



GoPlant User Manual

Version 2024.4







Table of Contents

| Getting Started with GoPlant4 | |
|---|--|
| Online Client Startup4 | |
| - Minimum system Requirements4 | |
| Mobile Application Startup | |
| Using the Website Client | |
| Navigating to the GoPlant web site and login [All user roles]6 | |
| Customizing and Managing widgets on the dashboard [All user roles]7 | |
| Online Client Manager Interface Tabs [Admin, Editor]9 | |
| GoPlant – Creating and Modifying GoPlant Data11 | |
| Storage Groups – the hierarchical structure [Admin]11 | |
| Editor Security Permissions (Storage Group Level) [Admin]15 | |
| User Settings | |
| Adding Users [Admin] | |
| - Editor Security Permissions (Users) [Admin]23 | |
| Adding User Groups and Associating Users [Admin]25 | |
| Creating Assets [Admin, Editor] | |
| Asset Import [Admin, Editor] | |
| Building and Publishing Forms [Admin, Editor] | |
| - Working with Triggers in the Form Designer [Admin, Editor] | |
| - Defining Exceptions and Conditional Formatting | |
| - Working with Visibility Rules in the Form Designer [Admin, Editor] | |
| Working with Default Visibility Rules in the Form Designer and Form Tools [Admin, Editor]60 | |
| Form Import73 | |
| - Working with the Excel Template for import76 | |

GOPLANT



| - Working with CSV Template | |
|--|-----|
| - Critical Errors | |
| Forms Tab view – Version Information | 92 |
| Creating Rounds with Asset/Form or Form Elements [Admin, Editor] | 94 |
| - Rounds Tab – Version Tracking | 103 |
| Creating and Scheduling Tasks [Admin, Editor] | 105 |
| - Tasks Tab – Version Tracking | 110 |
| Running Reports [All User Roles] | 113 |
| Linked Resources | 116 |
| External Tags | 116 |
| External Tags – Tag Source Types | 117 |
| External Tags – Tag Management | 121 |
| Managing Tasks [Admin, Editor] | 127 |
| Task Management Widget | 129 |
| Task History Widget | 131 |
| Performing Supervisory Reviews [Reviewers] | 135 |
| Creating Reports and Trend Charts [Admin, Editor] | 140 |
| Creating a GoPlant User Defined Report | 140 |
| Creating a GoPlant Chart | 142 |
| Print Blank Forms, Rounds, Tasks | 143 |
| Print Blank Forms | 143 |
| Print Blank Rounds | 152 |
| Print Blank Tasks | 156 |





Getting Started with GoPlant

Online Client Startup

GoPlant uses a tablet for field operations and a desktop browser for administration and reporting. To get started using GoPlant, you should first login via the desktop web browser. Prior to accessing the system, make sure your computer and web browser meet the following the minimum requirements:

- Minimum system Requirements

- A network connection to your Premise or Hosted GoPlant website.
- A desktop web browser such as Google Chrome, Firefox, Microsoft Edge, or Safari.
- Your GoPlant login and password from your system administrator. If you have not been given one and you are the first person to login, a default username is "starthere" with a password of "pass1". This account is typically disabled after set-up, so please check with your administrator.
- The GoPlant web site address (URL). This address may start with either http:// or https://.
- Recommended: Printer connected locally or accessible via the network for printing forms and reports.

Mobile Application Startup

- Download and install the GoPlant Mobile application on your device if it is not already installed using the instructions in the GoPlant Operator User Manual (separate document). GoPlant Mobile is available on the Apple, Android, and Windows Application stores. Your IT department may have your devices locked down and unable to install from the internet stores. Please refer to your IT department for instructions to load on a locked device.
- Ensure your device is connected to a network with access to the Premise or Hosted GoPlant website.
- If this is the first time GoPlant has been accessed, the following dialog will appear:

| | (|
|--|-----|
| | |
| Welcome to GoPlant | |
| Before you can login, you must enter your Server URL. | |
| https:// | |
| | |
| Verify | |
| | |
| | |
| | SKF |





- Enter the URL associated with your GoPlant site in the dialog. You MUST have either http:// or https:// in addition to the GoPlant website URL that defines your system. For Hosted customers, it will be https:// (the default). For PREMISE customers, it could be either one.
- Press the blue Verify button at the bottom of the pop-up window.
- Ensure that 'Success Ready to Login: 200' message appears, and the button Verify button changes to "OK". If not, double check the entered value, check the device network connectivity (if connected, verify it is on a network that has access to the GoPlant website)
- Press Verify button again until GoPlant has reached the designated server.
- Instructions for operating the mobile application is found in our GoPlant Mobile User Manual. Please refer to this document for detailed instructions.

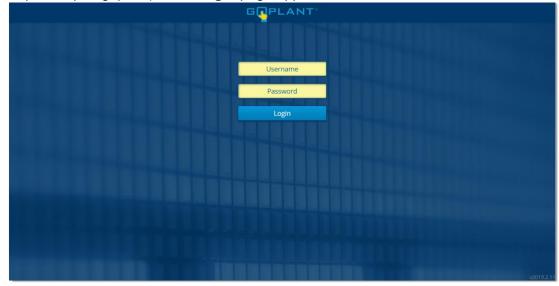




Using the Website Client

Navigating to the GoPlant web site and login [All user roles]

• Launch your desktop web browser and type your **GoPlant website URL** into the address bar (example: https://goplant). The **Login** page appears.



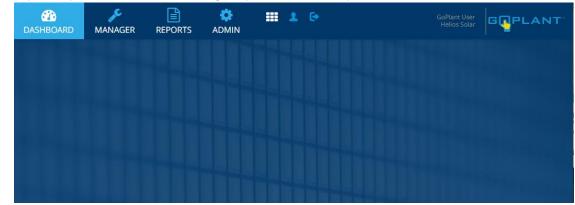
• Login by typing your **username** and **password**.







• Click Login. Your GoPlant Dashboard appears. Upon initial login, your dashboard will be empty until you customize the widgets you want displayed.



Customizing and Managing widgets on the dashboard [All user roles]

| | | CASHBOARD | کر MANAGER | REPORTS | 🔅 ADMIN | ■ 1 0 | |
|--|--|-----------|---------------|---------|------------|--------------|--|
|--|--|-----------|---------------|---------|------------|--------------|--|

• Add widget panels to your dashboard by selecting the **Manage Widgets** icon. The **Manage Dashboard Widgets** screen will appear.

| Manage Dashboard Widgets | | × |
|--------------------------|-------------|---|
| Start a Round | Chart 1 | |
| Round Draft | Chart 2 | - |
| Task Assignments | Chart 3 | |
| Completed Rounds | Chart 4 | - |
| Completed Forms | Chart 5 | |
| Alert Notifications | + Exception | - |
| Task Management | | |
| Task History | | |
| | Apply | |

- Select the check box for each panel that will be displayed on your dashboard.
- Click Apply. Your dashboard page will refresh with the changes.

Note: To close a panel, click at the top of the appropriate panel.

- Move your widget panels by left-click and hold on the panel top bar and dragging it to the appropriate place on your dashboard.
- The widget panels will jump to predefined grid locations to keep spacing consistent.





- Customize your dashboard by selecting the widgets you wish to display. The user's role will determine which widget panels the user has access to using.
- Widgets may be resized by dragging the lower right hand corner of the widget panel.

Note: Widget update sync is every 10 minutes by default. This can be modified in the Admin tab to sync as frequently as every 2 minutes or up to 30 minutes. The Widget must sync to pull in new data when changes are made. A manual sync icon is available for each Widget.

Widget Definitions:

- 1. **Start a Round:** [Admin, Editor, Operator, Reporter] Allows the user to begin a round and complete the elements (assets/forms) with the round based on the variant chosen. Note that Rounds with any Element that has the Scan Required selected will not be able to run from the desktop web browser. Rounds with a Scan Required element can only be ran from the GoPlant Mobile Application on a device that supports scanning or NFC/RFID capability.
- 2. **Round Drafts:** [Admin, Editor, Operator, Reporter] Allows the user to launch a saved round draft so that they can continue to fill out the remaining assets/forms left in the round to complete. Users also have the ability to delete round drafts within this widget. Drafts with a scan required element will not be available in the Draft widget.
- 3. **Task Assignments:** [Admin, Editor, Operator, Reporter] Gives a preview of any tasks currently assigned to the user. Selecting an item will launch that Round Variant unless the Round contains a scan required element.
- 4. **Completed Rounds:** *[Admin, Editor, Operator, Reporter]* Allows the user to search and select completed rounds, as well as drill down into the elements within the round to see the completed forms associated. Users can add notes to completed forms to show edits and round review. Admin users also have the ability to edit responses within the forms, as well as delete the completed form altogether. When a round review is required, the review status will display as such and will update once the review(s) are completed.
- 5. **Completed Forms:** [Admin, Editor, Operator, Reporter] Allows the user to search and select completed Forms. Users can add notes to completed forms to show edits and form review. Admin users also have the ability to edit responses within the forms, as well as delete the completed form altogether.
- 6. **Alert Notifications:** [Admin, Editor, Operator, Reporter] Allows the user to view and acknowledge alerts. Alerts are generated when email triggers are added to Form steps.
- 7. **Task Management:** [Admin, Editor] The Task Management widget provides a view of tasks accessible by the user. The tasks displayed on the dashboard widget represents task events generated for the current day. The user has the ability to browse and manage additional future task events.
- 8. **Task History:** [Admin, Editor] The Task History widget provides a view of task events accessible by the user. The tasks displayed are grouped by the task type and display the percentage of tasks completed for the past 14 days.
- Charts (1 5): [Admin, Editor, Operator, Reporter] Allows the user to view, open and launch charts. Charts must be created and published under the 'Reports' tab before they are available for adding to the Dashboard widget.





Online Client Manager Interface Tabs [Admin, Editor]

The GoPlant navigation bar is always visible at the top of the page. On the navigation bar, you will see one or more icons. These icons are representative of the user role(s) that have been assigned to you. If you have been given Admin or Editor privileges, you will see the Manager icon to the right of the Dashboard icon.



• Access your company's hierarchical structure by selecting the **Manager** icon in the GoPlant Navigation Bar. The GoPlant Manager Interface Tabs appear.



Note: Admin users will have access to all Manager Interface tabs and can manage users and the company hierarchy.

| >> | Helios Solar | | | | | |
|----|--------------|------------|--------|--------|-------|---------------|
| | Forms | Form Tools | Assets | Rounds | Tasks | External Tags |

Note: Editor users will have access to Manager Interface tabs, but do not have the ability to manage users, user groups, and the storage group properties tabs.

| 🔊 Helios Solar | | | | | | | | |
|----------------|------------|--------|--------|-------|---------------|-------|-------------|-------------------------|
| Forms | Form Tools | Assets | Rounds | Tasks | External Tags | Users | User Groups | Helios Solar Properties |

1. Expand the left panel to display the storage group navigation panel.

| - Helios Solar | « | Helios Solar | | | | | | | | |
|----------------|---|--------------|------------|--------|--------|-------|---------------|---------------------------------------|-------------|-------------------------|
| Plant 1 | | Forms | Form Tools | Assets | Rounds | Tasks | External Tags | Users | User Groups | Helios Solar Properties |
| | | | | | | | | · · · · · · · · · · · · · · · · · · · | | |
| Plant 2 | | | | | | | | | | |

2. Navigate to the appropriate storage group by clicking on the storage group name.



3. Select the appropriate Manager Interface tab of the item you plan to create, edit, add, and/or delete.

Manager Interface Tabs

| » Helios Solar | | | | | | | | |
|----------------|------------|--------|--------|-------|---------------|-------|-------------|-------------------------|
| Forms | Form Tools | Assets | Rounds | Tasks | External Tags | Users | User Groups | Helios Solar Properties |

Navigation in GoPlant is done by picking a Storage Group from the navigation panel, then selecting the appropriate tab from the list to see the details for that Storage Group. Always choose your starting





point of a Storage Group first, then the function / item you want to edit or manage from the Tab list.

Storage Groups organize your information within GoPlant. It also determines your security organization.

Users can only see items within their Storage Group and below (child groups of the parent).

The Tabs change your viewpoint within GoPlant. Starting from far Right to Left:

- 1. **Storage Group Properties:** *[Admin]* The Storage Group properties tab will be representated by the selected Storage Group name and the word 'Properties'. This tab allows GoPlant admins to mirror their organization's plant structure or logical equipment areas when setting up the GoPlant system. A nested hierarchy helps to control the privilege levels, organizes Assets and Rounds, and creates order within large pools of people using the system.
- 2. **User Groups:** *[Admin]* Allows GoPlant admins to structure their users into organized groups. Groups are important for Task assignments and Email distribution lists.
- 3. **Users:** *[Admin]* The Users tab is used to create and place users within the group hierarchy structure created by the admin user. A user's access only applies to data and forms at their level within the organization and below.
- 4. **External Tags:** [Admin, Editor] Used to create, edit, and assign external tags to Form Step questions and Assets for external software systems. In addition to data export, External Tags can be used for reporting purposes and displaying asset related information on common forms.
- 5. **Tasks:** [Admin, Editor] The Tasks tab is used to display all tasks within the storage group. A Task is a collection of one or more Round Variants that has a defined set of assignees and an end time. Tasks define the data collection to be done (Round Variants), the users or user groups assigned, and a single or recurring schedule.
- 6. **Rounds:** *[Admin, Editor]* The Rounds tab is used to display and manage all rounds within the Storage Group. Rounds can include both form and asset elements, as well as have up to four variants. Rounds are the basis for data collection and Tasks on the mobile application.
- 7. **Assets:** *[Admin, Editor]* Used to create, edit and display all assets within the group hierarchy structure and their status. Forms are assigned to Assets so that one data collection template may be used across hundreds of Assets. Assets allow for scanning while performing Rounds to quickly display the proper data collection form to the operator for a specific Asset.
- 8. **Form Tools:** *[Admin, Editor]* The Form Tools tab contains functions that can be used to simplify form creation. These functions include Document display, Visibility Defaults and two column Lookup Tables. This area is used to upload/link training or company documentation to be used for reference inside a form.
- 9. **Forms:** [Admin, Editor] The Forms tab is used to create, edit, and publish forms used for data collection. Forms are the primary component of Rounds and define individual data entry pages to collect specific asset or area type information within your company.





GoPlant – Creating and Modifying GoPlant Data

Storage Groups – the hierarchical structure [Admin]

 Access your company's hierarchical structure by selecting the Manager icon in the GoPlant Navigation Bar. The GoPlant Manager Interface Tabs appear. Expand the navigation panel to select a Storage Group. Storage Groups are the hierarchical structure of your Plant, Location, or other groupings determined during implementation of GoPlant.

| - Helios Solar | « | Helios Solar | | | | | | | | |
|----------------|----------|--------------|------------|--------|--------|-------|---------------|-------|-------------|-------------------------|
| Plant 1 | | Forms | Form Tools | Assets | Rounds | Tasks | External Tags | Users | User Groups | Helios Solar Properties |
| Plant 2 | | | | | | | | | | |

• Use the left navigation panel to view the hierarchical structure of your company's organization. As you build your structure, use this panel to select the appropriate sub-group where you plan to create, edit, add, and/or delete GoPlant items.



• Select the **Properties Tab.** The Storage Group Properties page appears.

| Name | QA Helios Solar Plant | Sub-Groups | + |
|--------------|--|------------|---|
| Description | Description | East Side | Î |
| | | North Side | |
| | | West Side | î |
| Time Zone | (UTC-06:00) Central Time (US & Canada) - DST 🔹 | | |
| Max Sessions | 190 <u>1 Active Sessions</u> | | |

• Create a new storage group (sub-group) by selecting the 🛨 icon.

The Add New Storage Group window opens.

| Name | QA Helios Solar Plant |
|-------------|--|
| Description | Description |
| Time Zone | i. |
| Time zone | (UTC-06:00) Central Time (US & Canada) - DST 🔻 |

• Type the name of the group in **Name**.





- Type in Description.
- Select the appropriate **Timezone**.
- Click **Save** to continue, or **Cancel** to exit without saving your changes.

| Name | QA Helios Solar Plant | | Sub-Groups | + |
|--------------|--|------|------------|---|
| Description | Description | | East Side | Î |
| | | • | North Side | 1 |
| | , ا <u>ن</u> | | West Side | Î |
| Time Zone | (UTC-06:00) Central Time (US & Canada) - DST 🔻 | | | |
| Max Sessions | 190 <u>1 Active Sessions</u> | | | |
| | | Save | | |

• Optional: To modify a storage group (name, description, and/or time zone), select the storage group name from the navigation panel. Type the new group name and/or description in **Name** and/or **Description**.

| Time Zone | (UTC-06:00) Central Time (US & Canada) - DST 🔻 | |
|--------------|---|---|
| Max Sessions | (UTC+08:00) lrkutsk - DST | ^ |
| max sessions | (UTC+09:00) Osaka, Sapporo, Tokyo | |
| × | (UTC+09:00) Seoul | |
| | (UTC+08:00) Beijing, Chongqing, Hong Kong, Urumqi | |
| / | (UTC+07:00) Krasnoyarsk - DST | |
| | (UTC+08:00) Kuala Lumpur, Singapore | |
| | (UTC+08:00) Perth - DST | |
| | | Y |

• Using the **Timezone** dropdown list, select the new appropriate timezone. Select **Save** to save your changes.

| Name | QA Helios Solar Plant | Sub-Groups | + |
|--------------|--|------------|----------|
| Description | Description | East Side | T |
| | | North Side | |
| | ja. | West Side | |
| Time Zone | (UTC-06:00) Central Time (US & Canada) - DST 🔻 | | |
| Max Sessions | 190 <u>1 Active Sessions</u> | | |
| | Save | | |

• Optional: To delete a storage group (name, description, and/or time zone), select the trash can icon next to the appropriate group to delete.

Note: A storage group must be empty (all sub-groups, users, user groups, forms, assets, rounds, and tasks must be removed) before it can safely be deleted.

Ŀ.





Version Tracking Allows GoPlant admins to add additional information when saving or Publishing items within the Storage Group. GoPlant tracks all changes made in Forms, Rounds and Tasks by each user. The Version Tracking options enables additional information and notes to be saved for the changes for reporting purposes within each item.

- **Enabled:** Allows The Users to add an optional Id and Log for each change in Forms, Rounds and Tasks (Optional).
- Enabled and Required: Allows The Users to add an optional Id and required Log entry for each change in Forms, Rounds and Tasks. User cannot save/publish the item without entering a Log entry.
- Apply to Children: Apply Storage Group Version Tracking rules to children. Enabling this option allows for child Storage Groups to inherit the Version tracking settings for Forms, Rounds, or Tasks.
- Inherited: Inherits the Version Tracking rules of the parent Storage Group.

| Version Tracking | | | | | | | | |
|------------------|---------|----------|-------------------|-----------|--|--|--|--|
| Name | Enabled | Required | Apply to Children | Inherited | | | | |
| Forms | | | \checkmark | | | | | |
| Rounds | | | | | | | | |
| Tasks | | | | | | | | |

By default, for the root Storage Group, the options (Enabled, Required and Apply to Children) will be disabled.





To enable these options in Forms, Rounds and Task check enable and click on save button.

| | Sub-Groups | | | | + |
|------|-----------------|---------|----------|-------------------|-----------|
| | East Side | | | | â |
| | North Side | | | | 1 |
| | West Side | | | | |
| Save | Version Trackir | - × | | | |
| | Name | Enabled | Required | Apply to Children | Inherited |
| | Forms | | | | |
| | Rounds | | | | |
| | Tasks | | | | |

• Enabling Version Tracking adds the Log Entry and optional ID field to the Form Designer, Round Designer and Task Designer before each change.

| | Sub-Groups | | | | | + |
|------|------------------|---------|---|-------------------|-----------|---|
| | East Side | | | | Ē | |
| | North Side | | | | <u> </u> | |
| | West Side | | | | Ē | |
| | | | | | | |
| | | | | | | |
| Save | | | | | | |
| | Version Tracking | g / | / | | | |
| | Name | Enabled | Required | Apply to Children | Inherited | |
| | Forms | | | | | |
| | Rounds | | Image: A start of the start of | | | |
| | Tasks | 2 | 2 | | | |

• Checking "Required" will enforce a Log entry to be entered before publishing the Form, Round, or Task.





 Once selections have been made, it is important to click the blue "Save" button to save your changes.

| | Sub-Groups | | | | + |
|------|------------------|----------|----------|-------------------|-----------|
| | East Side | | | | Ē |
| | North Side | | | | Ĩ |
| | West Side | | | | <u> </u> |
| Save | Version Tracking | g / | / | / | |
| | Name | Enabled | Required | Apply to Children | Inherited |
| | Forms | | 2 | ۲ | |
| | Rounds | * | 2 | | |
| | Tasks | | | | |

The "Apply to Children" will push your settings to all children Storage Groups. Version
Tracking settings can be changed at any Storage Group level. If you wish to reset the
Version tracking rules simply select the "Inherited" checkbox and "Save" the information.
This will clear out any storage group level rules and revert to the inherited permissions from
the Parent Storage Group.

Editor Security Permissions (Storage Group Level) [Admin]

- Editor security in GoPlant allows for granular control of the areas within GoPlant that users can make changes. User specific settings override any Storage Group level permissions, but Storage Group settings create default values for these settings.
- Each Editor Security Permission applies to those users who have the "Editor" security role.
- If a user is an Editor, GoPlant will use the default Editor Security Permission for the user's Storage Group unless that permission is overridden within the user's profile.
- Each row contains a specific permission along with "Enabled", "Hide", "Apply to Children", and "Inherited" options.
- Option definition "**Enabled**" allows this specific permission to be active within this storage group. Each User who has the Editor security Role will use this permission level unless within their profile they have been given different rights.
- Option definition "**Hide**" removes this icon, Tab, or selection mechanism for this permission from the end users. Hiding an item removes it from view for all users unless it is specifically overridden at the User Profile level.
- Option definition "Apply to Children" allows for this setting to cascade to children Storage Groups.





• Option definition – "Inherited" allows for resetting the permission level and allowing this Storage Group to inherit its permission level from the Parent Storage Group. When the 'Save' button is pressed, the settings will reset and show what was inherited from the Parent Storage group. Changing this value does not reset individual User Profile settings. Any user specific changes must be cleared or reset separately.

| General Settings | | | | | Sub-Grou | ¢5 | | | |
|--|-----------------------------------|--------------------|-------------|-----------|-------------------|--------------------|----------|-------------------|-----------|
| Name | telios Solar Power | | | | Mijave | | | | 0 |
| Description | | | | | Sonora | | | | 8 |
| Time Zone | (UTC-06:00) Central Time (| US & Canada) - DS7 | | | | | | | |
| | Max Sessions 25 1.Active Sensions | | | | | | | | |
| Max Sessions | 5 14 | ictive Sessions | | | | | | | |
| | _ | active Sessions | | 8 | Version 1 | hacking | | | |
| Editor Security Permissio | _ | | to Orikleen | (Merited | Version T Name | facking Enabled | Required | Apply to Children | intented |
| Editor Security Permissio | orm Enabled | | to Children | _ | | | Required | Apply to Children | Interited |
| Editor Security Permissio Lance How Duplicate External Tag D | orm Ended | Hide Apply | to Children | Inherited | Name | Enabled | | | |
| Editor Security Permissio | ons Enabled | Hide Apply | to Children | inherited | Name Forms | Evaluation | | • | |

Editor Security Permissions available:

- **Delete Completed Forms:** Enables a user to delete an entire completed Form via the Completed Forms Browse widget.
- Edit Assets: Enables a user to create and modify Assets. This also includes moving and copying Assets.
- Edit Completed Forms: Enables a user to edit answers on a Completed Form from either the Completed Form Browse widget or the Completed Round Browse widget. This enables the user to modify answers to step questions on a Form. GoPlant keeps all historical data of the original or changes entries.
- Edit External Tags: Enables a user to create and modify External Tags for Asset Forms and Forms. External Tags may also be deleted or moved.
- Edit Form Tools: Enables a user to create, modify, and delete Form Tool items Documents and two column Lookup tables.
- Edit Forms: Enables a user to create, modify, or delete Forms.
- Edit Reports: Enables a user to create, modify, or delete Reports as well as Charts.
- Edit Rounds: Enables a user to create, modify, or delete Rounds. This includes making working copies and deleting working copies.
- Edit Tasks: Enables a user to create, modify, or delete Tasks.
- Edit User Groups: Enables a user to create, modify, or delete User Groups. Please note that the user must also have the 'Admin' role in order to have access to the "User Groups" tab in the Manager area of GoPlant.
- Edit Users: Enables a user to create, modify, or delete Users. Please note that the user must also have the 'Admin' role in order to have access to the "Users" tab in the Manager area of GoPlant.
- Edit Visibility Defaults: Enables a user to create, modify, or delete Visibility Default Rules.
- **Revoke Tasks:** Enables a user from the Task Management Widget to revoke future Task events.





| Editor Security Permis | sions | | | |
|--------------------------|---------|------|-------------------|-----------|
| Name | Enabled | Hide | Apply to Children | Inherited |
| Delete Completed Forms | | | | |
| Edit Assets | | | | |
| Edit Completed Forms | | | | |
| Edit External Tags | | | | |
| Edit Form Tools | | | | |
| Edit Forms | | | | |
| Edit Reports | | | | |
| Edit Rounds | | | | |
| Edit Tasks | | | | |
| Edit User Groups | | | | |
| Edit Users | | | | |
| Edit Visibility Defaults | | | | |
| Revoke Tasks | | | | |
| | | | | |





User Settings

GoPlant provides settings at the storage group level or individual user level to choose "Auto-Reconnect" and "Auto Sync" for the GoPlant Mobile application (GoPlant app). Whenever the GoPlant app is on its "home screen", AND a network connection is present at the device level, AND the "Auto-Connect" / "Auto Sync" feature is enabled, the GoPlant app will regularly attempt to connect to its configured GoPlant Server. If the connection attempt is successful, the GoPlant app will initiate a sync to upload/download any data or changes to the mobile device. In addition to the Home screen, the main Tasks, Rounds, Drafts, and Asset screens will also allow for an auto-reconnect of the GoPlant app to the server.

| User Settings | | | | |
|------------------------------|---------|----------------------|-------------------|-----------|
| Name | Enabled | Allow User to Change | Apply to Children | Inherited |
| Allow Logout in Offline Mode | | | | |
| Enable Auto Sync | | | | |
| Enable Device Auto-Reconnect | | | | |
| Enable Sync Notifications | | | | |
| | | | | |

Settings

- Allow Logout in Offline Mode: Allow the User to logout with the device in Offline Mode. If this option is disabled, the user is forced to be online to log out.
- Enable Auto Sync: Allows the device to automatically synchronize Forms, Assets, Rounds, Tasks and Answer History. The GoPlant app attempts to sync on the Home page and most main Tab screens (Round, Task, Draft, and Asset). GoPlant will not attempt to sync while items are being edited or within a Round or Task.
- Enable Device Auto-Reconnect: The GoPlant app will attempt to connect regularly to your configured GoPlant Server. If the connection attempt is successful, the GoPlant application will initiate a synchronization to upload / download any data or change to the mobile device.
- Enable Sync Notifications: The device will indicate when there are items that require an update such as Rounds, Tasks, Drafts or Assets. A ribbon notification will appear indicating the group of items that need to be synced. The GoPlant app home screen will also change the text color to yellow for those items that are not synced with the server.

Adding Users [Admin]

Prior to creating your users and user groups in GoPlant, it is important to first identify the level in the hierarchy you wish them to reside, as well as the user role(s) they will have and whether or not they will have the ability to perform supervisory round reviews.





User Roles

- Admin: An Administrator can create, edit, and delete storage groups, user groups, and users at their hierarchy level and below. Admins also have special privileges like being able to release user sessions, resetting user passwords and managing max concurrent user sessions within a storage group. This is the most advanced user role in the system and inherits the abilities of the other roles within GoPlant. *NOTE: A "Super Admin" is an admin defined at the root level storage group and has access to the Admin global settings.*
- Editor: An Editor can create, edit, and delete forms, assets, rounds, tasks, and reports at their hierarchy level and below. An Editor does not have the ability to manage Users, User Groups or Storage Groups. Only give this access to Project Leads who have sufficient training in GoPlant.
- **Operator:** An Operator can launch rounds, drafts, and task assignments, as well as view alert notifications at their hierarchy level and below.
- **Reporter:** A Reporter can view completed rounds/forms, reports, and charts at their hierarchy level and below. Reporters have access to the website dashboard only and are not capable of collecting data on the mobile client app.
- **Round Review:** GoPlant provides the ability to enable either a single or dual review on completed rounds. A user identified as a "reviewer" must have the round review option enabled in the user's profile.
- Use the left navigation panel to view the hierarchical structure of your company's organization. As you add your users, use this panel to select a sub-group which will allow you to add users within it.

| - Helios Solar | « | Helios Solar | / Plant 2 | | | | | | | |
|----------------|----------|--------------|------------|--------|--------|-------|---------------|-------|-------------|--------------------|
| Plant 1 | | Forms | Form Tools | Assets | Rounds | Tasks | External Tags | Users | User Groups | Plant 2 Properties |
| Plant 2 | _ | | | | | | | | | |





Select the **Users** Tab. The **Users** page appears.

| New | v User | | | Q Sear | rch |
|-----|-----------------|-----------------|---|---------------|-----|
| | Name | Login | Roles | | |
| | Q Search | Q Search | Q Search | | |
| Ø | Admin Solar | adminsolar | Admin,Editor,Reporter,Operator,Reviewer | | |
| Ø | Operator Solar1 | Operator_solar1 | Reporter,Operator,Reviewer | ረባ | Ê |
| Ø | Operator Solar2 | Operator_solar2 | Reporter,Operator,Reviewer | ረህ | Î |
| Ø | Operator Solar3 | Operator_solar3 | Reporter,Operator,Reviewer | ሮህ | Î |
| | | 4 Elements | | | |

- On the **Users** page, select New user. The **New User** window opens.

| Username:* | Username | | Set Password |
|-------------------|--------------------------------|--------------------|--------------|
| First Name:* | John | Last Name:* | Doe |
| EMail: | you@domain.com | Mobile URL Change: | Enabled |
| Security Role:* | Admin Editor Operator Reporter | Round Review: | Enabled |
| Associated Groups | | + 🏛 | |
| | | | |
| | | | |
| | | | |
| | | | |

- Type in or add the appropriate user information. A Red Asterisk marks required fields.
 - a. Username (Required): This field is used to type in the login name the user will have. Use any combination of letters and whole numbers.
 - b. Set Password: A temporary password can be set by the Admin user. To set a temporary password, use a combination of letters and whole numbers, and confirm the password selected.

Note: If a temporary password is not set, the user will use their username as the password.

- c. First Name (Required): This field is used to type in a user's first name.
- d. Last Name (Required): This field is used to type in a user's first name.
- e. Email: This field is used to type in a user's primary email address. Note: This is the address that will be used in trigger alerts and task assignment reminders.





- f. **Mobile URL Change:** Selecting this option will give the user the ability to reconfigure the mobile application so that it can switch between different GoPlant sites. Note: this is only used for any user that may have more than one GoPlant site
- g. Security Role (Required): Select the appropriate box beside each role you wish to grant the user. Selecting Admin will automatically check all other options that are included.
- h. **Round Review:** Select the option to enable round review to allow the user the ability to perform supervisory reviews on completed rounds.
- Associated Groups: An admin user can associate users to managed user groups. In the

Associated Groups panel, select **t** to open the **Add** User Groups window.

Name Login Roles Q, Q, Q. Admin Solar adminsolar Admin,Editor,Reporter,Operator,Reviewer C Operator solar1 Ô C Operator Solar1 Reporter, Operator, Reviewer Ê C Operator Solar2 Operator_solar2 Reporter, Operator, Reviewer ሮ **ආ** 🏛 C Operator Solar3 Operator_solar3 Reporter, Operator, Reviewer 4 Elements

 Optional: To edit a user, on the Users page, select the name of the user you wish to edit or the edit icon next to the name.

The Edit User window will open:

| Jsername:* | Operator_solar1 | | | Set Password | |
|-------------------|------------------|---------------------|--------------------|--------------|--|
| irst Name:* | Operator | | Last Name:* | Solar1 | |
| Mail: | you@domain.com | | Mobile URL Change: | Enabled | |
| ecurity Role:* | Admin 🗌 Editor 🛛 | 🗹 Operator 🛛 Report | er Round Review: | Enabled | |
| Associated Groups | | | + 🏛 | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

• Type in or edit the appropriate user information.



• Optional: To delete a user, on the **Users** page, select the **delete** icon next to the user you wish to delete.





- Editor Security Permissions (Users) [Admin]

- Editor security in GoPlant allows for granular control of the areas within GoPlant that users are allowed to make changes. User Editing settings always overrides any Storage Group level permissions. Global changes to Editing security may be made at the individual Storage Group level. However, modifying an individual User's Editing permissions will override the settings.
- Each item within Editor security only applies to users who have the "Editor" security role.
- Each row contains a specific permission along with "Enabled", "Hide", "Apply to Children", and "Inherited" options.
- Option definition "**Enabled**" allows this specific permission to be active within this storage group. Each User who has the Editor security Role will use this permission level unless within their profile they have been given different rights.
- Option definition "**Hide**" removes this icon, Tab, or selection mechanism for this permission from the end users. Hiding an item removes it from view for all users unless it is specifically overridden at the User Profile level.
- Option definition "Apply to Children" allows for this setting to cascade to children Storage Groups.
- Option definition "Inherited" allows for resetting the permission level and allowing this Storage Group to inherit it's permission level from the Parent Storage Group. When the 'Save' button is pressed, the settings will reset and show what was inherited from the Parent Storage group.

| w User Editor Editor | | | | | | | B |
|-----------------------------|---------------|--------------------------|-----------|--------------------------|--|------|--------------|
| Username:* | Editor | | | | Set Password | | |
| First Name:* | Editor | | | Last Name:* | Editor | | |
| EMail: | you@domain.co | om/ | | Mobile URL Change: | Enabled | | |
| Security Role:* | Admin 🗹 Ed | itor 🗹 Operator 🕑 Report | er | Round Review: | Enabled | | |
| Associated Groups | | | + 💼 | Editor Security Permis | ssions | | |
| | | | | Name | Enabled | Hide | Inherited |
| | | | | Delete Completed Forms | • | | A |
| | | | | Edit Assets | I. | | 1 |
| | | | | Edit Completed Forms | | | A |
| | | | | Edit External Tags | I | | <pre>d</pre> |
| | | | | Edit Form Tools | | | A |
| 1 0W | | | | Edit Forms | Image: A start of the start | | A |
| Jser Settings | | | | Edit Reports | • | | |
| ame | Enabled | Allow User to Change | Inherited | Edit Rounds | v | | <pre>d</pre> |
| low Logout in Offline Mode | | | | Edit Tasks | • | | |
| nable Auto Sync | | | | Edit Visibility Defaults | v | | A |
| hable Device Auto-Reconnect | | | | Revoke Tasks | • | | |
| nable Sync Notifications | A | | 1 | | | | |





Editor Security Permissions available:

- **Delete Completed Forms:** Enables a user to delete an entire completed Form via the Completed Forms Browse widget.
- Edit Assets: Enables a user to create and modify Assets. This also includes moving and copying Assets.
- Edit Completed Forms: Enables a user to edit answers on a Completed Form from either the Completed Form Browse widget or the Completed Round Browse widget. This enables the user to modify answers to step questions on a Form. GoPlant keeps all historical data of the original or changes entries.
- Edit External Tags: Enables a user to create and modify External Tags for Asset Forms and Forms. External Tags may also be deleted or moved.
- Edit Form Tools: Enables a user to create, modify, and delete Form Tool items Documents and two column Lookup tables.
- Edit Forms: Enables a user to create, modify, or delete Forms.
- Edit Reports: Enables a user to create, modify, or delete Reports as well as Charts.
- Edit Rounds: Enables a user to create, modify, or delete Rounds. This includes making working copies and deleting working copies.
- Edit Tasks: Enables a user to create, modify, or delete Tasks.
- Edit User Groups: Enables a user to create, modify, or delete User Groups. Please note that the user must also have the 'Admin' role in order to have access to the "User Groups" tab in the Manager area of GoPlant.
- Edit Users: Enables a user to create, modify, or delete Users. Please note that the user must also have the 'Admin' role in order to have access to the "Users" tab in the Manager area of GoPlant.
- Edit Visibility Defaults: Enables a user to create, modify, or delete Visibility Defaults Rules.
- **Revoke Tasks:** Enables a user from the Task Management Widget to revoke future Task events.

| Editor Security Permissi | ons | | | |
|--------------------------|---------|------|-------------------|-----------|
| Name | Enabled | Hide | Apply to Children | Inherited |
| Delete Completed Forms | | | | |
| Edit Assets | | | | |
| Edit Completed Forms | | | | |
| Edit External Tags | | | | |
| Edit Form Tools | | | | |
| Edit Forms | | | | |
| Edit Reports | | | | |
| Edit Rounds | | | | |
| Edit Tasks | | | | |
| Edit User Groups | | | | |
| Edit Users | | | | |
| Edit Visibility Defaults | | | | |
| Revoke Tasks | | | | |
| | | | | |





Adding User Groups and Associating Users [Admin]

User Groups within GoPlant are used for easily assigning tasks and choosing email recipients within step triggers. It is important to assign tasks with a user group instead of individual user accounts in order to ease the maintenance burden in the future as people are added, change roles, or leave the Company. By creating and using User groups for tasks and emails it eliminates tracking down and changing individual Forms and Tasks throughout the GoPlant system when personnel changes arise.

• Use the left navigation panel to view the hierarchical structure of your company's organization. As you add your user groups, use this panel to select a sub-group which will allow you to add user groups within it.



• Select the User Groups Tab. The User Groups page appears.

| New User Group | | Q Search |
|----------------|------------|----------|
| Name | | |
| Q Search | | |
| C Operators | | |
| $\overline{\}$ | 1 Elements | |





On the User Groups page, select
 New user group

. The New User Group page appears.

| New User Group New User Group 1549051758631 | | | × |
|---|---|------------|---|
| User Group Information | | | |
| Name Description | New User Group 1549051758631 Enter User Group Description | | |
| Associated Users | | + í | |
| Name | Group | | |
| | | | |

- Type the name of the user group in **Name**.
- Type the description of the user group in **Description**.
- In the Associated Users panel, select 💼 to open the Add associated users window.

| 2, | Add Users | \$ |
|----|--------------------------|----|
| | Select Recipients | |
| | Filter: | |
| | ▲ Search × | |
| | ✓ Helios Solar | |
| | ✓ Helios Solar / Plant 1 | |
| | Cone Reporter | |
| | | |
| | | |

- Select the checkbox next to the user(s) in the list that you wish to add to the user group.
- Select Apply to continue, or to close the window without saving.
- Select 🖹 to save your changes, or 🔀 to close without saving.



Optional: To edit a user group, on the User Groups page, select the user group name in the list or next to the user group name.

The Edit User Group page appears.

| | B | × |
|--|------------------------------|---|
| | | |
| Managers Enter User Group Description | | |
| | + | Ê |
| Group | | |
| | | |
| | | |
| | | |
| | Enter User Group Description | Managers Enter User Group Description .ti |

Edit the appropriate user group information by typing in the Name and Description fields or selecting to add associated users or to delete associated users in the Associated Users panel.

| Nev | v User Group | | | | | | Q Sear | rch |
|-----|------------------|--|--------|-------|--|---|--------|----------|
| | Name | | | | | | | |
| | Q Search | | | | | | | Sear |
| ø | Managers | | | | | | 1 | * |
| Ø | <u>Operators</u> | | | | | / | | î |
| | | | 2 Eler | ments | | | | |

• Optional: To delete a user group, on the **User Groups** page, select in on the row of the user group you wish to delete.





Creating Assets [Admin, Editor]

 Use the left navigation panel to view the hierarchical structure of your company's organization. As you add your assets, use this panel to select a sub-group which will allow you to add assets within it.

| - Helios Solar | « | Helios Solar | / Plant 2 | | | | | | | |
|----------------|---|--------------|------------|--------|--------|-------|---------------|-------|-------------|--------------------|
| Plant 1 | | Forms | Form Tools | Assets | Rounds | Tasks | External Tags | Users | User Groups | Plant 2 Properties |
| Plant 2 | | | | | | | | | | |

• Select the Assets Tab. The Assets window appears.

| | Tag | Forms | Rounds | Tasks | State | Class | Туре | Area | Location | | |
|----------|-------------------------|----------|----------|-------|-----------------|------------|-----------------------|------------|------------|----|---|
| 6 | Air Cooling Condenser 1 | <u>2</u> | <u>5</u> | 1 | In-Service | Production | Air Cool Condenser | West Plant | West | ළු | Û |
| 6 | Boiler Feed Pump - 1A | 2 | 1 | 4 | Under Repair | Production | Pump | Area 17 | Building 1 | ආ | Û |
| B | Compressor 101-A | 1 | 2 | 1 | In-Service | Production | Air Cool Condenser | Main Plant | North Side | ත | Û |
| I 🔒 | Cooling Tower ST1 | 1 | 1 | 4 | In-Service | | | | | С | Û |
| 6 | Eye Wash Station 572 | 1 | <u>8</u> | Z | In-Service | Safety | Eye Wash Station | West Plant | West | ආ | Û |
| 🖉 🖨 🔋 | Factory asset | 1 | 1 | 0 | In-Service | | | | | മ | Û |
| I 🔒 | Fire Extinguisher 1001 | 2 | 4 | 2 | In-Service | | | | | മ | Û |

Create a new asset by selecting New Asset. The Edit Asset page appears.

| Asset Information | | QR | Picture | 🕑 🖻 |
|-------------------|-------------------------------------|------------------|--|-------------|
| Asset Tag * | New Tag 1710874174550 | - II.2221 | | |
| Asset Name | Enter Asset Name | | | |
| Description | | | | |
| Asset Type | Select Asset Type | | | |
| Application | Select Application | | Formats: .gif, .jpeg, or .png. Maximum | Size : 1 MB |
| Manufacturer | Manufacturer Name | Associated Forms | |)+ ሰ |
| Model Number | Model Number | | | |
| Serial Number | Serial Number | | | |
| Barcode Value | Enter Barcode Value | | | |
| NFC Value | Enter NFC Value | | | |
| RFID | Enter RFID | | | |
| Current State | Normal | | | |
| | Configure Vibration and Temperature | | | |
| Attributes | | | | |
| Class | Select value 👻 | | | |
| Туре | Select value 👻 | | | |
| Area | Select value | | | |
| Location | Select value | | | |

- Enter a unique Asset Name in Asset Tag (Required).
- Enter the barcode of the Asset in **Barcode Value (Recommended).** Barcodes are case sensitive and do not accept special double-byte characters.

Note: Barcode Value is a unique value associated with the Asset and defines the QR code image. If you change the Barcode Value, the QR code image will change as well. If you have printed or created tags for your equipment, changing this value will REQUIRE you to update the physical tags existing in your organization.





• Enter the NFC code of the Asset in **NFC Value.** This field is optional. The NFC value can be the unique address of the NFC tag or defined as the information written to the NFC tag. If you use the Serial # of the tag you must use all lowercase letters.

Note: the NFC Value is a unique value associated with the Asset and defines the NFC Tag of the asset.

• Enter the *RFID* code of the Asset in **RFID Value.** This field is optional. The RFID value can be the unique address of the RFID tag or defined as the information written to the RFID tag.

Note: the RFID Value is a unique value associated with the Asset and defines the RFID Tag of the asset.

- Enter the description in the **Description** field.
- Choose the Asset State in the Current State field.
- Note: The default states can be changed by the Admin user in the System Admin tool.
- Select the attribute from the drop down(s) for the attribute types and values defined in System Admin.

Note: The default attribute types (Class, Type, Area, and Location) and values are managed by the Admin user in the System Admin tool.

- Attach an optional JPG picture by clicking on and selecting the image file via browse. Please note that addition of large numbers of images affects the Sync speed of the mobile device. Images also affect the storage available on iOS devices and may cause issues with completing Rounds in the field.
- Add an **Associated form** by clicking on and selecting a published form. This makes the Asset available to have its state changed in a Form Step as a triggered response, as well as allows GoPlant to automatically maintain any asset information when the operator collects data on an asset within a round.

Note: An associated form can only be added if the form has been published.

• Click 🖹 to save the asset or click **X** to cancel creating the asset.

Asset Import [Admin, Editor]

GoPlant Assets can also be created or modified using GoPlant Asset Import. This functionality allows an editor to define assets in a CSV file. When the file is imported, GoPlant checks the Asset Tag specified. If the Asset Tag matches an existing Asset, that Asset is updated based on the data specified in the CSV file. Otherwise, GoPlant creates a new Asset which corresponds to the CSV data.

To create or update Assets in GoPlant using the Asset Import tool, follow these steps:

• Use the left navigation panel to view the hierarchical structure of your company's organization and select the Storage Group where you want to create new or modify existing Assets.



• Select the Asset Tab to navigate to the Asset page.

+- Building 1

| Forms | Form Tools Assets | Rounds | Tasks | Externa | l Tags | User | s User | Groups | Mojave Properti | es | | | |
|-----------|-------------------------|--------|-------|----------|----------|----------|-----------------|------------|-----------------------|------------|------------|---------------|-----|
| New Asset | Import Assets | | | | | | | | | | | Q Sear | rch |
| | Тад | | | Forms | Rounds | Tasks | State | Class | Туре | Area | Location | | |
| 6 | Air Cooling Condenser 1 | | | <u>2</u> | <u>5</u> | <u>1</u> | In-Service | Production | Air Cool Condenser | West Plant | West | ළ | Ú |
| 6 | Boiler Feed Pump - 1A | | | <u>2</u> | 1 | <u>4</u> | Under Repair | Production | Pump | Area 17 | Building 1 | | ť |
| 6 | Compressor 101-A | | | 1 | 2 | 1 | In-Service | Production | Air Cool Condenser | Main Plant | North Side | ረጋ | ť |
| Ø 🔒 | Cooling Tower ST1 | | | 1 | 1 | <u>4</u> | In-Service | | | | | മ | Ú |
| Ø 8 | Eye Wash Station 572 | | | 1 | <u>8</u> | Z | In-Service | Safety | Eye Wash Station | West Plant | West | മ | Û |

• Click the **Import Assets** button to bring up the **Asset Import** window.

| | mport Template | | | Sel | lect Asset File | e to Import | | | | | |
|-------------|----------------|---------|-----------|-------------|-----------------|-------------|----------|---------------|-------|------------|--------|
| | | | | Import File | e must use | e UTF-8 er | ncoding | Complete Impo | rt Re | eview Impo | ort Re |
| g | Description | Barcode | NFC Value | Class | Туре | Area | Location | Storage Group | Form | RFID | Ê |
| | Description | Barcode | NFC Value | Class | Туре | Area | Location | Storage Group | Form | RFID | |
| Description | | Barcode | NFC Value | Class | Туре | Area | Location | Storage Group | Form | RFID | Ű |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

- Click View Import Template to download a CSV template. This template defines the available columns for asset definition and includes help information above the column headers. When using the file, column header labels cannot be modified and must remain in English. Columns can be moved or rearranged as long as the column headers remain the same.
- Edit the CSV template specifying a single new or existing asset per row.
- To specify Asset fields with commas or multi line Asset Descriptions, wrap the field name in quotes.
- Once you have edited and saved the CSV file, Select "Select Asset File to Import file" to load the file.
- A validation window will appear with all the configuration of the form imported from the csv file.





• If the csv file has validation issues a pop-up window will appear indicating the errors found. Each error will also display the row number within the file so that they can easily be corrected. Make a note or take a screenshot to remember all errors and fix them before attempting to import.

| A | set Import | | | | | | | | | | | | |) | | | × |
|---|---|---------------------------|--------------------|---------------------|--|--|-------|---|--|-----------|---------------------|--------------------|---|---|------------------|-----------------|---|
| | View Import Template CSV Import Errors • Row 2 Column 190 Error Quotes/InvalidQuotes: Trailing quote on quoted field is malformed starting around ["Bad "Example] • Row 2 Column 190 Error Quotes/MissingQuotes: Quoted field unterminated starting around ["Bad "Example] • Row 2 Column 190 Error Quotes/MissingQuotes: Quoted field unterminated starting around ["Bad "Example] | | | | | | | | | te Import | Rev | iew Import Results | | | | | |
| # | Тад | Description | | | | | | | | | | | | | Serial Number | Model Number | ŵ |
| 1 | Example, Tag | Multi line Description | Example Barcode | Examp le" NFC | | | | | | | Exam ple RFID | Bad Examp le | | | | | Û |
| | | | | | | | | | | | | | | | | | |
| • | | | | | | | | | | | | | | | | | |
| • | | | | | | | | | | | | | | | | | |
| • | | | | | | | | | | | | | | | | | |
| | | | | | | | Count | 1 | | | | | | | | | |
| | | | | | | | Count | 1 | | _ | | | _ | | | _ | _ |

• Press "Complete Import" to complete the creation and or modification of Assets in the selected Storage Group





Building and Publishing Forms [Admin, Editor]

 Use the left navigation panel to view the hierarchical structure of your company's organization. As you add your forms, use this panel to select a sub-group which will allow you to add forms within it

| - Helios Solar | « | Helios Solar | / Plant 2 | | | | | | | |
|----------------|----------|--------------|------------|--------|--------|-------|---------------|-------|-------------|--------------------|
| Plant 1 | | Forms | Form Tools | Assets | Rounds | Tasks | External Tags | Users | User Groups | Plant 2 Properties |
| Plant 2 | | | | | | | | | | |

• Select the Forms Tab. The Forms page appears.

| Forms | Form Tools Assets Round | ls Tasks | External Tags | Users | User Groups | Mojave Propertie | S |
|----------------|----------------------------|----------|---------------|-------|-------------|------------------|---------------|
| New Form | Show Versions Import Forms | | | | | | Q Sear |
| | Name | As | sets Rounds | Tasks | Reports | Version | |
| 2 🖨 | 1st Section | 0 | 1 | 0 | 0 | Version 2 | മ |
| 2 0 | <u>AC - W Form</u> | 0 | 1 | 1 | 1 | Version 2 | മ |
| 8 🖶 | ADNOC Pump Form | 1 | 1 | 1 | 1 | Version 2 | മ |
| 2 🔒 | <u>AHU 20</u> | 0 | 0 | 0 | 0 | Version 0 | മ |
| 2 🖨 | Air Compressor | 0 | <u>3</u> | 1 | 2 | Version 6 | മ |
| 8 🖶 | AlphaPumpForm | 1 | 1 | 0 | 1 | Version 1 | മ |
| 2 🖨 | April 1 Form | 1 | 0 | 0 | 1 | Version 1 | മ |
| 2 🔒 | Bearing Failure Inspection | 0 | 0 | 0 | 0 | Version 0 | മ |

• Create a new form by selecting New Form. The **Form designer** window appears.

Note: The form name will be highlighed on the left and the form settings will be displayed on the right.

- The Navigation window is on the left while the details of the item selected are in the right hand window.
- Enter the name of the form in Form name.





| Form Designer New Form1573769581233 • • • • (1 Pages, 0 Steps) | | - | 8 | ۲ | × |
|---|---------------|---|--------|--------------------------|---|
| New Page New Step | Form Settings | | | | |
| New Form1573769581233 | Form Settings | | Unpubl | ished 0 0 0.0.0 | |

Note: The label on the left will update with the text entered in the Form name text field.

When Version Tracking for Forms is enabled at the Storage Group level the Version tracking items will also appear in the Form Settings window as shown below:

| Form Designer New Form1573769727181 x 0.00 (1 Pages, 0 Steps) | | | | | | 2 | } 8 | 8 | × |
|--|------|-----------------------|-----------------------|------|------|------|-----|-----------|---|
| New Page New Step | ¥ F | orm Settings | | | | | | | |
| New Form1573769727181 | Form | n Name | | | | | | | |
| ▲ New Page 伦 會 | | New Form15737 | 69727181 | | | | | | |
| | Dese | cription | | | | | | | |
| | | Enter Form Desc | ription | | | | | | |
| | | | / | | | | | | 8 |
| | | ion Tracking 🕊 | | | | | | | |
| | ID | | Optional ID | | | | | | |
| | Log | Log Reason for change | | | | | | | |
| | | | | | | | | 11 | |
| | | itional Informatio | n | | | | | | |
| | Sta | tus | | | | | Un | published | |
| | Ass | sociated Assets | | | | | | 0 | |
| | Tas | ks using this Form | n | | | | | 0 | |
| | Rep | port based on this | Form | | | | | 0 | |
| | Ver | sion | | | | | | 0.0.0 | |
| | Vere | ion Tracking Log | | | | | | | |
| | | | 3769727181 🗐 Show All | | | | | | |
| | Ver | sion-Serial-Status | 5 | User | Туре | Date | Loj | 9 | |
| | | | | | | | | | |
| | | | | | | | | | |
| • | | | | | | | | | |

The Version Tracking Log section displays information about the Form and updates throughout the life of the Form in GoPlant. The default view shows the last version change along with the Log. The "Show All" button will display all version notes for this Form.





When Version Tracking for Forms is enabled and required at the Storage Group level the Version tracking items will appear in the Form Settings Window as shown below. Note that if they are required the extra red "Required" label is displayed:

| Fo | rm Designer New Form1573769876437 v. 0.00 | (1 Pages, 0 | Steps) | | | | | | | B | ۲ | × |
|----|---|-------------|---------|----|----------------------|---------------------|------|------|--------|-------|--------|---|
| = | New Page New Step | | | ~ | Form Settings | | | | | | | |
| | New Form1573769876437 | | * | Fo | rm Name | | | | | | | |
| | New Page | 伯會 | | | New Form15737 | 69876437 | | | | | | |
| | | | | De | scription | | | | | | | |
| | | | | | Enter Form Desc | ription | | | | | | |
| | | | | | | / | | | | | h | |
| | | | | | rsion Tracking Re | equired 🗶 | | | | | | |
| | | | | IC | D | Optional ID | | | | | | |
| | | | | L | og | Reason for change | | | | | | |
| | | | | | Iditional Informatio | | | | | | | |
| | | | | | itatus | | | | ₽ ₽ | Unput | lished | |
| | | | | A | ssociated Assets | | | | | | 0 | |
| | | | | Т | asks using this Forr | n | | | | | 0 | |
| | | | | R | teport based on this | Form | | | | | 0 | |
| | | | | V | ersion | | | | | | 0.0.0 | |
| | | | | Ve | rsion Tracking Log | a | | | | | | |
| | | | | Na | ime: New Form157 | 3769876437 Show All | | | | | | |
| | | | | V | ersion-Serial-Status | 3 | User | Туре | Date | Log | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | ÷ | | | | | | | | | |

- Enter the form description in **Description**.
- Select the ^ New Page text under the new form name. Note: Do not select the New Page button.

| Form Designer New Form1573769876437 $_{\star0.00}$ (1 Pages, 0 Steps) | | - | B | ۲ | × |
|--|---|---|---|---|---|
| New Page New Step | ✓ Page Settings | | | | |
| New Form1573769876437 | Page Title | | | | |
| ▲ New Page 役 音 | New Page | | | | |
| | Show Page Title 🔲 | | | | |
| | ✓ Page Visibility Rules | | | | |
| | First Page Cannot have Visibility Rules | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |





• The page settings appear on the right.

| Form Designer New Form1573769876437 x 000 (1 Pages, 0 Steps) | | B | 0 | × |
|---|---|---|----|---|
| New Page New Step | ✓ Page Settings | | | |
| New Form1573769876437 | Page Title | | | |
| ▲ New Page 鉛 値 | New Page | | // | |
| | Show Page Title 🗐 | | | |
| | ✓ Page Visibility Rules | | | |
| | First Page Cannot have Visibility Rules | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

• Enter the title of the page in **Page title**.

• Select the option to show the page title, if desired.

Note: The first page can not have visibility rules because one page must always be visible.

• Create a new step by selecting . The step is displayed on the left and the step settings are displayed on the right.

| Form Designer New Form1573769876437 x 0.00 | (1 Pages, 0 Steps) | | - | B | 0 | × |
|---|--------------------|---|---|---|---|---|
| New Page New Step | | ✓ Page Settings | | | | |
| New Form1573769876437 | 企 自 | Page Title New Page | | | | |
| | | Show Page Title | | | | |
| | | ✓ Page Visibility Rules | | | | |
| | | First Page Cannot have Visibility Rules | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | ÷ | | | | | |





Note: As new steps and pages are created, they will be displayed on the left and can be rearranged in any order by selecting and dragging the page/step to the appropriate place. When dragging a step or page and moving it, ensure that the gray background is highlighted before dropping it into place. If the gray area does not appear, the step has nowhere to "move" and will stay in its original place.

| Form Designer New Form157 | 3769876437 v. o. | (1 Pages, 1 | Steps) | | ٢ | B | ۲ | × |
|-----------------------------|------------------|--------------|--------|--|---|---------|------|---|
| New Page New Step | New Step with | n Visibility | • | ✓ Step Settings | | | | |
| New Form157376 | 9876437 | | | Answer type Short Text | | | | |
| ∧ New Page | | 2 | | Short lext | | | | |
| New Step - 1 | Short Text | 4 8 | | Step Text (388 Left) | | | | |
| | | | | New Step - 1 | | | 1 | |
| | | | | Step Note (400 Left) | | | | |
| | | | | Enter Step Note | | | , | |
| | | | | Options Required Show Answer History Enter Default Answer Enter Default Answer | | | | |
| | | | | ✓ Step Triggers | | | | |
| | | | | | | Add tri | gger | |
| | | | | ✓ Step Visibility Rules | | | | |
| | | | | First step element can not have visibility rule | | | | |
| | | | Ŧ | | | | | |

• Select and highlight Step - 1 to update the step settings on the right.

| New Step - 1 Short Text C Short Text C Multi-Line Text Number List Yes/No Lookup Date/Time Short Coutment En Scan Location Take picture Drawing Verwing Signature | New Page New Step | New Step wit | th Visibility | • | ~ | Step Settings | | |
|---|-------------------|--------------|---------------|---|------------------|--|----------|------|
| Scan Location Take picture Drawing Signature Calculation Instruction Step Visibility Rules | ∧ New Page | | | * | Ste Ste Op | Short Text Short Text Multi-Line Text Multi-Line Text List Yes/No Losk Date/Time Show Document | | |
| Instruction Xed diagon | | | | | | Scan Location Take picture Drawing | | |
| | | | | | | Instruction | Add trig |)ger |

• Select the type of step to create by selecting an answer type from the dropdown (each new step will have a default answer type that can be changed in the settings)





- a. **Short Text:** Use this option when you want to allow the user to type in a short text answer. Letters, numbers, and symbols may be used. Mobile devices may allow dictation.
- b. **Multi-Line Text**: Use this option when you want to allow the user to type in an answer that may require more than one line (2, 3, 5, and 10).
- c. **Number**: Use this option when you want the user to enter a number (numbers can be used in calculations).
- d. List: Use this option to allow the user to select an answer from a pre-determined list (radio buttons, checkboxes, dropdown). The use of radio buttons and dropdowns will allow a user to select only one value from the list. When using checkboxes, the user will have the option to select multiple values from the list.
- e. **Yes/No**: Use this option when you want to designate an answer value as a Yes/No or True/False statement. The user also has the option to include N/A, if needed.
- f. **Previous**: Use this option when you want to pull a value from a previously answered step. The value displayed will be the result of the chosen step the last time the form was saved and committed.
- g. Lookup: Use this option when you want to reference pre-defined key/value table. The step data type will reflect the data type of the value within the lookup table and can be used in calculations when the value is a number. *Note: The lookup table must first be created in Form Tools and can have several options to display. In addition, when using the "Answer From Step" option, all text entries made by operators MUST match exactly (entries are case sensitive).*
- h. **Date/Time**: Use this option when you want the user to select a Date and Time. There is an option to display only the date, only the time, or display both date and time. There is also the option to default this field to the current date and time.
- i. **Show Popup Message**: Use this option when you want to alert a user with information and/or you want the user to act and require acknowledgement by the user. You must associate this answer type step to a previous answer through our visibility rules feature, as well as set the criteria in which this step will display.
- j. **Show Document**: This option is available for displaying documents within a form. *Note: The document must first be uploaded in Form Tools.*
- k. **Scan Code**: Use this option when you want the user to scan an asset barcode/QRcode or NFC/RFID tag within a form. The type of scan is chosen within the step. *Note: This step is limited to only mobile devices (not through the GoPlant website). In addition, all text entries made by operators MUST match exactly (entries are case sensitive).*
- Scan Location: Use this option to verify that an operator is at a certain location or has scanned a specific tag. This step forces the operator to scan a barcode/QRcode or NFC/RFID tag in order to complete the form. GoPlant Mobile will not continue the Round or commit the form until the proper value is scanned.
- m. **Take Picture**: This option will give the user the ability to use the camera on a handhold or select images from the handhold's memory.
- n. **Drawing**: Use this option when you want the user to have the ability to sketch a small drawing.
- o. Signature: Use this option when you require the user to enter a signature.





- p. Calculation: Use this step when you want to display the result of a calculation. This calculation can be created by entering a formula and using the results of any numeric step values already defined in the form. The Calculation step will display all previous numeric steps within the Form. The listing of Numeric steps is then given an Alias name to be used in the formula. The Alias name should not be a numeric value but can be an alpha-numeric item if it begins with an alphabet character. The formulas are entered along with choosing a precision value and clicking on the "=" will execute the formula and display an answer based upon the "Test Value" number entered. This enables the user to verify their calculation. It is important to not repeat Alias names, they must be unique. Calculations can point to other calculation steps; simply create an alias name and it can be used in subsequent calculations.
- q. **Instructions**: Use this option when you require instructions/text within the form. An Instruction step is free-form HTML text that can be saved anywhere on the form.

| Form Designer New Form15737 | 769876437 x. 0.00 (1 Pages, | 1 Steps) | | ٢ | B | ۲ | × |
|-------------------------------|-----------------------------|-----------|--|---|---------|------|---|
| New Page New Step | New Step with Visibility | • | ✓ Step Settings | | | | |
| New Form1573769876437 | | | Answer type | | | | |
| ∧ New Page | 41 | | Short Text 💌 | | | | |
| New Step - 1 | Short Text 🙆 🗇 | | Step Text (388 Left) | | | | |
| | | | New Step - 1 | | | | |
| | | | Step Note (400 Left) | | | | |
| | | | Enter Step Note | | | , | |
| | | | Options Required Show Answer History Enter Default Answer Enter Default Answer V Step Triggers | | | | |
| | | | ✓ sep myges | 1 | Add tri | gger | |
| | | | ✓ Step Visibility Rules | | | | |
| | | | First step element can not have visibility rule | | | | |
| | | | | | | | |

- Select and highlight **New Step-1** to update the step settings on the right.
- Type in or add the appropriate step information in the Step Settings.

Note: The step settings may differ depending on the answer type selected.

- a. **Step Text**: This is the question or value that you want the User to answer or input in to the mobile device.
- b. **Step Note**: This field is used to enter additional Notes to be displayed under the Step Text on the mobile device.
- c. **Options**: As an Admin or Editor, this allows you to select a step question as Required, Show answer History, or both.
- d. **Default Answer**: The Admin or Editor will have the ability to set default answer values. The default answer will automatically display in the answer field, but the operator has the option to change the value as needed.





Step Triggers: Rules can be created to trigger emails, change the state of an asset, or set Alarm conditions for reporting and alerting. A user can define triggers that define the conditional formatting rules on the data during reporting analysis. This will create the exceptions that are generated in reports.

e. **Step Visibility Rules**: Visibility rules can be created such that the step or page will be displayed or not displayed based on certain conditions.

Note: Visibility rules cannot be created for the first step (first step will always be visible).

| m Designer New Form1 | 573769876437 v. 0.00 (| 1 Pages, 1 | Steps) | | | ٢ | B | ۲ | |
|------------------------|------------------------|--------------|--------|--|------------------|-----|---------|-----|--|
| New Page New Step | New Step with V | 'isibility ' | • | ✓ Step Settings | Saving | | | | |
| New Form15737 | 69876437 | | ^ | Answer type | Successfully Sav | ed! | | | |
| ∧ New Page | | 42 | | Short Text 🔍 | | | | | |
| New Step - 1 | Short Text | 41 章 | | Step Text (388 Left) | | | | | |
| | | | | New Step - 1 | | | | | |
| | | | | Step Note (400 Left) | | | | | |
| | | | | Enter Step Note | | | | | |
| | | | | Options Captions Required Characteristics Char | | | | | |
| | | | | ✓ Step Triggers | | A | dd trig | aer | |
| | | | | | | | | | |
| | | | | ✓ Step Visibility Rules | | | | | |
| | | | | First step element can not have visibility rule | | | | | |
| | | | | | | | | | |
| | | | ~ | | | | | | |

Save the form by selecting





| Form Designer New Form1573769876437 x 0.00 (1 Pages, 1 Steps) | | 6 | 80 | × |
|---|---|-----|------------|----------|
| New Page New Step New Step with Visibility | ✓ Step Settings | | | |
| New Form1573769876437 | Answer type | | | |
| へ New Page 企 | Short Text 💌 | | | |
| New Step - 1 Short Text | Step Text (388 Left) | | | |
| | New Step - 1 | | | |
| | Step Note (400 Left) | | | ~ |
| | Enter Step Note | | | |
| | | | | |
| | Options | | | |
| | Required Show Answer History | | | |
| | Enter Default answer | | | |
| | Enter Default Answer | | | |
| | ✓ Step Triggers | | | |
| | | | dd trigger | |
| | | _ A | aa uigger | |
| | ✓ Step Visibility Rules | | | |
| | First step element can not have visibility rule | | | |
| | | | | |
| | | | | |
| v | | | | |
| | | | | |
| | | | | |
| New Form1573769876437 | | | | × |
| New Form15/37688/76437 | | | | × |
| | | | | × |
| New Form1573769076437 New Step - 1 | | | | × |
| | | | | × |
| | | | | × |
| | | | | × |
| | | | | × |
| | | | | × |
| | | | | × |
| | | | | × |
| | | | | × |
| | | | | × |
| | | | | × |
| | | | | × |
| | | | | × |
| | | | | × |
| | | | | × |
| New Step - 1 | | | | |
| | 1/1 | | Comm | |

• Optional: See a preview of the form by selecting of icon.





| Form Designer New Form1573769876437 | x 0.00 (1 Pages, 1 Ste | os) | | ٢ | B | 3 | × |
|---------------------------------------|------------------------|-----|---|---|---------|----------|---|
| New Page New Step New Step | with Visibility 💌 | ~ | Step Settings | | | 0 | |
| New Form1573769876437 | | Â | inswer type | | | | |
| ∧ New Page | 41 | | Short Text 💌 | | | | |
| New Step - 1 Short Text | 合金 | s | tep Text (388 Left) | | | | |
| | | | New Step - 1 | | | | |
| | | s | tep Note (400 Left) | | | | |
| | | | Enter Step Note | | | | |
| | | E | Options Required B Row Answer History Retrieved to the second | • | Add tri | gger | |
| | | - | | | | | |

• Publish the form by selecting . When you select publish, the form is automatically saved first then published.

| Form Designer New Form1573769876437 v.1 (1 Pages, 1 Steps) | | s 🖉 👁 🗙 |
|---|---|-------------------------|
| New Page New Step New Step with Visibility 💌 | ✓ Step Settings | Validation Passed |
| New Form1573769876437 | Answer type | Saving |
| ∧ New Page | Short Text 🖤 | Publishing |
| New Step - 1 Short Text | Step Text (388 Left) New Step - 1 | Successfully Published! |
| | Step Note (400 Left) | ĥ |
| | Enter Step Note | h |
| | Options Ceptions Show Answer History | |
| | Enter Default answer Enter Default Answer | |
| | ✓ Step Triggers | |
| | ✓ Step Visibility Rules | |
| | First step element can not have visibility rule | |
| | | |
| | | |

Note: Once a form is published it will be available to all users as well as available for use in associating Assets, Rounds, Tasks, and Reports/Charts.





| Fo | m Designer New Form157 | 3769876437 x 1 (1 Pages, 1 | Steps) | | | Ø | ٢ | × |
|----|--------------------------|----------------------------|--------|---|---|---|---|---|
| ≡ | New Page New Step | New Step with Visibility | - | ✓ Step Settings | 0 | | | |
| | New Form157376 | 9876437 | ^ | Answer type | | | | |
| | ∧ New Page | | | Short Text 💌 | | | | |
| | | | | Step Text (388 Left) | | | | |
| | | | | New Step - 1 | | | , | |
| | | | | Step Note (400 Left) | | | | |
| | | | | Enter Step Note | | | , | |
| | | | | Options | | | | |
| | | | | Required | | | | |
| | | | | Show Answer History | | | | |
| | | | | Enter Default Answer | | | | |
| | | | | Enter Detault Answer | | | | |
| | | | | | | | | |
| | | | | ✓ Step Triggers | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | ✓ Step Visibility Rules | | | | |
| | | | | First step element can not have visibility rule | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | Ψ | | | | | |

• Once the Form is published, add External Tags via the External Tag Editor by selecting External Tags are used to assign specific Step questions on the form with external software "Tags" that allow for reporting output, external data queries via the GoPlant API, or CSV ouptut reports. External Tags are assigned by Asset / Form relationships, or in some cases just the Form relationship. The External Tag assigned to the Step flags that information on any response from the field and allows for exporting the reading / response to external software packages.

| Form Designer New Form1573769876437 < 1 (1 Pages, 1 Steps) | | • | Ø | ٢ | × |
|---|--|---|---|---|---|
| New Page New Step New Step with Visibility 💌 | ✓ Step Settings | | 0 | | |
| New Form1573769876437 | Answer type | | | | |
| ∧ New Page | Short Text 🔍 | | | | |
| New Step - 1 Short Text | Step Text (388 Left) | | | | |
| | New Step - 1 | | | | |
| | Step Note (400 Left) Enter Step Note | | | | |
| | Options a Required b Show Answer History Enter Default Answer Enter Default Answer ✓ Step Triggers | | | | |
| | Step Visibility Rules First step element can not have visibility rule | | | | |
| | | | | | |





| Form Designer New Form157 | 3769876437 x 2 (1 Pages, 1 | Steps) see | e Published Copy | o 🗊 | 8 (| 3 | × |
|-----------------------------|----------------------------|------------|--|-----------------------|------------|----|---|
| New Page New Step | New Step with Visibility | • | ✓ Step Settings | Creating Working Copy | | | |
| New Form157376 | 9876437 | * | Answer type | Working Copy Created | | | |
| ∧ New Page | 41 | | Short Text 🔍 | | | | |
| New Step - 1 | Short Text | | Step Text (388 Left) | | | | |
| | | | New Step - 1 | | | // | |
| | | | Step Note (400 Left) | | | | |
| | | | Enter Step Note | | | | |
| | | Ŧ | Options Carlot Required Show Answer History Enter Default Answer Enter Default Answer ✓ Step Triggers ✓ Step Visibility Rules First step element can not have visibility rule | | Add trigge | PF | |

• To edit a form after it is published, you must create a "working copy" by selecting *(i)*, select the save icon when ready to save, and the publish icon to publish again. Only working copies of Forms may be edited. Working Copies enable users to modify Forms without disrupting the published copies on mobile devices.

| Form Designer New Form157 | 3769876437 v. 2 | (1 Pages, 1 Step | S) See Publis | ahed Copy | ٢ | Û | B | ۲ | × |
|-----------------------------|-----------------|------------------|----------------|---|---|---|----------|------|---|
| New Page New Step | New Step with | h Visibility 🔍 🔻 | | ✓ Step Settings | | | | | |
| New Form157376 | 9876437 | | ^ | Answer type | | | | | |
| ∧ New Page | | රැ | | Short Text 📼 | | | | | |
| New Step - 1 | Short Text | 42 8 | | Step Text (388 Left) | | | | | |
| | | | | New Step - 1 | | | | | |
| | | | | Step Note (400 Left) | | | | | |
| | | | | Enter Step Note | | | | | |
| | | | | Options ■ Required ■ Show Answer History Enter Default Answer ✓ Step Triggers | | | | | |
| | | | | | | | Add trig | iger | |
| | | | | ✓ Step Visibility Rules | | | | | |
| | | | | First step element can not have visibility rule | | | | | |
| | | | | | | | | | |
| | | | × | | | | | | |

• Optional: An editor can switch between the working copy and published copy by selecting the link at the top of the working copy in the Form Designer.





| Form Designer New Form157 | /3769876437 v. 2 | (1 Pages, 1 | Steps) see | Published Copy | ٢ | Î) | B | ۲ | × |
|-----------------------------|--|---------------|-------------|--|---|----|----------|------|---|
| New Page New Step | New Step wit | th Visibility | • | ✓ Step Settings | | 0 | | | |
| New Form157376 | New Step New Step with Visibility W Form1573769876437 New Page 2 | * | Answer type | | | | | | |
| ∧ New Page | | | | Short Text 💌 | | | | | |
| New Step - 1 | Short Text | | | Step Text (388 Left) | | | | | |
| | | | | New Step - 1 | | | | _ | |
| | | | | Step Note (400 Left) | | | | | |
| | | | | Enter Step Note | | | | / | |
| | | | | Options Required Show Answer History Enter Default Answer Enter Default Answer Step Triggers | | | Add trij | gger | |
| | | | * | Step Visibility Rules First step element can not have visibility rule | | | | | |

• An editor can delete a working copy by selecting in the Form Designer. This deletes any changes made in the working copy, and leaves the last published version of the Form. This does not delete the entire Form, only the working copy that was created.

| Forms | Form Tools Assets Round | s Tasks Ext | ernal Tags | Users | User Groups | Mojave Prop | arties | |
|----------------|----------------------------|-------------|------------|-------|-------------|-------------|--------|------|
| New Form | Show Versions Import Forms | | | | | | Q Sea | erch |
| | Name | Assets | Rounds | Tasks | Reports | Version | | |
| 3 🖶 | 1st Section | 0 | 1 | 0 | 0 | Version 2 | ළ | |
| 8 0 | AC - W Form | 0 | 1 | 1 | 1 | Version 2 | ත | |
| 8 0 | ADNOC Pump Form | 1 | 1 | 1 | 1 | Version 2 | ළු | |
| 8 🕀 | AHU 20 | 0 | 0 | 0 | 0 | Version 0 | ළ | |
| 88 | Air Compressor | 0 | 3 | 1 | 2 | Version 6 | ළ | |
| 3 8 | AlphaPumpForm | 1 | 1 | 0 | 1 | Version 1 | ත | |
| 3 🖯 | April 1 Form | 1 | 0 | 0 | 1 | Version 1 | ළ | |
| 8 8 | Bearing Failure Inspection | 0 | 0 | 0 | 0 | Version 0 | ත | |
| 38 | Boiler Feed Pump Form | 1 | 2 | 5 | 0 | Version 15 | ළ | 1 |
| 38 | Breaker Stack System | 0 | 0 | 0 | 0 | Version 1 | ත | |

• From the Forms Tab, the list of Forms in the Storage Group is displayed. If a working copy is available, a user can open to view/edit the working copy of a form by selecting ¹ in the form list.





- Working with Triggers in the Form Designer [Admin, Editor]

The Form Designer provides the ability to add triggers to a form to initiate an action when necessary.

Defining triggers within a step can provide the following:

- Send Email (Normal, Warning, Critical) emails are generated and sent by GoPlant once the form is completed by the operator and the data has been synced to the server. When configuring an email trigger, the editor can select pictures from Take Picture steps in the form to be included in the email.
- 2. **Change Asset State** Asset states within the GoPlant system can be managed using this option.
- 3. Define Exceptions and Conditional Formatting for *LoLo, Lo, Normal, Hi, HiHi* in **Reports**. For Number and Calculation steps. Data can be displayed with conditional formatting in reports, completed rounds, and completed forms. It can also be viewed as exceptions in system exception reports.
- 4. Define Exceptions and Conditional Formatting for State Conditions in Reports. For Yes/No, List, Lookup, Multiline Text, Short Text, Scan Code, Scan Location, Drawing and Signature steps. Data can be displayed with conditional formatting in reports, completed rounds, and completed forms. It can also be viewed as exceptions in system exception reports.





| For | m Designer Cold Salt Tar | nk Form = 0.00 (1 | Pages, 10 S | leps) | | | | 0 | 8 | × |
|-----|----------------------------|-------------------|----------------|--|--|---------------|--------------------|-------|-----------|---|
| ≡ | New Page New Step | New Step wi | ith Visibility | - | ✓ Step Settings | | | | | Î |
| | Cold Salt Tank F | orm | | * | Answer type | | | | | I |
| | ∧ New Page | | දා ම | | | | | | | |
| | Level | Number | 合音 | | Step Text (383 Left) Hot Water Flow In | | | | | |
| | Hot Water Flow In | Number | ළු ම | | FIGE VERSEL FIGHT IT | | | | | |
| | Hot Water Flow Out | Number | 4) 8 | | Step Note (400 Left) | | | | | |
| | Cold Water Flow In | Number | 42 8 | | Enter Step Note | | | | | |
| | Cold Water Flow Out | Number | 42 8 | | | | | | h | |
| | Tempering Valve | Yes/No | 4 8 | | Options Required | | | | | |
| | Pump Flow | Number | 41 8 | | Show Answer History | | | | | |
| | Button Temperature | Number | 43 8 | | Range | | | | | |
| | Take a Picture | Take Picture | 4 8 | | Minimum Value | Maximum Value | Number Of Decimals | | | |
| | Signature | Signature | ළු ම | | Enter Number | Enter Number | 2 | | | |
| | | | | ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~ | Enter Default answer Enter Default Answer Step Triggers Step Visibility Rules | | ~ | + Add | l trigger | |

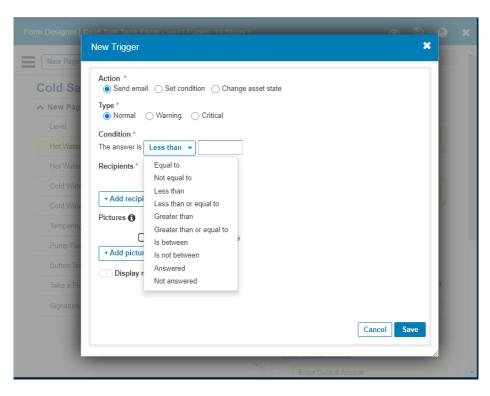
• Select "Add Trigger" in the Step Triggers section within a step setting.

| Form Designer Cold Salt Tank Form x 600 (1 Pages 10 Steps) | | | × |
|---|--------|------|---|
| New Trigger | | × | A |
| Action * Send email Set condition Change asset state | | | |
| ∧ New Pag Type* | | - 11 | |
| Level Condition * | | - 18 | |
| Hot Water The answer is Less than 💌 | | 10 | |
| Hot Water Recipients * | | - 11 | |
| Cold Wate | | - 11 | |
| + Add recipients | | 4 | |
| Pictures () | | - 11 | |
| Pump Flg | | - 18 | |
| + Add picture Button Te | | - 11 | |
| Display message to operator * | | | |
| Signature | | - 11 | |
| | Cancel | ave | |
| | | | - |

• To send an email, select the "Send email" Action and then select the Type of email to send.







• Chose the "**Condition**" when the email will be sent from the drop-down list and then enter any required value.

| Form Designer Co | Id Salt Tank Form | | | | |
|------------------------|---|-------|-----|---|---|
| New Page | New Trigger | | × | | |
| Cold Sa | Action * Send email Set condition Change asset state | | | | |
| ∧ New Pag | Type * Normal Warning Critical | | | l | |
| Level Hot Water | Condition * The answer is Less than • 15 | | | | |
| Hot Water | Recipients * | | | | |
| Cold Wate Cold Wate | + Add recipients | | | | |
| Tempering | Pictures () | | | l | |
| Pump Flo Button Ter | New Page \ Take a Picture + Add picture | | | l | |
| Take a Pic | Display message to operator * | | | ŧ | |
| Signature | | | | | |
| | Canc | el Sa | ive | | |
| | Enter Default Answer | | | | Ţ |

• Use the "Add recipients" button to select who will receive the email.





| Forn Designer Cold Salt Tank Form Law (1 Panes, 10 Steps.) | n P X | | |
|--|----------|-----------|--|
| New Page | • | | |
| Cold Sa Send email O Set condition Change asset state | * | | |
| ∧ New Pag Type * ○ Normal | | | |
| Level Condition * | | | |
| Hot Water The answer is Less than 🔹 15 | | 4 | |
| Hot Water Recipients * | | | |
| Cold Wate | | | |
| Cold Watt & Safety Inspector | - 1 | <u>li</u> | |
| Temperin: + Add recipients | | | |
| Pump Flo | | | |
| Button Te | | | |
| Take a Pit + Add picture | | £ | |
| Signature Display message to operator * | - | | |
| Cancel | Save | | |
| | | | |
| Enter Default Answer | | | |

• In the "**Pictures**" section use the check boxes to include pictures from existing "Take Picture" steps. Or choose the "**Add picture**" button to configure a new picture.

| New Page | New Trigger | × | | |
|------------------------------|--|----------------------------|---|--|
| Cold Salt | Action * Set condition Change asset state | | | |
| ∧ New Page | Type * Normal Warning Critical | | | |
| Level Hot Water Fl | Condition * The answer is Less than v 15 | . II | | |
| Hot Water Fl | Recipients * | | | |
| Cold Water F | Cperations Supervisor | ÷ | | |
| Cold Water F | Safety Inspector | Û | | |
| Tempering V | + Add recipients | | | |
| Pump Flow | Pictures () | | | |
| Button Temp Take a Pictur | New Page \ Take a Picture | | | |
| Signature | + Add picture | | s | |
| Signature | Display message to operator * | | | |
| | | Cancel Save | | |
| | Send warning email to mu answer is less than 15 | Itiple recipients when the | Û | |

• Select the toggle to display a message to the operator in the field when an action is triggered.





| Form Designer Cold | Salt Tank Form Level (Pages 10 Store) New Trigger | | 9 (3) | |
|---|---|---|---------------|---|
| Cold Salt New Page Level Hot Water Fi Hot Water Fi | Action * Send email Set condition Change asset state Type * Normal Warning Critical Condition * The answer is Less than v 15 Recipients * | | | |
| Cold Water F | Cperations Supervisor | ÷ | 10 | |
| Tempering V Pump Flow Button Temp | Safety Inspector + Add recipients Pictures | ۵ | | |
| Take a Pictur Signature | New Page \ Take a Picture +Add picture Oisplay message to operator * | | r Of IIs | |
| | Operator response Optional Required | Æ | | |
| | Send warning email to answer is less than 15 | | the | ~ |

• Use the "**Operator response**" toggle to allow the operator in the field to enter a textual response to the message. Chose whether the response is mandatory or required using the radio buttons.

- Defining Exceptions and Conditional Formatting

Many type steps allow triggers for defining exceptions and conditional formatting in the completed form supervisory reviews, as well as the GoPlant System Reports.

Note: Conditional Formatting colors are globally defined in the Admin Report Settings.

1. Numeric Conditions (Exceptions)

Number and Calculation step types support "Numeric Conditions" which are used to trigger specific exceptions for certain ranges of values.

For instance, a pressure reading might have an acceptable range of 40 - 60 PSI. Multiple conditions can be configured using GoPlant's trigger functionality.





• When the answer is "Less than" 20, trigger a LoLo Condition.

| rm Designer Cold Salt T | ank Form vers (1 Pages, 10 Steps) New Trigger X | | | |
|--|---|----|--|--|
| Cold Salt Tank | Action * Send email • Set condition Change asset state Type * LoLo Loc Normal Condition * The answer is Less than 20 | | | |
| Level Hot Water Flow In Hot Water Flow Out | Display message to operator * | l | | |
| Cold Water Flow In Cold Water Flow Out | Cancel Save | 1. | | |

• When the answer "Is Between" 20 and 40, trigger a Lo Condition.

| New Page New S Cold Salt Tank New Page Level Hot Water Flow In Hot Water Flow In Cold Water Flow In Cold Water Flow In | | ak Form + em (1 Pages 10 Steps) New Trigger | | |
|---|--------------------|---|--|--|
| Hot Water Flow Out Cold Water Flow In Cancel Save | Cold Salt Tank | Type * LoLo Lo Normal Hi HiHi Condition * The answer Is between 20 and 40 | | |
| Cold Water How Out | Hot Water Flow Out | Cancel Save | | |

• When the answer "Is Between" 60 and 80, trigger a Hi Condition.

| | | | | | 0 | |
|---------------------|-------------|-----------------------------------|-------------|--|---|---|
| New Page New St | New Trigger | | × | | | |
| Cold Salt Tank | Action * | ○ Send email | | | | |
| Colu Salt Talik | Type * | 🔿 LoLo 🔿 Lo 🔿 Normal 💿 Hi 🔿 HiHi | | | | |
| ∧ New Page | Condition * | The answer Is between - 60 and 80 | | | | |
| Level | O Diselar | | | | | |
| Hot Water Flow In | Usplay m | essage to operator * | | | | |
| Hot Water Flow Out | | | | | | |
| Cold Water Flow In | | | Cancel Save | | | |
| Cold Water Flow Out | | | | | | |
| | | 라 · Options | | | | - |

• When the answer is "Greater than" 80, trigger a HiHi Condition.





| | Ink Form v nov (1 Pages 10 Steps) New Trigger | | × |
|---------------------|---|--|---|
| New Page New St | New Trigger X | | |
| Cold Salt Tank | Action * O Send email Set condition O Change asset state | | |
| | Type * O LoLo O Lo O Normal O Hi 💿 HiHi | | |
| ∧ New Page | Condition * The answer is Greater than - 80 | | |
| Level | Display message to operator * | | |
| Hot Water Flow In | Dishiay message to operation | | |
| Hot Water Flow Out | | | |
| Cold Water Flow In | Cancel Save | | |
| Cold Water Flow Out | | | |
| Tempering Valve | YesNo @1⊜ ▼ Options | | Ţ |

• When the four triggers are configured, they will be shown as follows in GoPlant

| Form Designer Pressure Reading | g Form v. ad | ∞ (1 Pages, 3 S | Steps) | | | ٢ | | ۲ | 2 |
|----------------------------------|--------------|-----------------|---------|--|--------------------|------|-----------|---|---|
| New Page New Step | New Step w | vith Visibility | Ŧ | ✓ Step Settings | | | | | |
| Pressure Reading F | orm | | * | Answer type Number | | | | | |
| ∧ New Page | | ත ම | | Number 👻 | | | | | |
| First Pressure Reading N | lumber | 0000 | | Step Text (378 Left) | | | | | |
| New Pressure Reading No | lumber | ළාම | | First Pressure Reading | | | | | |
| Take a Picture Ta | ake Picture | 心 🕯 | | Step Note (399 Left) | | | | | |
| | | | | Options Pacquied Pacquied Pacquied Pacquied Stark Asswer History Range Minimum Value D D D D D D D D D D D D D D D D D D D | Number Of Decimals | | | | |
| | | | | ✓ Step Triggers | | | | | |
| | | | | Set LoLo condition when the answer is less than 20 | | | 1 | I | |
| | | | | Set Lo condition when the answer is between 20 and 40 | | | P 🗄 | | |
| | | | | Set Hi condition when the answer is between 60 and 80 | | | e 1 | | |
| | | | | Set HiHi condition when the answer is greater than 80 | | | ø 🗄 | 1 | |
| | | | | | | + Ac | ld trigge | r | |

2. State Conditions (Exceptions)

Yes/No, List, Lookup, Multiline Text, Short Text, Scan Code, Scan Location, Drawing and, Signature step types support "State Conditions". These exceptions are configured in a similar manner in GoPlant.





| Pressure F | Action * | 🔘 Send emai | I 💿 State condition | O Change asset state | |
|----------------|-------------|-----------------|--------------------------|----------------------|--|
| New Page | Condition * | The answer is | Answered - | | |
| First Pressure | 🔵 Display m | essage to opera | Equal to | | |
| New Pressure | | | Not equal to Contains | | |
| | | | Does not contain | | |
| Pressure desc | | | Answered | | |
| | | | Not answered | | |
| | | | | | |
| | | | | | |

• Select the "State Condition" Action and then choose the Condition from the drop-down.

- Working with Visibility Rules in the Form Designer [Admin, Editor]

The Form Designer provides the ability to add visibility rules to a step or page within a form, allowing for more flexibility and action dependent upon another step answer. Visibility rules can only point to steps ABOVE or preceding the current step. The first step question and first page cannot by definition contain a visibility rule (as there are no preceding steps or pages).

Note: Visibility Rules can be defined within both Steps and Pages and MUST be defined below the step being referenced.

| Cold Salt Tank Form New Page 20 Level Number 20 Hot Water Flow In Number 20 Cold Water Flow Out Number 20 Please Contact Show 20 Supervisor. Message 20 Please Contact Show 20 Supervisor. Any of the following Rules match Coptional Any of the following Rules match Coptional Take a Picture Take picture Coptional Signature: Signature Coptional | New Page Image: Ima | New Page New Step | | | ✓ Step Settings | | | |
|---|--|---------------------|--------------|----------|----------------------------|---|---------|---|
| ∧ New Page ⊘ Level Number ⊘ Hot Water Flow In Number ⊘ Hot Water Flow Un Number ⊘ Cold Water Flow In Number ⊘ Cold Water Flow Un Number ⊘ Cold Water Flow Out Number ⊘ Tempering Valve Yes/No ⊘ Please Contact Show Supervisor. Pump Flow Number ⊘ Botton Temperature Number ⊘ Take a Picture Take picture Take picture | ∧ New Page Col Level Number Q ⊕ Hot Water Flow In Number Q ⊕ Cold Water Flow Out Number Q ⊕ Cold Water Flow Out Number Q ⊕ Cold Water Flow Out Number Q ⊕ Tempering Valve Yes/No Q ⊕ Please Contact Show Q ⊕ Supervisor. Add Rule Pump Flow Number Q ⊕ Botton Temperature Number Q ⊕ Take a Picture Take picture Q ⊕ Signature: Signature Q ⊕ | Cold Salt Tank F | orm | | | | | |
| Hot Water Flow In Number Plase Contact Supervisor. Hot Water Flow Out Number Plase Contact Supervisor. Cold Water Flow Out Number Plase Contact Supervisor. Cold Water Flow Out Number Plase Contact Supervisor. Please Contact Show Plase Contact Supervisor. Please Contact Show Plase Contact Supervisor. Pump Flow Number Plase Contact Supervisor. Any of the following Rules match Coptional And Rule Add Rule Take a Picture Take picture | Hot Water Flow In Number Plase Contact Supervisor. Hot Water Flow Out Number Plase Contact Supervisor. Cold Water Flow Out Number Plase Contact Supervisor. Cold Water Flow Out Number Plase Contact Supervisor. Tempering Valve Yes/No Plase Contact Supervisor. Plase Contact Show Plase Contact Supervisor. Pump Flow Number Plase Contact Supervisor. Botton Temperature Number Plase Contact Supervisor. Take a Picture Take picture Plase Contact Plase Contact Plase Contact Plase Contact Plase Plase Contact Plase Plase Contact Plase Plase Contact Plase Pla | ∧ New Page | | 42 | Show Pop Up Message 💌 | | | |
| Hot Water Flow In Number All B Cold Water Flow Out Number All B Tempering Valve Yes/No All B Please Contact Show All B Show this Step When Any of the following Rules match Coptional Any of the following Rules match Add Rule Metsage All B Take a Picture Take picture Take picture | Hot Water Flow In Number C III Cold Water Flow Out Number C III Cold Water Flow Out Number C IIII Cold Water Flow Out Number C IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII | Level | Number | \$ 4 m | | | | |
| Cold Water Flow In Number ¹ 2 ¹ | Cold Water Flow In Number | Hot Water Flow In | Number | 合命 | Please Contact Supervisor. | | | |
| Cold Water Flow Out Number Clinical Tempering Valve Yes/No Clinical Please Contact Show Clinical SuperVisor. Message Clinical Pump Flow Number Clinical Botton Temperature Number Clinical Take a Picture Take picture Clinical | Cold Water Flow Out Number | Hot Water Flow Out | Number | 42 @ | | | | 1 |
| Tempering Valve Ves/No Q @ Please Contact Show Q @ Supervisor Message Q @ Pump Flow Number Q @ Botton Temperature Number Q @ Take a Picture Take picture Q @ | Tempering Value Yes/No Q Q Please Contact Show Message Q B Pump Flow Number Q B Botton Temperature Number Q B Take a Picture Take picture Q B Signature: Signature Q B | Cold Water Flow In | Number | 合血 | | | | |
| Please Contact Supervisor. Show Message Image: Contact Message Show this Step When Image: Contact Message Image: Contact Message <thimage: contact<br="">Message Image: Contact Message<</thimage:> | Please Contact Supervisor. Show Message Page Pump Flow Number Page Botton Temperature Number Page Take a Picture Take picture Page Signature: Signature Page | Cold Water Flow Out | Number | 合曲 | ✓ Step Visibility Rules | | | |
| Please Contact Show Image: Contact Show Image: Contact Supervisor. Message Image: Contact Any of the following Rules match Image: Contact Pump Flow Number Image: Contact Image: Contact Image: Contact Image: Contact Botton Temperature Number Image: Contact Image: Contact Image: Contact Image: Contact Take a Picture Take picture Image: Contact Image: Contact Image: Contact Image: Contact | Please Contact Supervisor. Show Message Page Pump Flow Number Page Botton Temperature Number Page Take a Picture Take picture Page Signature: Signature Page | Tempering Valve | Yes/No | 4) 42 ti | | _ | | |
| Botton Temperature Number 23 B Take a Picture Take picture 23 B | Botton Temperature Number Q @ Take a Picture Take picture Q @ Signature: Signature Q @ | | | 合意 | | | ptional | |
| Take a Picture Take picture 션 📋 | Take a Picture Take picture 化 Signature: Signature 化 | Pump Flow | Number | 合曲 | | A | dd Rule | - |
| | Signature: Signature 션) 습 | Botton Temperature | Number | 合曲 | | 1 | 1 | |
| Signature: Signature 🖉 🔒 | | Take a Picture | Take picture | 合金 | | | | |
| | ▼ New Page - 2 | Signature: | Signature | 合命 | | | | |
| ✓ New Page - 2 | | ✓ New Page - 2 | | • C | | | | |
| | | | | | | | | |





Select "Add Rule" Add Rule or "Add Default Visibility Rule" does not a default visibility rule set in Visibility Rules section in the Step/Page settings.

| n Designer Cold Salt Ta | | - 1 agoo, 20 otop | | | | _ | | |
|-------------------------------|-----------------|-------------------|---|--|---|-----|------|---|
| New Page New Step | | | | ✓ Step Settings | | | | |
| old Salt Tank F | orm | | * | Answer type | | | | |
| New Page | | 62 | | Show Pop Up Message 💌 | | | | |
| Level | Number | \$ C i | | Message to show | | | | |
| Hot Water Flow In | Number | 合命 | | Please Contact Supervisor. | | | | |
| Hot Water Flow Out | Number | 伯白 | | | | | | 1 |
| Cold Water Flow In | Number | 仓亩 | | | | | | |
| Cold Water Flow Out | Number | 合曲 | | ✓ Step Visibility Rules | | | | |
| Tempering Valve | Yes/No | 440 | · | | | | | |
| Please Contact Supervisor. | Show Message | * fi | | Show this Step When Any of the following Rules match | • | | | |
| Pump Flow | Number | 42 @ | | When the answer to | | | | |
| Botton Temperature | Number | 合直 | | Tempering Valve | - | | Î | |
| Take a Picture | Take picture | 合命 | | Choose 👻 | | | | |
| Signature: | Signature | 4 @ | | | | | | |
| New Page - 2 | | 62 | | | | | Dute | - |
| | | | | | | Add | Rule | Ŧ |

Note: The background will appear in red indicating that all options should be selected, the validation icon will appear, by pressing the User will have more details of the validation failure.





| Form Designer Cold Salt | : Tank Form x 0.00 (2 | Pages, 23 Ste | , | 6 | 8 | ۲ | × |
|-------------------------------|--|---------------------|---|----|----------|----|---|
| New Page N | rm has validation Missing visibility deta visor." on page "New | ils found in step " | ase Contact Super | | | | |
| ∧ New Page | | | | Ок | | | |
| Hot Water Flow In | Number | 2 42 16 62 16 | Please Contact Supervisor. | | | | |
| Hot Water Flow Out | Number | 41 11 | | | | 11 | |
| Cold Water Flow In | Number | 名 亩 名 亩 | | | | | |
| Tempering Valve | Yes/No | 2 4 e | ✓ Step Visibility Rules | | | | |
| Please Contact Supervisor. | Show Message | · 11 | Show this Step When Any of the following Rules match | ~ | | | |
| Pump Flow | Number | 4 6 | When the answer to | | î | | |
| Botton Temperature | Number | 伯田 | Tempering Valve | ~ | | | |
| Take a Picture Signature: | Take picture Signature | 40 to | | | | | |
| ✓ New Page - 2 | | £ | | | Add Rule | T | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

Note: When all Visibility Rules options are selected, the background will change to white and the validation icon will disappear.

| New Page New Step | | | | Step Settings | | | | |
|-------------------------------|-----------------|--------------------|------|---|----------------|---|---|---|
| Cold Salt Tank | Form | | Â | iswer type | | | | |
| New Page | | රි | | Show Pop Up Mess | age 🔻 | | | |
| Level | Number | 습 ⁴ 2 @ | M | essage to show | | | | |
| Hot Water Flow In | Number | 名 前 | | Please Contact Sup | ervisor. | | | |
| Hot Water Flow Out | Number | 谷 前 | | | | | | , |
| Cold Water Flow In | Number | 42 前 | | | | | | |
| Cold Water Flow Out | Number | 合金 | Visi | bility Rule | | | | |
| Tempering Valve | Yes/No | 습 ⁴ 2 @ | | ndicator | | | | |
| Please Contact Supervisor. | Show Message | · 4 i | SI | Any of the followi | ng Rules match | ~ | | |
| Pump Flow | Number | 4 前 | v | All the following Ru Any of the followin | | | | |
| Botton Temperature | Number | 合意 | | Tempering Valve | | • | Ê | |
| Take a Picture | Take picture | 名 前 | | Equal to | • | | | |
| Signature: | Signature | 42 8 | | NOK | ~ | | | |
| New Page - 2 | | රු | | | • | | | |

Select when the page or step is visible by selecting the expression of when the rule(s) will be used.





Note: Multiple visibility rules can be added using "All the following Rules match" or "Any of the following Rules match" to allow for the logical "**AND**" or "**OR**" conditions.

| New Page New Step Cold Salt Tank Fc New Page Level | | CL CL | * | ✓ Step Settings Answer type Show Pop Up Message ▼ | | | | |
|--|-----------------|----------------------|---|---|---|----|--------|----|
| New Page | | Ch1 | * | | | | | |
| - | | ሪካ | | | | | | |
| Level | | | | Show Pop Up Message | | | | |
| | Number | ☆ 42 前 | | Message to show | | | | |
| Hot Water Flow In | Number | 合首 | | Please Contact Supervisor. | | | | |
| Hot Water Flow Out | Number | 合意 | | | | | | // |
| Cold Water Flow In | Number | 合合 | | | | | | |
| Cold Water Flow Out | Number | 合直 | | ✓ Step Visibility Rules | | | | |
| Tempering Valve | Yes/No | \ \ () (2) (2) | | | | | | |
| Please Contact Supervisor. | Show Message | @ 41 û | | Show this Step When Any of the following Rules match | ~ | | | |
| Pump Flow | Number | 4 🖻 | | When the answer to | | | | |
| Botton Temperature | Number | 合金 | | Tempering Valve | ~ | | Ê | |
| Take a Picture | Take picture | 合合 | | Equal to 💌 | | | | |
| Signature: | Signature | 合直 | | NOK | | | | |
| New Page - 2 | | 43 | | NOK | | | | |
| | | | | | | Ad | d Rule | • |

• Select the step referenced in the "When the answer to" dropdown.

Note: This dropdown will list all steps defined above the step/page with the defined visibility rule.

| 0 - I - I - O - I4 T I - I | | | A | ✓ Step Settings | | | |
|-------------------------------|-----------------|--------|----------|---|---|---|--|
| Cold Salt Tank I | orm | | | Answer type Show Pop Up Message | | | |
| New Page | | 42 | | Snow Pop Up message | | | |
| Level | Number | \$ € ± | | Message to show | | | |
| Hot Water Flow In | Number | 合前 | | Please Contact Supervisor. | | | |
| Hot Water Flow Out | Number | 合命 | | | | | |
| Cold Water Flow In | Number | 合命 | | | | | |
| Cold Water Flow Out | Number | 合血 | | ✓ Step Visibility Rules | | | |
| Tempering Valve | Yes/No | 4 4 8 | | | | | |
| Please Contact Supervisor. | Show Message | · 4 i | | Show this Step When Any of the following Rules match | ~ | | |
| Pump Flow | Number | 合意 | | When the answer to | | | |
| Botton Temperature | Number | 合命 | | Tempering Valve | • | ŵ | |
| Take a Picture | Take picture | 合命 | | Equal to 👻 🖌 | | | |
| Signature: | Signature | 4 🖻 | | NOK | | | |
| New Page - 2 | | 6 | | Ť | | | |





 Select the logical condition and enter the corresponding values to define when the step/page will display. Note that the criteria will update based upon the selected step type for "When the Answer to" is selected. Various options will be available based upon pointing to a numeric, list, yes/no, or other step types.

| Form Designer Cold Salt Tank Form v 0.00 | (2 Pages, 23 Steps , ● \ | sibility Default Checkist1) | \bigcirc | B | 0 | × |
|--|--------------------------|----------------------------------|------------|---|----|---|
| New Page New Step | | ✓ Step Settings | | | | |
| Cold Salt Tank Form | A | Answer type | | | | |
| ∧ New Page | 42 | Show Pop Up Message 🛛 🔻 | | | | |
| Level Number | \$ 42 € | Message to show | | | | |
| Hot Water Flow In Number | 合金 | Please Contact Supervisor. | | | | |
| Hot Water Flow Out Number | ● 4 ÷ | | | | 11 | |
| Cold Water Flow In Number | ● La L | | | | | |
| Cold Water Flow Out Number | ● 4 8 | ✓ Step Visibility Rules | | | | |
| Tempering Valve Yes/No | \2 42 @ ● | Show this Step When | | | | |
| Please Contact Show Supervisor. Message | · Ci i | Any of the following Rules match | | | | |
| Pump Flow Number | 42 億 | When the answer to | | Â | | |
| Botton Temperature Number | 42 億 | Tempering Valve | | ш | | |
| Take a Picture Take picture | 41 亩 | Equal to 🖤 | | | | |
| Signature: Signature | 合金 | NOK 👻 | | | | |
| ✓ New Page - 2 | රු | | | | | |
| | | When the answer to | | | | |
| | | Cold Water Flow Out | | ŵ | | |
| | | Is Between 💌 | | | | |
| | | 0 and 49.99 | | | | |
| | * | | | | | |

If there is a Visibility rule on a Page, a line will be displayed indicating the dependency.

| m Designer Cold Salt Tai | nk Form v. 0.00 (2 | Pages, 23 St | eps , 👁 Vi | sibility | / Default Checkist1) | ٢ | B | ۲ | × |
|-------------------------------|--------------------|----------------|------------|----------|----------------------------|---|-----|------|---|
| New Page New Step | | | | ~ | Page Settings | | | | |
| Cold Salt Tank F | orm | | ^ | Pa | nge Title | | | | |
| ∧ New Page | | 42 | | | New Page - 2 | | | | |
| Level | Number | \heta 42 to 12 | | | | | | | • |
| Hot Water Flow In | Number | 合金 | | Sn | now Page Title 🔲 | | | | |
| Hot Water Flow Out | Number | · 4 î | | ~ | Page Visibility Rules | | | | |
| Cold Water Flow In | Number | @ f2 i | 1 | | | | | | |
| Cold Water Flow Out | Number | @ 4 û | - | Sh | Any of the following Rules | | | | |
| Tempering Valve | Yes/No | \2 42 û © | L | | | | | | |
| Please Contact Supervisor. | Show Message | @ (2) ii | | w | /hen the answer to | | | | |
| Pump Flow | Number | 合前 | | | Tempering Valve | | 童 | | |
| Botton Temperature | Number | 合金 | | | Equal to 💌 NOk | | | | r |
| Take a Picture | Take picture | 合合 | | | Add Rule to Previous Step | | Add | Rule | d |
| Signature: | Signature | 台前 | | | | | _ | _ | |
| New Page - 2 | -i | • f2 | | | | | | | |





Another type of dependency line will be shown if there is a Previous Step, it will be shown with a green line on the left side.

| Form Designer Cold Salt Tan | k Form ∞ 0.00 (2 | Pages, 23 S | teps , 👁 | fisibility Default Checkist1) | \bigcirc | B | ۲ | × |
|-------------------------------|------------------|----------------|----------|----------------------------------|------------|----------|------|----|
| New Page New Step | New Step w | ith Visibility | • | ✓ Step Settings | | | | |
| Cold Salt Tank Fo | rm | | ^ | Answer type | | | | |
| ∧ New Page | | 2 | | Previous 💌 | | | | |
| Level | Number | ~ ~ ~ ~ | | Step Text (386 Left) | | | | |
| Hot Water Flow In | Number | 42 前 | | Previous Level | | | | |
| Hot Water Flow Out | Number | · · · · · · | | | | | // | |
| Cold Water Flow In | Number | @ 4 <u>1</u> Ē | ווי | Step Note (400 Left) | | | | |
| Cold Water Flow Out | Number | • 4 i | וו | Enter Step Note | | | // | |
| Tempering Valve | Yes/No | _ 41 @ ● | J | Select a Step | | | | |
| Please Contact Supervisor. | Show Message | @ 4 î | | Level | | | | |
| Pump Flow | Number | 41 亩 | | | | | | |
| Botton Temperature | Number | 42 B | - 1 | ✓ Step Triggers | | | | |
| Take a Picture | Take picture | 合自 | | | | Add trig | gger | ĺ. |
| Signature: | Signature | 合首 | - 1 | Otra Maikilla Dular | | | | |
| New Page - 2 | 1 | • 4 | | ✓ Step Visibility Rules | | | | |
| Previous Level | Previous | 42 亩 | | Show this Step When | | | | |
| Level | Number | \$ € ± | | Any of the following Rules match | | | | |
| Hot Water Flow In | Number | 合音 | | | - 1 | Add I | Rule | |
| Hot Water Flow Out | Number | · 4 i | | | | | | |
| Cold Water Flow In | Number | ● 4 前 | - T | | | | | |

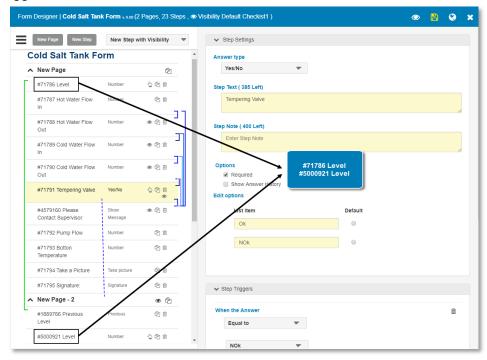
• Additional options for the form are available by moving the mouse over \blacksquare the options icon.





| Form Designer Cold Salt Tank | Form v. 0.00 (2 | Pages, 23 Sl | leps , 👁 | sibility Default Checkist1) | Ő | B | ۲ | × |
|--|-----------------|---|----------|----------------------------------|---|----------|------|---|
| New Page New Step | New Step w | ith Visibility | • | ✓ Step Settings | | | | |
| Show Step IDs | | | * | Answer type | | | | |
| Show Dependency Lines Remember List Options | | ረግ | - 1 | Previous 💌 | | | | |
| Default Visibility Visibility Default Ch | eckist1 🔻 | _ | - 1 | Step Text (386 Left) | | | | |
| Default Step Type Short Text | • | 42 f2 🗇 | - 1 | Previous Level | | | | |
| Hot water Flow In | Number | 合首 | 11 | | | | 1 | |
| Hot Water Flow Out | Number | · 4 û | | Step Note (400 Left) | | | | |
| Cold Water Flow In | Number | ● 삼 前 | _ | Enter Step Note | | | | |
| Cold Water Flow Out | Number | * f2 û | 1 - 1 | | | | 1 | |
| Tempering Valve | Yes/No | 습 선 8 ** | | Select a Step | | | | |
| Please Contact Supervisor. | Show Message | ● 4 m² | ш | Level | | | | |
| Pump Flow | Number | 合命 | | ✓ Step Triggers | | | | |
| Botton Temperature | Number | 合命 | | • Step Higgets | | | | |
| Take a Picture | Take picture | 合面 | | | | Add trig | jger | |
| Signature: | Signature | 合言 | - 1 | | | | | |
| New Page - 2 | | • | | ✓ Step Visibility Rules | | | | |
| Previous Level | Previous | 企會 | | Show this Step When | | | | |
| Level | Number | 수 관 · · · · · · · · · · · · · · · · · · | | Any of the following Rules match | | | | |
| Hot Water Flow In | Number | 合首 | | | | Add I | Rule | |
| Hot Water Flow Out | Number | • 4 i | | | | | | |
| Cold Water Flow In | Number | · 2 i | - | | | | | |

 Show Step IDs – Displays the unique ID of each Step question to identify Step questions that contain the same Step Text in cases of validation messages, configure visibility rules, and triggers.







• Show Dependency Lines - Each element configured with visibility rules, Picture Triggers or Previous Step will show a line with the dependency. To hide the dependency lines, uncheck the option "Show Dependency Lines".

| m Designer Cold Salt Ta | ink Form v. 0.00 (2 | 2 Pages, 23 St | eps , 👁 \ | /isibility Default Checkist1) | 0 | B | 0 |
|--|---------------------|--------------------|-----------|----------------------------------|---|---------|------|
| New Page New Step | New Step v | vith Visibility | • | ✓ Step Settings | | | |
| Cold Salt Tank F | orm | | ^ | Answer type | | | |
| New Page | | ළ | | Previous 🐨 | | | |
| #71786 Level | Number | 습 관 s | | Step Text (386 Left) | | | |
| #71787 Hot Water Flow In | Number | ළු ම | | Previous Level | | | |
| #71788 Hot Water Flow Out | Number | @ (2) B | 1 | Step Note (400 L et) Dependency | | | |
| #71789 Cold Water Flow In | Number | * < i | | Lines | | | |
| #71790 Cold Water Flow Out | Number | · 2 8 | | Select a Step #71786 Level | | | |
| #71791 Tempering Valve | Yes/No | 상 산 음 @ | | | | | |
| #4579160 Please Contact Supervisor. | Show De Message | ependency Lines | | ✓ Step Triggers | | | |
| #71792 Pump Flow | Number | 合言 | | | | Add tri | gger |
| #71793 Botton Temperature | Number | 2 前 | | ✓ Step Visibility Rules | | | |
| #71 Dependency Lines | Take picture | 4 8 | | Show this Step When | | | |
| ##1/95 Signature: | Signature | ළු ම | | Any of the following Rules match | | | |
| New Page - 2 | | @ f2 | | | | Add I | Dule |
| #1889766 Previous Level | Previous | 合言 | | | | Add | kule |
| #5000921 Level | Number | <u>ଧ୍ୟ</u> ଛ | | | | | |

• **Remember List Options -** When you add a new Yes/No or List Step Question, it will remember the list options (Radio, Dropdown and Checkbox).

| Form Designer Cold Salt Tar | nk Form v. 0.00 (2 | 2 Pages, 23 St | eps , 👁 | Visibility Default Checkist1) | | 👁 💾 🥹 🗙 |
|--|--------------------|-----------------|---------|--|---------|--------------------------|
| New Page New Step | New Step v | vith Visibility | • | ✓ Step Settings | | |
| Cold Salt Tank Fo | orm | | - | Answer type | | |
| New Page | | 62 | | Yes/No 💌 | | |
| #71786 Level | Number | 습 4 <u>2</u> 亩 | | Step Text (385 Left) | | |
| #71787 Hot Water Flow In | Number | 4 8 | | Tempering Valve | | ĥ |
| #71788 Hot Water Flow Out | Number | * 4 i | 1 | Step Note (400 Left) Enter Step Note | | |
| #71789 Cold Water Flow In | Number | ● 4 û | | | | li li |
| #71790 Cold Water Flow Out | Number | ۲ <u>)</u> ۲ | 1 -n | Options | | Remember List Options |
| #71791 Tempering Valve | Yes/No | \2418 ● | 1 | Edit options | | |
| #4579160 Please Contact Supervisor. | Show Message | @ (1) İ | | List Item Ok | Default | |
| #71792 Pump Flow | Number | 合直 | | NOK | | |
| #71793 Botton Temperature | Number | 41 亩 | | | | |
| #71794 Take a Picture | Take picture | 合金 | | | | |
| #71795 Signature: | Signature | 白田 | | ✓ Step Triggers | | |
| ∧ New Page - 2 | 1 | ۰ t | | When the Answer | | â |
| #1889766 Previous Level | Previous | 4 前 | | Equal to 💌 | | |
| #5000921 Level | Number | 순 선 @ | • | NOk 💌 | | |

Default Step Type - The user can select which step type will be used when adding a New Step





| Form Design | er Cold Salt Tank | : Form v. 0.00 |) (2 Pages, 23 Ste | eps , 👁 Visi | ibility De | fault Checkist1) | | | ٢ | B | ۲ | × |
|---|--|------------------------------|--|--------------|--------------------------------------|--|---|---------|---|---|----------|---|
| New Pa | ige New Step | New Step | with Visibility | • | ♥ Ste | ep Settings | | | | | | |
| Default Step T #/178 In #7178 Out | Idency Lines List Options V Visibility Default Cr ype Short Text (Short Text (Mindt-Line Text Mumber List St Vervious Lookup 9 Cc Date Show Message Show Document Cas Can Code C | lumber lumber | Default Step Type 안 음 • 안 음 • 안 음 • 안 음 | | Step T Te Step N E Optio | es/No Fext (385 Left) Empering Valve Note (400 Left) Enter Step Note | • | | | | li li | |
| #7179 #4579 | Take picture Drawing Signature Calculation Instructions | l <mark>es/No</mark> Show | _ 42 â ● | | Edit op | List Item | | Default | | | | |
| #7179 | t Supervisor. 2 Pump Flow 3 Botton | Message Number Number | ළු ඔ ළු ඔ | | | Ok NOK | | • | | | | |
| #7179 | 4 Take a Picture 5 Signature: | Take picture Signature | දි ම දි ම | | ♥ Ste | ep Triggers | | | | | | |
| ∧ New I #1889 Level | Page - 2 | Previous | ♥ 42 42 û | | | the Answer Equal to | • | | | | 莭 | |
| #5000 | 921 Level | Number | 습 4월 前 | • | | NOk | | | | | | |

Working with Default Visibility Rules in the Form Designer and Form Tools [Admin, Editor]

Admin or Editor may create a set of Auto-Visibility defaults that can be used when designing Forms. A default Visibility creates a set of visibility rules for one or more response types that define how the visibility should be created when the step is added. When adding a new step the visibility rule will automatically be added without user intervention based upon the settings saved in the Visibility Default template.

For example if a checklist procedure is being created where each step should only appear if the previous step is answered "Completed" (a Yes/No response type with the list items changed to Completed and Not Completed) this rule can be saved as a default and automatically added to each step. Default rules are created in the Form Tools tab. The Auto-Visibility default will be given a name and can be chosen when designing the form. Each default set created will include the visibility settings for any/all step types required. Visibility rules for each response type may be configured to create a default setting that matches how you will use them when creating a form. By setting up the defaults for various response types it enables a single-click addition of the visibility rule. The required visibility rule's step dependency, criteria equation, and the rule values are all entered automatically. This drastically reduces the amount of time required to add multiple steps with the same visibility when designing your form.





Select "Visibility Defaults" Visibility Defaults
 on Forms Tools

| | | | | | _ |
|-------|---|---------------------|----------|--------|------|
| New [| locument New Lookup Visibility Defaults 💟 Documents 🗹 Lookups 🗹 Visibility Defaults | | | Q, Sea | arch |
| | Name | Туре | Forms | | |
| | A Search | Q Search | Q Search | | |
| 8 | Asset Picture | Document | 0 | ළු | 5 |
| 8 | MUSC | Document | 1 | ත | 5 |
| 8 | Pump Changeover Diagram | Document | 2 | ත | 5 |
| 8 | SOP | Document | 0 | ත | 5 |
| 8 | Employee Name | Lookup Tool | 2 | ත | 5 |
| 8 | lookup table | Lookup Tool | 0 | ත | 5 |
| 8 | Visibility_Default (Section 1) | Visibility Defaults | 0 | ත | 5 |
| 8 | Visibility Default (Section 2) | Visibility Defaults | 0 | ත | 5 |

• The Visibility Default Manager window appears. Storage Groups are displayed in Blue on the left side of the screen. Storage Group list on the left allows you to see any Default Visibility in your storage group or below.

| Visibility Default Manager | × |
|---|---|
| Select a Storage Group | Select Default Visibility |
| Q. Search Visibility Defaults ★ QA. Helico Solar Plant / North Side | Add New Visibility Default Checkist1 Visibility Default Checkist2 |
| 👁 QA Helios Solar Plant | 0 |

 Available Default Visibility templates for selected Storage Groups are show on the right with the 'Add New' or Delete in options in the list. Select Add New Default Visibility:





| Visibility Default Manager | | | × |
|--|---|---|--------|
| Select a Storage Group | | Select Default Visibility | |
| Q Search Visibility Defaults QA Helios Solar Plant, North Side QA Helios Solar Plant, A North Side QA Helios Solar Plant, I Kest Side QA Helios Solar Plant, I West Side | × | wdiability Default Checkist1 Visibility Default Checkist2 | ů ů |
| 👁 QA Helios Solar Plant | | | 0 |

• At the top, Default Visibility can be added for this Storage Group. To create a new Default Visibility, simply enter both the Default Name and optionally a Default Description. Press the blue "Add Default" button to add the Default Visibility.

| Visibility | Default Manager | | | : |
|-------------|-------------------------------|---|--|-------------|
| 🗩 QA Helio | os Solar Plant | | | • |
| Add Default | Available Defaults Add New | New Default Name Visibility Default Checklist2 | New Default Description Description Visibility Default | Add Default |
| | | | ```` | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

• Click "Add Default" button, the lower part of the screen is filled with available Defaults.





| ibility Default Manager | | | | | |
|---|--|---------------------|--|-------------------|---------------------------|
| Helios Solar Plant / Visil | oility Default Checklist3 - De | scription Visibilit | y Default | | Added |
| Available Defaults Default <mark>Visibility Default Check</mark> | New Default N list3 Visibility Defa | | New Default Descript Description Visibility | | - |
| ailable Response Types | | | Visibility: Used in V | isibility rules | |
| esponse Type | Condition Name | | String Test Value | Number Test Value | Date Test Value (Local) |
| Search Response Type | X Search Condition Name | × | YES | -6 | 2019-11-12T12:47:09-06:00 |
| Select Default Source | | * | | | |
| Visibility | | • | | | |
| Short Text | Answered | e - | | | |
| Short Text | Equal to | e | | | |
| Short Text | Not equal to | e | | | |
| Short Text | Contains | e | | | |
| Short Text | Does Not Contain | e | | | |
| Multi-Line Text | Answered | ~ | | | |
| Multi-Line Text | Equal to | e | | | |
| Multi-Line Text | Not equal to | e | | | |
| Multi-Line Text | Contains | e - | | | |
| Multi-Line Text | Does Not Contain | e + | | | |
| Number | Answered | e - | | | |
| Number | Equal to | ~ | | | |
| Number | Not equal to | ~ | | | |
| Number | Less than | e | | | |
| Number | Less than or equal to | ~ | | | |
| | | - | | | |

Note: Default name MUST be unique with each Storage Group.

• From the 'Available Defaults' dropdown list the user can switch to any other Defaults within the selected Storage Group.

| QA Helios Solar Plant / Visibili | y Default Checkist1 | | | | |
|--|-------------------------|----------|-----------------------|-------------------|---------------------------|
| Available Defaults Visibility Default Checkist1 #Add New Visibility Default Checkist1 Visibility Default Checkist1 Visibility Default Checkist1 Visibility Default Checkist1 | 2 (m | | New Default Descripti | | - |
| Response Type | Condition Name | | String Test Value | Number Test Value | Date Test Value (Local) |
| Q Search Response Type | X Search Condition Name | × | YES | -6 | 2019-11-12T12:47:09-06:00 |
| Select Default Source Visibility Short Text | Answered | • | Number/Answered | | |
| Short Text | Equal to | ~ | Number/Is Betwee | | |
| Short Text | Not equal to | * | Is Between 0 | and 49.99 | |
| Short Text | Contains | e - | Yes/No/Answered | (Radio) | |
| Short Text | Does Not Contain | e - | Answered | | |
| Multi-Line Text | Answered | ~ | Yes/No/Equal to (R | adio) | |
| Multi-Line Text | Equal to | e | Equal to NOk | | |
| Multi-Line Text | Not equal to | e | Yes/No/Equal to (R | adio) | |
| Multi-Line Text | Contains | e - | Equal to NOk | | |
| Multi-Line Text | Does Not Contain | ~ | | | |
| Number | Answered | ~ | | | |
| Number | Equal to | e - | | | |
| Number | Not equal to | · | | | |
| Number | Less than | ~ | | | |
| Number | Less than or equal to | e - | | | |

• User can update the Name or the Description. Changes will be auto saved after 1.5 seconds.





| QA Helio | os Solar Plant / Visibility I | efault Cheo | :kist1 | | | | Updated | |
|-----------|--|-----------------|--|---------------|-------------------------|-------------------|---------------------------|---|
| d Default | Available Defaults Visibility Default Checkist1 RAI | NAME V | New Default Name Visibility Default Che | ckist1 RANAME | New Default Description | | | |
| vailable | Response Types | | | | Visibility: Used in Vis | sibility rules | | |
| Response | e Type | Conditio | n Name | | String Test Value | Number Test Value | Date Test Value (Local) | |
| Q Search | Response Type | Q Search | Condition Name | × | YES | -6 | 2019-11-12T12:47:09-06:00 | |
| Select D | Default Source | | | • | Number/Answered | | | Ê |
| Short Te | | Answere | d | ~ | Answered | | | |
| Short Te | ext | Equal to | | e | Number/Is Between | | | Ű |
| Short Te | ext | Not equa | il to | ~ | Is Between 0 | and 49.99 | | |
| Short Te | ext | Contains | | e - | Yes/No/Answered (| Radio) | | Û |
| Short Te | xt | Does No | t Contain | e | Answered | | | |
| Multi-Lir | ne Text | Answere | d | ~ | Yes/No/Equal to (Ra | adio) | | ť |
| Multi-Lir | ne Text | Equal to | | e | Equal to NOk | | | |
| Multi-Lir | ne Text | Not equa | il to | e | Yes/No/Equal to (Ra | adio) | | f |
| Multi-Lir | ne Text | Contains | | ← | Equal to NOk | | | |
| Multi-Lir | ne Text | Does No | t Contain | ← | ,, | | | |
| Number | | Answere | d | ← | | | | |
| Number | | Equal to | | e | | | | |
| Number | | Not equa | | ← | | | | |
| Number | | Less thar | | e | | | | |
| Number | | Less than | n or equal to | e - | | | | |

• Available Response Types: This area shows the Response types that are available for assignment to Default Visibility.

| | bility Default Checklist3 - Desc | | | | |
|------------------------------------|----------------------------------|------------|------------------------|-------------------|---------------------------|
| Available Defaults | New Default Na | | New Default Descript | | |
| I Default Visibility Default Check | dist3 • Visibility Default | Checklist3 | Description Visibility | Default | |
| vailable Response Types | / | | Visibility: Used in \ | /isibility rules | |
| Response Type | Condition Name | | String Test Value | Number Test Value | Date Test Value (Local) |
| Q Search Response Type | X Search Condition Name | × | YES | -6 | 2019-11-12T12:47:09-06:00 |
| Select Default Source | | | | | |
| Visibility | | • | | | |
| Short Text | Answered | e - | | | |
| Short Text | Equal to | e | | | |
| Short Text | Not equal to | e | | | |
| Short Text | Contains | e - | | | |
| Short Text | Does Not Contain | e | | | |
| Multi-Line Text | Answered | ~ | | | |
| Multi-Line Text | Equal to | e | | | |
| Multi-Line Text | Not equal to | e | | | |
| Multi-Line Text | Contains | e | | | |
| Multi-Line Text | Does Not Contain | e | | | |
| Number | Answered | e | | | |
| Number | Equal to | e | | | |
| Number | Not equal to | e | | | |
| Number | Less than | 0 | | | |
| Number | Less than or equal to | e | | | |
| kiron kan | | · · | | | |

 Search windows are available to quickly locate Response Type and Condition Name. Add new Default Visibility by clicking the "Right Arrow"
will add that condition to the right side.





| A Helios Solar Plant / Visibi | ility Default Checklist3 - Desc | ription Visibil | ity Default | | |
|--|--|---------------------------------------|--|-------------------|---------------------------|
| Available Defaults Default Visibility Default Checkli | New Default Na st3 Visibility Default | | New Default Descript Description Visibility | | - |
| ailable Response Types | | | Visibility: Used in V | /isibility rules | |
| esponse Type | Condition Name | | String Test Value | Number Test Value | Date Test Value (Local) |
| Search Response Type | X Search Condition Name | × | YES | -6 | 2019-11-12T12:47:09-06:00 |
| elect Default Source | | - | -Short Text/Answe | red | |
| Visibility | | • | Answered | | |
| hort Text | Answered | \$ | | | |
| hort Text | Equal to | e e e e e e e e e e e e e e e e e e e | | | |
| hort Text | Not equal to | e - | | | |
| hort Text | Contains | e - | | | |
| hort Text | Does Not Contain | e | | | |
| Aulti-Line Text | Answered | e | | | |
| fulti-Line Text | Equal to | e | | | |
| fulti-Line Text | Not equal to | e | | | |
| fulti-Line Text | Contains | e | | | |
| fulti-Line Text | Does Not Contain | e | | | |
| lumber | Answered | e | | | |
| lumber | Equal to | e | | | |
| lumber | Not equal to | ~ | | | |
| lumber | Less than | ~ | | | |
| lumber | Less than or equal to | ~ | | | |
| to and the set | | - | | | |

• The list to the right contains any default values that the user has added to this visibility default list. At the top are 3 text boxes used for 'testing' conditions. Each default value will use the test box based on its type. ex 'Short Text' uses 'String Test Value', Number uses 'Number Test Value' etc.

| Available Defaults Default Visibility Default Checkis | New Default Nam | | New Default Descripti | | _ |
|---|------------------------------|------------------|------------------------|-------------------|---------------------------|
| Visibility Default Checkis | t1 RANAME Visibility Default | Checkist1 RANAME | VR Default description | n RENAME | |
| ailable Response Types | | | Visibility: Used in V | isibility rules | Test Conditions |
| esponse Type | Condition Name | | String Test Value | Number Test Value | Date Test Value (Local) |
| Search Response Type | 🗙 🔍 Search Condition Name | × | Test | 9 | 2019-11-12T12:47:09-06:00 |
| Number | Equal to | et 🗧 | Number/Equal to | | |
| Number | Not equal to | ~ | Equal to 4 | | |
| Number | Less than | ~ | | | |
| Number | Less than or equal to | ~ | Number/Greater t | han | |
| Number | Greater than | e - | Greater than 6 | | |
| Number | Greater than or equal to | ~ | | | |
| Number | Is Between | e - | | | |
| Number | Is Not Between | ~ | | | |
| List | Answered | ~ | | | |
| List | Equal to | ~ | | | |
| List | Not equal to | e - | | | |
| Yes/No - Radio | Answered | e - | | | |
| Yes/No - Radio | Equal to | e - | | | |
| Yes/No - Radio | Not equal to | e + | | | |
| Lookup | Answered | e+ | | | |
| Lookup | Equal to | ~ | | | |
| Lookup | Not equal to | ~ | | | |

Note: The background color of each condition will change according to if the local validation passes or fails.



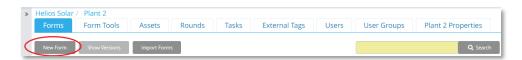


The example above is a number step, it tests against the 'Number Test Value'. Since 9 does not equal 4, the first condition is yellow (fail). Since 9 is greater than 6, the second condition is green (success). This is just a helper function and does NOT affect saving the Default Visibility.

| | | | | iption RENAME | | |
|---|--------------|--------------------------|------------------------|-------------------------|-------------------|---------------------------|
| Available Defaults Default Visibility Default Che | eckist1 RANA | New Default Nam | ne Checkist1 RANAME | New Default Description | | |
| ailable Response Types | | | | Visibility: Used in Vi | sibility rules | |
| esponse Type | | Condition Name | | String Test Value | Number Test Value | Date Test Value (Local) |
| Search Response Type | × | Q Search Condition Name | × | Test | 9 | 2019-11-12T12:47:09-06:00 |
| Number | | Equal to | e - | Number/Equal to | | |
| Number | | Not equal to | + | Equal to 4 | | Fail |
| Number | | Less than | e | | | |
| Number | | Less than or equal to | e | Number/Greater th | han | Pass |
| Number | | Greater than | e - | Greater than 6 | | |
| Number | | Greater than or equal to | e - | | | |
| Number | | Is Between | e - | | | |
| Number | | Is Not Between | e - | | | |
| List | | Answered | e - | | | |
| List | | Equal to | e - | | | |
| List | | Not equal to | e | | | |
| Yes/No - Radio | | Answered | e | | | |
| Yes/No - Radio | | Equal to | e | | | |
| Yes/No - Radio | | Not equal to | e | | | |
| Lookup | | Answered | ~ | | | |
| Lookup | | Equal to | e | | | |
| Lookup | | Not equal to | A | | | |

Note: when you type in a value into any condition, it will be auto saved after 1.5 seconds, you can delete a condition clicking on the delete \mathbf{m} icon. The 3 test values are stored locally and will reload when the user navigates back to this page.

• To create a Form using Default Visibility Rules, Select "New Form" on Forms Designer.



• Mouse over Form Settings icon = and select a Default Visibility from the dropdown list.





| Form Designer New Form1574089668984 * (1 Pages, 0 Steps, @ | Visibility Default Checkist1 RANAME - VR Default description RENAME) | 🖹 🥹 🗙 |
|--|---|-------------|
| New Page New Step | ✓ Form Settings | |
| Show Step IDs | Form Name | |
| | New Form1574089668984 | |
| Default Step Typ @Add New Visibility Default Checkist1 RANAME | Description Enter Form Description | |
| Visibility Default Checklist2 Visibility Default Checklist3 | | h |
| | Additional Information Status | Unpublished |
| | Associated Assets | 0 |
| | Tasks using this Form | 0 |
| | Report based on this Form | 0 |
| | Version | 0.0.0 |
| | Version Tracking Log Name: New Form1574089668984 Show All | |
| | Version-Serial-Status User Type Date | Log |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

Note: "Visibility Default Checklist2" has 5 associated rules.

| Form Designer New Form1574089668984 v. 0.00 (1 Page | s, 0 Steps , 👁 Visibility D | efault Checkist1 RANAME | - VR Default description RE | NAME) | f | - 8 | ۲ | × | |
|---|---|-------------------------|-----------------------------|--------|---|-----|----------|---|--|
| New Page New Step | ✓ Form S | Settings | | | | | | | |
| Show Step IDs | Form Nan | ne | | | | | | | |
| Show Dependency Lines Remember List Options | New | Form1574089668984 | | | | | | | |
| Default Visibility Visibility Default Checkist1 RANAME Default Step Typ Add New Visibility Default Checkist1 RANAME Visibility Default Checkist3 Visibility Default Checkist3 | Descriptio | r Form Description | | | View From Visibility Default Manager | | | | |
| | String Test Value | | | | | | | | |
| | Test | 9 | 2019-11-12T12:47:09-06:00 | | | Unp | ublished | | |
| | Short Text/Answered Answered | | | | Ê | | | | |
| | | | | | | | | | |
| | Number/Answered | l . | | Û | | | 0 | | |
| | Answered Yes/No/Answered Answered | Answered (Radio) | | | ŵ | | 0.0.0 | | |
| | Yes/No/Equal to (F | Radio) | | Û | Date | Log | | | |
| | Yes/No/Equal to (F Equal to NOk | Radio) | | Û | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

• Click on "New Step"





| Fo | rm Designer New Form1574 | 4089668984 v. o. | ∞ (1 Pages, 1 | Steps , | 👁 Visi | bility Default Checklist2) | ٢ | B | 0 | × |
|----|----------------------------|------------------|---------------|---------|--------|--|---|----------|------|---|
| = | New Page New Step | New Step wit | h Visibility | - | ~ | Step Settings | | | | |
| | New Form1574089 | 9668984 | | ^ | An | iswer type | | | | |
| | ∧ New Page | | 42 | | | Short Text 💌 | | | | |
| | #1143626 New Step - 1 | Short Text | ළු ම | | Ste | ep Text (388 Left) | | | | |
| | | | | | | New Step - 1 | | | | |
| | | | | | | | | | 11 | |
| | | | | | Ste | ap Note (400 Left) | | | | |
| | | | | | | Enter Step Note | | | | |
| | | | | | | | | | - 11 | |
| | | | | | 0 | ptions Required | | | | |
| | | | | | | Show Answer History | | | | |
| | | | | | En | ter Default answer | | | | |
| | | | | | | Enter Default Answer | | | | |
| | | | | | | | | | | |
| | | | | | ~ | Step Triggers | | | | |
| | | | | | | | | Add trig | gger | |
| | | | | | ~ | Step Visibility Rules | | | | |
| | | | | | Fir | st step element can not have visibility rule | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | Ŧ | | | | | | |

Note: "New Step with Visibility" drop down appears. It will try to match any existing defaults visibility with the current step type and display them in the drop down and the top of the Form Designer will show which Visibility Default is currently selected.

By "clicking" on the Default Visibility name in the Form Designer header it will open the editor with the selected default allowing the user to edit a default.

| New Page New Step | New Step | with Visibility | - | Short Text | - | | | | | | |
|-----------------------|------------|-----------------|---|--|--|---|--|--|-----------------------|---|----|
| New Form157408 | 39668984 | | * | Step Text (388 Left) | \backslash | | | | . 1 | | |
| ∧ New Page | | ළු | | New Step - 2 | \mathbf{X} | | | | | | |
| #71905 New Step - 1 | Short Text | 19 B | | Step Note (400 Left) | \setminus | | | | | | |
| #2175665 New Step - 2 | Short Text | ♥ Cl 8 | | Enter Step Note | | | | | | | |
| | | | | | | | | | | | |
| | | | | Enter Default Answer | And Default Visibility Default Checking | New Default Name Kobility Default Chec | | ull Description | | - | |
| | | | | | | | 14912 | ut Description | rules | - | |
| | | | | Enter Default Answer | Ani Datait Visibility Default Checklog Available Response Types Response Type | Kobilty Default Cher Centilien Name | Visibility String Test | r: Used in Visibility | Number Test Valu | e Date Test Value (Local) | |
| | | | | Enter Default Answer | Ani Initial Visibility Default Checklost Available: Response Types Response Type 9, death Response Type | Mobility Default Cher | Visibility Notice | r: Used in Visibility t Value | Number Test Valu | e Date Test Value (Local) 2010-11-127 12 47 (0-06 00 | 10 |
| | | | | Enter Default Answer | Ani Datait Visibility Default Checklog Available Response Types Response Type | Kobilty Default Cher Centilien Name | Visibility Bring Text Ited Short Te | r: Used in Visibility Nature | Number Test Valu | | 10 |
| | | | | Enter Default Answer | Ant Detait Vebally Detait Checkled Available Response Types Response Type & Genetic Response Type X Select Default Source | Kobilty Default Cher Centilien Name | Visibility Kring Test Short Te Assured | r: Used in Visibility t Value ext/Answered | Number Test Valu | | 10 |
| | | | | Enter Default Answer | Aus Deter Vessely between Checkson Available Response Types Response Type G. dottal: Response Type Exect Data/I Source Scient Data/I Source Scient Data/I Source Scient Data/I Source | Kobity Detail Cher Cenetitien Name Gash Condition Name Answerd Equal to | Visibility Kring Test Itest Short Te Assessed Namber | r: Used in Visibility t Value I ext/Answered t t/Answered | Number Test Valu | | 10 |
| | | | | Enter Default Answer | Aust Install Vestally Declarat Calcoloci Available Response Types Response Type G. Annus Requires Type Response Type Calcolocit Requires Type Calcolocit Requires Calcology Calcolocit Res Response Type Calcolocit Res Response Type Calcolocit Response Type Calcolocit Respo | Kobity Debut Che Centilion Hans G. Secol Control Name Answed Example Net opail to | Visibility Reng Swi ftor Short T Answert Number | r: Used in Visibility t Value | Number Test Valu 9 | | 0 |
| | | | | Step Visibility Rules | Ana Ineliai Vesally becan Checked Available Response Types Response Type Response Type Response Type Response Type Response Respo | Kobiny Default Che Constituen Name Gobiner Name Antoneed Found to Nor equal to Comman | X Voibility Reing the Inot Short Te Answere Vashfal | r: Used in Visibility Nate exciAnswered r/Answered / /Answered (Radio | Number Test Valu 9 | | 20 |
| | | | | Enter Default Answer Step Triggers Step Visibility Rules show this Step When | Ana Ineliai yeekki berant Canceler Available Response Type Advantable Response Type Advanta Response Type Advanta Sector Sec Sector Man Tec Sector Se | Kobiny Debut One Condition Name Answed Power to Condition Name Answed Power to Condition Name Desugnatio Condition Name Desugnatio Condition Name Desugnatio Condition | Visibility Reing Beach Ited Short Tr Asseme Yessibal Asseme | r: Used in Visibility Nate exciAnswered r/Answered / /Answered (Radio | Number Test Valu 9 | | 10 |
| | | | | Step Visibility Rules | Ana Ineliai Vesally becan Checked Available Response Types Response Type Response Type Response Type Response Type Response Respo | Kobiny Default Che Constituen Name Gobiner Name Antoneed Found to Nor equal to Comman | Visibility Breng ber How How Namber Asseme | r: Used in Visibility Nate 1 ext:/Answered r:/Answered r /Answered (Radio //Equal to (Radio) | Number Test Valu 9 | | 10 |
| | | | | Enter Default Answer Step Triggers Step Visibility Rules show this Step When | And Dahar (weakly Central Theorem Available Response Types Available Response Type Available Response Type Reset Data How Boot The Boot The | Kobiny Default Che Condition Name Genetico Name Assemd Fourito Net counter Contrain Contrain Contrain Contrain Assempt | Voibility Reng Set Ind Short To Answere Narbe Yeshbi Sagaro | r: Used in Visibility Nate 1 ext:/Answered r:/Answered r /Answered (Radio //Equal to (Radio) | Number Test Valu 9 | | 20 |
| | | | | Enter Default Answer Enter Default Answer Step Yrappro Step Vhabity Rules Show this Step When Any of the following Rule | Ant their westly School Theorem Analable Response Types Response Type Classification Type Response T | Kobiny Detaut One Condition Name Genetics Name Genetics Name Answerd Answerd Power to Condition Name Contains Construit | X Volubility X Volubility Reng bet Sanse Assess Asses Asses Assess Asses Ass | r: Used in Visibility I Yate I est/Anowered I If/Anowered (Radio) I Equal to (Radio) Ou I/Equal to (Radio) | Number Test Valu 9 | | 20 |
| | | | | Enter Default Answer Step Triggers Step Visibility Rules Show this Step When Any of the following Rule When the answer to | And tolelly woodly Constitutions Types Available: Response Types Available: Response Type Available: Response Type esponse Type Response Type | Social Charlos Constant Name Constant Name Assemble Constant Name Assemble Constant Name Assemble Constant Name Constant Name Constant X Volkity Reng ter In Skort T Skort Skort T Skort T Skort Skort T Skort Skort T Skort T Skort Skort T Skort Skort T Skort Skort T Skort Skort T Skort T Skort T Skort T Skort Skort T Skort Skort T Skort Skort | r: Used in Visibility I Yate I est/Anowered I If/Anowered (Radio) I Equal to (Radio) Ou I/Equal to (Radio) | Number Test Valu 9 | | 20 |
| | | | | Enter Default Answer Enter Default Answer Step Yrappro Step Vhabity Rules Show this Step When Any of the following Rule | And tolelly Conset (Securit Decessor) Available Response Types Available Response Type esponse Type Response Type | Solidy Charl Dec | X Voltring the line C C C C C C C C C C C C C C C C C C C | r: Used in Visibility I Yate I est/Anowered I If/Anowered (Radio) I Equal to (Radio) Ou I/Equal to (Radio) | Number Test Valu 9 | | 10 |
| | | | | Enter Default Answer Enter Default Answer Step Triggers Show this Step When Any of the following Rul When the answer to #71905 New Step -1 | And toleri Second Second Second Available Response Types Research Second Second Second Second Second Second Second Second Second br>Second | Stabily Selainy S | X Voltativ Reng ter In Short Ta Annere Namber Annere Yeskida Europhi Annere Yeskida Europhi Europhi Annere Yeskida Europhi | r: Used in Visibility I Yate I est/Anowered I If/Anowered (Radio) I Equal to (Radio) Ou I/Equal to (Radio) | Number Test Valu 9 | | 20 |
| | | | | Enter Default Answer Step Triggers Step Visibility Rules Show this Step When Any of the following Rule When the answer to | And tolelly Conset (Securit Decessor) Available Response Types Available Response Type esponse Type Response Type | Solidy Charl Dec | X Voltring the line C C C C C C C C C C C C C C C C C C C | r: Used in Visibility I Yate I est/Anowered I If/Anowered (Radio) I Equal to (Radio) Ou I/Equal to (Radio) | Number Test Valu 9 | | 20 |





• Click on "New Step with Visibility" and select one rule condition.

| Fo | rm Designer New Form1574 | 1089668984 v. o.oo (1 P | ages, 1 Steps , 👁 V | isibility Default (| Checklist2) | | | ٢ | B | ۲ | × |
|----|------------------------------------|---|---------------------|---------------------|----------------------|----------------|--------|---|---------|------|---|
| = | New Page New Step | New Step with Visib | ility 💌 | ✓ Step Settings | | | | | | | |
| | New Form157408 | Short Text/Answered Include Blank Visibility | | Answer type | | | | | | | |
| | New Page | | 2 | Short Text | * | | | | | | |
| | #1143626 New Step - 1 | Short Text | 1 ⁽¹⁾ | Step Text (388 L | .eft) | | | | | | |
| | | | | New Step - 7 | View | rom Visibility | | | | | |
| | Visibility: Used in Visibilit | y rules | | | Defa | ult Manager | | | | (1) | |
| | String Test Value | Number Test Value | Date Test Value (Lo | cal) | 8 | | , , | | | | |
| | Test | 9 | 2019-11-12T12:47:0 | 9-06:00 | | | | | | 11 | |
| | Short Text/Answered | | | Û | | | | | | | |
| | Number/Answered | | | Û | r History er | | | | | | |
| | Yes/No/Answered (Radio Answered | 0) | | Û | nswer | | | | | | |
| | Yes/No/Equal to (Radio) | | | Û | | | | | | | |
| | Equal to Ok | | | | | | | | Add tri | gger | |
| | Yes/No/Equal to (Radio) | | | Û | | | | _ | | | |
| | Equal to NOk | | | | les | | | | | | |
| | | | | | ın not have visibili | ity rule | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |





• The Visibility Rule will be created automatically in the new step added.

| Form Designer New Form1574089668984 + 800 (1 Pages, 2 Steps, | Ó | B | ۲ | × |
|---|---|---------|------|---|
| New Page New Step With Visibility | | | | |
| New Form1574089668984 | | | | |
| New Page ℓ | | | | |
| #71905 New Step - 1 Short Text 役 窗 | | | | |
| #2175665 New Step - 2 Short Text ④ 但 自 工 | | | | |
| Options Required Show Answer History Enter Default Answer Enter Default Answer | | | | |
| ✓ Step Triggers | | | | |
| | | Add tri | gger | |
| ✓ Step Visibility Rules | | | | |
| The visibility rule will be created automatically | | | | |
| When the answer to #71905 New Step - 1 | | â | | |
| Answered 👻 | | | | |

The "Include blank visibility rule" option is used when there is no Rule created for the selected Step question. This button will create a new step and add a blank visibility rule that points to the currently selected step.

| Form Designer New Form157 | 74089668984 v. c | (1 Pages, 3 Step | , Wisibility Default Checklist2) | ٢ | B | ۲ | × |
|-----------------------------|------------------|------------------|---|----|---------|------|---|
| New Page New Step | New Step wit | | Multi-Line Text 🖤 | | | | |
| New Form157408 | Include Blank | Visibility Rule | Step Text (388 Left) | | | | |
| ∧ New Page | | Ċ | New Step - 3 | | | / | |
| #71905 New Step - 1 | Short Text | 4 8 | Step Note (400 Left) | | | | |
| #2175665 New Step - 2 | Short Text | @ f1 8 | Enter Step Note | | | | |
| #9751011 New Step - 3 | Multi-Line Text | 42 前 | | | | | |
| | | | Options ■ Required ■ Show Answer History Number of lines to show 2 3 5 10 Enter Default answer Enter Default Answer ✓ Step Triggers ✓ Step Visibility Rules | | Add tri | gger | |
| | | | Show this Step When Any of the following Rules match | Ad | id Rule | • | |





The user can fill in the visibility rule. When the visibility rule is filled in, the validation will look for a matching visibility default rule. If it can not find one, a new icon + will appear.

| Form Designer New Form157 | 74089668984 🔬 | 0.00 (1 Pages, 4 \$ | Steps , 👁 \ | risibility Default Checklist2) | © 💾 | • | × |
|-----------------------------|-----------------|---------------------|-------------|---|-------|---------|-----|
| New Page New Step | New Step wi | th Visibility | • | New Step - 4 | | | 6 |
| New Form157408 | 9668984 | | | Step Note (400 Left) | | | |
| ∧ New Page | | 62 | | Enter Step Note | | | |
| #71905 New Step - 1 | Short Text | 42 前 | | | | | * |
| #2175665 New Step - 2 | Short Text | · 4 i | | Options | | | |
| #9751011 New Step - 3 | Multi-Line Text | 化自 | | Show Answer History | | | |
| #4975052 New Step - 4 | Short Text | · 4 i | | Enter Default answer | | | |
| | | | | Enter Default Answer | | | |
| | | | | | | | |
| | | | | ✓ Step Triggers | | | 11 |
| | | | | | Add | trigger | |
| | | | | | | | - 1 |
| | | | | ✓ Step Visibility Rules | | | - 1 |
| | | | | Show this Step When | | | |
| | | | | Any of the following Rules match | | | |
| | | | | | 1 | | |
| | | | | When the answer to #9751011 New Step - 3 | (+⊛ ڨ | | |
| | | | | Answered | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | Ac | ld Rule | |
| | | | | | _ | | |

The icon \bullet will allow the user to add this visibility rule condition to the currently selected visibility default, once clicked, the new rule will be added and the icon will go away since there is a condition that matches.

| Form Designer New Form1574089668984 v. 0.00 (1 Pages, 4 Step | ; , ● Visibility Default Checklist2) | o 🗄 | 8 | × |
|--|--------------------------------------|--------|---------|---|
| New Page New Step New Step with Visibility 💌 | New Step - 4 | | | |
| New Form1574089668984 | Step Note (400 Left) | | | |
| ∧ New Page t2 | Enter Step Note | | | |
| #71905 New Step - 1 Short Text 自 自 | Options | | | , |
| #2175665 New Step - 2 Short Text ④ 任 音 | Required | | | |
| #9751011 New Step - 3 Multi-Line Text 🖒 🔒 | Show Answer History | | | |
| #4975052 New Step - 4 Short Text 👁 🖓 😭 | Enter Default Answer | | | |
| | | | | |
| | ✓ Step Triggers | | | |
| | | Add | trigger | |
| | | Aug | algger | |
| | ✓ Ste Equal to | | | |
| | Not equal to | | | |
| | Show Contains | | | |
| | - New Rule Added | | | |
| | When Answered | ŵ | | |
| | Answered | | | |
| | | | | |
| | | | | |
| | | Add Ru | le 🔻 | |
| | | | | _ |





When the user selects the "Condition" drop down, it will show you the normal allowed visibility rule conditions plus any default conditions that exist. In the example case, the user will see the new "Multi-line Text / Answered" condition recently added.

By clicking on the "New Step with Visibility" drop down the user can verify it exists. It will always have the "Include Add Blank Visibility Rule" option, which will create a blank visibility rule and auto select the previous step.

| Form Designer New Form157 | 4089668984 v | 0.00 (1 Pages, 4 S | teps , 👁 | Visibility Default Checklist2) | ٢ | B | ۲ | × |
|-----------------------------|---------------------------------|--------------------|----------|--|----|---------|------|---|
| | | | | Multi-Line Text 💌 | | | | |
| New Page New Step | New Step wi | | | Step Text (388 Left) | | | | |
| New Form157408 | Multi-Line Tex Include Blank | | ^ | New Step - 3 | | | | |
| ∧ New Page | | C | | | | | // | |
| #71905 New Step - 1 | Short Text | රු ම | | Step Note (400 Left) | | | | |
| #2175665 New Step - 2 | Short Text | @ f2 11 | | Enter Step Note | | | | |
| #9751011 New Step - 3 | Multi-Line Text | 42 🗑 | | | | | 11 | |
| #4975052 New Step - 4 | Short Text | @ f2 # | | Options Required | | | | |
| | | | | Show Answer History | | | | |
| | | | | Number of lines to show | | | | |
| | | | | 2 3 5 10 | | | | |
| | | | | | | | | |
| | | | | Enter Default Answer Enter Default Answer | | | | |
| | | | | Einer Delaun Answer | | | | |
| | | | | | | | | |
| | | | | ✓ Step Triggers | | | | |
| | | | | | | Add tri | gger | 1 |
| | | | | ✓ Step Visibility Rules | | | | |
| | | | | | | | | |
| | | | | Show this Step When Any of the following Rules match | | | | |
| | | | | The second may have a match | | | | |
| | | | | | Ad | d Rule | • | |
| | | | - | | | | | |

if the previous step has a visibility default a new down arrow icon will appear.

| Form Designer New Form157 | 4089668984 . | 0.00 (1 Pages, 4 Step: | , ● Visibility Default Checklist2) | ٢ | B | ۲ | × |
|-----------------------------|-----------------|------------------------|--|------------------------------|----------|------|---|
| New Page New Step | New Step w | th Visibility 💌 | Multi-Line Text | | | | |
| New Form157408 | 0669094 | | Step Text (388 Left) | | | | |
| New Page | 9000904 | | New Step - 3 | | | | |
| #71905 New Step - 1 | Short Text | දි <u>ය</u> දි ම | | | | | |
| | | | Step Note (400 Left) Enter Step Note | | | | |
| #2175665 New Step - 2 | Short Text | · 2 i | | | | 1. | |
| #9751011 New Step - 3 | Multi-Line Text | 40 tř | Options | | | | |
| #4975052 New Step - 4 | Short Text | * 4 é | Required | | | | |
| | | | Show Answer History | | | | |
| | | | Number of lines to show 2 3 5 10 | | | | |
| | | | Enter Default answer | | | | |
| | | | Enter Default Answer | | | | |
| | | | ✓ Step Triggers | | | | |
| | | | | | Add trig | gger | I |
| | | | ✓ Step Visibility Rules | | | | |
| | | | Show this Step When Any of the following Rules match | Short Text/E Short Text/A | | | |
| | | | | | | - 0 | |





Form Import

The GoPlant Form Import allows users to import basic form elements, herein defined as "Importable Steps", to rapidly create the framework required for new form creation.

The Form import functionality allows users to import and create a Form from a CSV file created from a csv template or Excel spreadsheet template. After import of basic form data further configuration may be added in the Form Designer such as Email, Asset status, and Exception triggers, or Page visibility and other business logic. In many cases all required information can be imported and the Form published from the Form Designer.

Use the left navigation panel to view the hierarchical structure of your company's organization. . Select the appropriate Storage Group.

| - Helios Solar | * | Helios Solar | r / Plant 2 | | | | | | | |
|----------------|---|--------------|-------------|--------|--------|-------|---------------|-------|-------------|--------------------|
| Plant 1 | | Forms | Form Tools | Assets | Rounds | Tasks | External Tags | Users | User Groups | Plant 2 Properties |
| Plant 2 | | | | | | | | | | |

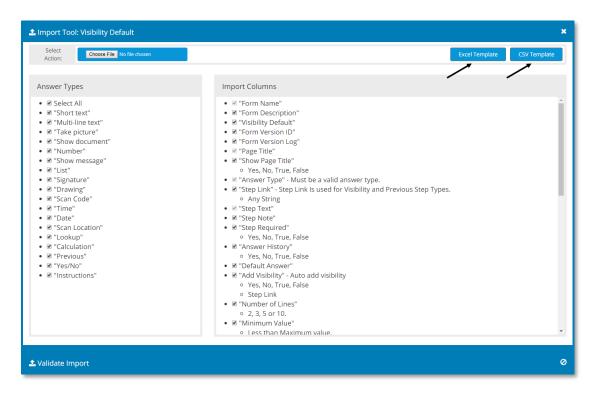
• Select the Forms Tab. The Forms page appears.

| >> | Helios Solar | / Plant 2 | | | | | | | |
|----|--------------|---------------|-------------|--------|-------|---------------|-------|-------------|--------------------|
| | Forms | Form Tools | Assets | Rounds | Tasks | External Tags | Users | User Groups | Plant 2 Properties |
| | New Form | Show Versions | Import Form | | | | | | Q Search |

Click on Import Forms Import Forms button.





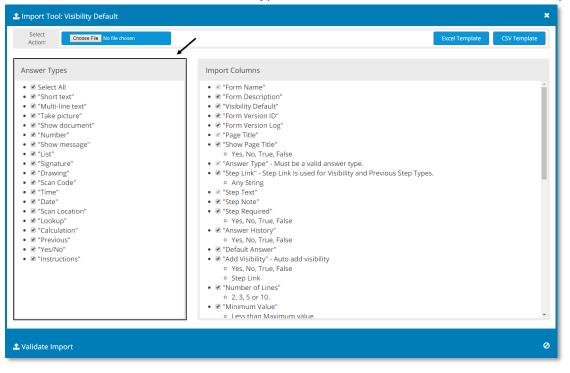


- The Import Tool window will appear. Two types of files may be used for Form Import. A macro enabled Spreadsheet is available from the 'Excel Template' button. A comma delimited file is also available from the 'CSV Template' button. Both methods allow the user to enter Form information and use the file for loading into GoPlant. The Excel template contains macros that help guide the user with information as well as drop down menus for the columns. The CSV template is a simple file format that contains help information above the column headers. Either starting file may be used to create the appropriate CSV import file to load Forms. Column header labels cannot be modified and must remain in English. Columns can be moved or rearranged if the header label remains the same.
- When loading simple forms the Answer Types may be unchecked that will not be used in order to create a custom CSV Template. By unchecking Answer Types in the window the CSV Template exported will only contain the required columns to satisfy the input steps that are required on your Form.





• On the left side the user can select the type of answers that will be included in the template.



• On the right side the user can select the optional columns that will be included in the template Note: The required fields for each type of response will be disabled.

| ᆂ Import Tool: Visibility Default | × |
|--|---|
| Select Action: Choose File No file chosen Answer Types | Excel Template CSV Template |
| Select All "Short text" "Multi-line text" "Take picture" "Show document" "Show message" "List" "Signature" "Drawing" "Scan Code" "Time" "Date" "Scan Location" "Lookup" "Calculation" "Caclulation" "Previous" "Yes/No" "Instructions" | Form Name" Form Description" Visibility Default" Visibility Default" Form Version Log" Form Version Log" Form Version Log" Form Version Log" Segritte" Ystep Text" Segritte" Step Text" Step Required" Yes, No, True, False Segret Required Fields Yato add visibility Yes, No, True, False Madd Visibility" - Auto add visibility Yes, No, True, False Set Default Answer" Step Link Yato add visibility Yes, No, True, False No, True, False Number of Lines" 2, 3, 5 or 10. Winumber of Lines" Less than Maximum value. |
| 📩 Validate Import | 0 |





| Select Choose File No file chosen | Excel Template | CSV Template |
|--|--|--------------|
| Answer Types Select All Select All Multi-line text" Multi-line text" Select All Select All Sele | Import Columns "Form Name" "Form Description" "Isibility Default" "Form Version ID" "Form Version Log" "Page Title" "Show Page Title" Yes, No, True, False "Answer Type" - Must be a valid answer type. "Step Required" "Step Required" "Step Required" "Step Required" Yes, No, True, False "Answer History" Yes, No, True, False "Answer History" Yes, No, True, False "Chefault Answer" "Step Ink Step Link Step Link Step Link Step Link Step Link Step Intervent Step Comparison Step Comparison Step Link Step Link Step Link Step Link "Number of Lines" 2, 3, 5 or 10. "Minimum Value" Less than Maximum value. | |
| Validate Import | | |

- Working with the Excel Template for import
- By Clicking on Excel Template Excel template a new Excel file will be auto generated.
 - NOTE: Your IT department or Company security rules may not allow a macro-enabled spreadsheet to be downloaded. Please contact your IT department if errors or warnings occur.

| A B Export to CSV | ge Layout Formulas Data Ulas lovo the Hormet can contain v C D Visibility Default Form Versi | E Res | edit, it's safer to F set Sheet | G | н | 1 | | | | | | | | | R | | |
|---------------------------|---|------------------------|---------------------------------------|-----------------|-------------|-----------|-----------|-------------|---------------|----------------|----------------|----------------|-----------------|---------------|---------------|-----------------|--------|
| ♥ I × ✓ A B Export to CSV | f. D | E Res | F set Sheet | G | н | 1 | | | | | | | | | | | |
| A B Export to CSV | C D | Res | set Sheet | | | | | | | | | | | | | | |
| Export to CSV | | Res | set Sheet | | | | | | | | | | | | | | |
| | Visibility Default Form Versi | _ | | Show Page Title | | | | | Step Required | Answer History | Default Answer | Add Visibility | Number of Lines | Minimum Value | Maximum Value | Number of Decin | nals (|
| Name Form Description 1 | Viability Default Form Versi | ion ID Form Version Lo | 2g Page Title | Show Page Title | Answer Type | Step Link | Step Text | Step Note | Step Required | Answer History | Default Answer | Add Visibility | Number of Lines | Minimum Value | Maximum Value | Number of Decin | nais |
| Nume Form Description 1 | Visibility Default Form Versi | form Version Lo | >g Page Title | Show Page Title | Answer Type | Step Link | Step Text | Step Note : | Step Required | Answer History | Default Answer | Add Visibility | Number of Lines | Minimum Value | Maximum Value | Number of Decin | nais i |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |

• Click on "Enable Editing"





| Export to CSV | | | | Reset | Sheet | |
|---|--------------------|-----------------|------|-------------|------------|-----------------|
| Form Name Form Description | Visibility Default | Form Version ID | Form | Version Log | Page Title | Show Page Title |
| Form Name Must be unique within the same storage group. Leave empty to use previous row Form Name. | | | | | | |

• Clicking on each cell will indicate what value the user must enter in that column.

| | 9 6 9 9 | | G | | | | | ,P 568 | | | | | | | | | Max Bernard 😬 | | |
|----------------------|------------------|--------------------|-----------------|------------------|-------------|----------------|-----------|-----------------------------|----------------|--------------|---------------|---------------|----------------|----------------|-----------------|-----------|---|------------------|---------|
| | | | ulas Data I | | | | | | | | | | | | | | | 🖒 Share 🖓 Co | |
| X Cut | Calibri | - 11 | - A* A* = = | = 🌮 🎄 | Wrap Text | Genera | el . | ~ | E 6 | Norma | l Bad | Goo | d Neut | tral | 🚟 🎛 | Ξ | AutoSum ~ ZV Fill ~ Sort & Find Clear ~ Filter ~ Select | 1 🗲 🖪 | |
| te La Copy | - B I | U - 1 - 1 4 | · A · = = | | Merce & Cer | ter v S v | % • • | 8 .01 Co | nditional Form | at as Calcul | tion Chec | k Cell Exp | anatory Inpu | t v | Insert Delete I | Format | Sort & Find | k Ideas Sensit | itivity |
| S Forma Clipboard | it Painter | _ | 6 | | | | 10 1 10 | For | natting ~ Tab | le " | | | | | | | Editing | | |
| | | | Tai I | Alignment | | 1 ₃ | Number | Pa I | | | , | aytes | | | Cells | | Eating | I Ideas I Sensi | starty |
| - | 1 × 🗸 | fr Number | | | | | | | | | | | | | | | | | |
| A | 8 | с | D | E | F | G | н | | J. | к | L | м | N | 0 | P | Q | R | s | |
| P | sport to CSV | l | | Rese | t Sheet | - | | | | | | | | | | | | | |
| | iport to cov | | | Nexe | Connect | _ | | 1 | | | | | | | | | | | |
| | Form Description | Visibility Default | Form Version ID | Form Version Log | Page Title | Show Page Titl | le Answer | Type Step | Link Step Te | xt Step Note | Step Required | Answer Histor | Default Answer | Add Visibility | Number of Lines | s Minimum | Value Maximum Value | Number of Decima | als Pr |
| old Salt | | Visibility | | | | | | _ | | | | | | | | | | | |
| nk Form | | Default1 | | | Reading 1 | Yes | | r v | _ | | | | | | * | | | | |
| | | | | | | | | Answer Type Must be a va | id | | | | | | / | | | | / |
| | | | | | | | | GoPlant ansi type. | ver | | | | | | | | | | |
| | | | | | | | | | _ | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |

• When the user selects the Answer Type, cells that do not correspond to the Answer type will change to gray. Columns that have the gray color do not need to be filled out for that specific step type.





| | В | c | D | E | | F | G | н | 1 | J | K | L | м | N | 0 | P | Q | R | S | T | U | V | W |
|----------|------------------|------------------------|------|---------|------|-----------|-----------|--------------|------|----------------|-----------|------|--------|---------|------------|-----------|---------|-----|-----------|-----------|--------|--------|-----------------|
| Ex | oport to CSV | | | | Rese | t Sheet | | | | | | | | | | | | | | | | | |
| | Form | | Form | Form Ve | | | Show Page | | Step | | | Step | Answer | Default | Add | Number of | Minimum | | Number of | Previous | List | Lookup | |
| | | Visibility Default | | Log | | | Title | Answer Type | | Step Text | Step Note | | | Answer | Visibility | | Value | | Decimals | Step Link | | Name | Lookup Show Val |
| old Salt | | Visibility | | | | | | | | | | | | | | | | | | | | | |
| nk Form | ¥ | Default1 | | | | Reading 1 | Yes | Number | 1 | Level | | Yes | Yes | | | | | 500 | 1 1 | 2 | | | |
| Form | | Visibility | | | | | | | | Hot Water | | | | | | | | | | | | | |
| Must | be unique within | Default1 | | | | | | Number | - 1 | Flow Out | | Yes | Yes | | 1 | | | 100 | 1 : | 2 | | | |
| the sa | ame storage | Visibility | | | | | | | | Cold Water | | | | | | | | | | | | | |
| use pr | | Default1 | | | | | | Number | 3 | 8 Flow In | | Yes | Yes | | 2 | | | 100 | | 2 | | | |
| Name | | Visibility | | | | | | | | Cold Water | | | | | | | | | | | | | |
| | | Default1 | | | | | | Number | 4 | Flow Out | | Yes | Yes | | 3 | | | 100 | 1 1 | 2 | | | |
| | | Visibility | | | | | | | | Tempering | | | | | | | | | | | Radio, | | |
| | | Default1 | | | | | | Yes/No | | Valve | | Yes | No | | 4 | | | | | | OK,NOK | | |
| | | Visibility | | | | | | Show | | | | | | | | | | | | | | | |
| | | Default1 | | | | | | message | | | | | | | | | | | | | | | |
| | | Visibility | | | | | | | | Please Take a | | | | | | | | | | | | | |
| | | Default1 | | | | | | Take picture | | Picture: | | Yes | | | | | | | | | | | |
| | | Visibility Default1 | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | Signature | 5 | 8 Signature: | | Yes | | | | | | | | _ | | | |
| | | Visibility Default1 | | | | Reading 2 | | Previous | | Previous Level | | | | | | | | | | | | | |
| | | Visibility | | | | Reading 2 | res | Previous | | Previous Level | | | | | | | _ | | | | | | |
| | | Default1 | | | | | | Number | | Pump Flow | | Yes | Yes | | | | | 100 | | | | | |
| | | Visibility | | | | | | Number | 10 | Botton | | res | res | | | | | 100 | | 4 | | | |
| | | Default1 | | | | | | Number | | Temperature | | Yes | Yes | | 10 | | | 240 | | 2 | | | |
| | | Defaulti | | | | | | Number | | remperature | | res | res | | 10 | , | | 240 | | | | | |
| | | Visibility | | | | | | Multi-line | | | General | | | | | | | | | | | | |
| | | Default1 | | | | | | text | 12 | | Comments | No | No | | 11 | | | | | | | | |
| | | Visibility | | | | | | | | | | | | | | | | | | | | | |
| | | Default1 | | | | | | Signature | 13 | Signature: | | Yes | | | 11 | | | | | | | | |
| | | | | | | | | 0.0.01010 | | 0.8.010.01 | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | |

• Complete all steps and press "Export to CSV" button to create the file to be imported.

| Title | × |
|------------------------|-----------------|
| Please select filename | OK Im Cancel |
| Coldsalttankform.csv | |

- Enter the file name and press "OK"
- The new CSV file will be created in the same directory where the original excel file was downloaded.

| ᆂ Import Tool: Visibility Default | × |
|--|---|
| Select Choose File No file chosen | Excel Template CSV Template |
| Answer Types Select All South Select All Sout | Import Columns |
| Ø "Signature" Ø "Scan Code" Ø "Time" Ø "Scan Location" Ø "Lookup" Ø "Lookup" Ø "Previous" Ø "Yes/No" Ø "Instructions" | @ "Answer Type" - Must be a valid answer type. @ "Step Link" - Step Link Is used for Visibility and Previous Step Types. o Any String @ "Step Text" @ "Step Note" @ "Step Required" o Yes, No, True, False @ "Answer History" o Yes, No, True, False @ "Default Answer" @ "Add Visibility" - Auto add visibility o Yes, No, True, False o Yes, No, True, False o Yes, No, True, False @ "Add Visibility" - Auto add visibility o Yes, No, True, False o Step Link |
| | Step Entropy of Lines" v. 2, 3, 5 or 10. "Minimum Value" o Less than Maximum value. Greater than Minimum value. Greater than Minimum value. |
| ▲ Validate Import | ٥ |

• Select "Choose file" on the Import Tool window and select the csv file





| nport Tool: Visibility Defau | ılt 🖊 | | | | | | \$ |
|--|------------|-------------|-----------------|----------|-------------------------|----------------------------------|----|
| alidate Import: Coldsalttar | nkform.csv | | | | | | , |
| Ready | Save | | | | | | ľ |
| | | | | | | | |
| orm Name | | | | | Description | | |
| old Salt Tank Form | | | | | | | |
| ge Title | | | Show Page Title | | | | |
| teading 1 | | | V | | | | |
| Step Text Step Link | Step Note | Answer type | e Requi | red Show | v Answer History | Default Answer | |
| Level 1 | | Number | \$ | 4 | | | |
| Number Of Decimals: 2 | | Minimum V | /alue: 0 | Ma | kimum Value: 500 | | |
| Step Text | Step Link | Step Note | Answer type | Required | Show Answer History | Default Answer | |
| Hot Water Flow Out | 2 | | Number | V | ×. | | |
| Number Of Decimals: 2 | | Minimum V | alue: 0 | Ma | kimum Value: 100 | Step Visibility Rules: Show this | |
| step when Any of the following rule Step Link: 1 Number/A | | ous Value | | | | | |
| Step Text | Step Link | Step Note | Answer type | Required | Show Answer History | Default Answer | |
| Cold Water Flow In | 3 | | Number | S. | 2 | | |
| Number Of Decimals: 2 | | Minimum V | alue: 0 | Ma | kimum Value: 100 | Step Visibility Rules: Show this | |
| step when Any of the following ru • Step Link: 2 Number/A | | ous Value | | | | | |
| Step Text | Step Link | Step Note | Answer type | Required | Show Answer History | Default Answer | |

• A validation window will appear with all the configuration of the form imported from the csv file. Note: The upper left corner will indicate "Ready" if the form passed the form validations.

| Ready | | Save | | | | | | |
|-------------------|--|------------------------------|----------------------|-------------|-----------------------|-------|---------------------|----------------------------------|
| 1 | \ | | | | | | | |
| orm Name | • | | | | | | Description | |
| Cold Salt Tank Fo | orm | | | | | | | |
| age Title | | | | Show Page | e Title | | | |
| Reading 1 | | | | ×. | | | | |
| Step Text | Step Link | Step Note | Answer typ | e | Required | Show | Answer History | Default Answer |
| Level | 1 | | Number | | ✓ | 4 | | |
| Number Of De | cimals: 2 | | Minimum | Value: 0 | | Maxir | num Value: 500 | |
| Step Text | | Step Link | Step Note | Answer type | Requi | red | Show Answer History | Default Answer |
| Hot Water Flow | w Out | 2 | | Number | ×. | | V | |
| Number Of De | cimals: 2 | | Minimum | Value: 0 | | Maxir | num Value: 100 | Step Visibility Rules: Show this |
| | of the following rul k: 1 Number/Ar | es match nswered 🔲 Previo | ous Value | | | | | |
| Step Text | | Step Link | Step Note | Answer type | Requir | ed | Show Answer History | Default Answer |
| Cold Water Flo | w In | 3 | | Number | ¢. | | Y | |
| | of the following rul | es match nswered 🔲 Previo | Minimum ous Value | Value: 0 | | Maxir | num Value: 100 | Step Visibility Rules: Show this |
| | | | | | | | | |
| | | | | | | | | |

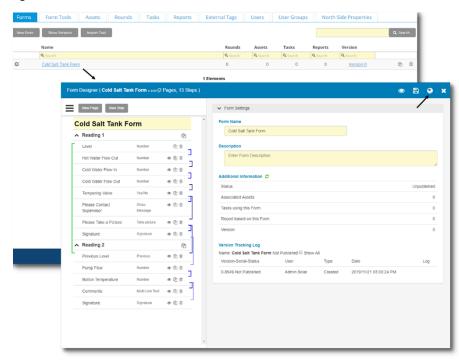
• Press "Save" to create the new Form in the selected Storage Group





| 📤 Import Tool: | North Side | | | | | | | × | |
|---------------------|--|-------------------------------------|-----------|-----------|-------------|----------|---------------------|----------------------------------|----|
| ᆂ Validate Imp | ort: Coldsalttankfo | orm.csv | | | | | | + | |
| Ready | ý | / | | | | | | Í | |
| Cold Salt T | ank Form - Saving | | | | | | | | |
| Form Name | | | | | | Descrip | tion | | |
| | 🛓 Import Tool: No | rth Side | | | | | | | × |
| Page Title | 1. Validate Import: | : Coldsalttankf | orm.csv | | | | | | ¥ |
| Reading 1 Step Text | Ready | | | | | | | | 11 |
| Level | Cold Salt Tank | k Form - Saved | / | | | | | | 1 |
| Number O | | | | | | | | | |
| Step Text | Form Name | | | | | | Description | | |
| Hot Water | | n | | | | | | | U. |
| Number O | Page Title | | | | Show Page T | itle | | | 11 |
| step when • Step | Reading 1 | | | | × | | | | |
| | Step Text | Step Link | Step Note | Answer ty | /pe Re | quired | Show Answer History | Default Answer | |
| Step Text | Level | 1 | | Number | 1 | × | 2 | | |
| Cold Wate | Number Of Decin | nals: 2 | | Minimun | n Value: 0 | | Maximum Value: 500 | | |
| Number O | | | | | | | | | |
| step when | Step Text | | Step Link | Step Note | Answer type | Require | | Default Answer | |
| • Step | Hot Water Flow C | Dut | 2 | | Number | × | 2 | | |
| | Number Of Decin | | | Minimun | n Value: 0 | | Maximum Value: 100 | Step Visibility Rules: Show this | |
| | step when Any of t Step Link: | 1 Number/Ans | | ous Value | | | | | |
| | Step Text | | Step Link | Step Note | Answer type | Required | Show Answer History | Default Answer | |
| | Cold Water Flow | In | 3 | | Number | | 2 | | |
| | Number Of Decin | nals: 2 | | Minimun | n Value: 0 | | Maximum Value: 100 | Step Visibility Rules: Show this | |
| | step when Any of Step Link: | the following rules 2 Number/Ans | | ous Value | | | | | |
| | | | | | | | | | - |
| | | | | | | | | | |

- The status "Saving" and "Saved" will be indicated. Note: The time it takes to save the form will depend on the number of steps added.
- The new Form will now appear in the list of forms of the selected Storage Group when you close the Import Tool design window.



Note: The form must be published before it can be used!





If the csv file has validation problems a pop-up window will appear indicating the errors found.
 Each error will also display the row number within the file so that they can easily be corrected.
 Make a note or take a screenshot to remember all errors and fix them before attempting to import.

| mport Tool: North Side | | | | | | |
|---|--|---|---|------------------------------------|--|--|
| | | ed for form "Cold | d Salt Tank Form" | | | |
| alidate Import: GoPlantFo | • Missing Ste | ep Text found in s | tep {"Link 1"} on page | "Reading 1"}. | Import row {2} on form {"Co | ld Salt |
| Ready | Tank Form | "} sibility details foun | | | ervisor" on page "Reading | |
| orm Name Cold Salt Tank Form | | | id in step "Link 7 Pleas | e Take a Pictur | re:" on page "Reading 1". In | nport |
| | | | | | | |
| age Title | _ | | | | | Ok |
| Reading I | | | (V) | | | |
| | | | | | | |
| Step Text Step Link | Step Note | Answer typ | e Required | Show | Answer History | Default Answer |
| Step Text Step Link | Step Note | Answer typ Number | e Required | Show | Answer History | Default Answer |
| | Step Note | | | | Answer History | Default Answer |
| 1 Validation Failed | | Number | Ø | | Answer History | Default Answer |
| 1 | | Number | "}. Import row {2} | 3 | Answer History | Default Answer |
| 1 Validation Failed Missing Step Text found in | | Number | "}. Import row {2} | 3 | | Default Answer |
| 1 Validation Failed Missing Step Text found in Number Of Decimals: 2 | step {"Link 1"} on j | Number page {"Reading 1 Minimum | "}. Import row {2} Value: 0 | | imum Value: 500 | |
| 1 Validation Failed Missing Step Text found in Number Of Decimals: 2 Step Text Hot Water Flow Out | step ("Link 1") on j Step Link | Number page ("Reading 1 Minimum Step Note | ✓ | ⊗ Maxi Required ⊗ | imum Value: 500 Show Answer History & | Default Answer |
| 1 Validation Failed Missing Step Text found in Number Of Decimals: 2 Step Text Hot Water Flow Out Number Of Decimals: 2 step when Any of the following r | step {"Link 1"} on p Step Link 2 iles match | Number page ("Reading 1 Minimum Step Note Minimum | ✓ | ⊗ Maxi Required ⊗ | imum Value: 500 Show Answer History | |
| 1 Validation Failed Missing Step Text found in Number Of Decimals: 2 Step Text Hot Water Flow Out Number Of Decimals: 2 | step {"Link 1"} on p Step Link 2 iles match | Number page ("Reading 1 Minimum Step Note Minimum | ✓ | ⊗ Maxi Required ⊗ | imum Value: 500 Show Answer History & | Default Answer |
| 1 Validation Failed Missing Step Text found in Number Of Decimals: 2 Step Text Hot Water Flow Out Number Of Decimals: 2 step when Any of the following r | step {"Link 1"} on p Step Link 2 iles match | Number page ("Reading 1 Minimum Step Note Minimum | ✓ | ⊗ Maxi Required ⊗ | imum Value: 500 Show Answer History & | Default Answer |
| 1 Validation Failed Missing Step Text found in Number Of Decimals: 2 Step Text Hot Water Flow Out Number Of Decimals: 2 step when Any of the following r • Step Link: 1 Number// | step ("Link 1") on j Step Link 2 Iles match inswered Previo | Number page ("Reading 1 Minimum Step Note Minimum us Value | The second seco | ⊗ Maxi Required ⊗ Maxi | imum Value: 500 Show Answer History & imum Value: 100 | Default Answer Step Visibility Rules: Show this |
| 1 Validation Failed Missing Step Text found in Number Of Decimals: 2 Step Text Hot Water Flow Out Number Of Decimals: 2 step when Any of the following r • Step Link: 1 Number// Step Text | step ("Link 1") on j Step Link 2 iles match inswered Previo Step Link | Number page ("Reading 1 Minimum Step Note Minimum us Value | The second seco | Maxi Required Maxi Maxi | imum Value: 500 Show Answer History imum Value: 100 Show Answer History | Default Answer Step Visibility Rules: Show this |

• By clicking "Ok" the user can see the location of each error shown in the pop-up window. These errors are highlighted in the Validate Import window as the user scrolls up and down through all steps in the import file. If the status is "Ready" at the top of the Form Import window the errors that are shown do not inhibit the Import. The form can still be imported but the user must fix these errors in the Form Designer at a later time before publishing. Many "errors" are not critical and adding information with the Form Designer will clear them before publishing the form.

| 1 Import Tool: North Side | | | | | | × | |
|---|---|------------------|-------------------|--------------------|----------|---------------------|------------------------------------|
| 2 Validate Import: GoPlantFormImportTempl | ate.csv | | | | | + | |
| Ready | | | | | | Î | |
| Cold Salt Tank Form - Saving | | | | | | - 11 | |
| Form Name | | | Description | | | | |
| Cold Salt Tank Form | 📤 Import Tool: North Side | | | | | | × |
| Page Title | | | | | | | |
| Reading 1 | Validate Import: GoPlantForm | ImportTempla | ate.csv | | | | Ψ |
| Step Text Step Link Step Note | Ready | / | | | | | * |
| Validation Failed | Cold Salt Tank Form - Saved | - | | | | | |
| Missing Step Text found in step ("Link 1") or | Form Name | | | | | Description | |
| Number Of Decimals: 2 | Cold Salt Tank Form | | | | | | |
| Step Text Step Link | Page Title | | | Show Page Title | | | |
| Hot Water Flow Out 2 | Reading 1 | | | × | | | |
| Number Of Decimals: 2 step when Any of the following rules match | Step Text Step Link | Step Note | Answer typ | e Require | d Show | v Answer History | Default Answer |
| Step Link: 1 Number/Answered Pre- | 1 | | Number | 2 | | | |
| | Validation Failed | | | | | | |
| Step Text Step Link | Missing Step Text found in ste | ep {"Link 1"} on | page ("Reading 1" | '}. Import row {2} | | | |
| Number Of Decimals: 2 | Number Of Decimals: 2 | | Minimum | Value: 0 | Ma | kimum Value: 500 | |
| | Step Text | Step Link | Step Note | Answer type | Required | Show Answer History | Default Answer |
| | Hot Water Flow Out | 2 | | Number | ×. | 2 | |
| | Number Of Decimals: 2 | | Minimum | Value: 0 | Ma | kimum Value: 100 | Step Visibility Rules: Show this |
| | step when Any of the following rules Step Link: 1 Number/Ans | | ious Value | | | | |
| | Step Text | Step Link | Step Note | Answer type | Required | Show Answer History | Default Answer |
| | Cold Water Flow In | 3 | | Number | 12 | × | |
| | Number Of Decimals: 2 | | Minimum | Value: 0 | Ma | kimum Value: 100 | Step Visibility Rules: Show this 🗣 |
| | | | | | | | |





- The status "Saving" and "Saved" will be indicated.
- Note: The time it takes to save the form will depend on the number of steps added.
- After the import is finished close the Form Import window to return to the Forms tab listing. Locate the imported Form and click to open it in the Form Designer to fix the errors.

| New Form | Show Versions | Import Tool | 1 | | | | | | | | | | Q, Search | |
|----------|---------------------|-------------|------------------------|---------------|---|-------------------------------|----------------------------------|-----------------|------------------|-----------------|-----------|---|-------------------------|-------------|
| | Name | | | | | | Rounds | Assets | Tasks | Reports | Version | | | |
| | Q Search | | | | | | Q Search | Q. Search | Q Search | Q Search | Q Search | | | |
| 8 | Cold Salt Tank Form | 、 | | | | | 0 | 0 | 0 | 0 | Version (| ٥ | 2 | |
| | | ~ F | rm Designer | Cold Salt Ta | nk Form 🛪 🕬 (2 | Pages, 13 | 3 Steps) | | | | | | | 2 2 0 |
| | | = | New Page | It Tank | Form has valid Missing step te Missing visibilit Missing visibilit | ext found in ty details fo | step ** on paj und in step *F | lease Contact S | | | | | | |
| | | | | | | | | | | | | | OK | |
| | | | Hot Water | Flow Out | Number | * 7 8 | - | Ente | r Form Descripti | on | | | | |
| | | | Cold Wate | | Number | @ (?) B | | Additiona | Information | 0 | | | | |
| | | | | r Flow Out | Number | * f2 i | | Status | | | | | | Unpublished |
| | | | Tempering | Valve | Yes/No | * E B | - | Associat | ed Assets | | | | | 0 |
| | | | Please Co Superviso | | Show Message | @ (2) B | | Tasks us | ing this Form | | | | | 0 |
| | | | Please Ta | ke a Picture: | Take picture | @ (2) B | _ | | ased on this For | m | | | | 0 |
| | | | Signature. | | Signature | @ 428 | | Version | | | | | | 0 |
| | | | Reading | 2 | | ć | 2 | Version 1 | racking Log | | | | | |
| | | | Prévious l | evel | Previous | * 2 B | - | | | rm Not Publishe | | | | |
| | | | Pump Flo | v | Number | ල එ ම | | | Serial-Status | User | | | Date 2019/11/21 03:52:1 | Log |
| | | | Botton Ter | nperature | Number | ⊕ < 2 8 | 1 | 00000 | 0.1 00000000 | | | | 2010/11/21/00:02.1 | 10 1 10 |
| | | | Comment | E. | Multi-Line Text | @ (?) B | - | | | | | | | |
| | | | Signature. | | Signature | @ (?) B | - T | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |

Note: The user must solve the validation errors before publishing.

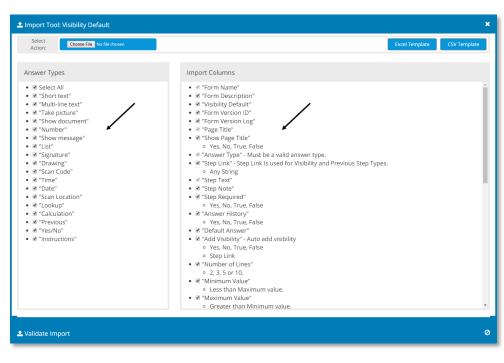
- Working with CSV Template

In addition to the Excel Template, the 'CSV Template' button will generate a CSV file based upon the Answer types chosen in the column and the Import Column items chosen. This allows for custom selection of the actual import file columns that will be available. Users may want to eliminate columns that they will not use to simplify the input file when loading into GoPlant.

• Click on "Import Tool" mport Tool button.







• Select the Answer Types and Import Columns options to generate the CSV file.

| Answer Types Import Columns Select All Short text" Torm Description" Torm Version ID" Step Ink' - Step Ink Is used for Visibility and Previous Step Types. Answer Type: - Must be a valid answer type. Step Ink' - Step Ink' - Step Ink Is used for Visibility and Previous Step Types. Answer History" Step Note" Step Ink Step Ink Step Ink Step Ink | Action: Choose File No file chosen | Excel Template CSV Te | J |
|---|--|---|---|
| o 2, 3, 5 or 10. [®] "Minimum Value" o Less than Maximum value. | Select All S'short text" Short text" Take picture" Show document" Show document" Show message" Stantumer" Stanture" Stanture <li< th=""><th> * "Form Name" * "Form Description" * "Form Version ID" * "Shop Tute" * "Step Text" * "Step Text" * "Step Required" • Yes, No, True, False * "Default Answer" * "Default Answer" * "Step Itins" • Yes, No, True, False * "Default Answer" • Yes, No, True, False * "Default Answer" • Yes, No, True, False * "Number of Lines" • 2, 3, 5 or 10. </th><th></th></li<> | * "Form Name" * "Form Description" * "Form Version ID" * "Shop Tute" * "Step Text" * "Step Text" * "Step Required" • Yes, No, True, False * "Default Answer" * "Default Answer" * "Step Itins" • Yes, No, True, False * "Default Answer" • Yes, No, True, False * "Default Answer" • Yes, No, True, False * "Number of Lines" • 2, 3, 5 or 10. | |

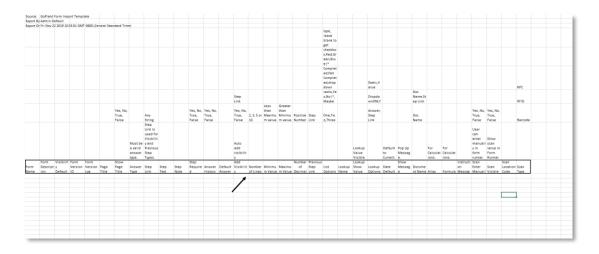
- By Clicking on CSV Template a new csv file will be auto generated.
- Open the CSV file.







Row 1 to row 9 shows complementary information for the user and examples of responses.
 Because this is not a macro enabled file, the help information and instructions were placed in the first 9 rows of the file. These extra rows will be ignored upon input to GoPlant.



• Row 10 shows all fields selected in the import tool options.





| iource: | GoPlant Fo | orm Import | Template | | | | | | | | | | | | | | | | | | | | | | |
|-----------|------------|------------------------|--------------|--------------|------------|-------------------------|---------------------------------------|--------------------------------|---------------------------|-----------|----------------------------|----------------------------|--------------|-----------------------|-------------------|---------------------------------|---------|----------|-----------|---|--------------|------------------------|---------------------|--------------------------|------------------|
| xport By: | Admin Def | ault | | | | | | | | | | | | | | | | | | | | | | | |
| port On | Thu Nov 21 | 1 2019 09:1 | 31:47 GMT-06 | 500 (Central | Standa | rd Time) | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | Yes/No type, leave blank to get defaults. | | | | | |
| | | | | | | | | | | | | | | | | | | | | checkbox,Red,G reen,Blue * | | | | | |
| | | | | | | | | | | | | | | | | | | | | Completed,Not Completed,dro pdown | | | tatic,Val ie | | |
| | | | | | | | | | | | | | s | tep Link | | | | | | radio,Yes,No *, Maybe | | | Propdow | | |
| | | | | | | Yes, No, True, False | | Any String | | | Yes, No, True, False | Yes, No, True, False | т | | 2, 3, 5 or 10. | Less than Maximu m value. | Minimum | | Step Link | One,Two,Three | | | inswer,St p Link | | |
| | | | | | | | Must be a valid answer type. | and Previous Step Types. | | | | | v | iuto add isibility | | | | | | | Va Vis | okup ilue sible. | t | Default o Current. | |
| | Form Desc | Visibility I | Form Vers Fo | rm Vers Pag | ge Title : | Show Page | Answer Type | Step Link | Step Text | Step Note | Step Requ | Answer Hi | Default Ar A | dd Visibi | i Number o | Minimum | Maximum | Number o | Previous | List Options | Lookup Na Lo | okup Sh Li | ookup Or C | Date Defa | Show |
| old Salt | | | | | | | | | | | | | | | | | | | | | | | | | |
| ank | | Visibility | | Rea | ading | | | | | | | | | | | | | | | | | | | | |
| orm | Imported 1 | Visibility | | 1 | | yes | Number | | Level Hot Water | | Yes | Yes | | | | c | 500 | 2 | | | / | | | | |
| | | Default1 | | | | | Number | | Flow Out | | Yes | Yes | | 1 | | | 100 | 2 | | × | | | | | |
| | | Visibility | | | | | | | Cold Water | | | | | | | | | | | | | | | | |
| | | Default1 | | | | | Number | | Flow In | | Yes | Yes | | 2 | | c | 100 | 2 | | | | | | | |
| | | Visibility Default1 | | | | | Number | | Cold Water Flow Out | | Yes | Yes | | | | | 100 | | | | | | | | |
| | | Visibility | | | | | remaer | | Temperin | | | | | 3 | | | 100 | - | | | | | | | |
| | | Default1 | | | | | Yes/No | | g Valve | | Yes | No | | 4 | | | | | | Radio, OK,NOK | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | Please Contac |

- Complete the CSV file and save it in CSV format UTF-8 (Comma delimited) (* .csv)
- Note that if UTF-8 format is not used special characters and double-byte language text will not work properly.
- All Column header labels must remain in the English Language.
- Select "Choose file" on the Import Tool window and select the csv file

| /alidate Impor | t: Coldsalttan | oform cou | | | | | |
|------------------------------------|--|------------------------------|-------------|-----------------|-----------|---------------------|----------------------------------|
| | | (101111.03) | | | | | |
| Ready | | Save | | | | | |
| | | | | | | | |
| orm Name | | | | | | Description | |
| Cold Salt Tank For | m | | | | | | |
| age Title | | | | Show Page | Title | | |
| Reading 1 | | | | ø | | | |
| Step Text | Step Link | Step Note | Answer type | e R | equired S | how Answer History | Default Answer |
| Level | 1 | | Number | | 1 | Ø. | |
| Number Of Dec | imals: 2 | | Minimum V | /alue: 0 | | Maximum Value: 500 | |
| Step Text | | Step Link | Step Note | Answer type | Required | Show Answer History | Default Answer |
| Hot Water Flow | Out | 2 | | Number | ý | ×. | |
| Number Of Deci step when Any of | f the following rule | | Minimum V | /alue: 0 | | Maximum Value: 100 | Step Visibility Rules: Show this |
| Step Link | :: 1 Number/Ar | nswered 🔲 Previo | ous Value | | | | |
| Step Text | | Step Link | Step Note | Answer type | Required | Show Answer History | Default Answer |
| Cold Water Flov | v In | 3 | | Number | ¢. | ¥ | |
| Number Of Deci | imals: 2 | | Minimum V | /alue: 0 | | Maximum Value: 100 | Step Visibility Rules: Show this |
| step when Any of | f the following rule :: 2 Number/Ar | es match nswered 🔲 Previo | ous Value | | | | |
| | | | | | | | |

• A validation window will appear with all the configuration of the form imported from the csv file. Note: The upper left corner will indicate "Ready" if the form passed the form validations.





| 🏝 Import Tool: No | rth Side | | | | | | × |
|---------------------------------------|--------------|-----------------------------|-------------|-----------------|----------|---------------------|----------------------------------|
| 🏝 Validate Import: | Coldsalttank | form.csv | | | | | ¥ |
| Ready | | Save | | | | | <u>^</u> |
| Form Name | | | | | | Description | |
| Cold Salt Tank Form | 1 | | | | | | |
| Page Title | | | | Show Page Title | | | |
| Reading 1 | | | | ×. | | | |
| Step Text | Step Link | Step Note | Answer type | e Requir | ed Sho | w Answer History | Default Answer |
| Level | 1 | | Number | ø | ď | | |
| Number Of Decin | nals: 2 | | Minimum V | /alue: 0 | Ma | ximum Value: 500 | |
| Step Text | | Step Link | Step Note | Answer type | Required | Show Answer History | Default Answer |
| Hot Water Flow C |)ut | 2 | | Number | 1 | ×. | |
| Number Of Decin | nals: 2 | | Minimum V | alue: 0 | Ma | ximum Value: 100 | Step Visibility Rules: Show this |
| step when Any of t • Step Link: | | s match swered 🔲 Previou | us Value | | | | |
| Step Text | | Step Link | Step Note | Answer type | Required | Show Answer History | Default Answer |
| Cold Water Flow I | in | 3 | | Number | all. | ×. | |
| Number Of Decin | nals: 2 | | Minimum V | alue: 0 | Ma | ximum Value: 100 | Step Visibility Rules: Show this |
| step when Any of t • Step Link: | | s match swered 🔲 Previou | us Value | | | | |
| Step Text | | Step Link | Step Note | Answer type | Required | Show Answer History | Default Answer |
| • • • • • • • • • • • • • • • • • • • | | | | | | | |

• Press "Save" to create the new Form in the selected Storage Group

| 🚣 Import Tool | l: North Side | | | | | | | | * | |
|------------------------|------------------------------|-----------------------|-----------------|-----------|-------------|--------|------------|---------------------|----------------------------------|---|
| 🌲 Validate Im | port: Coldsalttan | kform.csv | | | | | | | * | |
| Rea | idy | / | | | | | | | 1 | |
| Cold Salt | Tank Form - Savir | ng | | | | | | | | |
| Form Name | | | | | | D | escription | | | |
| Cold Salt Ta | 🛓 Import Tool: | North Side | | | | | | | | × |
| Page Title | 1 Validate Impo | ort: Coldsalttank | form.csv | | | | | | | ÷ |
| Reading 1 | Ready | , | | | | | | | | |
| Step Text | incoo) | | / | | | | | | | |
| Level | Cold Salt T | ank Form - Saved | ~ | | | | | | | |
| Number O | | antionin Saveo | | | | | | | | |
| | Form Name | | | | | | | Description | | |
| Step Text Hot Water | Cold Salt Tank F | orm | | | | | | | | |
| | Page Title | | | | Show Page T | itle | | | | |
| Number O step when | Reading 1 | | | | 2 | itte | | | | |
| • Step | | | | | | | | | | |
| | Step Text | Step Link | Step Note | Answer ty | | quired | | w Answer History | Default Answer | |
| Step Text | Level | 1 | | Number | | 1 | 8 | | | |
| Cold Wate | Number Of De | ecimals: 2 | | Minimum | Value: 0 | | Ma | ximum Value: 500 | | |
| Number O | Step Text | | Step Link | Step Note | Answer type | Re | equired | Show Answer History | Default Answer | |
| step when • Step | Hot Water Flo | w Out | 2 | Step Hote | Number | | Ø | | benute Anatter | |
| | Number Of De | acimals: 2 | | Minimum | Value: 0 | | Ma | ximum Value: 100 | Step Visibility Rules: Show this | |
| | step when Any | of the following rule | | | value. o | | | | step visionty tutes. show this | |
| _ | Step Lin | nk: 1 Number/An | swered 🗆 Previo | ous Value | | | | | | |
| | Step Text | | Step Link | Step Note | Answer type | Re | quired | Show Answer History | Default Answer | |
| | Cold Water Fl | ow In | 3 | | Number | | 2 | 2 | | |
| | Number Of De | cimals: 2 | | Minimum | Value: 0 | | Ma: | ximum Value: 100 | Step Visibility Rules: Show this | |
| | | of the following rule | | | | | | | | |
| | Step Lit | nk: 2 Number/An | swered 🗆 Previo | ous Value | | | | | | |
| L | | | | | | | | | | * |
| | | | | | | | | | | |
| _ | | | | | | | | | | - |

- The status "Saving" and "Saved" will be indicated. Note: The time it takes to save the form will depend on the number of steps added.
- To verify that the form was saved successfully, close the Import tool, the new Form must appear in the list of forms of the selected Storage Group.





| Form | Designer Cold Salt Tan | k Form ∝ (2 | Pages, 13 Steps |) | | | | ٩ | | × |
|------|------------------------------|-----------------|-----------------|---|--|---------------------|---------|------------------------|-----------|----|
| ≡ | New Page New Step | | | 1 | ✓ Form Settings | | | | / | |
| (| old Salt Tank Fo | orm | | * | Form Name | | | | | |
| | Reading 1 | | ත | | Cold Salt Tank Form | | | | | |
| Г | Level | Number | 心 🖻 | | Description | | | | | |
| | Hot Water Flow Out | Number | @ 创窗 | | Enter Form Description | | | | | |
| | Cold Water Flow In | Number | ල එ ම | | | | | | | |
| | Cold Water Flow Out | Number | ල එබ | | Additional Information C Status | | | | Unpublish | ed |
| | Tempering Valve | Yes/No | ● CL B | | Associated Assets | | | | Chposien | 0 |
| | Please Contact Supervisor | Show Message | ල එෙම | | Tasks using this Form | | | | | 0 |
| | Please Take a Picture: | Take picture | * 作言 | | Report based on this Form | | | | | 0 |
| | Signature: | Signature | 田仁台 | | Version | | | | | 0 |
| 1 | Reading 2 | | ළු | | Version Tracking Log | | | | | |
| | Previous Level | Previous | @ @ 前 | | Name: Cold Salt Tank Form Not P Version-Serial-Status | ublished E Show All | Туре | Date | Log | |
| | Pump Flow | Number | ලෙදාව | | 0-8949-Not Published | Admin Solar | Created | 2019/11/21 03:03:24 PM | Log | |
| | Botton Temperature | Number | | | | | | | | |
| | Comments: | Multi-Line Text | ල එ බ | | | | | | | |
| | Signature: | Signature | · 신 8 | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | ÷ | | | | | | |

Note: The form must be published

• If the csv file has validation problems, a pop-up window will appear indicating the errors found. Make a note or take a screenshot to remember all errors and fix them before attempting to import.

| | | Validation f- | ad for form "O- | ld Salt Tank Form" | | | |
|--|---|--|---|---|------------------------------------|--|---|
| alidate Impo | ort: GoPlantForm | | led for form "Co | old Salt Tank Form | | | |
| | | Missing St | | step {"Link 1"} on page | {"Reading 1"}. | Import row {2} on form {"Cold | d Salt |
| Ready | ′ s | Tank Form Missing vis | | und in step "Link 6 Plea | se Contact Sup | ervisor" on page "Reading 1". | |
| | | Import row | 7 | | | | |
| orm Name | | Missing vis row 8 | sibility details fou | ind in step "Link 7 Plea | se Take a Pictu | re:" on page "Reading 1". Imp | toort |
| Cold Salt Tank F | orm | • | | | | | |
| | | | | | | | |
| age Title | | | | | | | Ok |
| Reading 1 | | | | | | | |
| Step Text | Step Link | Step Note | Answer ty | ype Require | d Show | Answer History | Default Answer |
| | | | | | | | |
| | 1 | | Number | × | d. | | |
| | | | Number | Ø | Ø | | |
| Validation F | Failed | n (llink 41) on | | | ø | | |
| Missing Step | Failed p Text found in ste | ep {"Link 1"} on | page {"Reading | 1"}. Import row {2} | | | |
| | Failed p Text found in ste | ep {"Link 1"} on | page {"Reading | | | imum Value: 500 | |
| Missing Step | Failed p Text found in ste | p {"Link 1"} on Step Link | page {"Reading | 1"}. Import row {2} | | imum Value: 500 Show Answer History | Default Answer |
| Missing Step | Failed p Text found in ste ecimals: 2 | | page {"Reading Minimur | 1"}. Import row {2} n Value: 0 | Max | | Default Answer |
| Missing Step Number Of De Step Text | Failed p Text found in ste ecimals: 2 w Out | Step Link | page {"Reading Minimur Step Note | 1"}. Import row {2} n Value: 0 Answer type | Max Required | Show Answer History | Default Answer Step Visibility Rules: Show this |
| Missing Step Number Of De Step Text Hot Water Flor Number Of De step when Any | Failed p Text found in stee ecimals: 2 w Out ecimals: 2 of the following rules | Step Link 2 match | page ("Reading Minimur Step Note Minimur | 1"). Import row {2} n Value: 0 Answer type Number | Max Required | Show Answer History | |
| Missing Step Number Of De Step Text Hot Water Flor Number Of De step when Any | Failed p Text found in ste ecimals: 2 w Out ecimals: 2 | Step Link 2 match | page ("Reading Minimur Step Note Minimur | 1"). Import row {2} n Value: 0 Answer type Number | Max Required | Show Answer History | |
| Missing Step Number Of De Step Text Hot Water Flor Number Of De step when Any | Failed p Text found in stee ecimals: 2 w Out ecimals: 2 of the following rules | Step Link 2 match | page ("Reading Minimur Step Note Minimur | 1"). Import row {2} n Value: 0 Answer type Number | Max Required | Show Answer History | |
| Missing Step Number Of De Step Text Hot Water Flo Number Of De step when Any • Step Lir | Failed p Text found in ste seimals: 2 w Out teimals: 2 rothe following rules nk: 1 Number/Ans | Step Link 2 match wered Previc | page ("Reading Minimur Step Note Minimur ous Value | 1"). Import row {2} m Value: 0 Answer type Number m Value: 0 | Max Required Ø Max | Show Answer History | Step Visibility Rules: Show this |
| Missing Step Number Of De Step Text Hot Water Flo Number Of De step when Any Step Lir Step Text | Failed p Text found in stee secimals: 2 w Out secimals: 2 of the following rules rk: 1 Number/Ans | Step Link 2 match wered Previc Step Link | page ("Reading Minimur Step Note Minimur ous Value Step Note | 1"). Import row {2} m Value: 0 Answer type Number m Value: 0 Answer type | Max Required Max Required | Show Answer History | Step Visibility Rules: Show this |

• By clicking "Ok" the user can see the location of each error shown in the pop-up window, if the status is still "Ready" in Form Import, the form can be imported and the user can fix these errors in the Form Designer at a later time.





| 1 Import Tool: North Side | | | | | | × | |
|--|---|-----------------------|--------------------------|-----------------|----------|---------------------|------------------------------------|
| L Validate Import: GoPlantFormImportTemp | late.csv | | | | | * | |
| Ready | | | | | | i i | |
| Cold Salt Tank Form - Saving | | | | | | - 11 | |
| Form Name | | | Description | | | | |
| Cold Salt Tank Form | 🛓 Import Tool: North Side | | | | | | |
| Page Title | | | | | | | |
| Reading 1 | 🛓 Validate Import: GoPlant | FormimportTempl | ate.csv | | | | 4 |
| Step Text Step Link Step Note | Ready | | | | | | i |
| Validation Failed | Cold Salt Tank Form - Sa | aved | | | | | |
| Missing Step Text found in step {"Link 1"} o | Form Name | | | | | Description | |
| Number Of Decimals: 2 | Cold Salt Tank Form | | | | | | |
| Step Text Step Link | Page Title | | | Show Page Title | | | |
| Hot Water Flow Out 2 | Reading 1 | | | 8 | | | |
| Number Of Decimals: 2 | | | | | | | |
| step when Any of the following rules match Step Link: 1 Number/Answered | Step Text Step Link | Step Note | Answer type Number | Required | Shov | v Answer History | Default Answer |
| step Link: TNumber/Answered © Pre | ' · | | Number | 2 | 10 | | |
| Step Text Step Link | Validation Failed | | | | | | |
| Cold Water Flow In 3 | Missing Step Text found | in step ("Link 1") or | n page ("Reading 1"). In | port row {2} | | | |
| Number Of Decimals: 2 | Number Of Decimals: 2 | | Minimum Value | c 0 | Max | kimum Value: 500 | |
| | Step Text | Step Link | Step Note Ar | iswer type | Required | Show Answer History | Default Answer |
| | Hot Water Flow Out | 2 | | lumber | 2 | e . | |
| | Number Of Decimals: 2 | | Minimum Value | : 0 | Max | simum Value: 100 | Step Visibility Rules: Show this |
| | step when Any of the following | | | | | | |
| | Step Link: 1 Number | /Answered Prev | ious Value | | | | |
| | Step Text | Step Link | Step Note An | wer type | Required | Show Answer History | Default Answer |
| | Cold Water Flow In | 3 | | umber | 2 | 2 | |
| | Number Of Decimals: 2 | | Minimum Value | e 0 | Max | kimum Value: 100 | Step Visibility Rules: Show this 🗣 |
| | | | | | | | |

- The status "Saving" and "Saved" will be indicated.
- Note: The time it takes to save the form will depend on the number of steps added.
- To verify that the form was saved successfully, close the Import tool, the new Form will appear in the list of forms of the selected Storage Group.

| For | n Designer Cold Salt 1 | Tank Form v. 0.00 (2 | Pages, 13 Step | is) | | | | | | | 8 | ۲ | × |
|-----|-------------------------------|----------------------|--|-------------|-------|---|-------------------|---------|-----------------------|----|-------|--------|---|
| ≡ | New Page New Step | | ext found in step " ty details found in | step "Plea: | se Co | ng 1" ntact Supervisor" on page "Re re a Picture:" on page "Readi | | | | | | | |
| , | ∧ Reading | | | | | | | | Ok | | | | |
| | Hot Water Flow Out | Number | @ (?) B | | - | Enter Form Description | | | | | | | |
| | Cold Water Flow In | Number | @ (?) E | | | | | | | | | h | |
| | Cold Water Flow Out | Number | ⊛ එම | | | ditional Information C | | | | | Unput | lished | |
| | Tempering Valve | Yes/No | *28] | | | ssociated Assets | | | | | | 0 | |
| | Please Contact | Show Message | @ 신 B | | Та | isks using this Form | | | | | | 0 | |
| | Please Take a Picture: | Take picture | @ C1 8 | | R | eport based on this Form | | | | | | 0 | |
| | Signature: | Signature | @ C1 8 | | V | ersion | | | | | | 0 | |
| | Reading 2 | | රු | | | sion Tracking Log | | | | | | | |
| 5 | Previous Level | Previous | ⊛එ≊ | | | me: Cold Salt Tank Form No ersion-Serial-Status | Published Show Al | Туре | Date | | | Log | |
| | Pump Flow | Number | @ 23 8 _ | | 0- | 8951-Not Published | Admin Solar | Created | 2019/11/21 03:52:18 1 | РМ | | | |
| | Botton Temperature | Number | වේස | | | | | | | | | | |
| | Comments: | Multi-Line Text | වේස | | | | | | | | | | |
| | Signature: | Signature | ම ෆි ම | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | Ψ | | | | | | | | | |

Note: The user must solve the validation errors before publishing.

- Critical Errors

If the errors appear at the top, this means that they are critical errors and the Form cannot be imported, they must be corrected in the csv file and repeat the process of loading the csv file again.







The possible critical errors that may appear in the validation process are listed below.

• **Empty column name** – The column name cannot be empty, and all column titles must match with the names shown in import columns in the import tool windows. All Column titles must remain in the English Language.

| | sport to CSV | _ | | | et Sheet | | | | | | | | | | | | | | | | | |
|----------|---------------------|------------------------|--------------------|---------------------|---------------|--------------------|--------------|--------------|----------------|-----------|------------------|---------|-------------------|-------------------|-----------|------------------|------------------|-----------------------|----------|-----------------|----------------|----------------|
| | Form Description | Visibility Default | Form Version ID | Form Version Log | Page Title | Show Page Title | Answer Type | Step Link | | Step Note | Step Required | Answer | Default Answer | Add Visibility | Number of | Minimum Value | Maximum Value | Number of Decimals | | List Options | Lookup Name | Lookup Show Vi |
| old Salt | | Visibility | | | | | | | | onep none | | | | | Cinco | | | | otep enn | options | | |
| ank Form | | Default1 | | | Reading | 1 Yes | Number | 1 | Level | | Yes | Vor | | | | | 0 50 | 0 | 2 | | | |
| | | Visibility | | | | | | | Hot Water | | 4 | | | | | | | | | | | |
| | | Default1 | | | | | Number | 2 | Flow Out | | | mpty cy | olumn n | amo | | | 0 10 | 0 | 2 | | | |
| | | Visibility | | | | | | | Cold Water | | _ | mpty c | //ummin | unic | | | | | | | | |
| | | Default1 | | | | | Number | | Flow In | | Y | | | | | | 0 10 | 0 | 2 | | | |
| | | Visibility | | | | | | | Cold Water | | _ | | | | - | | | | | | | |
| | | Default1 | | | | | Number | | Flow Out | | Yes | Yes | | 3 | | | 0 10 | 0 | 2 | | | |
| | | Visibility | | | | | | | Tempering | | | | | | | | | | | Radio, | | |
| | | Default1 | | | | | Yes/No | 5 | Valve | | Yes | No | | 4 | | | | | | OK,NOK | | |
| | | Visibility | | | | | Show | | | | | | | | | | | | | | | |
| | | Default1 | | | | | message | 6 | | | | | | 5 | | | | | | | | |
| | | Visibility | | | | | | | Please Take a | | | | | | | | | | | | | |
| | | Default1 | | | | | Take picture | 1 | Picture: | | Yes | | | | | | | | | | | |
| | | Visibility Default1 | | | | | | | | | | | | | | | | | | | | |
| | | Visibility | | | | | Signature | 8 | Signature: | | Yes | | | | | | | | _ | | | |
| | | Default1 | | | Reading | Mar | Previous | | Previous Level | | | | | | | | | | | | | |
| | | Visibility | | | Reading | 2 105 | Previous | , , | Previous Level | | | | | | | _ | | | - | | | |
| | | Default1 | | | | | Number | 10 | Pump Flow | | Yes | Yes | | | | | 0 10 | 0 | , | | | |
| | | Visibility | | | | | Humber | | Botton | | | 143 | | | | - · · · | | | • | | | |
| | | Default1 | | | | | Number | | Temperature | | Yes | Yes | | 10 | | | 0 24 | | 2 | | | |
| | | | | | | | | | - angeorature | | | | | | | | | | | | | |
| | | Visibility | | | | | Multi-line | | | General | | | | | | | | | | | | |
| | | Default1 | | | | | text | 12 | Comments: | Comments | No | No | | 11 | | | | | | | | |
| | | Visibility | | | | | | | | | | | | | | | | | | | | |
| | | Default1 | | | | | Signature | 13 | Signature: | | Yes | | | 11 | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |

• **Invalid column name** – The column name cannot be different from the default names in the template. Do not change the column title names.

| Exp | ort to CSV | | | Re | et Sheet | | | | | | | | | | | | | | | | | |
|----------|-------------|----------------------------------|------------|--------------|-----------|-----------|--------------|------|----------------|-----------|----------|---------|---------|------------|-----------|-----------|-------|-----------|-----------|---------|--------|----------------|
| | Form | | | Form Version | | Show Page | | Step | | | | Answer | Default | Add | Number of | Minimum | | Number of | | | Lookup | |
| orm Name | Description | Visibility Default Visibility | Version ID | Log | Title | Title | XXX | Link | Step Text | Step Note | Required | History | Answer | Visibility | Lines | Value | Value | Decimals | Step Link | Options | Name | Lookup Show Va |
| ank Form | | Default1 | | | Reading | Mar | Number | | | | | | | | | | 0 50 | | | | | |
| ank Porm | | Visibility | | | wearing . | i res | Number | | 'eve | | | | | | | - | 0 30 | | | | | |
| | | Default1 | | | | | Number | | 2 FION Inve | | | | | | | | 0 10 | | | | | |
| | | Visibility | | | | | Trumper | | Cole | alid colu | mn nan | ne | | | | - | | | | | | |
| | | Default1 | | | | | Number | | B Flov | | | | | | , | | 0 10 | | , | | | |
| | | Visibility | | | | | | | Cold Water | | | | | | - | | | | | | | |
| | | Default1 | | | | | Number | | Flow Out | | Yes | Yes | | 3 | 5 | | 0 10 | | 2 | | | |
| | | Visibility | | | | | | | Tempering | | | | | | | | | | | Radio, | | |
| | | Default1 | | | | | Yes/No | 1 | 5 Valve | | Yes | No | | 4 | 1 | | | | | OK,NOK | | |
| | | Visibility | | | | | Show | | | | | | | | | | | | | | | |
| | | Default1 | | | | | message | | 5 | | | | | 5 | 5 | | | | | | | |
| | | Visibility | | | | | | | Please Take a | | | | | | | | | | | | | |
| | | Default1 | | | | | Take picture | | 7 Picture: | | Yes | | | 5 | 5 | | | | | | | |
| | | Visibility | | | | | | | | | | | | | | | | | | | | |
| | | Default1 | | | | | Signature | 1 | 8 Signature: | | Yes | | | 7 | <u>'</u> | | | | _ | | | |
| | | Visibility | | | | | | | | | | | | | | | | | | | | |
| | | Default1 | | | Reading | Yes | Previous | | Previous Level | | | | | | <u> </u> | _ | | | _ | | | |
| | | Visibility Default1 | | | | | Number | | Pump Flow | | Yes | Yes | | | | | 0 10 | | | | | |
| | | Visibility | | | | | Number | | Botton | | res | res | | | 2 | - · · · · | 10 | | | | | |
| | | Default1 | | | | | Number | | 1 Temperature | | Yes | Yes | | 10 | | | 0 24 | | , | | | |
| | | Denout | | | | | - Controler | | remperature | | 140 | 14.0 | | | | | v 24 | · · | | | | |
| | | Visibility | | | | | Multi-line | | | General | | | | | | | | | | | | |
| | | Default1 | | | | | text | 12 | Comments: | Comments | No | No | | 11 | | 5 | | | | | | |
| | | Visibility | | | | | | | | | | | | | | | | | | | | |
| | | Default1 | | | | | Signature | 1 | B Signature: | | Yes | | | 11 | | | | | | | | |
| | | | | | | | - | | - | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |

• **Duplicate Column name –** There cannot be duplicate names in column names.





| | | _ | | | et Sheet | - | | | | | | | | | | | | | | | | |
|------------------|---------------------|------------------------|--------------------|---------------------|------------|--------------------|--------------|--------------|---------------------------|-------------|---------|-------------------|-------------------|-------------------|--------------------|------------------|------------------|-----------------------|-----------------------|------------------|----------------|----------------|
| | Form Description | Visibility Default | Form Version ID | Form Version Log | | Show Page Title | Answer Type | Step Link | Step Text | Step Text | | Answer History | Default Answer | Add Visibility | Number of Lines | Minimum Value | Maximum Value | Number of Decimals | Previous Step Link | List Options | Lookup Name | Lookup Show Va |
| d Salt k Form | | Visibility Default1 | | | Reading | Vor | Number | | Level | | Man Yes | Var | | | | | 500 | | 2 | | | |
| K POINT | | Visibility | | | neaoing. | L ICS | NUTIVE | | Hot Water | | 9 | | | | | - 1 | | , | 4 | | | |
| | | Default1 | | | | | Number | | Flow Out | | Ye | unligato | Column | | | | 100 | 0 | 2 | | | |
| | | Visibility | | | | | | | Cold Water | | DU | iplicate | Column | name | | | | | | | | |
| | | Default1 | | | | | Number | | Flow In | | Ye | | | | | | 100 | 0 | 2 | | | |
| | | Visibility | | | | | | | Cold Water | | _ | | | | - | | | | | | | |
| | | Default1 | | | | | Number | | Flow Out | | Yes | Yes | | 3 | | | 100 | | | _ | | |
| | | Visibility Default1 | | | | | Yes/No | | Tempering Valve | | Yes | No | | | | | | | | Radio, OK,NOK | | |
| | | Visibility | | | | | Show | | | | | | | | | | | | | | | |
| | | Default1 | | | | | message | 6 | | | | | | 5 | | | | | | | | |
| | | Visibility | | | | | | | Please Take a | | | | | | | | | | | | | |
| | | Default1 | | | | | Take picture | 7 | Picture: | | Yes | | | 5 | | | | | | | | |
| | | Visibility | | | | | | | | | | | | | | | | | | | | |
| | | Default1 | | | | | Signature | 8 | Signature: | | Yes | | | 7 | | | | | _ | | | |
| | | Visibility Default1 | | | Decelling. | | Previous | | Previous Level | | | | | | | | | | | | | |
| | | Visibility | | | Reading | z res | Previous | 3 | Previous Level | | | | | | | _ | | | - eres | | | |
| | | Default1 | | | | | Number | 10 | Pump Flow | | Yes | Yes | | 8 | | | 100 | | 2 | | | |
| | | Visibility | | | | | | | Botton | | | | | | | | | | | | | |
| | | Default1 | | | | | Number | 11 | Temperature | | Yes | Yes | | 10 | | | 240 | 0 | 2 | | | |
| | | Visibility | | | | | Multi-line | | | General | | | | | | | | | | | | |
| | | Default1 | | | | | text | 12 | Comments: | Comments | No | No | | 11 | , | | | | | | | |
| | | Visibility | | | | | | | Contraction of the second | Contraction | | | | | | | | | | | | |
| | | Default1 | | | | | Signature | 13 | Signature: | | Yes | | | 11 | | | | | | | | |
| | | | | | | | - | | - | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |

| | Valid Column Names | |
|--------------------|--------------------|---------------------|
| Form Name | Answer History | Date Default |
| Form Description | Default Answer | Show Message |
| Visibility Default | Add Visibility | Document Name |
| Form Version ID | Number of Lines | Alias |
| Form Version Log | Minimum Value | Formula |
| Page Title | Maximum Value | Instruction Message |
| Show Page Title | Number of Decimals | Scan Enter Manually |
| Answer Type | Previous Step Link | Scan Visible |
| Step Link | List Options | Scan Location Code |
| Step Text | Lookup Name | Scan Type |
| Step Note | Lookup Show Value | |
| Step Required | Lookup Options | |







• **Invalid Visibility Default Name** - Default Visibility template names must match with Default Visibility names created in the Form Tools area within the Storage Group.

| port to CSV | | | Rest | et Sheet | _ | | | | | | | | | | | | | | | | |
|---------------------|--|--|--|--|--|--|---|---|--|--|---|--|---|---|--|---|--|--|--|--|--|
| Form Description | | | | | | | | Step Text | Step Text | | | Default Answer | Add Visibility | Number of Lines | Minimum Value | Maximum Value | Number of Decimals | Previous Step Link | List Options | Lookup Name | Lookup Show Va |
| | Visibility | | | | | | | | | | | | | | | | | | | | |
| | Default1 | | | Reading 1 | Yes | Number | | | | Yes | Yes | | | | | 50 50 | 0 | 2 | | | |
| | | | | | | Number | 2 | Flow Out | | Yes | Yes | | | 1 | | 10 | o | 2 | | | |
| | Visibility existing Default1 Blank to | Visibility Default e Group, Leave use previous | t | | | Number | | | | Yes | Yes | | | | | 10 | o | 2 | | | |
| | Visibility row Visib Default1 | ility Default. | | | | Number | | | | Yes | Yes | | | | | 10 | o | 2 | | | |
| | Visibility Default1 | | | | | Yes/No | | | | Yes | No | | | | | | | | Radio, OK,NOK | | |
| | Visibility Default1 | | | | | | 6 | | | | | | | | | | | | | | |
| | Visibility Default1 | | | | | | | | | Yes | | | | | | | | | | | |
| | Visibility Default1 | | | | | Signature | 8 | Signature: | | Yes | | | | , | | | | | | | |
| | Visibility Default1 | | | | | vious | 9 | Previous Level | | | | | | , | | | | | 1 | | |
| | Visibility Default1 | | Invalid | Visibilit | y Default | | 10 | Pump Flow | | Yes | Yes | | | | | 10 | 0 | 2 | | | |
| | Visibility Default1 | | | Nume | | mber | | | | Yes | Yes | | 10 | | | 24 | 0 | 2 | | | |
| | Visibility | | | | | | | | General | | | | | | | | | | | | |
| | Visibility | | | | | | | | Comments | | No | | | | 2 | | | | | | |
| | Default1 | | | | | signature | 13 | signature: | | res | | | 1 | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | |
| | | Visibility Default Visibility Visibility Visibility Default1 Visibility Default1 | Visibility Default Visibility Description Visibility Usibility | Description Visibility Default Version ID Log Visibility Version ID Log Visibility Version Versi | Visibility Default Version D Lag Trie Visibility Default1 Visibility Visibility Default1 Visibility Default1 Visibility Visibility Default1 Visibility Default1 Visibility Default1 Visibility Default1 Visibility Visibility Default1 Visibility Default1 Visibility V | Visibility Use of the second billing of the second bill of the second bill of the second billing of the second bill of the second billing of the second billing of the second billing of the second billin | Visibility Default Version ID tog Title Name Visibility Default | Visibility Default Title Title Title Answer Type Link Visibility Default1 Image: Control of the second of t | Visibility Default visibi | Visibility Default User Title Title Title Answer Type Link Step Text Step Text | Valibility Description Valibility Construction ID Log Title Title Answer Type Link Step Text Step Text Required Visibility Default1 Image: Step Text Reading 1 Yes Number 1 Level Yes Visibility Default1 Image: Step Text Reading 1 Yes Number 1 Level Yes Visibility Default1 Image: Step Text Reading 1 Yes Number 1 Level Yes Visibility Default1 Image: Step Text Number 1 Cold Water Yes Visibility Default1 Image: Step Text Yes Cold Water Yes Visibility Default1 Yes Number 1 Flow Out Yes Visibility Default1 Yes Show Suparture: Yes Yes Visibility Default1 Image: Step Text Image: Step Text Yes Yes Visibility Default1 Image: Step Text Yes Yes | Visibility Description Visibility Description Title Answer Type Luk Step Text Required History Visibility Default Default1 • Reading 1 Ves Number 1 Level Yes Yes Visibility Default1 • Reading 1 Yes Number 1 Level Yes Yes Visibility Default1 • Reading 1 Yes Number 1 Level Yes Yes Visibility Default1 • I I I I I I I I I I I I I I I I I I I I | Vability Default Title Title Title Answer Type (ink Vability) Step Text Step Text Regime (ink Vability) Usbility Default1 Image: Comparison (ink) Reading 1 Ves Number 1. Level Yes Yes Visibility Default1 Image: Comparison (ink) Reading 1 Ves Number 1. Level Yes Yes Visibility Default1 Image: Comparison (ink) Number 1. Level Yes Yes Visibility Default1 Image: Comparison (ink) Number 1. Level Yes Yes Visibility Default1 Image: Comparison (ink) Number 1. Cold Water Yes Yes Visibility Default1 Image: Comparison (ink) Number 1. Provide (ink) Yes Yes Visibility Default1 Image: Comparison (ink) Image: Comparison (ink) Yes Yes Yes Visibility Default1 Image: Comparison (ink) Image: Comparison (ink) Yes Yes Yes Visibility Default1 Image: Comparison (ink) Image: Comparility Yes Yes <td< td=""><td>Valiability Description Valiability Construction ID Log Title Title Title Answer Type Unit Step Text Step Text Required History Asswer Valiability Usibility Default1 - Reading 1Yes Number 1 Level Yes Yes</td><td>Valiality Delay Image: Second Diality Image: Second Diality Image: Second Diality Second Diality<td>Description Visibility Default Version Di Log Title Naswer Type Link Step Text Requited History Answer Visibility Level Yes Name Answer Visibility Level Yes Ves Image: Name Visibility Usibility Default Image: Name 1 Image: Name 1 Image: Name Yes Yes Yes Image: Name 1 Image: Name Image: Name</td><td>Visibility Description Visibility of the product version (D) tog Tite Tite Answer Type (Init) Step Text Required History Answer Visibility (Init) Ubility Default version (D) tog Reading 1 Ves Number 1 (Level Yes Yes Init) Init)<</td><td>Visibility becarding Visibility visibility befault Log Title Title Answer Type Link Step Text Required History Answer Visibility Link Lines Value Value Decimals Visibility befault visibility visibility visibility befault visibility befault visibility befault visibility visibility visibility visibility befault visibility visibility visibility befault visibility visibility visibility</td><td>Visibility becarding Visibility becarding Visibility becarding<!--</td--><td>Visibility Default Under Title Title Title Title Name Step Text Reptort Reptor</td><td>Value Value Decimate Title Title Answer Type Inte Step Text Reptinte Answer Value Value Decimate Step Link Options Name Visibility </td></td></td></td<> | Valiability Description Valiability Construction ID Log Title Title Title Answer Type Unit Step Text Step Text Required History Asswer Valiability Usibility Default1 - Reading 1Yes Number 1 Level Yes Yes | Valiality Delay Image: Second Diality Image: Second Diality Image: Second Diality Second Diality <td>Description Visibility Default Version Di Log Title Naswer Type Link Step Text Requited History Answer Visibility Level Yes Name Answer Visibility Level Yes Ves Image: Name Visibility Usibility Default Image: Name 1 Image: Name 1 Image: Name Yes Yes Yes Image: Name 1 Image: Name Image: Name</td> <td>Visibility Description Visibility of the product version (D) tog Tite Tite Answer Type (Init) Step Text Required History Answer Visibility (Init) Ubility Default version (D) tog Reading 1 Ves Number 1 (Level Yes Yes Init) Init)<</td> <td>Visibility becarding Visibility visibility befault Log Title Title Answer Type Link Step Text Required History Answer Visibility Link Lines Value Value Decimals Visibility befault visibility visibility visibility befault visibility befault visibility befault visibility visibility visibility visibility befault visibility visibility visibility befault visibility visibility visibility</td> <td>Visibility becarding Visibility becarding Visibility becarding<!--</td--><td>Visibility Default Under Title Title Title Title Name Step Text Reptort Reptor</td><td>Value Value Decimate Title Title Answer Type Inte Step Text Reptinte Answer Value Value Decimate Step Link Options Name Visibility </td></td> | Description Visibility Default Version Di Log Title Naswer Type Link Step Text Requited History Answer Visibility Level Yes Name Answer Visibility Level Yes Ves Image: Name Visibility Usibility Default Image: Name 1 Image: Name 1 Image: Name Yes Yes Yes Image: Name 1 Image: Name Image: Name | Visibility Description Visibility of the product version (D) tog Tite Tite Answer Type (Init) Step Text Required History Answer Visibility (Init) Ubility Default version (D) tog Reading 1 Ves Number 1 (Level Yes Yes Init) Init)< | Visibility becarding Visibility visibility befault Log Title Title Answer Type Link Step Text Required History Answer Visibility Link Lines Value Value Decimals Visibility befault visibility visibility visibility befault visibility befault visibility befault visibility visibility visibility visibility befault visibility visibility visibility befault visibility visibility visibility | Visibility becarding Visibility becarding </td <td>Visibility Default Under Title Title Title Title Name Step Text Reptort Reptor</td> <td>Value Value Decimate Title Title Answer Type Inte Step Text Reptinte Answer Value Value Decimate Step Link Options Name Visibility </td> | Visibility Default Under Title Title Title Title Name Step Text Reptort Reptor | Value Value Decimate Title Title Answer Type Inte Step Text Reptinte Answer Value Value Decimate Step Link Options Name Visibility |

• Invalid Answer Type – The Response Type names must match with valid response types.

| Exp | port to CSV | | | Rese | et Sheet | | | | | | | | | | | | | | | | | |
|-------------------------------|-------------|--|------------|--------------|------------------|--------------|--------------------|----------|---------------------------|---------------------|--------|----------------|---------|------------|-----------|-------|---------|----------|-----------|------------------|--------|----------------|
| | Form | | Form | Form Version | | Show Page | | Step | | | Step | Answer | Default | Add | Number of | | Maximum | | Previous | List | Lookup | |
| rm Name Id Salt nk Form | Description | Visibility Default Visibility Default1 | Version ID | | Title Reading | Title Yes | Answer Type | | Step Text | Step Text | | History Yes | Answer | Visibility | Lines | Value | | Decimals | Step Link | Options | Name | Lookup Show Va |
| | | Visibility Default1 | | | | | Numbe Must b | r Type | Mater | 1 | | | | 1 | | | | | 2 | | | |
| | | Visibility Default1 | | | | | Number SoPlar | it answe | | Invalid A | Inswer | туре | | | | | | | 2 | | | |
| | | Visibility Default1 | | | | | Number | | Cold Wat | _ | Yes | Yes | | | | | | | 2 | | | |
| | | Visibility Default1 | | | | | Yes/No | | Tempering Valve | | Yes | No | | | | | . 100 | , | | Radio, OK,NOK | | |
| | | Visibility Default1 | | | | | Show | 6 | | | res | NO | | | | | | | | UK,NUK | | |
| | | Visibility Default1 | | | | | Take picture | | Please Take a Picture: | | Yes | | | | | | | | | | | |
| | | Visibility Default1 | | | | | Signature | | Signature: | | Yes | | | | , | | | | | | | |
| | | Visibility Default1 | | | Reading | 2 Yes | Previous | | Previous Level | | | | | | , | | | | | 1 | | |
| | | Visibility Default1 | | | | | Number | | Pump Flow | | Yes | Yes | | 8 | | | 100 | , | 2 | | | |
| | | Visibility Default1 | | | | | Number | | Botton Temperature | | | Yes | | 10 | | | | | 2 | | | |
| | | Visibility Default1 | | | | | Multi-line text | 12 | Comments: | General Comments | No | No | | 11 | | | | | | | | |
| | | Visibility Default1 | | | | | Signature | | Signature: | | Yes | | | 11 | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |

| | Valid Answe | r Types | |
|------------------|--------------|---------------|--------------|
| Short text | Show message | Time | Previous |
| Multi-line text | List | Date | Yes/No |
| Take picture | Signature | Scan Location | Instructions |
| Show document | Drawing | Lookup | |
| Number | Scan Code | Calculation | |





Forms Tab view – Version Information

• Select Show Versions Show Versions, to track all Forms.

| æ | ٩ | | Ē | • | 1.6 | | | | | | GoPlant Admin | _ | |
|-------------------------|------|----------------|-----------------------|-----------------|--------------|--------|----------|-------------|----------|----------|---------------|----------------|------|
| DASHBOARD | MANA | GER | REPORTS | ADMIN | | | | | | | Plant 1 | PLAN | Т |
| Helios Solar Plant 1 | « | Helios Forn | Solar / Pla ns For | nt 1 m Tools | Assets | Rounds | Tasks | External Ta | gs User | s User | Groups Pla | ant 1 Properti | es |
| Plant 2 | | New F | orm Sh | ow Versions | Import Forms | | | | | | | Q Sea | arch |
| | | | Nam | e | | | Rounds | Assets | Tasks | Reports | Version | | |
| | | | Q Sei | | | | Q Search | Q Search | Q Search | Q Search | Q Search | | |
| | | 6 | Ano | her Test Forn | 1 | | 1 | 0 | 0 | 1 | Version 1 | ත | |
| | | 6 | Pres | sure Reading | form | | 1 | 0 | 0 | 0 | Version 1 | ත | |
| | | 0 | Test | Form | | | 1 | 0 | 0 | 2 | Version 1 | ත | |

It will show in print version all the changes for each Form in the Storage Group.

| Form: Version log by Storage | Group. | | Name: | |
|--|-------------------------------|-------------|------------------------|------------------|
| Storage Group: FASQA / Max Description: Form Count: 7 | (/ QA Helios Solar Plant | | Date: | |
| Description: Form Count. 7 | | | Time: | |
| Toggle Show All Name: Air Cooling Condenser F | orm Published 🗆 Show All | | | |
| Version-Serial-Status | User | Туре | Date | Log |
| 8-5535-Published | Max Admin | Created | 2018/11/29 02:16:46 PM | *Auto Generated* |
| 8-5535-Published | Max Admin | Updated | 2018/11/29 02:17:00 PM | *Auto Generated* |
| Name: Cold Salt Tank Form Pub | lished 🗆 Show All | | | |
| Version-Serial-Status | User | Туре | Date | Log |
| 2-5339-Published | Admin Solar | Updated | 2018/11/16 09:29:00 AM | *Auto Generated* |
| 2-5339-Published | Admin Solar | Created | 2018/11/16 09:29:28 AM | *Auto Generated* |
| Name: Electrical Generator For | m Published 🗆 Show All | | | |
| Version-Serial-Status | User | Туре | Date | Log |
| 2-5340-Published | Admin Solar | Created | 2018/11/16 09:30:41 AM | *Auto Generated* |
| 2-5340-Published | Admin Solar | Updated | 2018/11/16 09:31:00 AM | *Auto Generated* |
| Name: Heat Exchanger Form P | ublished 🗌 Show All | | | |
| Version-Serial-Status | User | Туре | Date | Log |
| 5-5341-Published | Admin Solar | Created | 2018/11/16 09:31:56 AM | *Auto Generated* |
| 5-5341-Published | Admin Solar | Updated | 2018/11/16 09:32:00 AM | *Auto Generated* |
| Name: Heliostats Form Publishe | ed 🗆 Show All | | | |
| Version-Serial-Status | User | Туре | Date | Log |
| 6-6451-Published | Admin Solar | WorkingCopy | 2019/02/06 12:08:53 PM | *Auto Generated* |
| 6-6451-Published | Admin Solar | Save | 2019/02/06 12:08:57 PM | |
| 6-6451-Published | Admin Solar | Published | 2019/02/06 12:09:00 PM | |
| Name: Hot Salt Tank Form Pub | lished 🗆 Show All | | | |
| Version-Serial-Status | User | Туре | Date | Log |
| 2-5343-Published | Admin Solar | Updated | 2018/11/16 09:35:00 AM | *Auto Generated* |

To see individual Forms, click on the Version # hyperlink:





| | Name | Rounds | Assets | Tasks | Reports | Version | | |
|----------------|----------------------------|-----------|--------|----------|----------|-----------|---|--|
| | Q inserts | Q Seconds | Q | Q (1000) | Q Second | Q Second | | |
| í ə | Air Cooling Condenser Form | 2 | 2 | 1 | 2 | Xersion.8 | 0 | |
| 6 | Cold Selt Tank Form | 2 | 2 | 1 | 1 | Version.2 | 0 | |
| i ə | Electrical Generator Form | 2 | 2 | 1 | 1 | Version.2 | 0 | |
| 6 | Heat Exchanger Form | 2 | 2 | 1 | 2 | Version.5 | 0 | |
| i ə | Helestats.Form | 2 | 2 | 1 | 1 | Version,6 | 0 | |
| (0 | ttot Salt Tank Form | 3 | 2 | 1 | 1 | Version.2 | 0 | |
| 6 a | Steam Turbine Form | 2 | 2 | 3 | 1 | Version 5 | 0 | |

The Version Tracking print version of the selected Form is displayed.

| Form: Air Cooling Condenser Version: 8 Storage Group: FASQA / Maa Current State: Published | | | Name: Date: Time: | |
|---|--------------------------|---------|------------------------------------|------------------|
| oggle Show All Name: Air Cooling Condenser F | orm Published 🖾 Show All | | | |
| Version-Serial-Status | User | Туре | Date | Log |
| 2-5289-Archived | Admin Solar | Created | 2018/11/13 02:05:51 PM | *Auto Generated* |
| 2-5289-Archived | Admin Solar | Updated | 2018/11/13 02:06:00 PM | *Auto Generated* |
| 3-5290-Archived | Admin Solar | Updated | 2018/11/13 02:13:00 PM | *Auto Generated* |
| 3-5290-Archived | Admin Solar | Created | 2018/11/13 02:13:29 PM | *Auto Generated* |
| 3-5530- Deleted | Admin Solar | Updated | 2018/11/16 09:28:00 AM | *Auto Generated* |
| 4-5338-Archived | Admin Solar | Updated | 2018/11/16 09:28:00 AM | *Auto Generated* |
| 4-5338-Archived | Admin Solar | Created | 2018/11/16 09:28:10 AM | *Auto Generated* |
| 3-5530- Deleted | Admin Solar | Created | 2018/11/29 12:15:29 PM | *Auto Generated* |
| 5-5531-Archived | Max Admin | Updated | 2018/11/29 12:33:00 PM | *Auto Generated* |
| 5-5531-Archived | Max Admin | Created | 2018/11/29 12:33:14 PM | *Auto Generated* |
| 6-5532-Archived | Max Admin | Created | 2018/11/29 12:38:44 PM | *Auto Generated* |
| 6-5532-Archived | Max Admin | Updated | 2018/11/29 12:39:00 P Last Version | *Auto Generated* |
| 7-5533-Archived | Max Admin | Created | 2018/11/29 12:39:43 PM | *Auto Generated* |
| 7-5533-Archived | Max Admin | Updated | 2018/11/29 12:40:00 PM | *Auto Generated* |
| 8-5534-Archived | Max Admin | Updated | 2018/11/29 12:47:00 PM | *Auto Generated* |
| 8-5534-Archived | Max Admin | Created | 2018/11/29 12:47:22 PM | *Auto Generated* |
| 8-5535-Published | Max Admin | Created | 2018/11/29 02:16:46 PM | *Auto Generated* |
| 8-5535-Published | Max Admin | Updated | 2018/11/29 02:17:00 PM | *Auto Generated* |





Creating Rounds with Asset/Form or Form Elements [Admin, Editor]

Use the left navigation panel to view the hierarchical structure of your company's organization. Rounds are Storage Group specific and once created cannot be moved. Rounds may contain Assets which are unique and only exist in one Storage Group. Therefore any Rounds created at a Storage Group level can only be copied but cannot be moved.

| Helios Sola | ar / Plant 2 | | | | | | | |
|-------------|------------------|--------|--------|-------|---------------|-------|-------------|--------------------|
| Forms | Form Tools | Assets | Rounds | Tasks | External Tags | Users | User Groups | Plant 2 Properties |
| | | | | | | | | |
| New Round | ls Show Versions | | | | | | | Q Search |

• Select the Rounds Tab.

Note: The tab name is defined by the Super Admin (Admin role with user at the root Storage Group Level) in the Admin panel.

The Rounds page appears.

| New Round | ds Show Versions | | | | | Q Search | |
|-----------|--------------------------------------|----------|-----------|-------|------------|------------|---|
| | Name | Forms | Assets | Tasks | Version | | |
| B | 410 Building Route | <u>2</u> | <u>11</u> | 0 | Version 47 | en t | à |
| C 🔒 | 450 Building Route | 0 | <u>14</u> | 0 | Version 17 | e t | à |
| C 🔒 | ALPHA Round | 0 | 3 | 0 | Version 1 | e t | à |
| C 🔒 | Area 21 Route | 0 | 3 | 0 | Version 3 | c) t | à |
| B | COVID-19 Facility Entrance Screening | 1 | 0 | 0 | Version 1 | e t | à |
| C 🔒 | COVID-19 Screening | 2 | 0 | 0 | Version 3 | e t | à |
| C 🔒 | ETC Demo Round | 0 | <u>3</u> | 0 | Version 1 | en t | à |
| C 🔒 | Fire Extinguishers | 0 | 3 | 0 | Version 1 | ආ (| à |
| C 🔒 | IP Orange PM 1 | 1 | 0 | 0 | Version 1 | e t | à |

• Create a new Round by selecting the **New Rounds** button.

Note: The button name is defined by the Super Admin in the Admin panel.

The rounds designer window appears.





| Rounds Designer v 0 | | | | | 💾 😌 🗙 |
|-------------------------|-------------------------|------|------|------|-------|
| General Elements Review | | | | | |
| Round Information | | | | | |
| Name * | Enter the Rounds Name | | | | |
| Description | Enter Round Description | | | | |
| Description | Enter Round Description | | | | |
| | | | | | |
| Version Tracking Log | | | | | |
| Name: ??? 🗆 Show All | | | | | |
| Version-Serial-Status | | User | Туре | Date | Log |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

- Enter the Round name in Name (Required).
- Enter the Round description in **Description**.
- When Version Tracking for Rounds is NOT enabled on the Storage Group, the Version Tracking Log is displayed on the tab. Only the latest version information is displayed unless the "Show All" checkbox is selected.
- When Version Tracking for Rounds IS enabled on the Storage Group, the Version Tracking area is visible on the General Tab:

| unds Designer v. o | | | | | B | 0 | × |
|----------------------|-------------------------|--------|---------------------------|------|-----|---|---|
| General Element | s Review | | | | | | |
| Round Informatio | n | Versio | n Tracking | | | | |
| Name * | Enter the Rounds Name | | D Optional ID | | | | |
| Description | Enter Round Description | | Og Reason for char | nge | | | |
| ersion Tracking L | og | | | | | | |
| lame: ??? Show A | All | User | Туре | Date | Log | | |
| version senar status | | 0301 | Type | Date | Log | | |

- Enter the Round name in Name (Required).
- Enter the Round description in **Description**.
- Optional Enter the Version Tracking Id
- Optional Enter the Version Tracking Log Information.
- When Version Tracking is enabled, and the REQUIRED flag is set, the Version Tracking area displays the "Required" entry in Red and must be filled in before publishing.





| tounds Designer v. o | | | | | 🖺 🥹 🗙 |
|---|-------------------------|---------|------------------|------|-------|
| General Eleme | nts Review | | | / | |
| Round Informat | on | Version | Fracking Require | d | |
| Name * | Enter the Rounds Name | ID | Optional ID | | |
| Description | Enter Round Description | Log | Reason for ch | ange | |
| Version Tracking Name: ??? Show Version-Serial-Statu | All | User | Туре | Date | Log |
| | | | | | |
| | | | | | |
| | | | | | |

- Enter the Round name in Name (Required).
- Enter the Round description in **Description**.
- Optional Enter the Version Tracking Id.
- Enter the Version Tracking Log Information (Required).
- Select the **Elements** tab. The window to add your Assets and/or Forms to the Round appears. You can add any number of Assets along with Forms.

| Rounds Designer v. o | | | | 8 |) X |
|------------------------|-----------------|------------------|---------------------|------------------|-----|
| General Elements Revi | ew | | | | |
| Add a Asset Add Form | | | | | |
| Element Name | Associated Form | Scan Required | Element Required | Variants Value 1 | + |
| | | | Select All | Select All | |
| | | | | | |
| | | | | | |
| | N. 51 | te te Diseleu | | | |
| | No Elemer | nts to Display | | | |
| | | | | | |

• Add Form elements to the round by selecting the Add Form button.





The window to add Form elements appears.

| Associated Forms | × |
|--|-----|
| Select a Storage Group / Form | |
| ▲ Search Forms ➤ Helios Solar / Plant 1 | t - |
| Another Test Form Pressure Reading form Test Form Unused Form | |

• Add forms by selecting the desired forms in the round and select the **Add** button.

| Rounds Designer 🔩 0 | | | | 8 | e > | × |
|-------------------------|-----------------|----------------|------------|------------|------------|---|
| General Elements Review | | | | | | |
| Add a Asset Add Form | | | | | | |
| | | Scan | Element | Variants | | |
| Element Name | Associated Form | Required | Required | Value 1 | + | |
| | | | Select All | Select All | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | No Eleme | nts to Display | | | | |
| | | | | | | |

• Add Asset elements to the round by selecting the Add Asset button.





| Select a Storage Group / Asset | |
|--|---|
| ▲ Search Assets | × |
| Plant One | ~ |
| Air Cooling Condenser Dal1 | |
| Asset Management Vehicle One | |
| Calibration Station | |
| Centrifuge 1 | |
| Centrifuge 2 | |
| Centrifuge 3 | |
| Condenser Cooler | |
| Electrical Generator Dal1 | |
| Extinguisher 1 | |
| Heliostats Dal1 | |
| Hot Salt Tank Dal1 | |
| Plant One Asset | |
| Unique Tag for Asset with instructions | |

- Select the "+" to expand the element list.
- Select the elements to include. Note: The selected elements will be added to the right side of the window.
- Select the Add button once you are ready to add the desired elements to the round.

| Ge | neral Elements Review | | | | | |
|-----|--------------------------------|------------------------------|------------------|---------------------|------------------|---|
| Add | a Asset Add Form | | | | | |
| | Element Name | Associated Form | Scan Required | Element Required | Variants Value 1 | + |
| | | | | Select All | Select All | |
| ð | Air Cooling Condenser COND-101 | Air Cooling Condenser Form 🗸 | | | | Û |
| 0 | Cold Salt Tank CST-1 | Cold Salt Tank Form | | | | Î |
| Ø | Electrical Generator EG-1 | Electrical Generator Form | | | | Î |
| 9 | Heat Exchanger HX-103 | Heat Exchanger Form 🗸 | | | | Î |
| 9 | Heliostats | Heliostats Form 🗸 | | | | Î |
| 9 | Hot Salt Tank HST-1 | Hot Salt Tank Form 🗸 | | | | Î |
| Ele | ments | | | | | |

Note: For all Asset elements, select the proper associated form in the dropdown dialog.





| Ge | eneral Elements Review | | | | | |
|-----|--------------------------------|----------------------------|------|------------|------------|---------|
| ٩dd | a Asset Add Form | | | | | |
| | | | Scan | Element | Variants | |
| | Element Name | ement Name Associated Form | | Required | Value 1 | + |
| | | | | Select All | Select All | |
| Ð | Air Cooling Condenser COND-101 | Air Cooling Condenser Form | · · | | | |
| ð | Cold Salt Tank CST-1 | Cold Salt Tank Form | | | | Ô |
| ð | Electrical Generator EG-1 | Electrical Generator Form | ~ | | | Î |
| 9 | Heat Exchanger HX-103 | Heat Exchanger Form | ~ | | | Ô |
| ð | Heliostats | Heliostats Form | ~ | | | Î |
| ð | Hot Salt Tank HST-1 | Hot Salt Tank Form | ~ | | | â |

Optional: Select "Scan Required" option next to all asset elements that require enforced scanning. The Scan Required column is not available for Form Only Elements in the Round.
 Note: By enforcing the operator to scan an asset's barcode or QR Code (all devices) or NFC/RFID Tags (Android devices with option), the operator will only be allowed to collect data after a valid scan of that Asset is performed.

| Ge | eneral Elements Review | | | | | |
|-----|--------------------------------|----------------------------|------------------|---------------------|------------------|---|
| Add | l a Asset Add Form | | | | | |
| | Element Name | Associated Form | Scan Required | Element Required | Variants Value 1 | + |
| | | | | Select All | Select All | |
| Ð | Air Cooling Condenser COND-101 | Air Cooling Condenser Form | | | | â |
| 0 | Cold Salt Tank CST-1 | Cold Salt Tank Form | | | | î |
| 0 | Electrical Generator EG-1 | Electrical Generator Form | | | | Î |
| ð | Heat Exchanger HX-103 | Heat Exchanger Form 🗸 | | | | î |
| Ð | Heliostats | Heliostats Form 🗸 | | | Z | Ô |
| Ð | Hot Salt Tank HST-1 | Hot Salt Tank Form | | | | â |

• Optional: Select "Element Required." option that requires a completed the element before the Round can be completed. Elements that are required will force the operator to finish and commit the Round element before completing the entire Round.





| Ge | eneral Elements Review | | | | | | |
|-----|--------------------------------|----------------------------|---|------------------|---------------------|------------------|---|
| ٨dd | a Asset Add Form | | | | | | |
| | Element Name | Associated Form | | Scan Required | Element Required | Variants Value 1 | + |
| | | | | | Select All | Select All | |
| 9 | Air Cooling Condenser COND-101 | Air Cooling Condenser Form | ~ | | | | Ô |
|) | Cold Salt Tank CST-1 | Cold Salt Tank Form | ~ | | | | Î |
|) | Electrical Generator EG-1 | Electrical Generator Form | ~ | | | M | Ô |
| 3 | Heat Exchanger HX-103 | Heat Exchanger Form | ~ | | | | â |
|) | Heliostats | Heliostats Form | ~ | | | Z | â |
| 9 | Hot Salt Tank HST-1 | Hot Salt Tank Form | ~ | | | | î |

 Add the Variant name and select the elements desired for that variant. Variants define the Elements that are visible when the end user opens the Round on the device or website. The Variant allows a Round to have 4 different sets of Elements that display and are available for data entry.

Note: A Variant is a variation of a Round that enables or disables the Assets and Form elements such as Shift 1, Shift 2, Shift 3, or Shift 4. As an example, equipment checked in Shift 1 may not be checked in Shift 2. We allow you to select or deselect elements from each Variant based on the instance that is being completed. Variants may also be used for the status or state of the equipment to be checked. One Variant may be for "Running" and another for "Out of Service". The Variant allows one Round with typical Asset / Forms or Forms to be utilized 4 different ways. This reduces the need to create a new Round for every application.

| Ge | neral Elements Review | | | | | | |
|-----|--------------------------------|----------------------------|-----|----|------------------|------------------|-----|
| Add | a Asset Add Form | | | | | | |
| | Element Name | Associated Form | | | ement equired | Variants Value 1 | x + |
| | | | | Se | lect All | Select All | ١ |
| Ø | Air Cooling Condenser COND-101 | Air Cooling Condenser Form | ~ [| | | V | Ô |
| 0 | Cold Salt Tank CST-1 | Cold Salt Tank Form | ~ [| | | V | â |
| 6 | Electrical Generator EG-1 | Electrical Generator Form | ~ [| | | V | â |
| 0 | Heat Exchanger HX-103 | Heat Exchanger Form | ~ [| | | V | î |
| Ø | Heliostats | Heliostats Form | ~ [| | | V | Î |
| 0 | Hot Salt Tank HST-1 | Hot Salt Tank Form | ~ [| | | | Û |
| Ela | ments | | | | | | |

• Select the "+" button to add more variants to the round (maximum of 4).





Note: The user must name each variant and select the elements to be used within each.

| ounds Designer | v.0 | | | | | B | ۲ | × |
|----------------|--------|--------|--|--|--|---|---|---|
| General Ele | ements | Review | | | | | | |
| 🗌 Enable Rev | view | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

- Select the **Review** tab. The window to enable round review appears.
 - Note: Rounds can have either a single or dual review enabled for each round.
- Select the Enable Review option to define the review type and verification required.

| Rounds Designer v o | B | ۲ | × |
|--|---|---|---|
| General Elements Review | | | |
| ☑ Enable Review | | | |
| teview Type | | | |
| ⊛Single Step ⊖Dual Step | | | |
| veview Verification | | | |
| Password Confirmation Required No Password Required | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Note: "Single Step" review allows for a single reviewer to perform the review, where as a "Dual Step" review requires two reviewers to accept the round before the review status is considered complete.





| Rounds Des | igner ⊻ o | | | | | B | ۲ | × |
|---------------|---|---------------------------------------|--|--|--|---|---|---|
| General | Elements | Review | | | | | | |
| 🖾 Enabl | e Review | | | | | | | |
| Review Type | | | | | | | | |
| | ●Single Step ○Dual Step | | | | | | | |
| Review Verifi | cation | \backslash | | | | | | |
| | Password No Password | Confirmation Required ord Required | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

• Select the Review Type.

| Rounds Desig | iner v. o | | | | 6 |
|-----------------------|----------------------------|-----------------------|--|--|---|
| General | Elements | Review | | | |
| 🖾 Enable | Review | | | | |
| Review Type | | | | | |
| | ●Single Step ○Dual Step | | | | |
| Review Verific | | | | | |
| | O Password | Confirmation Required | | | |
| | 1 | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

• Select the Review Verification required.

Note: "Password Confirmation Required" enforces the reviewer(s) to re-enter their password as a "digital signature" providing a secure authentication for performing the review.





| Rounds Desi | gner 🗤 o | B | 8 | ; | 3 |
|---------------|--|---|---|---|---|
| General | Elements Review | | | | |
| 🖾 Enabl | e Review | | | | |
| Review Type | | | | | |
| | ● Single Step | | | | |
| | ODual Step | | | | |
| Review Verifi | | | | | |
| | Password Confirmation Required | | | | |
| | No Password Required | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | _ | | | 1 |

• Save and publish the Round.

Note: Once a round is published it will be available to all users that have access through the storage groups.

- To edit a round once published, you must create a "working copy" by selecting *()*, select the save icon when ready to save, and the publish icon to publish again. Only Published Rounds are available on the mobile device.
- Rounds Tab Version Tracking
 - Select Show Versions show Versions, to view all Round versions.

| * | Helios Solar | / Plant 2 | | | | | | | |
|---|--------------|---------------|------------------|--------|-------|---------------|-------|-------------|--------------------|
| | Forms | Form Tools | Assets | Rounds | Tasks | External Tags | Users | User Groups | Plant 2 Properties |
| | New Rounds | Show Versions | \triangleright | | | | | | Q Search |





It will show in print version all the changes for each Round in the Storage Group.

| Round: Version log by Storag | ge Group. | | Name: | |
|---|-----------------|---------|------------------------|------------------|
| Storage Group: FASQA / Max Description: Round Count: 8 | | | Date: | |
| | | | Time: | |
| Toggle Show All Name: Air Cooling Condenser R | ound 🗆 Show All | | | |
| Version-Serial-Status | User | Туре | Date | Log |
| 1-1543-Published | Admin Solar | Created | 2018/11/13 02:11:09 PM | *Auto Generated* |
| 1-1543-Published | Admin Solar | Updated | 2018/11/29 02:16:49 PM | *Auto Generated* |
| Name: Cold Salt Tank Round 🗌 | Show All | | | |
| Version-Serial-Status | User | Туре | Date | Log |
| 1-1546-Published | Admin Solar | Created | 2018/11/13 03:11:10 PM | *Auto Generated* |
| 1-1546-Published | Admin Solar | Updated | 2018/11/16 09:35:06 AM | *Auto Generated* |
| Name: Electrical Generator Rou | ind 🗆 Show All | | | |
| Version-Serial-Status | User | Туре | Date | Log |
| 1-1544-Published | Admin Solar | Created | 2018/11/13 02:39:46 PM | *Auto Generated* |
| 1-1544-Published | Admin Solar | Updated | 2018/11/16 09:30:43 AM | *Auto Generated* |
| Name: Heat Exchanger Round | Show All | | | |
| Version-Serial-Status | User | Туре | Date | Log |
| 1-1547-Published | Max Admin | Created | 2018/11/13 04:30:59 PM | *Auto Generated* |
| 1-1547-Published | Max Admin | Updated | 2018/11/16 09:31:58 AM | *Auto Generated* |
| Name: Helio Stats Round 🗌 Sho | w All | | | |
| Version-Serial-Status | User | Туре | Date | Log |
| 1-1548-Published | Max Admin | Created | 2018/11/13 04:57:10 PM | *Auto Generated* |
| 1-1548-Published | Max Admin | Updated | 2018/11/16 09:33:37 AM | *Auto Generated* |
| Name: Hot Salt Tank Round 🗌 S | Show All | | | |
| Version-Serial-Status | User | Туре | Date | Log |
| 1-1545-Published | Admin Solar | Created | 2018/11/13 03:08:22 PM | *Auto Generated* |
| 1-1545-Published | Admin Solar | Updated | 2018/11/16 09:35:06 AM | *Auto Generated* |

If you want see individual Rounds, you must click on blue version # hyperlink of the Round.

| | | | | | | | - | | _ |
|---------------|--------------------|--------|-------|---------|--------------|-----------|----|----|---|
| Inter Startin | Shan Margaret | | | | | | | ۹ | 2 |
| | Name | Assets | Forms | Tasks | Version | Published | | | |
| | Q team | R | Q | Q. part | 9 | Q | | | |
| 8 e 8 | 410 Building Route | 11 | 2 | 0 | Vitraion A7 | * | | - | 1 |
| 2 a | All Building South | 34 | 0 | 0 | Surature 3.2 | > ~ | | -8 | 1 |
| ₿ e % | ADD month | 0 | t. | 1. | sterator t | 4 | | 0 | 2 |
| e % | ALPHA Roand | 1 | R | 0. | Version 1 | × . | Φ. | 8 | 1 |
| 8 a | 60003-00008 | | - E | | Treasurer. | | | | |
| œ e | Ana 21 Martin | 3 | | 0 | terana.1 | 4 | | 8 | |
| | | | | | | | | | |

The Version Tracking print version of the selected Round is displayed.



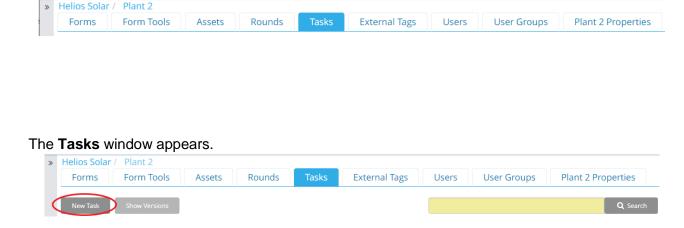


| Round: Operations Round Version: 3 Storage Group: FASQA / Ma Current State: Published | x / QA Helios Solar Plant | | Name: Date: Time: | | | |
|--|---------------------------|-------------|-------------------------|-------------|------------------|--|
| oggle Show All ame: Operations Round Sh | low All | | | | | |
| Version-Serial-Status | User | Туре | Date Li | ast Version | Log | |
| 1-1553-Archived | Admin Solar | Created | 2018/11/16 09:11:04 AM | / I | *Auto Generated* | |
| 2-1595-Archived | Max Admin | Created | 2018/11/30 09:00:44 AM | и | *Auto Generated* | |
| 1-1553-Archived | Admin Solar | Updated | 2019/02/06 12:08:59 PN | л | *Auto Generated* | |
| 2-1595-Archived | Max Admin | Updated | 2019/02/06 12:08:59 PN | ⊿ ♦ | *Auto Generated* | |
| 3-1866-Published | Admin Solar | WorkingCopy | 2019/02/11 01:37:53 PM | Л | | |
| 3-1866-Published | Admin Solar | Published | 2019/02/11 01:37:56 PM | л | | |

Creating and Scheduling Tasks [Admin, Editor]

Tasks are scheduled Round Variant(s) with a start time and an end time that will appear in the TASKS area on the mobile device for the assignees. They can be assigned to user groups or individual users and will only appear on the user's device once the scheduled start date/time has passed. Tasks may contain multiple Round Variants or one individual Round Variant. Tasks are created by first determining a start time, and then picking an end time and expiration time. Tasks are created in the time zone of the Storage Group. So, task dates and times must be chosen accordingly. A task may be created as a single instance or with a recurring schedule.

• Use the left navigation panel to view the hierarchical structure of your company's organization. As you add your tasks, use this panel to select a sub-group which will allow you to add tasks within it.



• Create a new task by selecting New Task. The New Task window appears.

Note: Only Round Variants can be scheduled and assigned as tasks. A Form must be included within a Round Variant before it is visible on the mobile device as well as available for scheduling with a Task.

Select the Tasks Tab.





| New Rounds Task Name | | | | | B | ٢ | × |
|-----------------------------|----------------------------|------|------|------|-----|---|---|
| General Rounds Assignees Sc | hedule Reminders | | | | | | |
| Task Information | | | | | | | |
| Name * | Enter the Task Name | | | | | | |
| Description | Enter the Task Description | | | | | | |
| | | | | | | | |
| Log Name: ??? Show All | | | | | | | |
| Version-Serial-Status | | User | Туре | Date | Log | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

- Enter the task name in **Name** (Required).
- Enter the task description in **Description**.
- When Version Tracking for Tasks is not enabled on the Storage Group, the Version Tracking Log is displayed on the tab. Only the latest version information is displayed unless the "Show All" checkbox is selected.
- Otherwise, if Version Tracking for Tasks is enabled on the Storage Group, the Version Tracking area is visible on the General Tab as seen below.

| eral Rounds | Assignees Schedule | Reminders | | | | | |
|--|----------------------------|-----------|-------------|-----------------|------|------|--|
| Task Information | n | | Version Tra | icking | | | |
| Name * | Enter the Task Name | | ID | Optional ID | | | |
| Description | Enter the Task Description | | Log | Reason for chan | ge | | |
| | | .4 | | | | ,ii, | |
| ersion Tracking | | | | | | | |
| ame: ??? 🗆 Show /ersion-Serial-Stat | | | User | Туре | Date | Log | |
| | | | | | | | |
| | | | | | | | |

- In this case you may also enter the Version Tracking ID and Log information.
- Select the **Rounds** tab (name of tab may differ depending on site admin's definition). The window to add your rounds to the task appears.



•



| New Rounds | a Task Name | | | | | | | | B | ۲ |
|------------|----------------------|-----------|----------|-----------|-----------------|---------|------|------|---|------|
| General | Rounds | Assignees | Schedule | Reminders | | | | | | |
| Add Rounds | | | | | | | | | | Q Se |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | No | o Elements to I | Display | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | _ | _ |
| | | | | | | | | | | |
| | - ((| ock by | 1 (| Add | Rounds | | | | | |

- Add the rounds to the task by selecting . The Add Rounds page appears.
- Select the rounds you want to add to your task. *Note: A specific round can only be added once.*

| | Task Name | | | | | | 8 | |
|------------|--------------|-----------|----------|-----------|-------------|------------------|-------|------|
| General | Rounds | Assignees | Schedule | Reminders | | | | |
| Add Rounds | | | | | | | Q Sea | arch |
| # | Name | | | | Description | Variants | | ī |
| 1 | Steam Turbin | e Round | | | | Shift1 | ~ | ī |
| | | | | | | Shift1 Shift2 | | |
| | | | | | | 51112 | | J |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

- Select the variant you want to add to your task.
- Select the **Assignees** tab. The window to add your assignees to your task appears.





| New Rounds Task Name | | 🖺 🥹 🗙 |
|--------------------------|------------------------|----------|
| General Rounds Assignees | Schedule Reminders | |
| Add Assignees | | Q Search |
| | | |
| | | |
| | No Elements to Display | |

• Add assignees to your task by selecting Add Assignees. The Add Assignees page appears.

| Filter F | Results | | |
|-----------------|---------|-------------------|--|
| Name | Туре | Storage Group | |
| Operator Solar1 | 4 | QA Helios Solar P | |
| Operator Solar2 | ▲ | QA Helios Solar P | |
| Operator Solar3 | ▲ | QA Helios Solar P | |
| Operators | *** | QA Helios Solar P | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

- Select the assignees you wish to assign to your task. Note: Both individual users and user groups can be added as assignees. Using user groups is recommended to simplify updating task assignees later.
- Create your schedule by selecting the **Schedule** tab. To create a task which only happens once, select **One time** as the **Type of Task**

| One time Recurring | |
|-------------------------|---|
| iii O | |
| iii O | |
| When task ends | |
| after task ends | |
| | |
| | Image: Second sec |





• Enter the task start and end times. Remember all times reflect the time zone of the currently selected storage group. The start time and end time must be in the future for the task to publish.

Note: The task will not appear on the website or mobile device until the start time has been reached.

- Optionally, enter the number of minutes, hours, or days after the end time you want the task to expire. By default, the task will expire at the end time.
 Note: The task will no longer appear on the website or mobile device if it has not been started once the expiration time has been reached. Any Task that was started, however, will remain open until completed or deleted.
- To create a recurring task, select **Recurring** as the **Type of Task**

| New Rounds Task Exa | mple Task | ۲ | × |
|-----------------------|------------------------------|---|---|
| General Rounds | Assignees Schedule Reminders | | |
| Type of task * | One time Recurring | | |
| Start time * | 2022/10/13 🗰 8:00 AM O | | |
| End time * | 2022/10/13 🗰 5:00 PM O | | |
| Expiration | When task ends | | |
| | ○ after task ends | | |
| Repeat every * | Interval 🔻 | | |
| Recurrence ends | No end date | | |
| enus | ○ After | | |
| | 🔿 Ву | | |
| | Preview | | |
| | | | |

- Select Start time, End time, and Expiration as described above.
- Define task recurrence by selecting a **Repeat every** option and entering the appropriate information.
- Define when you want the task to end by selecting a **Recurrence ends** option and entering the appropriate information.
- Review your task schedule by selecting Preview at the bottom of the page.
- Optionally, remind the assignees by selecting the **Reminders** tab and scheduling email notification to be sent.





| New Ro | New Rounds Task Example Task | | | | | | | | | |
|--------|--------------------------------|-----------------|----------|-----------|--|--|--|--|--|--|
| Gene | eral Rounds | Assignees | Schedule | Reminders | | | | | | |
| Send | Email Reminders | S | | | | | | | | |
| | At the start tir | me | | | | | | | | |
| | 4 Hour(s) | before end time | • | | | | | | | |
| | At the end tim | ie | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

- Press the B save icon to save your changes. It will turn yellow if changes have been made.
- Publish the task by selecting ^(C). Once a task is published it will be available to the assignees once the start time is reached.
- To edit a task once published, you must create a "working copy" by selecting the edit icon Select the save and publish icons when ready to re-publish.

When republishing Tasks, only existing Tasks that have NOT started will be updated. Any Task already created by the system where the start time has passed will NOT get modified with any changes. Mobile devices will continue to show the previous version of any Task where the start time has passed. GoPlant cannot modify a Task once it is available on the mobile devices.

When editing an existing task, if any changes to the schedule are made, the start time and end time must be updated to be in the future.

Tasks Tab – Version Tracking

• Select Show Versions Show Versions, to view all Tasks along with their current version.





| Demos / Forms | Helios Solar Power / Mojave Form Tools Assets Rounds Tasks External Tags | Users User | Groups M | ojave Properties | |
|------------------|--|------------|----------|------------------|------|
| New Tas | k Show Versions | | | Q Sea | irch |
| | Name | Assignees | Rounds | Version | - 1 |
| Ø 🔒 | Daily Helios Round | 0 | 1 | Version 1 | Û |
| Ø 🖨 | Daily Round | 1 | 1 | Version 1 | Û |
| Ø ə | Outside Plant - Day Shift | <u>6</u> | 1 | Version 1 | Û |
| C 🔒 | Outside Plant - Morning Shift | <u>5</u> | 1 | Version 6 | Û |
| C 🔒 | Outside Plant - Night Shift | <u>4</u> | 1 | Version 1 | Û |
| Ø 🔒 | Weekly Helios Safety Check | 1 | 1 | Version 2 | Û |
| B | Weekly Safety Inspection | 1 | 1 | Version 7 | Û |

It will show in print version all the changes for each Task in the Storage Group.

| Task: Version log by Stora Storage Group: FASQA / Description: Task Count: | Max / QA Helios Solar Plan | | | Di | ame: ate: me: | | | |
|--|----------------------------|----------|-----------|-----------|------------------------|------------------|------------------|--|
| ☐ Toggle Show All Name: Operations Task ☑ S | now All | | | | | | | |
| Version-Serial-Status | User | Туре | | Date | | Log | | |
| 1-1142-Published | Admin Solar | Created | | 2019/02/0 | I6 11:03:06 AM | New Storage Gro | up Task | |
| 1-1142-Published | Admin Solar | Publishe | d | 2019/02/0 | i6 11:03:10 AM | New Storage Gro | up Task | |
| 2-1143-Not Published | Admin Solar | Working | Сору | 2019/02/0 | i6 11:03:21 AM | | | |
| 2-1143-Not Published | Admin Solar | Save | | 2019/02/0 | 16 11:03:56 AM | Daily text added | to the Task Name | |
| Name: Weekly Operations T | ask 🖾 Show All | | | | | | | |
| Version-Serial-Status | User | | Туре | | Date | | Log | |
| 1-1144-Published | Admin Solar | | Created | | 2019/02/06 11:07:51 AM | | Added New Task | |
| 1-1144-Published | Admin Solar | | Published | | 2019/02/06 11:07:52 AM | | Added New Task | |
| | | | | | | | | |





If you want to see individual Tasks, you must click on the blue version # hyperlink of each Task.

| CASHBOARD | MANAGER | 1 G | | | | | | |
|--------------|----------------|-------------|----------|-----------------------|---------|--------------|---------------|-------|
| Helios Solar | Power / Moja | ve | | | | | | |
| Forms | Form Tools | Assets Roun | ds Tasks | Reports External Tags | Users | User Groups | Mojave Proper | rties |
| Na | ime | | | Assignee | s Items | Version | Publishe | bd |
| Q | Search | | | Q Search | Q Sear | ch Q Search | 1 | |
| | <u>8Z task</u> | | | | 1 | 1 <u>Ver</u> | sion 1 🗸 🗸 | 1 |
| | ntti's task | | | | 1 | 1 <u>Ver</u> | sion 1 | |
| CA 0 | dP task | | | | 2 | 1 Ver | sion 1 🗸 | 1 |

The Version Tracking print version of the selected Round is displayed.

| Task: Weekly Operations Task Version: 3 Storage Group: FASQA / Max / QA Helios Solar Plant | | | Name: Date: Time: | | |
|--|---------------|-------------|----------------------------------|----------------------|--|
| oggle Show All Jame: Weekly Operations Ta | sk 🖾 Show All | | | | |
| Version-Serial-Status | User | Туре | Date | Log | |
| 1-1144-Archived | Admin Solar | Created | 2019/02/06 11:07:51 AM | Added New Task | |
| 1-1144-Archived | Admin Solar | Published | 2019/02/06 11:07:52 Last Version | Added New Task | |
| 2-1146-Archived | Admin Solar | WorkingCopy | 2019/02/06 11:55:37 | | |
| 2-1146-Archived | Admin Solar | Save | 2019/02/06 11:56:20 AM | Moved deadline day | |
| 2-1146-Archived | Admin Solar | Published | 2019/02/06 11:56:21 AM | Moved deadline day | |
| 3-1147-Published | Admin Solar | WorkingCopy | 2019/02/06 11:57:27 AM | | |
| 3-1147-Published | Admin Solar | Save | 2019/02/06 11:57:49 AM | Moved Deadline Hours | |
| 3-1147-Published | Admin Solar | Published | 2019/02/06 11:57:50 AM | Moved Deadline Hours | |





Running Reports [All User Roles]

GoPlant provides over 50 standard preconfigured reports for Forms, Rounds, Tasks, Assets, and exception reporting. Along with the standard reports, user defined reports may be configured with the Report Designer. User defined reports pull information on a Form basis and are created within the Storage group where the required Assets and Forms reside. All reports available to the user may be accessed and run via the Reports tab on the website. Under that top level tab, there is a subtab for standard reports and one for user defined reports.



The standard reports tab lists all the preconfigured reports available in GoPlant as well as a description of each report.

| CASHBOARD | پچ MANAGER | REPORTS | 🔅 ADMIN | 1 | € | | | | GoPlant Admin Plant 2 | GPLANT | |
|---------------------------------|-----------------------------------|-----------------|------------|---|---|---|----------|-------------------------------|--------------------------|----------|--|
| Standard | Reports U | Jser Defined Re | eports | | | | | | | | |
| | | | | | | | | | | Q Search | |
| Name | | | Des | criptio | n | | | | | | |
| <u>GoPlant - Aler</u> | t Status | | List | alerts | filtered by | storage group, tin | ne ranį | ge, and acknowledgement | status | | |
| GoPlant - Asse | GoPlant - Asset Detail | | | | | List assets filtered by storage group and category | | | | | |
| GoPlant - Asse | GoPlant - Asset Status | | | | | List assets filtered by storage group, status, and category | | | | | |
| GoPlant - Asse | GoPlant - Asset Summary | | | | List assets filtered by storage group | | | | | | |
| GoPlant - Asse Configuration | et Vibration Measu | rement Point | List | vibrati | on and te | mperature limits c | onfigu | red for selected assets | | | |
| GoPlant - Asse | et Vibration Readin | i <u>gs</u> | List | vibrati | on and te | mperature reading | gs for s | selected assets filtered by t | ime range | | |
| GoPlant - Asse | et Vibration Spectru | um | Dis | play vib | oration sp | ectrums for selecte | ed asse | et measurement point filte | red by time range | 2 | |
| GoPlant - Asse | et Vibration Trend | | Gra | Graph selected measurement point readings over specified time interval. | | | | | | | |
| <u>GoPlant - CSV</u> | GoPlant - CSV External Tag Export | | | of tage | ged respo | nses filtered by sto | rage g | group, tag source, and time | frame formatted | as CSV | |
| <u>GoPlant - CSV</u> | GoPlant - CSV Historian Export | | | | List of tagged responses filtered by storage group, tag source, and time frame formatted as CSV | | | | | | |
| GoPlant - CSV | Response Export | | List | of resp | onses fil | ered by storage gr | oup an | nd time frame formatted a | s CSV | | |
| <u>GoPlant - CSV</u> | Round Response E | Export | List | of resp | onses fil | ered by storage gr | oup, ro | ound name, and time fram | e formatted as C | 5V | |
| | | | | | | | | | | | |

Standard reports are not associated with a particular storage group, so there is no storage group navigation on the standard reports tab.

To run a standard report, click on the report name and then follow these steps:





• Enter the appropriate criteria, based on the report type (i.e., Round Storage Group, Round Name, Date Range).

| Reports | × |
|------------------------------------|---|
| © Options | Round Summary View 6 |
| * Storage Group Path | □ - + 100% - search report Q - A > ≪ < Page |
| 843,844,845,732 | |
| * Round Storage Group | You must apply input values before the report can be displayed. |
| QA Helios Solar Plant Q | |
| * Round Name | |
| Air Cooling Condenser Round Q | |
| * Round End Date (Start) | |
| 2019-02-06 00:00:00 | - |
| * Round End Date (End) | |
| 2019-02-06 10:41:36 | |
| * Select Date Sort Order | |
| Descending | |
| O Ascending | |
| * Display Images | |
| O Yes | |
| • No | |
| * Include "Acknowledged" Responses | |
| O Yes | |
| • No | |
| | |
| / | |
| | |
| Apply Reset | |
| | < |

• Select Apply.

The report will appear on the right hand side of the screen.

| Options | | Round Sumn | nary View Data refreshe | d 2019-02-06 at 10:45:34 🕴 | 9 | | | |
|----------------------------------|---|------------|---|--|------------------------------------|--|-----------------------------------|---|
| * Storage Group Path | | 8. 8. | ♠ ♠ ∅ | | | - + 100% | search report | Q |
| 843,844,845,732 | | | Round Summary Rep | ort - View | | | | |
| * Round Storage Group | | | | Helios Solar Plant | | | | |
| QA Helios Solar Plant | Q | | Round Name: Air Round Description: | Cooling Condenser Round | | | | |
| * Round Name | | | • | | | 02/06/2019 10:40 AM | | |
| Air Cooling Condenser Round | Q | | | | Round Start Date Round End Date | 02/06/2019 10:40 AM 02/06/2019 10:41 AM | | |
| | | | Asset/Form | | Round Variant | Shift1 | | |
| * Round End Date (Start) | | | AIR COOLING CONDENSER COND-101 / AIR COOLING | Condensed Refrigerant Liquid Out | | 5.00 | | |
| 2019-02-06 00:00:00 | | | CONDENSER FORM | Cool Dry Entering Air | | 6.00 | | |
| | | | | Superheated Refrigerant Gas In | | 7.00 | | |
| ' Round End Date (End) | | | | Hot Dry Discharge Air Fan Speed Control | | 7.00 Ok | | |
| 2019-02-06 10:41:36 | | | | Refrigerant Pressure Sensor | | NOk | | |
| | | | | Ambient Temperature Sensor | | Ok | | |
| * Select Date Sort Order | | | | Rain/Sun Protection Hood | | Ok | | |
| Descending | | | | Comments: | | Sat Round | | |
| O Ascending | | | | Take a picture Signature: | | | | |
| | | | | orginature. | | | | |
| * Display Images | | | | | | Ann | | |
| O Yes | | | | | | | | |
| • No. | | | | | | | | |
| | | | Completed Form Comments | | | | | |
| Include "Acknowledged" Responses | | | Form Name | Note | Date / Time | Author | | |
| O Yes | | | | | | | | |
| No | | | Round Review Notes | | | | | |
| 0 110 | | | | | | | | |
| | | | Round End Date Rev N | ote | | Review Date Reviewe | и | |
| | | | | | | | | |
| | | | Page 1 | gend LoLo Lo Norr | nal Hi HiHi | State No answer | Report by GoPlant | |
| | | | | | | | | - |
| | | | | | | | | |

Reports formatted for printing, can be exported to CVS, Excel, PDF, formats by selecting the
export in the view.





| Reports | | | | | | | × |
|------------------------------------|---------------------------------|-------------|---|------------------|---------------------|---------|--------------|
| © Options | Round Summary View | ata refresh | ed 2019-02-06 at 10:45:34 👎 | Ø | | | |
| * Storage Group Path | 8. 8. 4 4 4 | | | | - + 100% | ▼ searc | h report Q |
| 843,844,845,732 | As PDF | arv Rep | oort - View | | | | |
| * Round Storage Group | As Excel As CSV | Air | Helios Solar Plant Cooling Condenser Round | | | | |
| | Round Description | on: | | | | | |
| * Round Name | | | | Round Start Date | 02/06/2019 10:40 AM | 1 | |
| Air Cooling Condenser Round Q | | | | Round End Date | 02/06/2019 10:41 AM | 1 | |
| * Deved Feed Date (Chevel) | Asset/Form | | | Round Variant | Shift1 | 4 | |
| * Round End Date (Start) | AIR COOLING C COND-101 / AIR | COOLING | Condensed Refrigerant Liquid Out | | 5.00 | | |
| 2019-02-06 00:00:00 | CONDENSE | RFORM | Cool Dry Entering Air | | 6.00 | 1 | |
| | | | Superheated Refrigerant Gas In | | 7.00 | - | |
| * Round End Date (End) | | | Hot Dry Discharge Air Fan Speed Control | | 7.00 Ok | - | |
| 2019-02-06 10:41:36 | 1 | | Refrigerant Pressure Sensor | | NOK | - | |
| | | | Ambient Temperature Sensor | | Ok | 1 | |
| * Select Date Sort Order | | | Rain/Sun Protection Hood | | Ok | 1 | |
| Descending | | | Comments: | | Sat Round |] | |
| O Ascending | | | Take a picture | | | - | |
| O Ascending | | | Signature: | | | | |
| * Display Images | | | | | Ann | | |
| O Yes | | | | | · V | | |
| No | | | | | | 1 | |
| | Completed Form C | omments | | | | | |
| * Include "Acknowledged" Responses | Form Name | | Note | Date / Time | Author | | |
| O Yes | | | | | | | |
| No | | | | | | | |
| 0 110 | Round Review Not | | | | | | |
| | Round End Date | Rev | Vote | | Review Date Review | wer | |
| | | | | | | | |
| | | | | | | | |
| | Page 1 | | egend LoLo Lo Non | mal Hi HiHi | State No answer | Report | by GoPlant ® |
| | | | | | | | |
| | _ | | | | | | |
| Apply Reset | < | | | | | | _ |
| | C. | | | | | | |

The user defined reports tab lists all user defined reports associated with the current storage group. Storage group navigation is managed via the sidebar in the same manner as the manager tab. For each report, the report's description and associated forms are listed.

| C | ASHBOARD | REPORTS | ⊥ ⊕ | | GoPlant User Plant 1 | |
|---|----------------|----------------|----------------------|----------------------------|--------------------------------|----------|
| » | Helios Solar / | Plant 1 | | | | |
| | Standard R | eports | User Defined Reports | | | |
| | | | | | | Q Search |
| | | | | | | |
| | Name | | D | escription | Source Form | |
| | | | ٩ | Search | Q Search | |
| | Example Repor | <u>t</u> | U | ser defined report example | Another Test Form Test Form | |
| | Example | <u>e Chart</u> | C | hart from example report | | |
| | Pressure Readi | ngs | P | ressure readings over time | Test Form | |

User defined reports are also invoked by clicking on the reports name and then providing any required input.





Linked Resources

On the Forms, Form Tools, Assets, Rounds, and Tasks panels, the count of resources linked to a particular resource is a hyperlink. To view the resources linked to that resource, clicking the hyperlink opens a panel which displays the list of resources associated with that resource.

| Linked Resources: Monthly Audit | | × |
|---------------------------------|-------------|-------------------|
| Forms | Assets | Tasks |
| Array Form | Boiler Pump | Another Task |
| Form with lookup | Main Array | Boilers Task |
| Pump Form | | Demo Task |
| | | Example of a Task |
| | | |
| | | Exit |

Moving the cursor over any of the linked resource names will display its storage group path.

| Linked Resources: Monthly Audit | | × |
|---------------------------------|-------------|-------------------------------------|
| Forms | Assets | Tasks |
| Array Form | Boiler Pump | Another Task |
| Form with lookup | Main Array | Boilers Ta Helios Solar / Plant one |
| Pump Form | | Demo Task |
| | | Example of a Task |
| | | |
| | | Exit |

External Tags

External Tags allow users to Manage links for reporting and exporting to other software systems. An External Tag in GoPlant maps or labels a Form response to a data point or label in an external software system. Tags are used for mapping responses per Asset Form or Form combinations to external tags that link to software historians, Asset management systems, or reporting software.

External Tags define a relationship between the Form Response, or a Response tied to an Asset. Because Forms may be reused against many Assets in GoPlant, the External Tag can be mapped to the Form Response for each Asset individually. Example Historian software packages are OSI Pi and





AspenTech IP 21. Numerical readings can be assigned the tags associated with these software systems allowing for easy file export or API query of the data. External Tags may also be shown on the Form when run from the desktop or mobile client. One External Tag can be assigned to display along with the step question for the response. For example, the Process and Instrumentation diagram label for a pressure gauge may be shown to the operator when they are answering a response question. When a Form is assigned to multiple Assets, each Asset Tag is displayed correctly when displayed to the end user.

External Tags – Tag Source Types

To begin with External Tags the Tag Sources must be defined. A Tag source is the 'type' designation for grouping tags together. The Tag source groups together all tag names that belong to one grouping or external software package link. Hundreds of tags may be grouped together for reporting and exporting purposes. GoPlant has the following predefined Tag Sources available for use:

- 1. Display Name
- 2. Honeywell DynAMo
- 3. Hach WIMS
- 4. AspenTech InfoPlus.21
- 5. JB Systems Mainsaver
- 6. IBM Maximo
- 7. OSIsoft Pi
- 8. Honeywell Uniformance Process Historian (PHD)

These Tag sources group the tags together for exporting via the API, Reports, and output to files. CSV output reports may be executed by Tag Source so that all data gathered from the operators can be easily exported by date range. The Tag Source also defines the type of tag displayed on the Form during data entry by the operator. GoPlant currently limits the number of Tag Sources to twenty (20). The predefined Display Name source may be used to display unique Pressure or Temperature tag names for step questions. For example, a tag label such as "PG-1234" could be displayed if the operator needs to verify what pressure gauge he should view. When a Form is attached to multiple assets, many times the same pumps will have different suction and discharge pressure gauge labels. In this case, the unique gauge label can be displayed to the operator when he answers the Form for readings on each individual pump.

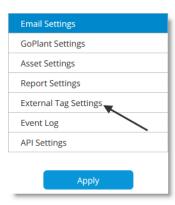




External Tag sources are defined by the Super Administrators for GoPlant (User has the Admin role at the root level storage group). The Tag sources are global and defined once for the GoPlant database (across all storage groups).



• Select the ADMIN button.



• Choose the 'External Tag Settings' from the left side menu.





| Тад Туре Та | g Display Name |
|-------------|----------------|
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

• The Tag Settings area is displayed. Currently the 'Import' function is disabled. If there is an immediate need to bulk import tags, please contact support and we will assist with this process.

| Tag Source Type 🛛 🖊 | Тад Туре | Tag Display Name |
|-------------------------|----------|------------------|
| MAXIMO | | |
| Tag Source Display Name | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| Add | | |

• The Tag Source Type field is a unique field that is used to export and query GoPlant for the tag data. This field will update your input to make the label all uppercase characters with no spaces. This change is required to keep a unique identifier used by IT departments and the API functions that will be used to query GoPlant for the response data.





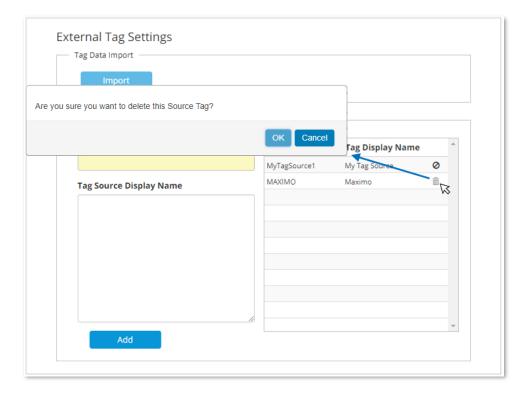
| ag Source Type | Тад Туре | Tag Display Name |
|------------------------|----------|------------------|
| MAXIMO | | |
| ag Source Display Name | | |
| maximo | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | 10 | |

• The Tag Source Display Name can be updated to whatever makes sense for end users. This Display name will be used when creating and assigning External Tags for this source.

| You Cannot Edit a Tag Source that is in Use | | ОК | |
|---|---|--------------|-------------------|
| External Tag Sources | | | |
| Tag Source Type | | Тад Туре | Tag Display Name |
| | | MyTagSource1 | My Tag Source 🖉 🖉 |
| Tag Source Display Name | | MAXIMO | Maximo 🛛 🖉 |
| | | | |
| | | | |
| Add | ĥ | | v |
| | | | |

Once created, if any tags are assigned to this Tag Source it cannot be deleted.





• If all tags are removed from the source, then you may delete the Tag Source Type via the trash can icon.

External Tags – Tag Management

LANT

External Tags are assigned via the External Tag Management Window. The Tag Management window allows editing both Form and Asset/Form External Tags. The Tag can be assigned to Form Steps to label the response for that question. Because Forms are created for multiple assets (to save time and handle consistency), the Asset is also required to ensure a unique assignment of the Tag. Only Published Forms are available for External Tag assignment. You cannot add External Tags to unpublished steps within a Form.

• Select the desired Storage Group using the navigation panel.

| Helios Solar Power Hojave | Helios Solar Power / Mojave Forms Form Tools Assets Rounds Tasks External Tags Users User Groups Mojave Properties | |
|-------------------------------|---|--|
| + Sonora | Enternal Tag Managar by Forms Enternal Tag Managar by Assets | |
| Select the 'Exte | al Tags' tab from the Manager. | |

• Tags are assigned at the Form or Asset Form relationship. A Form can have its own tags when no asset is assigned, as well as individual entries for each Asset that the Form is associated





with. For example, if a Form is assigned to 10 of the same pumps within a Plant, the form can have unique tags for each of the Suction Pressure readings for those pumps. When the specific Pump is added to the Round, the appropriate External Tag is associated with each reading taken.

| S External Tag Manager: Forms | × |
|---|---|
| External Tag Manager: Forms Select a Storage Group / Asset / Form SELECT O Assets @ Forms Gompany Name / Plant-1 / Unit1-1 Company Name / Plant-2 / Unit2-1 Company Name / Plant-3 / Unit3-1 Company Name / Plant-4 / Unit4-1 | × |
| | |
| Company Name / Plant-1 / Unit1-1 | 0 |

• Select 'External Tag Manager by Forms'. The external Tag manager window appears. The window is designed in a split format. After choosing the Asset / Form combination, the Tag editor scrolls up from the bottom of the screen. You can switch between 'Assets' and 'Forms' at any time in the Editor.

| External Tag Manager: Forms | | × |
|--|---|---|
| Select a Storage Group / Asset / Form | | |
| SELECT O Assets Forms | | |
| Search Forms Company Name / Plant-1 / Unit1-1 Company Name / Plant-2 / Unit2-1 Company Name / Plant-3 / Unit3-1 Company Name / Plant-4 / Unit4-1 | × | |
| | | |
| | | |
| | | |
| | | |
| Company Name / Plant-1 / Unit1-1 | | e |





• A list of the Storage Groups is displayed in Blue on the left side of the screen. Expand the storage group in order to locate the specific Form you will assign tags.

| External Tag Manager: Forms | |
|---|--|
| Select a Storage Group / Asset / Form | |
| SELECT ○ Assets ● Forms Company Name / Plant-1 / Unit1-1 UICAPA01 UICOMP01 UICOMP02 | |
| Company Name / Plant-1 / Unit1-1 | |

• Select the appropriate Form. The editor window will scroll up from the bottom of the screen.

| Tag Source Type | Tag Name | | Tag Description | Add |
|--------------------------|-----------------|---|---------------------------|--------|
| , , , | | | | |
| wailable External Tag | | | Drag External Tag to Step | |
| Tag Type | Tag Name | | ◆ PAGE - New Page | |
| Q Search Tag Type | Search Tag Name | × | Temp | Number |
| Maximo | maximotag01 | ŵ | Status | Yes/No |
| Maximo | maximotag02 | Û | | |
| Display Name | Temp01 | ŵ | | |
| Display Name | Temp02 | Û | | |
| | | | | |

• If there are any tags loaded for this Form, they will be displayed in the bottom left box area. The Form pages along with step questions, response type, and a drag/drop area appear on the lower right side of the screen.





| 🔈 External Tag Manager | External Tag Manager: Forms | | | | | |
|------------------------|-----------------------------|-----------------------|----|---------------------------|--------|--|
| 🔈 Company Name / Plar | nt-1 / U | nit1-1 / Form: U1CAPA | 01 | | ¥ | |
| Add Tag Display Name | : | Tag Name | | Tag Description | Add | |
| Available External Tag | | | | Drag External Tag to Step | | |
| Тад Туре | | Tag Name | | ✓ PAGE - New Page | | |
| Search Tag Type | × | Search Tag Name | × | Temp | Number | |
| Maximo | | maximotag01 | ŵ | Status | Yes/No | |
| Maximo | | maximotag02 | ŵ | | | |
| Display Name | | Temp01 | ŵ | | | |
| Display Name | | Temp02 | ŵ | | | |
| | | | | | | |

• At the top, Tags can be added for this Form (Add Tags section). Choose the Tag Source from the dropdown list. To create a new tag, simply enter both the tag name and optionally a Tag Description. Press the blue "Add" button to add the tag.

| 💊 External Ta | ag Manager: Forms | | | | × |
|---------------------------|---------------------------------|-------------------------------|-----|---------------------------|--------|
| 🏷 Company | Name / Plant-1 / Ur | nit1-1 / Form: U1CAPA | .01 | | • |
| | Fag Source Type Display Name | Tag Name | | Tag Description | Add |
| Available E | External Tag | | | Drag External Tag to Step | |
| Tag Type Q Search Tag | ag Type | Tag Name Q Search Tag Name | × | ♥ PAGE - New Page Temp | Number |
| Maximo | | maximotag01 | ŵ | Status | Yes/No |
| Maximo | | maximotag02 | ŵ | | |
| Display Na | ame | Temp01 | ŵ | | |
| Display Na | ame | Temp02 | ŵ | | |
| | | Temperature 2 | | | |

• Available Tag area: This area shows the tags that are available for assignment to the Form Step questions. If you hover over the tag, the description will appear in a tool text window.



| 🏷 Externa | l Tag Manager: Form | 5 | | | × |
|------------|---------------------------------|-------------------------------|---|---------------------------|--------|
| 🏷 Compai | ny Name / Plant-1 / U | nit1-1 / Form: U1CAPA01 | | | • |
| Add Tag | Tag Source Type Display Name | Tag Name | | Tag Description Q | Add |
| Availabl | e External Tag | | | Drag External Tag to Step | |
| Can Search | e h Tag Type 🗶 | Tag Name Q Search Tag Name | × | ♥ PAGE - New Page Temp | Number |
| Maxim | 0 | maximotag01 | Û | Status | Yes/No |
| Maxim | 0 | maximotag02 | Û | | |
| Display | / Name | Temp01 | Û | | |
| Display | / Name | Temp02 | ŵ | | |
| | | | | | |

Tags may be deleted from here by clicking on the Trash can icon

| Sexternal Tag Manager: Fo | orms | | × |
|---|------------------------------------|---------------------------|--------|
| Scompany Name / Plant-1 | / Unit1-1 / Form: U1CAPA01 | | + |
| Tag Source Type Add Tag Display Name | Tag Name | Tag Description Q | Add |
| Available External Tag | | Drag External Tag to Step | |
| Tag Type Q Search Tag Type | Tag Name X Q Search Tag Name | ★ PAGE - New Page Temp | Number |
| Maximo Maximo | maximotag01 maximotag02 | D Status D | Yes/No |
| Display Name Display Name | Temp01 Temp02 | ů ů | |
| Stopicy Hume | (chipot | | |
| | | | |
| | | | |
| | | | |
| · · · · · · · · · · · · · · · · · · · | | | |

• Search windows are available to quickly locate tags.

SKF®





| 🔈 External Tag Manager | : Forms | | | | | × |
|---|------------------|--------------------------|-----|---------------------------|-----------------------|--------|
| 🔈 Company Name / Plar | nt-1 / Unit1-1 / | Form: U1CAPA | 01 | | | • |
| Tag Source Type Add Tag Display Name | · | Tag Name | | Tag Description | Add | |
| Available External Tag | | | | Drag External Tag to Ste | p | |
| Tag Type Q Search Tag Type | Tag Na | me ch Tag Name | × | ♥ PAGE - New Page Temp | | Number |
| Maximo | maxin | notag02 | â 📈 | Maximo Display Name | maximotag01 Temp01 | |
| Display Name | Temp |)2 | Û | Status | rempor | Yes/No |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

• The 'Drag External Tag to Step' area displays each Page of the Form along with the steps. While each step is shown, not all steps are available for adding an External Tag. Pictures, Drawings, and other step type items are not available. All steps will be shown in the list, but you will not be able to assign a tag to a Step item that is invalid.





Managing Tasks [Admin, Editor]

Managing tasks in GoPlant can be done through both the Task Management and Task History widgets. These widgets give the user information about the tasks, to include their status and percentage complete. GoPlant allows users to select tasks to see more details specific to the task (i.e., assignees, status, revoke/unrevoked, date completed, etc...). All tasks that have been synced with the server will show accurate details of status and completion of the task event (i.e., tasks completed on mobile device in an off-network mode, will not display the current status until the device is in-network and synced with the server).

Task Definitions:

- **Tasks:** *Tasks* consist of Round Variant(s) that have a start time, an end time, and an expiration date. Tasks created in GoPlant contain *Task Events*.
- **Task Events:** *Task Events* are individual start times for the Task. Recurring Tasks have multiple Task Events for each new start time for the Task. Task Events within a task contain individual *Task Assignments*.
- Task Assignments: Task Assignments are the individual assignments per assignee for each Round Variant(s) within the Task Event. If a Task has 4 Round Variants and 2 Assignees, there are 8 Assignment records – 4 Round Variants for Assignee #1 and 4 round Variants for Assignee #2.
- Task events are defined by the following status:
 - a. In Progress: A task will show this status at the start time (defined in task).
 - b. Completed: Completed tasks are those completed by at least one of the assignees.
 - c. Late: Tasks are considered late when the task is incomplete and the task end time has passed (any task that has been started will remain in the Late status until it is either deleted or completed by one of the assignees).
 - d. Expired: Expired tasks are incomplete (never started) tasks that have passed the expiration time (defined in task).
 - e. Revoked: Admin users have the ability to revoke a task that has not yet expired.
 - f. Unrevoke: Admin users have the ability to unrevoke a revoked task.





• Select the Manage Dashboard Widgets icon to see a list of available dashboard widgets.

| Manage Dashboard Widgets | |
|--------------------------|-----------|
| Start a Round | D Overt 1 |
| E Round Draft | Chart 2 |
| Task Assignments | D Own3 |
| Completed Rounds | Chart 4 |
| Completed Forms | Chart 5 |
| Aly Notifications | |
| S Type Management | |
| Task History | |
| | heely |

• Add the Task Management and Task History widgets to your dashboard through the Manage Dashboard Widgets icon.

The Task Management and Task History widgets will appear.

| | Completed On Time | Completed Late | Not Completed |
|---|-----------------------|---------------------|---------------|
| Max/ QA Helios Solar Plant/Monthly Task | 0% | 100% | 0% |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| isk Management | | | e (|
| | End Time | Time to end time (H | |
| ask Management tsk Name 022.1 soc 2022.1 soc CHILD 4/TASK 2022.1 soc CHILD 4 - Central Time | End Time 10/12/202 | | |





Task Management Widget

The Task Management widget allows the user to view a list of task events and provides the user with the remaining time before the end time and current status. The widget displays one row per Task Event with a query for the current day from 12:00:00AM to 11:59:59PM for all task events with a "start time <= today AND end time >= today".

- a. Task Name: displays task name for each task event.
- b. End Time: displays date/time stamp of task event end time (as defined in task).
- c. *Time to end time:* displays the time in hours/minutes until the end time. Time is displayed in HH:mm format with "-" displayed prior to *time to end time* when the task event end time has passed. If the task event has been completed, no value will be displayed.
- d. Status: displays the current status of the task event.

| Task Management | | | <i>2</i> Q |
|---|--------------------|--------------------------|-------------|
| Task Name | End Time | Time to end time (HH:mm) | Status |
| Helios Solar Power/ Mojave/Weekly Safety Inspection | 2022/10/10 4:05 AM | -09:53 | Late |
| Helios Solar Power/ Mojave/Weekly Outside Plant Task | 2022/10/10 1:00 PM | 00:01 | On Time |
| Mojave/ Demo Montreal/Inspection zone 1 | 2022/10/10 2:00 PM | 01:01 | On Time |
| Helios Solar Power/ Mojave/Daily Helios Round | 2022/10/10 4:00 PM | 03:01 | On Time |
| Helios Solar Power/ Mojave/Weekly Outside Plant Task | 2022/10/11 1:00 PM | 24:01 | On Time |
| Helios Solar Power/ Mojave/Weekly Outside Plant Task | 2022/10/12 1:00 PM | 48:01 | On Time |
| Helios Solar Power/ Mojave/Weekly Outside Plant Task | 2022/10/13 1:00 PM | 72:01 | On Time |
| Helios Solar Power/ Mojave/Weekly Helios Safety Check | 2022/10/14 8:55 AM | 92:56 | On Time |
| Helios Solar Power/ Mojave/Weekly Outside Plant Task | 2022/10/14 1:00 PM | 96:01 | On Time |
| Mojave/ Demo Montreal/Inspection zone 3 | 2022/10/14 2:00 PM | 97:01 | Not Started |
| Mojave/ Demo Montreal/Inspection zone 2 | 2022/10/14 4:00 PM | 99:01 | Not Started |

- Select the browse icon to go to the Task Event Browser to see a list of all task event records for the current day.
- Optional: Select a specific task event row on the Task Management widget to view the details for only that task.

The Task Event Browser page will appear.





| Task Event Browser End Date: | Today 🗸 | | | | Count: 12 |
|------------------------------|----------------------------|---------------------|--------------------|----------|-----------|
| k Management | | | | | |
| fask Name | Storage Group | Start Time | End Time | Status | Revoked |
| a fearch | Q South | Q Search | Q fearth | Q Search | Q Search |
| Weekly Safety Inspection | Helios Solar Power/ Mojave | 2022/10/05 4:05 AM | 2022/10/10 4:05 AM | Late | Revoke |
| Neekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/10/05 1:00 PM | 2022/10/10 1:00 PM | On Time | Revoke |
| nspection zone 1 | Mojave/ Demo Montreal | 2022/10/10 10:00 AM | 2022/10/10 2:00 PM | On Time | Revoke |
| aily Helios Round | Helios Solar Power/ Mojave | 2022/10/10 8:00 AM | 2022/10/10 4:00 PM | On Time | Revoke |
| Veekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/10/06 1:00 PM | 2022/10/11 1:00 PM | On Time | Revoke |
| Veekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/10/07 1:00 PM | 2022/10/12 1:00 PM | On Time | Revoke |
| Veekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/10/08 1:00 PM | 2022/10/13 1:00 PM | On Time | Revoke |
| Veekly Helios Safety Check | Helios Solar Power/ Mojave | 2022/10/09 8:55 AM | 2022/10/14 8:55 AM | On Time | Revoke |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/10/09 1:00 PM | 2022/10/14 1:00 PM | On Time | Revolue |

Optional: Filter on Task Name, Storage Group, Start Time, End Time, Status, and Revoked columns.

| k Management | | | | | |
|---------------|----------------------------------|---------------------|---------------------|-------------|-----------|
| ask Name | Storage Group | Start Time | End Time | Status | Revoked |
| Search | Q Plant/ East Side | Q Search | Q Search | Q Search | Q. Search |
| Operator Task | QA Helios Solar Plant/ East Side | 10/12/2022 12:00 AM | 10/12/2022 4:00 AM | Expired | |
| Operator Task | QA Helios Solar Plant/ East Side | 10/12/2022 8:00 AM | 10/12/2022 12:00 PM | Expired | |
| Operator Task | QA Helios Solar Plant/ East Side | 10/12/2022 4:00 PM | 10/12/2022 8:00 PM | Not Started | Revoke |

Optional: Revoke a scheduled task event by selecting "Revoke". The user may also Unrevoke a previously revoked task.

• Select a task to view the details for that specific task event.

The Task Event Details page will appear.

| tions | | | | |
|---|-----------|------------|--------------|------------------|
| Task Operations Task Startline 2019/02/06 07:00:00 PM Deadline 2019/02/07 07:00:00 AM | | | | |
| ssignment lound/Variant | Assignees | Status | Completed By | Revoke Option |
| Search | Search | Q Search | Q Search | Q Search |
| iteam Turbine Round \ Shift1 | 1 | Incomplete | | Revoke |
| Air Cooling Condenser Round \ Shift1 | 1 | Incomplete | | Revoke |
| ectrical Generator Round \ Shift1 | 1 | Incomplete | | Revoke |
| lot Salt Tank Round \ Shift1 | 1 | Incomplete | | Revoke |
| Cold Salt Tank Round \ Shift1 | 1 | Incomplete | | Revoke |
| Heat Exchanger Round \ Shift1 | 1 | Incomplete | | Revoke |
| Helio Stats Round \ Shift1 | 1 | Incomplete | | Revoke |
| | | | | |

• Select the task assignment round variant to view the task assignment details.





The Task Assignment Details page will appear.

| Task Assign | nment Details | |
|--|---|-----------------------|
| ptions | | |
| Task Startline Deadline Round/Variant Status | Operations Task Daily 2019/02/06 07:00:00 PM 2019/02/07 07:00:00 AM Steam Turbine Round \ Shift1 Incomplete | |
| Assignee | | Storage Group |
| Q Search | | Q Search |
| Admin Solar | | QA Helios Solar Plant |
| | | 1 Elements |
| | | |
| | | |
| | | |
| | | |
| | | |

Task History Widget

The Task History widget allows the user to view a list of combined task events and provides the user with a percentage of tasks completed and/or late. The widget displays one row per Task Event name (combines all task events with the same name) with a query from "Today" at 11:59:59 PM including the last 2 weeks.

- a. *Task Name:* displays task name for each task (combines the task events of the same name).
- b. # Completed on Time: displays percent of tasks for past 2 weeks completed prior to the end time (percent is number of completed on time over past 2 weeks divided by the number of total tasks). Color is green if over 0%, otherwise no color is displayed).
- c. *# Completed Late:* displays percent of tasks for past 2 weeks completed after end time and/or expired time (percent is number of completed late divided by the number of total tasks). Color is yellow if over 0%, otherwise no color is displayed).
- d. *# Not Completed:* displays percent of tasks for past 2 weeks that are still in progress, never started, revoked, or expired (percent is number of not completed divided by the number of total tasks). Color is red if over 0%, otherwise no color is displayed).





| Task History | | | <i>2</i> Q | × |
|---|-------------------|----------------|--------------|---|
| Task Name | Completed On Time | Completed Late | NotCompleted | |
| Max/ QA Helios Solar Plant/Monthly Task | 0% | 100% | 0% | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

• Select the browse icon to go to the Task Event Browser to see a list of all task event records for the past 2 weeks.

The Task Event Browser page will appear.

| Task Event Browser End Date: Last | 14 Days 👻 | | | | Count: 77 😴 🗙 |
|-----------------------------------|----------------------------|---------------------|--------------------|-----------|---------------|
| Task Name | Storage Group | Start Time | End Time | Status | |
| Q Search | Q. Search | Q Search | Q Search | Q. Search | |
| Inspection zone 2 | Mojave/ Demo Montreal | 2022/09/26 4:00 PM | 2022/09/30 4:00 PM | Expired | |
| Generic Task | Alpha/ Helios Solar Power | 2022/09/30 7:05 AM | 2022/09/30 5:05 PM | Expired | |
| Scheduler Test 2 | Mojave/ Demo Montreal | 2022/08/31 6:00 PM | 2022/09/30 6:00 PM | Expired | |
| Scheduler Test 3 | Mojave/ Demo Montreal | 2022/09/30 3:00 PM | 2022/09/30 9:00 PM | Expired | |
| Scheduler Test 3 | Mojave/ Demo Montreal | 2022/09/30 9:00 PM | 2022/10/01 3:00 AM | Expired | |
| Scheduler Test 3 | Mojave/ Demo Montreal | 2022/10/01 3:00 AM | 2022/10/01 9:00 AM | Expired | |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/09/26 1:00 PM | 2022/10/01 1:00 PM | Expired | |
| Scheduler Test 3 | Mojave/ Demo Montreal | 2022/10/01 9:00 AM | 2022/10/01 3:00 PM | Expired | |
| Scheduler Test 3 | Mojave/ Demo Montreal | 2022/10/01 3:00 PM | 2022/10/01 9:00 PM | Expired | |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/09/27 1:00 PM | 2022/10/02 1:00 PM | Expired | |
| Weekly Safety Inspection | Helios Solar Power/ Mojave | 2022/09/28 4:05 AM | 2022/10/03 4:05 AM | Expired | |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/09/28 1:00 PM | 2022/10/03 1:00 PM | Expired | |
| Inspection zone 1 | Mojave/ Demo Montreal | 2022/10/03 10:00 AM | 2022/10/03 2:00 PM | Expired | |

Optional: Filter on Task Name, Storage Group, Start Time, End Time, and Status columns.

| Task Event Browser End Date: La | ist 14 Days 🔻 | | | | Count: 77 🤁 |
|---------------------------------|----------------------------|--------------------|--------------------|----------|-------------|
| Task Name | Storage Group | Start Time | End Time | Status | |
| Q Search | Q Helios Solar Power/ | Q Search | Q Search | Q Search | |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/09/26 1:00 PM | 2022/10/01 1:00 PM | Expired | |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/09/27 1:00 PM | 2022/10/02 1:00 PM | Expired | |
| Weekly Safety Inspection | Helios Solar Power/ Mojave | 2022/09/28 4:05 AM | 2022/10/03 4:05 AM | Expired | |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/09/28 1:00 PM | 2022/10/03 1:00 PM | Expired | |
| Daily Helios Round | Helios Solar Power/ Mojave | 2022/10/03 8:00 AM | 2022/10/03 4:00 PM | Expired | |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/09/29 1:00 PM | 2022/10/04 1:00 PM | Expired | |
| Daily Helios Round | Helios Solar Power/ Mojave | 2022/10/04 8:00 AM | 2022/10/04 4:00 PM | Expired | |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/09/30 1:00 PM | 2022/10/05 1:00 PM | Expired | |
| Daily Helios Round | Helios Solar Power/ Mojave | 2022/10/05 8:00 AM | 2022/10/05 4:00 PM | Expired | |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/10/01 1:00 PM | 2022/10/06 1:00 PM | Expired | |
| Daily Helios Round | Helios Solar Power/ Mojave | 2022/10/06 8:00 AM | 2022/10/06 4:00 PM | Expired | |
| Weekly Helios Safety Check | Helios Solar Power/ Mojave | 2022/10/02 8:55 AM | 2022/10/07 8:55 AM | Expired | |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/10/02 1:00 PM | 2022/10/07 1:00 PM | Expired | |
| Daily Helios Round | Helios Solar Power/ Mojave | 2022/10/07 8:00 AM | 2022/10/07 4:00 PM | Expired | |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/10/03 1:00 PM | 2022/10/08 1:00 PM | Expired | |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/10/04 1:00 PM | 2022/10/09 1:00 PM | Expired | |

Optional: Filter on End date to view tasks for a specific date range.





| Task Event Browser End E | Date: Today 👻 | | | Count: 12 |
|----------------------------|----------------------------|---------------------|--------------------|-------------|
| sk History | | | | |
| Task Name | Storage Group | Start Time | End Time | Status |
| Q Search | Q Search | Q Search | Q Search | Q Search |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/10/08 1:00 PM | 2022/10/13 1:00 PM | On Time |
| Inspection zone 1 | Mojave/ Demo Montreal | 2022/10/13 10:00 AM | 2022/10/13 2:00 PM | Not Started |
| Daily Helios Round | Helios Solar Power/ Mojave | 2022/10/13 8:00 AM | 2022/10/13 4:00 PM | On Time |
| Weekly Helios Safety Check | Helios Solar Power/ Mojave | 2022/10/09 8:55 AM | 2022/10/14 8:55 AM | On Time |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/10/09 1:00 PM | 2022/10/14 1:00 PM | On Time |
| Inspection zone 3 | Mojave/ Demo Montreal | 2022/10/10 2:00 PM | 2022/10/14 2:00 PM | On Time |
| Inspection zone 2 | Mojave/ Demo Montreal | 2022/10/10 4:00 PM | 2022/10/14 4:00 PM | On Time |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/10/10 1:00 PM | 2022/10/15 1:00 PM | On Time |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/10/11 1:00 PM | 2022/10/16 1:00 PM | On Time |
| Weekly Safety Inspection | Helios Solar Power/ Mojave | 2022/10/12 4:05 AM | 2022/10/17 4:05 AM | On Time |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/10/12 1:00 PM | 2022/10/17 1:00 PM | On Time |
| Weekly Outside Plant Task | Helios Solar Power/ Mojave | 2022/10/13 1:00 PM | 2022/10/18 1:00 PM | Not Started |

• Select a task to view the details for that specific task event.

The Task Event Details page will appear.

| C Task Event Details | | | | |
|---|-----------------|------------|--------------|------------------|
| ptions | | | | |
| Task Operations Task Startline 2019/02/06 07:00:00 PM Deadline 2019/02/07 07:00:00 AM | | | | |
| Assignment Round/Variant | Assignees | Status | Completed By | Revoke Option |
| Q Search | Q Search | Q Search | Q Search | Q Search |
| Steam Turbine Round \ Shift1 | 1 | Incomplete | | Revoke |
| Air Cooling Condenser Round \ Shift1 | 1 | Incomplete | | Revoke |
| Electrical Generator Round \ Shift1 | 1 | Incomplete | | Revoke |
| Hot Salt Tank Round \ Shift1 | 1 | Incomplete | | Revoke |
| Cold Salt Tank Round \ Shift1 | 1 | Incomplete | | Revoke |
| Heat Exchanger Round \ Shift1 | 1 | Incomplete | | Revoke |
| Helio Stats Round \ Shift1 | 1 | Incomplete | | Revoke |
| Operations Round \ Shift1 | 1 | Incomplete | | Revoke |

• Select the task assignment round variant to view the task assignment details.





The Task Assignment Details page will appear.

| Task Assign | nment Details | |
|--|---|-----------------------|
| Options | | |
| Task Startline Deadline Round/Variant Status | Operations Task Daily 2019/02/06 07:00:00 PM 2019/02/07 07:00:00 AM Steam Turbine Round \ Shift1 Incomplete | |
| | | |
| Assignee | | Storage Group |
| Q Search | | Q Search |
| Admin Solar | | QA Helios Solar Plant |
| | | 1 Elements |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |





Performing Supervisory Reviews [Reviewers]

Note: Any user that has been defined as a "Reviewer" will have the ability to review and accept rounds marked as "To be reviewed".

• Add the Completed Rounds widget to your dashboard through the Manage Widgets icon.

| CASHBOARD | پچ MANAGER | REPORTS ADI | | 1 0 | | GoPlant User Helios Solar | G PLANT |
|-----------|---------------|------------------|-----------|------------|-------|------------------------------|---------|
| | | Manage Dashboard | l Widgets | | × | | |
| | | Start a Round | | 🗹 Repor | ts | | |
| | | Round Draft | | Chart | 1 | | |
| | | Task Assignme | ents | Chart | 2 | | |
| | | Completed Ro | unds 🥆 | Chart | 3 | | |
| | | Completed For | rms | Chart | 4 | | |
| | | Alert Notificati | ons | Chart | 5 | | |
| | | Task Manager | nent | | | | |
| | | Task History | | | Apply | | |

• The Completed Rounds widget will appear.

| Q Completed Rounds | | × |
|---------------------------|----------|--------|
| Round Name | Q Search | Browse |
| | | |

Select Browse.

The list of completed rounds will appear.

Note: The list of completed rounds will display all rounds completed within the last 24 hours by default. The timeframe selection will remember the last choice from this window so that it defaults to that selection the next time the 'Browse' button is selected.

| Name Varial Helio Stats Round Shift Steam Turbine Round Shift Heat Exchanger Round Shift Cold Salt Tank Round Shift | n (| QA Helios Solar Plant | Admin Solar | End Time 2019/02/06 12:20:16 PM | Review Status |
|---|------|-----------------------|-------------|------------------------------------|----------------|
| Steam Turbine Round Shift1 Heat Exchanger Round Shift1 | :1 (| | | 2019/02/06 12:20:16 PM | To be reviewed |
| Heat Exchanger Round Shift1 | | QA Helios Solar Plant | | | |
| | 1 (| | Admin Solar | 2019/02/06 12:06:09 PM | To be reviewed |
| Cold Salt Tank Round Shift1 | | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:04:50 PM | To be reviewed |
| cold sale faile found shire | :1 (| QA Helios Solar Plant | Admin Solar | 2019/02/06 12:04:11 PM | To be reviewed |
| Hot Salt Tank Round Shift1 | :1 (| QA Helios Solar Plant | Admin Solar | 2019/02/06 12:03:33 PM | No Review |
| Steam Turbine Round Shift1 | :1 (| QA Helios Solar Plant | Admin Solar | 2019/02/06 12:02:56 PM | To be reviewed |
| Steam Turbine Round Shift1 | :1 (| QA Helios Solar Plant | Admin Solar | 2019/02/06 11:55:13 AM | To be reviewed |
| Electrical Generator Round Shift1 | :1 (| QA Helios Solar Plant | Admin Solar | 2019/02/06 11:48:11 AM | To be reviewed |
| Air Cooling Condenser Shift1 Round | :1 C | QA Helios Solar Plant | Admin Solar | 2019/02/06 11:47:19 AM | No Review |
| Air Cooling Condenser Shift1 Round | :1 0 | QA Helios Solar Plant | Admin Solar | 2019/02/06 10:41:07 AM | No Review |





| Completed Rounds | Date Filter: Last 24 hours Last 24 hours | ✓ Review Status: All | ~ | | | 3 | |
|--------------------------------|--|-----------------------|---------------|------------------------|----------------|---|--|
| Name | Variant Variant From - To | Storage Goup | Operator Name | End Time | Review Status | | |
| Helio Stats Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:20:16 PM | To be reviewed | | |
| Steam Turbine Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:06:09 PM | To be reviewed | | |
| Heat Exchanger Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:04:50 PM | To be reviewed | | |
| Cold Salt Tank Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:04:11 PM | To be reviewed | | |
| Hot Salt Tank Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:03:33 PM | No Review | | |
| Steam Turbine Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:02:56 PM | To be reviewed | | |
| Steam Turbine Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 11:55:13 AM | To be reviewed | | |
| Electrical Generator Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 11:48:11 AM | To be reviewed | | |
| Air Cooling Condenser Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 11:47:19 AM | No Review | | |
| Air Cooling Condenser Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 10:41:07 AM | No Review | | |

• Optional: Select the Date Filter to filter the forms from a previous date.

| Name | Variant | Storage Group Review in p Review Cor | rogress | End Time | Review Status |
|--------------------------------|---------|---|-------------|------------------------|----------------|
| Helio Stats Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:20:16 PM | To be reviewed |
| Steam Turbine Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:06:09 PM | To be reviewed |
| Heat Exchanger Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:04:50 PM | To be reviewed |
| Cold Salt Tank Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:04:11 PM | To be reviewed |
| Hot Salt Tank Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:03:33 PM | No Review |
| Steam Turbine Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:02:56 PM | To be reviewed |
| Steam Turbine Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 11:55:13 AM | To be reviewed |
| Electrical Generator Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 11:48:11 AM | To be reviewed |
| Air Cooling Condenser Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 11:47:19 AM | No Review |
| Air Cooling Condenser Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 10:41:07 AM | No Review |
| | | | | | |

• Select "To be reviewed" in the Review Status dropdown to view only those rounds that need to be reviewed.

Note: If dual step review is enabled, the first reviewer has the option to filter on "To be reviewed". Once the first reviewer has completed the primary review, the Round will be marked with a status of "In Progress". Reviewers performing secondary reviews can use the option to filter on the "In Progress" status to mark the review as completed.





| Completed Rounds | Date Filter: Last 24 hours | Review Status: All | ~ | | 2 |
|--------------------------------|----------------------------|--|---------------|------------------------|----------------|
| Name | Variant | Storage Group | Operator Name | End Time | Review Status |
| Helio Stats Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:20:16 PM | To be reviewed |
| Steam Turbine Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:06:09 PM | To be reviewed |
| Heat Exchanger Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:04:50 PM | To be reviewed |
| Cold Salt Tank Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:04:11 PM | To be reviewed |
| Hot Salt Tank Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:03:33 PM | No Review |
| Steam Turbine Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 12:02:56 PM | To be reviewed |
| Steam Turbine Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 11:55:13 AM | To be reviewed |
| Electrical Generator Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 11:48:11 AM | To be reviewed |
| Air Cooling Condenser Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 11:47:19 AM | No Review |
| Air Cooling Condenser Round | Shift1 | QA Helios Solar Plant | Admin Solar | 2019/02/06 10:41:07 AM | No Review |

• Select a round. The completed forms will display. If the Round was within a Task the Task Information appears at the top of the page. Each Round Element completed will appear in the view.

| Task Information | | | | | | | | |
|--------------------------------------|-------------------------------|-----------|------------|-----------------|---------------|---------------|---------------|---|
| Name | Description | Status | Deadline | | Assignees | | | |
| Operations Task | | Completed | 2019/02/07 | 01:00:00 AM | Admin Sola | ar | | |
| ✓ 1/1 (Heliostats/ He | eliostats Form) | | | Start 2019/02/0 | 5 12:20:06 PM | End 2019/02/0 | 6 12:20:16 PM | 3 |
| Step Text | | | Response | | Date and T | ïme | User | |
| Mirror Modules | | | ок | | 2019/02/0 | 5 12:20:09 PM | Solar Admin | |
| Support Structure | | | ок | | 2019/02/0 | 5 12:20:10 PM | Solar Admin | |
| Position sensor | | | ОК | | 2019/02/0 | 5 12:20:11 PM | Solar Admin | |
| Interface with power | system and heliostat field co | ontroller | ОК | | 2019/02/0 | 5 12:20:12 PM | Solar Admin | |
| Drive controller | | | ок | | 2019/02/0 | 5 12:20:14 PM | Solar Admin | |
| Review and Appro | val | | | | | | | |
| Enter Review Com | nment here (optional) | | | Mark Reviewed | | | | |

• Select the edit icon to edit the Round Element Form collected data, if needed. Note: Only Admin and Editor role users will have the ability to edit a completed form.





| | Heliostats Form | | | | | ⊖ û | |
|--------------------------------|-----------------|------------|---------------|------------------------|------------------------|------------|--|
| V Task Inform | nation | | | | | | |
| Name | C | escription | Status | Deadline | Assignee | | |
| Operations T | ask | | Completed | 2019/02/06 07:00:00 PM | Admin Sola | r | |
| ✓ Asset Infor | mation | | | | | | |
| Tag | | Class (1) | Area - 2 | Location 3 | Misc 4 | | |
| Heliostats | | Class 01 | Area 1 | Field 1 | North | | |
| Form Information Serial No. | mation Name | Storage | Group | Start | End | | |
| 224472 | Heliostats Form | QA Helio | s Solar Plant | 2019/02/06 12:20:06 PM | 2019/02/06 12:20:16 PM | | |
| Responses | , | | | | | | |
| | Text | | Response | | Date and Time | User | |
| Edit tep | | | | | | | |

• Select the edit icon to change the collected response data.

Note: GoPlant will update the response and retain the previous data for auditing purposes. The response value will update with a new date time stamp and the editors username.

| and deweir [| Heliostats Form | | | | | |
|---------------|-----------------|-----------|---------------|------------------------|------------------------|-------------|
| ✓ Task Inform | nation | | | | | |
| Name | De | scription | Status | Deadline | Assignee | |
| Operations Ta | sk | | Completed | 2019/02/06 07:00:00 PM | Admin Sola | r |
| Asset Infor | nation | | | | | |
| Tag | C | lass (1) | Area - 2 | Location 3 | Misc 4 | |
| Heliostats | (| lass 01 | Area 1 | Field 1 | North | |
| ✔ Form Inforr | nation | | | | | |
| Serial No. | Name | Storage | Group | Start | End | |
| 224472 | Heliostats Form | QA Helio | s Solar Plant | 2019/02/06 12:20:06 PM | 2019/02/06 12:20:16 PM | |
| ✓ Responses | | | | | | |
| Edit Step | Text | | Response | | Date and Time | User |
| Mirro | or Modules | | | | 2019/02/06 12:20:09 PM | Admin Solar |

• Select "X" to close the completed form. The round under review will appear.





| ✓ Task Information | | | | | | | |
|-----------------------|------------------------------|-----------|-------|------------------------|----------------|---------------|---------------|
| Name | Description | Status | | Deadline | Assignees | | |
| Operations Task | | Completed | | 2019/02/07 01:00:00 AM | Admin Sola | ar | |
| ✔ 1/1 (Heliostats/ He | liostats Form) | | | Start 2019/02/0 | 06 12:20:06 PM | End 2019/02/0 | 5 12:20:16 PM |
| Step Text | | | Respo | onse | Date and T | ïme | User |
| Mirror Modules | | | ок | | 2019/02/0 | 5 12:20:09 PM | Solar Admin |
| Support Structure | | | ок | | 2019/02/0 | 5 12:20:10 PM | Solar Admin |
| Position sensor | | | ок | | 2019/02/0 | 5 12:20:11 PM | Solar Admin |
| Interface with power | system and heliostat field o | ontroller | ок | | 2019/02/0 | 5 12:20:12 PM | Solar Admin |
| Drive controller | | | ок | | 2019/02/0 | 5 12:20:14 PM | Solar Admin |
| ✓ Review and Appro | | | * | | | | |
| Enter Review Com | iment here (optional) | | | Mark Reviewed | | | |

• At the bottom enter a comment and select "Mark Reviewed" to accept the round.

| Cancel |
|--------|
| |

Note: If the round requires a password for authentication, the reviewer will be required to re-enter their password for round approval.





Creating Reports and Trend Charts [Admin, Editor]

Creating a GoPlant User Defined Report

• Select the Reports tab and the User Defined Reports sub tab.



- Use the left navigation panel to view the hierarchical structure of your company's organization. As you build your form reports and charts, use this panel to select the proper sub-group.
- Once you have navigated to the desired storage group, the list of user defined reports associated with that group are displayed.

| DASHBOARD MA | NAGER | REPORTS | ADMIN | | GoPlant Admin Plant 1 | LANT. |
|--------------------|-------|-------------------------------|---------------------------|-----------------------------|--------------------------------|-------|
| Helios Solar | | Solar / Plant dard Reports | 1 User Defined Reports | | | |
| Plant 2 New Report | | | | | Q Search | |
| | | Name | | Description | Source Form | |
| | | Q Search | | Q Search | Q Search | |
| | 6 | <u>II Ex</u> | ample Report | User defined report example | Another Test Form Test Form | 面 |
| | i | C Ex | ample Chart | Chart from example report | | Û |
| | Ø [] | <u>II Pr</u> | essure Readings | Pressure readings over time | Test Form | 面 |
| | | | | 3 Elements | | |

- Create a new report by selecting
- Click New Report. The Report window opens on the Settings tab:

| Report editor Daily Heat Exchanger Report | ٢ | B | × |
|---|---|---|---|
| Settings Form | | | _ |
| Name * Daily Heat Exchanger Report Description Enter Report Description | | | |
| | | | |





- Enter the Name of the Report in Name.
- Optional: Enter a description of the report in **Description**.
- Click on the Form tab then click Select Report Forms to open the form selection tool.

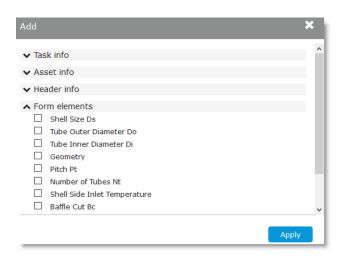
| Associated Forms | × |
|--|---|
| Select Report Forms | |
| Search Forms | ^ |
| × Helios Solar | ~ |
| Air Cooling Condesor Form | |
| Electrical Generator Form | |
| Helios Solar / Plant 1 | ~ |
| Accelerometer form Pressure Reading form | |
| Safety Inspection Form | |
| Steam Turbine Form | |

• After selecting one or more forms, the Columns/Rows and Filters tabs appear:

| eport editor Daily Heat Exchan | er Report | Ó | B | × |
|---------------------------------|---|-----|---|---|
| Settings Form Colu | ns/Rows Filters | | | _ |
| Column Row List | Column Row Settings | | | |
| Add Column Row | Select an Element in the Form Overv and the settings appear here | iew | | |
| | | | | |
| | | | | |

• Click **Add Column** to add the Step Responses to the Report. The Step Text for each response is listed under a 'Form Elements' section for each form. The Add Column window appears:





- Click on the **drop-down arrow** to display available Task, Asset, Review, Header, and form elements values to be added to the report. **Check** to select that value for the report. Once you have selected your columns click **Apply**. The column list refreshes with the values you choose.
- Click on the value in Column List to display the **Column settings** for that value and to change its Column Header Alias.
- Click on the Filters tab to filter your results with set criteria.
- Check **Any** to retrieve results that match any of the criteria and check **All** to only retrieve results that match all criteria.
- Click Add Filter to select the filter criteria values. Click on the drop-down arrow to display available Task, Asset, Review, Header, and form elements values to be added as filters. Check to select that value for the report. Once you have selected your columns click Apply. The filter list refreshes with the values you choose.
- Click on the value in Filter List including the default filters **Runtime User** and **Runtime Date Range** to display the **Filter settings** for that value and set the filter criteria.
- Follow the appropriate steps based on your selection.
 - Click 🖹 to save the report.
 - Click
to preview your report.

Creating a GoPlant Chart

LANT

GoPlant Charts are created based upon an underlying report. The Report must be configured with a Date Range in the Columns chosen to have a Horizontal Axis component. Charts are dependent upon the parent Report as shown in the Reports Tab and should be created under a Report that serves as the data collection report for the chart.





- Create a new chart by selecting Inext to a report on the Reports window. The Chart Editor will be displayed.
- Enter the name of the report in Name.
- Enter the description of the report in **Description**.
- Select the appropriate **Chart Type**. A preview of your chart appears in the Simulated Chart area.
- Line Chart: Displays series as a set of points connected by a line. This type of chart is useful for trending.

Note: Additional chart displays (i.e., Bar Charts, Area Charts, etc.) will be available once the chart feature has been fully implemented in a future release.

- Click on the **Data tab** to select the Horizontal and Vertical axis.
- Select the appropriate column you added to your report from the Horizontal **drop down** to define the horizontal axis.
- Select the appropriate Vertical option in Computation.
- Check to select the applicable Numeric columns to include in the Chart.
- Click on the **filters tab** to change the filter values inherited from the Report for running the chart.
- Follow the appropriate steps based on your selection.
 - Click 🖹 to save the chart.
 - Click 🗠 to preview your chart.

Print Blank Forms, Rounds, Tasks

Print Blank Forms functions for Forms, Round, Assets and Tasks that allow operators to fill in the information via paper format. In case of mobile device failure or other issues, access to a website would allow them to print a blank Round that the operator could take on a clipboard and fill out. The operator can be guided through data collection on paper along with the visibility rules and the design of the questions that would be shown in the GoPlant Mobile application.

Print Blank Forms

• Use the left navigation panel to view the hierarchical structure of your company's organization. As you build your forms, use this panel to select a sub-group which will allow you to add forms within it.





| - Helios Solar | « | Helios Solar | / Plant 2 | | | | | | | |
|----------------|---|--------------|------------|--------|--------|-------|---------------|-------|-------------|--------------------|
| Plant 1 | | Forms | Form Tools | Assets | Rounds | Tasks | External Tags | Users | User Groups | Plant 2 Properties |
| Plant 2 | _ | | | | | | | | | |

• Select the Forms Tab. The Forms page appears.

| n Ding Condenser Form alt Tank Form | Rounds Q. Search 2 2 | Assets Q Search 2 2 | Tasks Q Search 0 0 | Reports Q Search 2 1 | Version Q Search Version 3 Version 2 | අ <u>ප</u> |
|---|-------------------------------|------------------------------|----------------------------------|---|---|--|
| oling Condenser Form | 2 | 2 | 0 | | Version 3 | |
| alt Tank Form | 2 | | | 2 | | |
| | | 2 | 0 | 1 | Version 2 | C D |
| Generator Form | - | | | | | |
| | 2 | 2 | 0 | 1 | Version 2 | പ്പ |
| xchanger Form | 2 | 2 | 0 | 1 | Version 5 | <i>C</i> u |
| tats Form | 2 | 2 | 0 | 1 | Version 3 | C2 |
| It Tank Form | 3 | 2 | 0 | 1 | Version 2 | ළ |
| Turbine Form | 2 | 2 | 0 | 1 | Version 4 | C L |
| | ats Form It Tank Form | ats Form 2 It Tank Form 3 | ats Form 2 2 It Tank Form 3 2 | ats Form 2 2 0 It Tank Form 3 2 0 | ats Form 2 2 0 1 It Tank Form 3 2 0 1 | 2 2 0 1 Version 3 It Tank Form 3 2 0 1 Version 2 |

The print icon will be enabled only for the Published Forms. Click 🖶 to print.

| Options | | Close |
|--|-------|-------|
| | Name: | |
| | Date: | |
| | Time: | |
| Loading | | |
| [| | |
| Form: Air Cooling Condenser Form | Name: | |
| Version: 8 Storage Group: FASQA / Max / QA Helios Solar Plant | Date: | |
| Current State: Published | Time: | |

Header Information shows the Form information, such as Form Name, Version, Storage Group and Current Status. On the right side appear three blank fields (Name, Date and Time) to be filled manually.





| Form: Air Cooling Condenser Form | Name: |
|--|-----------------------------|
| Version: 7 | Date: |
| Storage Group: FASQA / Max / QA Helios Solar Plant Current State: Published | Time: |
| | ······ |
| Form: Air Cooling Condenser Form v7 | |
| 1.0 Page 1 | |
| 1.1 Show Instructions | |
| | |
| Superheated refrigerant vapor enters tl | he inlet header connections |
| | |
| | |
| | |
| | (Show Instructions) |
| * 1.2 Condensed Refrigerant Liquid Out | |
| External Tags: External TAG 0001 | |
| Answer History: (No History) | |
| | (Decimal 2 Digit(S)) |
| When the Answer is answered, then complete Step 1.3. | |
| | |
| * 1.3 Cool Dry Entering Air | |
| Complete this step when ANY of the following rules match. Step 1.2 is answered. | |
| External Tags: External TAG 0002 | |
| Answer History: (No History) | |
| | (Decimal 2 Divit/c)) |
| When the Answer is answered, then complete Step 1.4. | (Decimal 2 Digit(s)) |
| when the Answer is answered, then complete step 1.4. | |
| * 1.4 Superheated Refrigerant Gas In | |
| Complete this step when ANY of the following rules match. | |
| Step 1.3 is answered. External Tags: External TAG 0003 | |
| Answer History: (No History) | |
| | |
| | (Decimal 2 Digit(s)) |
| When the Answer is answered, then complete Step 1.5. | |
| | |
| * 1.5 Hot Dry Discharge Air | |
| Complete this step when ANY of the following rules match. Step 1.4 is answered. | |
| External Tags: External TAG 0004 | |
| Answer History: (No History) | |
| , and the first of fi | |
| | (Decimal 2 Digit(s)) |

By default, the Display Format is loaded in Rows, moving the mouse over the options ^{Options} button, you have option to select the view in columns.





| Options | | Close |
|--|--|-------|
| Column Template | os Solar Plant Date: Time: | |
| Superheated refriger | ant vapor enters the inlet header connections. | |
| * 1.2 Condensed Refrigerant Liquid O External Tags: External TAG 0001 Answer History: (No History) | (Show Instructions) | |

Move the mouse over options and check Column Template.



| GĄ | PL | . A | Ν | Т | œ |
|----|----|------------|---|---|---|
|----|----|------------|---|---|---|

| Form: Air Cooling Condenser Form Version: 7 | Name: | |
|--|-------------------------|--|
| Storage Group: FASQA / Max / QA Helios Solar Plant | Date: | |
| Current State: Published | Time: | |
| rm: Air Cooling Condenser Form v7 | | |
| 0 Page 1 | | |
| 1.1 Show Instructions | | |
| Superheated refrigerant vapor enters the ir | let header connections. | |
| | | |
| * 1.2 Condensed Refrigerant Liquid Out | | |
| External Tags: External TAG 0001 | | (Decimal 2 Digit(s)) |
| Answer History: (No History) | | |
| * 1.3 Cool Dry Entering Air | | |
| Complete this step when ANY of the following rules match. Step 1.2 is answered. | | (Decimal 2 Digit(s)) |
| External Tags: External TAG 0002 | | |
| Answer History: (No History) | | |
| * 1.4 Superheated Refrigerant Gas In | | |
| Complete this step when ANY of the following rules match. Step 1.3 is answered. | | (Decimal 2 Digit(s)) |
| External Tags: External TAG 0003 | | |
| Answer History: (No History) | | |
| Answer history: (No history) | | |
| * 1.5 Hot Dry Discharge Air | | |
| Complete this step when ANY of the following rules match. Step 1.4 is answered. | | (Decimal 2 Digit(s)) |
| External Tags: External TAG 0004 | | |
| Answer History: (No History) | | |
| * 1.6 Fan Speed Control | | |
| Complete this step when ANY of the following rules match. Step 1.5 is answered. | | (Answer Only One) |
| External Tags: External TAG 0005 | | |
| Answer History: (No History) | | |
| 1.7 Pop Up Message Step | | "Contact your supervisor!" (Pop Up Message) |
| Complete this step when ANY of the following rules match. Step 1.6 is equal to "NOk". | | (FUP UP Message) |
| * 1.8 Refrigerant Pressure Sensor | | Ok |
| Complete this step when ANY of the following rules match. Step 1.6 is answered. | | (Answer Only One) |
| External Tags: External TAG 0006 | | |
| Answer History: (No History) | | |
| | | "Contact your supervisor!" |
| 1.9 Pop Up Message Step | | "Contact your supervisor!" (Pop Up Message) |
| Complete this step when ANY of the following rules match. Step 1.8 is equal to "NOk". | | |
| * 1.10 Ambient Temperature Sensor | | Ok |
| Complete this step when ANY of the following rules match. | | (Answer Only One) |
| Step 1.8 is answered. | | |
| | | |
| External Tags: External TAG 0007 Answer History: (No History) | | |

In addition to the view in columns and rows, the user can include additional options in the view as (Show External Tags, Show Answer History, Show Triggers, Show Details, Images Width).





| Options | |
|--------------------------|--|
| Display Format: | |
| Row Template | |
| OColumn Template | |
| Show External Tags | |
| Show Answer History | |
| Show Triggers | |
| Show Details | |
| Show Images - Width: 200 | |

• Show External Tags

Show the Tag Name associated with the step question, if the step has multiple associated Tags, it will show the selected one to be displayed in the Form.

- Row Template

| * 1.2 Condensed Refrigerant Liquid Out External Tags: External TAG 0001 Answer History: (No History) |
|--|
| (Decimal 2 Digit(s)) |
| When the Answer is answered, then complete Step 1.3. |
| Trigger: When the Answer is equal to "10", then Send Email to SKF Admin. |

- Column Template

| * 1.2 Condensed Refrigerant Liquid O External Tags: External TAG 0001 Answer History: (No History) | | (Decimal 2 Digit(s)) |
|--|-------------------------------------|----------------------|
| Trigger: When the Answer is equal to | "10", then Send Email to SKF Admin. | |

• Show Answer History

This option will be available when the form is printed from Assets Tab, Tasks Tab, or Rounds Tab. When the form does not have a relationship with an asset it will be displayed (No History).





- Row Template

| * 1.2 Condensed Refrigerant Liquid Out External Tags: External TAG 0001 Answer History: (No History) |
|--|
| (Decimal 2 Digit(s)) |
| When the Answer is answered, then complete Step 1.3. |
| Trigger: When the Answer is equal to "10", then Send Email to SKF Admin. |

- Column Template

| * 1.2 Condensed Refrigerant Liquid Out External Tags: External TAG 0001 Answer History: (No History) Trigger When the Answer is equal to "10" then Send Empil to SKE Admin | (Decimal 2 Digit(s)) |
|---|----------------------|
| Trigger: When the Answer is equal to "10", then Send Email to SKF Admin. | |

• Show Triggers

It will show the triggers created by the user for each step question. These can be triggers for emails, asset state change, or set Alarm conditions for Reporting and alerting purposes. This will display the exceptions that are generated in reports.

- Row Template

| * 1.2 Condensed Refrigerant Liquid C | ut | |
|--------------------------------------|---------------------------------------|--|
| External Tags: External TAG 0001 | | |
| Answer History: (No History) | | |
| | | |
| | (Decimal 2 Digit(s)) | |
| When the Answer is answered, the | complete Step 1.3. | |
| Trigger: When the Answer is equal | o "10", then Send Email to SKF Admin. | |

- Column Template

| * 1.2 Condensed Refrigerant Liquid Out | |
|--|----------------------|
| External Tags: External TAG 0001 | (Decimal 2 Digit(s)) |
| Answer History: (No History) | |
| Trigger: When the Answer is equal to "10", then Send Email to SKF Admin. | |
| | |





Show Details

Show Details will show different information depending upon the user's choice to print the Form from Forms Tab, Assets Tab, Tasks Tab or Rounds Tab.

When the Blank Form comes from Forms Tab, "Show Details" will show the description of the form and the step comments.

| ins . | | |
|---|--------------------------------------|-----------|
| Form: Capacitor Form | Name: | |
| Version: 6 | Date: | |
| Storage Group: FASQA / Max / Plant / Bldg1 | | |
| Current State: Published Description: 370VAC - Oil Filled Motor Run Capacitor | Time: | |
| orm: Capacitor Form v6 370VAC - Oil Filled Motor Run Capacitor | | |
| 1.0 New Page | | |
| 1.1 Instructions | | |
| | | |
| | nent "2018214 PDF" Download Open) | |
| (View Docur | nent "2018214 PDF" Download Open) | |
| * 1.2 Voltage | | |
| External Tags: Honeywell DynAMo CAPA47 | | |
| | (Defaul | t = "370" |
| (Decim | al 2 Digit(s) Min: (0) Max: (1000)) | |
| | | |
| * 1.3 Life (Hours) | | |
| External Tags: Honeywell DynAMo CAPA48 | | |
| | (Default = | "60000" |
| (Decime) | I 2 Digit(s) Min: (0) Max: (100000)) | |

- Row Template

- Column Template

| Options | Close |
|--|--|
| Form: Capacitor Form Version: 6 Storage Group: FASQA / Max / Plant / Bldg1 Current State: Published Description: 370VAC - Oil Filled Motor Run Capacitor | Name: Date: Time: |
| 1.0 New Page | |
| 1.1 Instructions | (View Document "2018214 PDF" Download Open) |
| * 1.2 Voltage | |
| External Tags: Honeywell DynAMo CAPA47 | (Default = "370") (Decimal 2 Digit(s) Min: (0) Max: (1000)) |
| * 1.3 Life (Hours) | |
| External Tags: Honeywell DynAMo CAPA48 | (Default = "60000") (Decimal 2 Digit(s) Min: (0) Max: (100000)) |

In the case that the blank form print is chosen from the other areas (Assets Tab, Tasks Tab or Rounds Tab) the display will show specific information of each choice.

• Show Images – Width





The user can customize the size in pixels, If the form contains images.

- Row Template

| Options | | |
|--------------------------|-----------------------|----------------------|
| Display Format: | | Name: |
| | / Unit1-1 | Date: |
| OColumn Template | | Time: |
| Show External Tags | | |
| Show Answer History | | |
| Show Triggers | | |
| Show Details | | |
| Show Images - Width: 400 | | |
| | | * ANT |
| | (View Document "JPG I | FILE" Download Open) |

- Column Template

| Options | | | |
|--------------------------|----------------|-------|------------------------------------|
| Display Format: | | Name: | |
| ORow Template | / Unit1-1 | Date: | |
| Column Template | | Time: | |
| Show External Tags | | | |
| Show Answer History | | | |
| Show Triggers | | | |
| Show Details | | | (View Document "JPG FILE" Download |
| Show Images - Width: 400 | | | Open) |
| | Version 2017.4 | × | |

In both formats the user has the option to download or open the image, by clicking on Download or Open.

| (View Document "JPG FILE" Download Open) | |
|--|--|
| | |
| | |

- Visibility Rules, each step created with visibility rule, will show the rule, to know if it is necessary or not to complete it.
 - Row Template





| * 1.2 Condensed Refrigerant Liquid Out |
|--|
| External Tags: External TAG 0001 |
| Answer History: (No History) |
| |
| (Decimal 2 Digit(s)) |
| When the Answer is answered, then complete Step 1.3. |
| Trigger: When the Answer is equal to "10", then Send Email to FAS Admin. |
| |
| * 1.3 Cool Dry Entering Air |
| Complete this step when ANY of the following rules match. Step 1.2 is answered. |
| step i.z is answered. |
| External Tags: External TAG 0002 |
| Answer History: (No History) |
| |
| (Decimal 2 Digit(s)) |
| When the Answer is answered, then complete Step 1.4. |
| • |

- Column Template

| External Tags: External TAG 0001 | (Decimal 2 Digit(s)) |
|--|--------------------------|
| Answer History: (No History) | (|
| Trigger: When the Answer is equal to "10", then Send Email to FAS Admin. | |
| * 1.3 Cool Dry Entering Air | |
| Complete this step when ANY of the following rules match. Step 1.2 is answered. | (Decimal 2 Digit(s)) |
| External Tags: External TAG 0002 | |
| Answer History: (No History) | |

Print Blank Rounds

Use the left navigation panel to view the hierarchical structure of your company's organization.

| » | Helios Solar | Power / Mojave | | | | | | | | |
|---|--------------|----------------|--------|--------|-------|---------|---------------|-------|-------------|-------------------|
| | Forms | Form Tools | Assets | Rounds | Tasks | Reports | External Tags | Users | User Groups | Mojave Properties |

• Select the Rounds Tab.





| New Round | is | | | | | | Q Search | h |
|-----------|-----------------------------|-----------------|----------|----------|-----------|-----------|----------|------|
| | Name | Assets | Forms | Tasks | Version | Published | | |
| | Q Search | Q Search | Q Search | Q Search | Q Search | Q Search | | Sear |
| © ⊖ | Air Cooling Condenser Round | 1 | 0 | 1 | Version 1 | × | Ch I | î |
| © ⊖ | Cold Salt Tank Round | 2 | 0 | 1 | Version 1 | × | æ | Ô |
| ø ⊖ | Electrical Generator Round | 1 | 0 | 1 | Version 1 | × | æ | Ô |
| ø ₽ | Heat Exchanger Round | 1 | 0 | 1 | Version 1 | × | പ്പ | Ô |
| ø ₽ | Helio Stats Round | 1 | 0 | 1 | Version 1 | × | പ്പ | Î |
| ø₽ | Hot Salt Tank Round | 1 | 0 | 1 | Version 1 | × | C | Ô |
| 6 e | Operations Round | 7 | 0 | 0 | Version 2 | × | C1 | Î |
| « ө | Steam Turbine Round | 1 | 0 | 1 | Version 1 | × | C1 | Î |
| | `` | 8 Eleme | nts | | | | | |

The Rounds page appears.

• Print a Blank Round by selecting 🖶 icon.

| Round: Operations Round | Name: |
|--|---|
| Storage Group: FASQA / Max / QA Helios Solar Plant | Date: |
| Current State: Published | Time: |
| | Review Required #1: |
| Variants: | |
| Shift1 | Shift2 |
| Shift3 | Shift4 |
| Elements: | |
| * QA Helios Solar Plant/Air Cooling Condenser COND-101/Air Cooling Condenser | * QA Helios Solar Plant/Cold Salt Tank CST-1/Cold Salt Tank Form |
| Form | * QA Helios Solar Plant/Electrical Generator EG-1/Electrical Generator Form |
| * QA Helios Solar Plant/Heat Exchanger HX-103/Heat Exchanger Form | * QA Helios Solar Plant/Heliostats/Heliostats Form |
| * OA Helios Solar Plant/Hot Salt Tank HST-1/Hot Salt Tank Form | * OA Helios Solar Plant/Steam Turbine ST-1/Steam Turbine Form |

Round information will be loaded and then the detail of the associated forms. The symbol * shown next to the elements indicates that they are required.

| Options | | | Close |
|--------------------------------------|---------------------------------------|---|-------|
| Display Format: | | Name: | |
| ORow Template | os Solar Plant | Date: | |
| Ocolumn Template | | Time: | |
| Show External Tags | | Review Required #1: | |
| Show Answer History | | | |
| Show Triggers | | Shift2 | |
| Show Details | | Shift4 | |
| Show Images - Width: 400 | denser COND-101/Air Cooling Condenser | * QA Helios Solar Plant/Cold Salt Tank CST-1/Cold Salt Tank Form | |
| Variants: | r HX-103/Heat Exchanger Form | * QA Helios Solar Plant/Electrical Generator EG-1/Electrical Generator Form * QA Helios Solar Plant/Heliostats/Heliostats Form | |
| @Shift1 | ST-1/Hot Salt Tank Form | * QA Helios Solar Plant/Steam Turbine ST-1/Steam Turbine Form | |
| Oshift2 | | | |
| Oshift3 | | | |
| OShift4 | | | |
| *Form: Air Cooling Condenser Form v8 | | | |

If the round has more than one associated variant, the first one will be loaded by default, but the user can select another variant associated with the Round. To select another variant move the mouse over the

^{Options} button and select the variant you want to display/Print.





| Name of the second of the seco | | | |
|--|--|--|---------------------------------|
| Name: A cooling conductor From 01 | Round: Operations Round Variant: Shift2 | | |
| Permer Arc Config Condenser Form Vil 1.3 Solve Inductions 1.3 Solve Inductions Superheated refrigerant upped Ox. Assert History (1500) (1500) (1500) (1400) (1111) (13333) (100.00) Tigger Uthan de Administration (110) the Solve Induction (11111) (13333) (100.00) Tigger Uthan de Administration (110) the Solve Induction (11111) (13333) (100.00) Tigger Uthan de Administration (110) the Solve Induction (11111) (13333) (100.00) Tigger Uthan de Administration (110) the Solve Induction (11111) (13333) (100.00) Tigger Uthan de Administration (110) the Solve Induction (11111) (13333) (100.00) Tigger Uthan de Administration (110) the Solve Induction (1100) the Solve Induction (11000) the Solve Induction (11000) the Solve Induction (11000) | *Asset: Air Cooling Condenser COND-101 | | |
| 1.1 Show Instructions Superheated refrigerant vapor enters the inlet header connections. * 12 Condensed Biologierant Lipide Dut Answer History (1500, 733.07, 744.00, 711.11, 112.23, 7105.07) Tigger Viet met History (1500, 733.07, 744.00, 711.11, 112.23, 7105.07) Tigger Viet met History (1500, 730.07, 744.00, 711.11, 112.23, 7105.07) Tigger Viet met History (1500, 712.07, 722.07, 955.57, 730.07) Maxeer History (1500, 712.07, 722.07, 955.57, 730.07) Therm Call Statistics Monitor 2 2 Allower Vietory (150, 715.27, 140.7, 720.7, 720.7, 955.57, 730.07) Therm Call Statistics (14, 112, 112.27, 195.57, 730.07) Therm Call Statistics (14, 112, 112.07, 720.7, 755.07, 750.07) Therm Call Statistics (14, 112, 112.07, 720.7, 755.07, 750.07) Therm Call Statistics (14, 112, 112.07, 720.7, 755.07, 750.07) Therm Call Statistics (14, 112, 112.07, 720.7, 755.07, 750.07) Therm Call Statistics (14, 112, 112.07) Therm Call Statistics (14, 112.07, 750.07, 750.07, 720.07) Therm Call Statistics (14, 112, 112.07) Therm Call Statistics (14, 112, 112.07, 720.7 | *Form: Air Cooling Condenser Form v8 | | |
| Superheated refrigerant vapor enters the inlet header connections. • 1.2 Contensed Refrigerant Upud Out Answer History: (1500, 170,001, 150,001, 144,00, 111,11, 132,331, 100,00) Tigger, When the Answers is equal to 100, then send thread to Adven. • 1.2 Continenced Refrigerant Upud Out Answer History: (1500, 170,001, 120,001, 150,007, 120,001, 150,007, 120,001, 150,007, 120,001, 150,007, 120,001, 150,007, 120,001, 150,007, 120,001, 150,007, 120,001, 120,000,000 * Network History: (1500, 170,037, 1500, 150,007, 120,001, 150,007, 120,001, 120,000,000,000,000,000,000,000,000,000, | 1.0 Page 1 | | |
| Superheated refrigerant vapor enters the inlet header connections. • 12 contensed hefrigrant liquid Out Averer filtery: (1500; 17800; 17800; 15500; 14400; 11111; 12333; 11000) Tigger: When the Arouve is equal to 10; thus Send Ewalts FAS Atom. • 12 contensed Hefrigrant Liquid Out Averer filtery: (1500; 17800; 1200; 15500; 14400; 11111; 12333; 11000) Tigger: When the Arouve is equal to 10; thus Send Ewalts FAS Atom. • 12 contensed Hefrigrant Liquid Out Averer filtery: (1500; 1200; 1200; 15500; 1200; 15500; 12000) * Averer filtery: (1500; 1200; 15500; 1200; 15607; 1200; 15607; 1200; 1000; | 11 Show Instructions | | |
| * 12. Contenues Refregerant Liquid Out | | | |
| * 12 Condenses Befrigerant Liquid Out | | | |
| Asser History (%5:07, 78:07 | Superheated refrigerant | vapor enters the inlet header connections. | |
| Asser History (%5:07, 78:07 | | | |
| Asser History (%5:07, 78:07 | | | |
| Answer History: (%5:07: 78:00; 75:00; 75:00; 75:00; 75:00; 75:00; (Decimal 2 Digits) Tigger: When the Answer is sequal to "10", then Steed famal to FXS Admin. (Decimal 2 Digits) * 1.1 Cool Dby Entering Adm (Decimal 2 Digits) Complete this seque when AVY of the following rules match. (Decimal 2 Digits) State Tool Stat Tank CE1-1 (Decimal 2 Digits) * Answer History: (160: 07: 00: 12:00; 75:00; 72:00; 75:00; 72:00; 75:00; 72:00; 75:00; 72:00; 75:00; 72:00; 75:00; 7 | * 1.2 Condensed Refrigerant Liquid Out | | |
| Tigger: When the Answer is equal to '10', then Send Email to FAS Admin. (UDENIME Digglas) * 11 Goal Dy Entering Air Complete bits step winn AMY of the following rules match. Step 12 is always (56.07, '12.00', '22.00', '55.00', '22.22', '555.55', '200.00') (Decimal 2 Dig(ts)) * Answer History: ('6.00', '10.20', '22.00', '55.00', '22.22', '555.55', '200.00') (Decimal 2 Dig(ts)) * 21 Level Answer History: ('6.00', '16.33', '5.00', '56.00') (Decimal 2 Dig(ts)) * 21 Level Answer History: ('6.00', '16.43', '5.00', '56.00') (Decimal 2 Dig(ts)) * 21 Level Answer History: ('6.00', '16.45', '14.00', '12.00') (Decimal 2 Dig(ts)) * 23 Level Play (Decimal 2 Dig(ts)) * 24 Level Flow Ut (Decimal 2 Dig(ts)) * 24 Level Flow Ut (Decimal 2 Dig(ts)) * 24 Level Flow In (Decimal 2 Dig(ts)) * 24 Cold Water Flow In (Decimal 2 Dig(ts)) * 24 Cold Water Flow In (Decimal 2 Dig(ts)) * 25 Cold Water Flow In (Decimal 2 Dig(ts)) * 26 Cold Water Flow In (Decimal 2 Dig(ts)) * 26 Tempering Wale (Decimal 2 Dig(ts)) * 27 Hung How John (Decimal 2 Dig(ts)) * 26 Tempering Wale (Decimal 2 Dig(ts)) * 27 Hung How John (Decimal 2 Dig(ts)) * 28 Tempering Wale (Decimal 2 Dig(ts)) * 29 Tempering Wale (Decimal 2 Dig(ts)) * 20 Hung How Jo | | 0" "444 00" "111 11" "333 33" "100 00") | |
| • 1.3 Cool Dy Entering Air [Decimal 2 Digits] • 1.3 Cool Dy Entering Air [Decimal 2 Digits] • 1.3 Cool Dy Entering Air [Decimal 2 Digits] • 1.3 Cool Dy Entering Air [Decimal 2 Digits] • Answer History (*6.07, *12.07, *22.07, *555.57, *200.07) [Decimal 2 Digits] • Answer History (*6.07, *6.33, *5.07, *5.07) [Decimal 2 Digits] • 2.1 Level Answer History (*6.07, *6.33, *5.07, *5.07) [Decimal 2 Digits] • 2.1 Level Answer History (*6.07, *6.43, *5.07, *5.07) [Decimal 2 Digits] • 2.1 Level Answer History (*6.07, *5.45, *1.400, *12.07) [Decimal 2 Digits] • 2.1 Level Answer History (*0.07, *5.45, *1.400, *12.07) [Decimal 2 Digits] • 2.1 Level Answer History (*0.07, *5.45, *1.400, *12.07) [Decimal 2 Digits] • 2.1 Cold Water Row In [Decimal 2 Digits] [Decimal 2 Digits] • 2.1 Cold Water Row Ont [Decimal 2 Digits] [Decimal 2 Digits] • 2.1 Cold Water Row Ont [Decimal 2 Digits] [Decimal 2 Digits] • 2.2 Cold Water Row Ont [Decimal 2 Digits] [Decimal 2 Digits] • 2.2 Cold Water Row Ont [Decimal 2 Digits] [Decimal 2 Digits] • 2.2 Cold Water Row Ont [Decimal 2 Digits] [Decimal 2 Digits] • 2.2 Cold Water Row Ont [Decimal 2 Digits] [Decimal 2 Digits] | | | (Decimal 2 Digit(s)) |
| complete this tage when AW of the following rules match. Step 12.8 newsered. Answer History: (*5.00°, *12.00°, *22.20°, *555.00°, *22.22°, *555.55°, *200.00°) [Decimal 2 Digits) *Assect cold Saft Task Corn / 22.20°, *555.00°, *22.22°, *555.55°, *200.00°) [Chernal 2 Digits) *Assect cold Saft Task Corn / 22.20°, *555.00°, *22.22°, *555.55°, *200.00°) [Chernal 2 Digits) *2.1 Level [Chernal 2 Digits) [Chernal 2 Digits) *2.2 How Page [Chernal 2 Digits) [Chernal 2 Digits) *2.2 How Water Flow In [Chernal 2 Digits) [Chernal 2 Digits) *2.3 How Water Flow Dut [Chernal 2 Digits) [Chernal 2 Digits) *2.4 Cold Water Flow Unt [Chernal 2 Digits) [Chernal 2 Digits) *2.4 Cold Water Flow Out [Chernal 2 Digits) [Chernal 2 Digits) *2.5 Cold Water Flow Out [Chernal 2 Digits) [Chernal 2 Digits) *2.5 Cold Water Flow Out [Chernal 2 Digits) [Chernal 2 Digits) *2.5 Cold Water Flow Out [Chernal 2 Digits) [Chernal 2 Digits) *2.5 Cold Water Flow Out [Chernal 2 Digits) [Chernal 2 Digits) *2.5 Cold Water Flow Out [Chernal 2 Digits) [Chernal 2 Digits) *2.5 Cold Water Flow Out [Chernal 2 Digits | Tigget. When the Answer is equal to To | , den sera cinar to Exs Admin. | |
| Step 1.2 is answered. Answer History (COC), '12.00, '22.00, '25.00,' 25.00,' 22.2.2.7, '55.5.5', '200.00') Read #asseer History (COC), '12.00, '22.00, '25.00,' 22.2.2.7, '55.5.5', '200.00') Read #asseer History (COC), '12.00, '22.00, '25.00,' 22.2.2.7, '55.55', '200.00') (Decimal 2 Digits) #2.1 Leel Answer History (CS.00,' 16.33', '5.00', '56.00') (Decimal 2 Digits) #2.1 Leel Answer History (CS.00,' 15.52', '45.00', '55.00') (Decimal 2 Digits) #2.1 Leel Answer History (CS.00,' 15.45', '14.00', '12.00') (Decimal 2 Digits) #2.1 Cold Water Flow In Answer History (CS.00', '15.45', '14.00', '12.00') (Decimal 2 Digits) #2.4 Cold Water Flow In Answer History (CS.00', '14.00', '14.00', '12.00') (Decimal 2 Digits) #2.4 Cold Water Flow Out Answer History (CS.00', '14.00', '14.00', '14.00') (Decimal 2 Digits) #2.4 Cold Water Flow Out Answer History (CS.00', '14.00', '14.00') (Decimal 2 Digits) #2.4 Cold Water Flow Out Answer History (CS.00', '14.00', '14.00') (Decimal 2 Digits) #2.4 Cold Water Flow Out Answer History (CS.00', '14.00', '14.00') (Decimal 2 Digits) #2.4 Cold Water Flow Out Answer History (CS.00', '14.00', '14.00') (Decimal 2 Digits) #2.5 Cold Water Flow In Answer History (CS.00', '14.00', '14.00') (Decimal 2 Digits) #3.8 Water Cold In Answer History (CS.00', '14.00', '14.00', '14.00') (Deci | * 1.3 Cool Dry Entering Air | | |
| Numer History: (150, 11, 2007, 122, 2007, 155, 007, 122, 227, 155, 557, 120, 007) *Asser: Cidd Sait Tank (Sri.1 *Berner di Sait Tank (Sri.1) *Berner di Sait Tank (Sri.1) *El Inter di Sait Tank (Sri.1) *2.1 Level Answer History: (15,007, 15,007, 15,007) *2.1 Level Answer History: (15,007, 15,007, 15,007) *2.1 Level Answer History: (15,007, 15,487, 14,007, 12,007) *2.2 Loct Water Flow In Answer History: (15,407, 12,467, 12,007) *2.2 Cidd Water Flow In Answer History: (15,407, 12,467, 12,007) *2.2 Cidd Water Flow Out Answer History: (15,407, 12,467, 12,007) *2.4 Cidd Water Flow In Answer History: (13,407, 13,407, 14,007, 12,007) *2.4 Cidd Water Flow Unt Answer History: (13,407, 13,407, 14,007, 14,007) *2.4 Cidd Water Flow Unt Answer History: (13,407, 13,007, 14,007, 14,007) *2.5 Cidd Water Flow Unt Answer History: (13,007, 14,007, 14,007) *2.6 Eintertial Generator Eo *2.7 Dump Plow: John Answer History: (15,007, 14,007, 14,007) *2.5 Button Temperature: F Answer Histor | Complete this step when ANY of the fo | llowing rules match. | (Decimal 2 Digit(s)) |
| #see: Cold Salt Tank KST-1 Bound Element #2 # form: Cold Salt Tank KST-1 Element #2 # 2.0 New Page (Decimal 2 Digits)) # 2.1 Leel Answer History: (#5.00°, #6.33°, #5.00°, #5.00°) (Decimal 2 Digits)) # 2.1 Leel Answer History: (#5.00°, #5.33°, #5.00°, #5.00°) (Decimal 2 Digits)) # 2.1 Leel Answer History: (#5.00°, #5.22°, #5.00°, #5.00°) (Decimal 2 Digits)) # 2.1 How Water Flow In Answer History: (#5.00°, #5.00°, #1.20°) (Decimal 2 Digits)) # 2.4 Cold Water Flow Out Answer History: (#5.00°, #3.00°, #4.00°) (Decimal 2 Digits)) # 2.4 Cold Water Flow Out Answer History: (#5.00°, #3.00°, #4.00°) (Decimal 2 Digits)) # 2.5 Cold Water Flow Out Answer History: (#5.00°, #3.00°, #4.00°) (Decimal 2 Digits)) # 2.5 Cold Water Flow Out Answer History: (#5.00°, #3.00°, #4.00°) (Decimal 2 Digits)) # 2.5 Cold Water Flow Out Answer History: (#5.00°, #3.00°, #4.00°) (Decimal 2 Digits)) # 2.5 Cold Water Flow Out Answer History: (#5.00°, #6.00°) (Decimal 2 Digits)) # 2.6 Cold Water Flow Out Answer History: (#5.00°, #6.00°) (Decimal 2 Digits)) # 3.6 Direct Answer History: (#5.00°, #6.00°) (Decimal 2 Digits)) (Decimal 2 Digits)) </td <td>Step 1.2 is answered.</td> <td></td> <td>(Decimar 2 Digit(S))</td> | Step 1.2 is answered. | | (Decimar 2 Digit(S)) |
| Form: Cold Salt Tank Form v2 20 New Page Point Page * 2.1 Level | Answer History: ("6.00", "12.00", "222.00" | ", "555.00", "222.22", "555.55", "200.00") | |
| Farme colors and pain Form 22 Element #2 2.0 Nov Page (Decimal 2 Digits)) * 2.1 How Page (Decimal 2 Digits)) * 2.2 How Vater Flow In Answer History: (F45.00; '55.27; '45.07; '56.07) (Decimal 2 Digits)) * 2.3 How Vater Flow In Answer History: (F45.00; '55.27; '45.07; '56.07) (Decimal 2 Digits)) * 2.3 How Vater Flow In Answer History: (F45.00; '56.27; '25.07; '26.07; '26.07) (Decimal 2 Digits)) * 2.4 Cold Water Flow Ut Answer History: (F45.00; '56.07; '26 | *Asset: Cold Salt Tank CST-1 | | |
| 2.0 New Page * 2.1 Level (Decimal 2 Digits) Answer History: (#5.00°, *6.33°, *5.02°, *65.00°) (Decimal 2 Digits) * 2.2 Hot Water Flow in (Decimal 2 Digits) Answer History: (#5.00°, *5.22°, *45.00°, *5.00°) (Decimal 2 Digits) * 2.3 Hot Water Flow Out (Decimal 2 Digits) Answer History: (#3.00°, *5.22°, *45.00°, *2.00°) (Decimal 2 Digits) * 2.4 Cold Water Flow In (Decimal 2 Digits) Answer History: (*3.40°, *3.65°, *25.00°, *2.00°) (Decimal 2 Digits) * 2.4 Cold Water Flow In (Decimal 2 Digits) Answer History: (*3.40°, *3.00°, *4.00°, *4.00°) (Decimal 2 Digits) * 2.6 Tempering Valve (Maswer Only One) * 2.6 Tempering Valve (Maswer Only One) * 2.7 Pump Rev - /min (Decimal 2 Digits) Answer History: (*3.60°, *8.00°, *6.00°) (Decimal 2 Digits) * 2.8 Tempering Valve Element #3 * 3.9 New Page (Decimal 2 Digits) * 3.1 Frequency (Answer Only One) * 3.3 Water Cooled In (Decimal 2 Digits) * 3.4 Vater Cooled In (Decimal 2 Digits) * 3.4 Control Panel Status (Orelinal | *Form: Cold Salt Tank Form v2 | | |
| * 2.1 Level Answer History: (#5.00", *5.00", *5.00") (Decimal 2 Digits)) * 2.2 Hot Water How in | 2.0 New Page | Liettient #2 | |
| Answer History: (18.00°, 166.33°, 15.00°, 15.00°) (Decimal 2 Digits) * 2.2 Hot Water Flow In (Decimal 2 Digits) Answer History: (16.00°, 15.22°, 145.00°, 15.00°) (Decimal 2 Digits) * 2.3 Hot Water Flow Out (Decimal 2 Digits) * 2.4 Cold Water Flow Out (Decimal 2 Digits) * 2.4 Cold Water Flow Out (Decimal 2 Digits) * 2.4 Cold Water Flow Out (Decimal 2 Digits) * 2.5 Cold Water Flow Out (Decimal 2 Digits) * 2.5 Cold Water Flow Out (Decimal 2 Digits) * 2.5 Cold Water Flow Out (Decimal 2 Digits) * 2.5 Cold Water Flow Out (Decimal 2 Digits) * 2.5 Cold Water Flow Out (Decimal 2 Digits) * 2.5 Cold Water Flow Out (Decimal 2 Digits) * 2.5 Tempering Valve (Decimal 2 Digits) * 2.5 Tempering Valve (Decimal 2 Digits) * 2.5 Dump Flow - Imin Answer History: (75.00°, 78.20°, 74.00°, 76.00°) Answer History: (75.00°, 78.20°, 74.00°, 76.00°) (Decimal 2 Digits) * 3.5 New Page Soft: Goht: (Answer Only One) * 3.5 New Page (Decimal 2 Digits) * 3.6 Control Panel Status (Decimal 2 Digits) * 3.6 Control Panel Status (Decimal 2 Digit | | | |
| *2.2 Hot Water Flow In (Decimal 2 Digits) *2.3 Hot Water Flow Out (Decimal 2 Digits) Answer History: (*6.00, *15.48; *14.00, *12.00*) (Decimal 2 Digits) *2.4 Hot Water Flow Out (Decimal 2 Digits) *2.4 Lot Water Flow Out (Decimal 2 Digits) *2.4 Cold Water Flow Out (Decimal 2 Digits) *2.4 Cold Water Flow Out (Decimal 2 Digits) *2.5 Cold Water Flow Out (Decimal 2 Digits) *2.6 Tempering Value (Decimal 2 Digits) *2.6 Tempering Value (Decimal 2 Digits) *2.6 Tempering Value (Decimal 2 Digits) *2.7 Pump Flow -Umin (Answer History: (*2.00, *2.33, *6.00*, *8.00*) *2.8 Botton Temperature - F Answer History: (*2.00*, *4.8.00*) *3.8 Botton Temperature - F (Decimal 2 Digits) *3.8 New Rega (Decimal 2 Digits) *3.1 Frequency (Soft::::66Hz) *3.2 New Rega (Decimal 2 Digits) *3.2 Water Cooled In (Decimal 2 Digits) Answer History: (*3.00*, *5.00*, *5.00*) (Decimal 2 Digits) *3.3 Water Cooled Out (Decimal 2 Digits) Answer History: (*3.00*, *5.00*, *25.00*, *24.00*) (Decimal 2 Digits) *3.4 Cont | | 1155 DOW | |
| Answer History: (*4.50°, *55.2°, *45.0°, *50°) (Decimal 2 Digit(5)) * 2.3 Hot Water Flow Out (Decimal 2 Digit(5)) Answer History: (*6.0°, *15.46°, *12.50°, *2.00°) (Decimal 2 Digit(5)) * 2.4 Cold Water Flow In (Decimal 2 Digit(5)) Answer History: (*4.0°, *26.65°, *25.0°, *2.0°) (Decimal 2 Digit(5)) * 2.5 Cold Water Flow Out (Decimal 2 Digit(5)) Answer History: (*3.0°, *43.0°, *40.0°, *40.0°) (Decimal 2 Digit(5)) * 2.6 Tempering Value (Decimal 2 Digit(5)) * 2.7 Pump Flow - Umin (Decimal 2 Digit(5)) Answer History: (*5.0°, *22.33°, *6.0°, *8.0°) (Decimal 2 Digit(5)) * 2.8 Botton Temperature - F (Decimal 2 Digit(5)) Answer History: (*5.0°, *75.0°, *40.0°, *45.0°) (Decimal 2 Digit(5)) * 3.8 Heat Cooled In (Answer History: (*5.0°, *65.0°, *45.0°, *56.0°) * 3.1 Frequency (Decimal 2 Digit(5)) * 3.2 Water Cooled In (Decimal 2 Digit(5)) Answer History: (*58.0°, *25.0°, *24.0°, *24.0°, *24.0°) (Decimal 2 Digit(5)) * 3.2 Water Cooled In (Decimal 2 Digit(5)) Answer History: (*58.0°, *25.0°, *24.0°, *24.0°, *26.0°) (Decimal 2 Digit(5)) * 3.4 Control Panel Status (Decimal 2 Digit(5)) < | Answer History: ("85.00", "66.33", "5.00" | , "סט.טכ"ן | (Decimal 2 Digit(s)) |
| Answer History: (*4.00°, *55.22°, *45.00°, *5.00°) (Decimal 2 Digit(5)) * 2.3 Hot Water Flow Out (Decimal 2 Digit(5)) Answer History: (*6.00°, *15.48°, *14.00°, *12.00°) (Decimal 2 Digit(5)) * 2.4 Cold Water Flow In (Decimal 2 Digit(5)) Answer History: (*6.00°, *26.65°, *25.00°, *20.00°, *40.00°, * | * 2.2 Hot Water Flow In | | |
| * 2.3 Hot Water Row Out | |)", "5.00") | |
| Answer History: (*69.00°, *15.48°, *14.00°, *12.00°) (Decimal 2 Digit(s)) *2.4 Cold Water Flow In (Decimal 2 Digit(s)) Answer History: (*7.00°, *26.65°, *25.00°, *2.00°) (Decimal 2 Digit(s)) *2.5 Cold Water Flow Out (Decimal 2 Digit(s)) Answer History: (*3.00°, *3.00°, *4.00°) (Decimal 2 Digit(s)) *2.6 Tempering Valve (Decimal 2 Digit(s)) *2.6 Tempering Valve (Decimal 2 Digit(s)) *2.8 Dotton Temperature - F (Decimal 2 Digit(s)) *3.0 New Page (Decimal 2 Digit(s)) *3.1 Frequency (Answer Only One) *3.2 Water Cooled In (Decimal 2 Digit(s)) *3.3 Water Cooled Out (Decimal 2 Digit(s)) *3.3 Water Cooled Out (Conser Only One) *3.4 Control Panel Status (Ok < NOK | | , , ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | (Decimal 2 Digit(s)) |
| *2.4 Cold Water Flow In (Decimal 2 Digits)) *2.5 Cold Water Flow Out (Decimal 2 Digits)) *2.5 Cold Water Flow Out (Decimal 2 Digits)) *2.5 Cold Water Flow Out (Decimal 2 Digits)) *2.6 Tempering Value Obk NOK (Knswer Only One) *2.7 Pump Flow - Umin Answer History: (75.00°, *26.00°, *8.00°) *2.8 Botton Temperature - F Answer History: (75.00°, *8.00°) *2.8 Botton Temperature - F Answer History: (75.00°, *8.00°) *2.8 Botton Temperature - F Element #3 3.0 New Flatory: (75.00°, *45.00°) (Decimal 2 Digit(s)) *3.1 Frequency (Decimal 2 Digit(s)) *3.1 Frequency (Decimal 2 Digit(s)) *3.3 New Flatory: (75.00°, *45.00°, *56.00°) (Decimal 2 Digit(s)) *3.3 Water Cooled In Answer History: (745.00°, *26.00°, *45.00°) *3.3 Water Cooled Out (Answer Only One) *3.4 Control Panel Status Ok NOK (Knswer Only One) *3.5 Specify: (Complete this step when ALL of the following rules match. Step 3.4 Is equal to "NOK". *3.6 Fuel Tank Level Answer History: "25.00°, *25.00°, *25.00°, *25.00°, *25.00°, *25.00°, *25.00°, *25.00°, *25.00°, *25.00°, *25.00°, *25.00°, *25.00°, *25.00°, *25.00°, *25.00°, *25.00°, *25.00°, *25. | * 2.3 Hot Water Flow Out | | |
| *2.4 Cold Water Flow In | Answer History: ("69.00", "15.48", "14.00 |)", "12.00") | (Decimal 2 Digit(s)) |
| Answer History: (*47.00°, *26.65°, *25.00°, *2.00°) (Decimal 2 Digit(s)) *2.5 Cold Water Flow Out (Decimal 2 Digit(s)) Answer History: (*34.00°, *33.00°, *43.00°, *43.00°) (Decimal 2 Digit(s)) *2.6 Tempering Valve (Decimal 2 Digit(s)) *2.7 Pump Flow - Umin (Decimal 2 Digit(s)) Answer History: (*25.00°, *22.33°, *5.00°, *8.00°) (Decimal 2 Digit(s)) *2.8 Botton Temperature - F (Decimal 2 Digit(s)) Answer History: (*25.00°, *45.00°, *4.00°) (Decimal 2 Digit(s)) *4.85E Electrical Generator Forn v2 (Decimal 2 Digit(s)) 3.0 New Page Softz_Goftz *3.1 Frequency (Answer Only One) *3.2 Water Cooled In (Decimal 2 Digit(s)) Answer History: (*45.00°, *25.00°, *45.00°, *45.00°) (Decimal 2 Digit(s)) *3.3 Water Cooled Out (Decimal 2 Digit(s)) *3.3 Water Cooled Out (Decimal 2 Digit(s)) *3.4 Control Panel Status (Decimal 2 Digit(s)) *3.5 Specify: (Decimal 2 Digit(s)) Complete this step when ALL of the following rules match. (Text) *3.5 Specify: (Decimal 2 Digit(s)) *3.5 Specify: (Decimal 2 Digit(s)) <td></td> <td></td> <td>(</td> | | | (|
| *2.5 Cold Water Flow Out (Decimal 2 Digit(s)) *2.6 Tempering Valve (Decimal 2 Digit(s)) *2.7 Pump Flow - Umin (Decimal 2 Digit(s)) Answer History: (75.00, "8.20, "4.00," *8.00") (Decimal 2 Digit(s)) *2.8 Botton Temperature - F (Decimal 2 Digit(s)) Answer History: (75.00, "8.20, "4.00," *45.00") (Decimal 2 Digit(s)) Max: (140)) *Asset: Electrical Generator EG-1 (Enemet #3) *13.1 Frequency SoHz GoHz *3.2 Water Cooled In (Answer History: (*45.00", *45.00") Answer History: (*45.00", *25.00", *24.00", *24.00") (Decimal 2 Digit(s)) *3.4 Control Panel Status (Onet and 2 Digit(s)) *3.4 Control Panel Status (Inext) *3.5 Specify: (Complete this step when ALL of the following rules match. Step 3.4 is equal to "NOK". (Text) *3.6 Fuel Tank Level (Decimal 2 Digit(s)) *3.6 Fuel Tank Level (Decimal 2 Digit(s)) *3.7 Container 20 Feet 40 Feet | | | |
| Answer History: ("34.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "63.00", "43.00", | Answer History: ("47.00", "26.65", "25.00 | ", "2.00") | (Decimal 2 Digit(s)) |
| Answer History: ("34.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "43.00", "63.00", "43.00", | * 2 5 Cold Water Flow Out | | |
| * 2.6 Tempering Valve (Decimal 2 Digit(s)) * 2.6 Tempering Valve (Decimal 2 Digit(s)) * 2.7 Pump Flow - Umin Answer History: ("25.00", "22.33", "6.00", "8.00") (Decimal 2 Digit(s)) * 2.8 Botton Temperature - F Answer History: ("75.00", "8.20", "4.00", "45.00") (Decimal 2 Digit(s) Max: (140)) *Asset: Electrical Generator EG-1 (Decimal 2 Digit(s) Max: (140)) *Form: Electrical Generator Form V2 3.0 New Page Softz _Goftz (Answer Only One) *3.1 Frequency Softz _Goftz (Answer Only One) (Decimal 2 Digit(s)) *3.2 Water Cooled In Answer History: ("58.00", "65.00", "45.00") (Decimal 2 Digit(s)) *3.3 Water Cooled Out (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) *3.4 Control Panel Status (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) *3.4 Control Panel Status (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) *3.3 Equal to "NOK". (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) *3.4 Control Panel Status (Decimal 2 Digit(s)) | | N | |
| Image: state in the state | Answer Instory. (34.00 , 35.00 , 45.00 | , 4.00) | (Decimal 2 Digit(s)) |
| • 2.7 Pump Flow - Imin | * 2.6 Tempering Valve | | |
| Answer History: ("25.00", "22.33", "6.00", "8.00") (Decimal 2 Digit(s)) * 2.8 Botton Temperature - F (Decimal 2 Digit(s)) Answer History: ("75.00", "78.20", "4.00", "45.00") (Decimal 2 Digit(s) Max: (140)) *Asset: Electrical Generator EG-1 Round *Form: Electrical Generator Form v2 Image: Complete History: ("58.00", "65.00", "45.00") 3.0 New Page Image: Complete History: ("58.00", "65.00", "45.00") * 3.1 Frequency (Answer Only One) * 3.2 Water Cooled In Image: Complete History: ("58.00", "65.00", "45.00", "56.00") Answer History: ("45.00", "25.00", "24.00", "24.00") (Decimal 2 Digit(s)) * 3.3 Water Cooled Out Image: Complete History: ("45.00", "25.00", "24.00", "24.00") * 3.4 Control Panel Status Image: Complete History: ("24.00", "25.00", "24.00") * 3.5 Specify: Image: Complete History: ("24.00", "256.00", "452.00") * 3.6 Fuel Tank Level Image: Complete History: ("24.00", "256.00", "452.00") * 3.6 Fuel Tank Level Image: Complete Line History: ("24.00", "256.00", "452.00") * 3.7 Container Image: Complete Line History: ("24.00", "256.00", "452.00") | | | (Answer Only One) |
| Answer History: ("25.00", "22.33", "6.00", "8.00") (Decimal 2 Digit(s)) * 2.8 Botton Temperature - F (Decimal 2 Digit(s)) Answer History: ("75.00", "78.20", "4.00", "45.00") (Decimal 2 Digit(s) Max: (140)) *Asset: Electrical Generator EG-1 Round *Form: Electrical Generator Form v2 Image: Complete History: ("58.00", "65.00", "45.00") 3.0 New Page Image: Complete History: ("58.00", "65.00", "45.00") * 3.1 Frequency (Answer Only One) * 3.2 Water Cooled In Image: Complete History: ("58.00", "65.00", "45.00", "56.00") Answer History: ("45.00", "25.00", "24.00", "24.00") (Decimal 2 Digit(s)) * 3.3 Water Cooled Out Image: Complete History: ("45.00", "25.00", "24.00", "24.00") * 3.4 Control Panel Status Image: Complete History: ("24.00", "25.00", "24.00") * 3.5 Specify: Image: Complete History: ("24.00", "256.00", "452.00") * 3.6 Fuel Tank Level Image: Complete History: ("24.00", "256.00", "452.00") * 3.6 Fuel Tank Level Image: Complete Line History: ("24.00", "256.00", "452.00") * 3.7 Container Image: Complete Line History: ("24.00", "256.00", "452.00") | * 2.7 Pump Flow - //min | | |
| *2.8 Botton Temperature - F Answer History: ("75.00", "78.20", "4.00", "45.00") *Asset: Electrical Generator EG-1 *Form: Electrical Generator EG-1 *Form: Electrical Generator Form v2 3.0 New Page *3.1 Frequency *3.1 Frequency *3.2 Water Cooled in Answer History: ("58.00", "65.00", "45.00", "56.00") *3.3 Water Cooled out Answer History: ("55.00", "25.00", "24.00", "24.00") *3.4 Control Panel Status *3.5 Specify: Complete this step when ALL of the following rules match. Step 3.4 is equal to "NOK". *3.6 Fuel Tank Level Answer History: ("224.00", "256.00", "452.00") *3.6 Fuel Tank Level Answer History: ("224.00", "256.00", "452.00") *3.6 Fuel Tank Level Answer History: ("224.00", "256.00", "452.00") *3.7 Container | | . "8.00") | |
| Answer History: ("75.00", "78.20", "4.00", "45.00") (Decimal 2 Digit(s) Max: (140)) *Asset: Electrical Generator EG-1 *Form: Electrical Generator Form V2 Element #3 3.0 New Page \$S0Hz 60Hz (Answer Only One) * 3.1 Frequency \$S0Hz 60Hz (Answer Only One) * 3.2 Water Cooled In Answer History: ("58.00", "65.00", "45.00", "56.00") (Decimal 2 Digit(s)) * 3.3 Water Cooled Out (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) * 3.4 Control Panel Status OK NOK (Answer Only One) (Decimal 2 Digit(s)) * 3.5 Specify: (Text) (Text) Complete this step when ALL of the following rules match. Step 3.4 is equal to "NOK". (Text) (Decimal 2 Digit(s)) * 3.6 Fuel Tank Level (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) * 3.6 Fuel Tank Level (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) * 3.6 Fuel Tank Level (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) * 3.6 Fuel Tank Level (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) * 3.6 Fuel Tank Level (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) (Decimal 2 Digit(s)) <td></td> <td>, ,</td> <td>(Decimal 2 Digit(s))</td> | | , , | (Decimal 2 Digit(s)) |
| *Asset: Electrical Generator EG-1 *Form: Electrical Generator Form v2 3.0 New Page * 3.1 Frequency * 3.2 Water Cooled In Answer History: ("58.00", "65.00", "45.00", "56.00") * 3.2 Water Cooled Out Answer History: ("45.00", "25.00", "24.00") * 3.3 Water Cooled Out Answer History: ("45.00", "25.00", "24.00") * 3.4 Control Panel Status * 3.4 Control Panel Status Complete this step when ALL of the following rules match. Step 3.4 is equal to "NOK". * 3.6 Fuel Tank Level Answer History: ("224.00", "256.00", "452.00") * 3.7 Container Answer History: ("224.00", "256.00", "452.00") | * 2.8 Botton Temperature - F | | |
| *Asset: Electrical Generator EG-1 *Form: Electrical Generator Form v2 3.0 New Page * 3.1 Frequency * 3.2 Water Cooled In Answer History: ("58.00", "65.00", "45.00") * 3.2 Water Cooled In Answer History: ("58.00", "65.00", "45.00") (Decimal 2 Digit(s)) * 3.4 Control Panel Status (Answer Only One) * 3.5 Specify: Complete this step when ALL of the following rules match. Step 3.4 is equal to "NOK". * 3.6 Fuel Tank Level Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) * 3.7 Container (20 Feet 40 Feet | Answer History: ("75.00", "78.20", "4.00" | , "45.00") | (Decimal 2 Digit(s) Max: (140)) |
| *Form: Electrical Generator Form v2 | | | (Beennar 2 Bighta) max (146)) |
| * 3.0 New Page * 3.1 Frequency IsoHz GoHz (Answer Only One) * 3.2 Water Cooled In Answer History: ("58.00", "65.00", "45.00", "56.00") (Decimal 2 Digit(s)) * 3.3 Water Cooled Out Answer History: ("45.00", "25.00", "24.00", "24.00") (Decimal 2 Digit(s)) * 3.4 Control Panel Status Iok NOK (Answer Only One) * 3.5 Specify: Iok NOK (Answer Only One) Complete this step when ALL of the following rules match. Step 3.4 is equal to "NOK". I(Text) * 3.6 Fuel Tank Level Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) * 3.7 Container Iz0 Feet 40 Feet | | Round | |
| * 3.1 Frequency S0Hz 60Hz (Answer Only One) * 3.2 Water Cooled In Answer History: ("58.00", "65.00", "45.00", "56.00") (Decimal 2 Digit(s)) * 3.3 Water Cooled Out Answer History: ("45.00", "25.00", "24.00", "24.00") (Decimal 2 Digit(s)) * 3.4 Control Panel Status Ok NOK (Answer Only One) * 3.5 Specify: Complete this step when ALL of the following rules match. Step 3.4 is equal to "NOK". * 3.6 Fuel Tank Level Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) * 3.7 Container 20 Feet 40 Feet | | | |
| • 3.2 Water Cooled In (Answer Only One) • 3.2 Water Cooled In (Decimal 2 Digit(s)) • 3.3 Water Cooled Out (Decimal 2 Digit(s)) • 3.3 Water Cooled Out (Decimal 2 Digit(s)) • 3.4 Control Panel Status Ok NOK (Answer Only One) • 3.4 Control Panel Status Ok NOK (Answer Only One) • 3.5 Specify: (Decimal 2 Digit(s)) Complete this step when ALL of the following rules match. Step 3.4 is equal to "NOK". (Text) • 3.6 Fuel Tank Level Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) • 3.7 Container [20 Feet] 40 Feet] | 3.0 New Page | | |
| * 3.2 Water Cooled In (Decimal 2 Digit(s)) Answer History: ("58.00", "65.00", "45.00", "56.00") (Decimal 2 Digit(s)) * 3.3 Water Cooled Out (Decimal 2 Digit(s)) * 3.4 Control Panel Status (Decimal 2 Digit(s)) * 3.5 Specify: Ok NOK (Answer Only One) * 3.5 Specify: (Text) * 3.6 Fuel Tank Level (Text) Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) * 3.7 Container 20 Feet 40 Feet | * 3.1 Frequency | | 50Hz 60Hz |
| Answer History: ("58.00", "65.00", "45.00", "56.00") (Decimal 2 Digit(s)) * 3.3 Water Cooled Out (Decimal 2 Digit(s)) Answer History: ("45.00", "24.00", "24.00") (Decimal 2 Digit(s)) * 3.4 Control Panel Status Ook NOK (Answer Only One) * 3.5 Specify: (Decimal 2 Digit(s)) Complete this step when ALL of the following rules match. Step 3.4 is equal to "NOK". (Text) * 3.6 Fuel Tank Level Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) * 3.7 Container [20 Feet] 40 Feet] | | | (Answer Only One) |
| * 3.3 Water Cooled Out (Declinial 2 Digit(s)) * 3.3 Water Cooled Out (Declinial 2 Digit(s)) Answer History: ("45.00", "25.00", "24.00") (Declinial 2 Digit(s)) * 3.4 Control Panel Status Ook NOK (Answer Only One) * 3.5 Specify: (Declinial 2 Digit(s)) Complete this step when ALL of the following rules match. Step 3.4 is equal to "NOK". (Text) * 3.6 Fuel Tank Level Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) * 3.7 Container [20 Feet] 40 Feet | * 3.2 Water Cooled In | | |
| * 3.3 Water Cooled Out (Declinial 2 Digit(s)) * 3.3 Water Cooled Out (Declinial 2 Digit(s)) Answer History: ("45.00", "25.00", "24.00") (Declinial 2 Digit(s)) * 3.4 Control Panel Status Ook NOK (Answer Only One) * 3.5 Specify: (Declinial 2 Digit(s)) Complete this step when ALL of the following rules match. Step 3.4 is equal to "NOK". (Text) * 3.6 Fuel Tank Level Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) * 3.7 Container [20 Feet] 40 Feet | Answer History: ("58.00", "65.00", "45.00" |)", "56.00") | (Decimal 2 Disister) |
| Answer History: ("45.00", "25.00", "24.00") (Decimal 2 Digit(s)) * 3.4 Control Panel Status Ok NOK (Answer Only One) * 3.5 Specify: (Cecimal 2 Digit(s)) Complete this step when ALL of the following rules match. Step 3.4 is equal to "NOK". (Text) * 3.6 Fuel Tank Level Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) * 3.7 Container Intercent of the step o | | | (Decimai 2 Digit(s)) |
| * 3.4 Control Panel Status Ok NOK (Answer Only One) * 3.5 Specify: Complete this step when ALL of the following rules match. Step 3.4 is equal to "NOK". (Text) * 3.6 Fuel Tank Level Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) * 3.7 Container 20 Feet 40 Feet | * 3.3 Water Cooled Out | | |
| * 3.4 Control Panel Status Ook NOK (Answer Only One) * 3.5 Specify: Complete this step when ALL of the following rules match. Step 3.4 is equal to "NOK". (Text) * 3.6 Fuel Tank Level Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) * 3.7 Container 20 Feet 40 Feet | Answer History: ("45.00", "25.00", "24.00" |)", "24.00") | (Decimal 2 Digit(s)) |
| * 3.5 Specify: (Answer Only One) * 3.5 Specify: (Text) Complete this step when ALL of the following rules match. (Text) \$ 3.6 Fuel Tank Level (Decimal 2 Digit(s)) * 3.7 Container 20 Feet 40 Feet | | | |
| * 3.5 Specify: (Text) Complete this step when ALL of the following rules match. (Text) Step 3.4 is equal to "NOK". (Text) * 3.6 Fuel Tank Level (Decimal 2 Digit(s)) * 3.7 Container [20 Feet] 40 Feet | * 3.4 Control Panel Status | | |
| Complete this step when ALL of the following rules match. (Text) Step 3.4 is equal to "NOK". (Text) * 3.6 Fuel Tank Level (Decimal 2 Digit(s)) Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) * 3.7 Container 20 Feet 40 Feet | | | (Answer Only One) |
| Step 3.4 is equal to "NOK". (TeX.) * 3.6 Fuel Tank Level (Decimal 2 Digit(s)) Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) * 3.7 Container 20 Feet 40 Feet | * 3.5 Specify: | | |
| Step 3.4 is equal to "NOK". • 3.6 Fuel Tank Level Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) * 3.7 Container □ 20 Feet □ 40 Feet | | llowing rules match. | (Text) |
| Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) * 3.7 Container 20 Feet 40 Feet | Step 3.4 is equal to "NOK". | | |
| Answer History: ("224.00", "256.00", "452.00") (Decimal 2 Digit(s)) * 3.7 Container 20 Feet 40 Feet | * 3.6 Fuel Tank Level | | |
| *3.7 Container 2 Dign(5)) | | 6.00". "452.00") | |
| | | | (Decimal 2 Digit(s)) |
| | * 3.7 Container | | 20 Feet 40 Feet |
| | | | |
| | | | · |





The selected variant will be displayed with all Forms or Asset Forms associated with the round.

Print Blank Forms - By Asset

• Use the left navigation panel to view the hierarchical structure of your company's organization

| - Helios Solar | « | Helios Solar | / Plant 2 | | | | | | | |
|----------------|----------|--------------|------------|--------|--------|-------|---------------|-------|-------------|--------------------|
| Plant 1 | | Forms | Form Tools | Assets | Rounds | Tasks | External Tags | Users | User Groups | Plant 2 Properties |
| Plant 2 | | | | | | | | | | |

• Select the Assets Tab.

| New Ass | et Import Assets | | | | | | | Q Sear | rch |
|----------------|------------------|-----------------|-----------------|-----------------|-----------------|------------|-----------------|---------------|------|
| | Tag | Forms | Status | Class (1) | Area - 2 | Location 3 | Misc 4 | | |
| | Q Search | Q Search | Q Search | Q Search | Q Search | Q Search | Q Search | | Sear |
| 6 B | capacitor01 | 1 | In-Service | New Class 1 | Area 1 | Building 1 | South | ළ | Ô |
| 6 8 | capacitor02 | 1 | In-Service | New Class 1 | Area 1 | Building 1 | South | ረዓ | â |
| 6 0 | capacitor03 | 1 | In-Service | New Class 1 | Area 1 | Building 1 | South | ሮ | Ê |
| 6 Ð | capacitor04 | 1 | In-Service | New Class 1 | Area 1 | Building 1 | South | Ф | Ê |
| 6 Ð | capacitor05 | 1 | In-Service | New Class 1 | Area 1 | Building 1 | South | ረሳ | Ô |
| 6 ə | capacitor06 | 1 | In-Service | New Class 1 | Area 1 | Building 1 | South | ሮቧ | Ê |
| 6 B | capacitor07 | 1 | In-Service | New Class 1 | Area 1 | Building 1 | South | ረኅ | Ê |
| 6 0 | capacitor08 | 1 | In-Service | New Class 1 | Area 1 | Building 1 | South | ረዓ | Ô |
| 6 Ð | capacitor09 | 1 | In-Service | New Class 1 | Area 1 | Building 1 | South | ሮ | Ô |
| 6 B | capacitor10 | 1 | In-Service | New Class 1 | Area 1 | Building 1 | South | ሮ | Ê |
| 6 Ð | capacitor11 | 1 | In-Service | New Class 1 | Area 1 | Building 1 | South | ሮ | Ô |
| 6 ə | capacitor12 | 1 | In-Service | New Class 1 | Area 1 | Building 1 | South | ሮ | Ô |

The Assets page appears.

• Print a Blank Form by selecting 🖶 icon.

| Options | | | Close |
|---------|--|-------------------------|-------|
| | Asset: capacitor01 Storage Group: FASQA / Max / Plant / Bldg1 Current State: Nominal | Name: Date: Time: | |
| | Loading | | |

Asset information will be loaded and then the detail of the associated Forms.





| Asset: capacitor01 Storage Group: FASQA / Max / Plant / Bldg1 | | |
|--|-------|--|
| Current State: Nominal | | |
| | Time: | |
| Asset: capacitor01 | | |
| | 4-2-2 | |
| Form: Capacitor Form v6 1.0 New Page | | |
| 1.1 Instructions | | (View Document "2018214 PDF" Download Open) |
| * 1.2 Voltage | | |
| External Tags: Display Tag Name 01 | | (Default = "370") |
| | | (Decimal 2 Digit(s) Min: (0) Max: (1000)) |
| * 1.3 Life | | |
| External Tags: Display Tag Name 02 | | (Default = "60000") |
| | | (Decimal 2 Digit(s) Min: (0) Max: (100000)) |
| * 1.4 Height | | |
| External Tags: Display Tag Name 03 | | (Default = "3.15") |
| | | (Decimal 2 Digit(s) Min: (0) Max: (100)) |
| | | |
| * 1.5 Diameter | | |
| * 1.5 Diameter External Tags: Display Tag Name 04 | | (Default = "1.75") |

The user can include additional options in the view as *(Show External Tags, Show Answer History, Show Triggers, Show Details, Images Width)*. Move the mouse over options

| Options | | Close |
|--|----------------------------|-------|
| Display Format: ○Row Template ®Column Template ☑ Show External Tags | g1 Name: Date: Time: | |
| □ Show Answer History ☑ Show Triggers □ Show Details ☑ Show Images - Width: 200 | | |
| | | |

Print Blank Tasks

Use the left navigation panel to view the hierarchical structure of your company's organization

• Select the Tasks Tab.





| » | Helios Solar / | Plant 2 | | | | | | | |
|---|----------------|------------|--------|--------|-------|---------------|-------|-------------|--------------------|
| | Forms | Form Tools | Assets | Rounds | Tasks | External Tags | Users | User Groups | Plant 2 Properties |
| | | | | | | | | | |

The Tasks page appears.

• Print Blank Task by selecting 🖶 icon.

| Options | | | Close |
|---------|--|-------|-------|
| | ask: Bldg1 Operation Task | Name: | |
| | torage Group: FASQA / Max / Plant / Bldg1 urrent State: Published | Date: | |
| | | Time: | |
| | ssignees: ser 123 | | |
| Loa | ading | | |

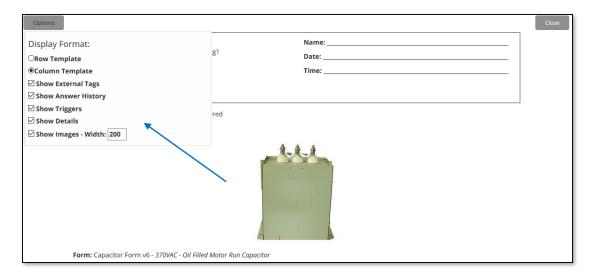
Task information is loaded and then the detail of the associated Round Variants, Assets and Forms.

| Options | Storage Group: FASQA / Max / Plant / Bldg1 Current State: Published | ame: ate: me: | Close |
|---------|--|--|-------|
| | Round: Bldg1 Operations Round - Scan Required Variant: Shift1 Asset: capacitor01 Form: Capacitor Form v6 - 370VAC - OII Filled Motor Run Capacitor 1.0 New Page | | |
| | 1.1 Instructions | (View Document "2018214 PDF" Download Open) | |
| | * 1.2 Voltage External Tags: Display Tag Name 01 Answer History: ("370.00", "370.00" | | |
| | * 1.3 Life - (Hours) External Tags: Display Tag Name 02 Answer History: ("60000.00", "6000000000, "600000, "60000, "60000, "600000, "60000, "60000, "600000, "60000, "60000, "60000, "60000, "6000,", "60000, "6000, "6000,", "60000, "6000,", "6000,", "6000,", "60000,", "60000,", "6000,", "6000,", "60000,", "60000,", "6000,", "6000,", "6000,",", "6000,",",",",",",",",",",",",",",",",", | | |





The user can include additional options in the view as (Show External Tags, Show Answer History, Show Triggers, Show Details, Images Width). Move the mouse over options



Copyright Notice

Information contained in this document is proprietary to SKF and may be used or disclosed only with written permission from SKF. This document, or any part thereof, may not be reproduced without the prior written permission of SKF.

This document refers to numerous products by their trade names, in most, if not all, cases these designations are Trademarks or Registered Trademarks by their respective companies.

This document and the related software described in this manual are supplied under license or nondisclosure agreement and may be used or copied only in accordance with the terms of the agreement. The information in this document is subject to change without notice and does not represent a commitment on the part of SKF.

The names of companies and individuals used in examples in the manuals, and in any sample databases provided, are fictitious and are intended to illustrate the use of the software. Any resemblance to actual organizations or individuals, whether past or present, is purely coincidental.