Inspec User Guide

ver.2020-MAR

User Administration

Role Management

Admin Roles

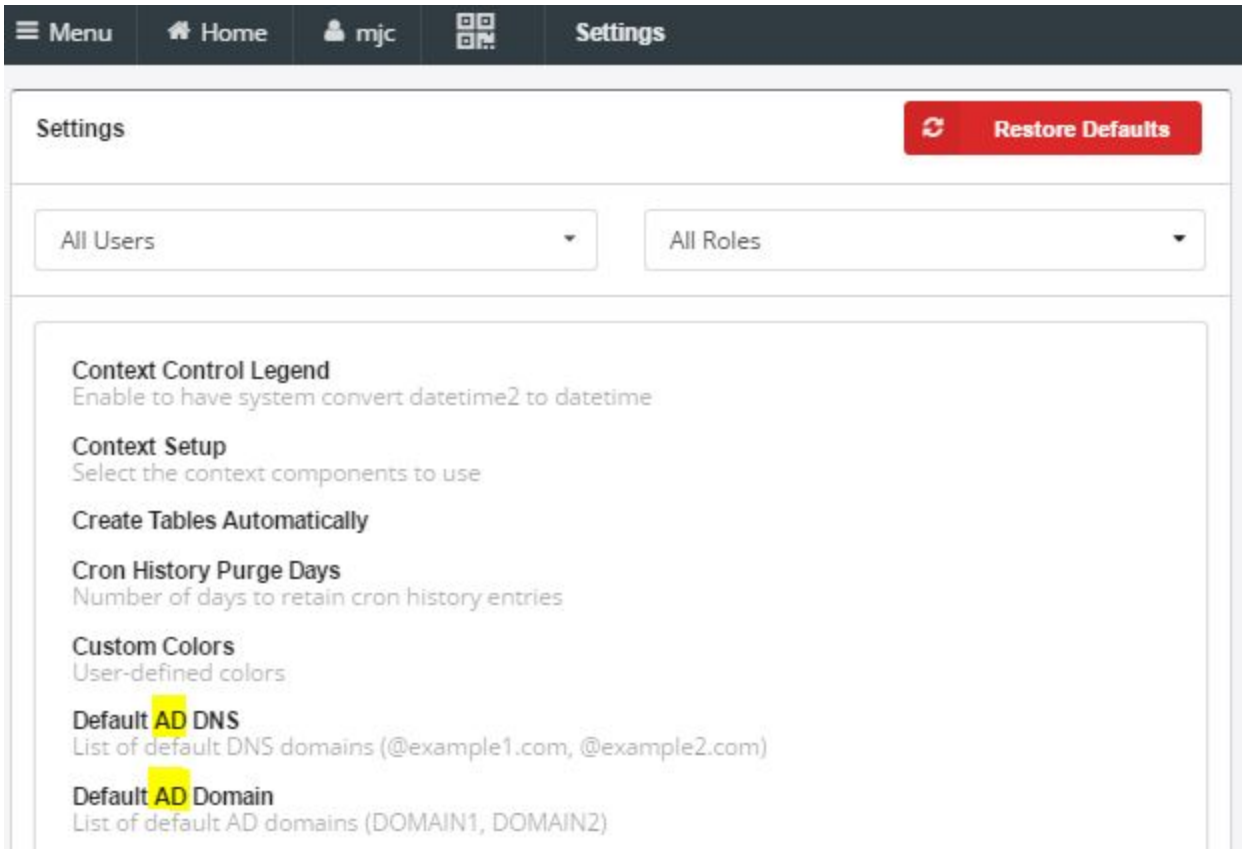
Role Value	Role Name	Role Functions
approvalAdmin	Approval Administrator	**Access to**: Admin Form Review page **Functions**: Allows user to approve forms
cardAdmin	Card Administrator	**Access to**: Card Setup page under Maintenance **Functions**: Allows user to edit and create card layouts
userAdmin	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

Other Roles

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



Environment Settings:

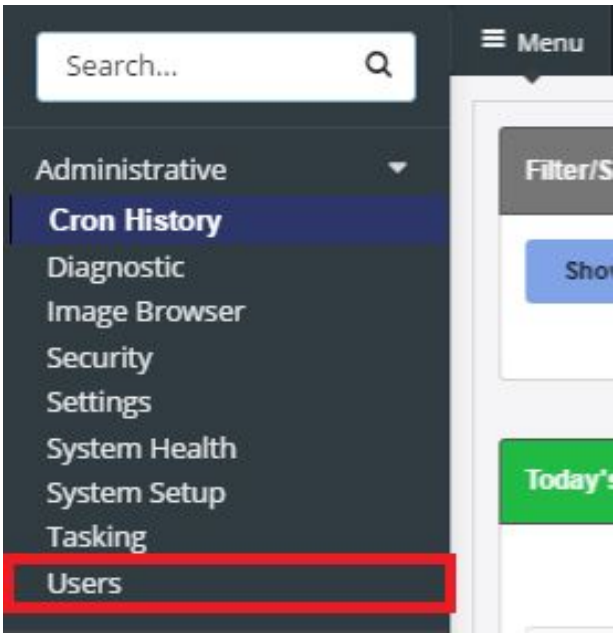
- ldap_servername
- ldap_extended

How to Add, Setup and Configure Users

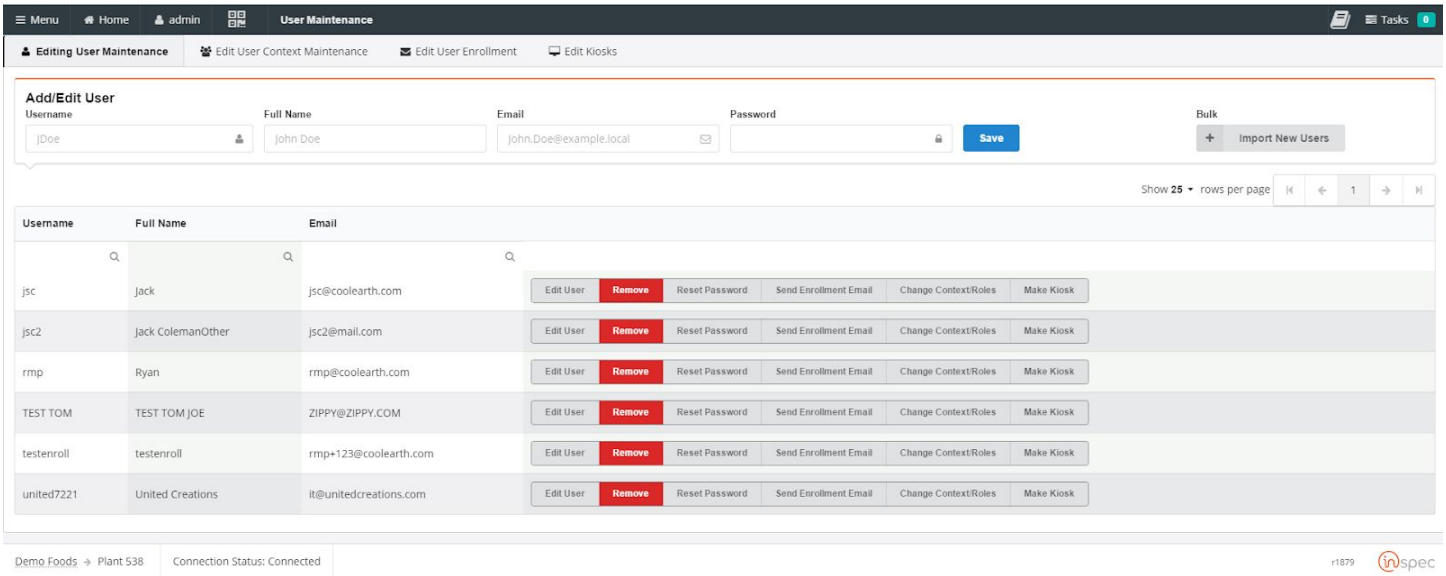
Role Permissions Needed

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.

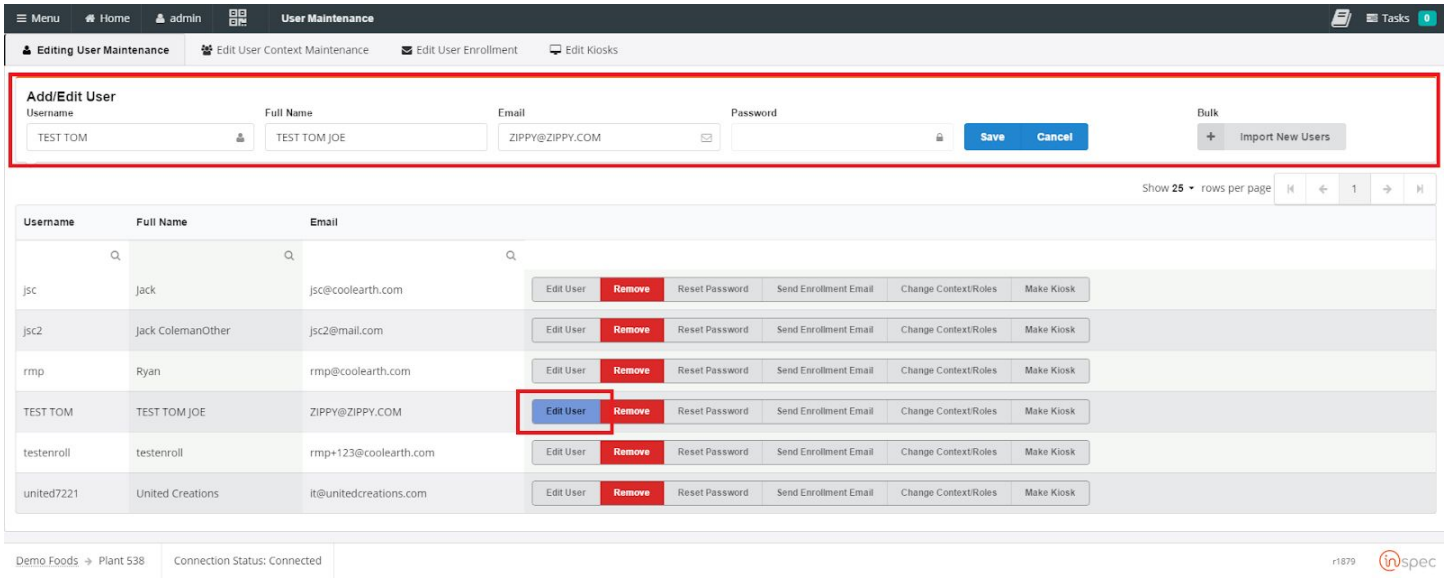


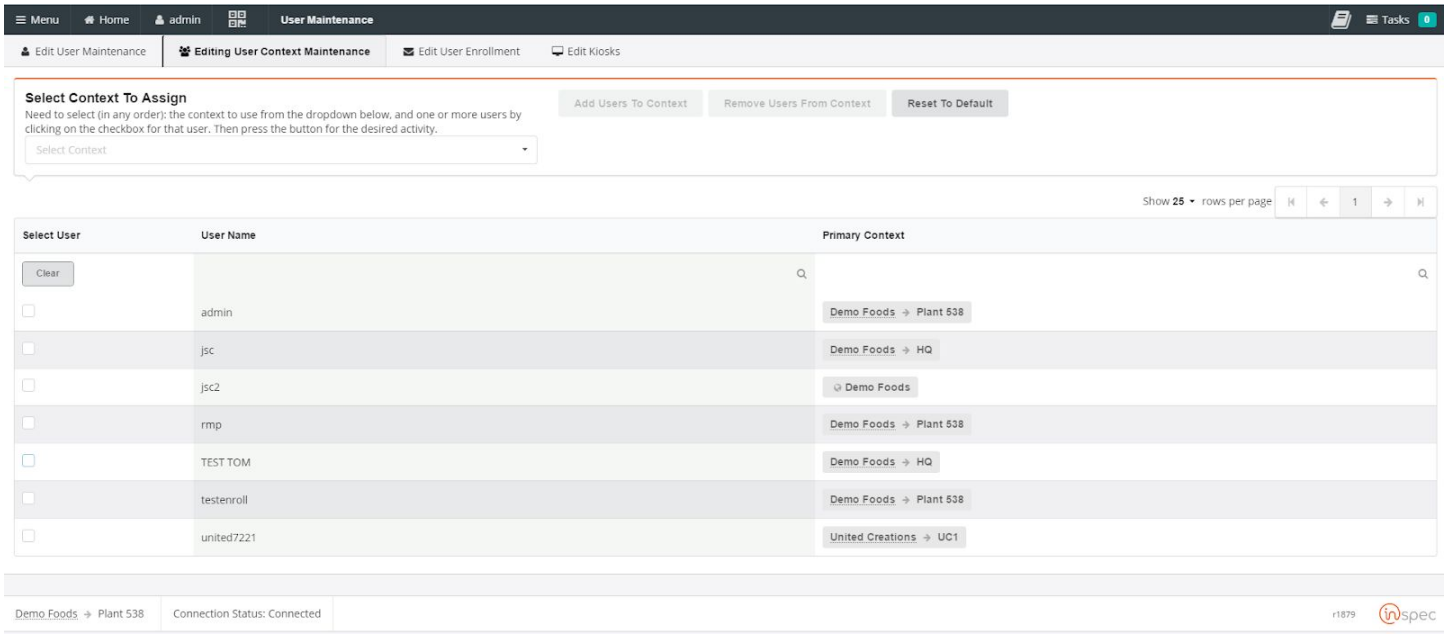
To add a User:

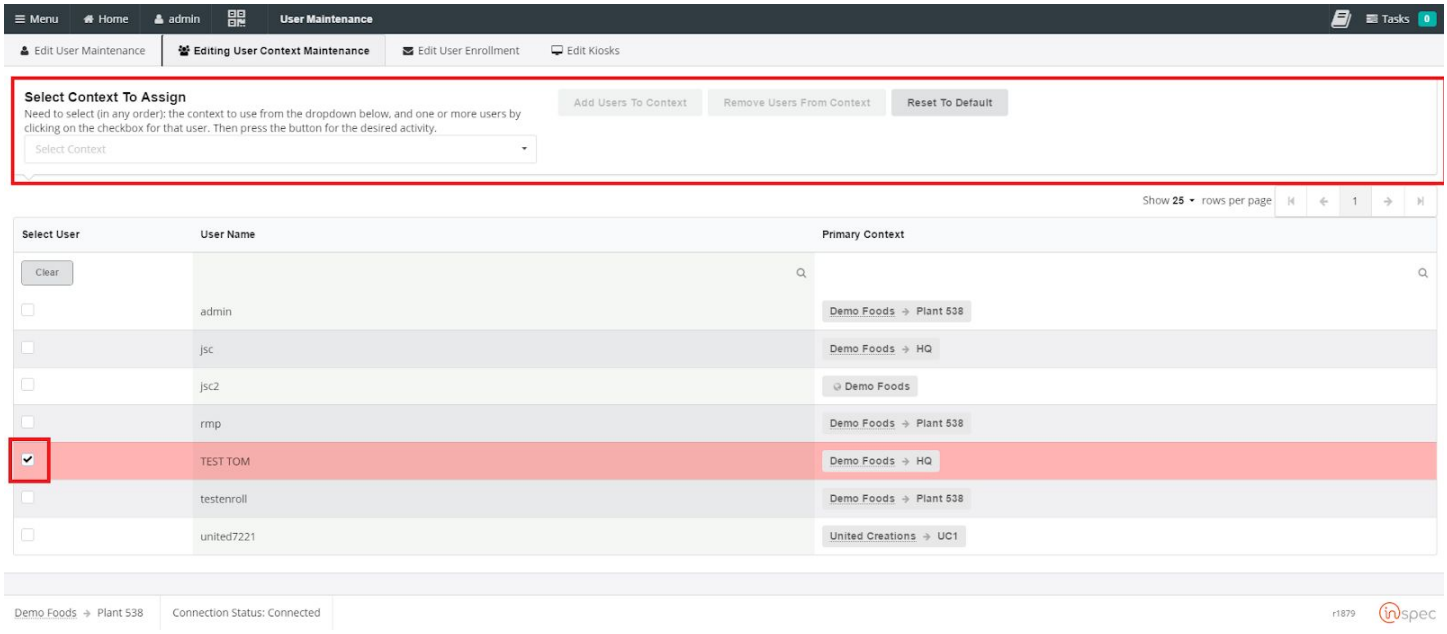
Enter the information about the user at the top of the screen. Fill out the username, the user's full name, email,

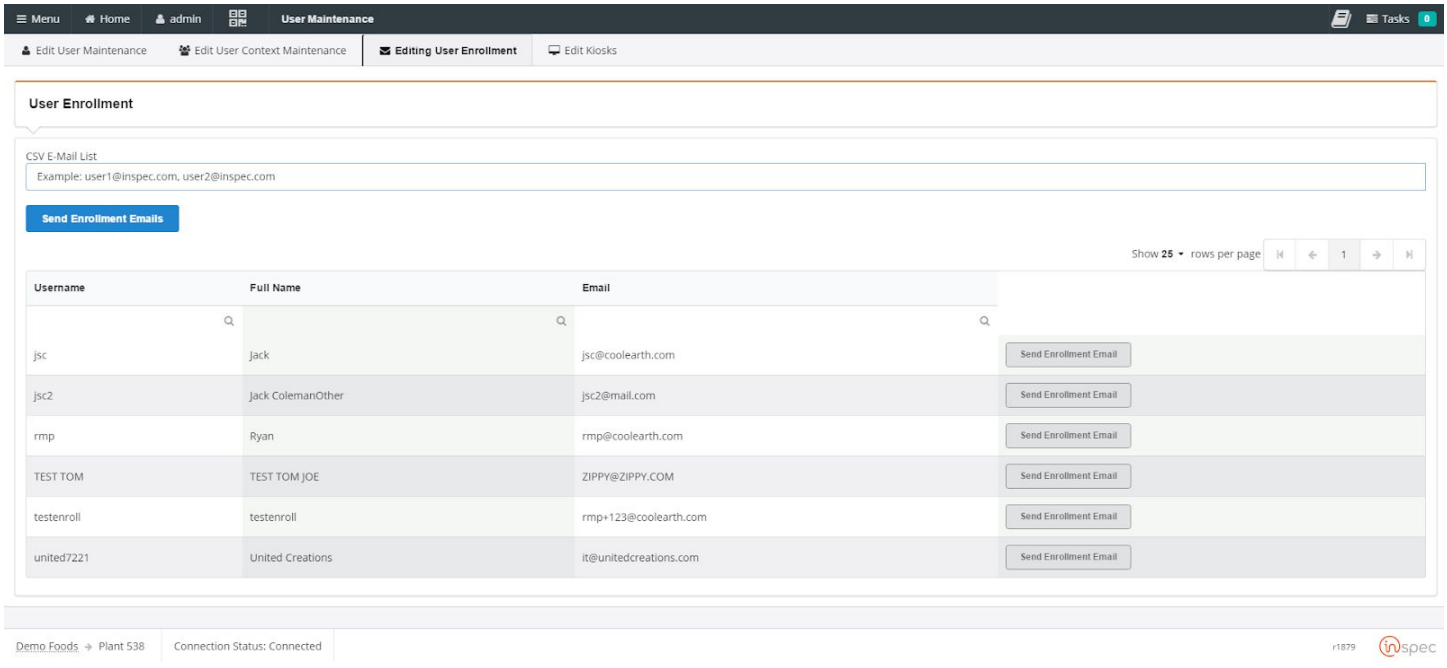
and password, then press the Add/Edit User button.

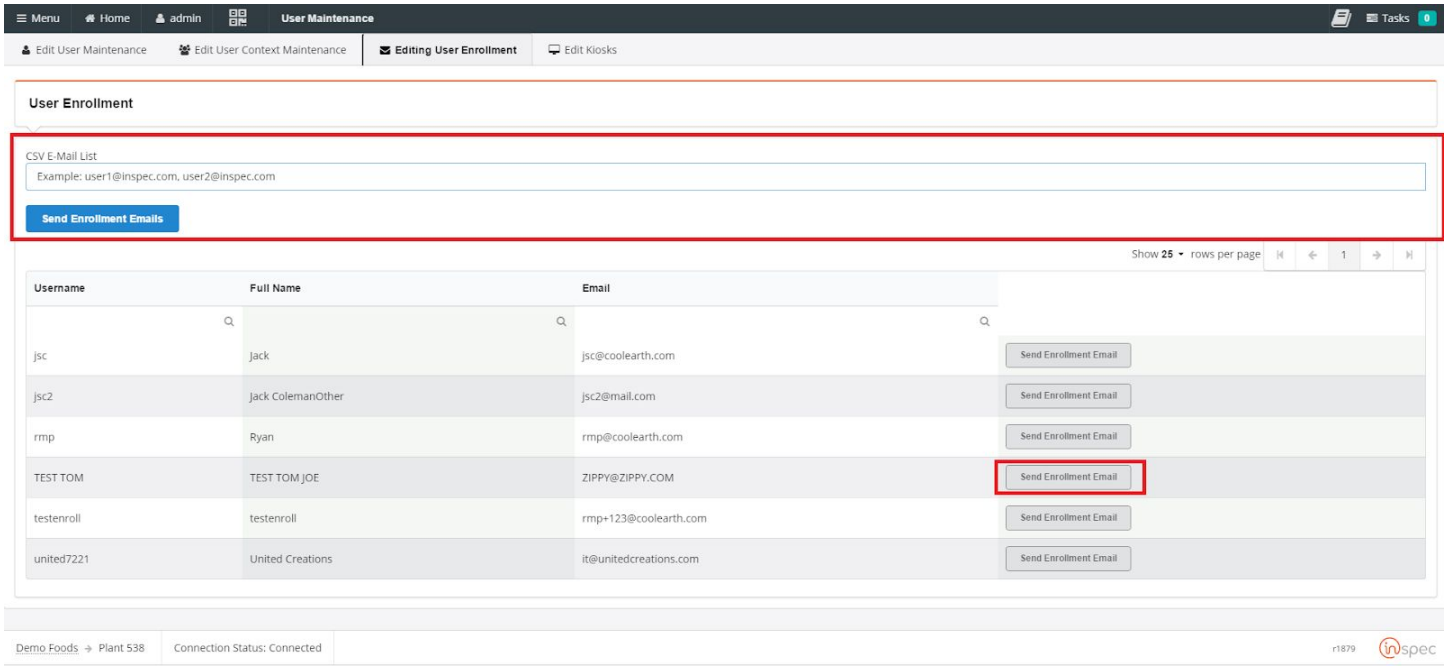
After the user has been added, select the user in the list, and press the Modify User button. This will take you to that user's information page.

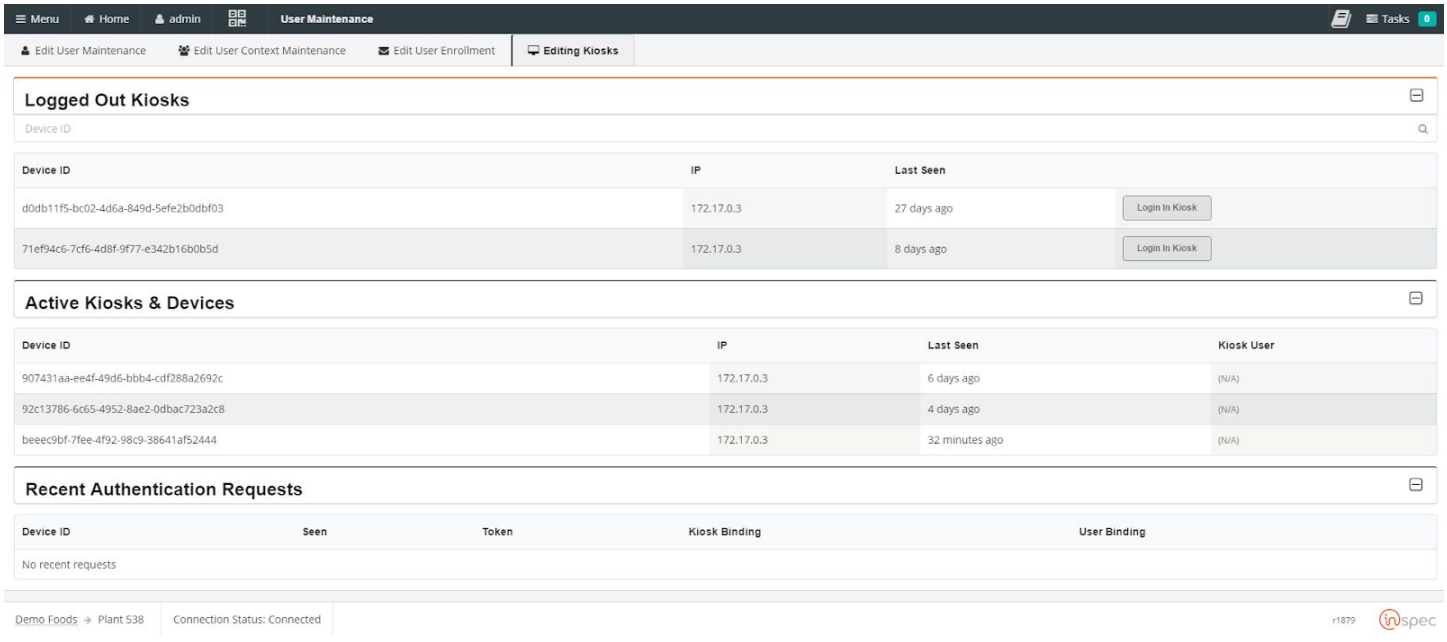




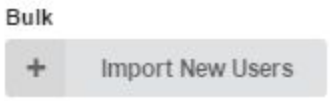

Menu
Home
admin
User Maintenance
Tasks
Edit User Maintenance
Editing User Context Maintenance
Edit User Enrollment
Edit Kiosks
Select Context To Assign
Need to select (in any order): the context to use from the dropdown below, and one or more users by clicking on the checkbox for that user. Then press the button for the desired activity.
Select Context
Add Users To Context
Remove Users From Context
Reset To Default
Show 25 rows per page
Select User
User Name
Primary Context
Clear
admin
Demo Foods → Plant 538
jsc
Demo Foods → HQ
jsc2
Demo Foods
rmp
Demo Foods → Plant 538
TEST TOM
Demo Foods → HQ
testenroll
Demo Foods → Plant 538
united7221
United Creations → UC1
Demo Foods → Plant 538
Connection Status: Connected
r1879


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





Add a list of Users via the Import process

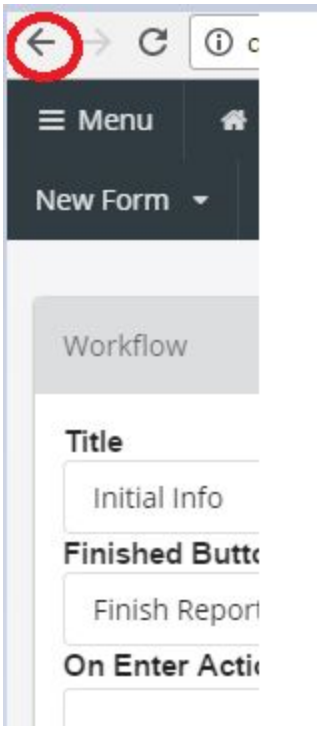


How to Configure a User

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

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

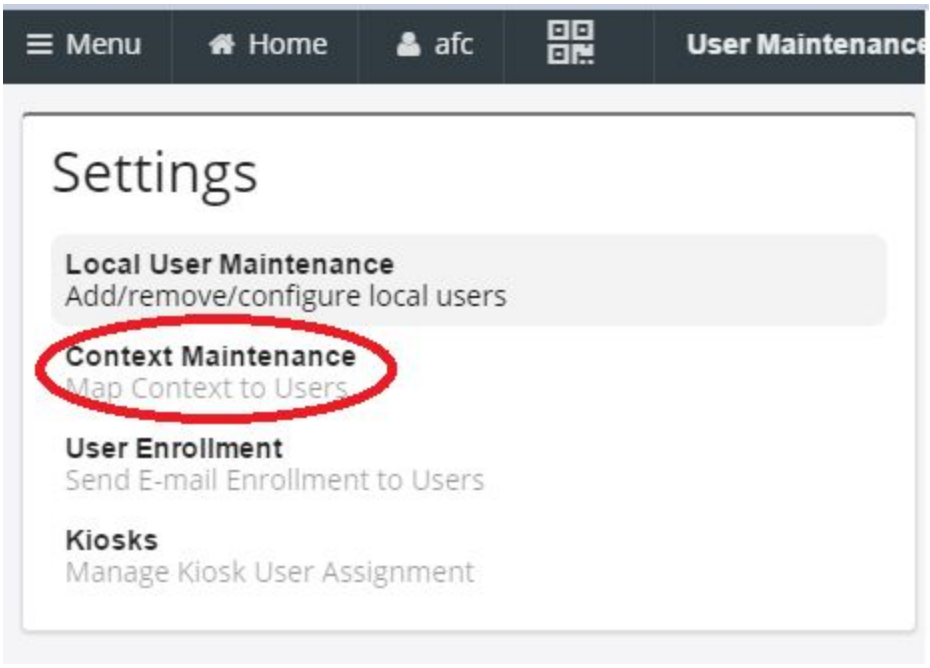
When you are finished, return to the User Maintenance screen by pressing the back arrow (←) in the upper left hand corner of the browser window.



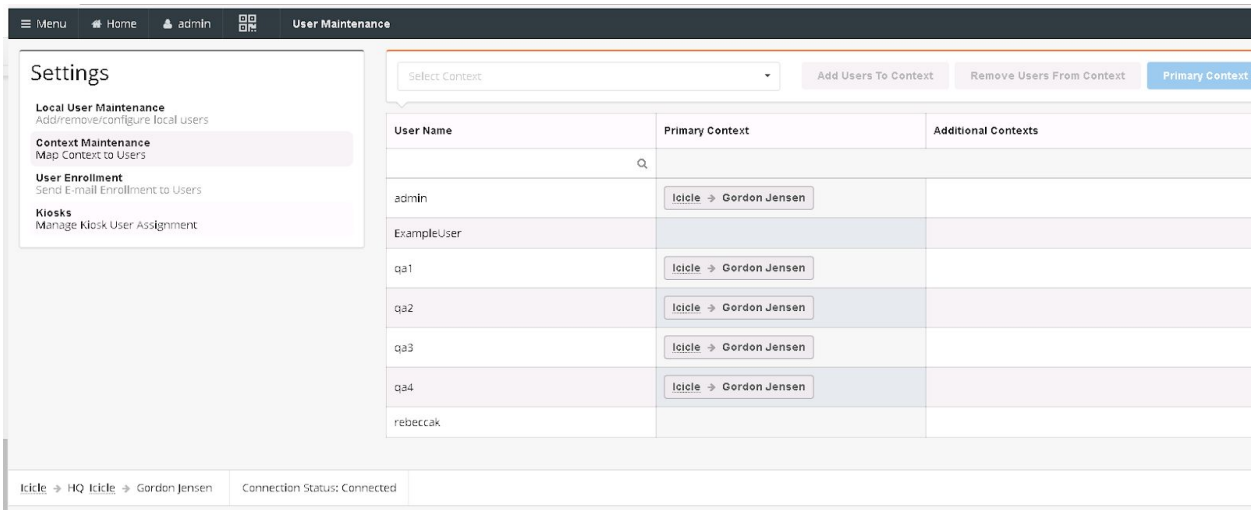
User Context Administration

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

Context Maintenance screen.



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

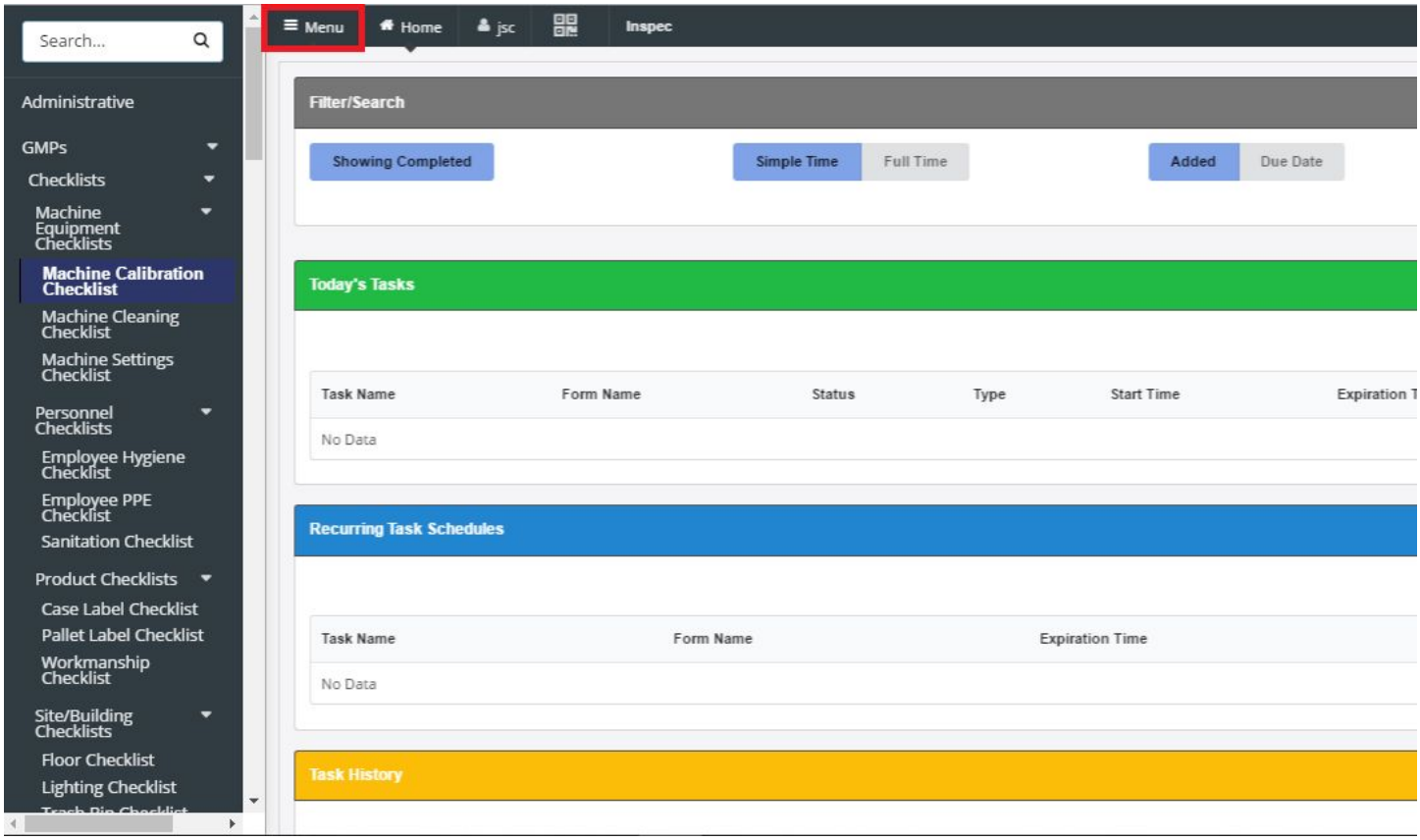


Password Resetting

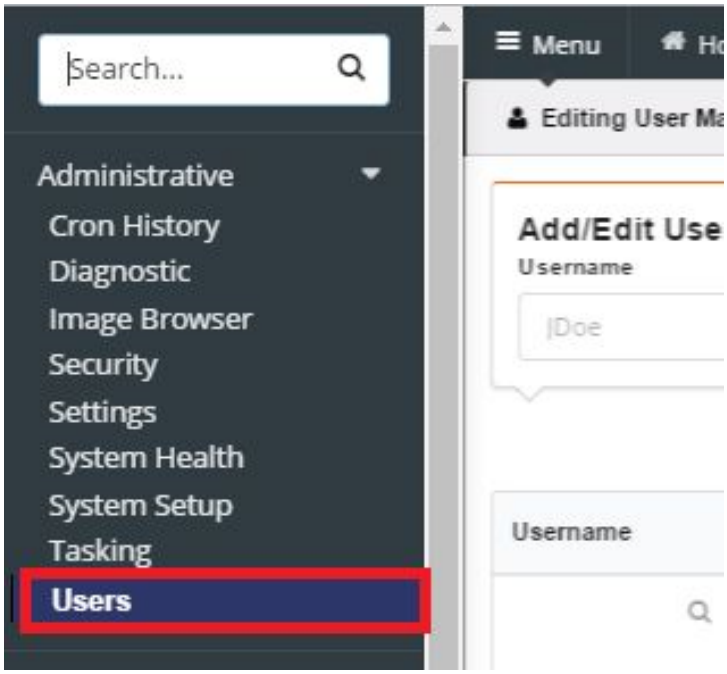
When the user wishes to reset their password they can do so as an administrator. A user can not reset a password if they do not have administrator privileges.

To reset a user's password,

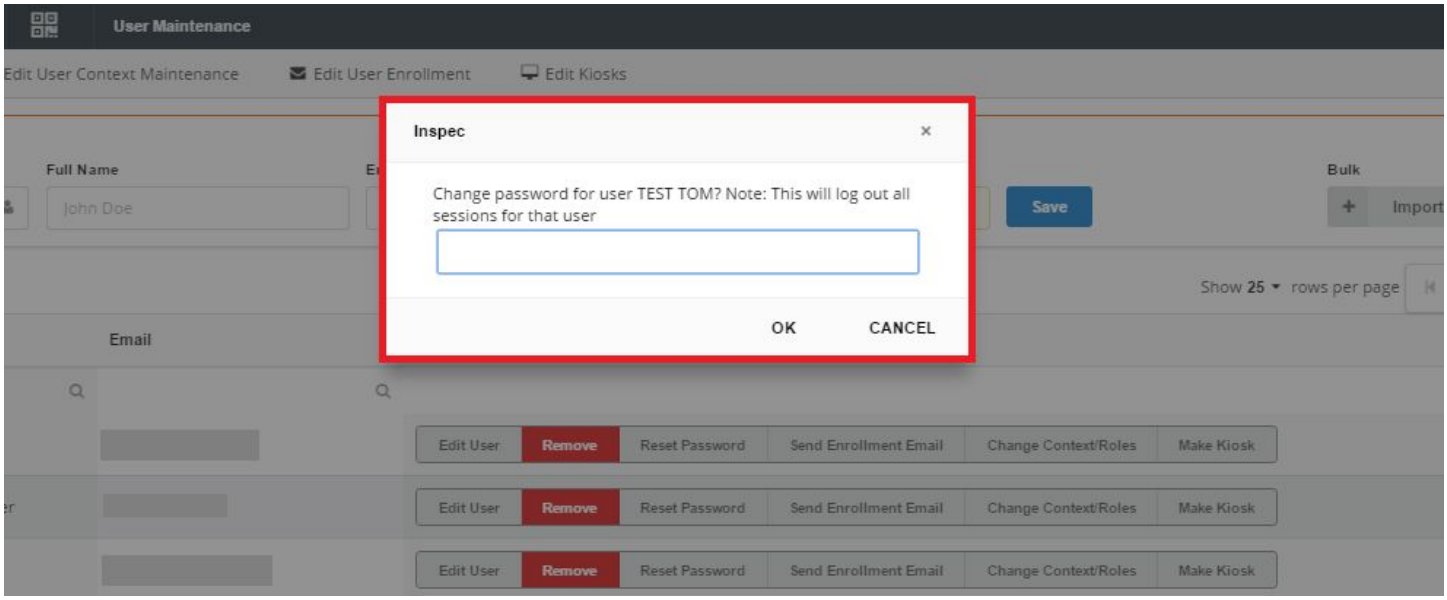
Select the <Menu> slide-out from the top menu bar.

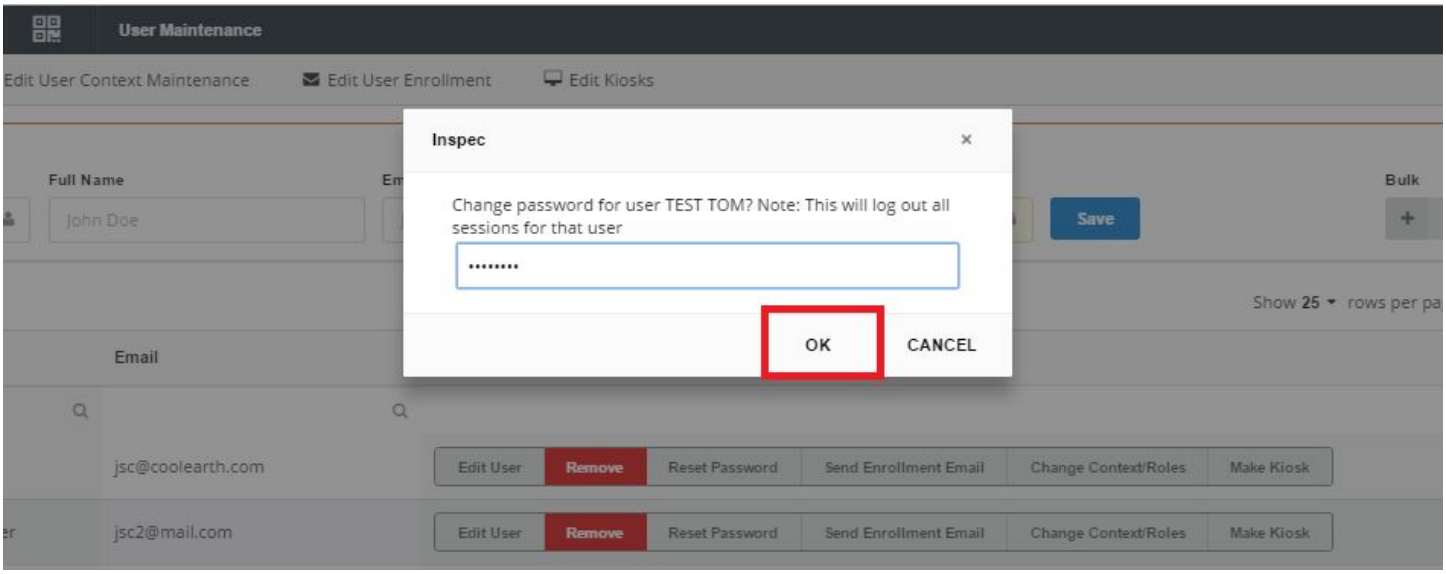


Select the <Users> option from the administrative drop-down.



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

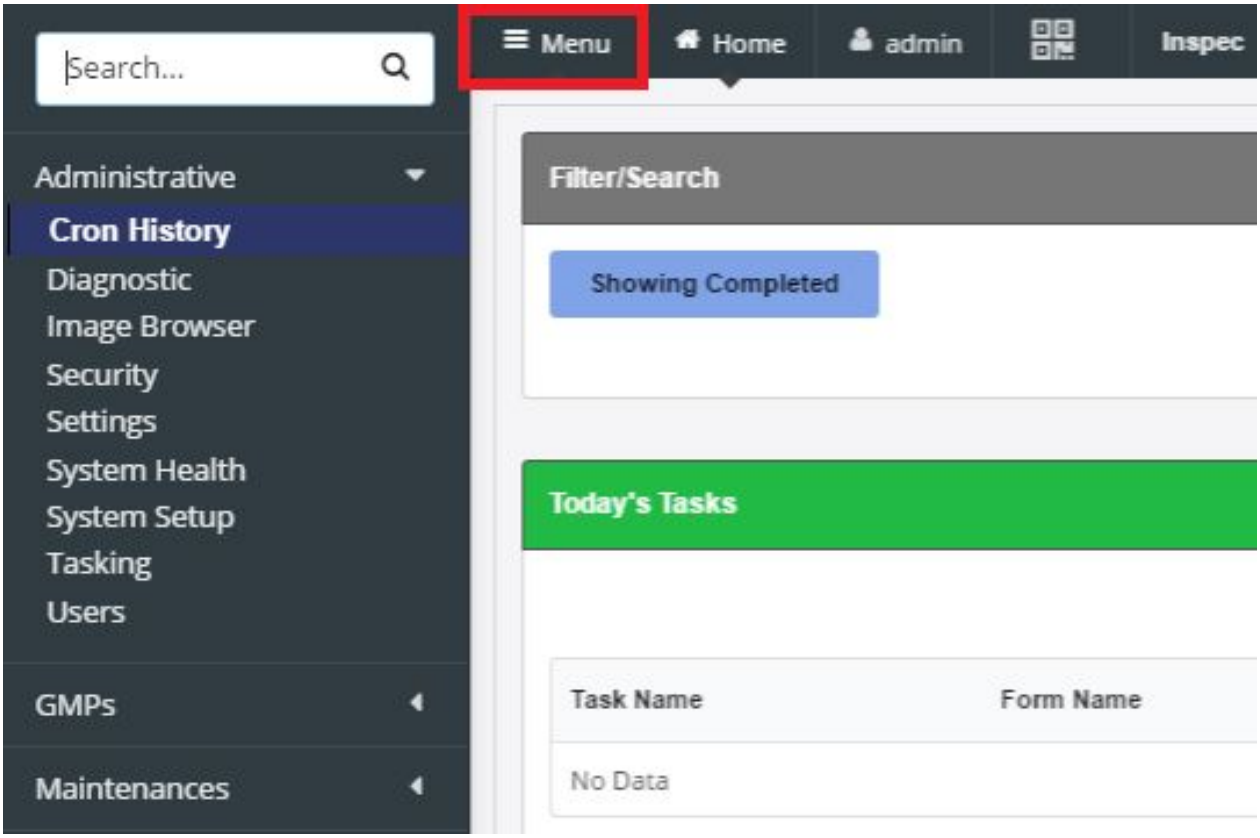
Roles

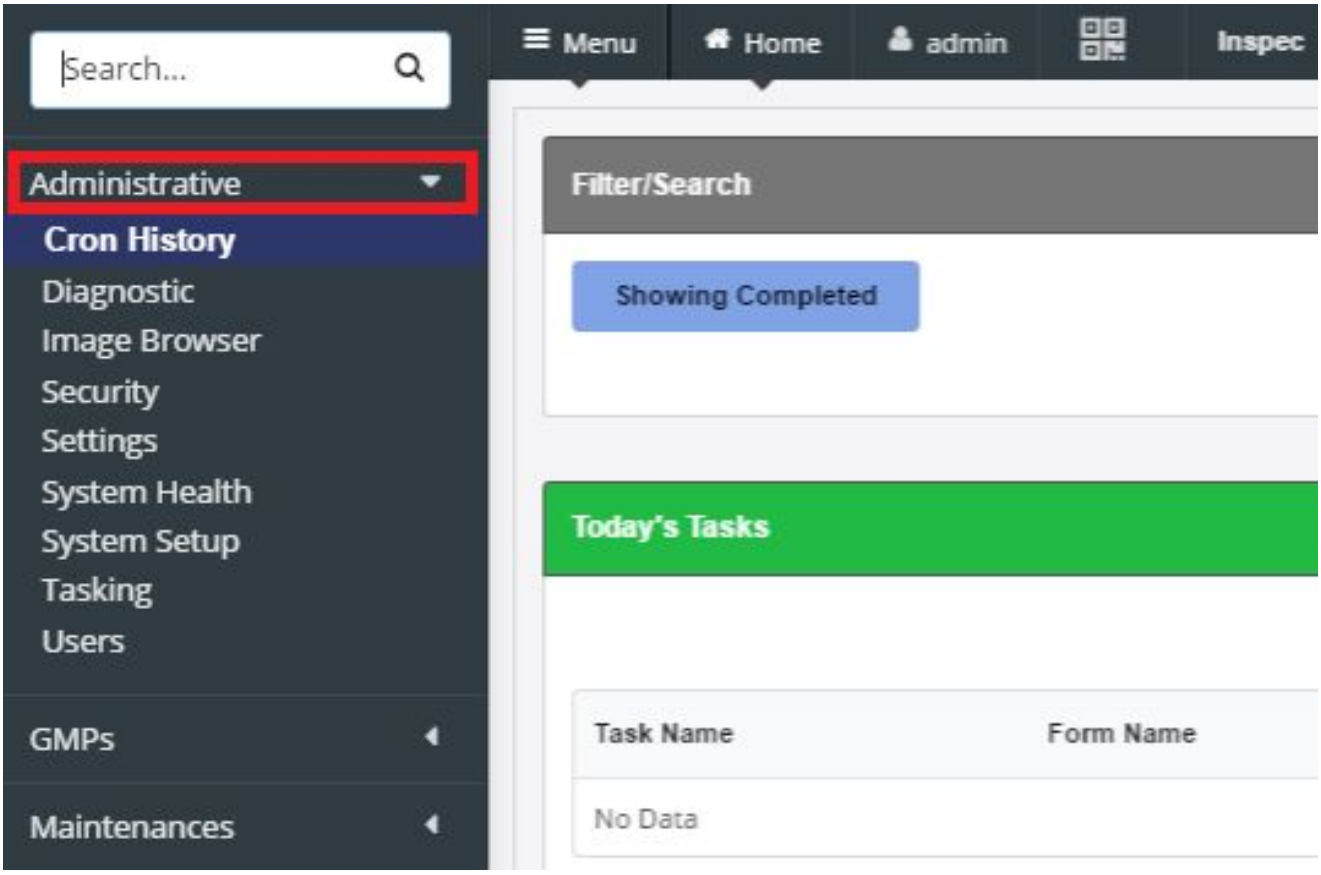
Role Permissions Needed

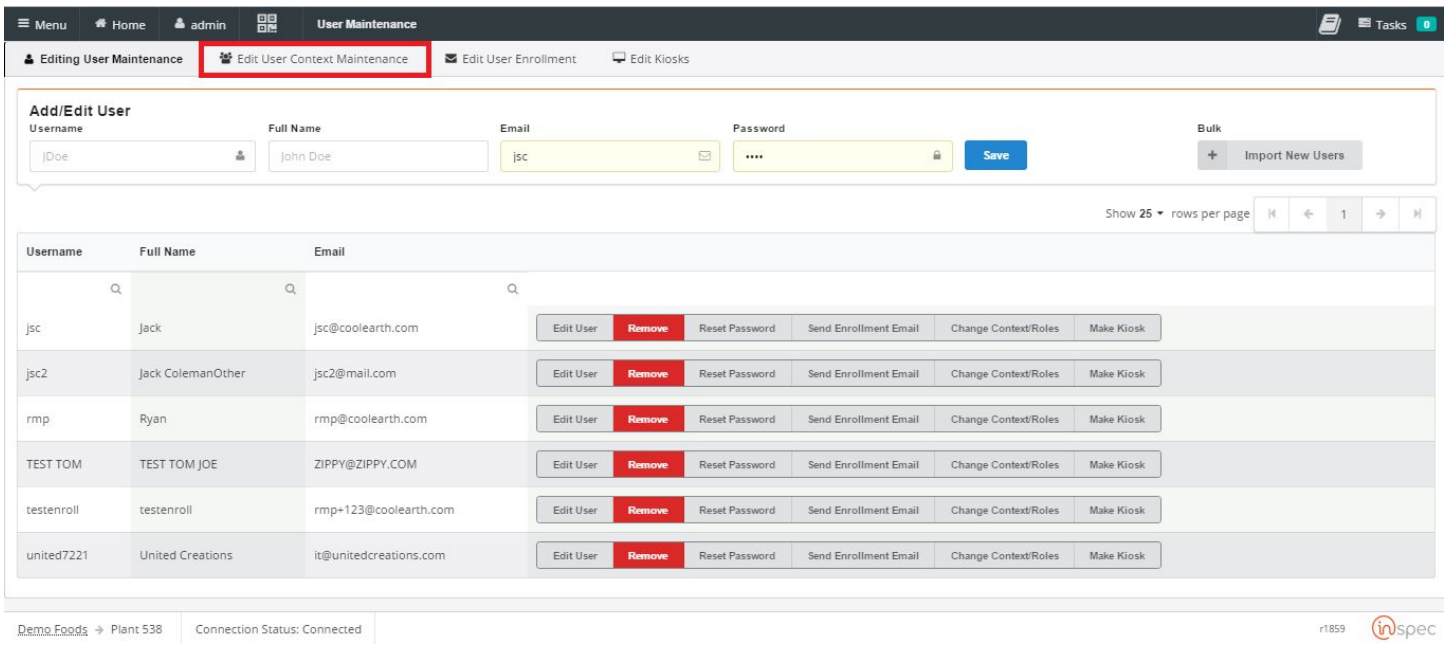
Role Value	Role Name
userAdmin	User Administrator

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

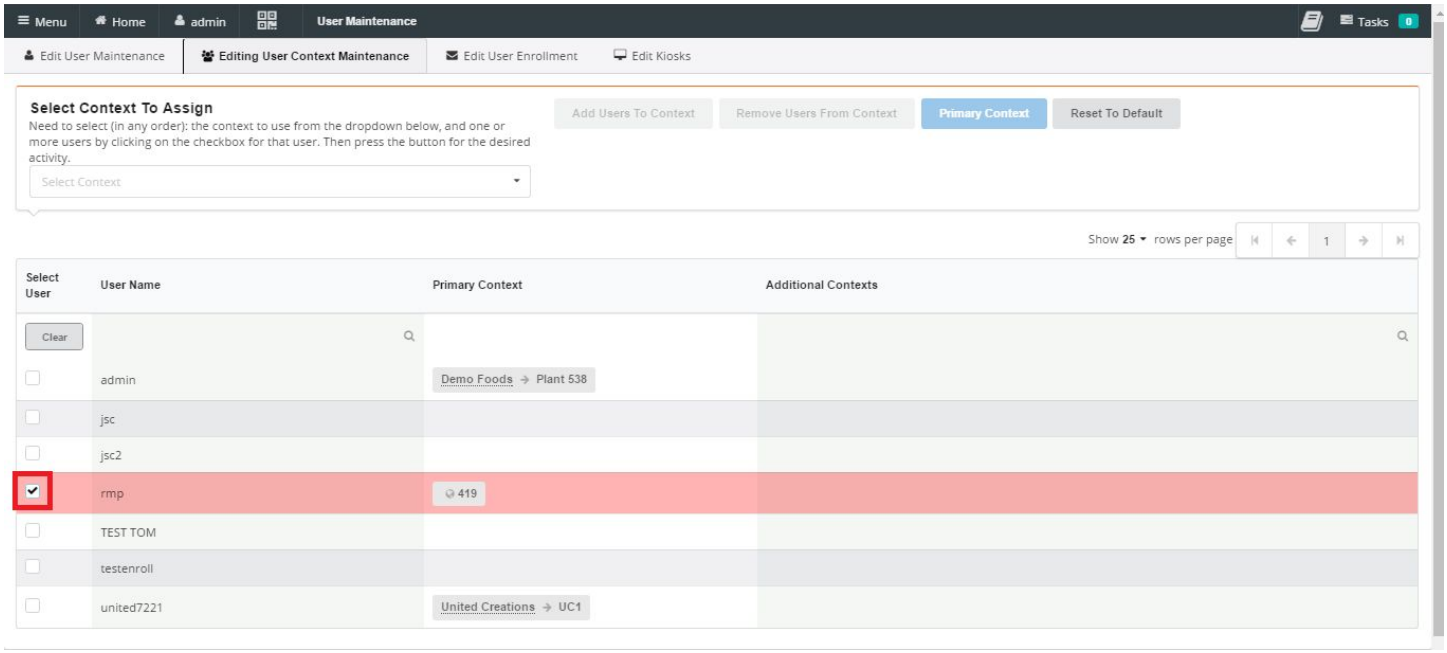
To get to the user context maintenance select the <Menu> slide-out. Select the <Administrative> drop-down and <Users>. Next, select the <Editing User Context Maintenance> tab, from the top submenu.


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

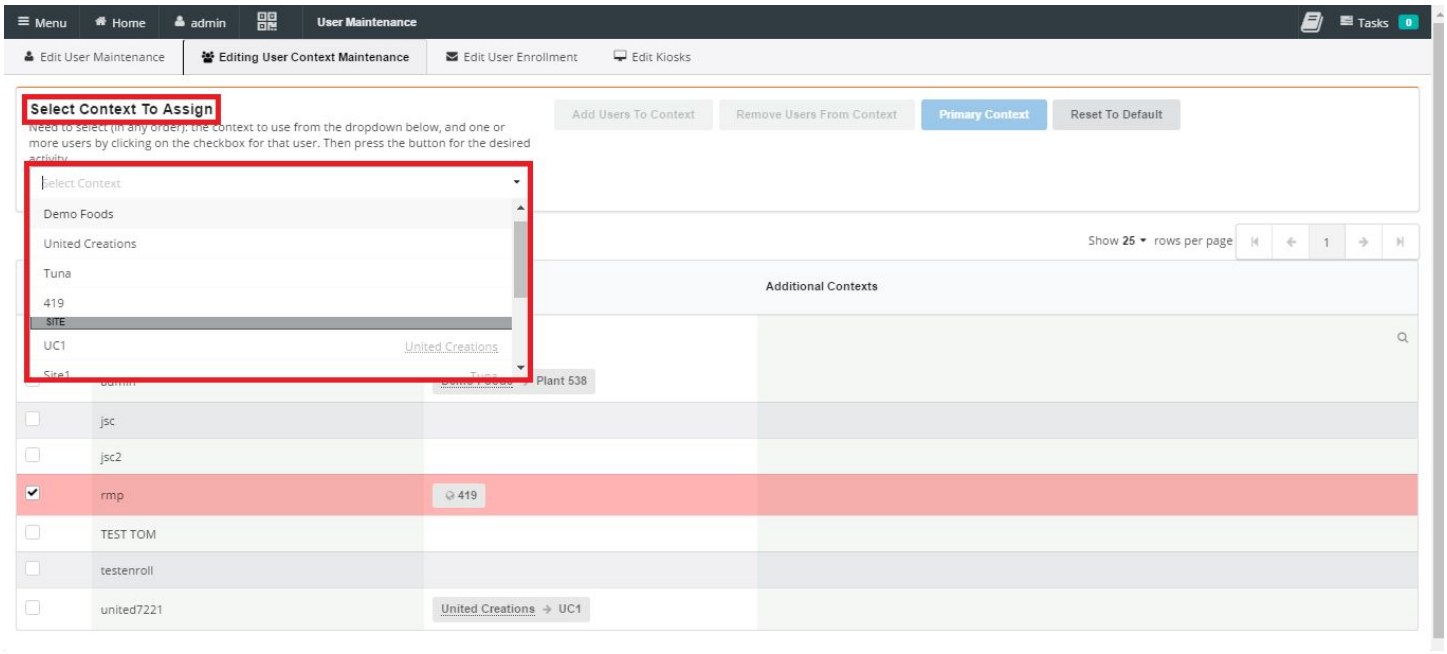

Search...
Menu
Home
admin
Inspec
Administrative
Cron History
Diagnostic
Image Browser
Security
Settings
System Health
System Setup
Tasking
Users
GMPs
Maintenances
Filter/Search
Showing Completed
Today's Tasks
Task Name
Form Name
No Data


Menu
Home
admin
User Maintenance
Tasks
Editing User Maintenance
Edit User Context Maintenance
Edit User Enrollment
Edit Kiosks
Add/Edit User
Username
Full Name
Email
Password
Save
Bulk
Import New Users
Show 25 rows per page
Username
Full Name
Email
jsc
Jack
jsc@coolearth.com
jsc2
Jack ColemanOther
jsc2@mail.com
rmp
Ryan
rmp@coolearth.com
TEST TOM
TEST TOM JOE
ZIPPY@ZIPPY.COM
testenroll
testenroll
rmp+123@coolearth.com
united7221
United Creations
it@unitedcreations.com
Edit User
Remove
Reset Password
Send Enrollment Email
Change Context/Roles
Make Kiosk
Demo Foods → Plant 538
Connection Status: Connected
r1859

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



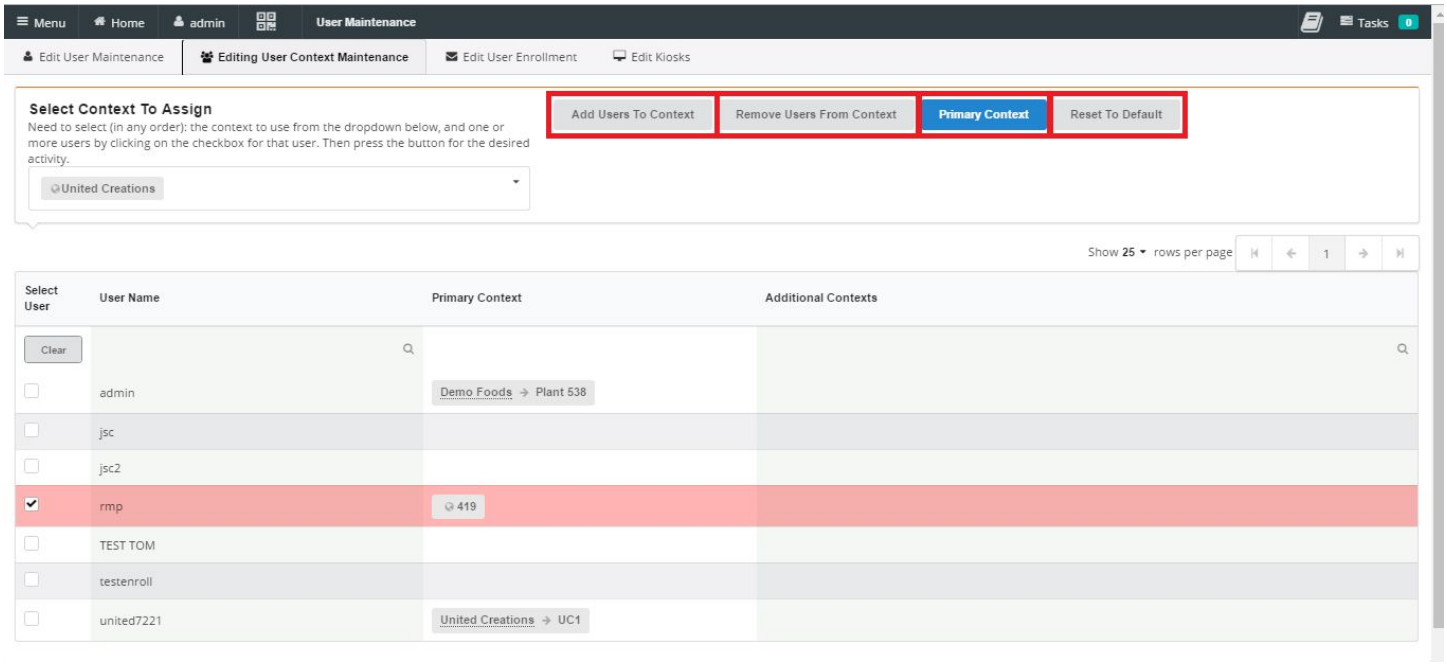
Select context to assign in the drop-down submenu.



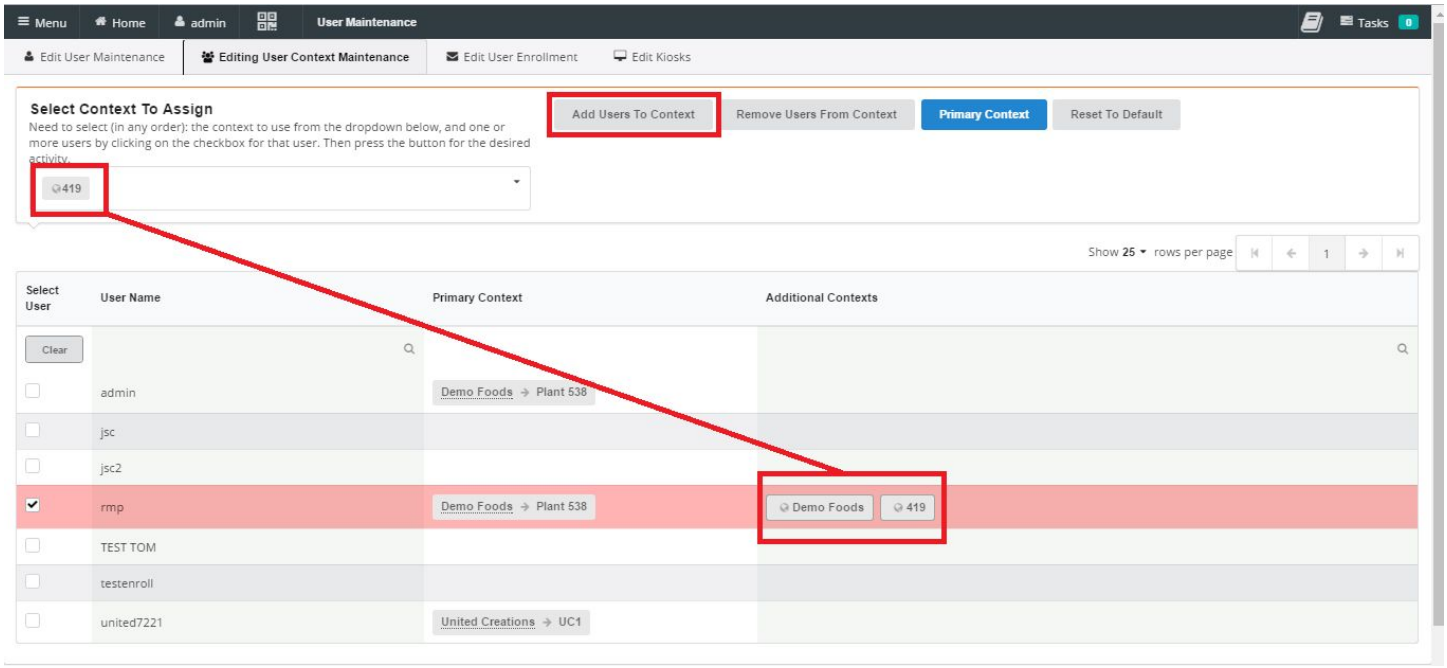
next, select the function the user wishes to perform with the context. <Add Users to Context>, <Remove Users from Context>, <Primary Context>, <Reset to Default>.

<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.

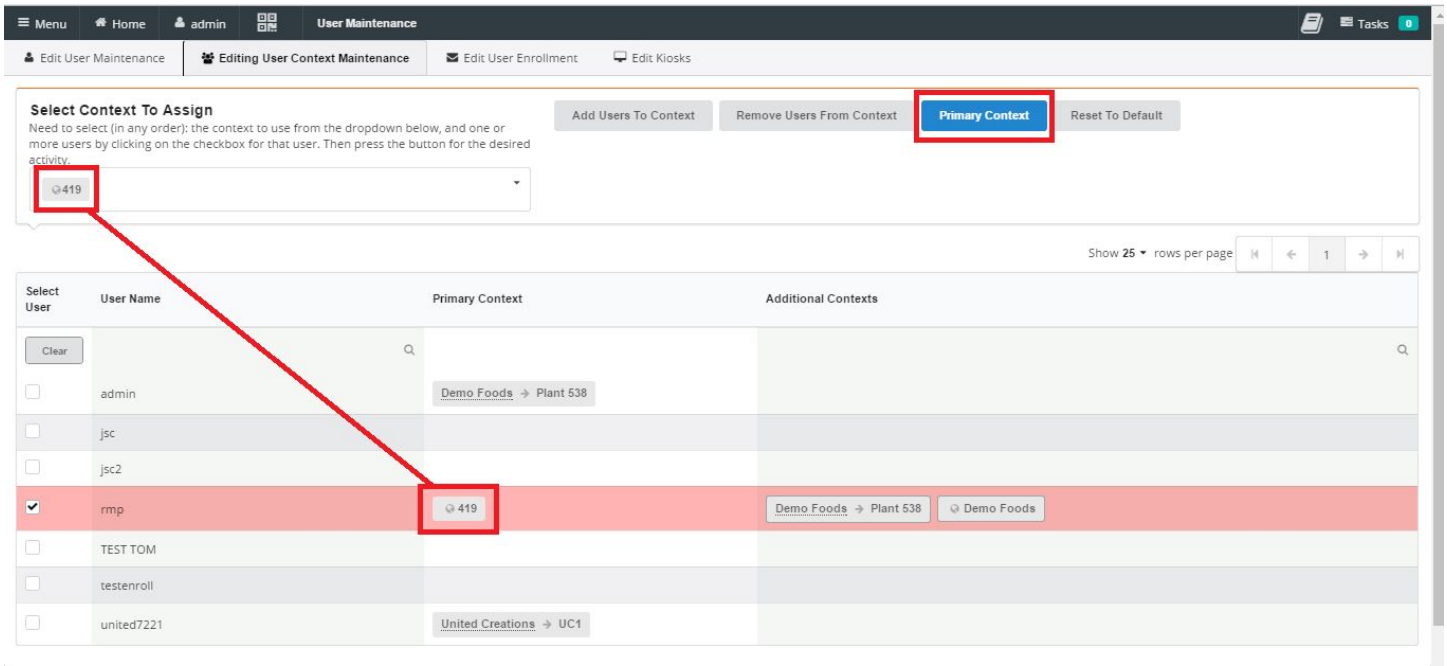
Context actions.



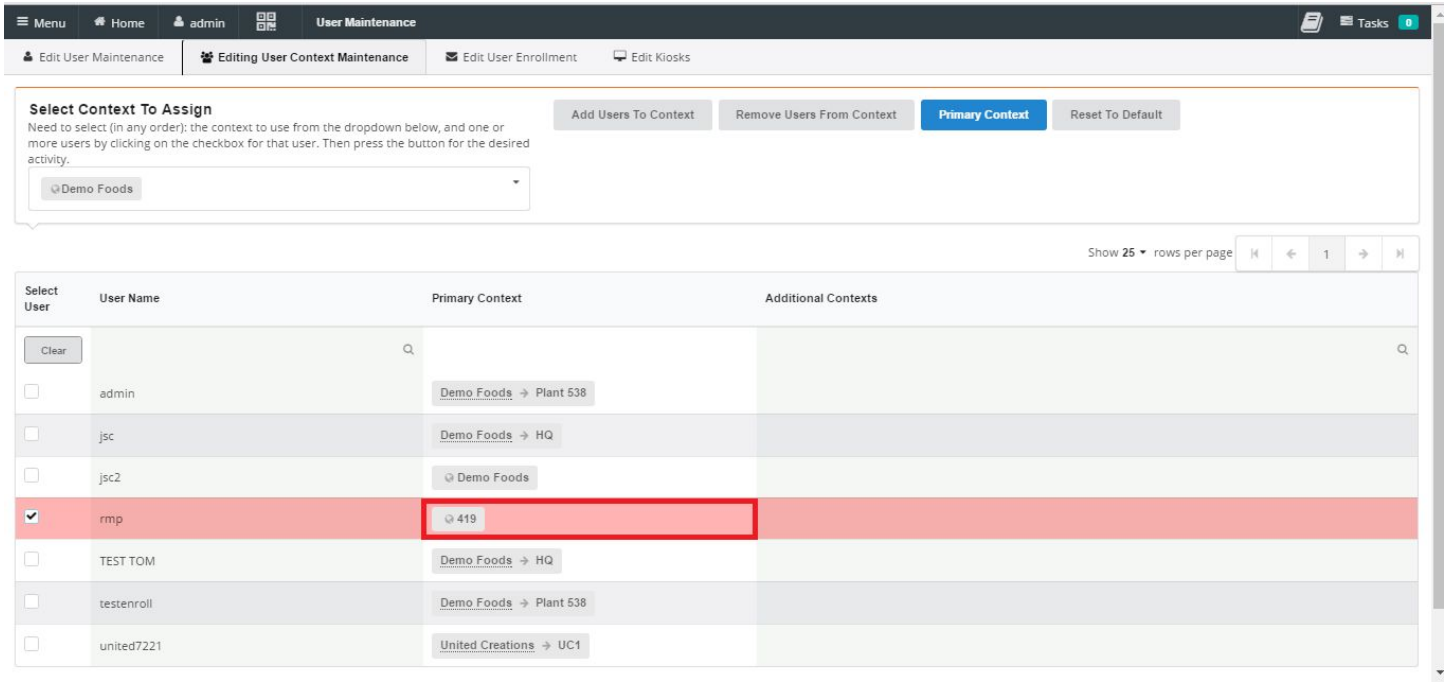
Adding user(s) to a context.

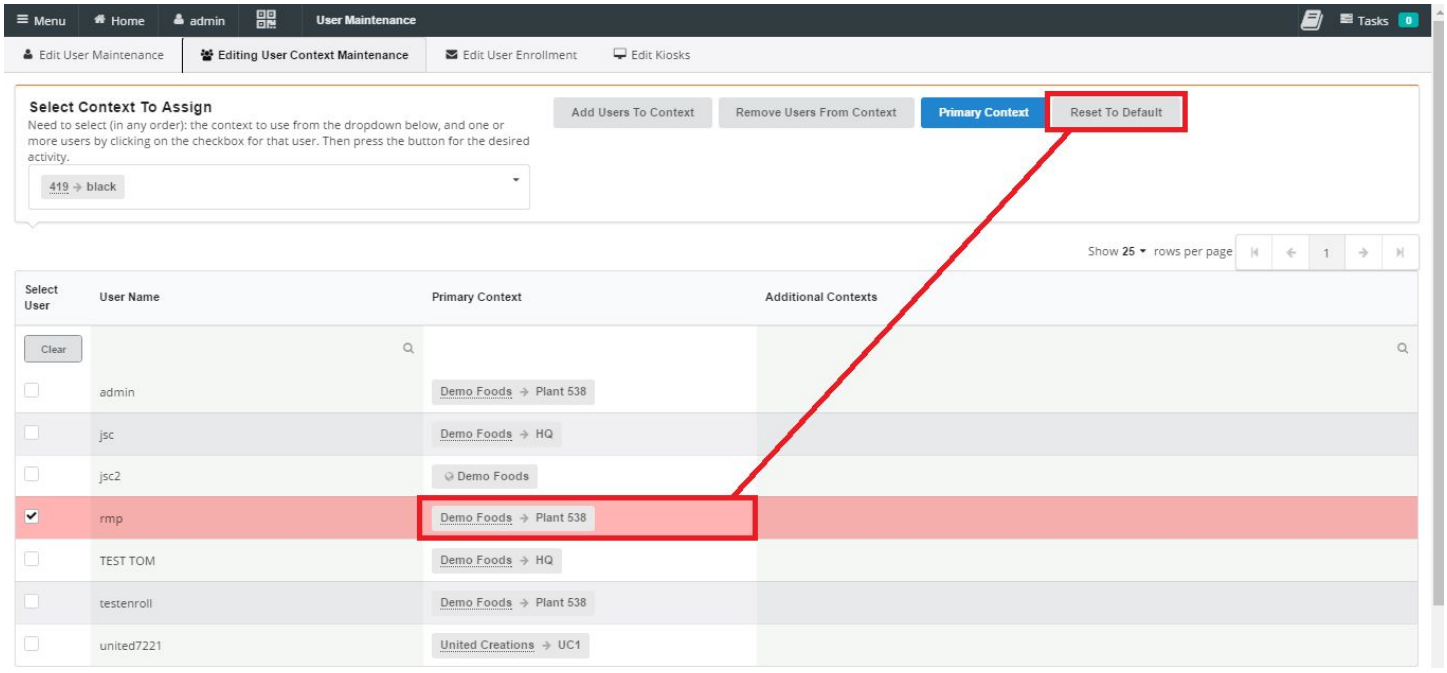


Setting primary contexts.



Resetting to Default





User Enrollment Maintenance

Roles Role Permissions Needed	
Role Value	**Role Name**
userAdmin	User Administrator

Group Management

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

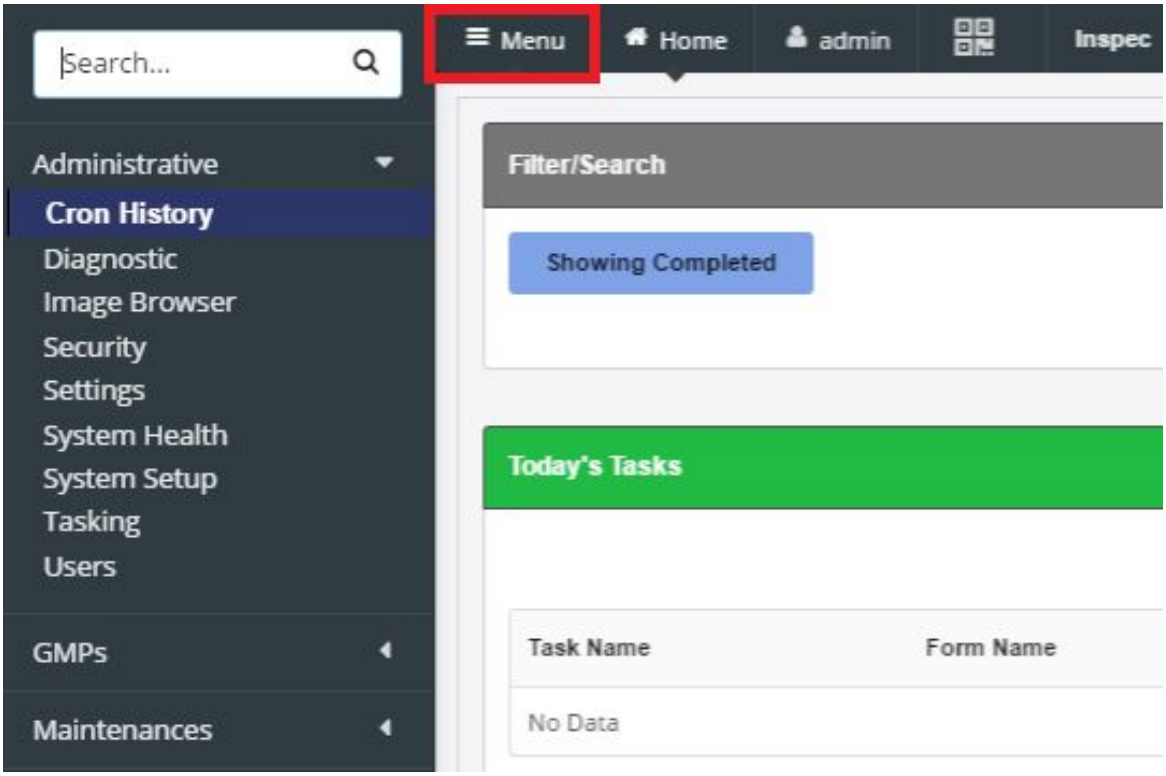
Other Roles:

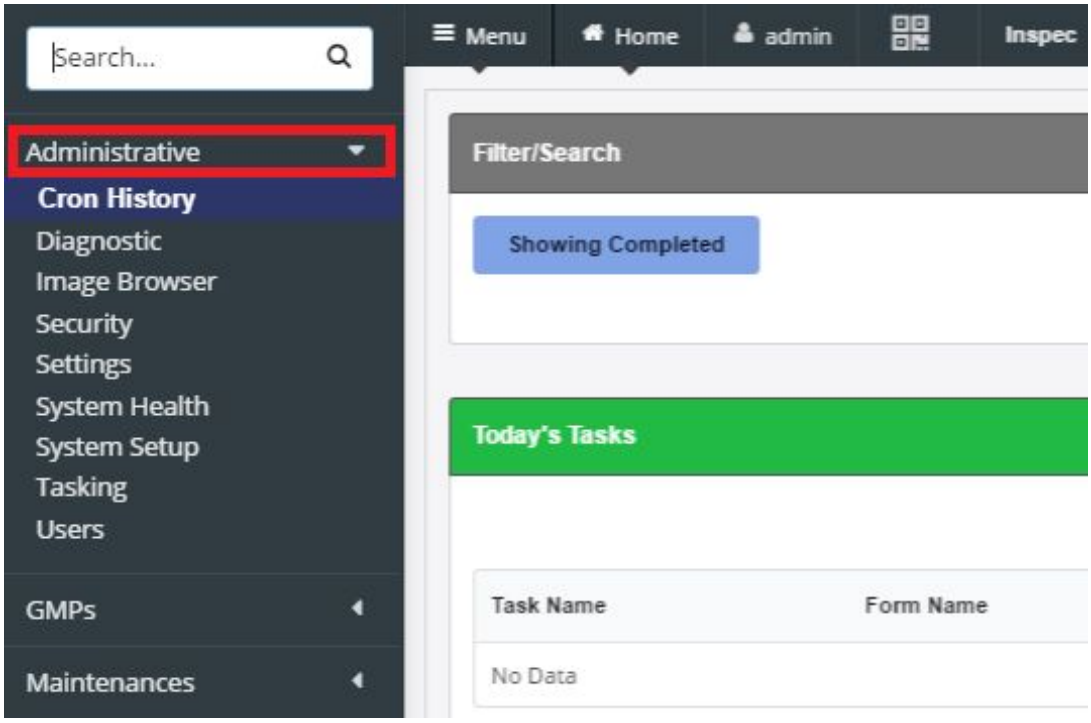
- User (Default)
    - reopen forms
- Global Sticky Role (Thumb-tack feature)

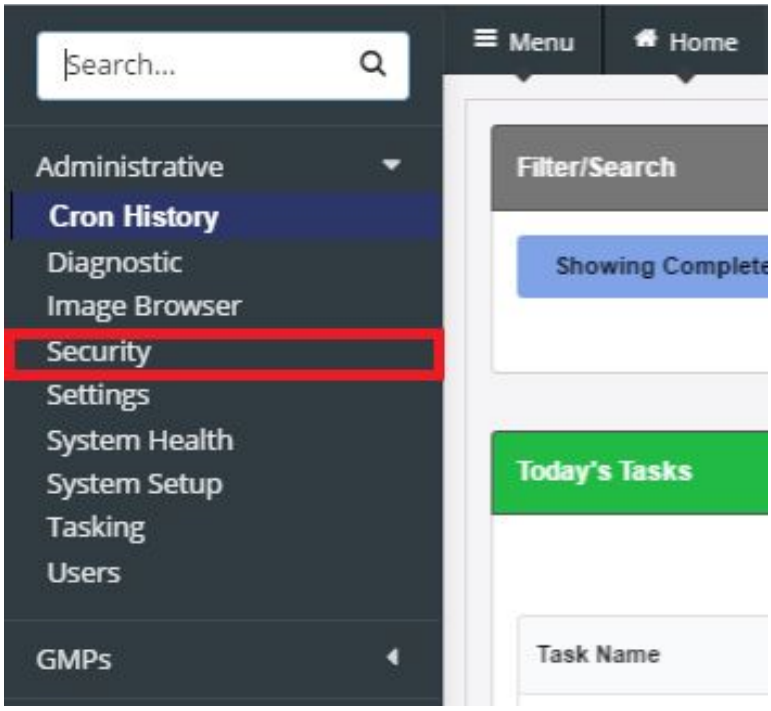
- Reopen Forms Role (make this a super-cede to the "reopen forms" role.)
- Approval Role (make this a super-cede to the "approver" role.)

See the “Security Window”

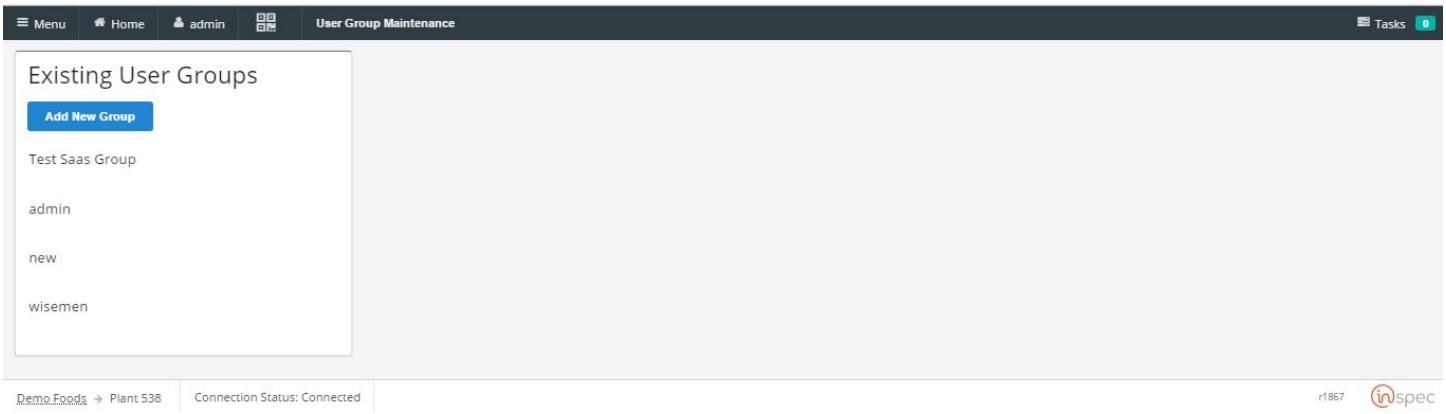
To get to the user context maintenance select the <Menu> slide-out. Select the <Administrative> drop-down and select <Security>.







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

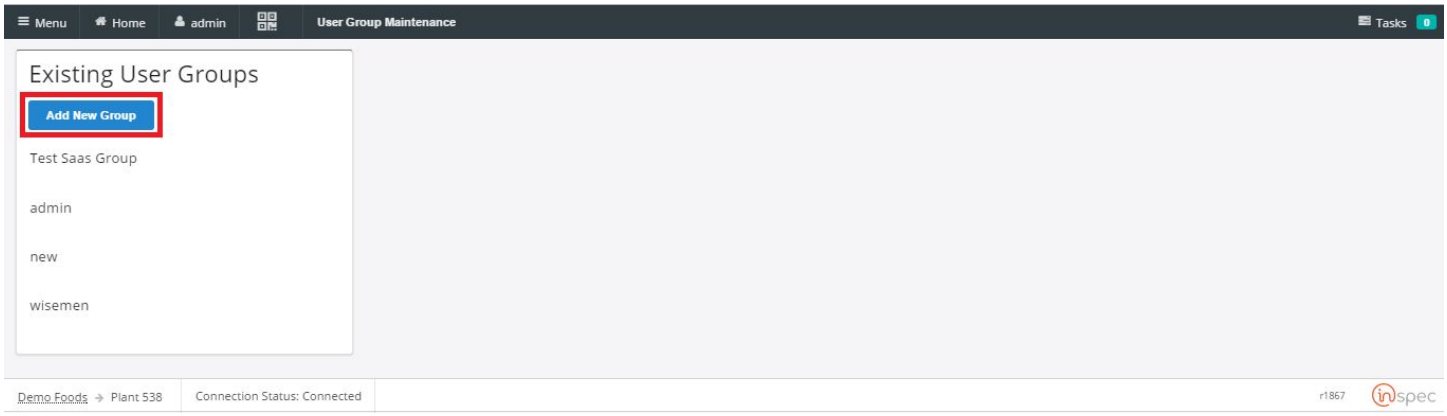


Can see and access /qc/review (Form Review) window (to be placed in the Maintenance menu) (example: http://qcproduction.coolearth.com/qc/review)

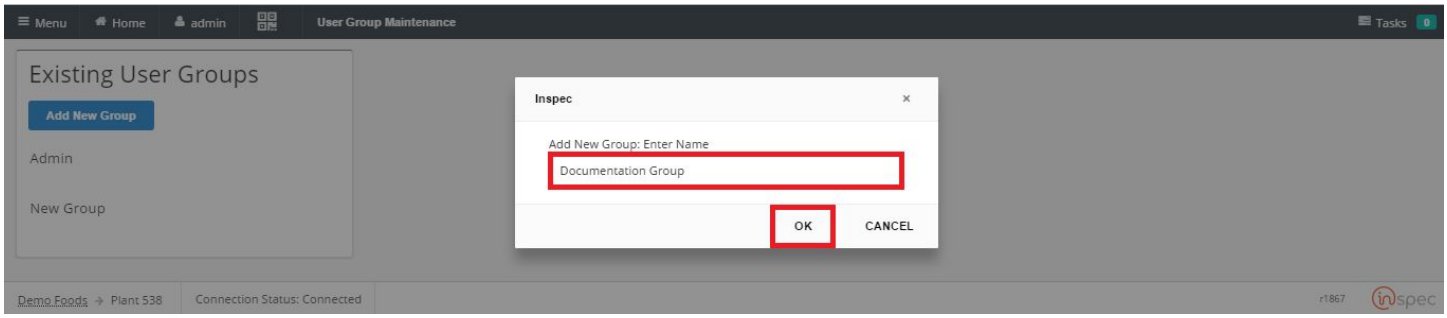
Group Administration

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

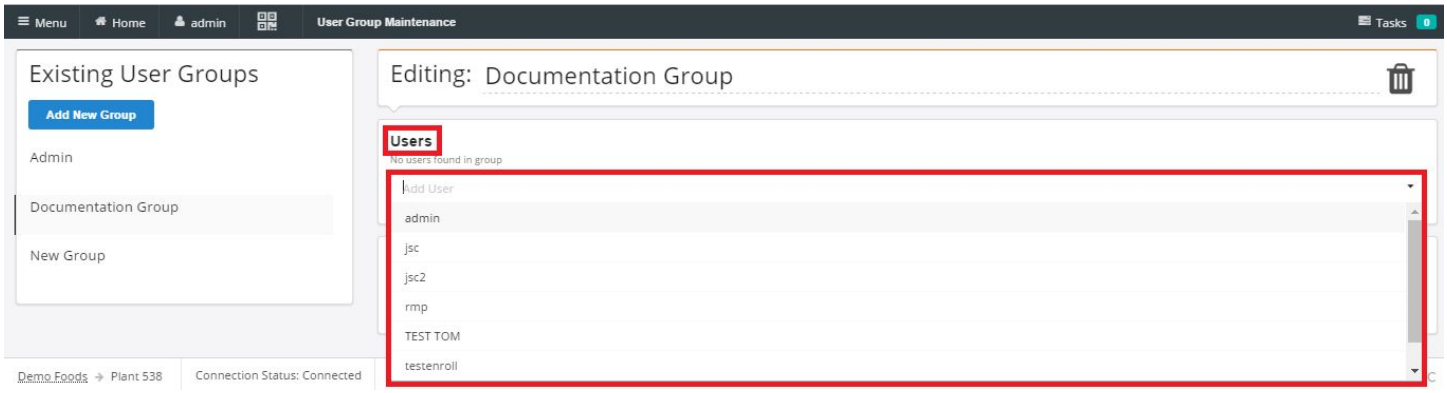
To create a new group, select <Add New Group>

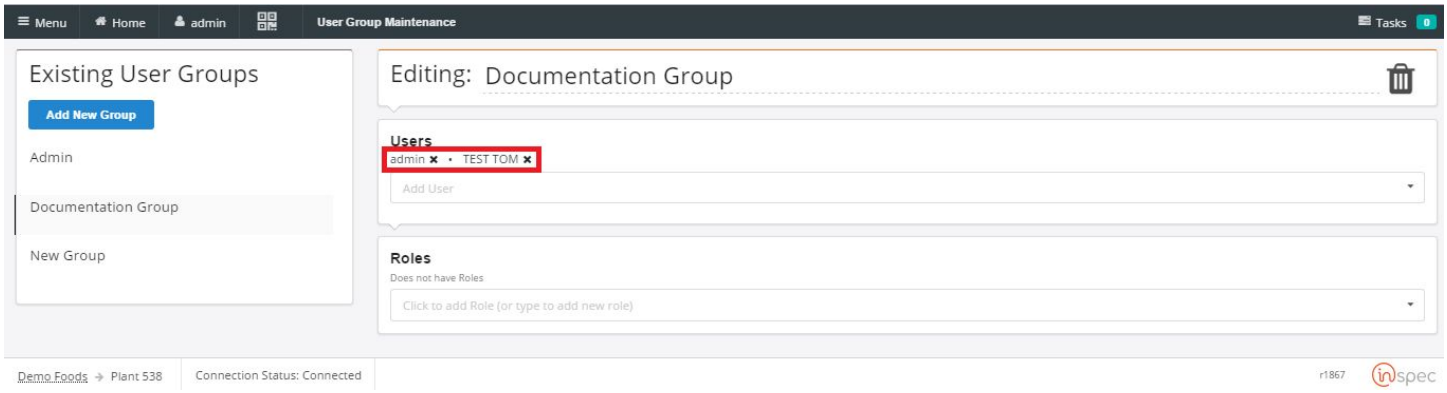


Enter a group name, and select <OK>.

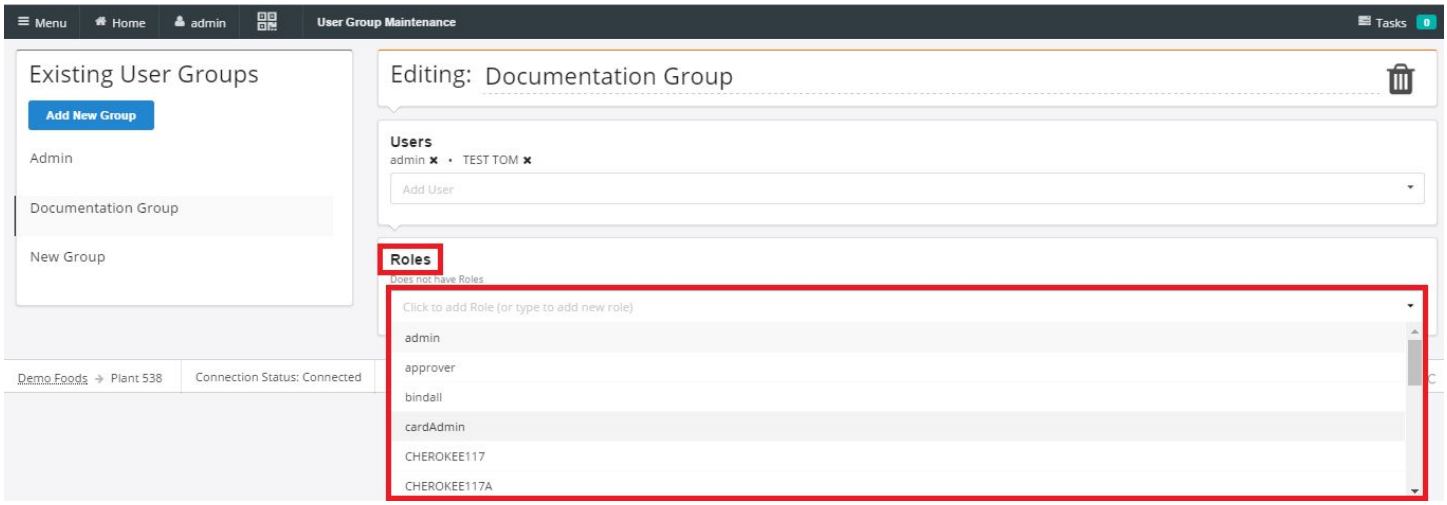


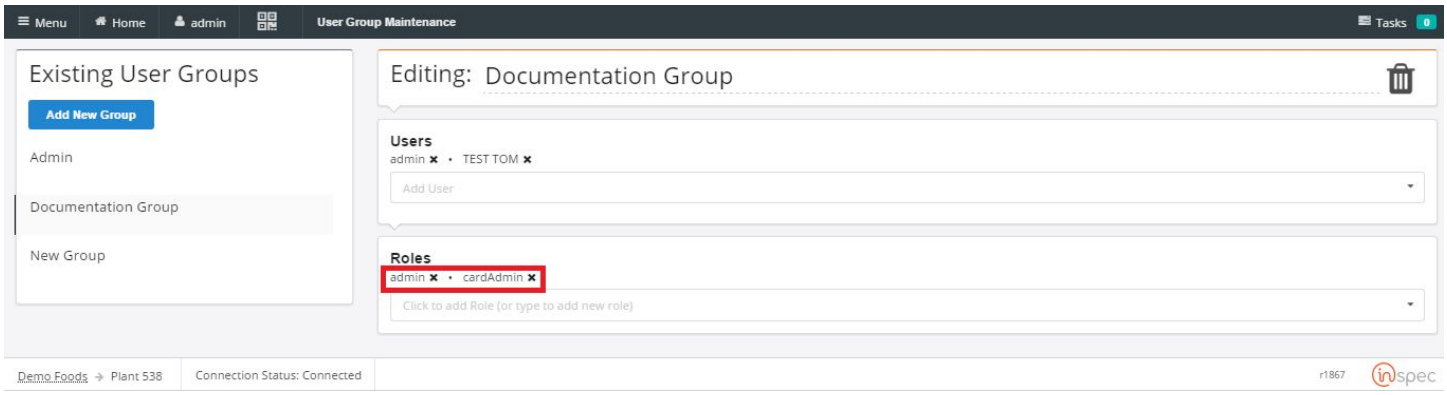
To complete the group, add users to the group via the “Users” drop-down.





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



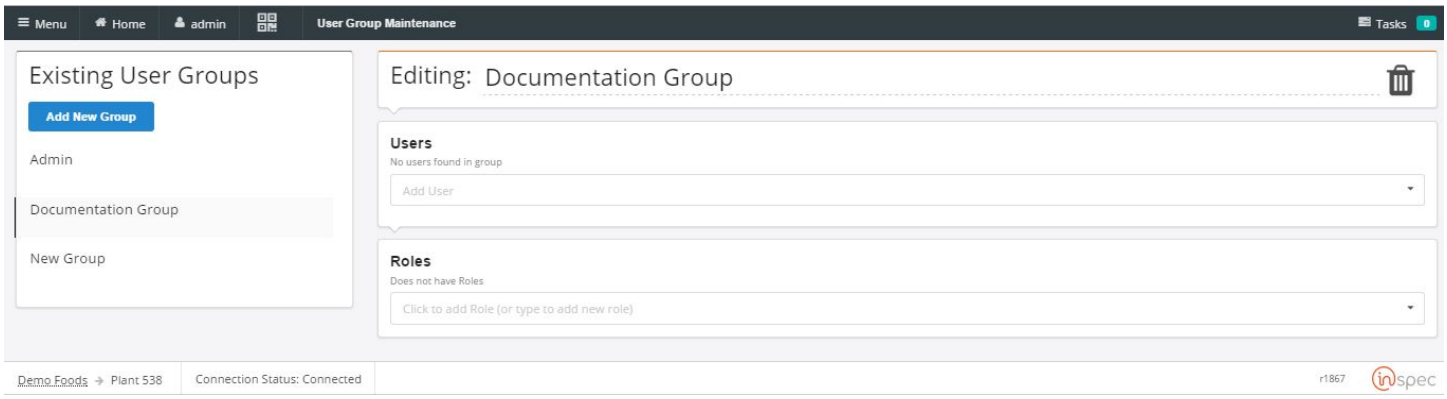


Deleting and editing existing groups can also be completed in the group management screen.
To delete existing groups, perform all the steps listed above to get to the group management screen and to access an existing group.

How to Edit a Group

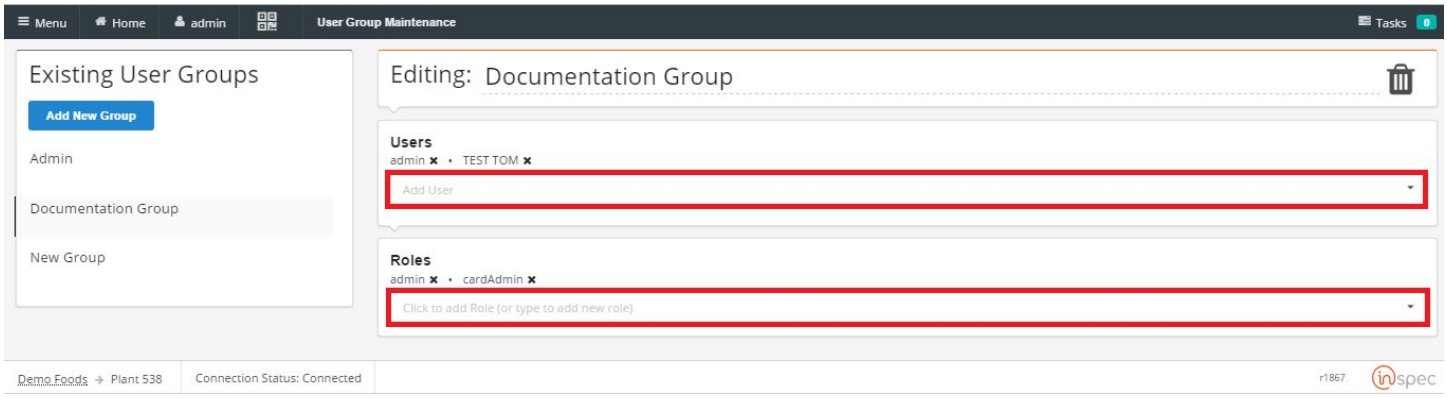
Once in the groups screen, the user can select an existing group by selecting the name of the desired existing group.

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

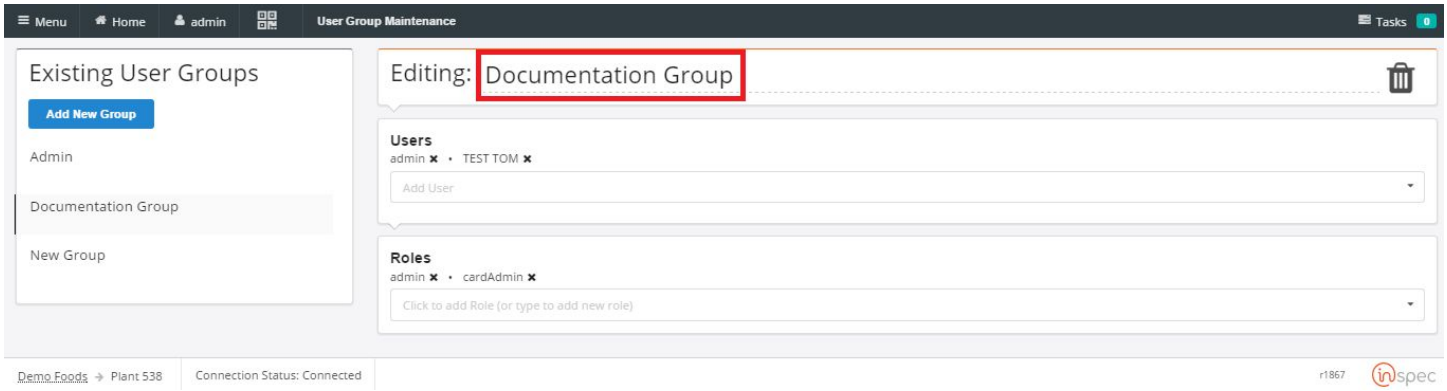


To edit the form name, users, or roles toggle the drop-down menu or edit the group name.

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.

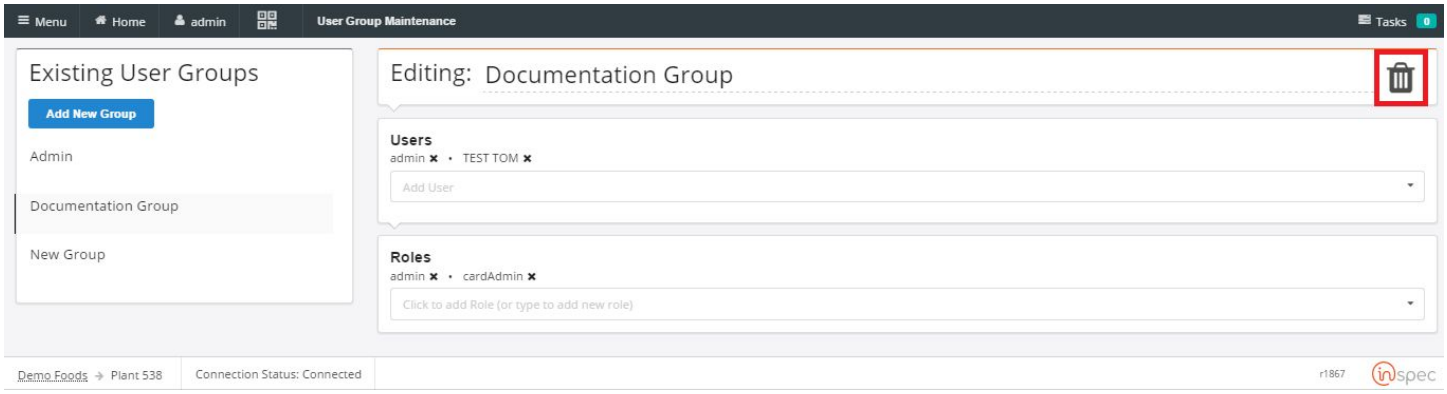


This figure shows the field that the group's name will appear to be edited in. To edit the name, select the field, highlight the name and write over the existing name with the name desired.



How to Delete a Group

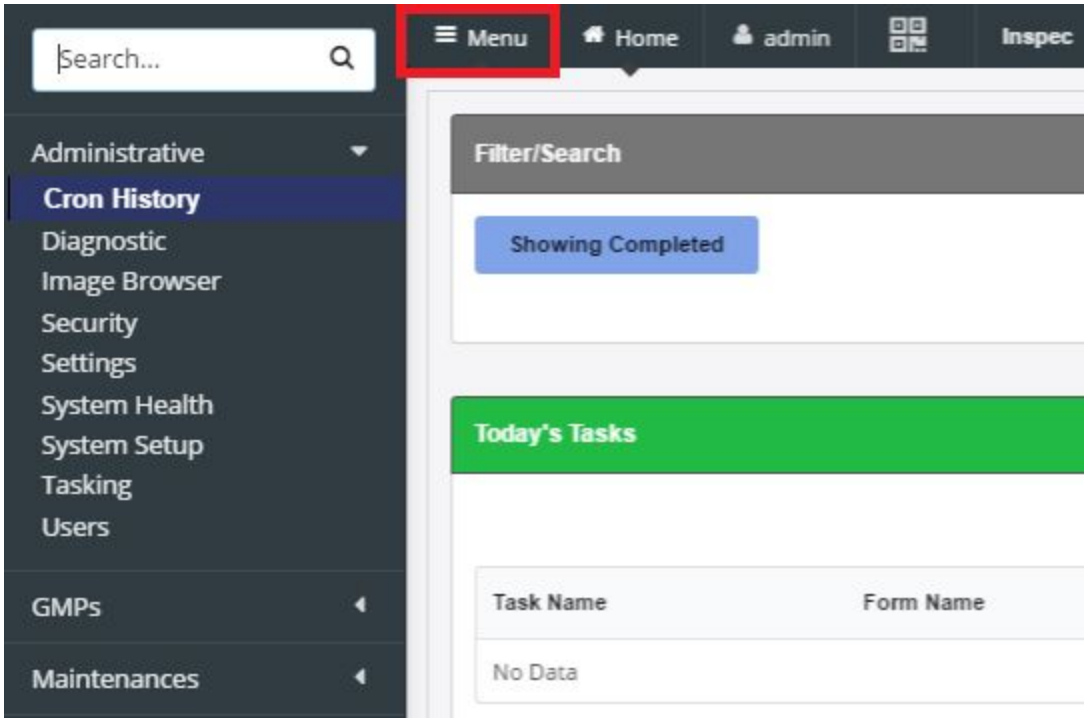
To delete the group select the trash can icon that appears in the editing screen.

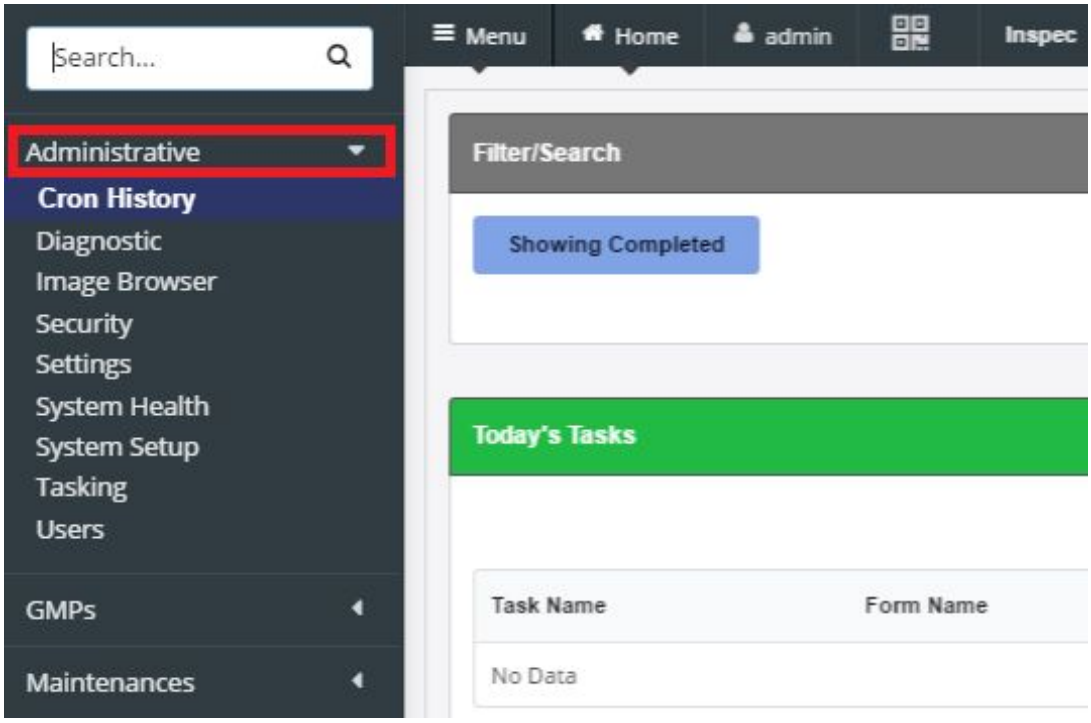


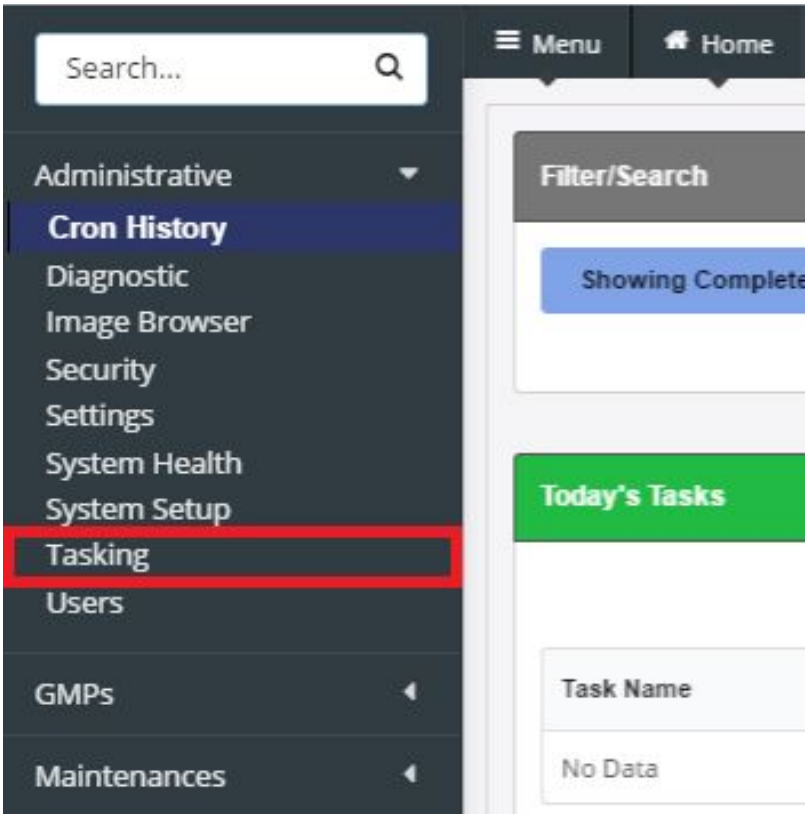
Tasking Management

Roles 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>.




Search...
Menu
Home
admin
Inspec
Administrative
Cron History
Diagnostic
Image Browser
Security
Settings
System Health
System Setup
Tasking
Users
GMPs
Maintenances
Filter/Search
Showing Completed
Today's Tasks
Task Name
Form Name
No Data


Search...
Menu
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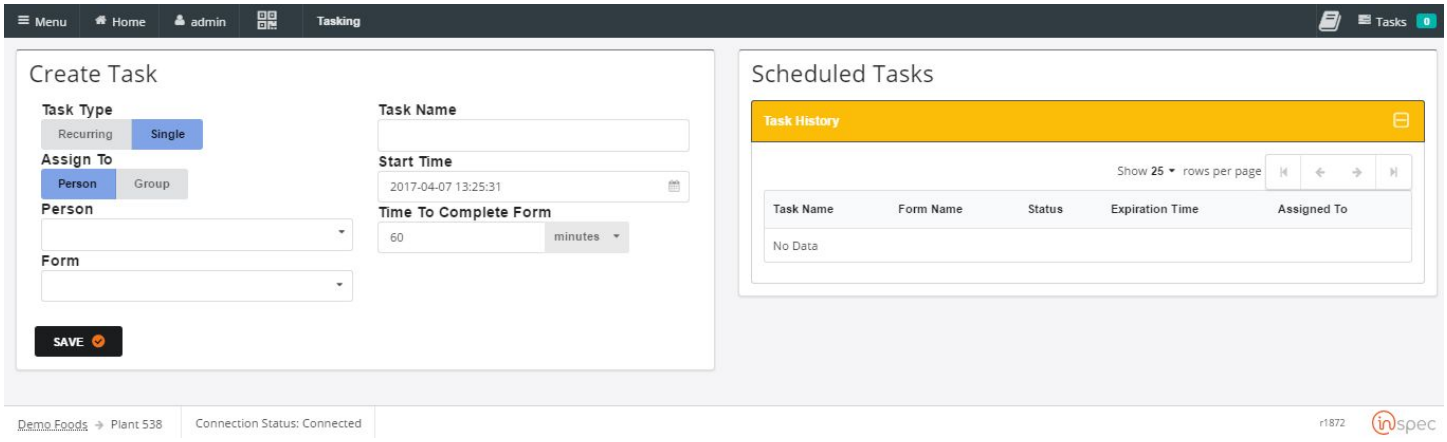
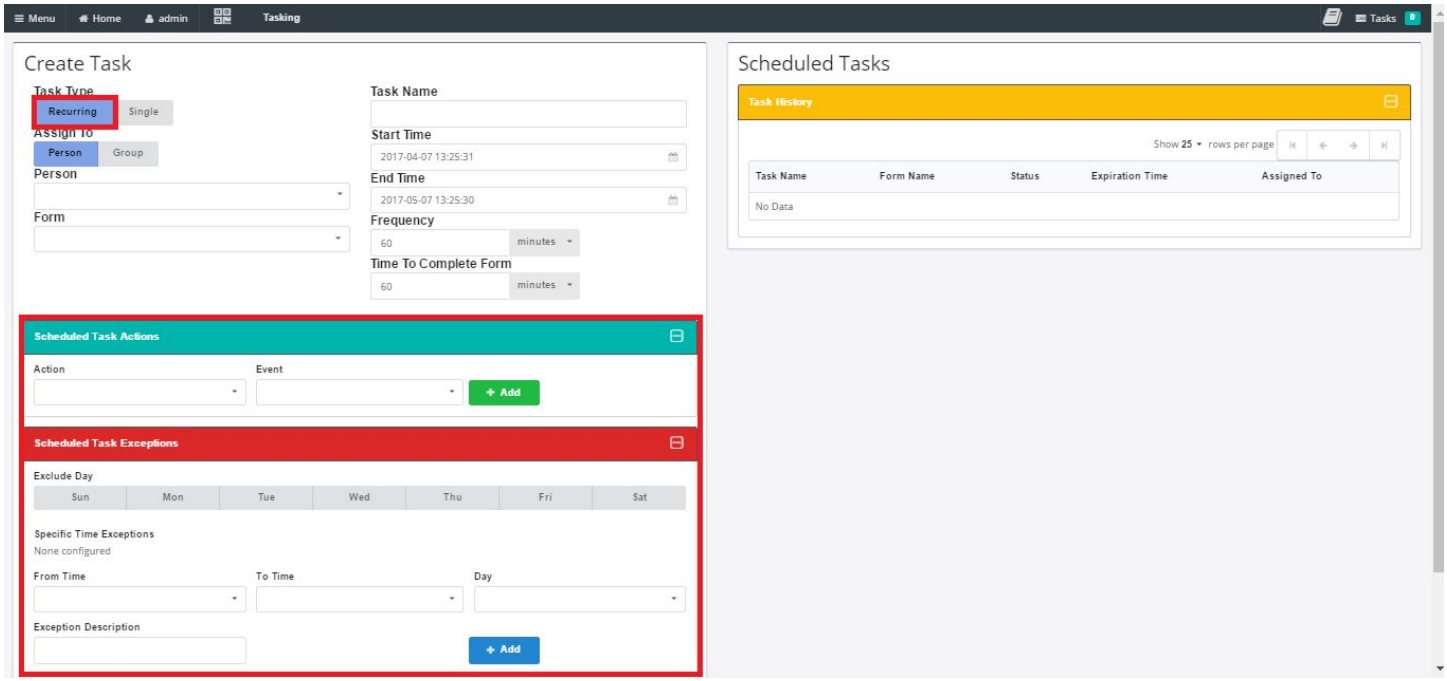
Filter/Search
Showing Complete
Today's Tasks
Task Name
No Data



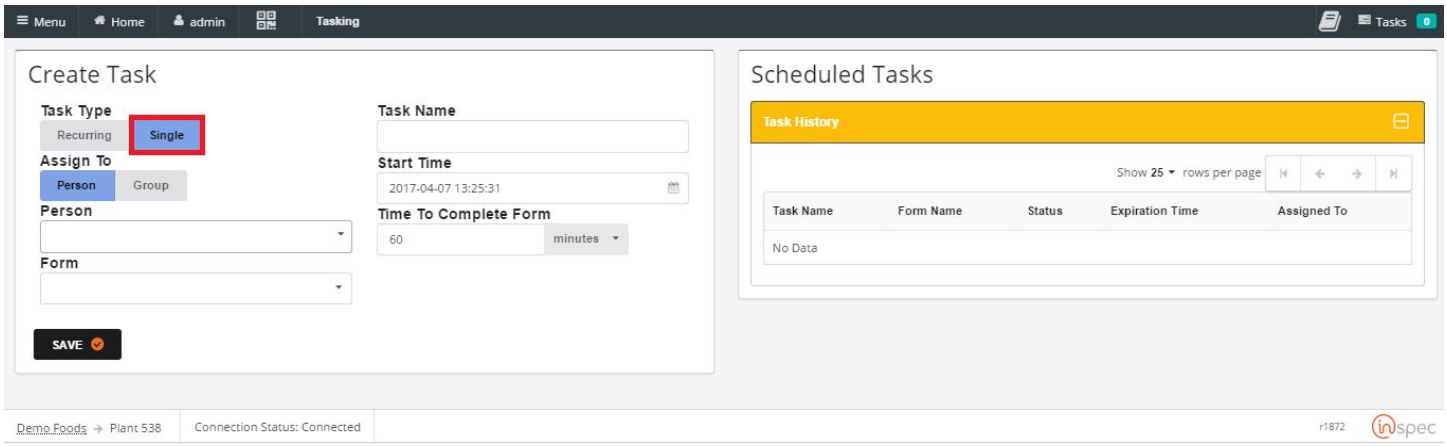
To create a task,

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

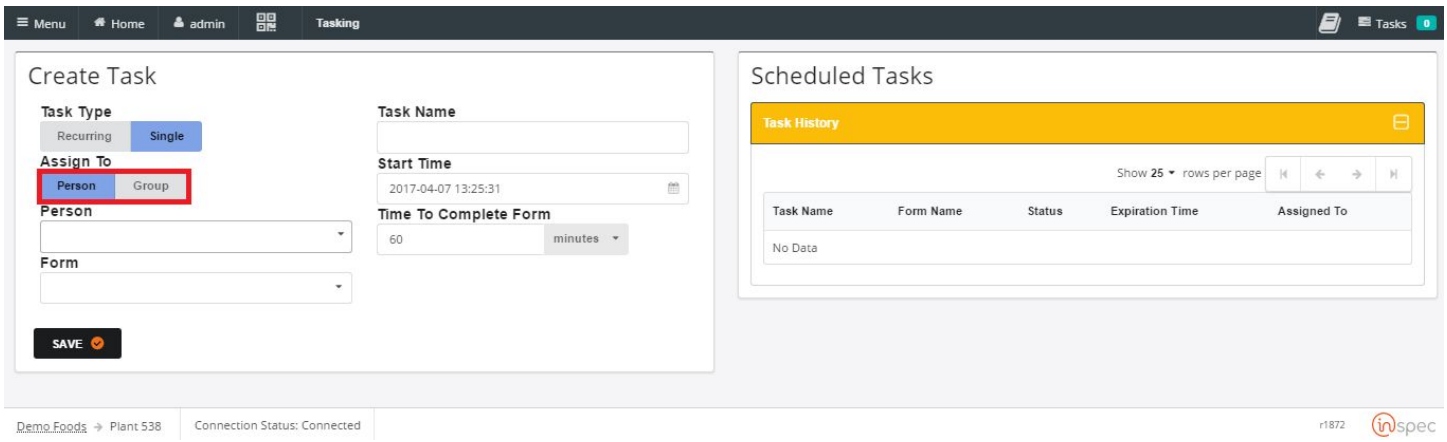
“Recurring” will make the task repetitive on a scale set by the user in the screen prompted after selecting “Recurring”.



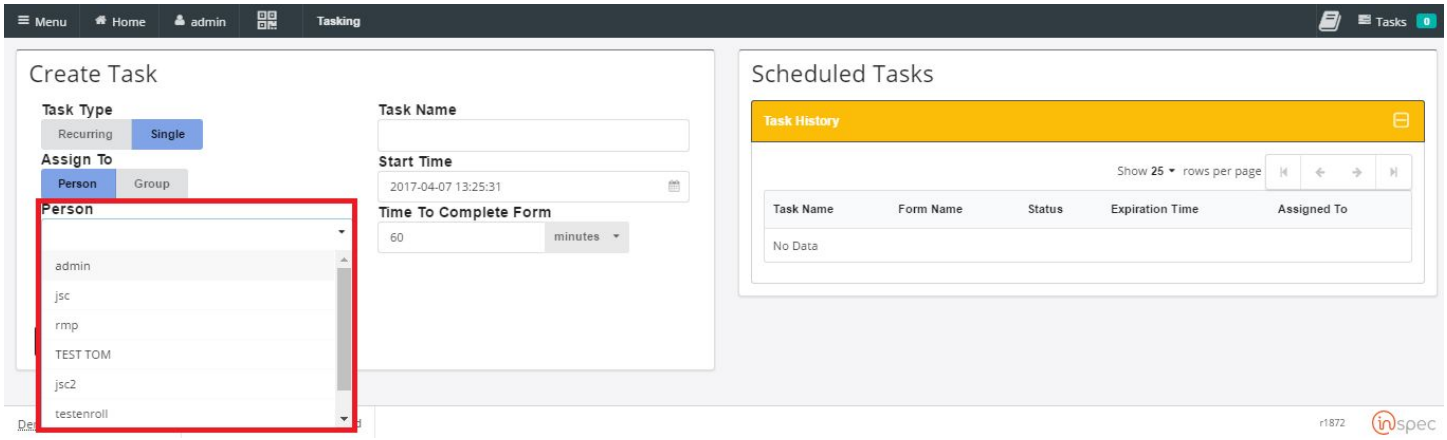
“Single” will make the task a one time only function that occurs when the user sets it to.



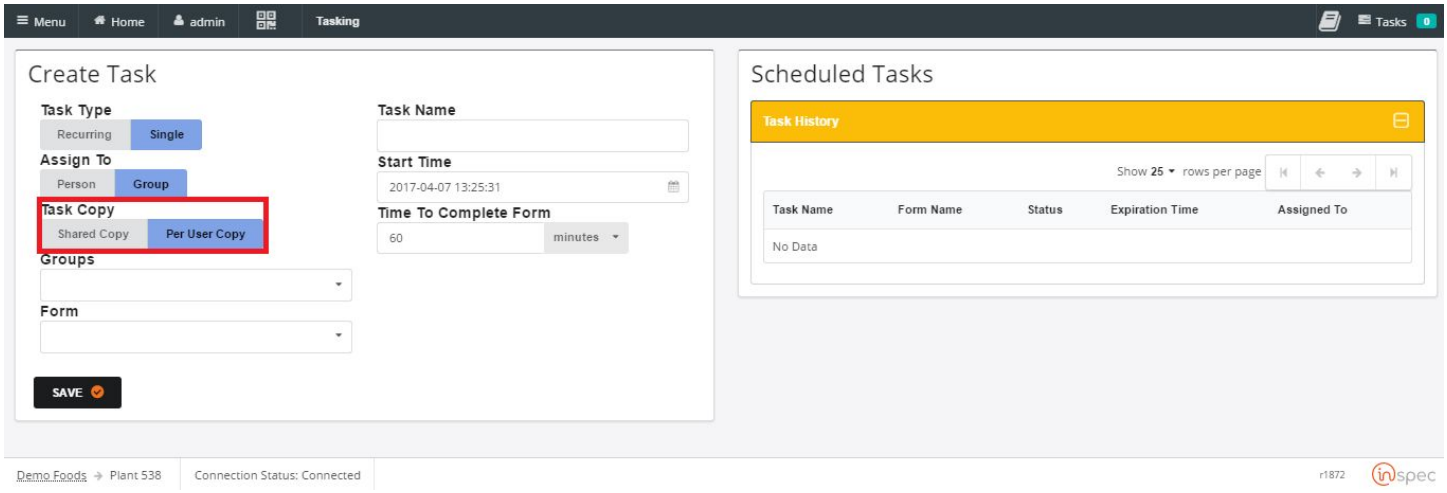
Next, Select who to assign the task to with either the <Person> or <Group> actions.



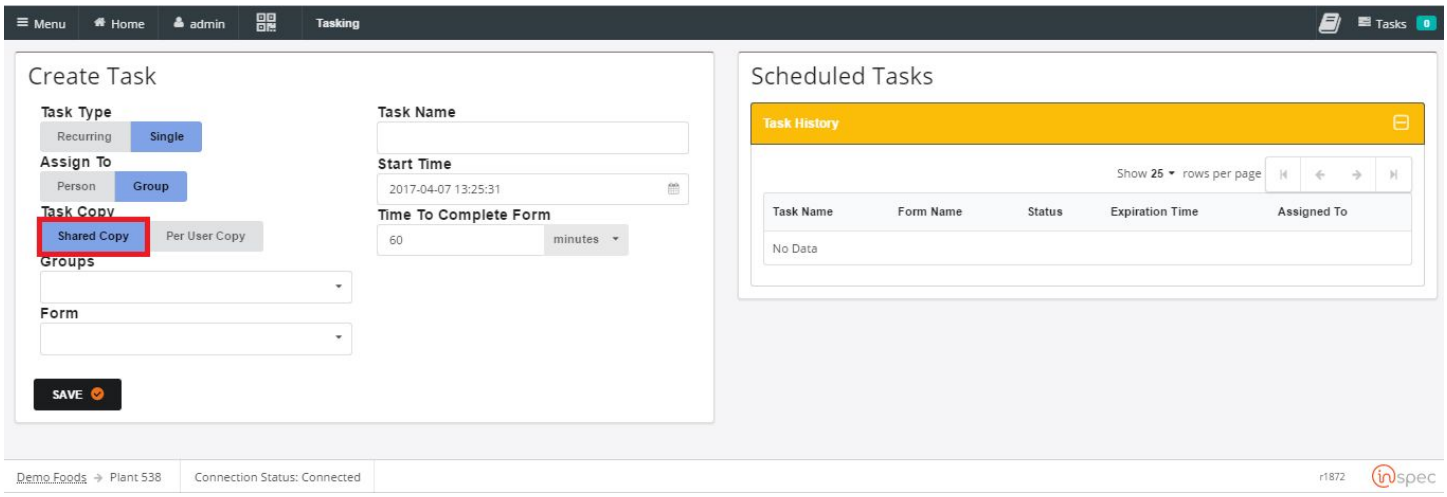
“Person” will present a “Person” drop-down menu that will prompt the user to select the name of a user for the task to be assigned to.



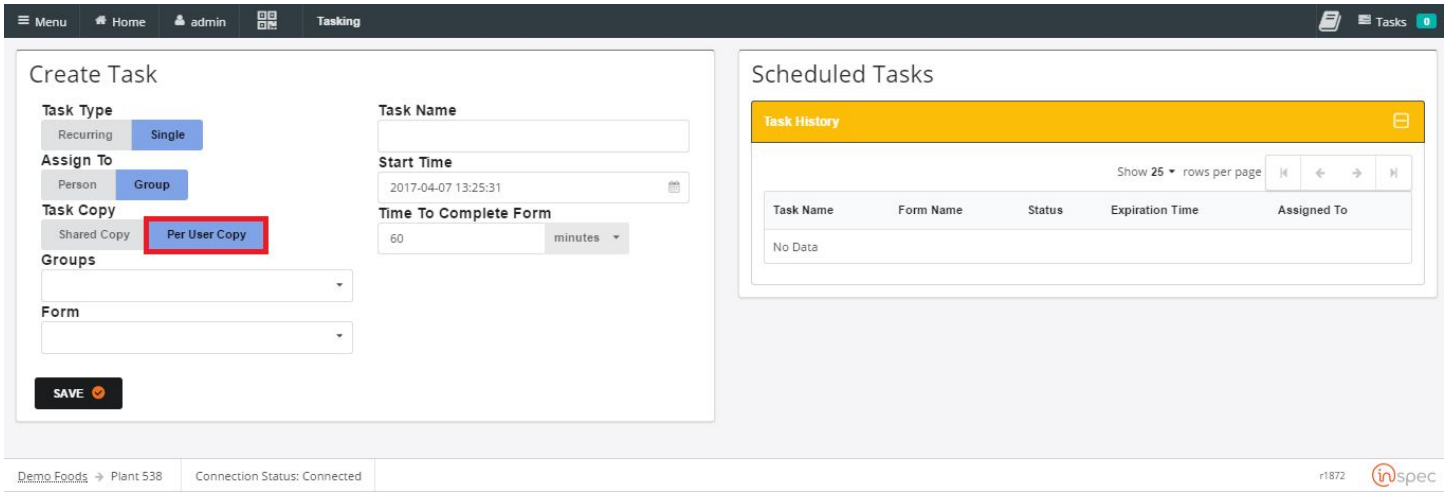
“Group” will present a drop-down menu for the user to choose the group to assign the task to. Selecting “group” will also populate a “Task Copy” button-bar, with the actions of <Shared Copy> or <Per User Copy>.



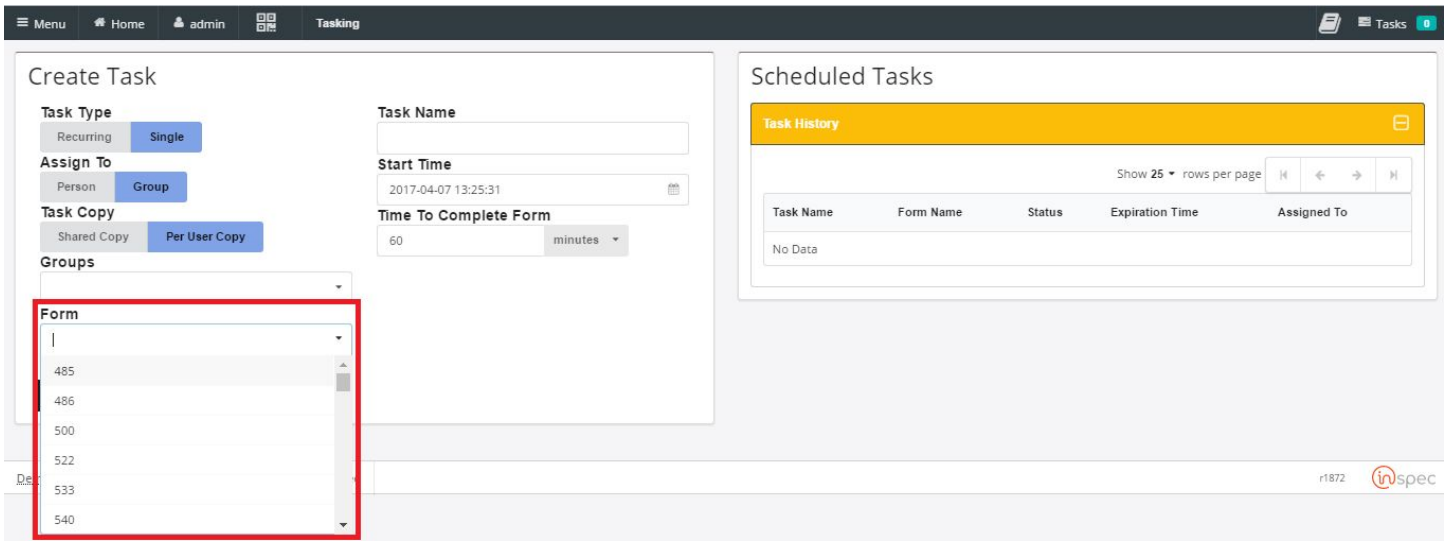
Selecting “Shared Copy” will create one task screen for every user in the group to work in.



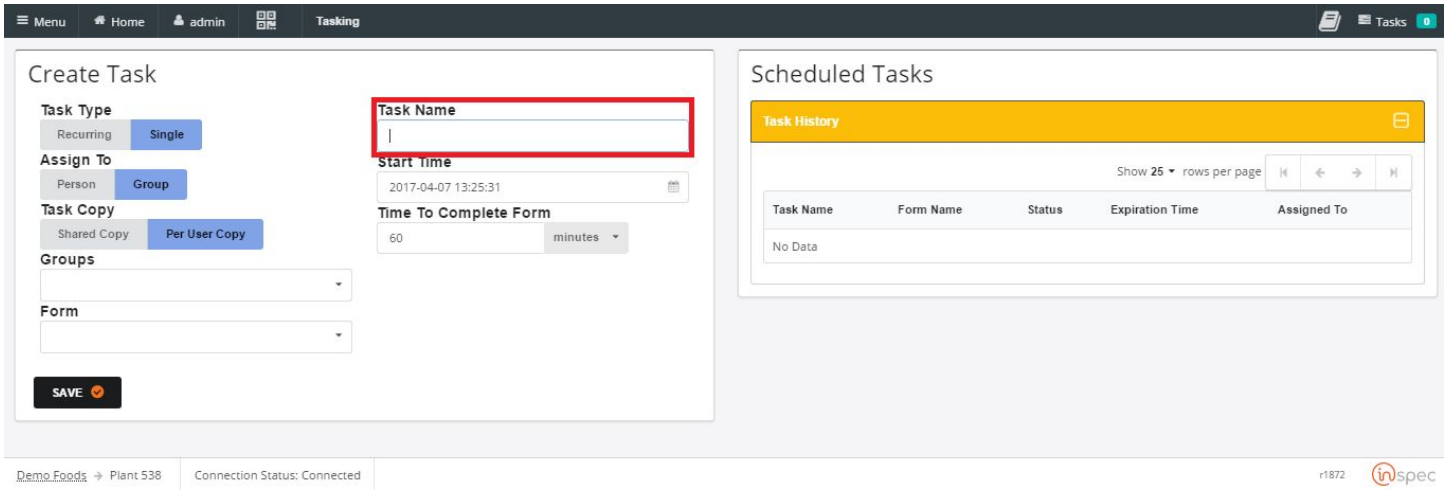
Selecting “Per User Copy” will distribute a copy of the task to every user in the group to work on individually.



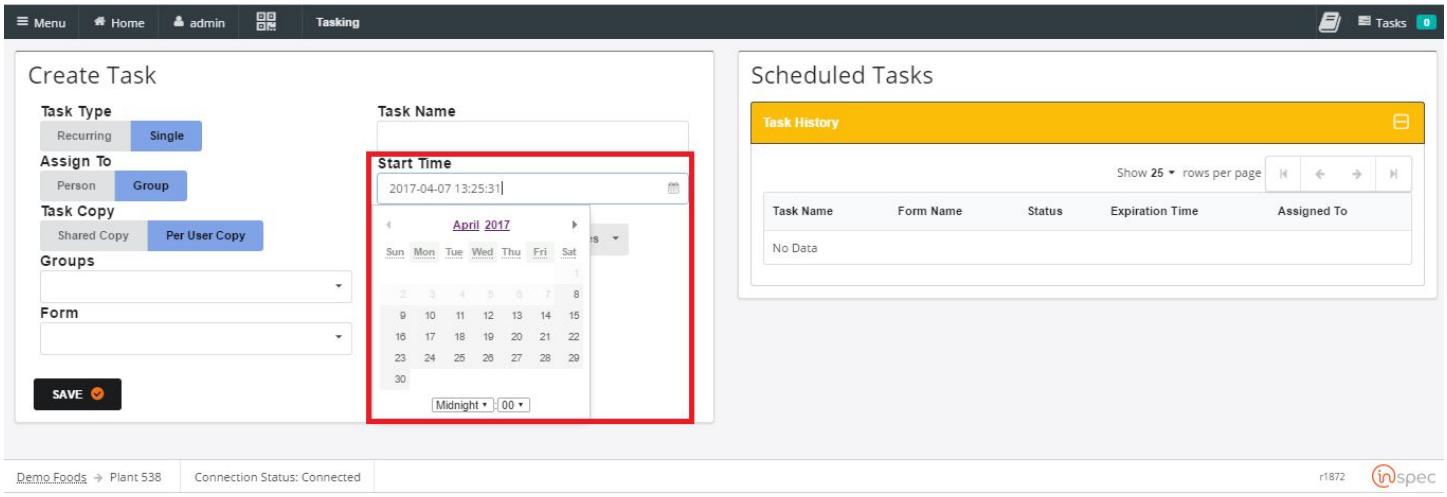
Select the form the user wishes to complete with the task, using the “form” drop-down.



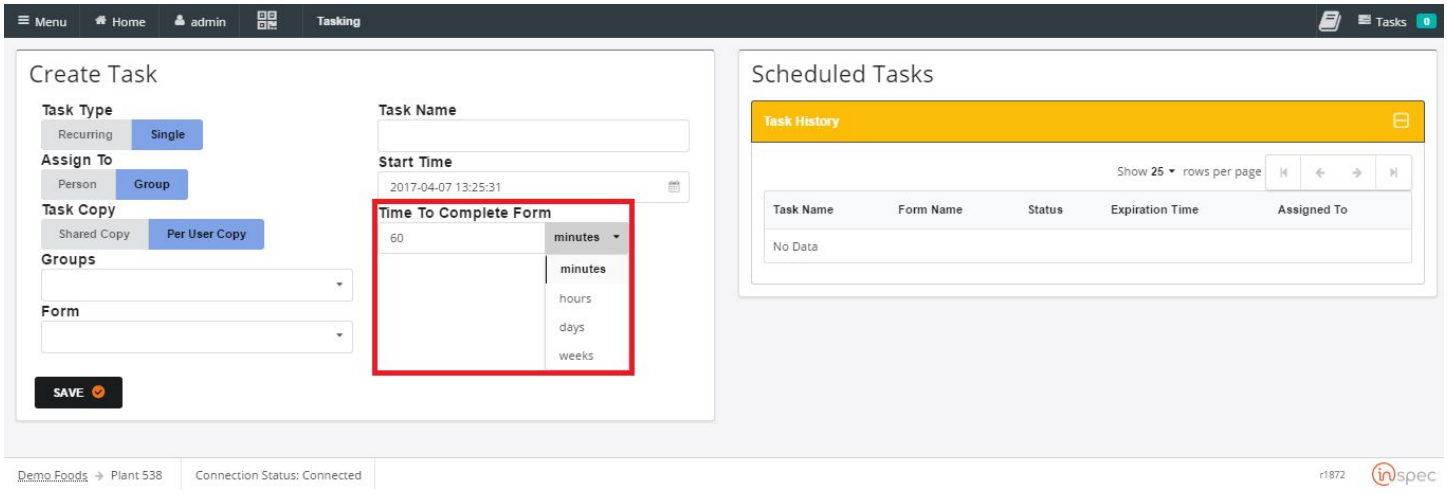
Name the task in the “task name” field.



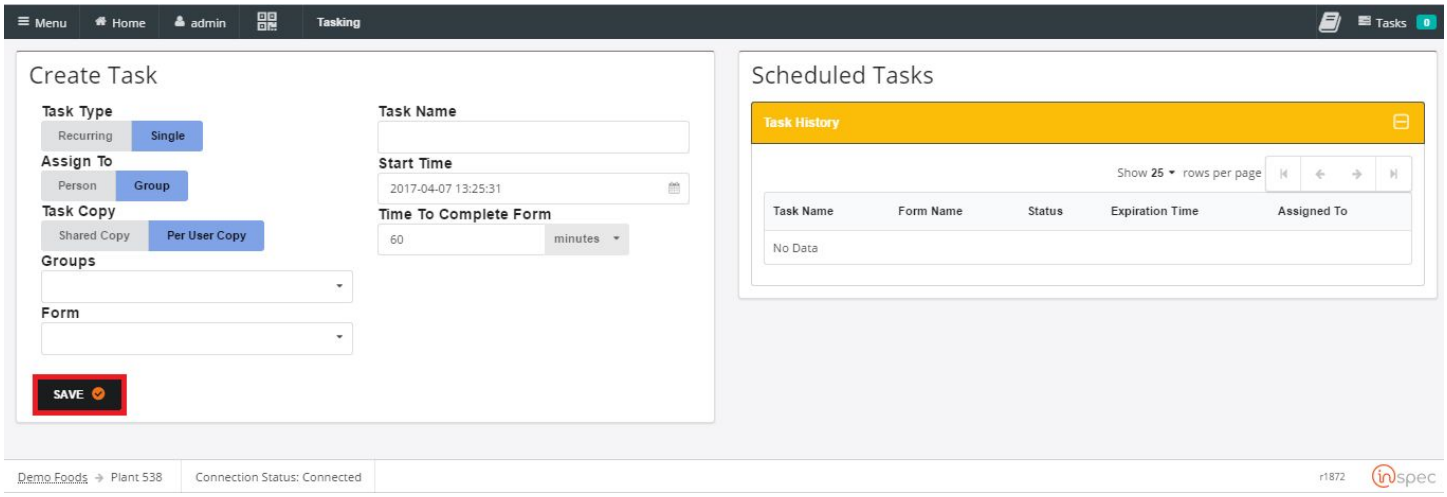
Select a start time with the “date and time” field.



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



Lasty, save the task to complete tasking.



UAT (User Acceptable Testing) Management

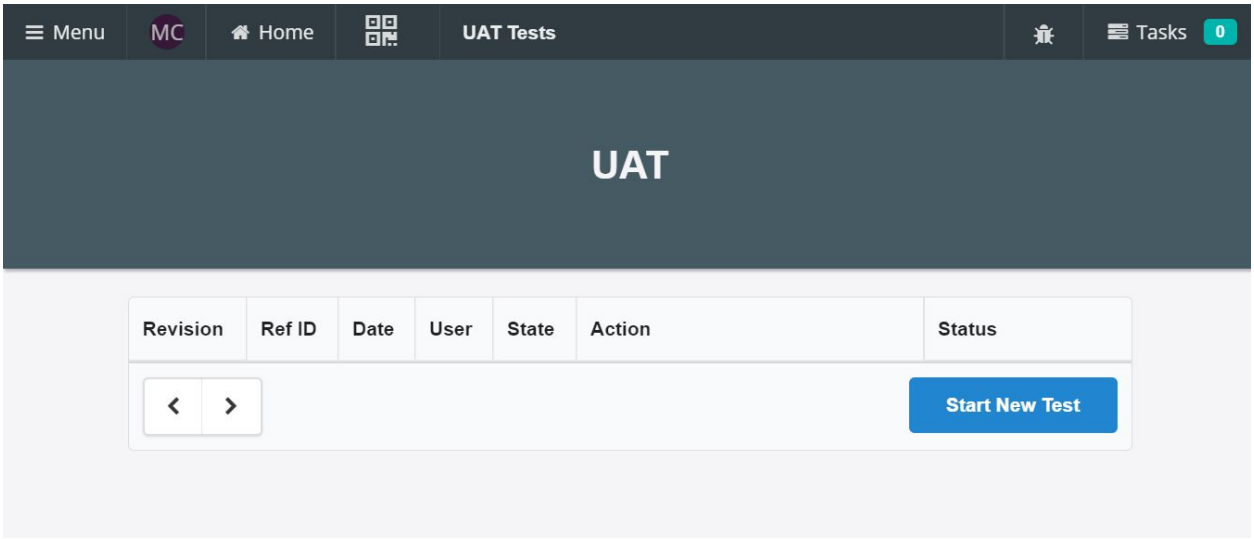
Roles

Role Permissions Needed

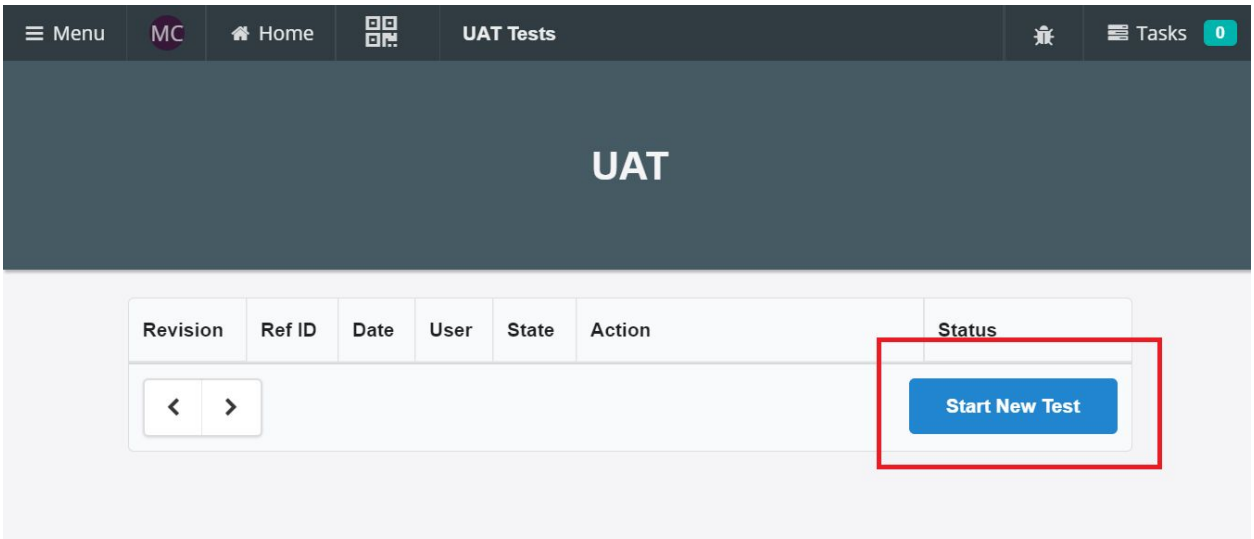
Role Value	Role Name
uatAdmin	UAT Administrator

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

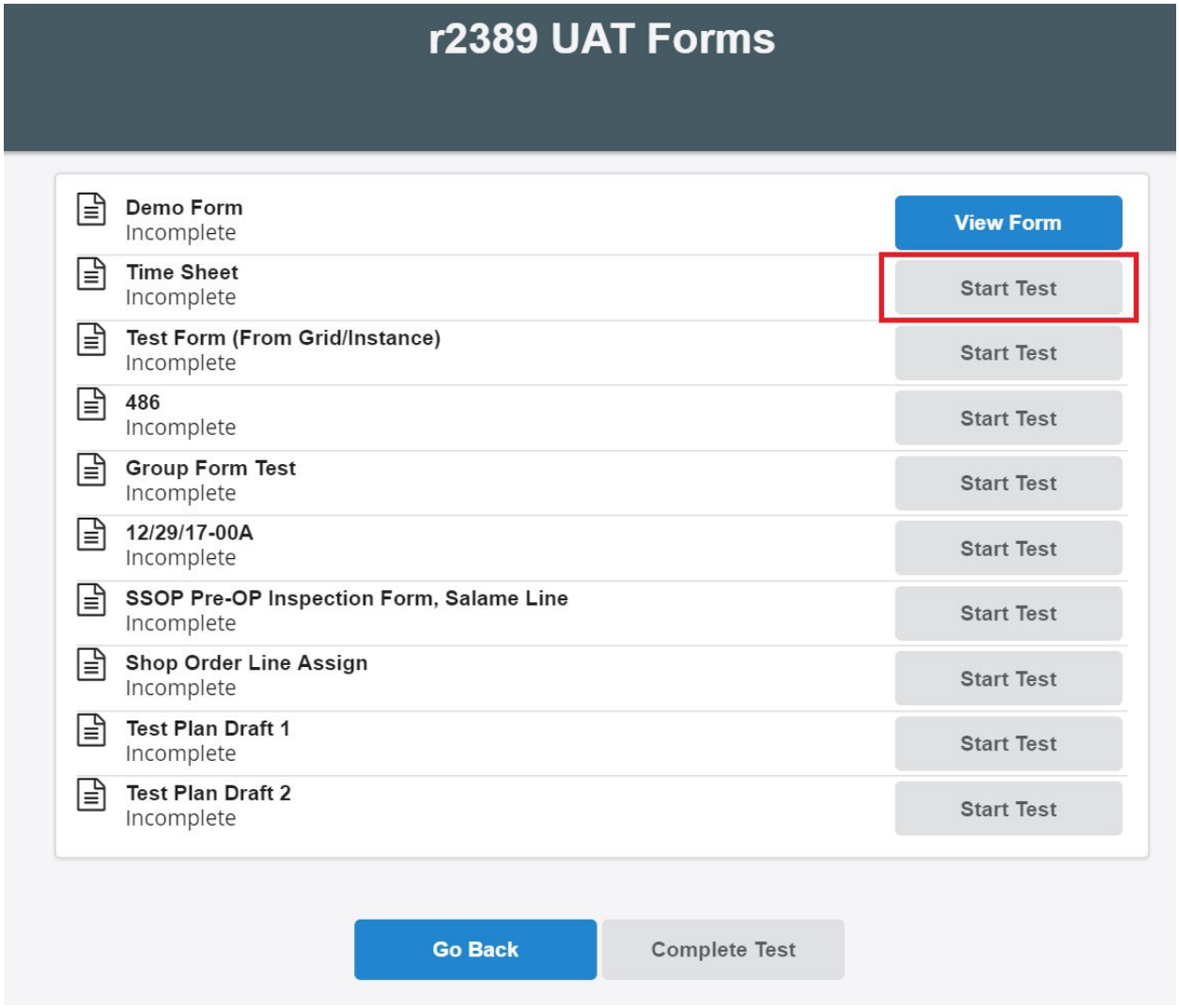
To get to the UAT testing page in Inspec, select the <Menu> slide-out. Select the <Administrative> drop-down and select <UAT>. Make sure the uatAdmin permission is enabled for the user attempting to access the UAT menu.



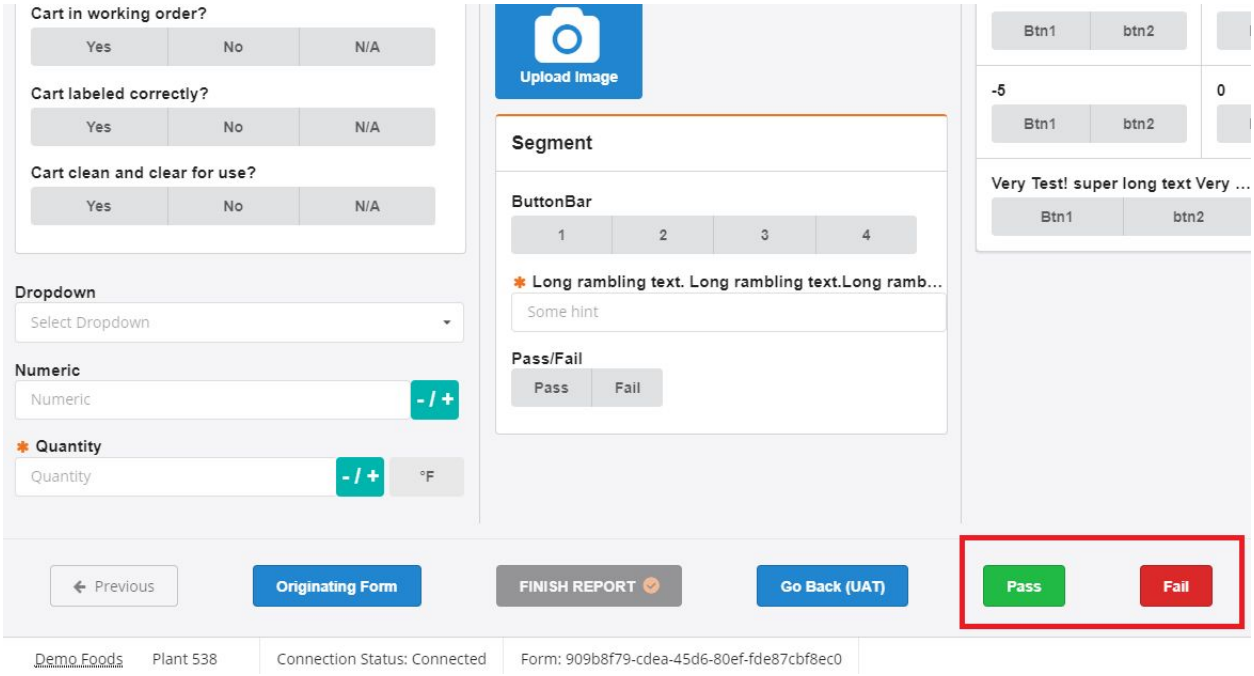
Select the <Start New Test> button, this will populate a list of the 10 most used forms for your installation.



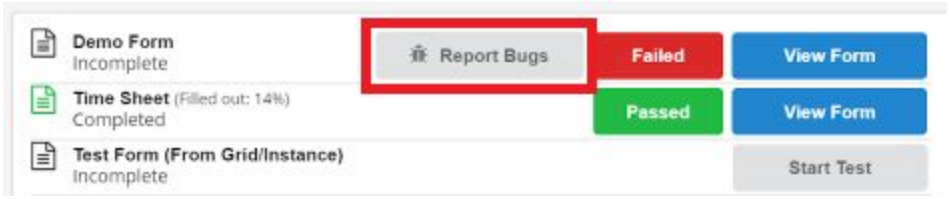
After the list has been presented the user can begin to test each form, by selecting <Start Test>, and work through them to determine operability of the specific Inspec build being test.



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>.



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



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

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