




Inspec User Guide


ver.2020-MAR

User Administration

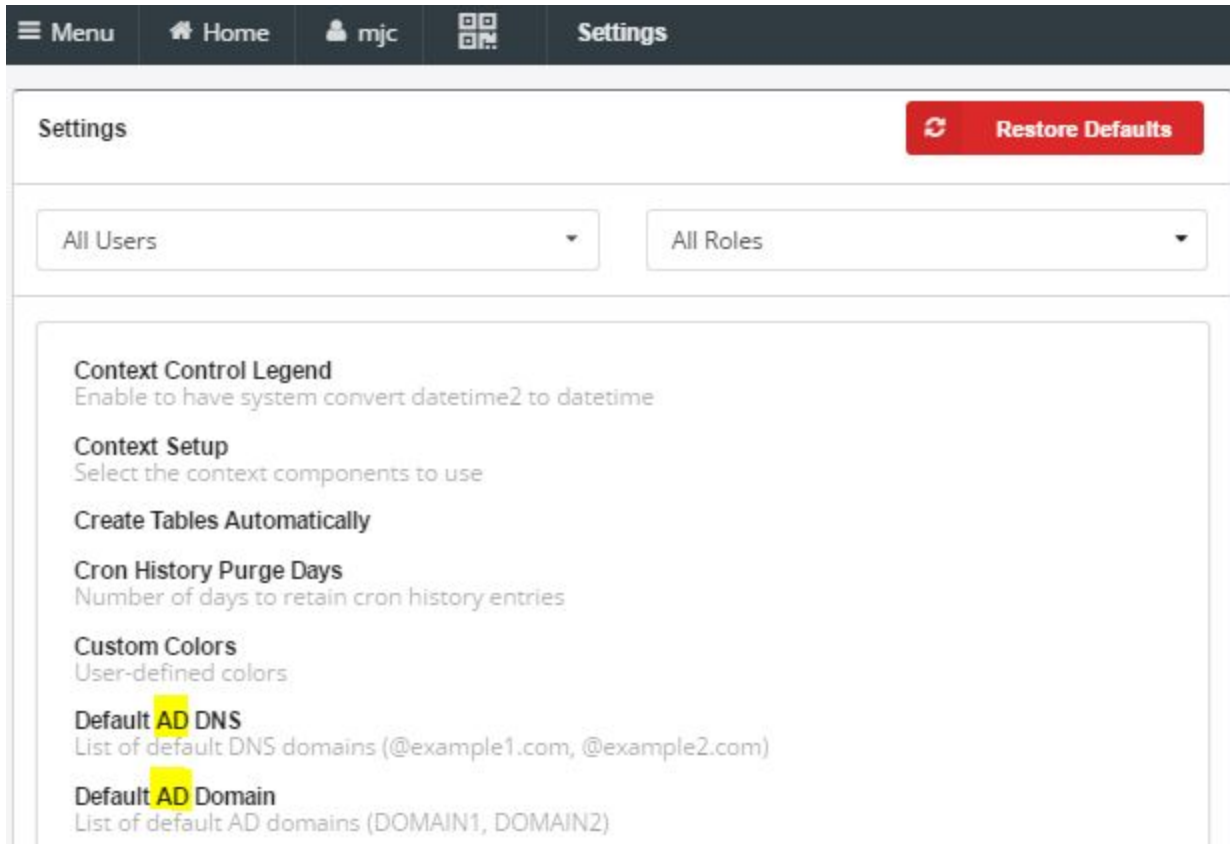
Role Management

 Admin Roles		
Role Value	Role Name	Role Functions
approvalAdmin	Approval Administrator	Access to: Admin Form Review page Functions: Allows user to approve forms
cardAdmin	Card Administrator	Access to: Card Setup page under Maintenance Functions: Allows user to edit and create card layouts
userAdmin	User Administrator	Access to: Admin User and Admin Form Review pages Functions: Adding and editing users, groups, and approve forms
taskAdmin	Task Administrator	Access to: Admin user page and task page Functions: Allows users to assign tasks to users
formAdmin	Form Administrator	Access to: Action, Form Designer, Documentation, and Cache pages Functions: Allows users to create new forms in the designer.
systemAdmin	System Administrator	Access to: Administration and maintenance pages Functions: Maintain and access Inspec settings
menuAdmin	Menu Administrator	Access to: Menu page under Maintenance Functions: Allows user to edit menu
dataAdmin	Data Administrator	Access to: Form pages Functions: Allow users to reopen forms and access older data
deleteAdmin	Delete Administrator	Access to: Form pages Functions: Allows users to delete a form
contextAdmin	Context Administrator	Access to: Context page under Maintenance Functions: Allows user to create, edit, and remove

		context
cacheAdmin	Cache Administrator	Access to: Cache Setup page under Maintenance Functions: Allows user to create, edit, and remove caches
bugAdmin	Bug Administrator	Access to: Bug Review Page Functions: Allows user to review and send bugs to Coolearth Software

 <h2>Other Roles</h2>		
Role Value	Role Name	Role Functions
user (default)	User	Access to: Form pages Functions: Default role. Create and fill out forms
GlobalStickyRole	Global Sticky Role	Access to: Form pages Functions: Allows user to save control values to be used again
reopenFormsRole	Reopen Form Role	Access to: Form pages Functions: Allows users to reopen forms
reopen1hr	Reopen forms roles	Access to: Form pages Functions: Allows user to reopen a form within 1 hour of finishing the form

Windows Active Directory (A/D) User Authentication



Settings

Restore Defaults

All Users

All Roles

Context Control Legend
Enable to have system convert datetime2 to datetime

Context Setup
Select the context components to use

Create Tables Automatically

Cron History Purge Days
Number of days to retain cron history entries

Custom Colors
User-defined colors

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

Default AD Domain
List of default AD domains (DOMAIN1, DOMAIN2)

Environment Settings:

- ldap_servername
- ldap_extended

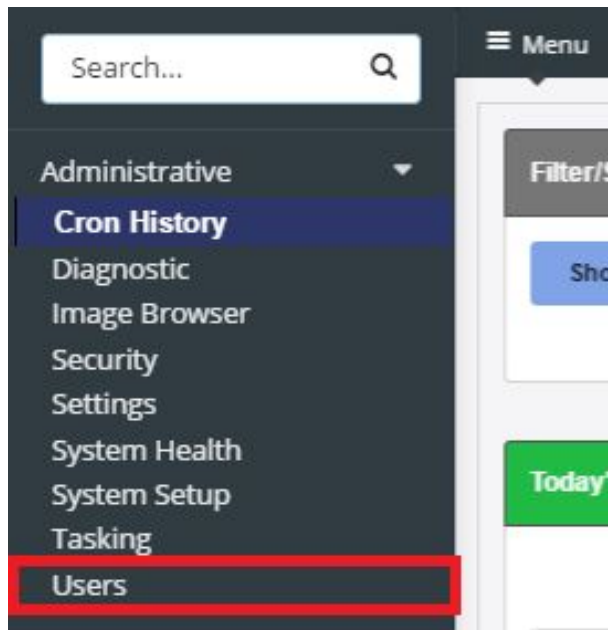
How to Add, Setup and Configure Users

Role Permissions Needed

You need to login 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.

The screenshot shows the "User Maintenance" interface. At the top, there are navigation tabs: "Editing User Maintenance", "Edit User Context Maintenance", "Edit User Enrollment", and "Edit Kiosks". Below this is the "Add/Edit User" form with fields for Username (J.Doe), Full Name (John Doe), Email (john.Doe@example.local), and Password. A "Save" button and a "Bulk Import New Users" button are also visible. Below the form is a table of existing users with columns for Username, Full Name, and Email. Each row has a set of action buttons: Edit User, Remove, Reset Password, Send Enrollment Email, Change Context/Roles, and Make Kiosk.

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

Menu Home admin User Maintenance Tasks 0

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

Add/Edit User

Username: TEST TOM Full Name: TEST TOM JOE Email: ZIPPY@ZIPPY.COM Password:

Save Cancel Bulk + Import New Users

Show 25 rows per page

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

Demo Foods → Plant 538 Connection Status: Connected r1879 inspec

Menu Home admin User Maintenance Tasks 0

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

Select Context To Assign

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

Add Users To Context Remove Users From Context Reset To Default

Select Context

Show 25 rows per page

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

Demo Foods → Plant 538 Connection Status: Connected r1879 inspec

Select Context To Assign

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

Add Users To Context Remove Users From Context Reset To Default

Select Context

Show 25 rows per page

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

User Enrollment

CSV E-Mail List

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

Send Enrollment Emails

Show 25 rows per page

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

Menu Home admin User Maintenance Tasks

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

User Enrollment

CSV E-Mail List
Example: user1@inspec.com, user2@inspec.com

Send Enrollment Emails

Show 25 rows per page

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

Demo Foods → Plant 538 Connection Status: Connected r1879 inspec

Menu Home admin User Maintenance Tasks

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

Logged Out Kiosks

Device ID

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

Active Kiosks & Devices

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

Recent Authentication Requests

Device ID	Seen	Token	Kiosk Binding	User Binding
No recent requests				

Demo Foods → Plant 538 Connection Status: Connected r1879 inspec

Add a list of Users via the Import process

Bulk

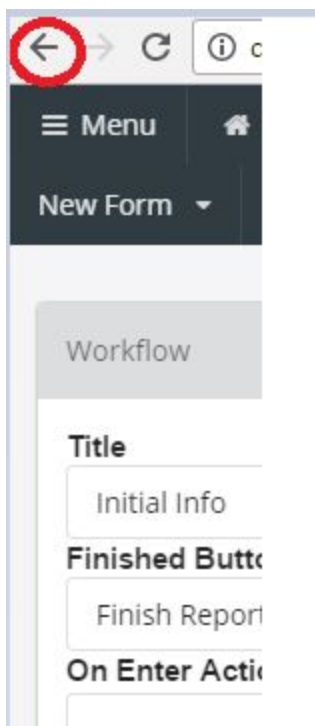
+ Import New Users

How to Configure a User

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

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

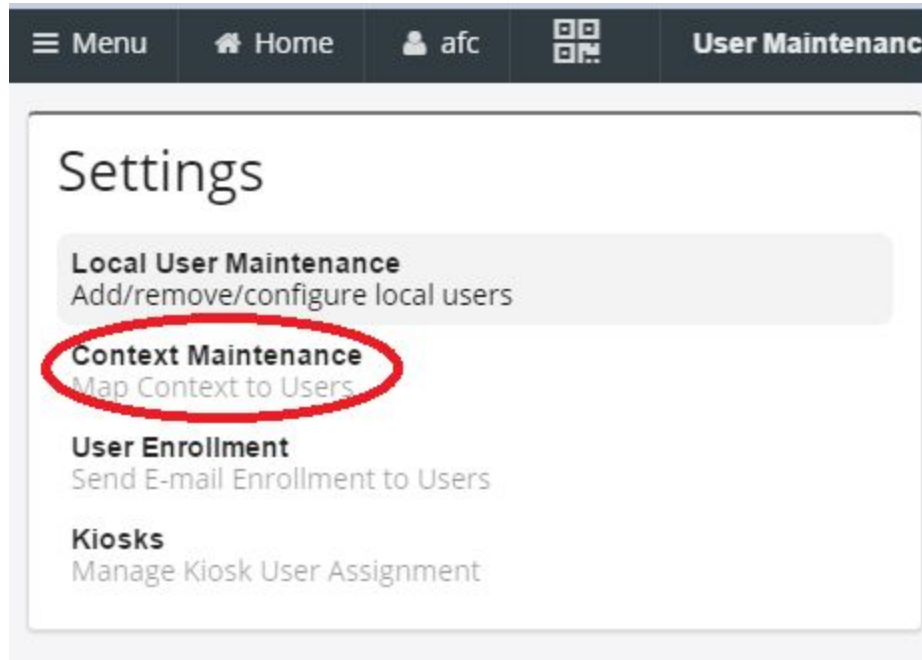
When you are finished, return to the User Maintenance screen by pressing the back arrow (←) in the upper left hand corner of the browser window.



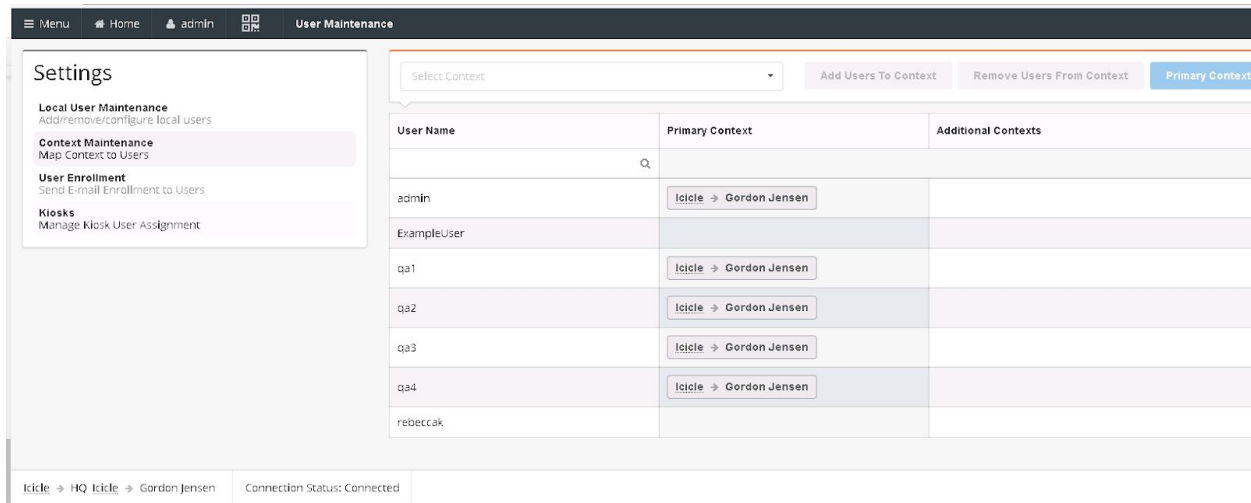
User Context Administration

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

Context Maintenance screen.



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

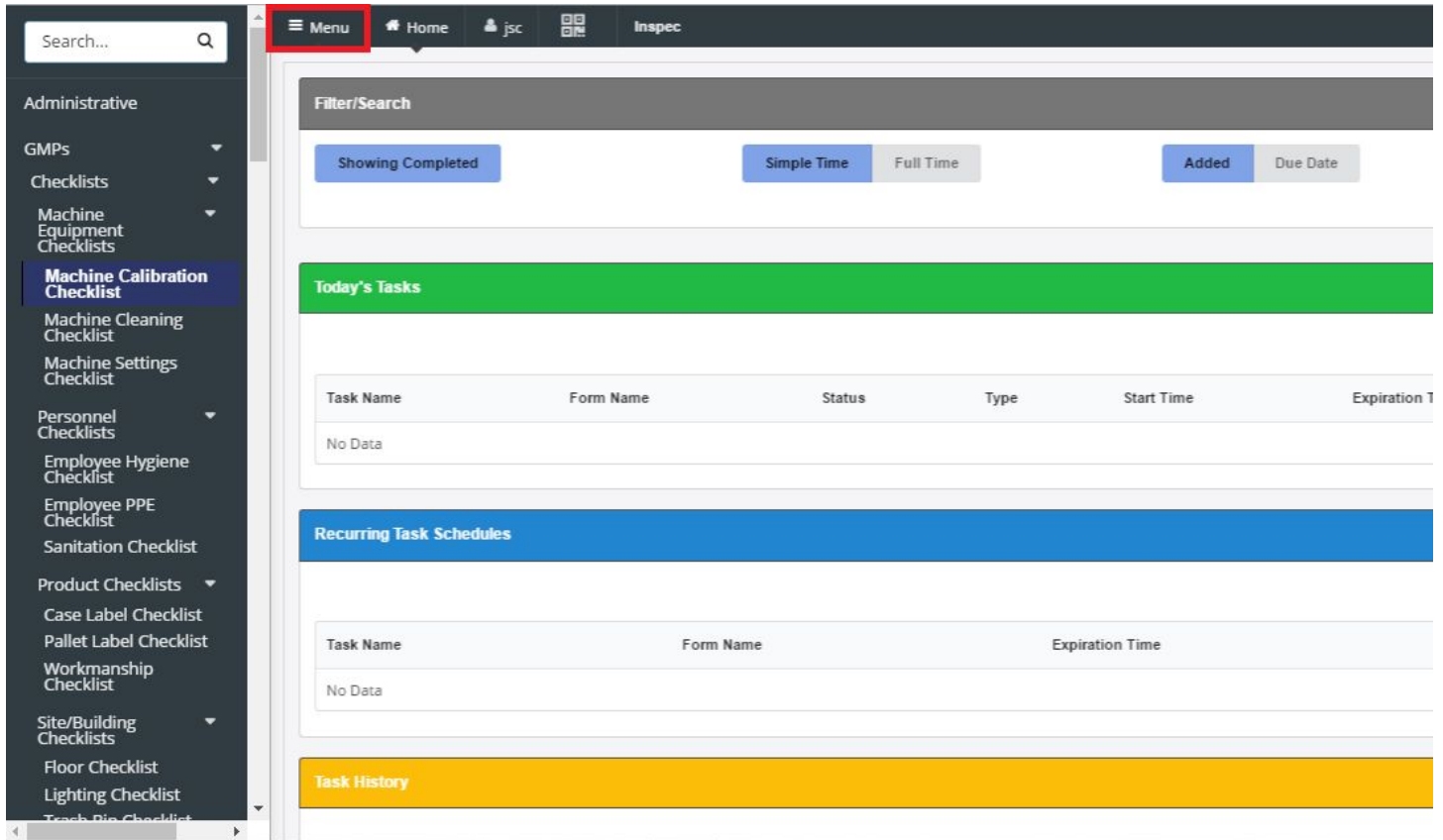


Password Resetting

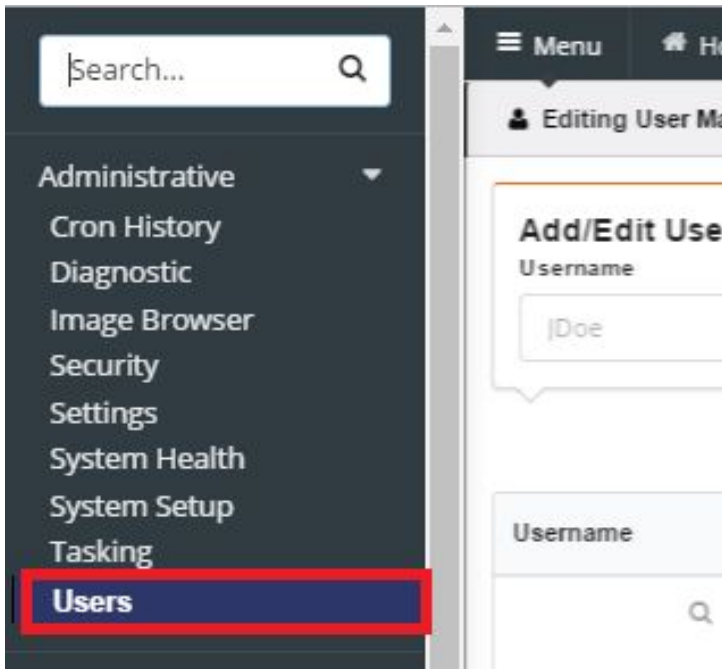
When the user wishes to reset their password they can do so as an administrator. A user can not reset a password if they do not have administrator privileges.

To reset a user's password,

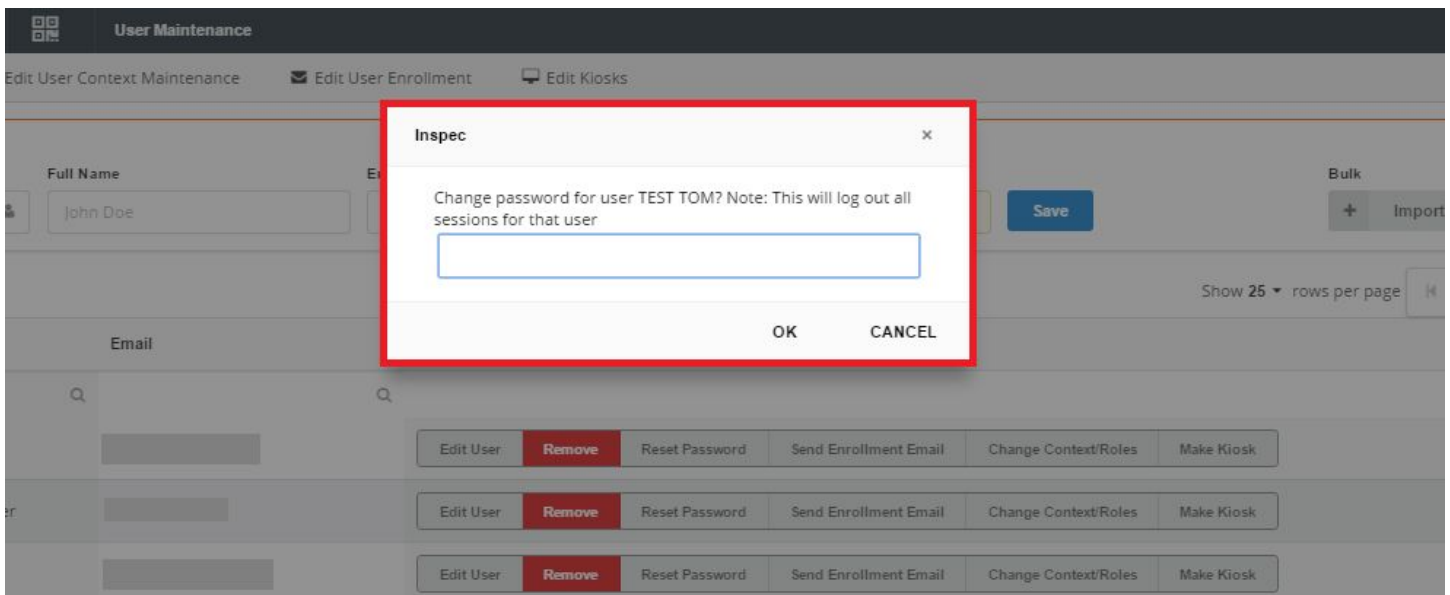
Select the <Menu> slide-out from the top menu bar.

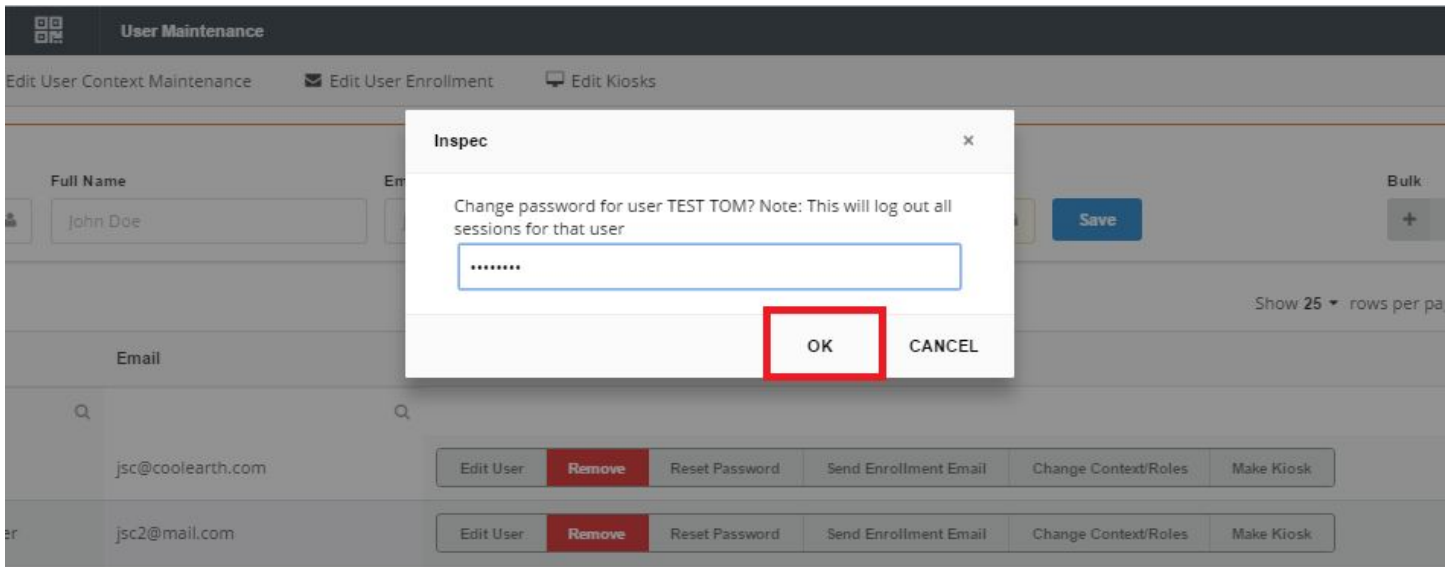


Select the <Users> option from the administrative drop-down.




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






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


User Context Maintenance

 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... 

Menu Home admin  Inspec

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

GMPs ◀


Maintenances ◀

Filter/Search

[Showing Completed](#)

Today's Tasks

Task Name	Form Name
No Data	


Search... 

Administrative ▼

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

GMPs ◀

Maintenances ◀

Menu Home admin  Inspec

Filter/Search

Showing Completed

Today's Tasks

Task Name	Form Name
No Data	

Menu Home admin **User Maintenance** Tasks 0

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

Add/Edit User

Username: Full Name: Email: Password:

Show 25 rows per page

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

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

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

Select Context:

Buttons: Add Users To Context, Remove Users From Context, Primary Context, Reset To Default

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

Select context to assign in the drop-down submenu.

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

Select Context:

- Demo Foods
- United Creations
- Tuna
- 419
- SITE
- UC1
- Site1

Buttons: Add Users To Context, Remove Users From Context, Primary Context, Reset To Default

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

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.

The screenshot shows the 'User Maintenance' interface. At the top, there are navigation tabs: 'Edit User Maintenance', 'Editing User Context Maintenance', 'Edit User Enrollment', and 'Edit Kiosks'. Below the tabs, there is a section titled 'Select Context To Assign' with a dropdown menu currently showing 'United Creations'. To the right of this section are four buttons: 'Add Users To Context', 'Remove Users From Context', 'Primary Context', and 'Reset To Default'. Below this is a table with columns: 'Select User', 'User Name', 'Primary Context', and 'Additional Contexts'. The table contains several rows of user data, with the row for user 'rmp' highlighted in red. The 'Primary Context' for 'rmp' is '419'. Other users listed include 'admin', 'jsc', 'jsc2', 'TEST TOM', 'testenroll', and 'united7221'.

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

Adding user(s) to a context.

Menu Home admin User Maintenance Tasks 0

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

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

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

Show 25 rows per page

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

Setting primary contexts.

Menu Home admin User Maintenance Tasks 0

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

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

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

Show 25 rows per page

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

Resetting to Default

Menu Home admin User Maintenance Tasks 6

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

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

419 → black

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

Show 25 rows per page

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

Menu Home admin User Maintenance Tasks 6

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

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


419 → black

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

Show 25 rows per page


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

User Enrollment Maintenance

 Role Permissions Needed	
Role Value	Role Name
userAdmin	User Administrator

Group Management

Users

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

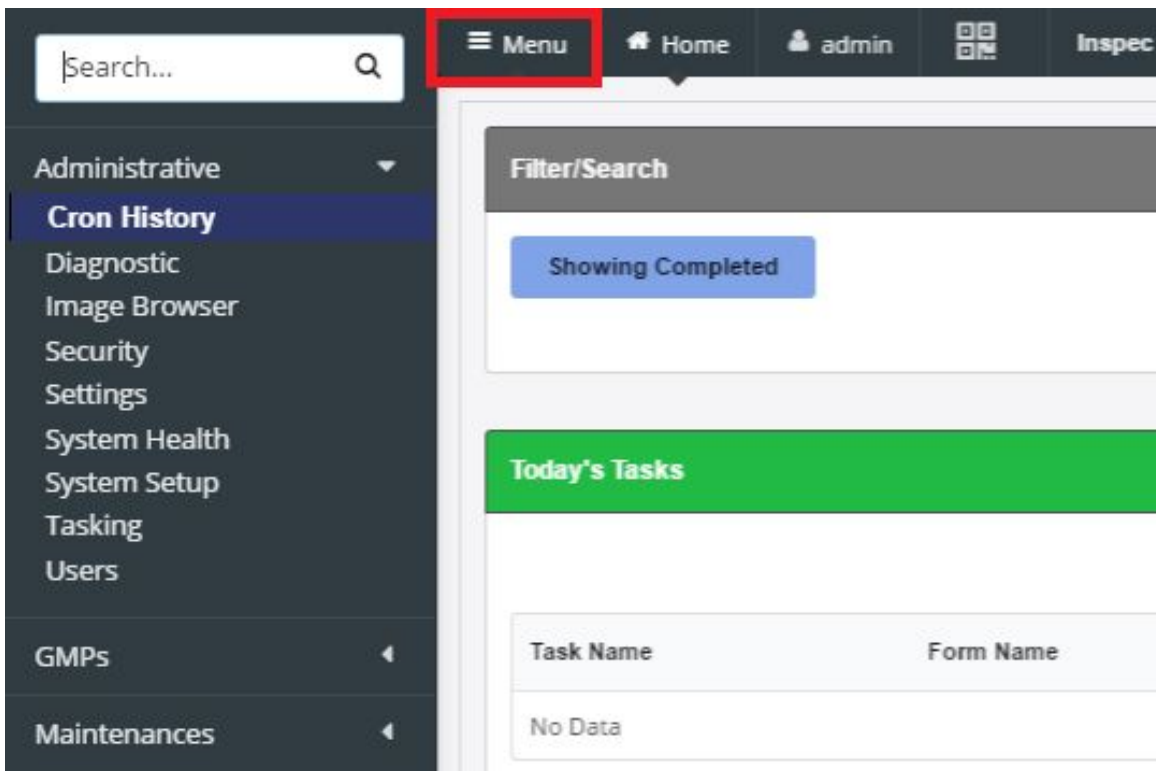
Other Roles:

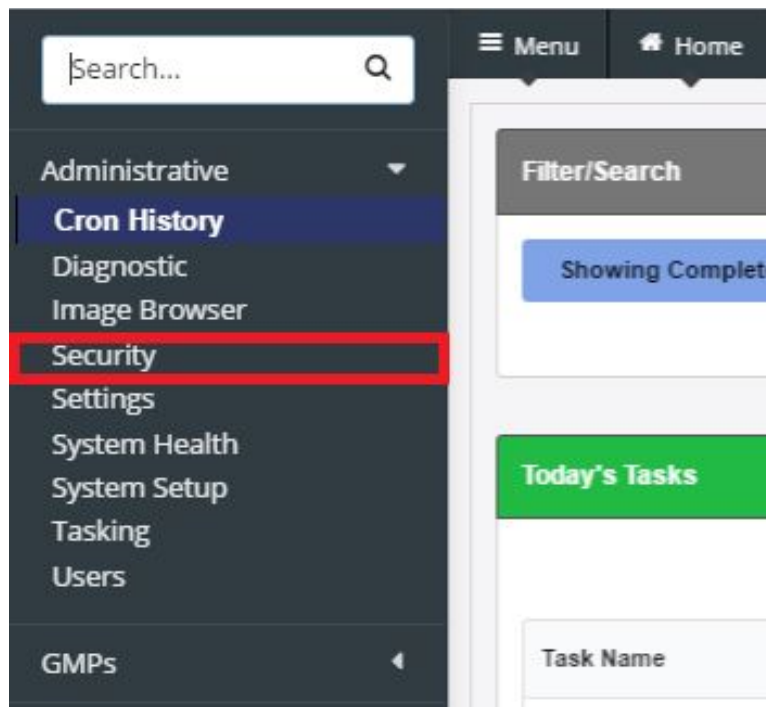
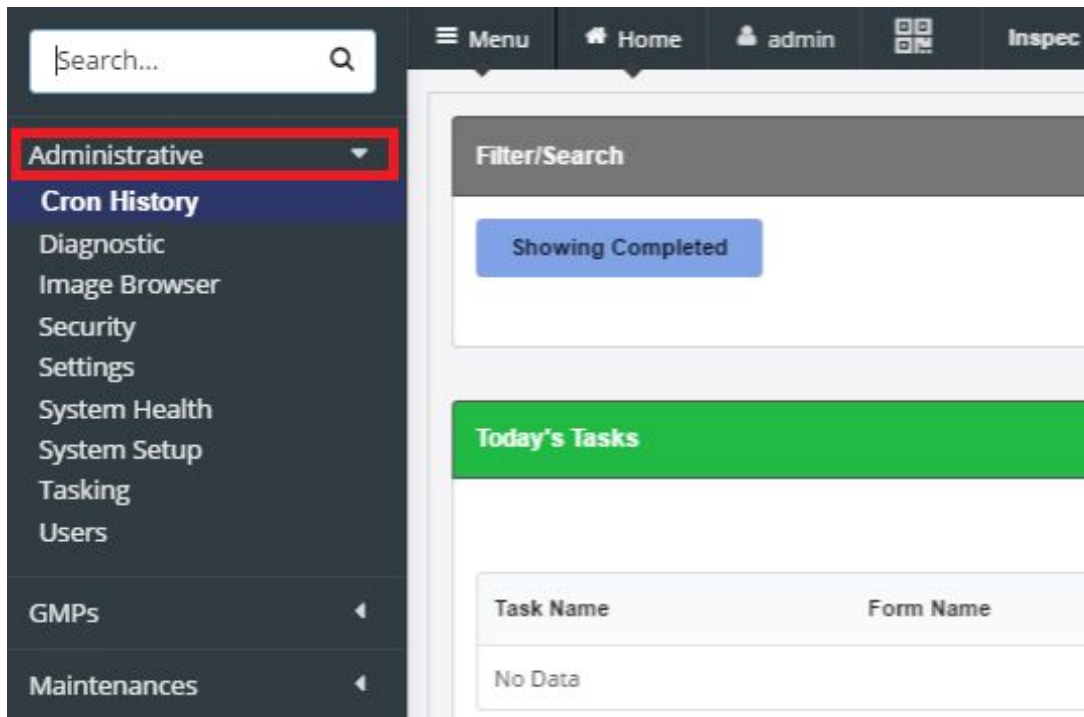
- User (Default)
 - reopen forms
- Global Sticky Role (Thumb-tack feature)

- Reopen Forms Role (make this a super-cede to the "reopen forms" role.)
- Approval Role (make this a super-cede to the "approver" role.)

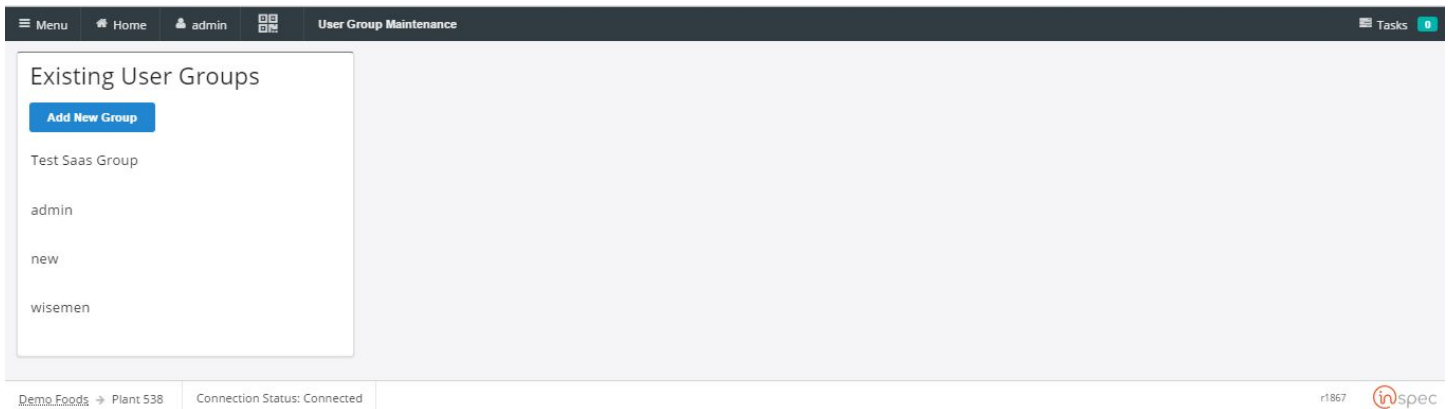
See the “Security Window”

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





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



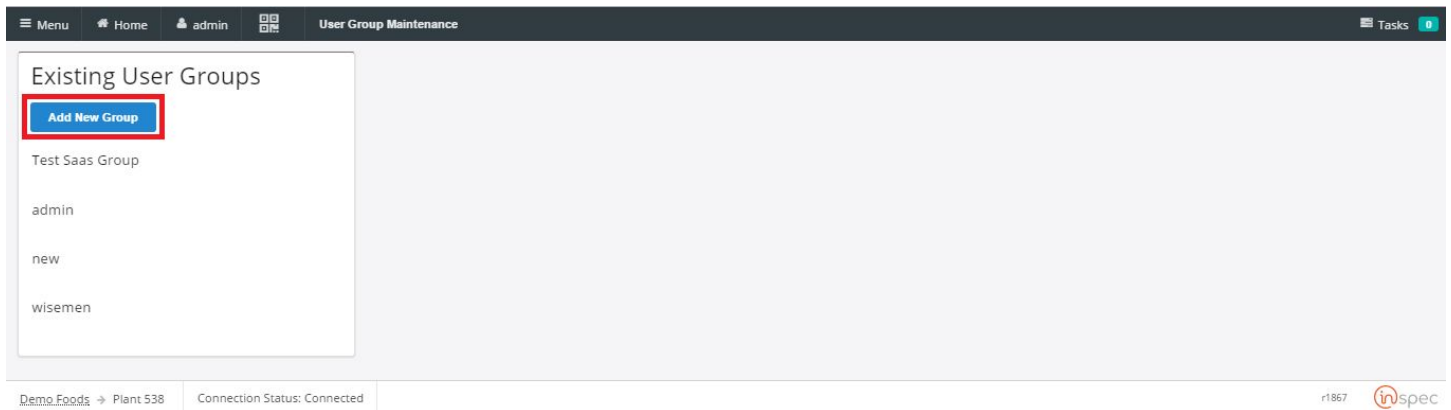
The screenshot shows a web application interface for 'User Group Maintenance'. At the top, there is a navigation bar with 'Menu', 'Home', 'admin', and 'User Group Maintenance' (the current page). A 'Tasks' indicator shows 0 tasks. The main content area is titled 'Existing User Groups' and contains a blue 'Add New Group' button. Below the button, a list of existing groups is displayed: 'Test Saas Group', 'admin', 'new', and 'wisemen'. At the bottom of the page, there is a breadcrumb trail 'Demo Foods > Plant 538', a 'Connection Status: Connected' indicator, and a version number 'r1867' next to the 'inspec' logo.

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

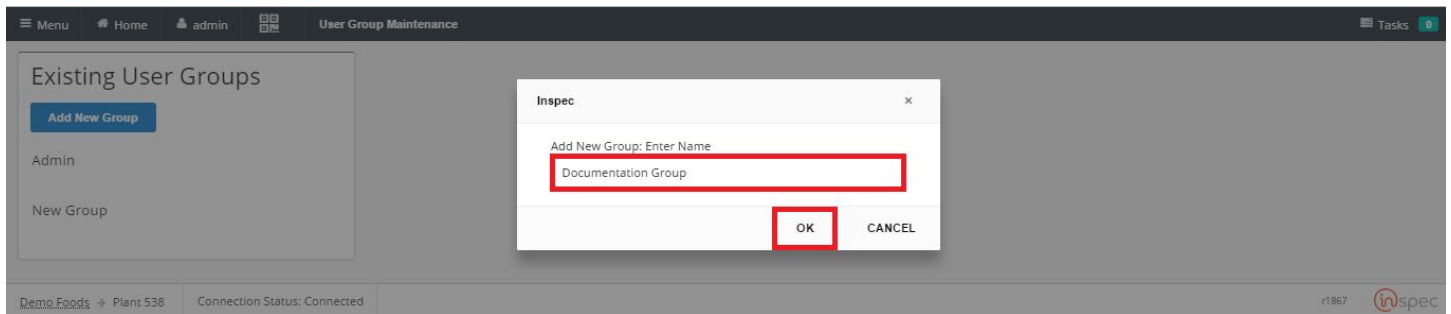
Group Administration

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

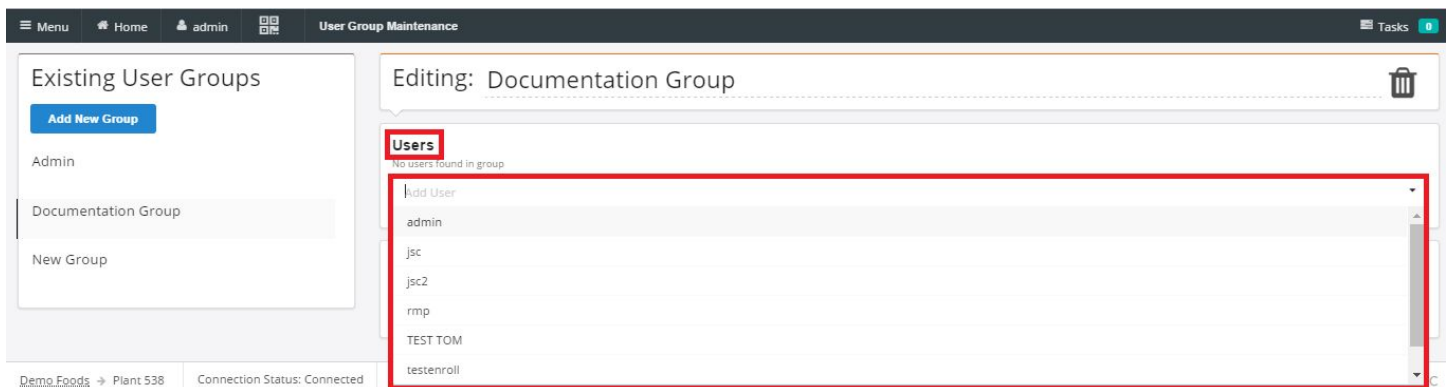
To create a new group, select <Add New Group>



Enter a group name, and select <OK>.



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



Existing User Groups

- Add New Group
- Admin
- Documentation Group
- New Group

Editing: Documentation Group

Users

admin x • TEST TOM x

Add User

Roles

Does not have Roles

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

Demo Foods → Plant 538 | Connection Status: Connected | r1867 inspec

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

Existing User Groups

- Add New Group
- Admin
- Documentation Group
- New Group

Editing: Documentation Group

Users

admin x • TEST TOM x

Add User

Roles

Does not have Roles

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

- admin
- approver
- bindall
- cardAdmin
- CHEROKEE117
- CHEROKEE117A

Demo Foods → Plant 538 | Connection Status: Connected | r1867 inspec

Existing User Groups

- Add New Group
- Admin
- Documentation Group
- New Group

Editing: Documentation Group

Users

admin x • TEST TOM x

Add User

Roles

admin x • cardAdmin x

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

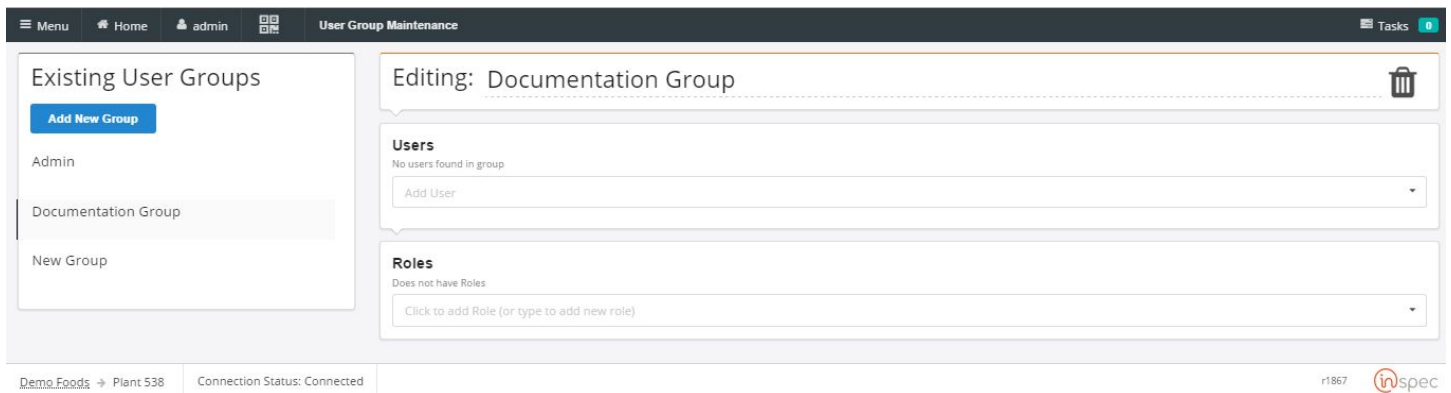
Demo Foods → Plant 538 | Connection Status: Connected | r1867 inspec

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

How to Edit a Group

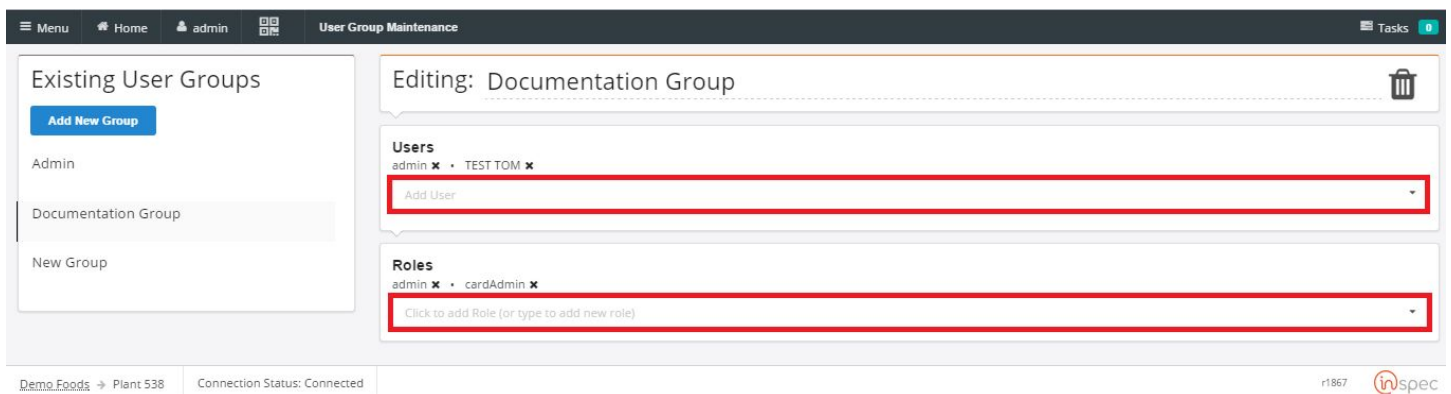
Once in the groups screen, the user can select an existing group by selecting the name of the desired existing group.

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



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.



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

Menu Home admin User Group Maintenance Tasks 0

Existing User Groups

Add New Group

Admin

Documentation Group

New Group

Editing: Documentation Group

Users

admin x • TEST TOM x

Add User

Roles

admin x • cardAdmin x

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

Demo Foods → Plant 538 Connection Status: Connected r1867 inspec

How to Delete a Group

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

Menu Home admin User Group Maintenance Tasks 0

Existing User Groups

Add New Group

Admin

Documentation Group

New Group

Editing: Documentation Group

Users

admin x • TEST TOM x

Add User


Roles

admin x • cardAdmin x

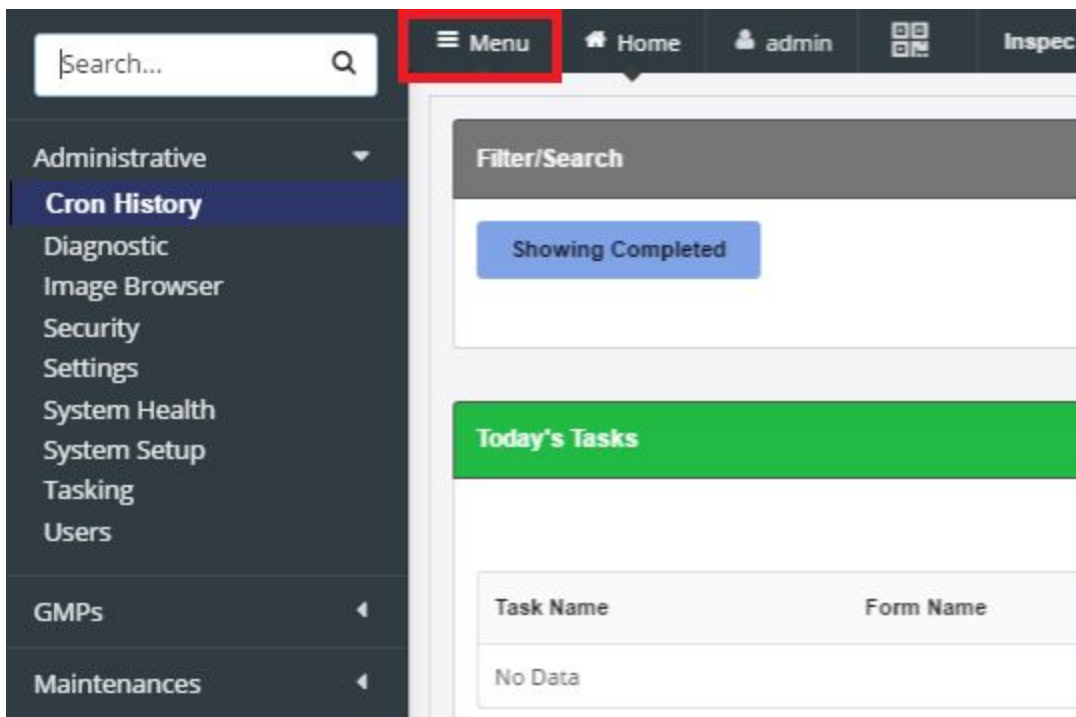
Click to add Role (or type to add new role)

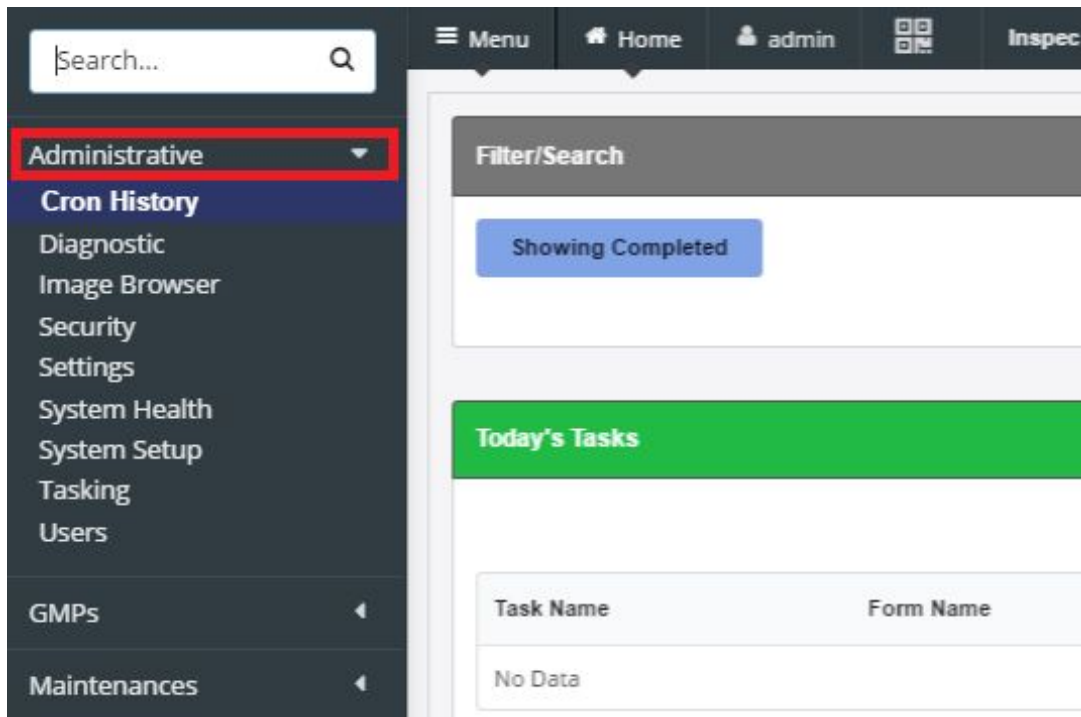
Demo Foods → Plant 538 Connection Status: Connected r1867 inspec

Tasking Management

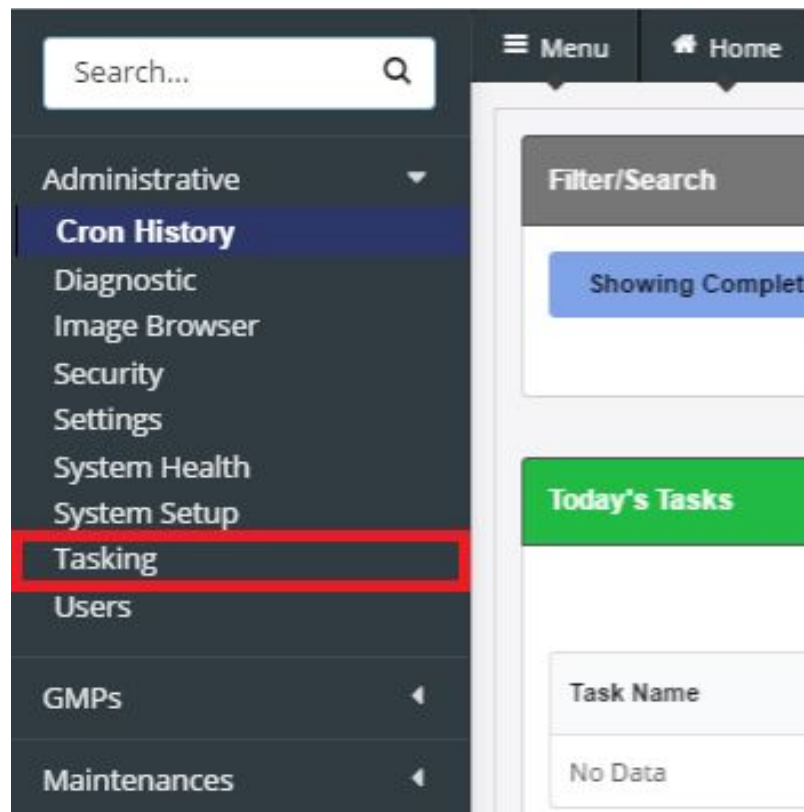
 Role Permissions Needed	
Role Value	Role Name
formAdmin	Form Administrator

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

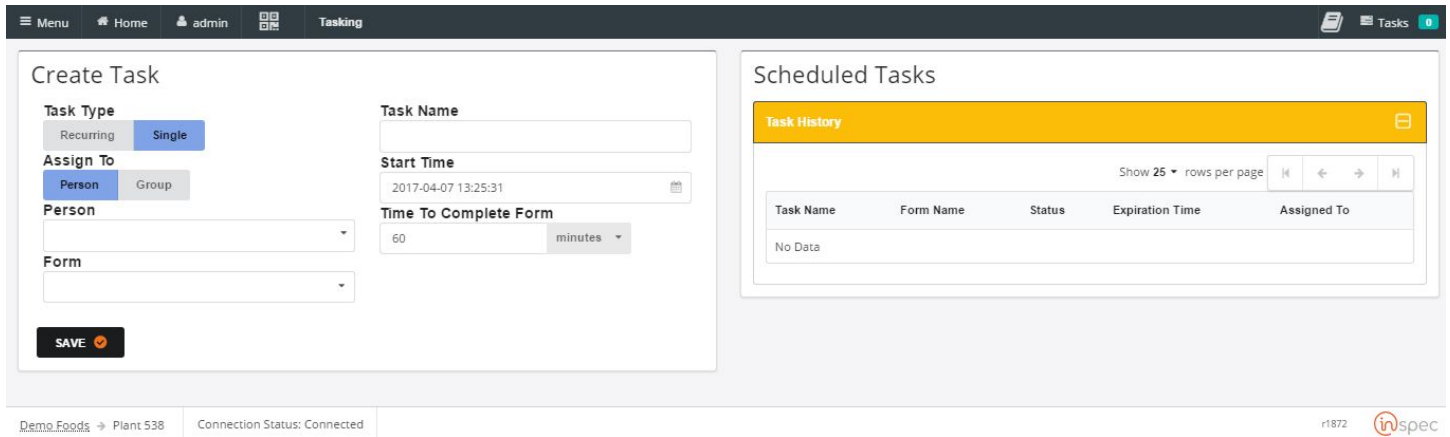




The screenshot shows the inspec dashboard interface. At the top, there is a search bar with the text "Search...". To the right of the search bar are navigation links: "Menu", "Home", "admin", and "Inspec". The main content area is divided into several sections. On the left, a dark sidebar contains a list of menu items: "Administrative", "Cron History", "Diagnostic", "Image Browser", "Security", "Settings", "System Health", "System Setup", "Tasking", "Users", "GMPs", and "Maintenances". The "Administrative" item is highlighted with a red border. The main content area has a "Filter/Search" section with a blue button labeled "Showing Completed". Below this is a green header for "Today's Tasks". At the bottom, there is a table with two columns: "Task Name" and "Form Name". The table currently displays "No Data".



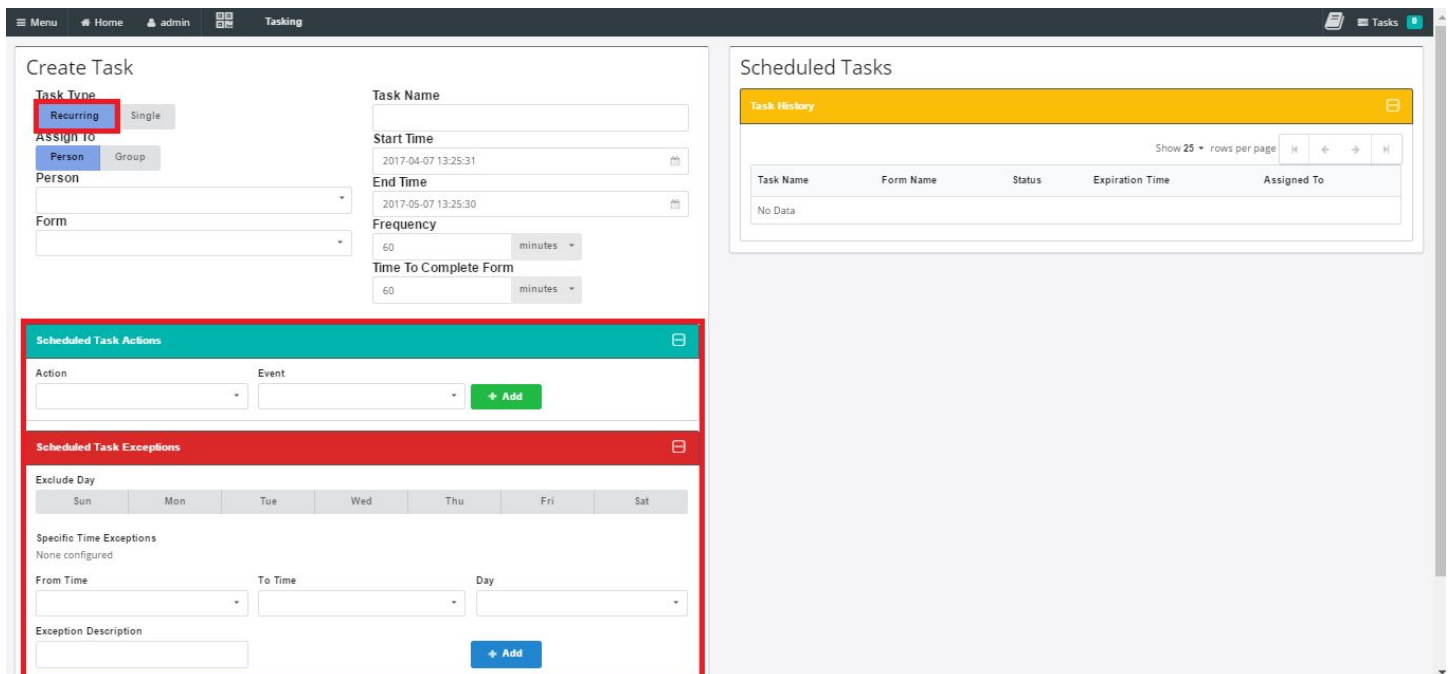
This screenshot is similar to the one above, showing the inspec dashboard. The search bar and navigation links are the same. In the sidebar, the "Tasking" menu item is now highlighted with a red border. The main content area remains the same, with the "Filter/Search" section, "Showing Completed" button, "Today's Tasks" header, and the "Task Name" / "Form Name" table showing "No Data".



To create a task,

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

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



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

The screenshot shows the 'Create Task' form in the 'Tasking' section. The 'Task Type' is set to 'Single' (highlighted with a red box). The 'Assign To' section has 'Person' selected. The 'Task Name' field is empty. The 'Start Time' is 2017-04-07 13:25:31. The 'Time To Complete Form' is 60 minutes. A 'SAVE' button is visible at the bottom left. The 'Scheduled Tasks' panel on the right shows a 'Task History' table with no data.

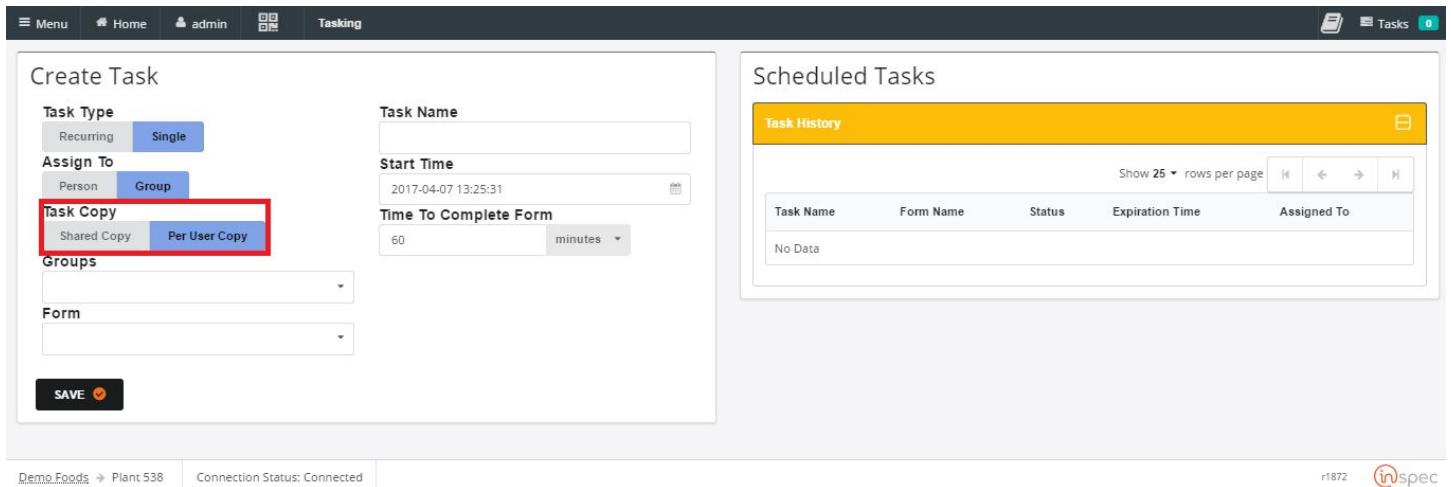
Next, Select who to assign the task to with either the <Person> or <Group> actions.

The screenshot shows the 'Create Task' form. The 'Assign To' section has 'Group' selected (highlighted with a red box). The 'Person' dropdown menu is empty. The 'Task Name' field is empty. The 'Start Time' is 2017-04-07 13:25:31. The 'Time To Complete Form' is 60 minutes. A 'SAVE' button is visible at the bottom left. The 'Scheduled Tasks' panel on the right shows a 'Task History' table with no data.

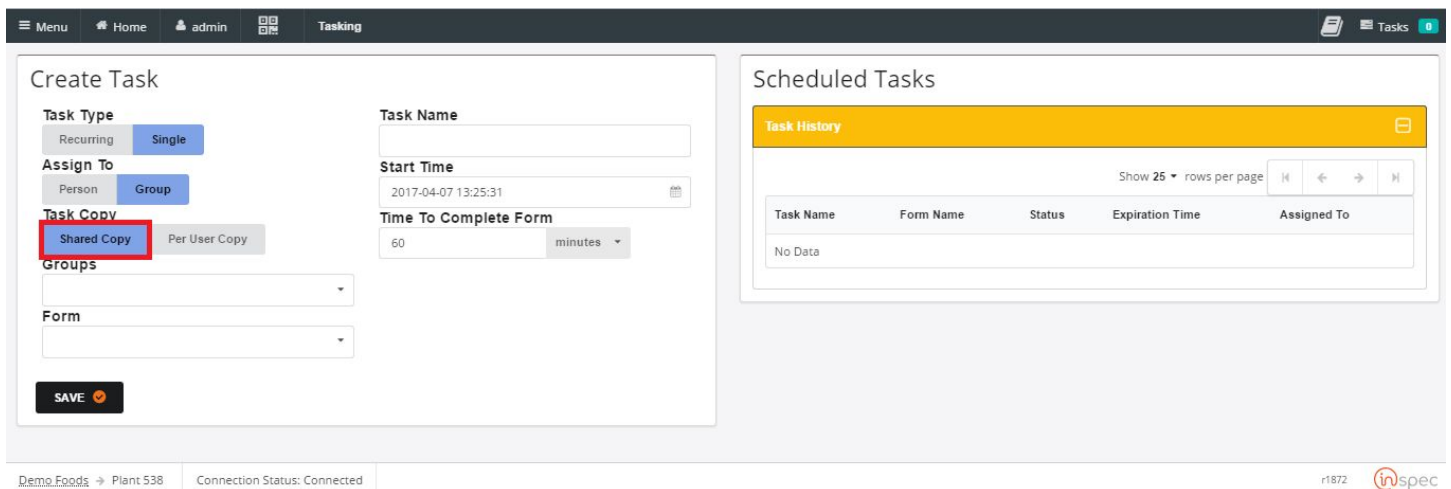
“Person” will present a “Person” drop-down menu that will prompt the user to select the name of a user for the task to be assigned to.

The screenshot shows the 'Create Task' form with the 'Person' dropdown menu open. The dropdown list contains the following names: admin, jsc, rmp, TEST TOM, jsc2, and testenroll. The 'Task Name' field is empty. The 'Start Time' is 2017-04-07 13:25:31. The 'Time To Complete Form' is 60 minutes. A 'SAVE' button is visible at the bottom left. The 'Scheduled Tasks' panel on the right shows a 'Task History' table with no data.

“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>.



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



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

Menu Home admin Tasking Tasks 0

Create Task

Task Type
Recurring Single

Assign To
Person Group

Task Copy
Shared Copy **Per User Copy**

Groups
[Dropdown]

Form
[Dropdown]

SAVE

Task Name
[Text Field]

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

Time To Complete Form
60 minutes

Scheduled Tasks

Task History

Show 25 rows per page

Task Name	Form Name	Status	Expiration Time	Assigned To
No Data				

Demofoods → Plant 538 Connection Status: Connected r1872 inspec

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

Menu Home admin Tasking Tasks 0

Create Task

Task Type
Recurring Single

Assign To
Person Group

Task Copy
Shared Copy Per User Copy

Groups
[Dropdown]

Form
|
485
486
500
522
533
540

Task Name
[Text Field]

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

Time To Complete Form
60 minutes

Scheduled Tasks

Task History

Show 25 rows per page

Task Name	Form Name	Status	Expiration Time	Assigned To
No Data				

Demofoods → Plant 538 Connection Status: Connected r1872 inspec

Name the task in the “task name” field.

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

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

Menu Home admin Tasking Tasks 0

Create Task

Task Type
Recurring Single

Assign To
Person Group

Task Copy
Shared Copy Per User Copy

Groups

Form

SAVE

Scheduled Tasks

Task History

Show 25 rows per page

Task Name	Form Name	Status	Expiration Time	Assigned To
No Data				

Time To Complete Form: 60 minutes

Demo Foods → Plant 538 Connection Status: Connected r1872 inspec

Lastly, save the task to complete tasking.

Menu Home admin Tasking Tasks 0

Create Task

Task Type
Recurring Single

Assign To
Person Group

Task Copy
Shared Copy Per User Copy

Groups

Form

SAVE

Scheduled Tasks

Task History

Show 25 rows per page

Task Name	Form Name	Status	Expiration Time	Assigned To
No Data				

Time To Complete Form: 60 minutes

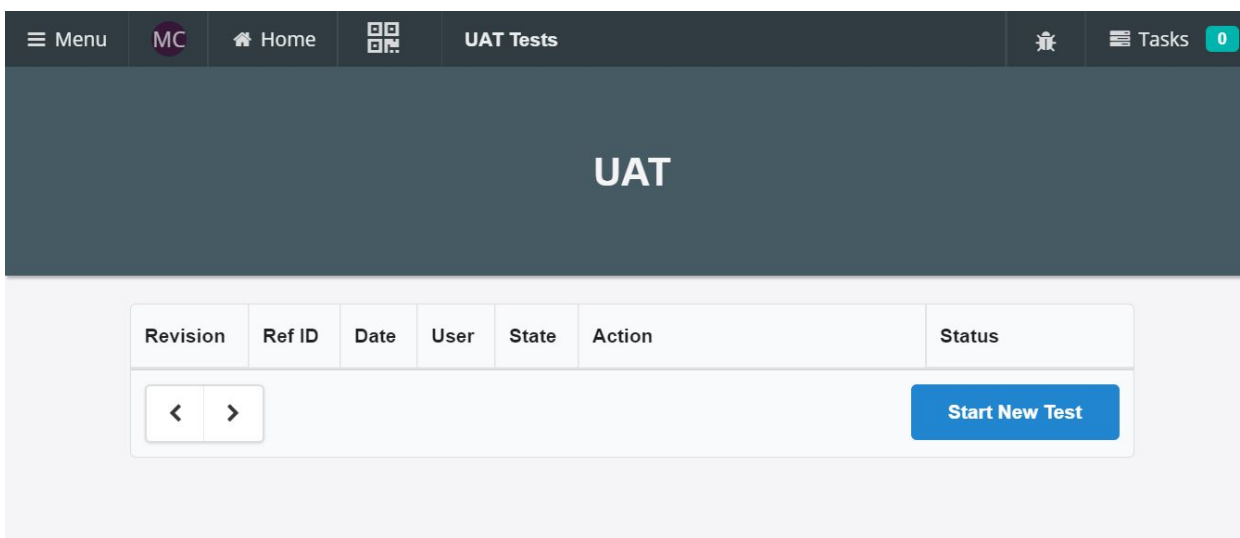
Demo Foods → Plant 538 Connection Status: Connected r1872 inspec

UAT (User Acceptable Testing) Management

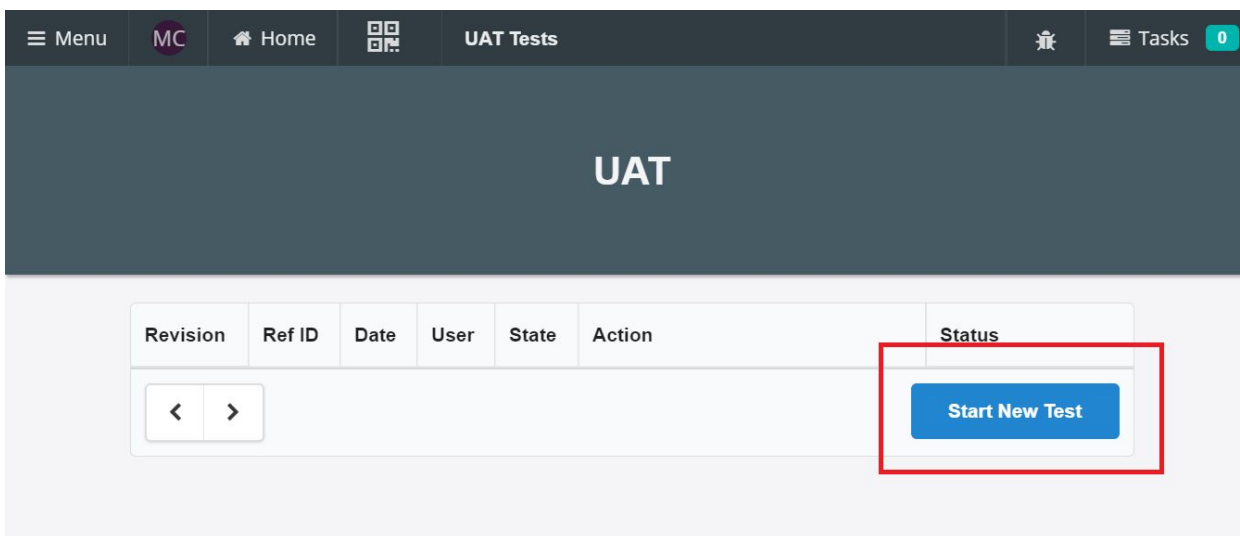
<h3>Role Permissions Needed</h3>	
Role Value	Role Name
uatAdmin	UAT Administrator

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.













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



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
 Test Form (From Grid/Instance) Incomplete	Start Test
 486 Incomplete	Start Test
 Group Form Test Incomplete	Start Test
 12/29/17-00A Incomplete	Start Test
 SSOP Pre-OP Inspection Form, Salame Line Incomplete	Start Test
 Shop Order Line Assign Incomplete	Start Test
 Test Plan Draft 1 Incomplete	Start Test
 Test Plan Draft 2 Incomplete	Start Test

[Go Back](#)[Complete 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>.

The screenshot shows a UAT test form with several sections:

- Cart in working order?** (Yes, No, N/A)
- Cart labeled correctly?** (Yes, No, N/A)
- Cart clean and clear for use?** (Yes, No, N/A)
- Dropdown** (Select Dropdown)
- Numeric** (Numeric, - / +)
- Quantity** (Quantity, - / +, °F)
- Upload Image** (Camera icon)
- Segment** (Buttons 1-4, Long rambling text, Some hint)
- Pass/Fail** (Pass, Fail)
- Footer** (Previous, Originating Form, FINISH REPORT, Go Back (UAT), Pass, Fail)

The **Pass** and **Fail** buttons in the footer are highlighted with a red box.

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

The screenshot shows a UAT test list with the following items:

- Demo Form** (Incomplete) - **Report Bugs** (highlighted in red), **Failed**, **View Form**
- Time Sheet** (Filled out: 14%) (Completed) - **Passed**, **View Form**
- Test Form (From Grid/Instance)** (Incomplete) - **Start Test**

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



Inspec User Guide	1
User Administration	2
Role Management	2
Admin Roles	2
Other Roles	3
Windows Active Directory (A/D) User Authentication	4
How to Add, Setup and Configure Users	4
Role Permissions Needed	4
Add a User from the User Maintenance	5
Add a list of Users via the Import process	8
How to Configure a User	9
User Context Administration	9
Password Resetting	10
User Context Maintenance	13
Role Permissions Needed	13
User Enrollment Maintenance	20
Role Permissions Needed	21
Group Management	21
Role Permissions Needed	21
Group Administration	25
How to Add a new Group and assign Roles and Users to a Group	25
How to Edit a Group	27
How to Delete a Group	28
Tasking Management	29
Role Permissions Needed	29
UAT (User Acceptable Testing) Management	36
Role Permissions Needed	36