by the form's user. Define the precision desired in the numeric.

Enter a default value that will be displayed and used until unique data is entered by the form's user. Enter a minimum value the will not allow the user to enter values lower than that of the minimum value. Enter a maximum value the will not allow the user to enter values lower than that of the maximum value.

Pass/Fail

The Pass/Fail control allows a user to efficiently and quickly deny a form to pass, based on data observed that would conclude this.

Toggle <Enable> or <Disable> to allow inlining. Define a fail action that would be executed should the form fail. This could include actions such as sending emails to admins or launching another inquiry form.

Define a pass action that would be executed should the form pass. This could include actions such as sending emails to admins or launching another additional form to the user.

Enter text data that the form creator wishes to see on the pass button. This could be as simple as "Pass" or "Form Approved".

Enter text data that the form creator wishes to see on the fail button. This could be as simple as "Fail" or "Form Denied".

Picture

The Picture control allows the user to see an image that could be used for reference related to ground floor items.

Toggle <Enable> or <Disable> to allow the image not to be available to the form's user.

Quantity

The Quantity control enables the user to have access to a concise UOM control to display the amount of product on the floor.

Toggle <Enable> or <Disable> to allow specifications/scores, or to disable them.

Toggle <Enable> or <Disable> to allow spec popups or not, to the user's preference.

Toggle <Enable> or <Disable> to allow inlining.

Toggle <Enable> or <Disable> to allow the form's user to modify the UOM chosen.

Enter desired UOM data into the UOM legend.

Define the UOM type desired for the form. This should mirror the product on the floor.

Define the precision desired in the quantity.

Enter a minimum value that will not allow the user to enter values lower than that of the minimum value. Enter a maximum value that will not allow the user to enter values lower than that of the maximum value.

Sample

Toggle <Enable> or <Disable> to allow specifications/scores, or to disable them.

Toggle <Enable> or <Disable> to allow spec popups or not, to the user's preference.

Toggle <Enable> or <Disable> to allow inlining.

Define the precision desired in the sample.

Enter the desired task schedule frequency. This will determine how often the task is assigned to the specified users.

Enter a minimum value of samples, this will not allow the user to enter sample values lower than that of the defined minimum value.

Enter a maximum value of samples, this will not allow the user to enter sample values lower than that of the defined maximum value.

Define the UOM type desired for the form. This should mirror the product sample on the floor.

Enter a maximum duration for the sample.

Define any titles desired for the sample control.

Section

The Section control will place controls within the defined section to allow for form organization.

Toggle <Enable> or <Disable> to allow the form's user to collapse the section if they wish. This could be done if they do not wish to complete the controls or to allow for easier form navigation.

SPC Chart

Tally/Counter

The Tally/Counter control will allow the form to track data easier with arrows for adding the numerical values together.

Toggle <Enable> or <Disable> to allow specifications/scores, or to disable them.

Toggle <Enable> or <Disable> to allow spec popups or not, to the user's preference.

Toggle <Enable> or <Disable> to allow inlining.

Toggle <Enable> or <Disable> to allow a "zero" button that will bring the added values to zero again when selected.

Enter a minimum value that will not allow the user to enter values lower than that of the defined minimum value.

Enter a maximum value that will not allow the user to enter values lower than that of the defined maximum value.

Layout Window

Control Settings ([right side] slide out)

<Add New Control> button

<Copy> (Control) button

Control Types

Edit Properties

The Edit Properties tab allows you to make changes to the form.

Behavior & Properties		Action	S	Security	
Name	On form load			Role for Approval	
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Title	On form finish			View other users forms role	
Fresh Cod - Tank Temps				▼ None	•
Comment Tabs	Action Triggers			Delete form instance role	
None	Formula	Actions	One-Shot	None	•
Required Context level	No triggered actions				
None			• One-Shot	Add	
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Edit Workflow

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From this menu you can make various changes to the workflow like specifying on enter actions, permissions, titles, etc. To establish a title for the workflow segment click

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Edit Grid Layout

This is where changes to how the form instances are displayed in the form header grid.

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Under "Edit Grid Layout" Basic overriding options will be present. Then specific field options will be presented With the specific field options a user can modify how fields within the grid are presented.

Grid Optio	ins			Fiel	d Options			
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g Lifetime Form (Incomplete forms don't expire)	Yes No	≁ Official Time	Auto	~ 🗸 X	¥ ×	=	* *	Hide Show
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			Auto	• • ×	~ ×		* *	Hide Show
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		♪ Form Version	Auto	•	×	✓ ×	=	* *	Hide Show
		♪ Actual Time	Auto	*	×	✓ ×	=	* *	Hide Show
		₽ Total Score	Auto	*	×	 ✓ × 	-	+ +	Hide Show
		₽ Last Modified	Auto		×	✓ ×		•	Hide Show
			Auto	• •	×	✓ ×	=	* *	Hide Show
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Edit Documentation

This is where you can write up documentation for the form.

For a user with administrator privileges documentation can be written or changed.

View History

This is where you can view the history of the work done on the form. If needed, you can revert to a previous version of the form.

Update an Existing Form

Open the form you want to edit in the Form Designer.

Add a control:

In order to add a new control, go to the area of the form where you want the new control. Press the Add New button.

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Column 1	Column 2
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Select Lot Code	Box Tare (Lbs)
* Byproduct	* Gross Weight of Box (Lbs)
Select Byproduct	Gross Weight of Box (Lbs)
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	Pass Fail
	Add New Copy
Iticle > HQ Icicle > Gordon Jensen Connection Status: Connected	

You will be asked to give the new control a name.

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			Total Weight of	#3 Milt (g)	
			Total Weight of #	/4 Milt (g)	
			Total Weight of	#4 Milt (g)	

After filling out the new control name, the control will be displayed, and you will see a list of properties of the control that you can fill out, or select from.

E Lot Code Total Weight of #1 Milt (g) Select Lot Code Total Weight of #1 Milt (g) Test one Total Weight of #2 Milt (g) Test one Total Weight of #2 Milt (g)	Column 2 Control Settin Nam Try Leger Short Leger	Testone Text. Ind Test one	<u>ش</u>
Select Lot Code Total Weight of #1 Milt (g) Test one Total Weight of #2 Milt (g) Total Weight of #2 Milt (g) Total Weight of #2 Milt (g)	Tyr Leger Short Leger	nd Test one	
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Test one Total Welght of #2 Milk (g)	Leger Short Leger	nd Test one	
		nd	
Total Weight of #3 Milt (g)			
Add New Copy "Test one" Total Weight of #3 Milt (g)	Control Group	35	
Total Weight of #4 Milt (g)	Col	or White (Default)	-
Total Weight of #4 Milk (g)	Multilit	ne Enable Disat	bled
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Add New Copy "Test one"	Placehold	er	
	Hide Emp Readon		bled
	Regular Expressio	חנ	
	Mandato	ry Enable Disat	bled
	Hide On Tab	Enable Disat	bled
	Show Head	er Enable Disat	bled Global
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You can change the type of the control, and the list of property settings will change to reflect the new type.

When you have finished entering the information regarding your new control, be sure to press the Save button at the top of the screen.

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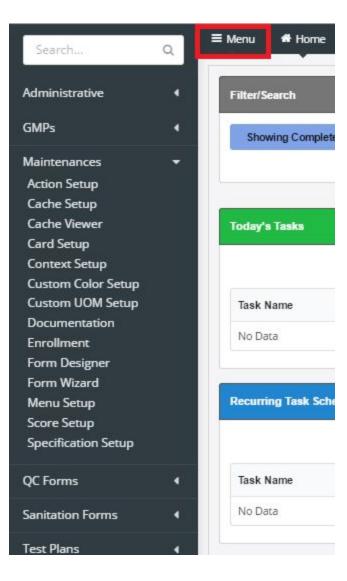
Change an existing control:

Select the control to be changed by clicking on it. You will see the Control Settings displayed on the right-hand side of the screen, just like when adding a new control. Make any needed changes to the settings, and press the Save button at the top of the screen.

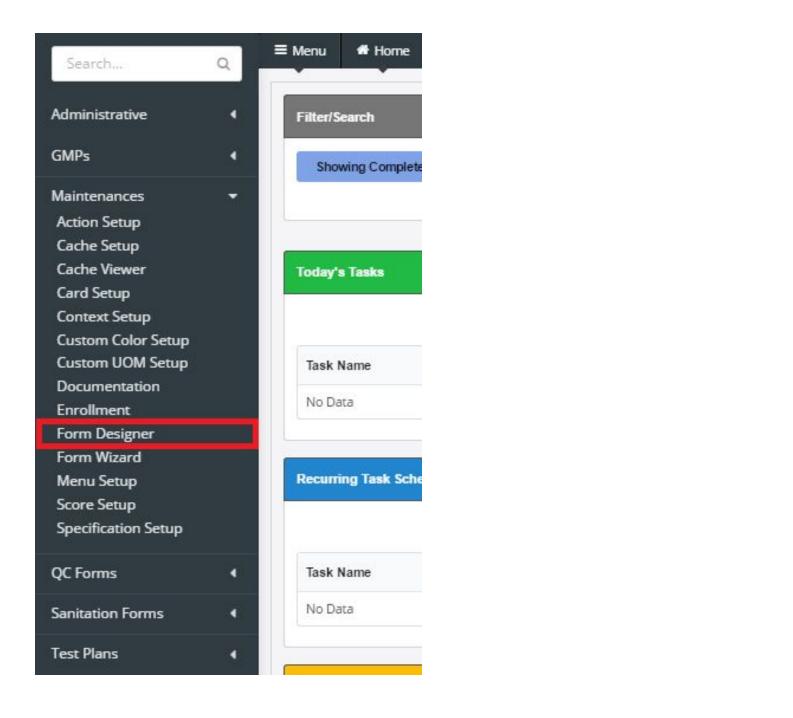
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How to Delete a Form

To get to the forms designer screen select the <Menu> slide-out. Select the <Maintenances> drop-down and select <Forms Designer>.



Search	Q	≡ Menu	🕈 Home
Administrative	4	Filter/S	earch
GMPs	•	Shov	wing Complete
Maintenances	•		
Action Setup			
Cache Setup			
Cache Viewer		Today's	a Tasks
Card Setup			
Context Setup			
Custom Color Setup			
Custom UOM Setup		Task M	lame
Documentation			
Enrollment		No Da	ta
Form Designer			
Form Wizard			
Menu Setup		Recurri	ng Task Sche
Score Setup			
Specification Setup			
QC Forms	•	Task N	lame
Sanitation Forms	4	No Da	ta
Test Plans	٩		



≡ Menu 🖀 Home	admin 📴 Form	ns Designer		🗩 0 🟉 🗏 Tasks 🚺
New Form 🔹 🛸 Open				
			Recent Forms	
		QC Data Forms	Sanitation Elev.	
Demo Foods	Connection Status: Connec	tted		r1872 (inspec

Open the form the user wishes to remove.

≡ Men	u 4	Home	🛔 admin		Forms Designer					۵ هم	🖺 Tasks 🚺
New For	m -	🖶 Ope	n								
							Recent	Forms			
						QC Data Forms		Sanitation Elev.			
						QC Data Forms		Sanitation Elev.			
Demo F	oods →	Plant 53	3 Connec	tion Status	: Connected					r1872	(in) spec
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≡ Men											
New For											
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								ancel			
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≡ Menu 🛭 🖨 Home	占 admin	©© ⊡M Forms D	esigner: Test Form Document	ation	a			c		۶	• 🛢	🗏 Tasks 🧕
New Form 👻 👺 Open	🖺 Save	Ш 1 М	ore 🔹 🔲 Editing Layout	Edit Properties	🔲 Edit Workflow	莘 Edit Grid Layout	Edit Documentation	ී View History	Manual Edit			
Add New Control	Сору											
												-
Demo Foods	Connecti	on Status: Connected	Form: 5beb6be6-b478-4b	f6-b555-a926e9ebde12							r1872	(Wspec

Navigate to the <More> subtab, in forms designer.

≡ Menu 🖀 Home	占 admin	Forms l	Designer: Test Form Documental	Son				ai .		۰ 🍠	🖻 Tasks 🚺
New Form 🔹 🛸 Op	en 🖺 Save	III 1	More 🔹 🗏 Editing Layout	Edit Properties	🔲 Edit Workflow	莘 Edit Grid Layout	Edit Documentation	ම View History	Manual Edit		
Add New Control	Сору										
Demo Foods	8 Connect	ion Status: Connecter	d Form: 5beb6be6-b478-4bf	6-b555-a926e9ebde12						r1872	W spec

Select "More" and then proceed to the "Delete Form" action and select it. The system will display a safety action that ensures the user wishes to remove the form permanently

≡ Menu 🗌 Home 🌢	admin	Fc	rms Designer: '	Test Form Docume	itation						۵ هم	🖾 Tasks 🧕
New Form 👻 🐸 Open	🖹 Save		More 🕶	🔲 Editing Lay ou	t 🗘 Edit Properties	Edit Workflow	🕸 Edit Grid Layout	Edit Documentation	ම View History	Manual Edit		
			🎢 Gener	rate SQL 🔶								
Add New Control	Copy		Export	rt to file								
			Impor	rt from file								
			× Delete	e Form 🗸								
Demo Foods	Connection	n Status: Conr	ected Form	n: 5beb6be6-b478-4	bf6-b555-a926e9ebde12						r1872	(inspec

≡ Menu # Home 🌢 admin 🛄 F	orms Designer: Test Form Documentation	۰ 🍠	🗏 Tasks 🚺
New Form 👻 🗁 Open 🔛 Save 💷 1	More 🔹 🔲 Editing Layout 🕈 Edit Properties 🔤 Edit Workflow 💈 Edit Grid Layout 🥔 Edit Documentation 🤍 View History 🛛 Manual Edit		
	✗ Generate SQL ▲		
Add New Control Copy	▲ Export to file		
	Import from file		
	× Delete Form		
Demo Foods	nected Form: 506060-04/8-40f6-b555-a92669ebde12	r1872	W spec

Select "Yes, delete form" to discard the form. The system will return the user to the forms designer load screen.

🗏 Menu 🐗 Home 🕼 admin 🔠 Form Designer: Test Form Documentation	🗩 G 📕 🗏 Tasks 🔟
New Form + 🖆 Open 🔄 Save 🗇 1 More + 🔲 Editing Layout 🕴 Edit Properties 🕮 Edit Workflow 🛱 Edit Grid Layout 🔮 Edit Documentation 🧇 View History Manual Edit	
Add New Control Copy	
Demo Boods + Plant 538 Connection Status: Connected Form: SpebibleS-b478-4bf6-b555-a926e9ebde12	
Delete Form Test Form Documentation ?	
No Yes, delete Test Form Documentation 🗊	

≡ Menu # Home New Form •	🛓 admin 🛛 🖬 🖌 F	Forms Designer			🗭 0 🥫 🖺 Tasks 🚺
				Recent Forms	
			QC Data Forms	Sanitation Elev.	
Demo Foods	Connection Status: Cor	nnected			1872 (i) Spec

How to Promote Forms (Change Management) (ToDo)

Data Review & Approval Management (ToDo)

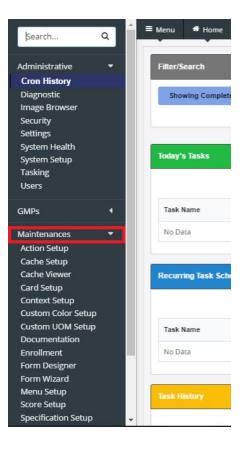
Role ⁵ Role Permiss	ions Needed
Role Value	Role Name
dataAdmin	Data Administrator

Action Management

Role Permissions Needed								
Role Value	Role Name							
formAdmin	Form Administrator							

To get to the cache management select the <Menu> slide-out. Next, the <Maintenances> drop-down. Lastly, <Cache Setup>.

þearch	۹	Ē	lenu 希 Home	🌢 ađmin	Inspec				
Administrative			Filter/Search						Search
Cron History Diagnostic			Showing Comple	eted	Showing All Users	Simple Time	Full Time	Added	Due Date



Search	Q	≡ Menu	# Home
Administrative	4	Filter/S	earch
GMPs	4	Sho	wing Complete
Maintenances			
Action Setup			
Cache Setup			
Cache Viewer		Today's	s Tasks
Card Setup			
Context Setup			
Custom Color Setup			
Custom UOM Setup		Task I	Jame
Documentation		raskr	tame
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Form Designer			
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Menu Setup		Deserved	
Score Setup		Recurr	ing Task Sch
Specification Setup		1.0	
QC Forms	4	Task 1	Name
Sanitation Forms	4	No Da	ta
Test Plans			

To use action setup,

Select <Add New Action>, in the action setup screen.

≡ _{Menu}	# Home	着 admin	Action Setup			
Cont	figured A	Actions			¢	-
Search	h			Q	+ Add New Acti	on
					sqlaction	0

Now the user will be brought to the action editing screen. Choose an action type, with the "Action Type" drop-down.

E Menu # Home & admin DO Action Setup			🧾 🖻 Tasks 🧧
Configured Actions	¢ -	Editing - Test Action	Û
Search Q	+ Add New Action	Action Type	
		Email	*
	sqlaction 🍳	Groups	
	adjustSchedule Q	Select or Enter a New Action Group Name	•

Choose a group to assign the action to.

E Menu 🐗 Home 🌢 admin 📴 Action Setup			🧧 🗏 Tasks 🧧
Configured Actions	¢ -	Editing - Test Action	Ŵ
Search	+ Add New Action	Action Type	•
	sqlaction 🖗	Groups	~~~
	adjustSchedule 😡	Select or Enter a New Action Group Name	•
711	email	То	
August 5th Test this is totally a test Case Label Survey	email Q	Subject	
August 5th Tast10			

Complete the remainder of the form specific to the action chosen by the user.

I Menu # Home 🛔 admin 🔛 Aolion Selup		las .	🧾 🗏 Tasks 💄
Configured Actions	¢ •	Editing - Test Action	Û
	Q + Add New Aston	Action Type	
		Email	
		Groups	
		Select or Enter a New Action Group Name	× .
		То	
		Subject	
		Necage	
		B/S IEE =	
		Form Name:	
		Control Name:	
		Attach Form Pictures	
		Yes No	
		Attachment size limit in Mb (16)	
		Max Number attached emails (6)	
		Global lask Action Un Insert	
		Enable Disable	
		Global Task Action On Expiration	
		BAVE 📀	

Choose global task action on insert and expiration, with either <enable> or <disable>.

≣ Menu # Home 🎍 admin 🛄 Aoton Solap		atat 🔳
Configured Actions	¢ -	Editing - Test Action
scarhQ	+ Add New Aolton	Action Type
		Email
	Q nother	Groups
	wijustSchedule Q	Solets or Enter a New Action Group Name
711	mai	To
August 5th Test this is totally a test Case Label Survey	errai Q	Subject
August 5th Test10	sqfaction	
August 5th Test2 Inspec.Cache.Reds	ruhush Cache	Berage
August 5th Test3	pausettok	B/8 (5) #=
August 5th Test4 Case Label Inspection	. IsunchForm	
August 5th Test5 522	selCorValue	Form Name:
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August 5th Test7 500	disabteOrts	
August 5th Test8	deathrollment	Attach Form Pictures
August 5th Test9	adjustSchedule	Attachment size limit in Mb (16)
Control Readonly Test Cart Inspection	disable/Dris g	Max Number attached emails (6)
Control Visibility Test Carl Survey	hideOris Q	Global Task Action On Insert
Launch <741> 741	launchForn	Enclo Disable Global Task Action On Expiration
Launch Test	launch/form Q	Enote Distor
LaunchCAR Corrective Action Reports	launchForn	ANE O
Pause Test	parantank Q	
TEST Case Label Survey	hideOtta	

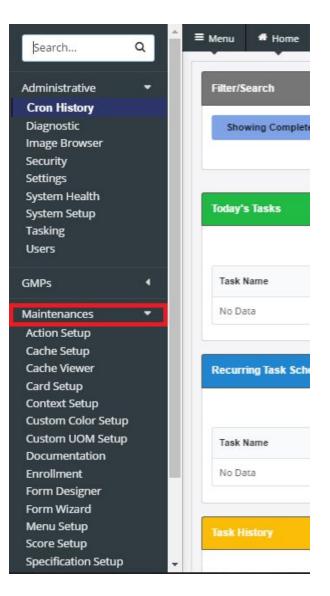
Save action when finished.

≣ Menu # Home 🎍 admin 📴 Aotion Briup			📓 🔳 Tasks 💶
Configured Actions	¢ -	Editing - Test Action	Ŵ
Search	+ Add New Aston	Action Type	
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	Q notical participation of the second	Groups	
	adjustSchedule Q	Select or Enter a New Action Group Name	·
711	ensit	То	
August 5th Test this is rorally a test Case Label Survey	enutip	Subject	
August 5th Test10	wpfaction		
August 5th Test2 Inspec.Cache.Reds	refreshCache		
August 5th Test3	pausettok	8/8 115 115	
August 5th Test4 Case Label Inspection	launchForm		
August 5th Test5 522	setOxWatue	Form Name:	
August 5th Test6 500	hideOtta	Control Name:	•
August 5th Test7 500	disableCtris		
August 5th Test8	clearEnrollment	Attach Form Pictures	
August 5th Test9	adjustSchedule	Attachment size limit in Mb (16)	
Control Readonly Test Cart Inspection	ÇektGetdecib	Max Number attached emails (6)	
Control Visibility Test Cart Survey	hideOrls 🖓	Global Task Action On Insert	
Launch <741> 741	launchForm	Enable Disable Global Task Action On Expiration	
Launch Test	launch?om Q	Enable Dicable	
LaunchCAR Corrective Action Reports	lauschPorn	BAVE @	

Cache Management

To get to the cache management select the <Menu> slide-out. Next, the <Maintenances> drop-down. Lastly, <Cache Setup>.





Search	Q	≡ Menu	f Home
Administrative	4	Filter/S	earch
GMPs	4	Shor	wing Complete
Maintenances	-		
Action Setup			
Cache Setup			
Cache Viewer		Today's	s Tasks
Card Setup			
Context Setup			
Custom Color Setup			
Custom UOM Setup		Task M	lame
Documentation			i i i i i i i i i i i i i i i i i i i
Enrollment		No Da	ta
Form Designer			
Form Wizard			
Menu Setup			
Score Setup		Recurr	ing Task Sche
Specification Setup			
QC Forms	4	Task M	lame
Sanitation Forms	4	No Da	ta
Test Plans	4		

Cache Setup

Role Permissions Needed						
Role Value	Role Name					
formAdmin	Form Administrator					

The Cache Setup screen allows the user to open existing caches, create new caches, edit existing caches, and view cache properties.

To create new cache,

Select <New Cache> from the submenu and select "Upload CSV".

E Menu # Home & admin Cache Setup	🗐 🛢 Tasks 🪺
New Cache 🍸 🏷 Open 🛛 Properties 🔨	
No cache loaded	
Demo Foods -> Plant 538 Connection Status: Connected	r1872 (inspec
	Cooper
E Menu # Home & admin Cache Setup	🗐 🗏 Tasks 🧻
New Cache 🔻 🍃 Open Properties *	
Upload CSV	
No cache loaded	
Demo Foods Plant 538 Connection Status: Connected	r1872 🔞 spec

Choose the desired CSV file for the cache from the file explorer. The file chosen will usually be a spreadsheet created for the purpose of a cache and saved as a CSV.

E Menu	© Open ← → ∽ ↑ → This PC → Desktop → Tests ∨ ♂	X Search Tests	🗐 🖻 Tasks 💿
No cache loaded Demo Foods > Plant 538 Connection Status: Connected	Organize Vew folder	■ • 11 (r1872 Wspec
	File name: 🗸 🗸	Custom Files ~ Open 👻 Cancel	

Select <Open Caches> from the cache setup submenu. Then, choose the desired cache from the populater field of existing caches.



cache loaded								
Open Cache								
Search	٩					Show 24 • ro	ows per page H 🔶 1 🔿 H	H
Cache75a Inspec.Cache I 18 rows II 134 rows		.Reds defMonths		defMonths_5		24 25 50	defYears	
						100		
		list 2 rows		test_7_5				

To import or export caches from (or to) a file, select <Properties>. From there, select either "Export to file" or "Import from file".

	admin DR Cache Setup Properties *	8	🛎 Tasks 🚺
No cache load	ded		
<u>Demo Foods</u> ⇒ Plant 538	Connection Status: Connected	r1872	(inspec
≡ Menu # Home New Cache ▼ ► Open	admin DE Cache Setup Properties *	8	🖺 Tasks 🚺
No cache load	 Export to file Import from file 		
Demo Foods → Plant 538	Connection Status: Connected	r1872	(inspec

Cache Viewer

The cache viewer requires the same permissions and access teps as the cache setup, with the exception that the user will select "Cache Viewer" rather than "Cache Setup".

≡ Menu 🐐 Home	admin 📴	Cache Viewer		🗏 Tasks 🚺
Cache				
Demo Foods	Connection Status:	ionnected	r1872	(inspec

Once in the cache viewer screen, use the drop-down to choose a cache to open and view.

Menu 🕈 Home 🍐 admin 💴	Cache Viewer	
iche		
ache75a	18 / 18 rows	
nspec.Cache.Reds	134 / 134 rows	
defMonths	15 / 13 rows	1
defMonths_5	14/13 rows	
defYears	6/6rows	
list	2/2 rows	

E Menu # Home & admin 00 Cache: Inspec.Cache.Reds	🗐 🛢 Tasks 🚺
Cache	
Inspec.Cache.Reds 134/134 rows Show 100 • rows	H ∉ 1 2 → H
Reds	
	Q
RED1	
RED2	
RED3	
RED4	
REDS	
RED6	
RED7	
RED8	
RED9	
RED 10	
RED11	
RED12	
RED 13	

Card Setup

Role Permiss	ions Needed
Role Value	Role Name
cardAdmin	Card Administrator

Custom Color Setup

Role Permissions Needed							
Role Value	Role Name						
systemAdmin	System Administrator						

The custom color feature can only be used by a user with administrator privileges.

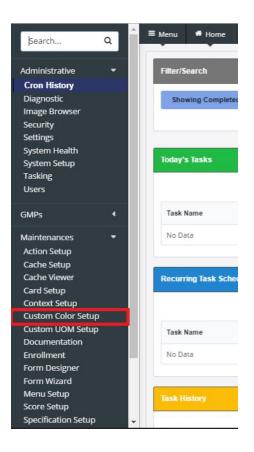
Select the <Menu> slide-out

Search	Q Î	≡ Menu	# Home	🌢 admin		Inspec	
Administrative	•	Filter/S	earch				
Cron History							
Diagnostic Image Browser Security Settings		Sho	wing Complet	ed			Showing All Use
System Health System Setup Tasking Users		Today's	s Tasks				
GMPs	•	Task M	Name		Form Name		Status
Maintenances Action Setup Cache Setup Cache Viewer	•	No Da					
Card Setup Context Setup Custom Color Setup		Recurr	ing Task Sch	edules			
Custom UOM Setup Documentation		Task M	Name			Form Na	me
Enrollment Form Designer Form Wizard		No Da	ita				
Menu Setup Score Setup		Task H	istory				
Specification Setup							

Select the <Maintenances> Drop-down

Search	۹	≜ Menu	🕈 Home	🌡 admin		Inspec	
Administrative Cron History Diagnostic Image Browser Security	•		Search wing Complet	ed		S	howing All Users
Settings System Health System Setup Tasking Users		Today	's Tasks				
GMPs	•	Task	Name		Form Name		Status
Maintenances Action Setup Cache Setup Cache Viewer Card Setup	•	No D	ata ring Task Sch	edules			
Context Setup Custom Color Setup Custom UOM Setup Documentation Enrollment Form Designer		Task No D	Name ata			Form Name	
Form Wizard Menu Setup Score Setup Specification Setup		Task F	listory				

Select <Custom Color Setup>



First, add the color name desired. Next, select the desired color from the color pallette. Then select the <Add New Color> button to register the new color and move onto the next input.

≡ Men	iu 希 H	Home	🌢 admin		Custom Colo	r Setup				Ð	■ Ta	isks 🚺	1
Cu	stom	Colo	r Setup	þ			_				٥	•	
Cold	or Name						Color Value						
Ente	er New Col	lor:											
k	olor Name	<u></u>					Color		+ Add New Color				
_													
Demo P	- oods → P	Plant 538	Connect	ion Status: C	onnected					r1855	(1)	spec	100

≡ Menu	# Home	占 admin	Custom Color Setup			8	🖥 Tasks	
Custom co					Color Value Color Color Add New Color	1 r1859	¢	ρec
	Define Custom Color		Sat: 0 Green Color/Solid Lum: 0 Blue Add to Custom Colors	n: 0 e: 0				

Custom Colo	r Setup		\$
Color Name		Color Value	
inter New Color:			
NewColor1		Color	+ Add New Color

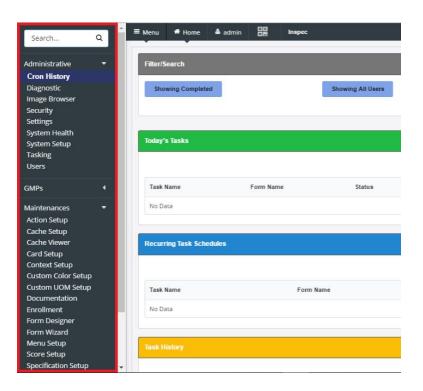
Custom UOM Setup

Role Permiss	ions Needed
Role Value	Role Name
systemAdmin	System Administrator

The custom UOM (Unit Of Measure) setup can be used when the user wishes to add a form unique UOM that is not already known by the system. A UOM can be something like a box, that does not have a specific

measure behind it.

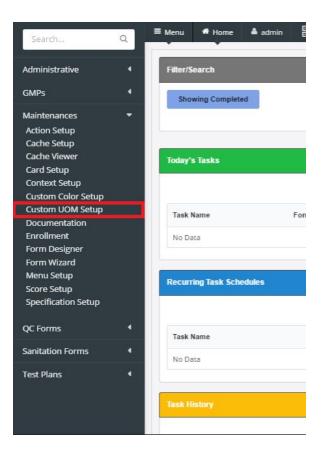
Select the <Menu> slide-out



Select the <Maintenances> Drop-down.

Search	۹	≡ Menu 1	Home 🍐	admin 📴	Inspec	
Administrative Cron History Diagnostic Image Browser Security	•	Filter/Sear	ch g Completed	1		Showing All Users
Settings System Health System Setup Tasking Users		Today's Ta	isks			
GMPs	•	Task Nam	e	Form Name	•	Status
Maintenances Action Setup Cache Setup Cache Viewer	•	No Data Recurring	Task Schedule	5		
Card Setup Context Setup Custom Color Setup Custom UOM Setup Documentation Enrollment Form Designer Form Wizard		Task Nam No Data	e		Form Nam	ie
Menu Setup Score Setup Specification Setup	•	Task Histo	ny			

Select <Custom UOM Setup>



Select <Add New Category>, name the new category, and press <OK>

≡ Menu # Home ▲ admin DC Custom	Mot	🗏 Tasks 🚺
Custom UOM Setup 🌩 🔹		
Demo Foods Plant 538 Connection Status: Connected	1859	(in) spec
≡ Menu # Home & admin	MOL MOL	🗏 Tasks 🕕
Custom UOM Setup 🌞 👻	Add New Category: Enter Name New Category 1 OK CANCEL	
Demo Foods	/1859	(inspec

Select the new category created by the user.

≡ _{Menu}	# Home	🌢 admin		Custom	uom		🗏 Tasks 🧕
_	om UOI dd New Catego		¢	•	Category - New Category 1		Û
New Ca	ategory 1				Add Custom UOM + New UOM		
Demo Food	ds → Plant 538	Connecti	on Status: C	onnected		r1859	(inspec

Select <New UOM>

Custom UOM S	Setup 🌣	•	Category - New Category 1	
+ Add New Category New Category 1	ļ		Add Custom LIOM	

Add the custom UOM desired by the user. Next, select <OK>.

E Menu & Home & admin R Custom Custom UOM Setup * • Add New Category New Category 1	Category - Nour Cotogon 1 Inspec × Add Custom UON + New UOM	■ Tasks ■
Demo Foods -> Plant 538 Connection Status: Connected	OK CANCEL	

To delete custom UOMs, perform all steps up to selecting the category desired. Then select the category or UOM that is being deleted and select the trash can icon.

≡ Menu	# Home	占 admin		Custon	uom		🛎 Tasks 🧕
+ Ac	OM UOI Id New Catego I Category 1	M Setup	\$	•	Category - New Category 1 Add Custom UOM + New UOM Crate		Û
Demo Food	ls → Plant 538	Connecti	on Status: (Connected		r1859	(in)spec

Inspec Documentation Editor

Role ⁵ Role Permiss	ions Needed
Role Value	Role Name
formAdmin	Form Administrator

Menu Setup

Role Permissions Needed					
Role Value	Role Name				
formAdmin	Form Administrator				

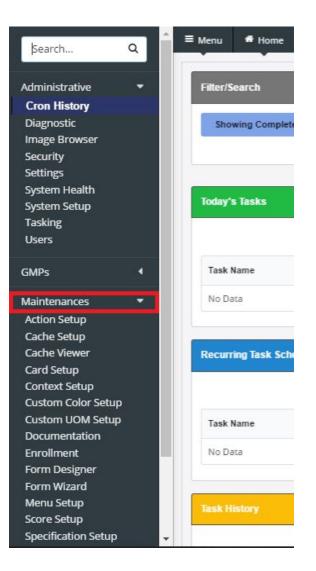
The Menu Setup allows the user to make changes to the menu slide-out tab and how it is specifically organized. The user can create new dropdowns and place other dropdowns, or forms, in subsections of these. Users may also place dropdown menus or forms in duplicate locations.

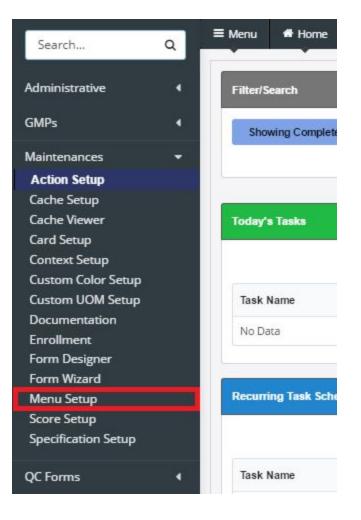
To get to the Menu Setup select the <Menu> slide-out.

Next, the <Maintenances> drop-down.

Lastly, <Menu Setup>.

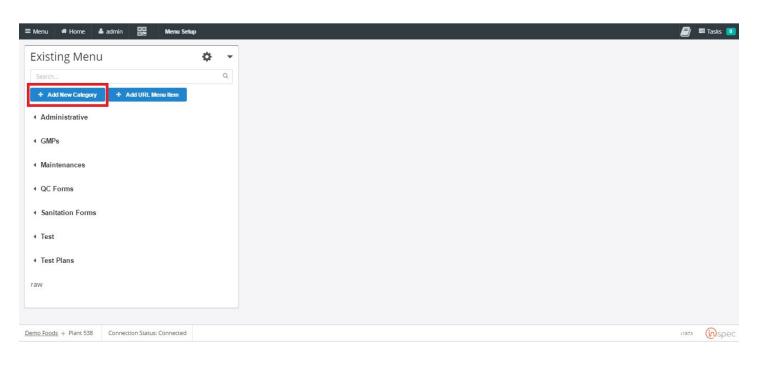
Şearch	٩	Ê M	nu 🕈 Home	🌢 admin	Inspec				
Administrative	-	F	lter/Search						Search
Cron History Diagnostic			Showing Comple	ted	Showing All Users	Simple Time	Full Time	Added	Due Date





To create a new menu slot,

Select <Add new Category>



Next, name the new category.

≡ Menu # Home 🌢 admin 📴 🕴	Wenu Setup					🗐 🖻 Tasks 📵
Existing Menu	¢ •	-				
Search	٩	Inspec		×		
+ Add New Category + Add URL Menu	Item	Add New Category: Enter Nar	ne			
Administrative			ок	CANCEL		
∢ GMPs			Űĸ	CANCEL		
Maintenances						
QC Forms						
Sanitation Forms						
< Test						
 Test Plans 						

Select a category for your item to reside in. This could be "Main" and the menu item will shot up on the main menu slide-out. The user can also choose to place the menu item under an existing menu item.

≡ Menu 👫 Home 🌢 admin 🔤 M	Menu Setup		🧾 🖺 Tasks 🚺
Existing Menu	¢ -	Edit Menu Item	Û
Search	Q	Name	
		Test Menu	
+ Add New Category + Add URL Menu	Item	Category	
 Administrative 		main	
Auministrative		Select Category	* I
∢ GMPs		Roles	
		Not in any role	
 Maintenances 		Role Name	+ Add Role
		Context	
QC Forms		All Contexts	
		Select Context	•
Sanitation Forms			
Test Menu		Sorting Index Need to select the category, set an index value, then press Add.	
reat meno		Select Category •	
✓ Test Plans			
		Enter index	
		+ Add	
		SAVE 🥺	

Now select the roles to assign to the menu item, hit <Add Role> to complete. This will regulate who can see the item and make changes. If no role is selected, the menu item will be open to all users.

≣ Menu 希 Home 🍐 admin 🛄	Menu Setup		🗐 🗏 Tasks 🚺
Existing Menu	¢ -	Edit Menu Item	Ŵ
Search	Q	Name	
		Test Menu	
+ Add New Category + Add URL	Menu Item	Category	
 Administrative 		main	
		Select Category	÷
✓ GMPs		Roles	
		Not in any role	
 Maintenances 		Role Name	+ Add Role
100 B B 100 B			
 QC Forms 		All Contexts	
 Sanitation Forms 		Select Context	
		Sorting Index	
Test Menu		Need to select the category, set an index value, then press Add.	
		Select Category •	
 Test Plans 		Enter index	
		Enterindex	
		+ Add	
		SAVE 🥹	

Select a sorting index and an index value for the menu item, hit <Add> to complete.

≣ Menu # Home 🌢 admin 💷 Menu Setup			🗐 🗏 Tasks 🚺
Existing Menu 🌣	-	Edit Menu Item	Û
Search	Q	Name	
		Test Menu	
+ Add New Category + Add URL Menu Item		Category	
Administrative		main	
Auminisuauve		Select Category	•
		Roles	
		Not in any role	<u> </u>
 Maintenances 		Role Name	+ Add Role
		Context	
QC Forms		All Contexts	
 Sanitation Forms 		Select Context	•
		Sorting Index	
Test Menu		Need to select the category, set an index value, then press Add.	
		Select Category •	
Test Plans			
		Enter index	
		+ Add	
		SAVE 🥹	

Save the menu created.

≡ Menu 希 Home 🎍 admin 💷	Menu Setup		🧾 🗏 Tasks 🚺
Existing Menu	¢ -	Edit Menu Item	Û
Search	Q	Name	
		Test Menu	
+ Add New Category + Add URL Me	enu item	Category	
 Administrative 		main	
		Select Category	Ť.
✓ GMPs		Roles	
		Not in any role	
 Maintenances 		Role Name	+ Add Role
		Context	
 QC Forms 		All Contexts	
 Sanitation Forms 		Select Context	•
		Sorting Index	
Test Menu		Need to select the category, set an index value, then press Add.	
		Select Category •	
 Test Plans 			
		Enter index	
		+ Add	
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To add a URL driven menu item, follow the procedure for a nonURL driven menu. With the additional steps of adding the desired URL in.

≡ Menu # Home 🎍 admin 🛄 Menu Setup	P		🗐 🖴 Tasks 🛄
Existing Menu	¢ -	Edit Menu Item	Û
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		Test Menu	
+ Add New Category + Add URL Menu Item		Category	
 Administrative 		main	
		Select Category	
 GMPs 		Roles	
		Not in any role	_
 Maintenances 		Role Name	+ Add Role
		Context	
QC Forms		All Contexts	
Sanitation Forms		Select Context	-
• Santation Forms		Sorting Index	
Test Menu		Need to select the category, set an index value, then press Add.	
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Now test the URL.

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n		
	main	
	Select Category	27
	Roles	
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	Parting Index	
	Need to select the category, set an index value, then press Add.	
	Select Category *	
	Enter index	
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	Open Style	
	New Tab/Page Same Page	
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		C Name Test Manu Category min Select Category Not in any role Tot in any role Select Context Select Context

Now select the URI opening style. Either open in new browser window or to open in the existing browser window.

≡ Menu & Home 🎄 admin 📴 Menu Setup			E Tasks
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Demo Foods + Plant 538 Connection Status: Connected			nava (Mispec

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Save the menu created.

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