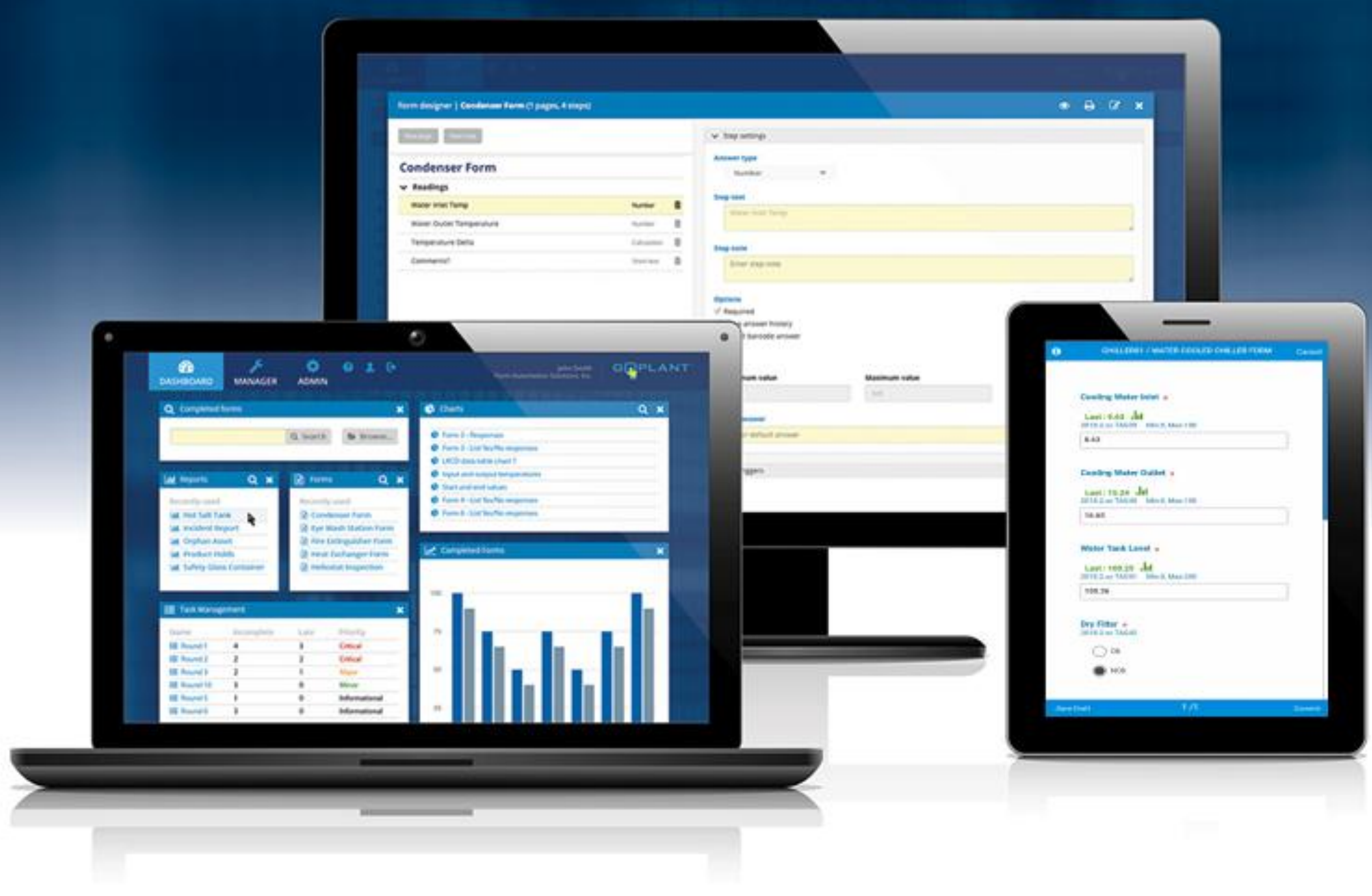
GoPlant User Manual

Version 2025.2



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Getting Started with GoPlant

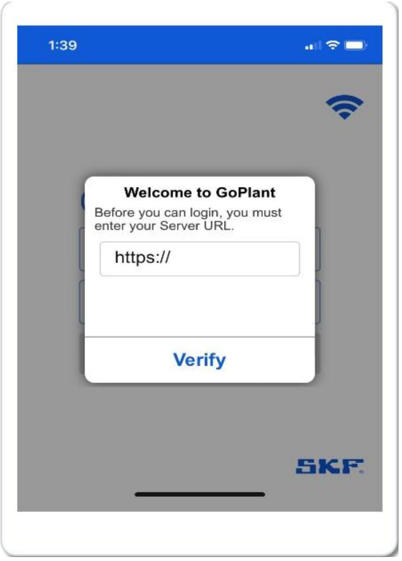
Online Client Startup

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 from the Apple and Android 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:

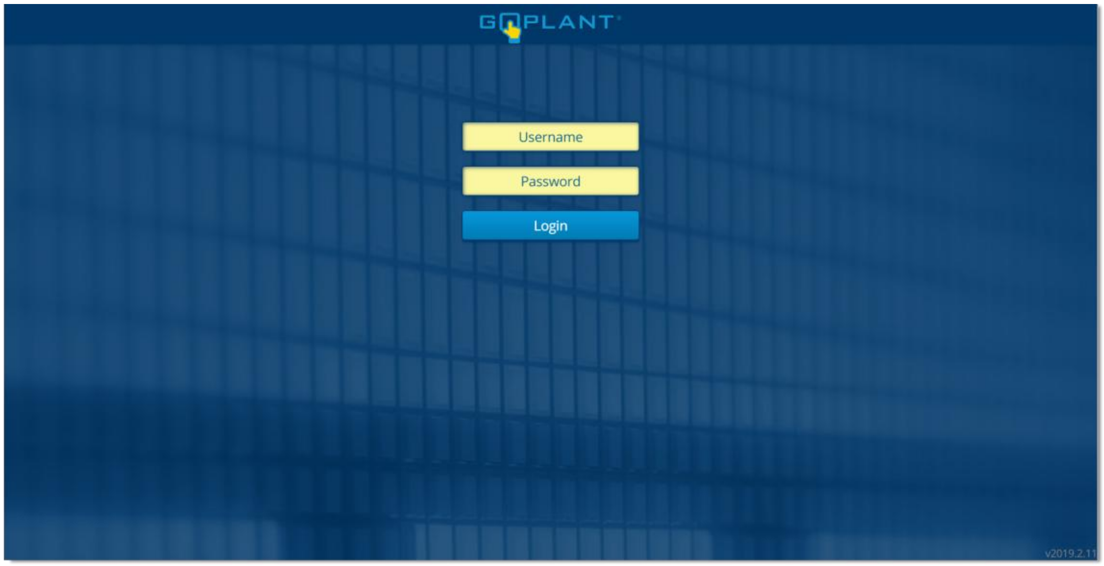


- Enter the **URL** associated with your GoPlant site in the dialog. You MUST have either http:// or https:// in addition to the GoPlant website URL that defines your system. For Hosted customers, it will be https:// (the default). For PREMISE customers, it could be either one.
- Press the blue Verify 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.

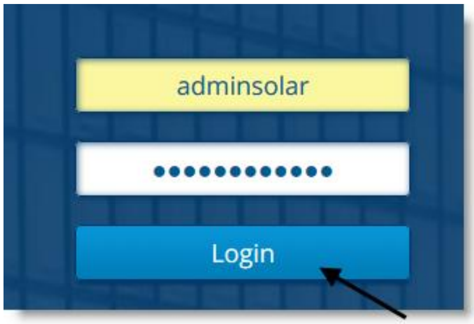
Using the Website Client

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

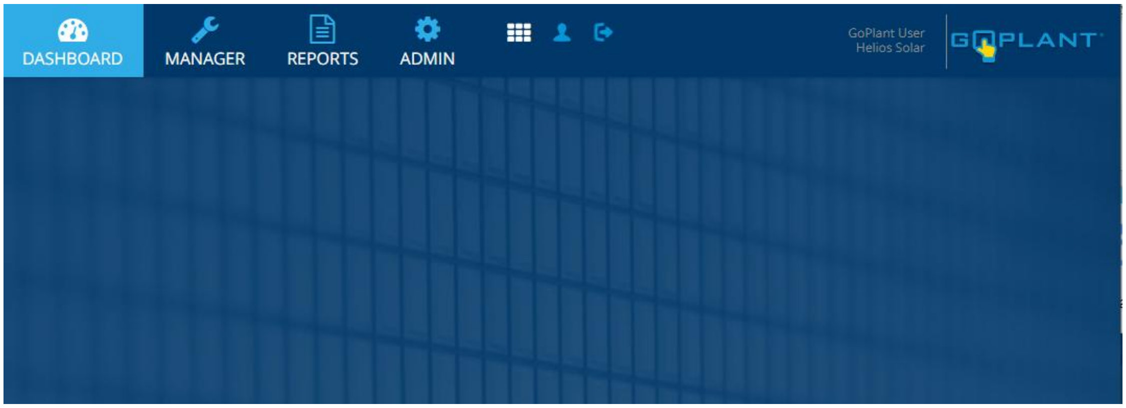
- Launch your desktop web browser and type your **GoPlant website URL** into the address bar (example: https://goplant). The **Login** page appears.



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

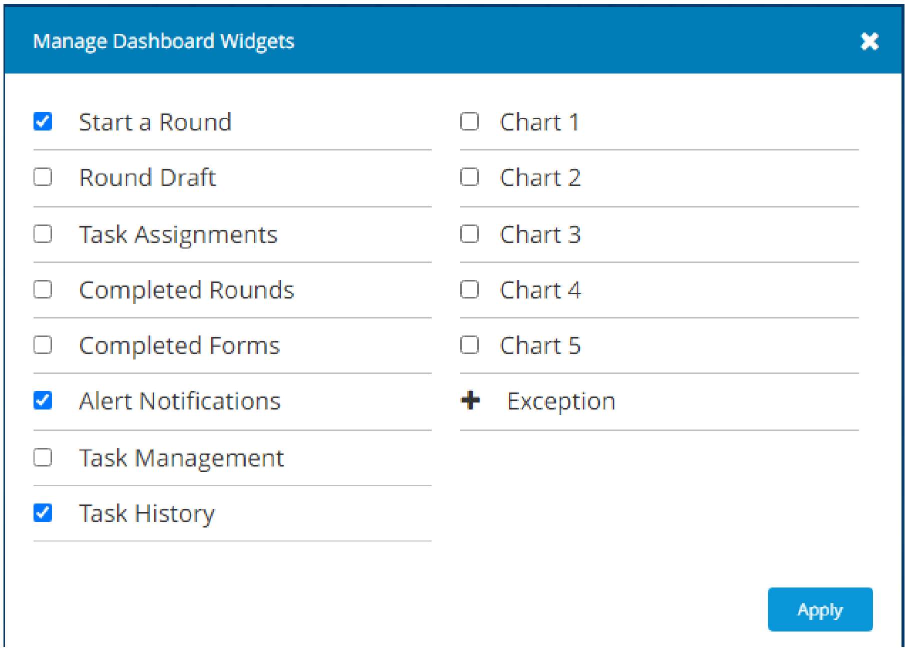


- Click **Login**. Your **GoPlant Dashboard** appears. Upon initial login, your dashboard will be empty until you customize the widgets you want displayed.



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

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



- 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.

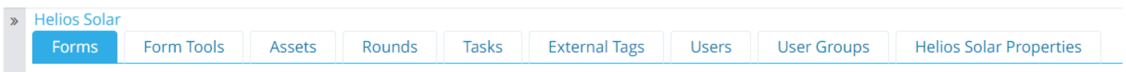
Widget Definitions:

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.
9. **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]*

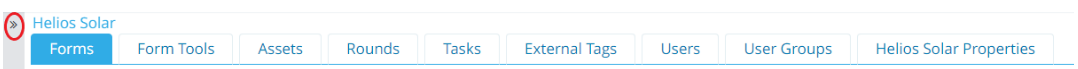
The GoPlant navigation bar is always visible at the top of the page. On the navigation bar, you will see one or more icons. These icons are representative of the user role(s) that have been assigned to you. If you have been given Admin or Editor privileges, you will see the Manager icon to the right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

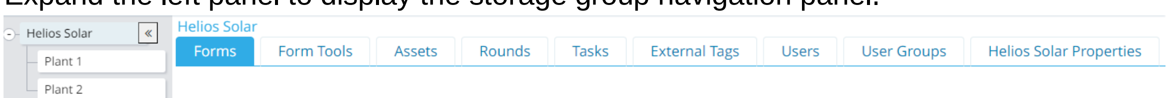


Note: Admin users will have access to all Manager Interface tabs and can manage users and the company hierarchy.

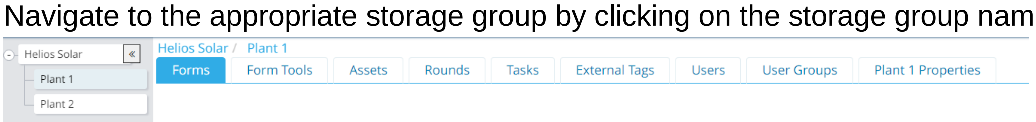
Note: Editor users will have access to Manager Interface tabs, but do not have the ability to manage users, user groups, and the storage group properties tabs.



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



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

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).

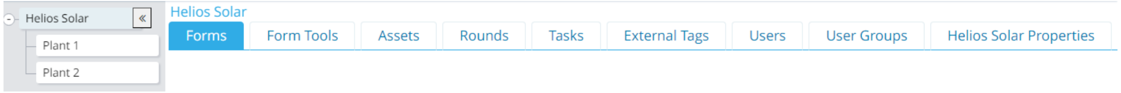
The Tabs change your viewpoint within GoPlant. Starting from far Right to Left:

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

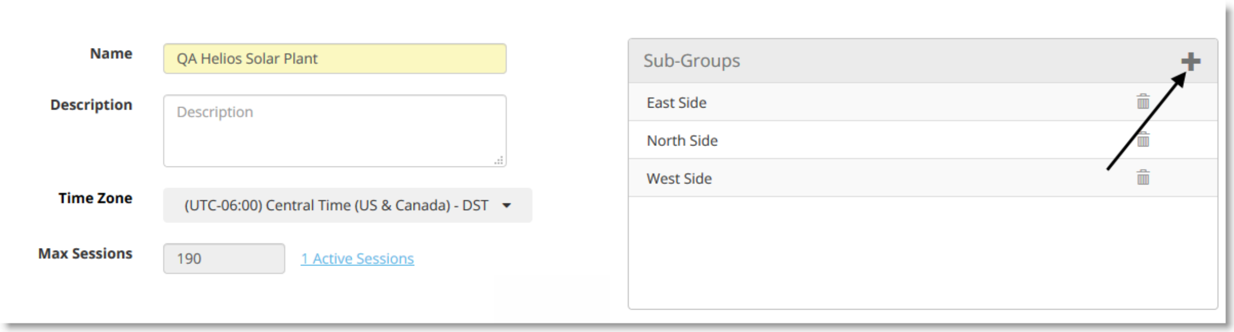
Storage Groups – the hierarchical structure *[Admin]*

- 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.



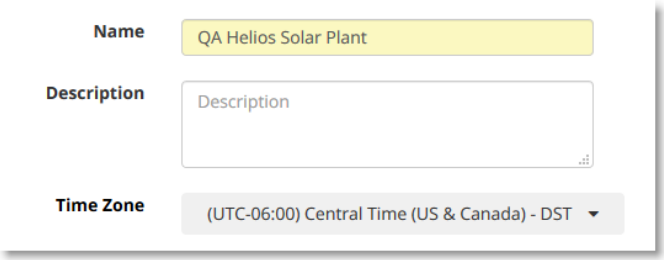
- Use the left navigation panel to view the hierarchical structure of your company's organization. As you build your structure, use this panel to select the appropriate sub-group where you plan to create, edit, add, and/or delete GoPlant items.

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



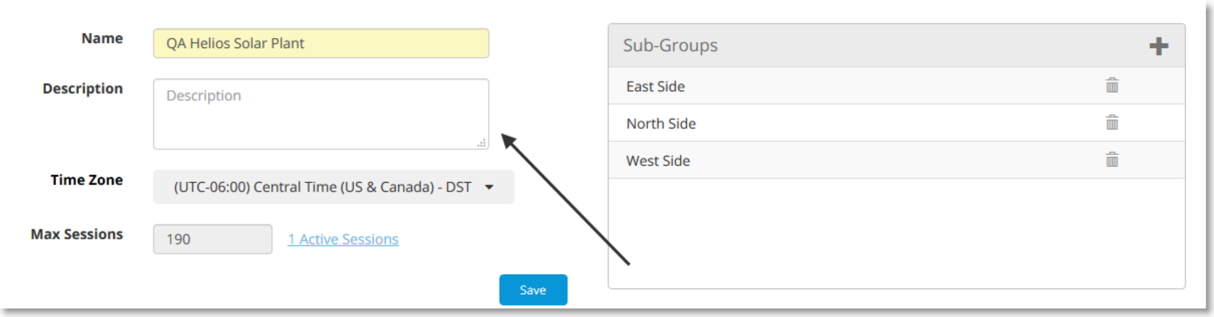
  - Create a new storage group (sub-group) by selecting the  icon.

The Add New Storage Group window opens.

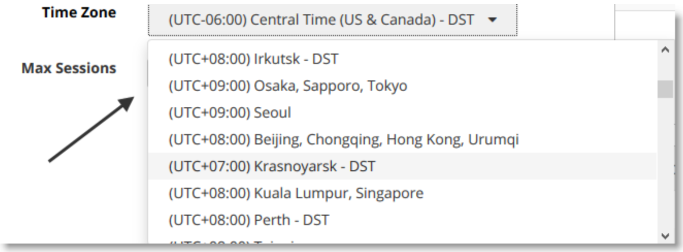


- Type the name of the group in **Name**.

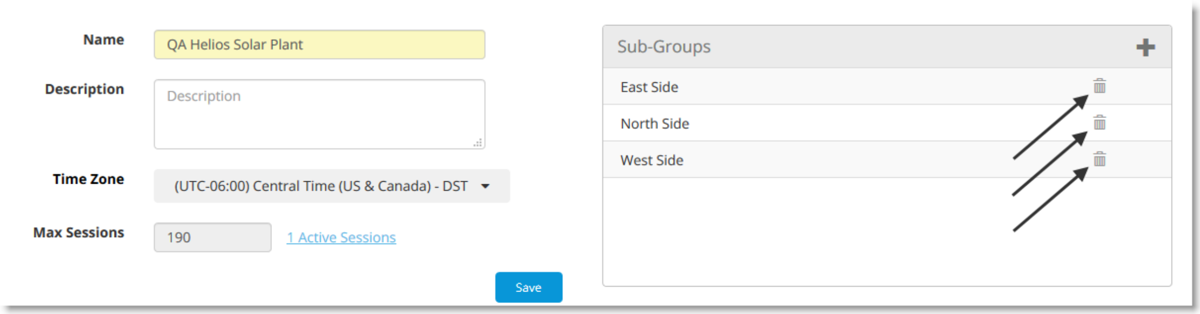
- Type in Description.
- Select the appropriate **Timezone**.
- Click **Save** to continue, or **Cancel** to exit without saving your changes.



- 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**.



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



- 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.

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.

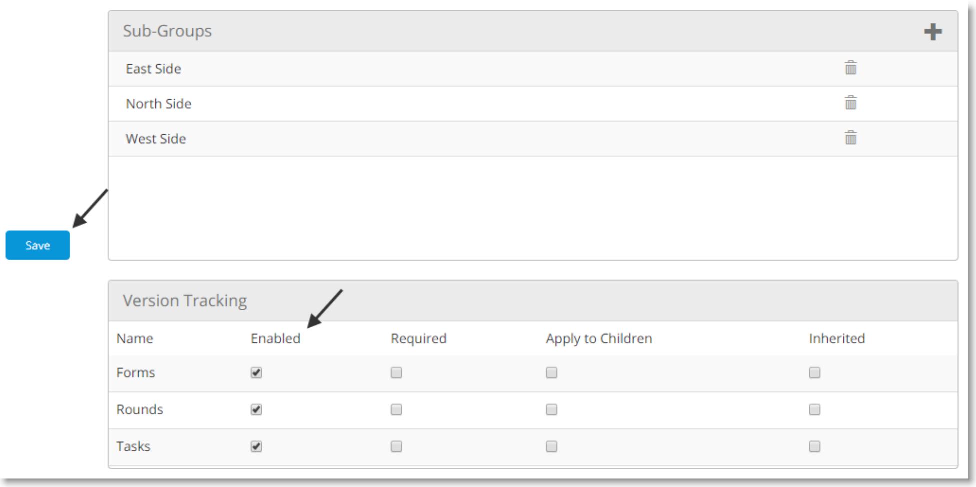
- **Enabled:** Allows The Users to add an optional Id and Log for each change in Forms, Rounds and Tasks (Optional).
- **Enabled and Required:** Allows The Users to add an optional Id and required Log entry for each change in Forms, Rounds and Tasks. User cannot save/publish the item without entering 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

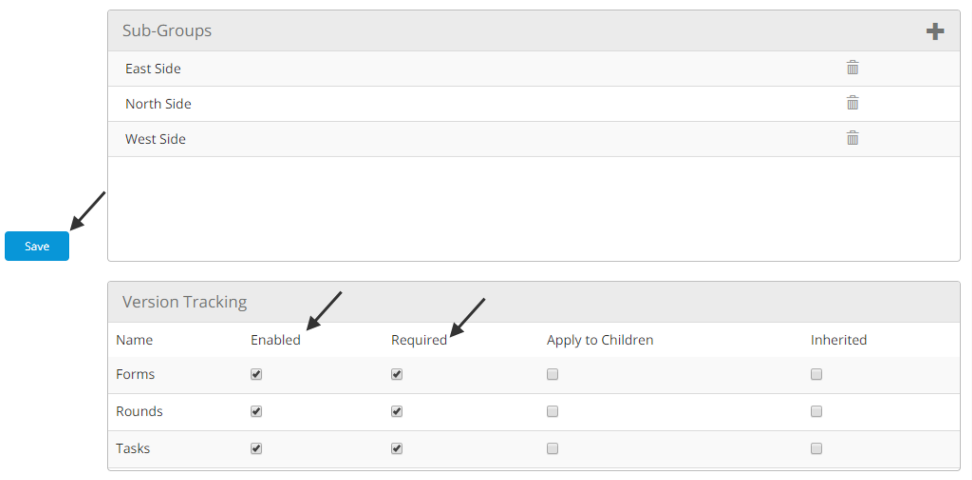
Name	Enabled	Required	Apply to Children	Inherited
Forms	☐	☐	☑	☐
Rounds	☐	☐	☑	☐
Tasks	☐	☐	☑	☐

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.

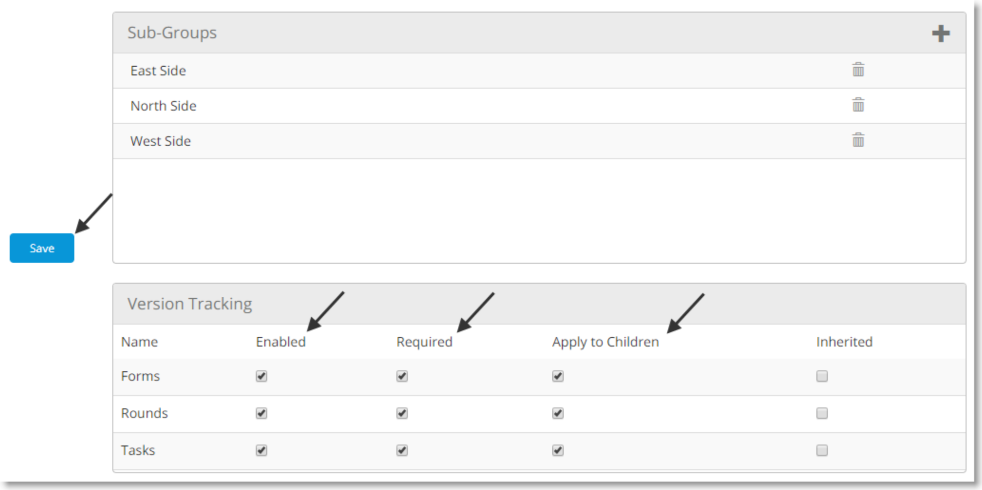


- Enabling Version Tracking adds the Log Entry and optional ID field to the Form Designer, Round Designer and Task Designer before each change.



- 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.

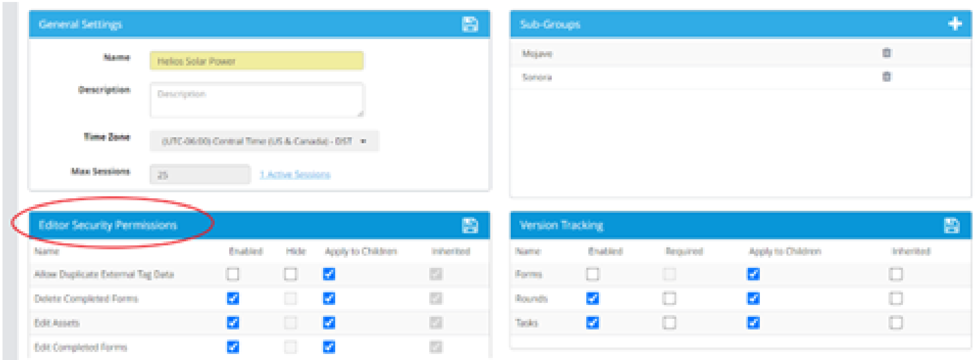


- The "Apply to Children" will push your settings to all children Storage Groups. Version Tracking settings can be changed at any Storage Group level. If you wish to reset the Version tracking rules simply select the "Inherited" checkbox and "Save" the information. This will clear out any storage group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



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 Permissions

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.

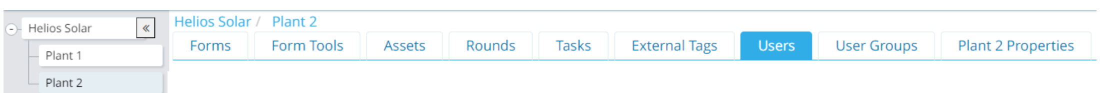
Adding Users *[Admin]*

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.

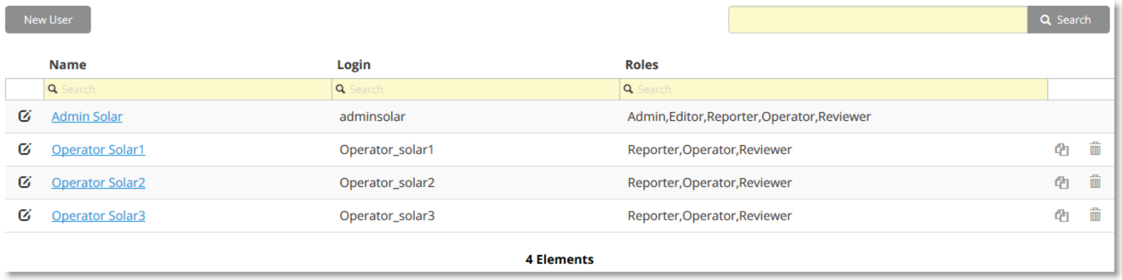
User Roles

- **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.

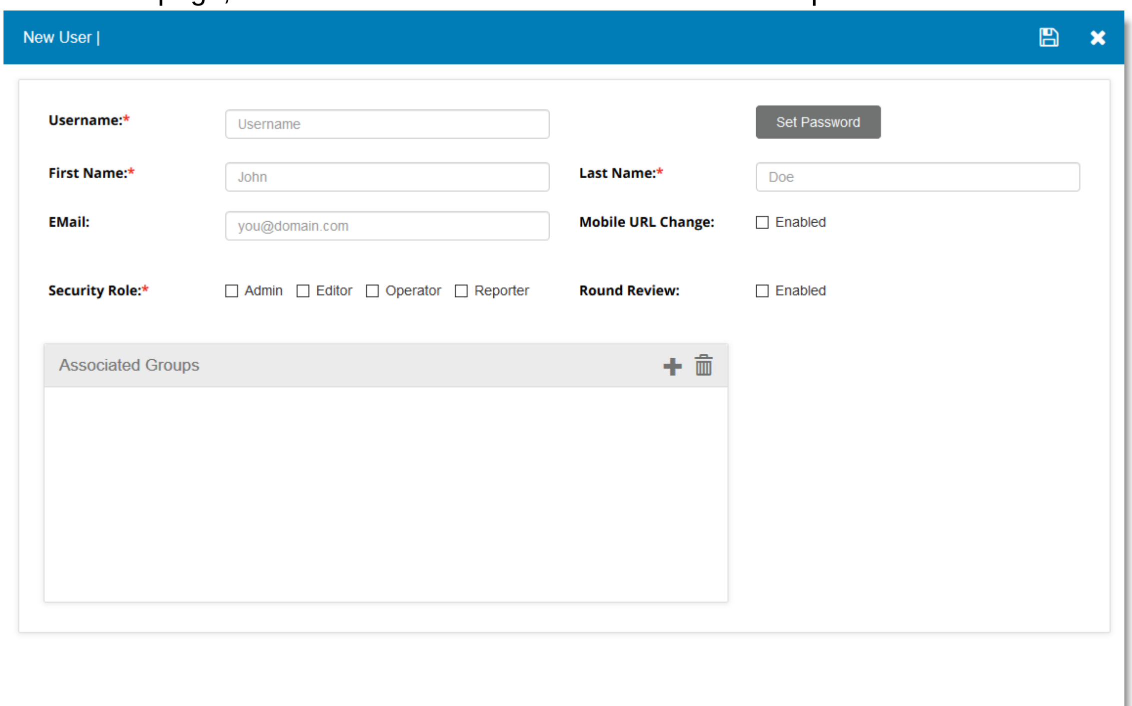
- Use the left navigation panel to view the hierarchical structure of your company's organization. As you add your users, use this panel to select a sub-group which will allow you to add users within it.



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



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



- 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.

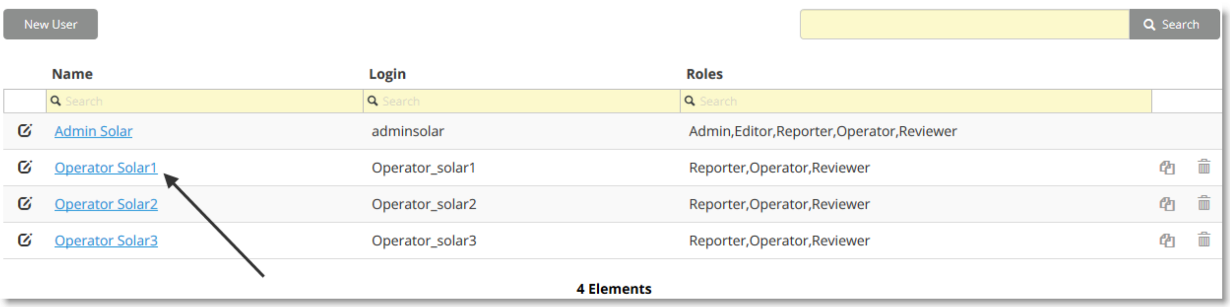
  c. **First Name (Required):** This field is used to type in a user's first name.
  d. **Last Name (Required):** This field is used to type in a user's first name.
  e. **Email:** This field is used to type in a user's primary email address. Note: This is the address that will be used in trigger alerts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

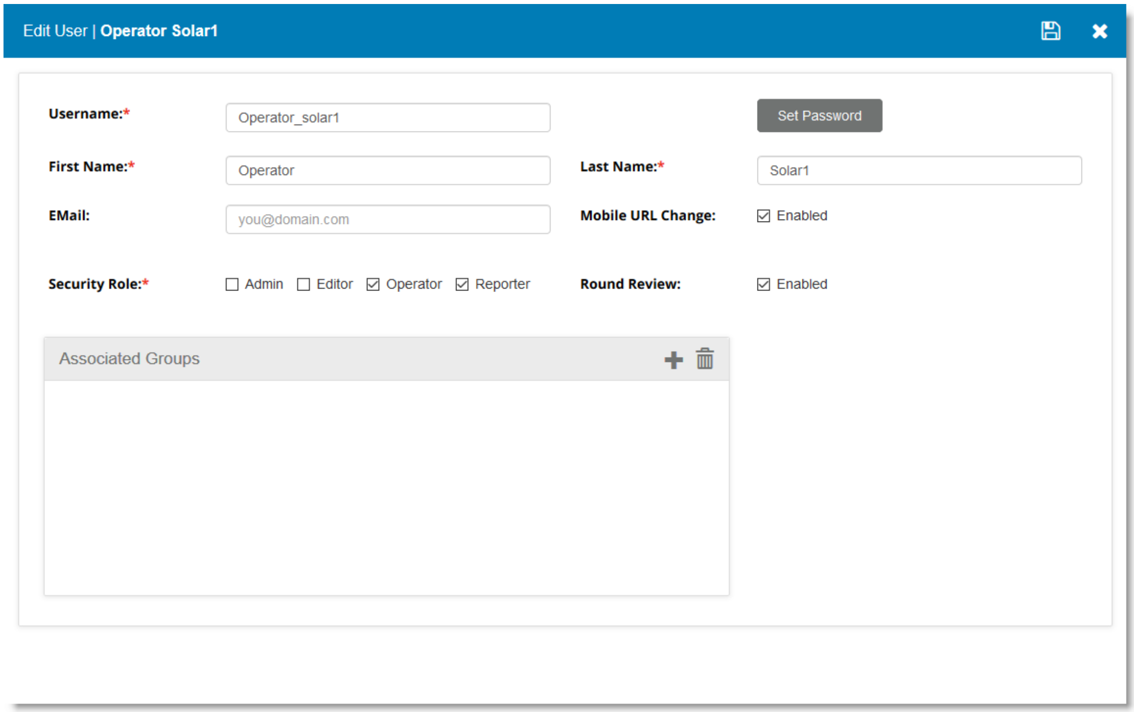
h. **Round Review:** Select the option to enable round review to allow the user the ability to perform supervisory reviews on completed rounds.

- **Associated Groups:** An admin user can associate users to managed user groups. In the Associated Groups panel, select ➕ to open the **Add** User Groups window.

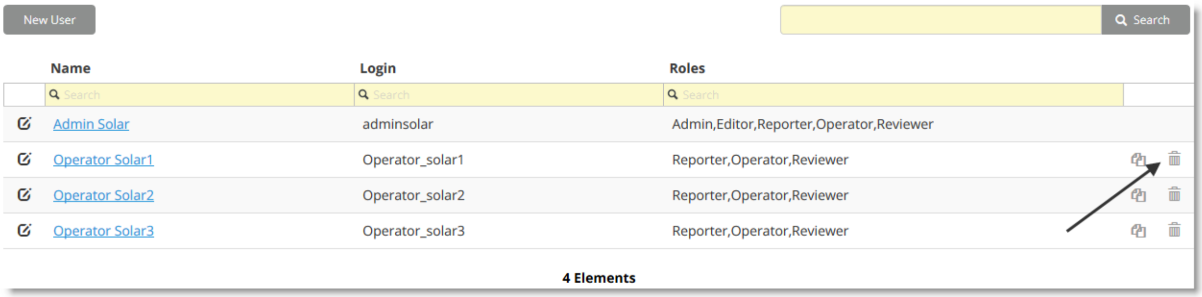


- Optional: To edit a user, on the **Users** page, select the name of the user you wish to edit or the **edit** icon next to the name.

The **Edit User** window will open:

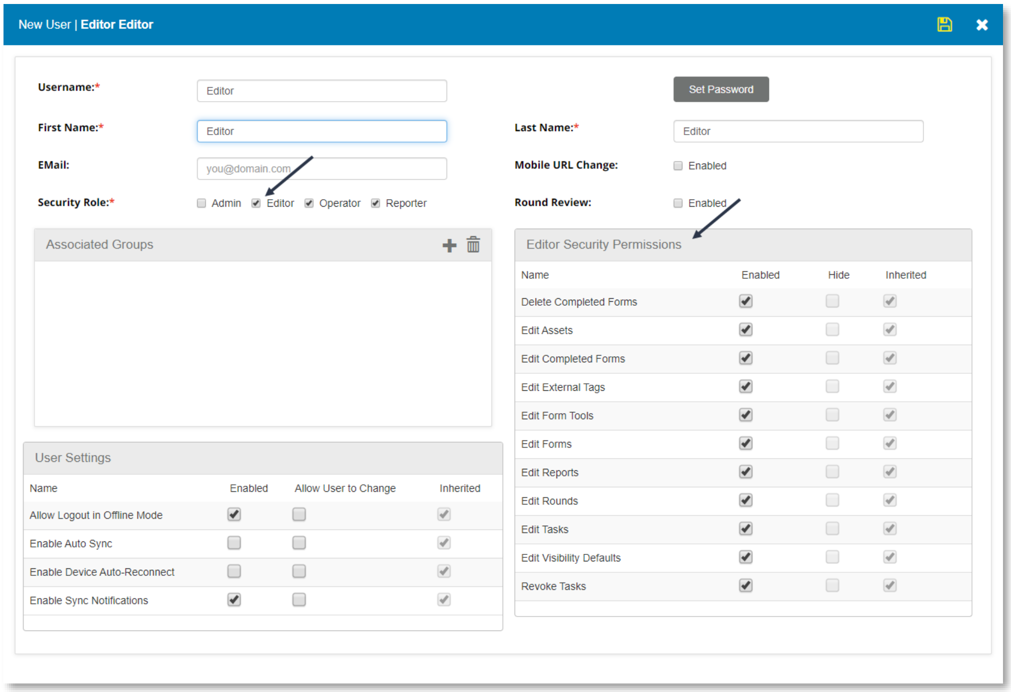


- Type in or edit the appropriate user information.



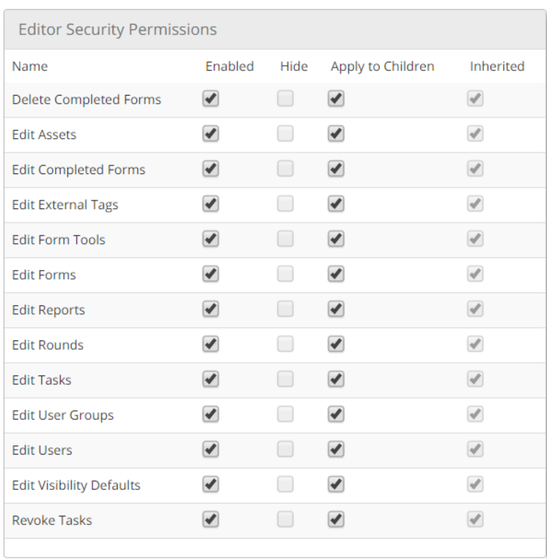
- Optional: To delete a user, on the **Users** page, select the **delete** icon next to the user you wish to delete.

- **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.



Editor Security Permissions available:

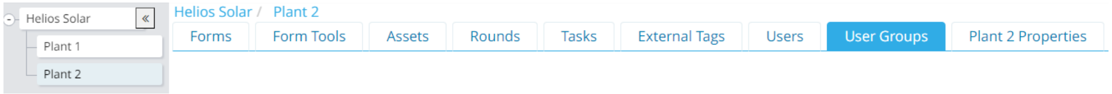
- **Delete Completed Forms:** Enables a user to delete an entire completed Form via the Completed Forms Browse widget.
- **Edit Assets:** Enables a user to create and modify Assets. This also includes moving and copying Assets.
- **Edit Completed Forms:** Enables a user to edit answers on a Completed 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.



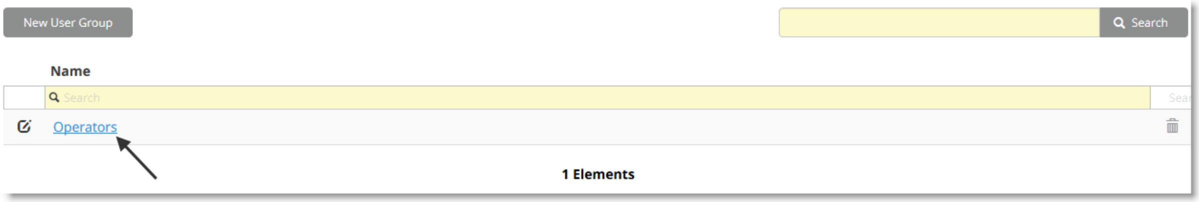
Adding User Groups and Associating Users *[Admin]*

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.

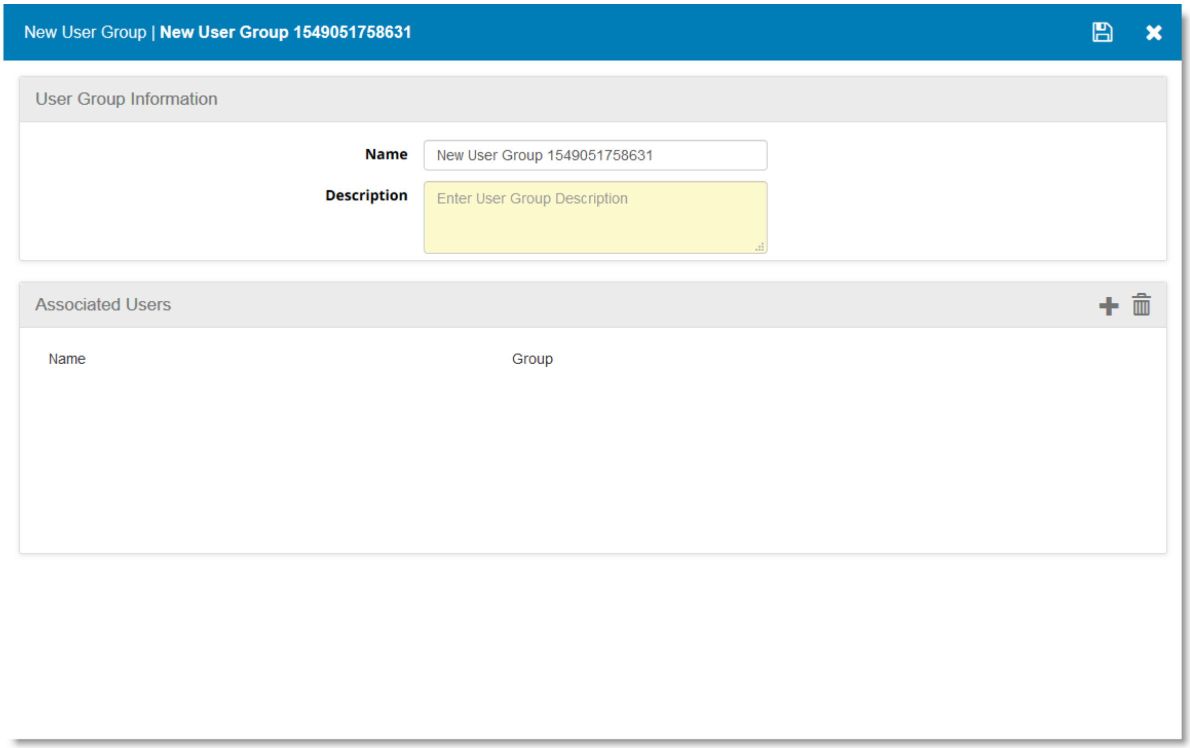
- Use the left navigation panel to view the hierarchical structure of your company's organization. As you add your user groups, use this panel to select a sub-group which will allow you to add user groups within it.



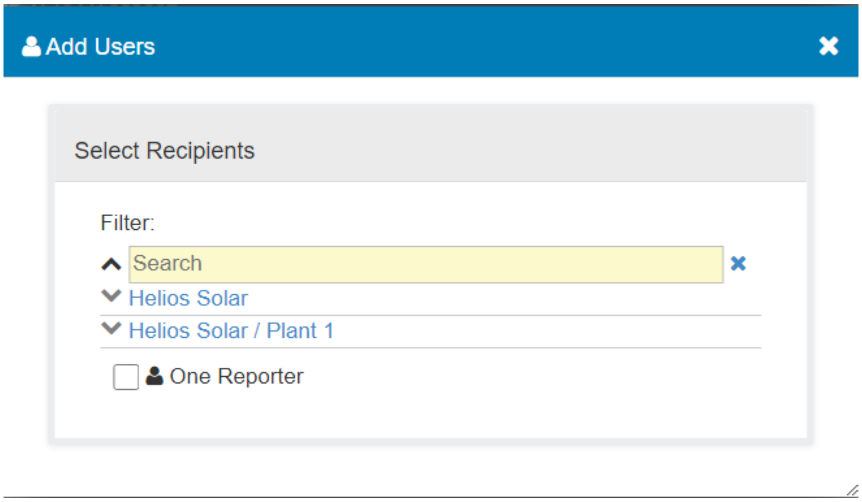
- Select the **User Groups** Tab. The **User Groups** page appears.



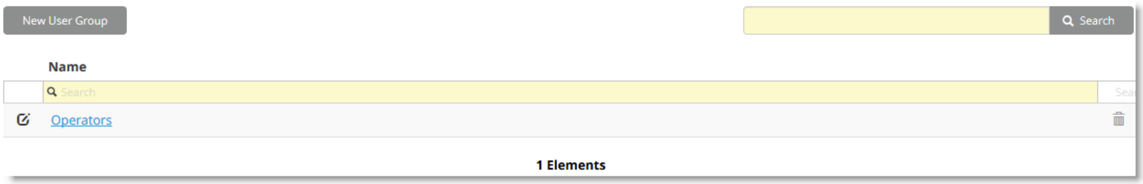
- On the **User Groups** page, select New user group . The **New User Group** page appears.



- 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.

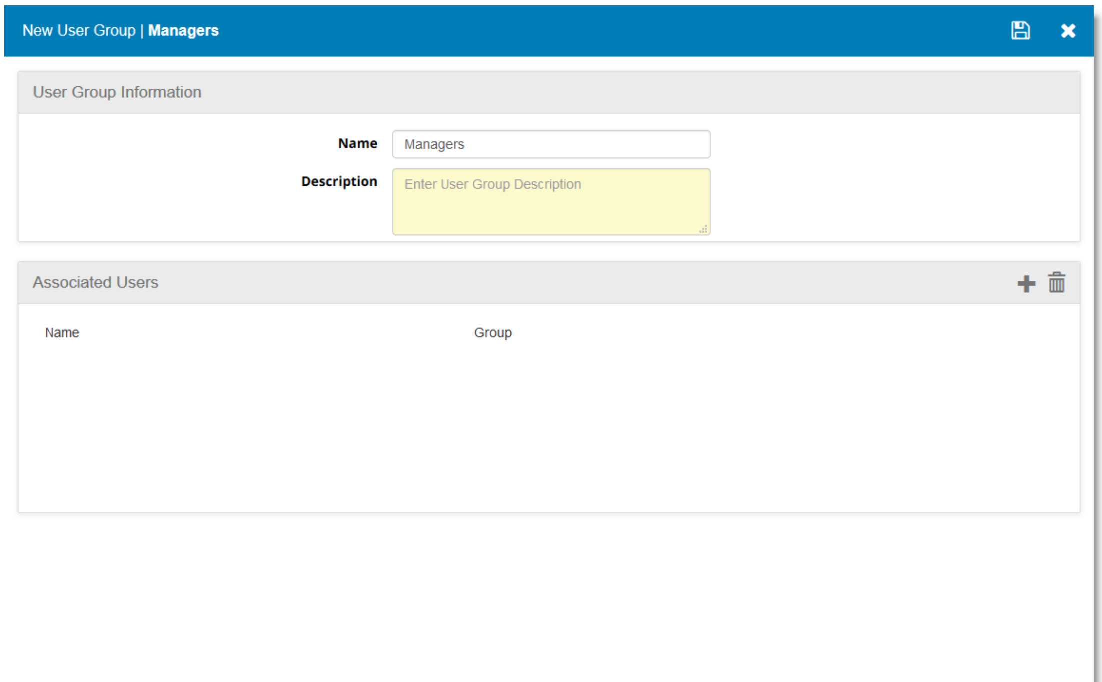


- Select the checkbox next to the user(s) in the list that you wish to add to the user group.
- Select **Apply** to continue, or to close the window without saving.
- Select to save your changes, or to close without saving.

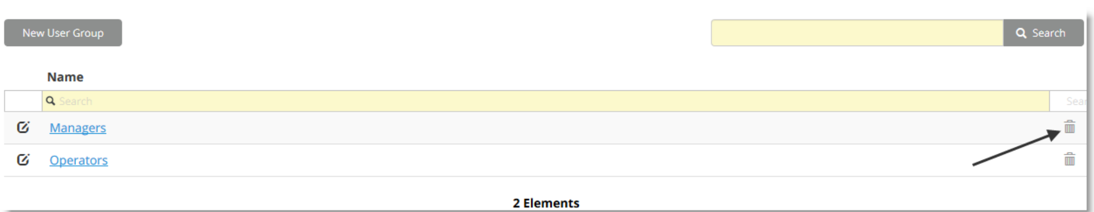


- Optional: To edit a user group, on the **User Groups** page, select the user group name in the list or next to the user group name.

The **Edit User Group** page appears.



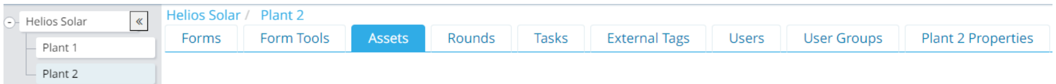
- Edit the appropriate user group information by typing in the **Name** and **Description** fields or selecting to add associated users or to delete associated users in the **Associated Users** panel.



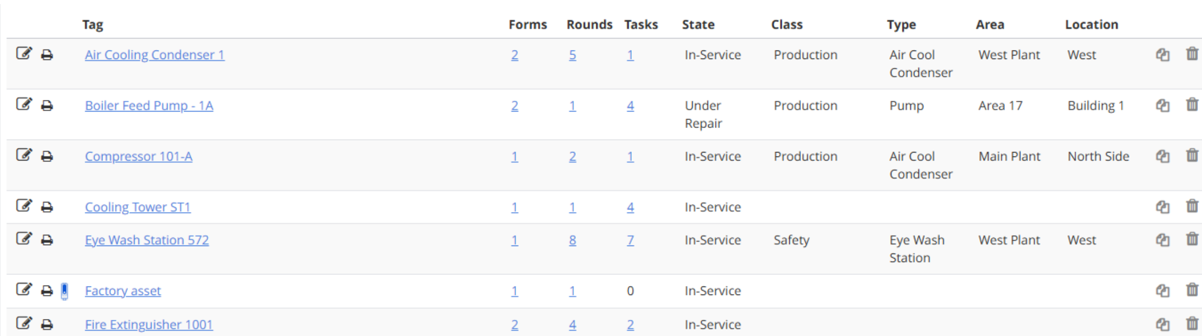
- Optional: To delete a user group, on the **User Groups** page, select on the row of the user group you wish to delete.

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.

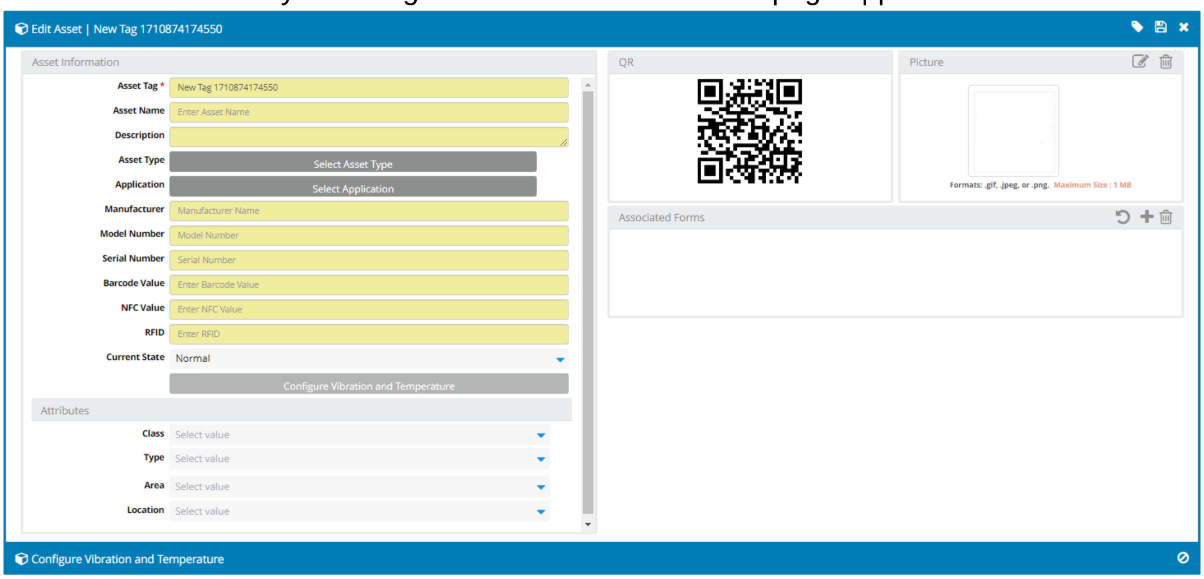


- Select the **Assets** Tab. The **Assets** window appears.



Tag	Forms	Rounds	Tasks	State	Class	Type	Area	Location
Air Cooling Condenser 1	2	5	1	In-Service	Production	Air Cool Condenser	West Plant	West
Boiler Feed Pump - 1A	2	1	4	Under Repair	Production	Pump	Area 17	Building 1
Compressor 101-A	1	2	1	In-Service	Production	Air Cool Condenser	Main Plant	North Side
Cooling Tower ST1	1	1	4	In-Service				
Eye Wash Station 572	1	8	7	In-Service	Safety	Eye Wash Station	West Plant	West
Factory asset	1	1	0	In-Service				
Fire Extinguisher 1001	2	4	2	In-Service				

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



- 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: 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: 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.

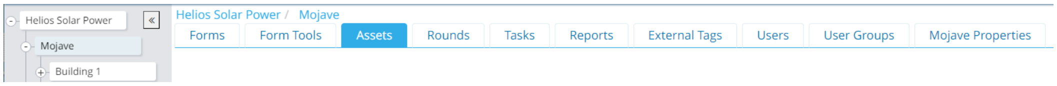
- Click to save the asset or click **X** to cancel creating the asset.

Asset Import [Admin, Editor]

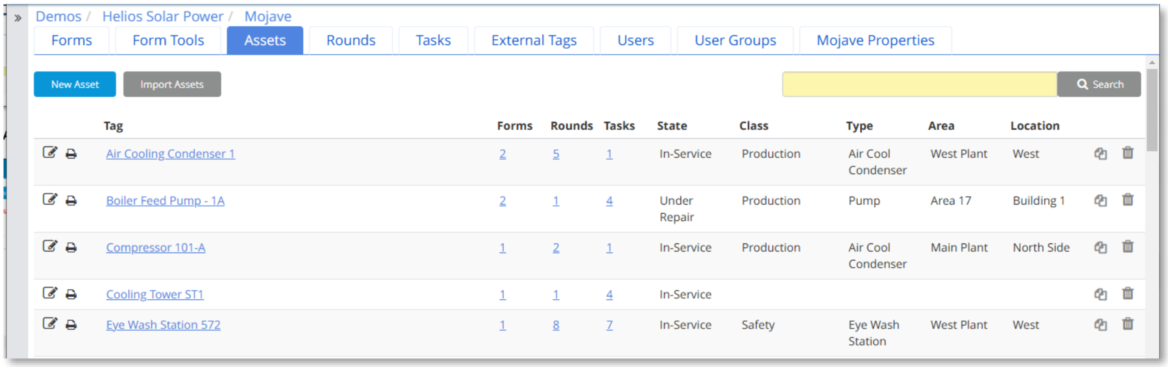
GoPlant Assets can also be created or modified using GoPlant Asset Import. This functionality allows an editor to define assets in a CSV file. When the file is imported, GoPlant checks the Asset Tag specified. If the Asset Tag matches an existing Asset, that Asset is updated based on the data specified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

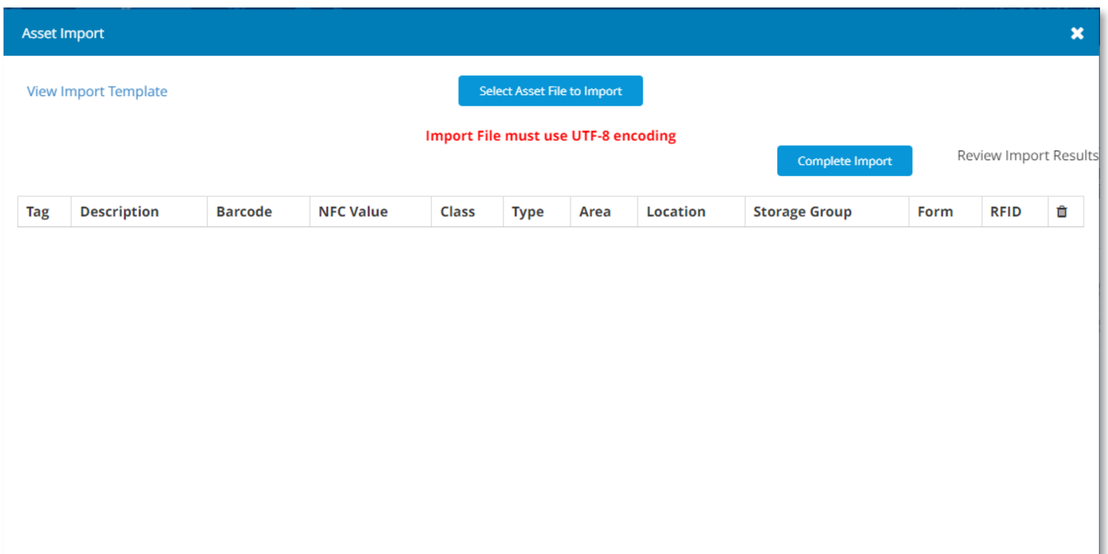
- Use the left navigation panel to view the hierarchical structure of your company's organization and select the Storage Group where you want to create new or modify existing Assets.



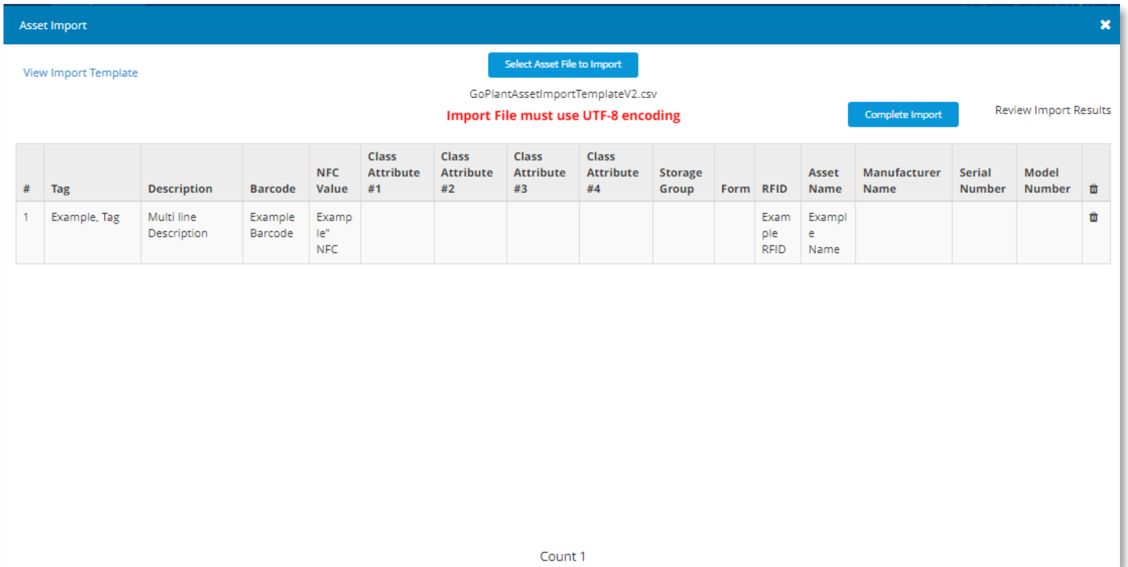
- Select the **Asset** Tab to navigate to the **Asset** page.



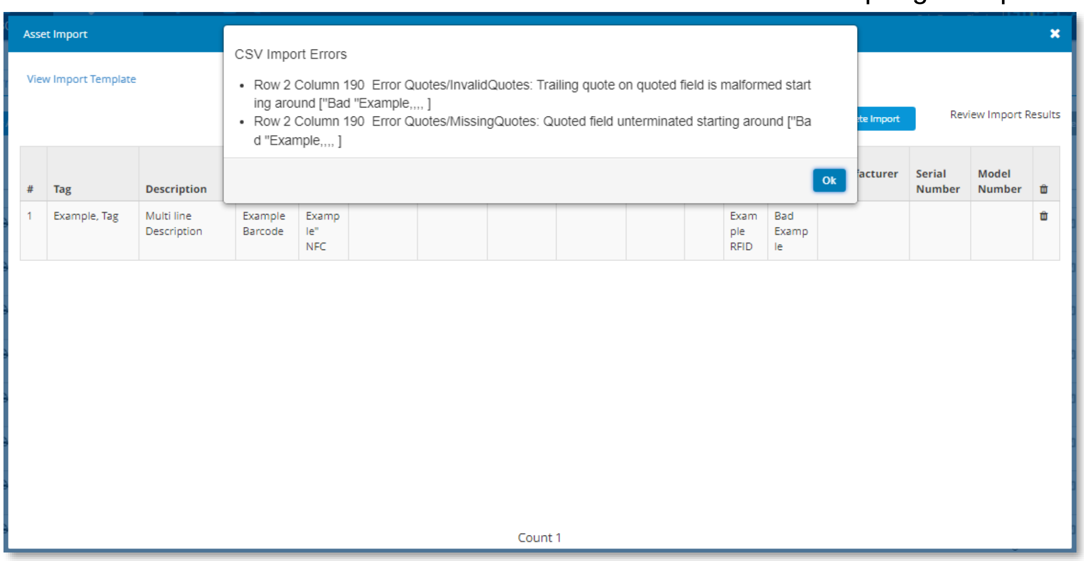
- Click the **Import Assets** button to bring up the **Asset Import** window.



- 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.



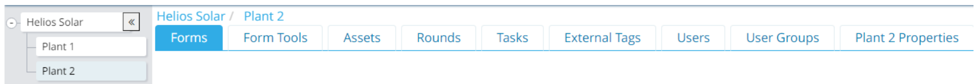
- If the csv file has validation issues a pop-up window will appear indicating the errors found. Each error will also display the row number within the file so that they can easily be corrected. Make a note or take a screenshot to remember all errors and fix them before attempting to import.



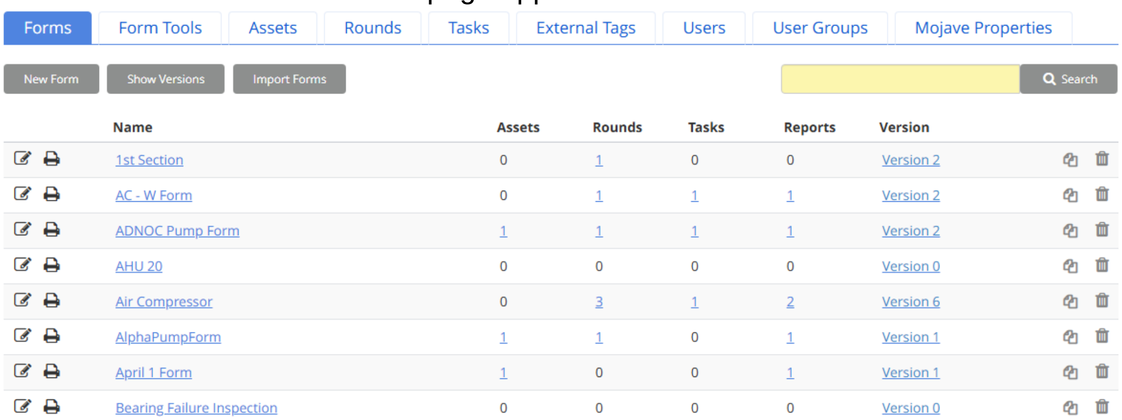
- Press "Complete Import" to complete the creation and or modification of Assets in the selected Storage Group

Building and Publishing Forms *[Admin, Editor]*

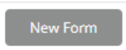
- Use the left navigation panel to view the hierarchical structure of your company's organization. As you add your forms, use this panel to select a sub-group which will allow you to add forms within it



- Select the **Forms** Tab. The **Forms** page appears.

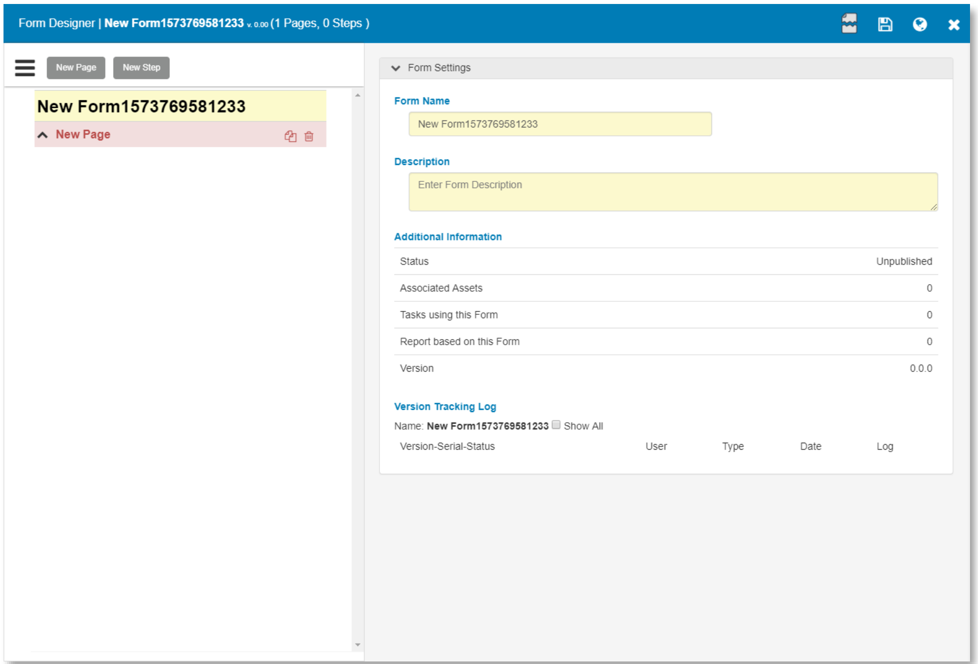


Name	Assets	Rounds	Tasks	Reports	Version
1st Section	0	1	0	0	Version 2
AC - W Form	0	1	1	1	Version 2
ADNOC Pump Form	1	1	1	1	Version 2
AHU 20	0	0	0	0	Version 0
Air Compressor	0	3	1	2	Version 6
AlphaPumpForm	1	1	0	1	Version 1
April 1 Form	1	0	0	1	Version 1
Bearing Failure Inspection	0	0	0	0	Version 0

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

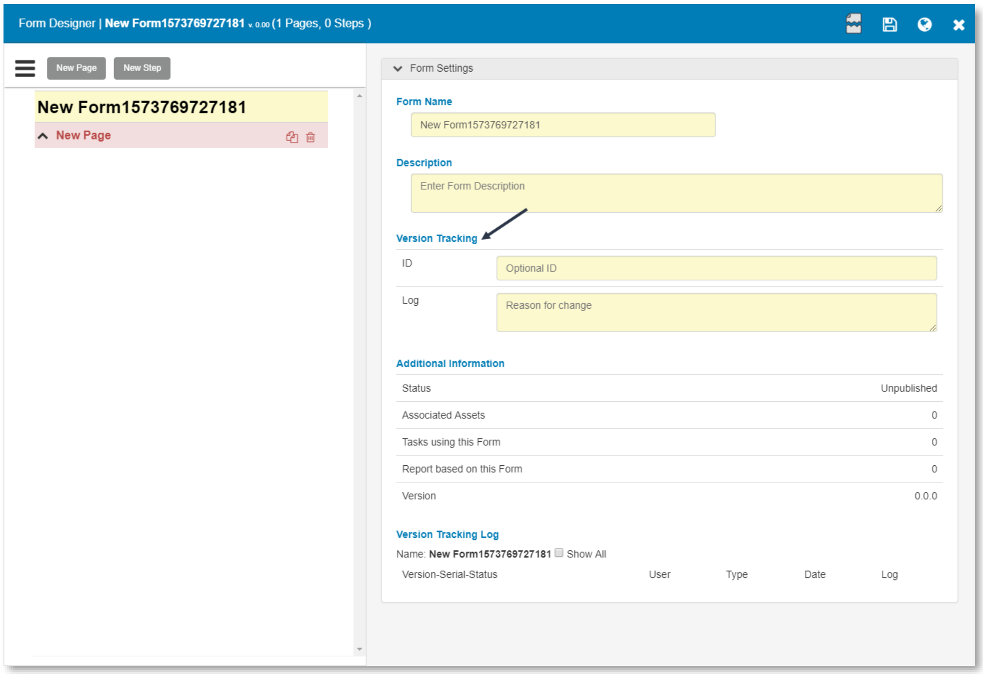
Note: The form name will be highlighed on the left and the form settings will be displayed on the right.

- 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.**



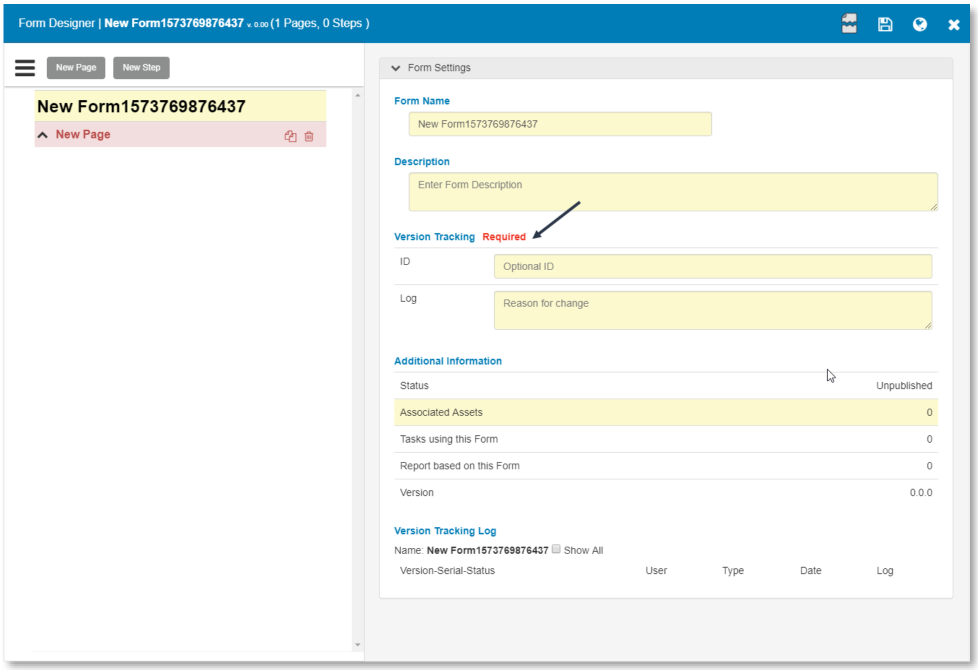
Note: The label on the left will update with the text entered in the **Form name** text field.

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:

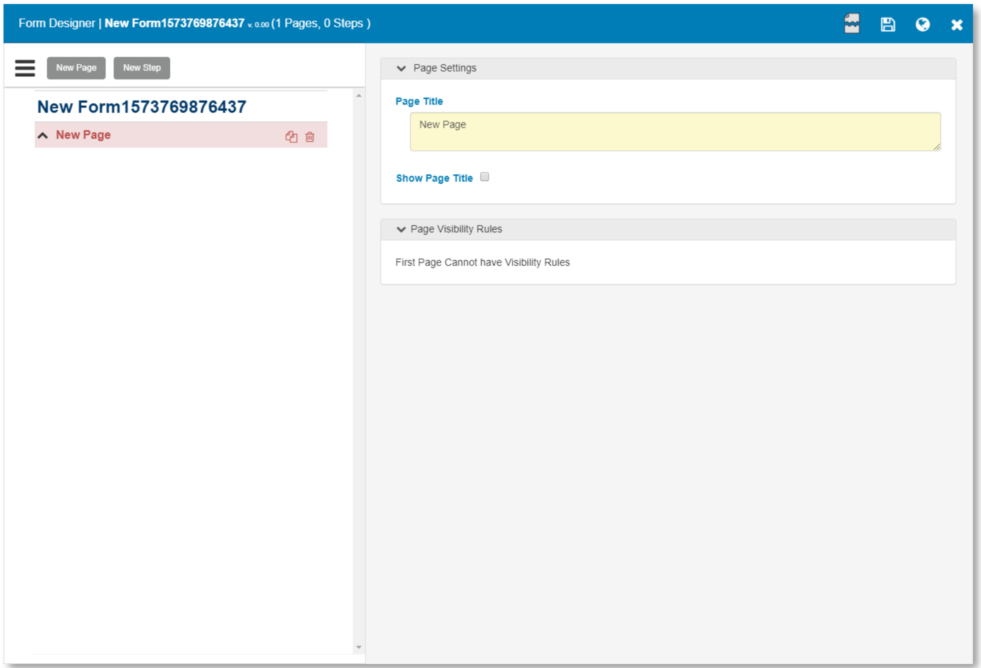


The Version Tracking Log section displays information about the Form and updates throughout the life of the Form in GoPlant. The default view shows the last version change along with the Log. The “Show All” button will display all version notes for this Form.

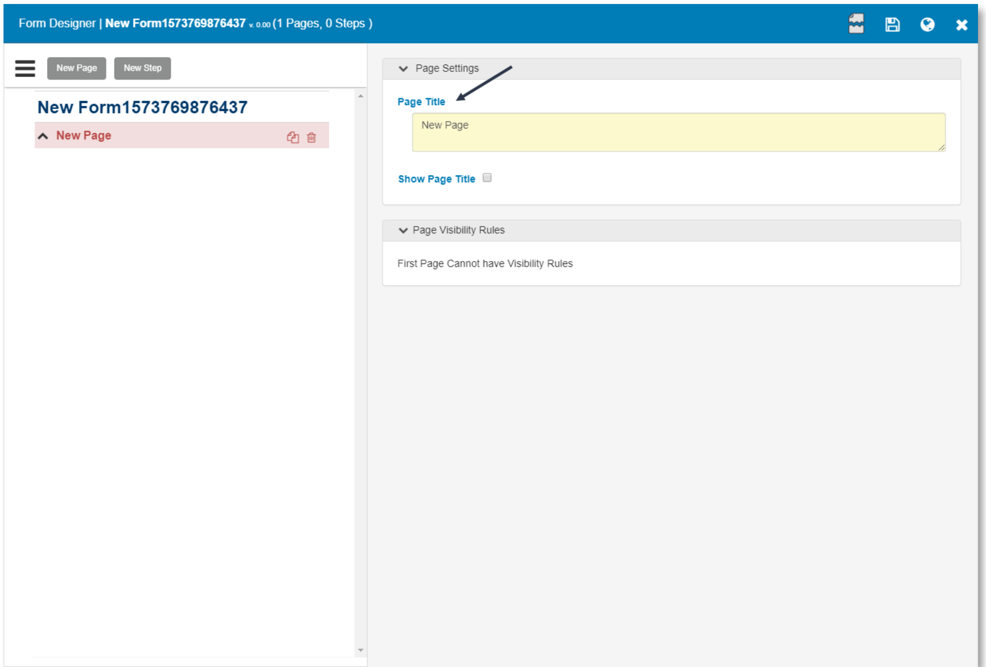
When Version Tracking for Forms is enabled and required at the Storage Group level the Version tracking items will appear in the Form Settings Window as shown below. Note that if they are required the extra red “Required” label is displayed:



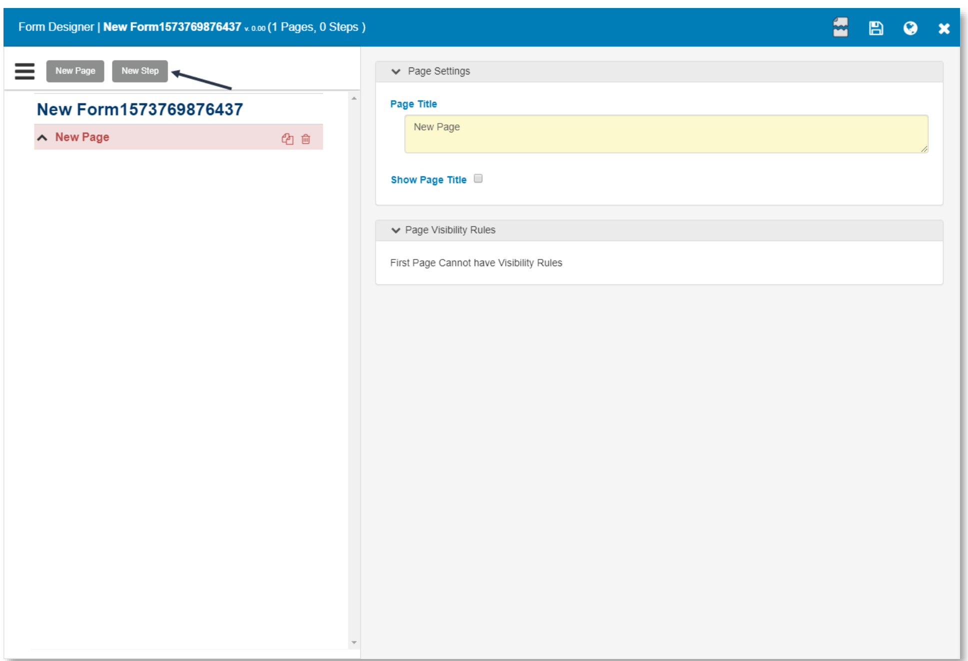
- Enter the form description in **Description**.
- Select the ^ **New Page** text under the new form name**.**   *Note: Do not select the New Page button.*



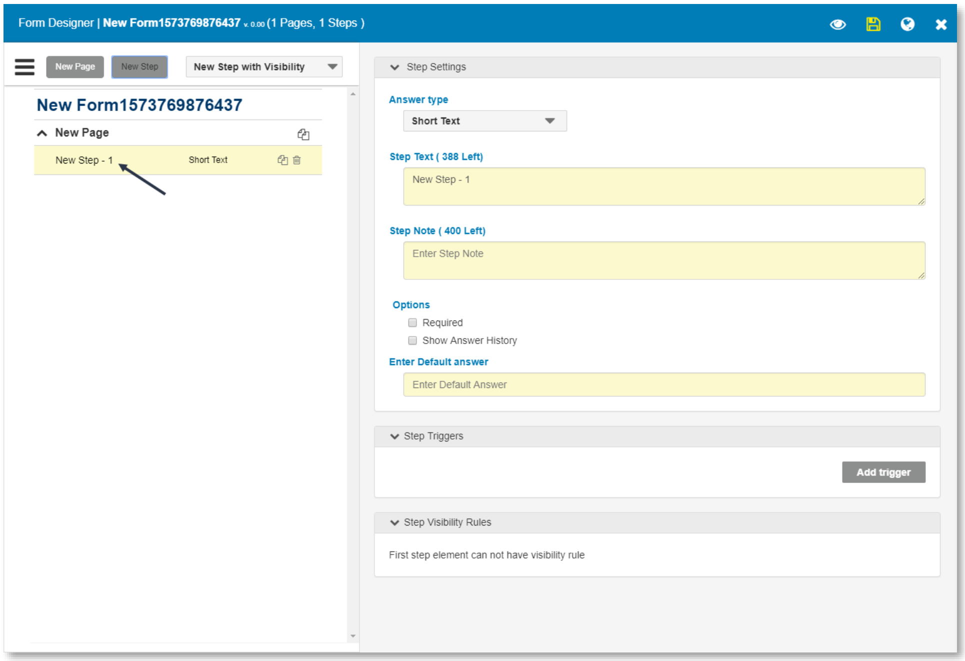
- The page settings appear on the right.



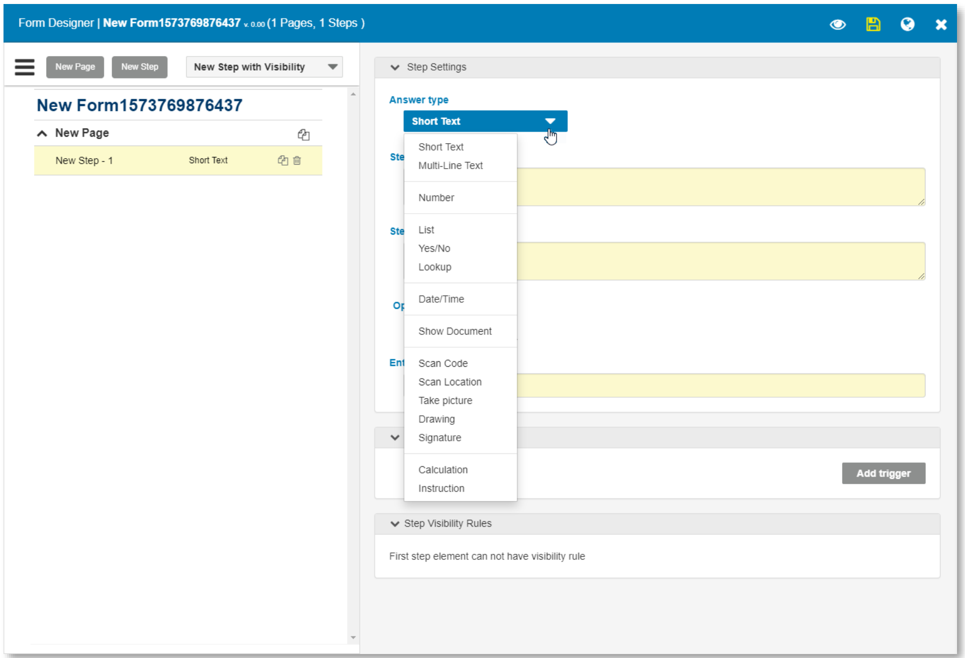
- Enter the title of the page in **Page title**.
- Select the option to show the page title, if desired.
- Create a new step by selecting New step. The step is displayed on the left and the step settings are displayed on the right.



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.



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

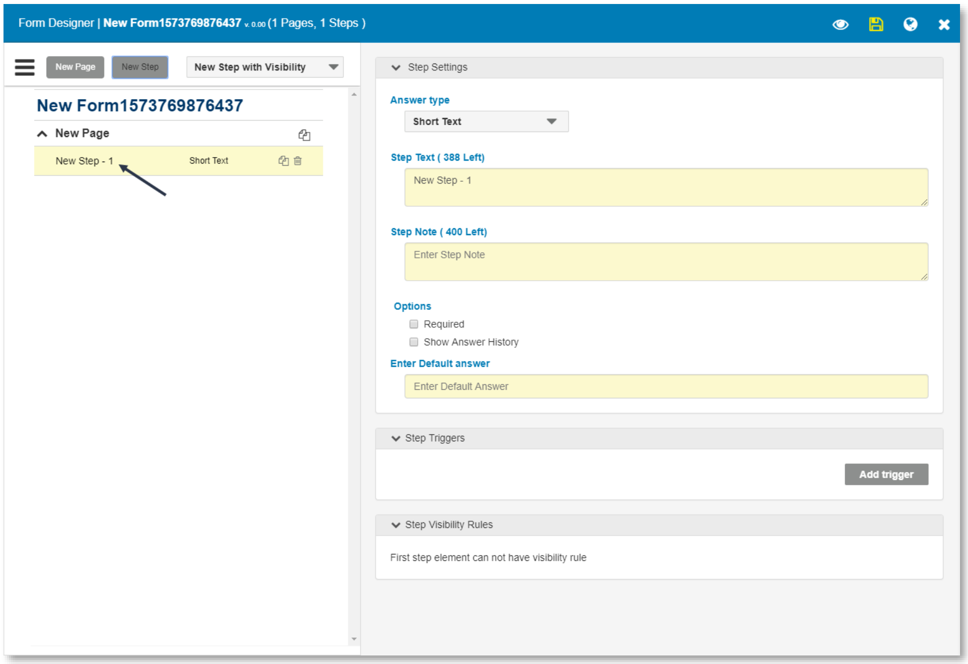


- Select the type of step to create by selecting an answer type from the dropdown (each new step will have a default answer type that can be changed in the settings)

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 with a previous answer using visibility rules and set the criteria for when the message will be displayed.
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).*
l. **Scan Location:** Use this option to verify that an operator is at a certain location or has scanned a specific tag. This requires the operator to scan a barcode/QRcode or NFC/RFID tag 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.



- 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.

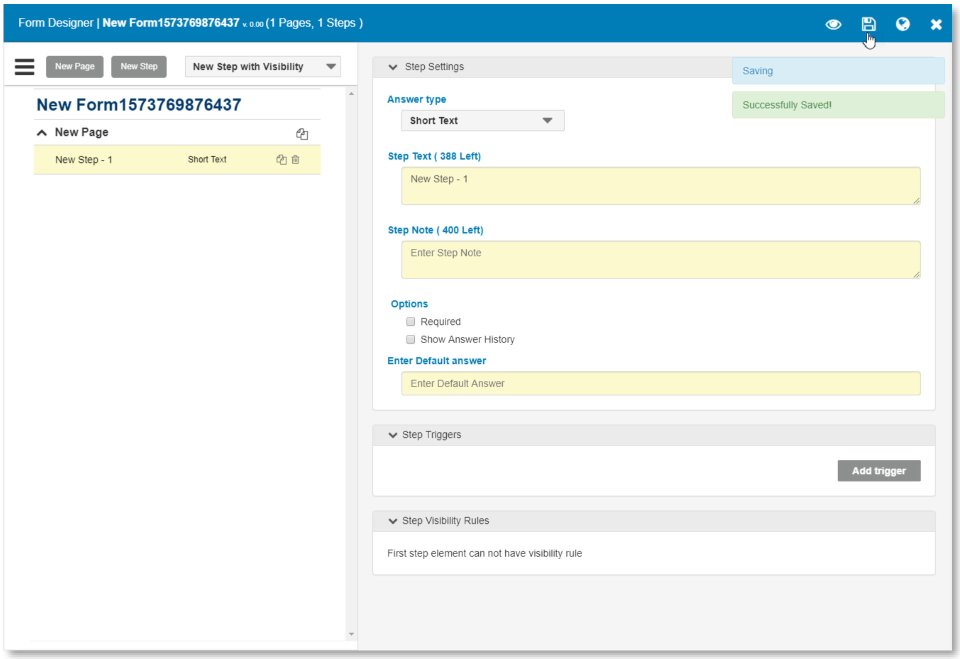
c. **Options**: As an Admin or Editor, this allows you to select a step question as Required, Show answer History, or both.

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.

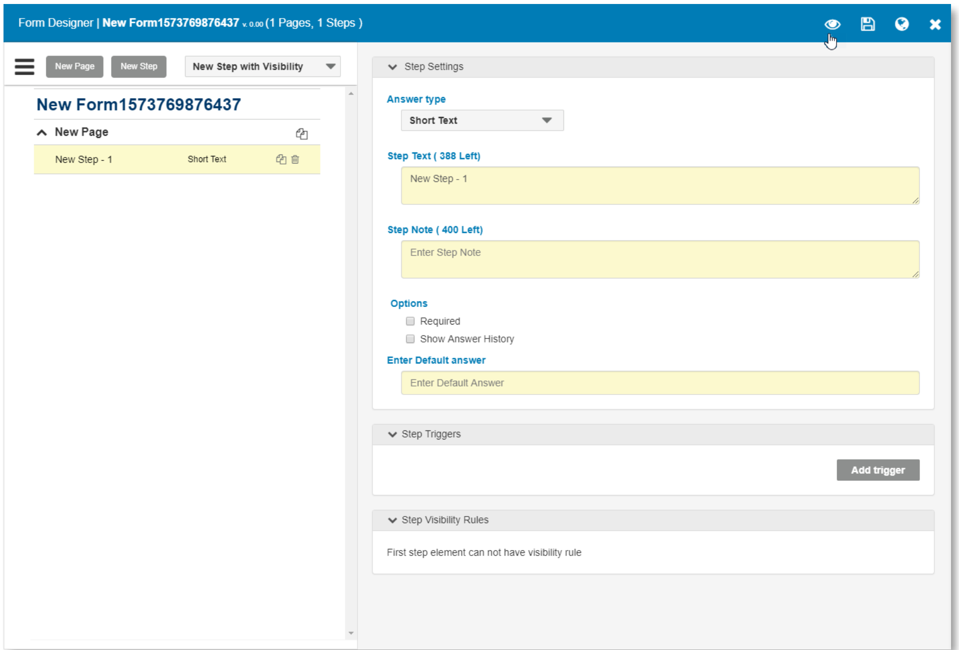
e. **Step Triggers**: Triggers are used to send emails, change the state of an asset, or set Alarm conditions for reporting and alerting. A user can define triggers that define the conditional formatting rules on the data during reporting analysis. This will create the exceptions that are generated in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

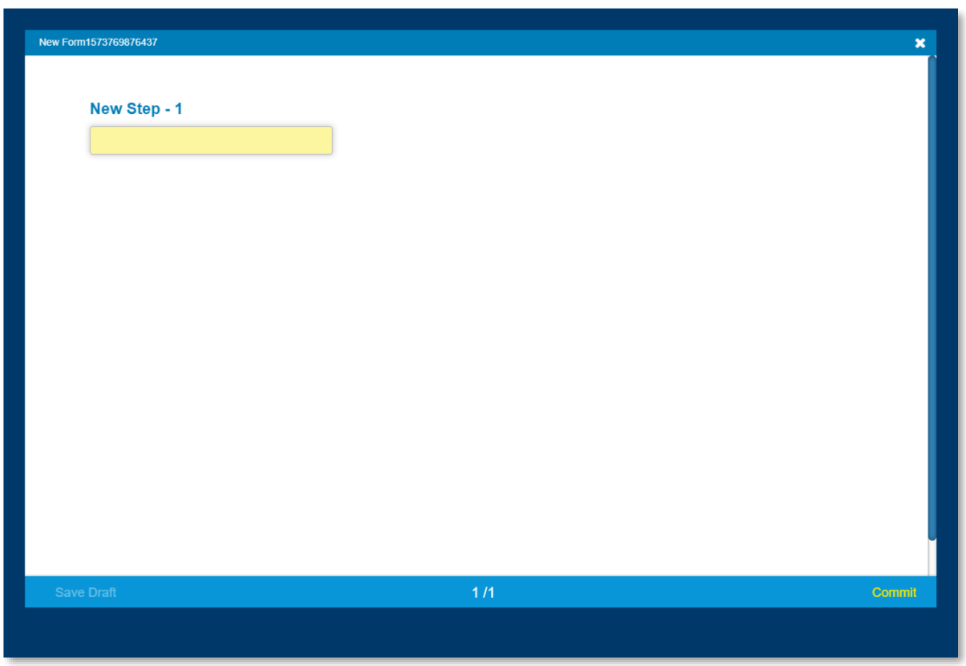
f. **Step Visibility Rules**: Visibility rules control whether step or page is displayed based on responses to previous steps.
Note: Visibility rules cannot be created for the first step (first step will always be visible).

g. **Step Visibility Timeframe:** Visibility timeframes control whether the step or page is displayed based on the time or day the round or task is started.

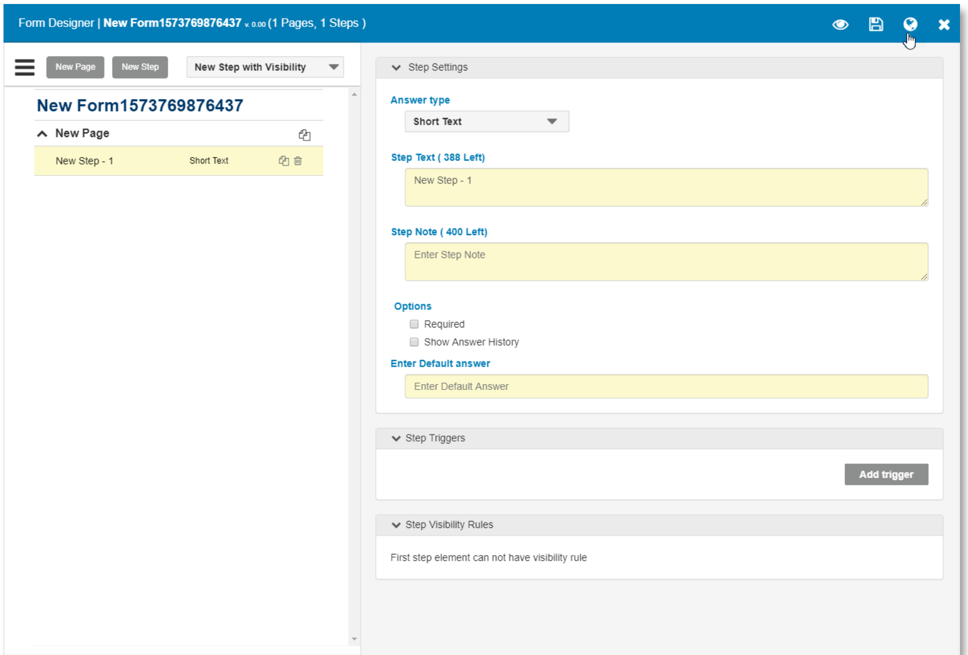


- Save the form by selecting .

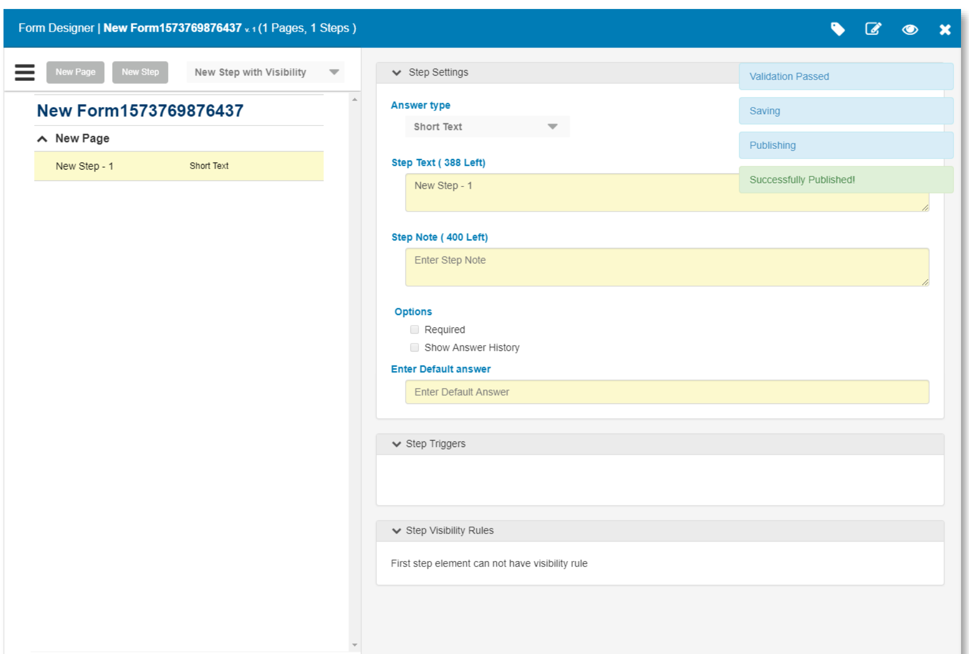




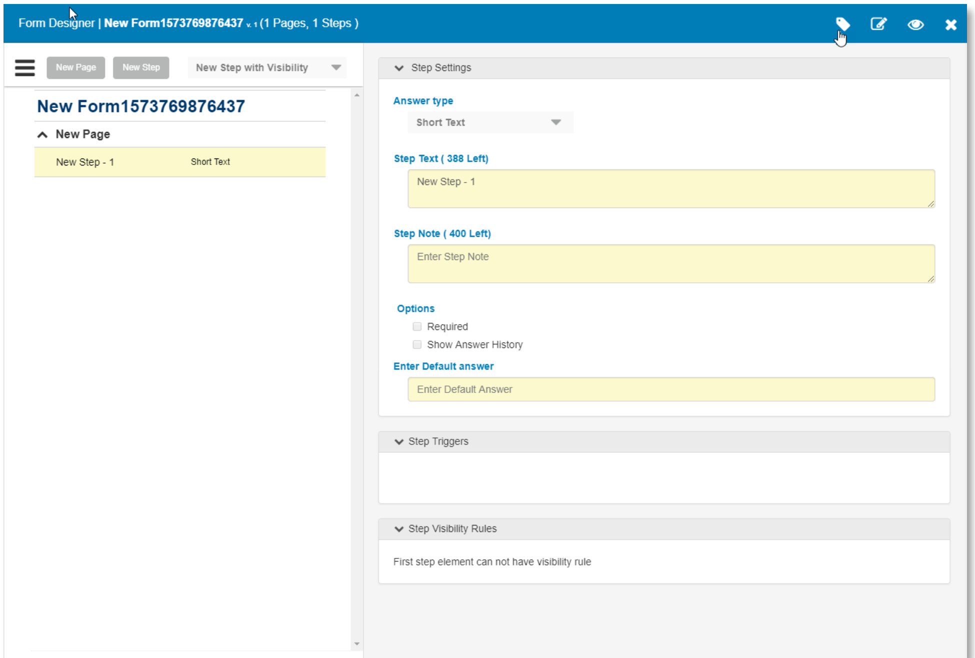
- Optional: See a preview of the form by selecting icon.



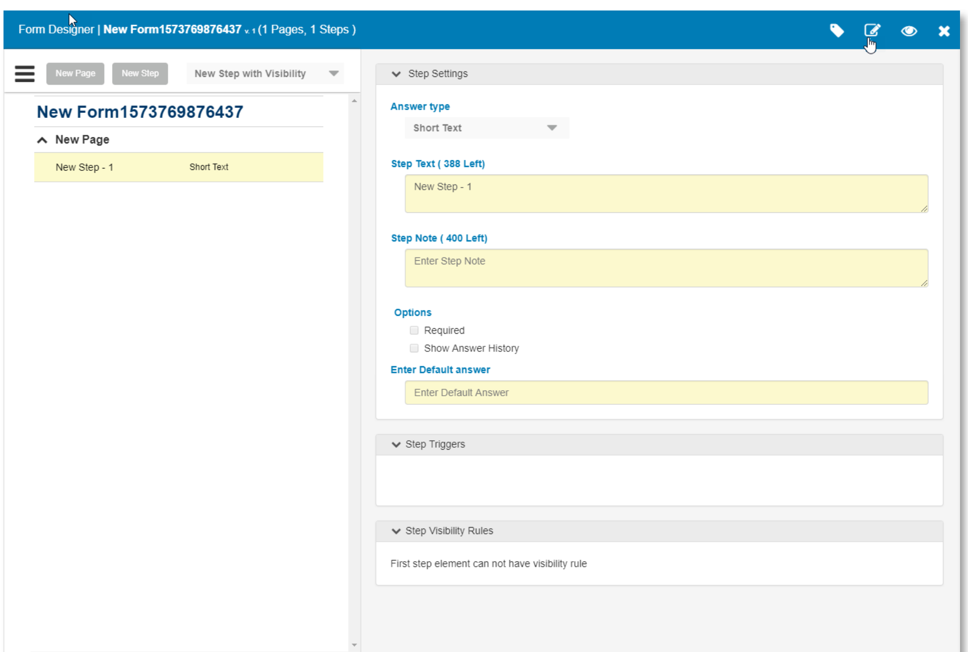
- Publish the form by selecting . When you select publish, the form is automatically saved first then published.

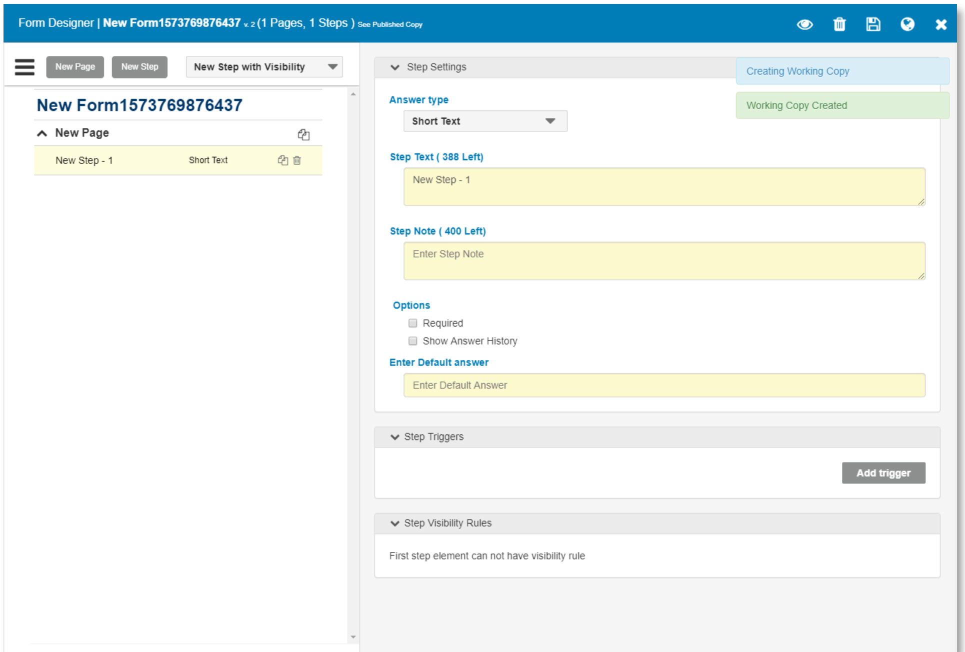


Note: Once a form is published it will be available to all users as well as available for use in associating Assets, Rounds, Tasks, and Reports/Charts.

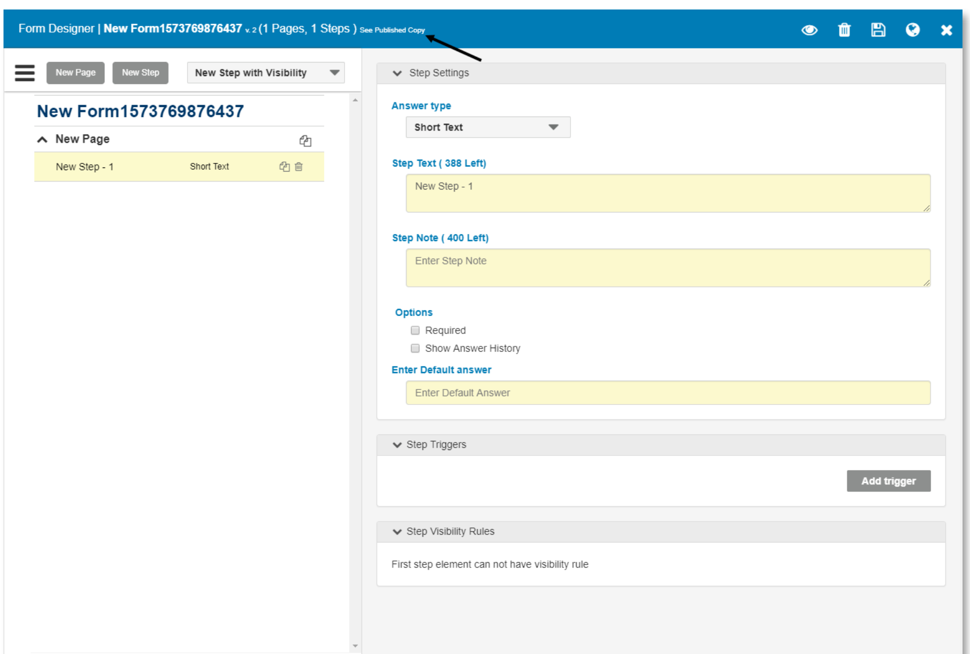


- Once the Form is published, add External Tags via the External Tag Editor by selecting . External Tags are used to assign specific Step questions on the form with external software "Tags" that alllow for reporting output, external data queries via the GoPlant API, or CSV ouptut reports. External Tags 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.

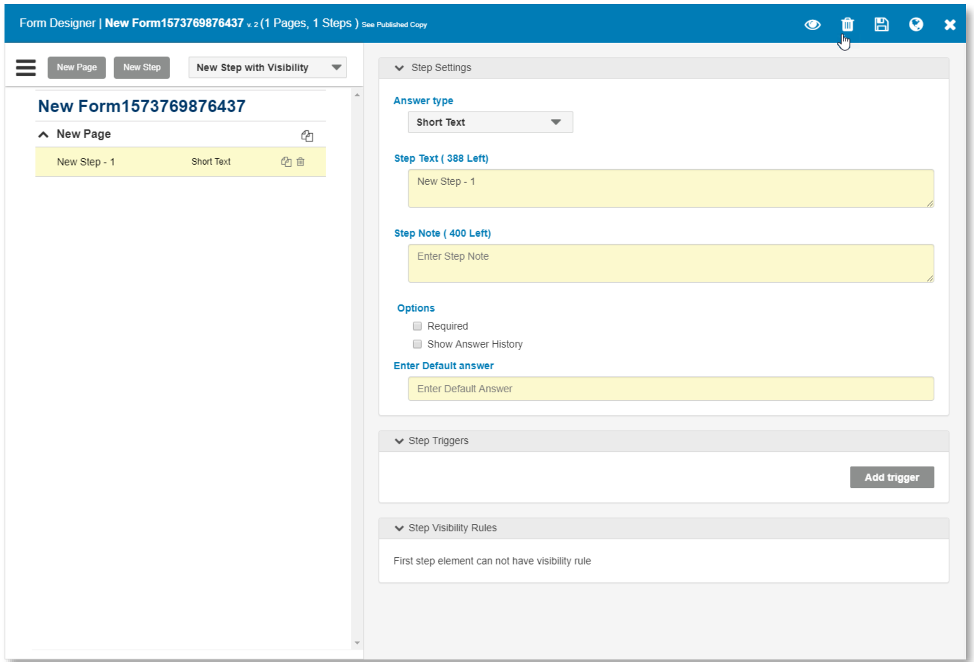




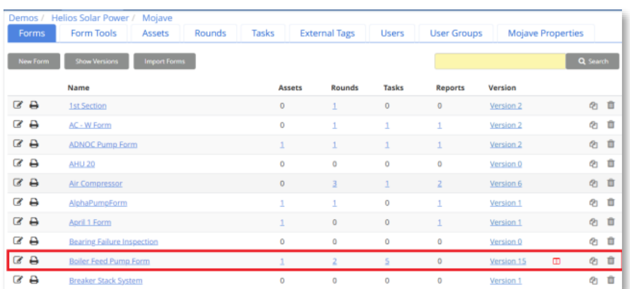
- To edit a form after it is published, you must create a “working copy” by selecting  , select the save icon when ready to save, and the publish icon to publish again. Only working copies of Forms may be edited. Working Copies enable users to modify Forms without disrupting the published copies on mobile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



- 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.



- 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.



- 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 in the form list.

- **Working with Triggers in the Form Designer**

  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:

  1. **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.

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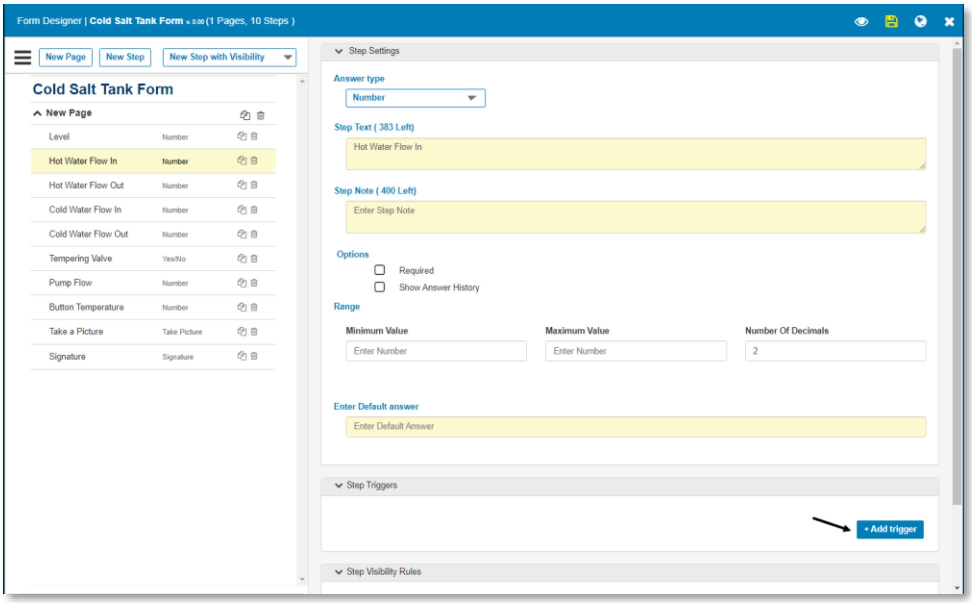
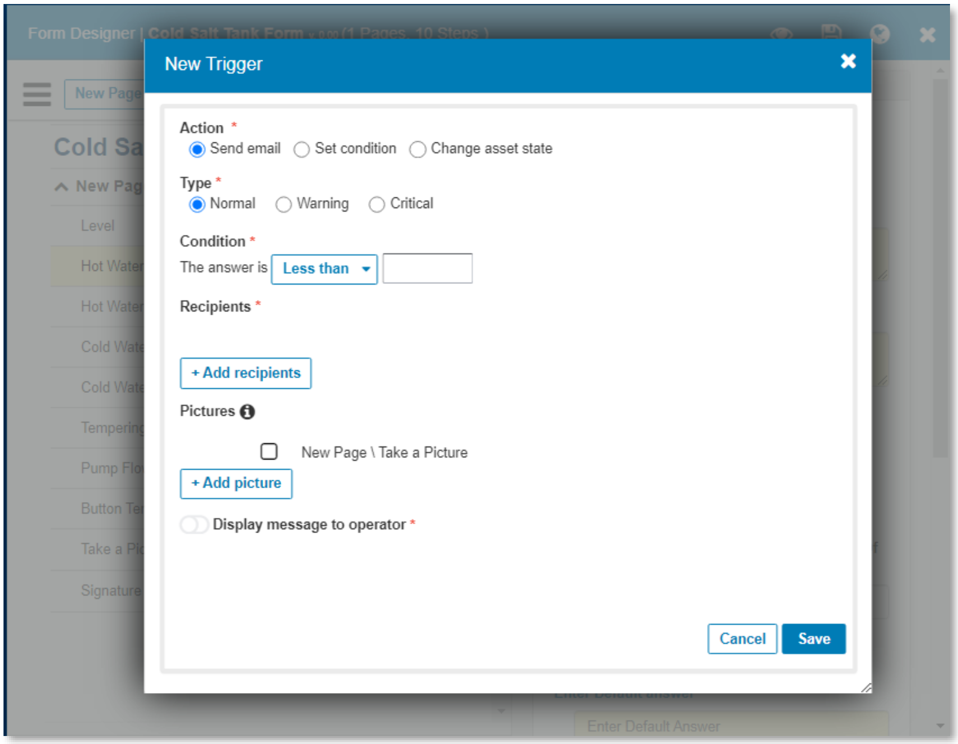
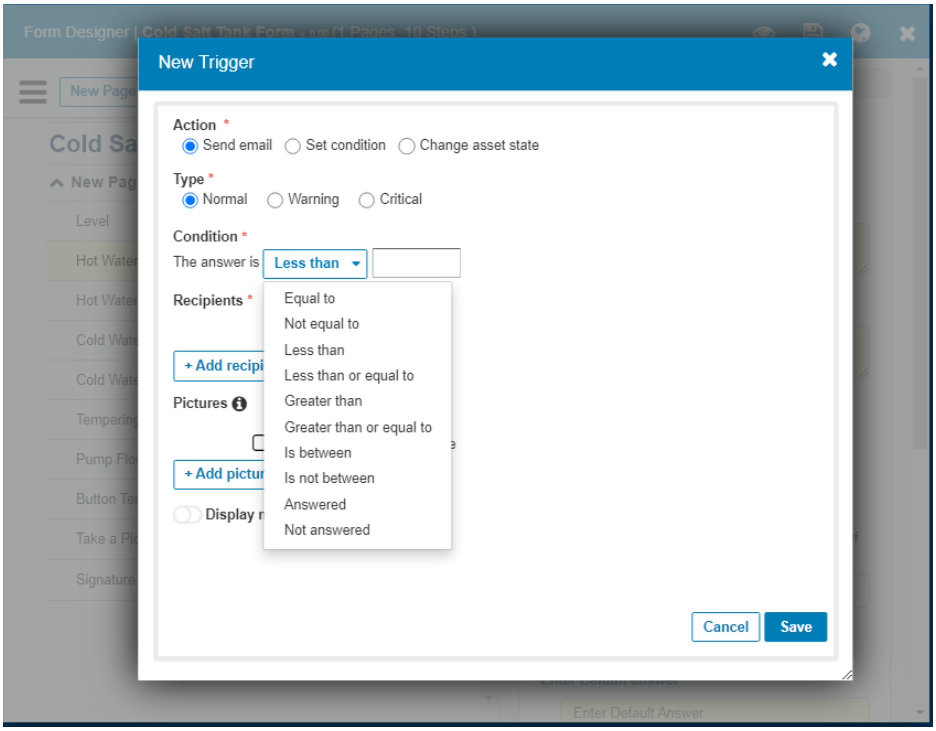


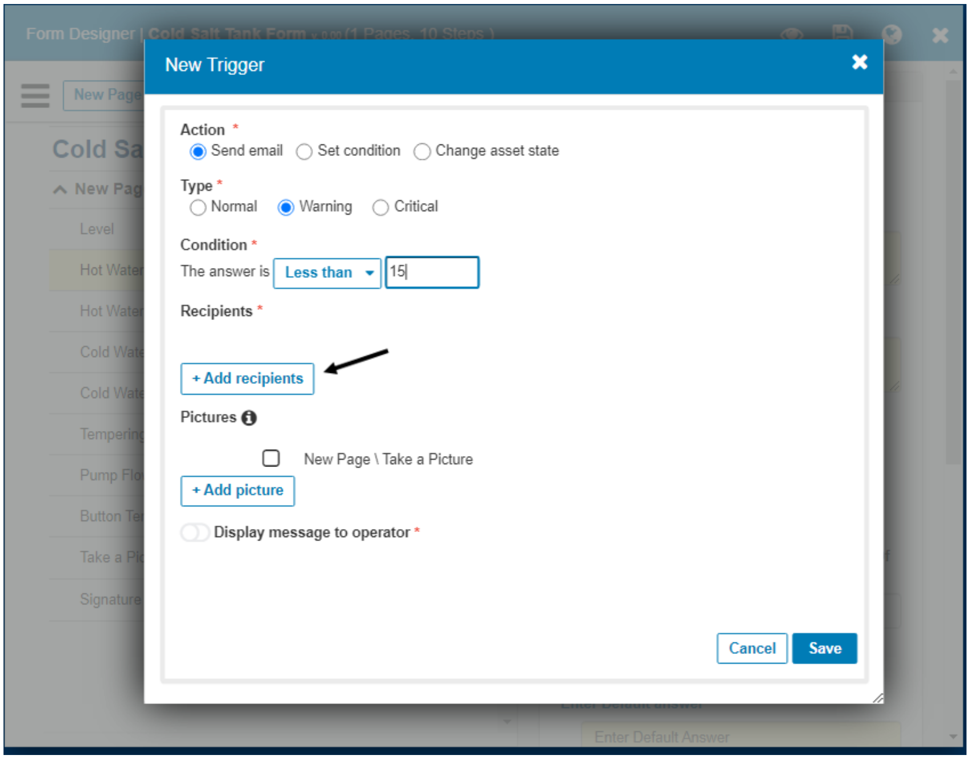
- Select **"Add Trigger"** in the Step Triggers section within a step setting.



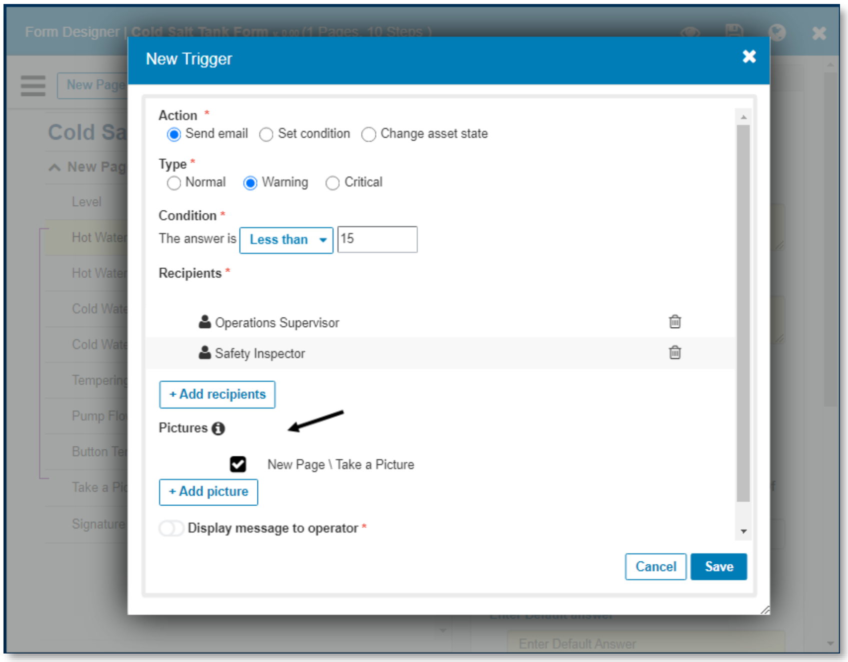
- To send an email, select the **"Send email" Action** and then select the **Type** of email to send.



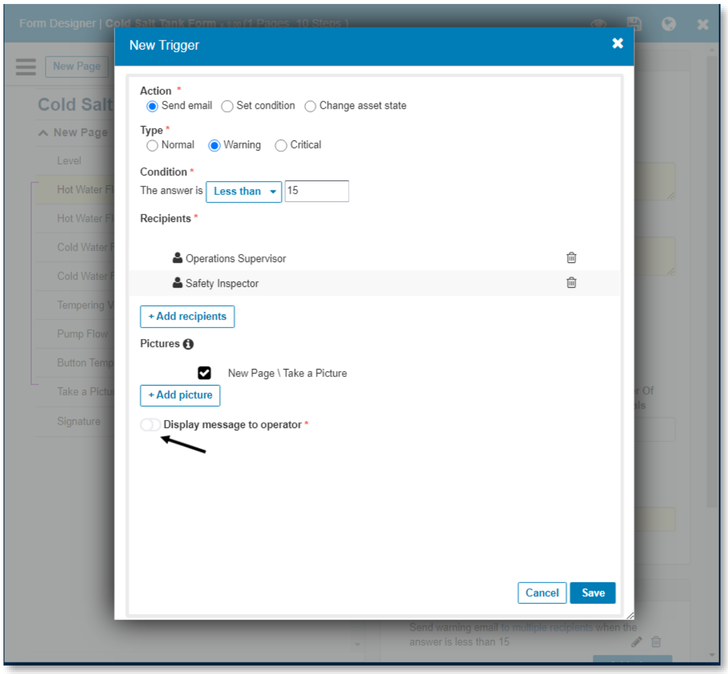
- Chose the **"Condition"** when the email will be sent from the drop-down list and then enter any required value.



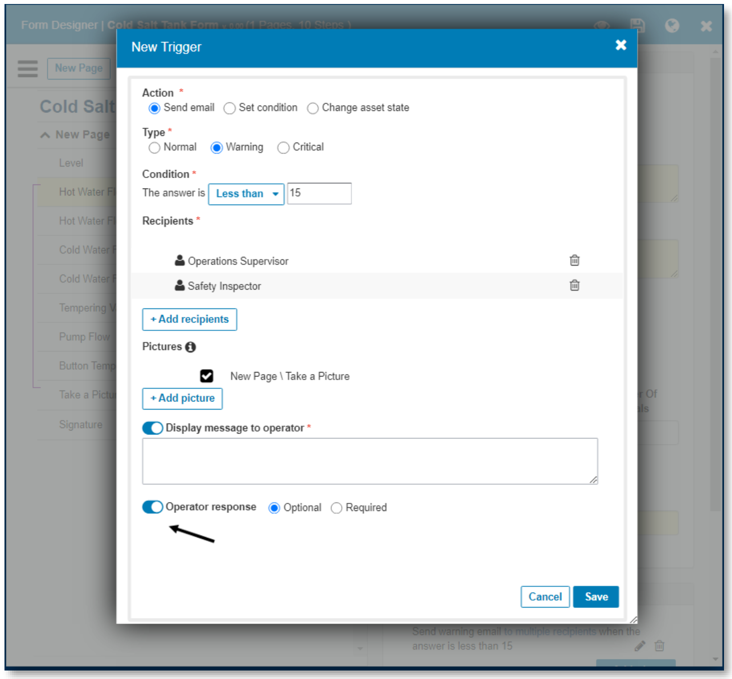
- Use the **"Add recipients"** button to select who will receive the email.



- 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.



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



- 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.

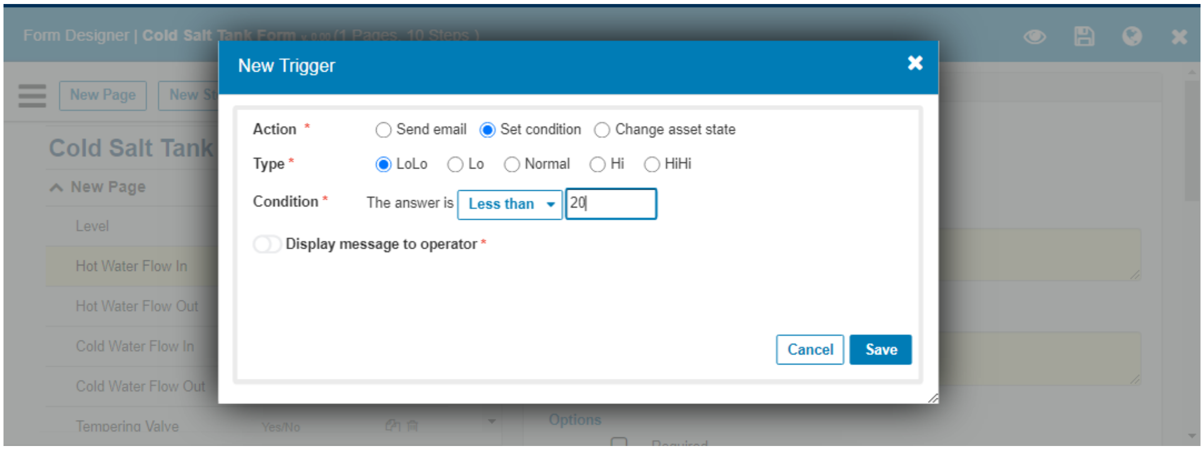
Note: Conditional Formatting colors are globally defined in the Admin Report Settings.

1. Numeric Conditions (Exceptions)

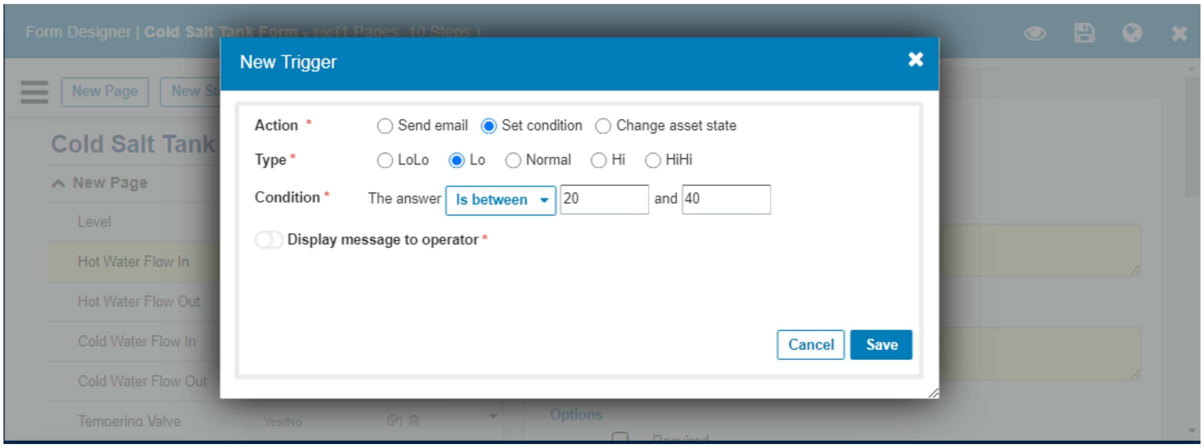
   Number and Calculation step types support "Numeric Conditions" which are used to trigger specific exceptions for certain ranges of values.

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

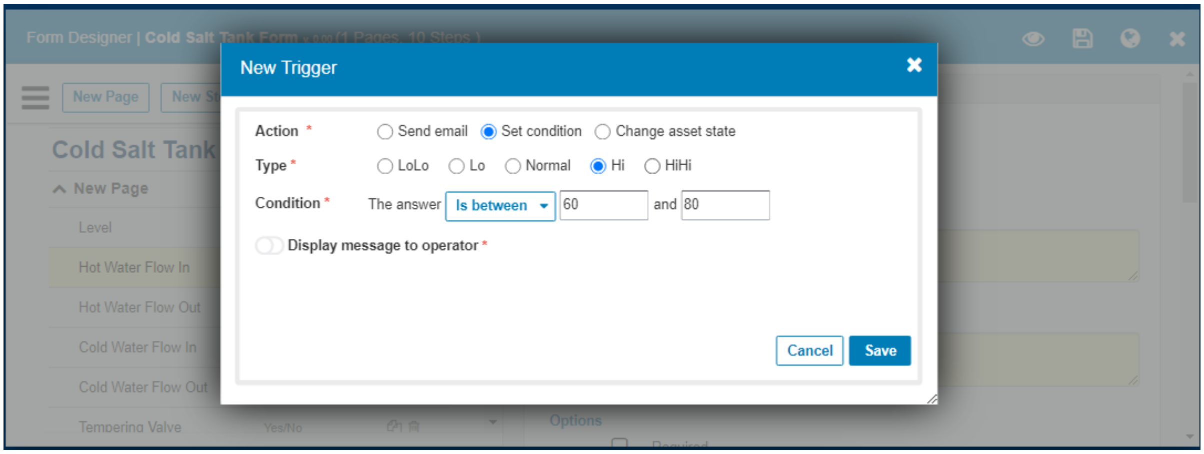
- When the answer is “**Less than**” 20, trigger a **LoLo Condition**.



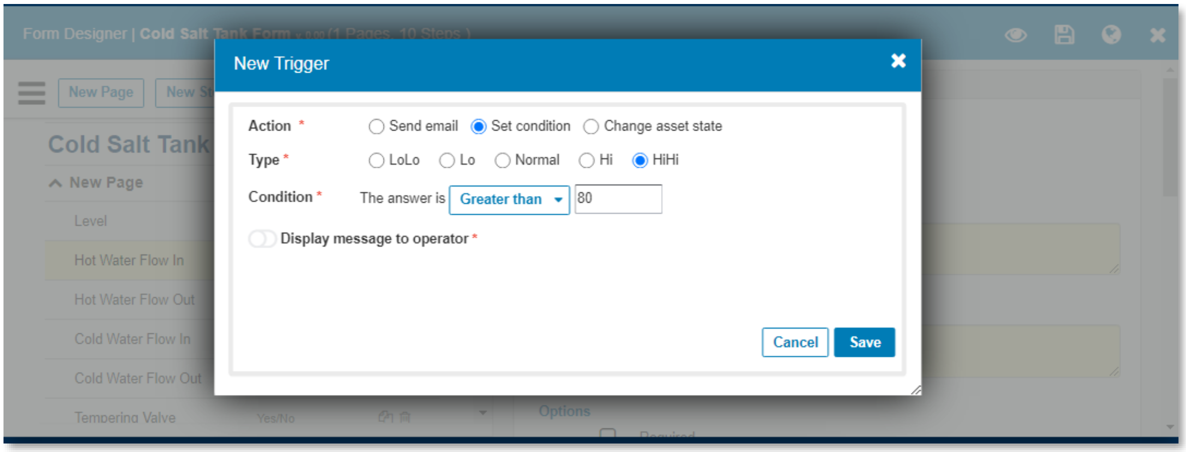
- When the answer “**Is Between**” 20 and 40, trigger a **Lo Condition**.



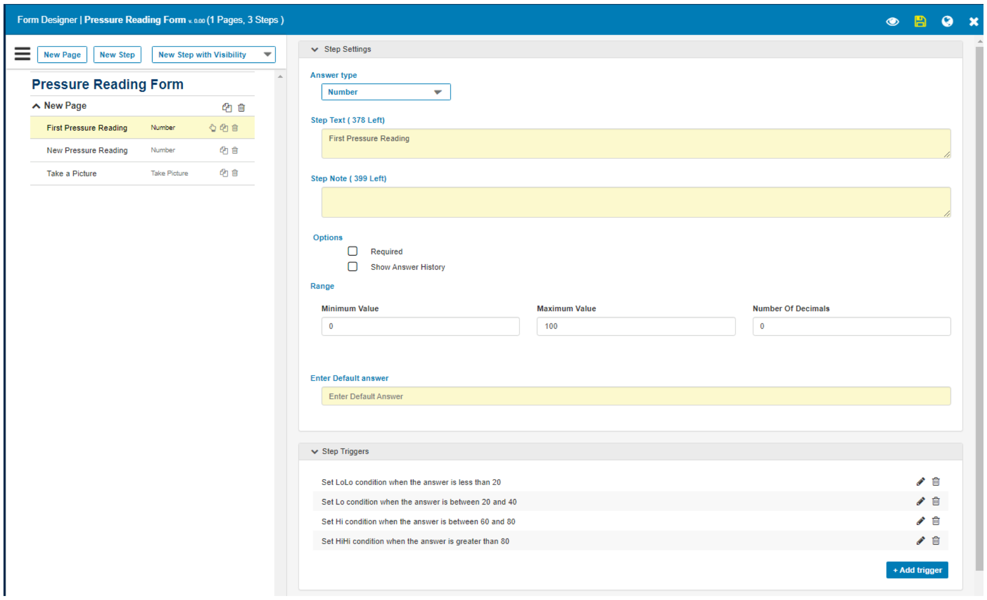
- When the answer “**Is Between**” 60 and 80, trigger a **Hi Condition**.



- When the answer is “**Greater than**” 80, trigger a **HiHi Condition**.

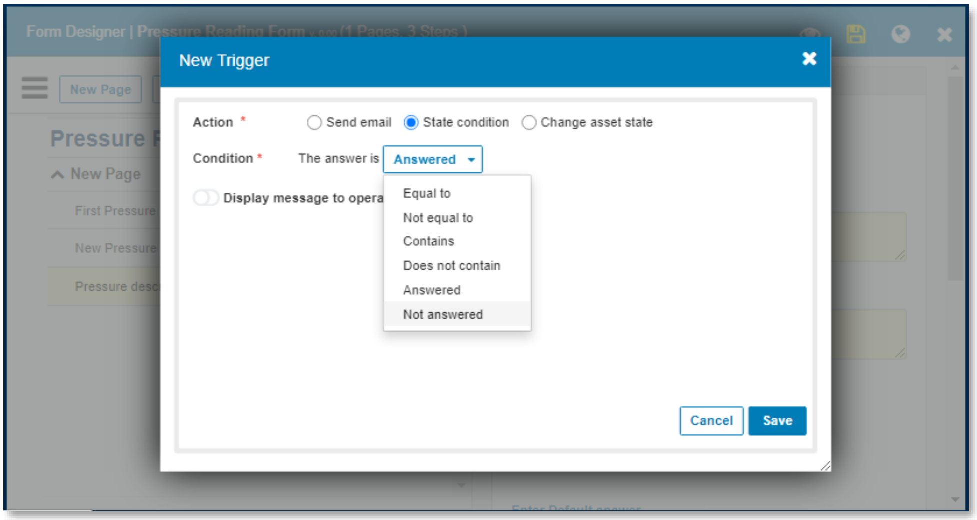


- When the four triggers are configured, they will be shown as follows in GoPlant



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.

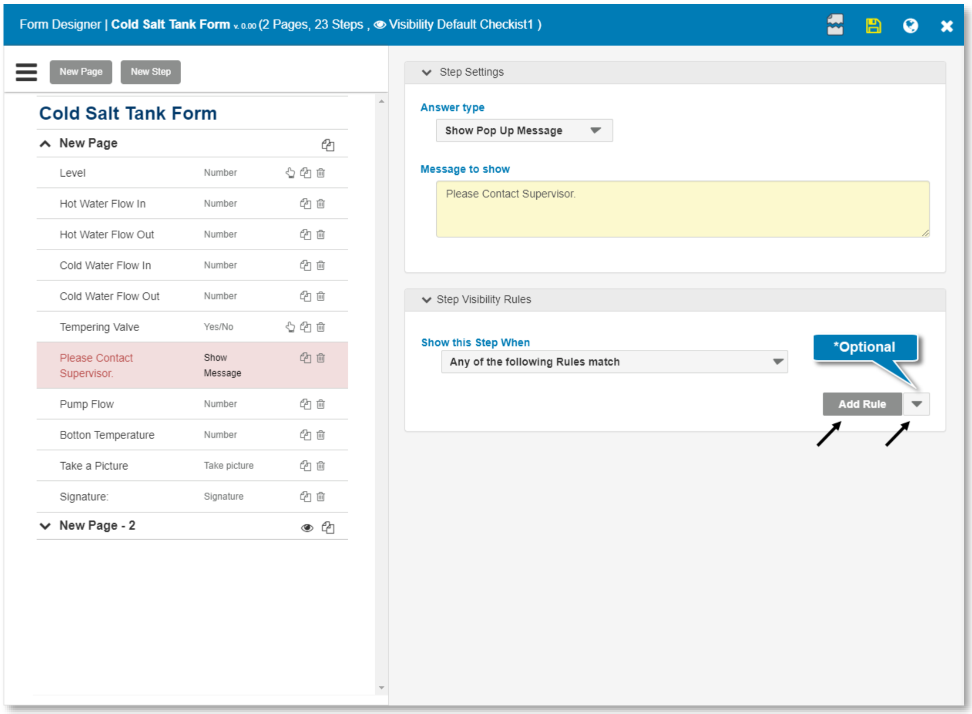


- Select the “**State Condition**” Action and then choose the Condition from the drop-down.

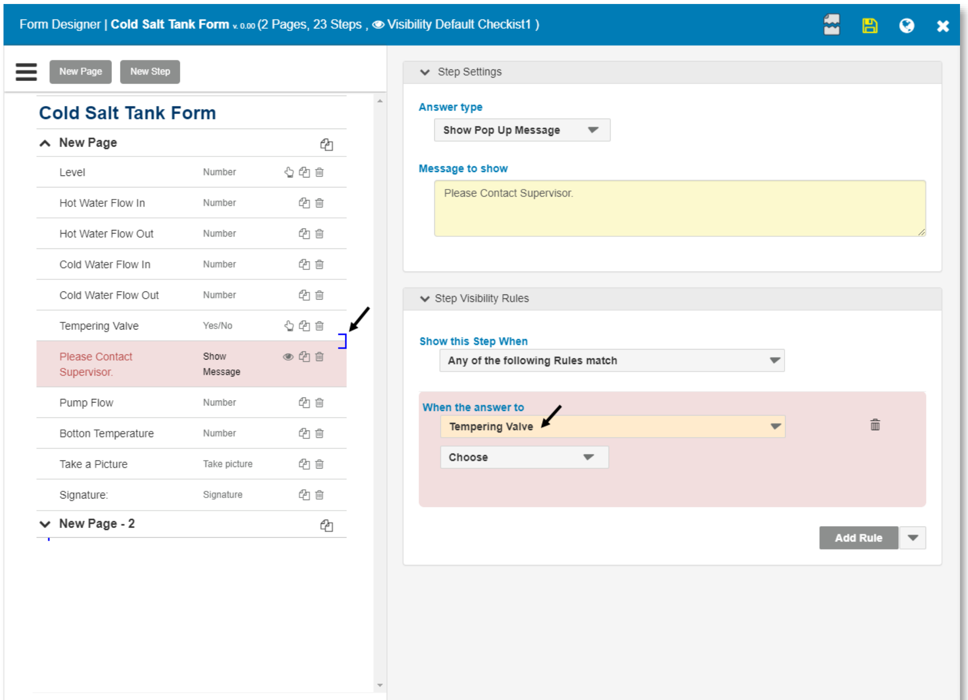
- **Working with Visibility Rules in the Form Designer**

The Form Designer allows adding visibility rules to a step or page within a form, enabling additional flexibility and actions based on a previous step answer. Visibility rules can only point to steps before the current step. The first step question and first page cannot contain a visibility rule (as there are no preceding steps or pages).

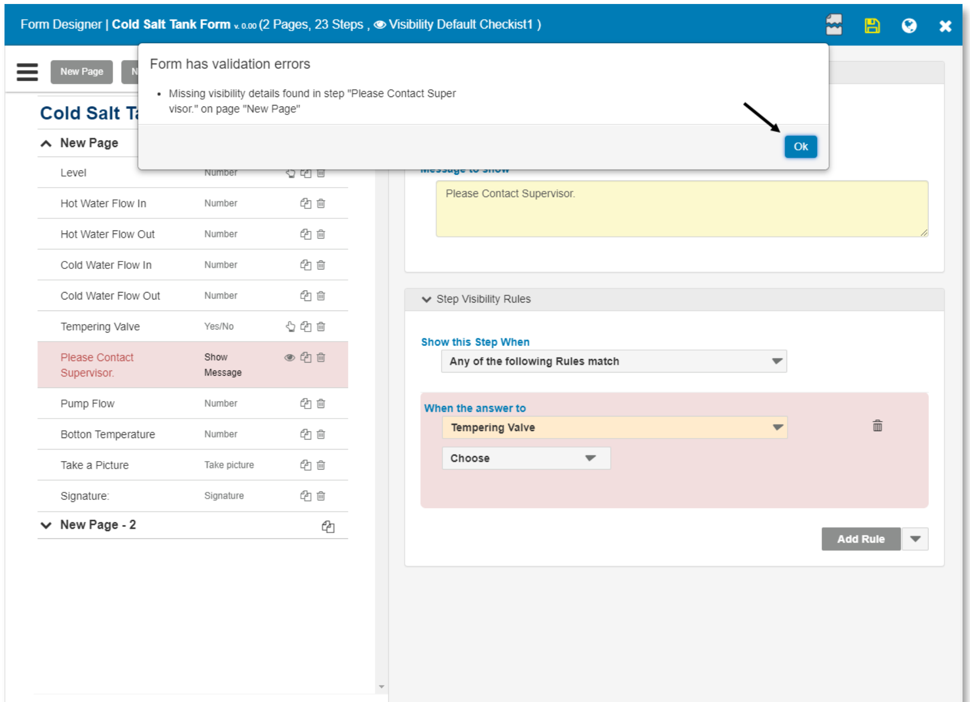
Note: Visibility Rules can be defined within both Steps and Pages.



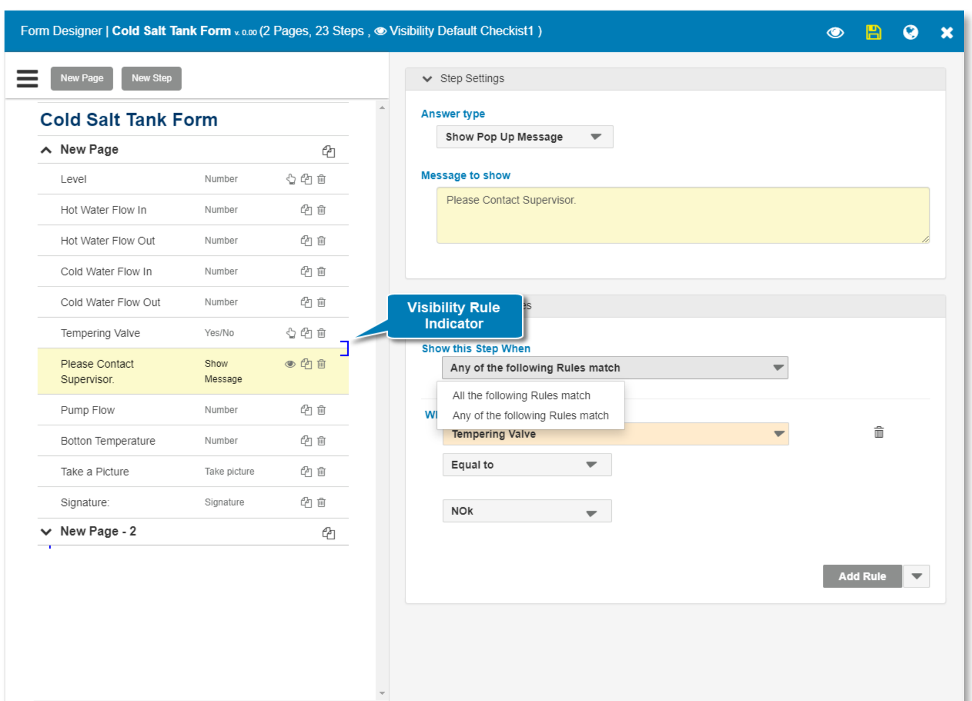
- Select "Add Rule" Add Rule or "Add Default Visibility Rule" Yes/No/Answered Add Rule if there is a default visibility rule set in Visibility Rules section in the Step/Page settings.



Note: The background will appear in red indicating that all options should be selected, the validation icon will appear. Pressing displays detailed information about the validation issue.

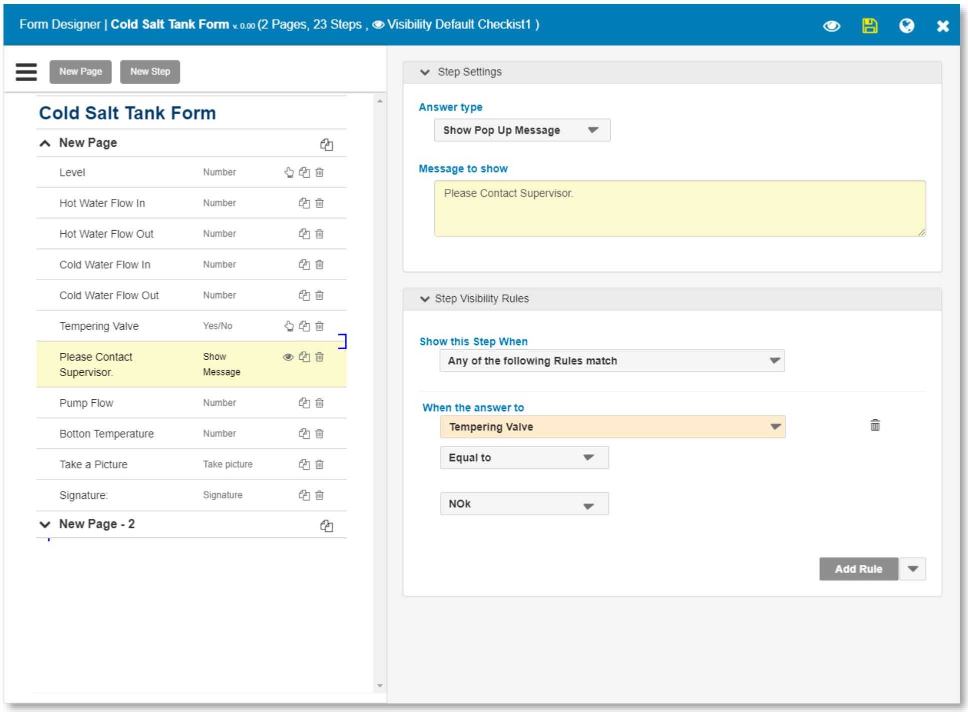


Note: When all Visibility Rules options are selected, the background will change to white and the validation icon will disappear.



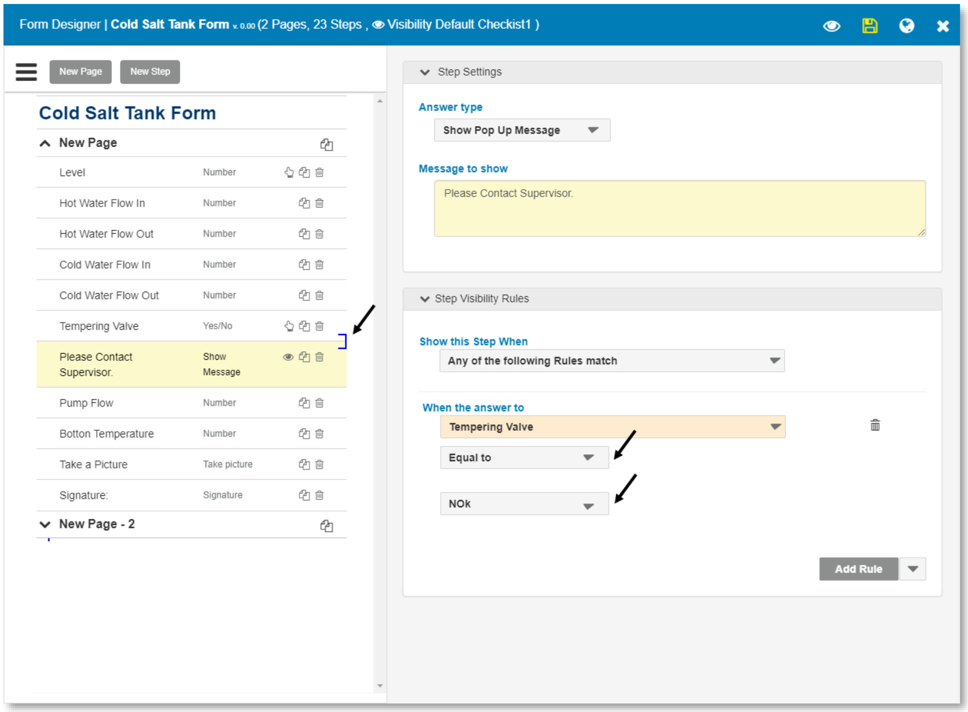
Select when the page or step is visible by selecting the expression of when the rule(s) will be used.

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.

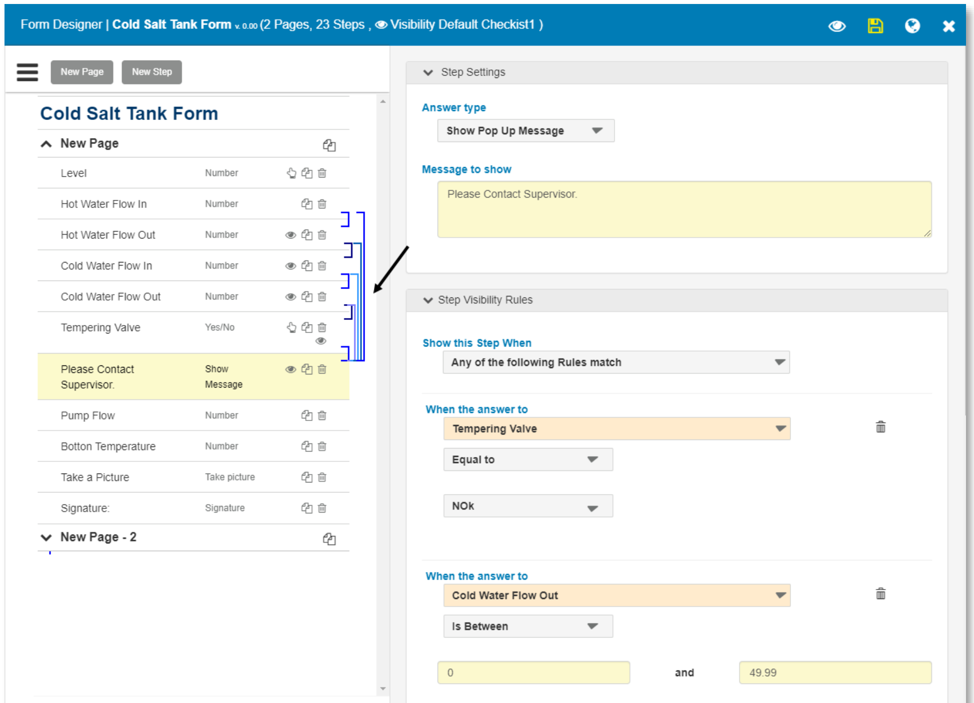


- Select the step referenced in the “When the answer to” dropdown.

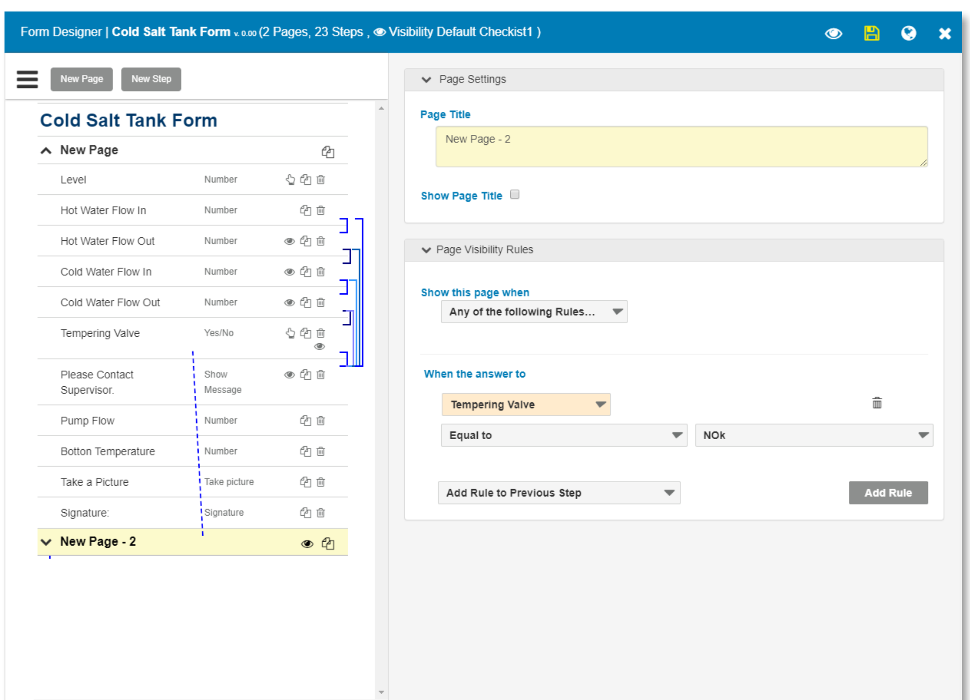
Note: This dropdown will list all steps defined above the step/page with the defined visibility rule.



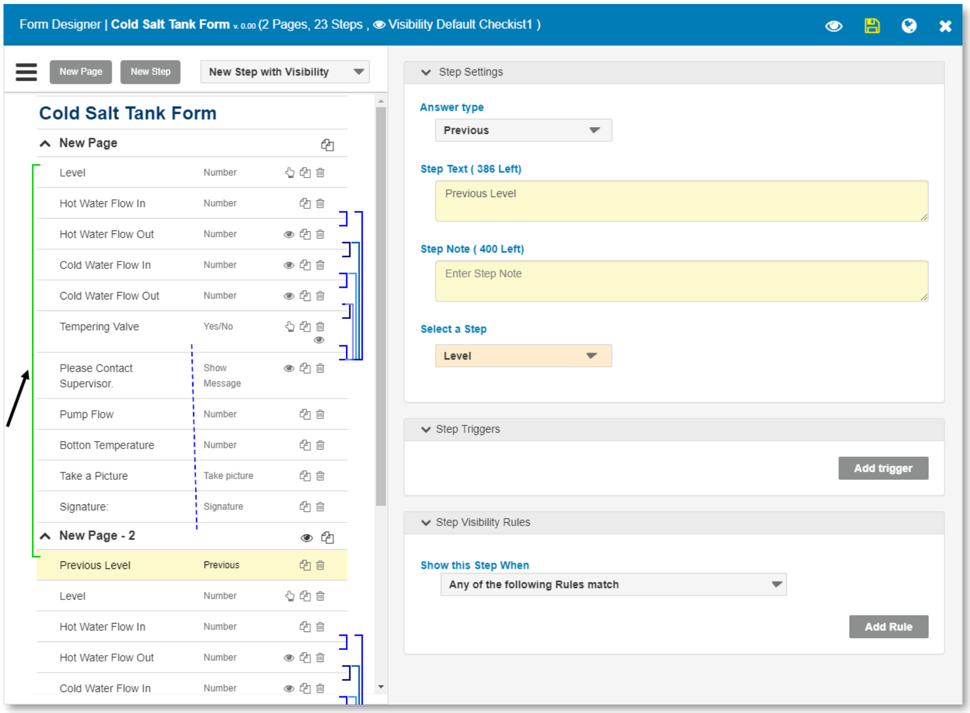
- Select the logical condition and enter the corresponding values to define when the step/page will display. Note that the criteria will update based upon the selected step type for “When the Answer to” is selected. Various options will be available based upon pointing to a numeric, list, yes/no, or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



If there is a visibility rule on a page, a line will be displayed indicating the dependency.



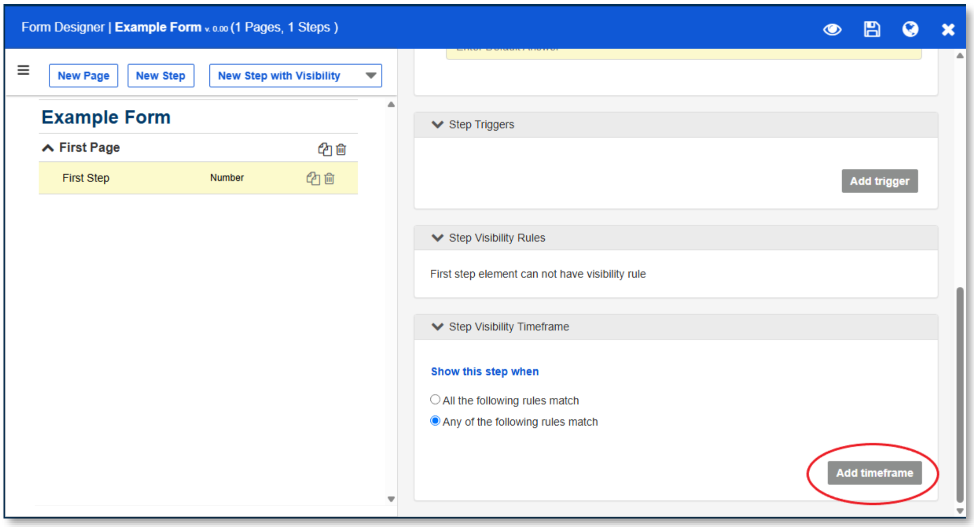
Another type of dependency line will be shown if there is a previous step, indicated by a green line on the left side.



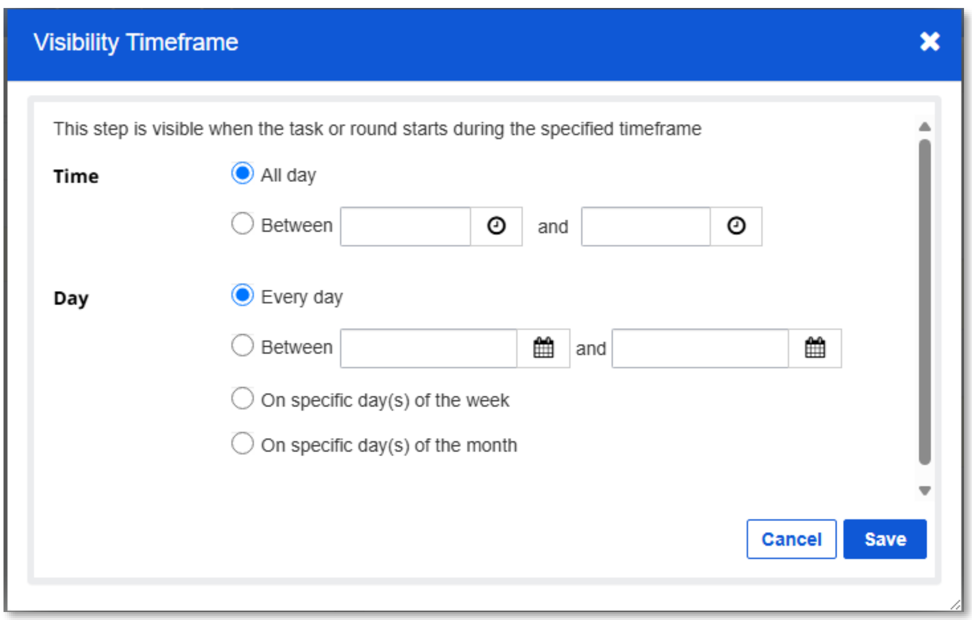
- **Working with Visibility Timeframes in the Form Designer**

The Form Designer allows adding visibility timeframes to a step or page within a form. Visibility timeframes control visibility based on date and/or time the round or task is started.

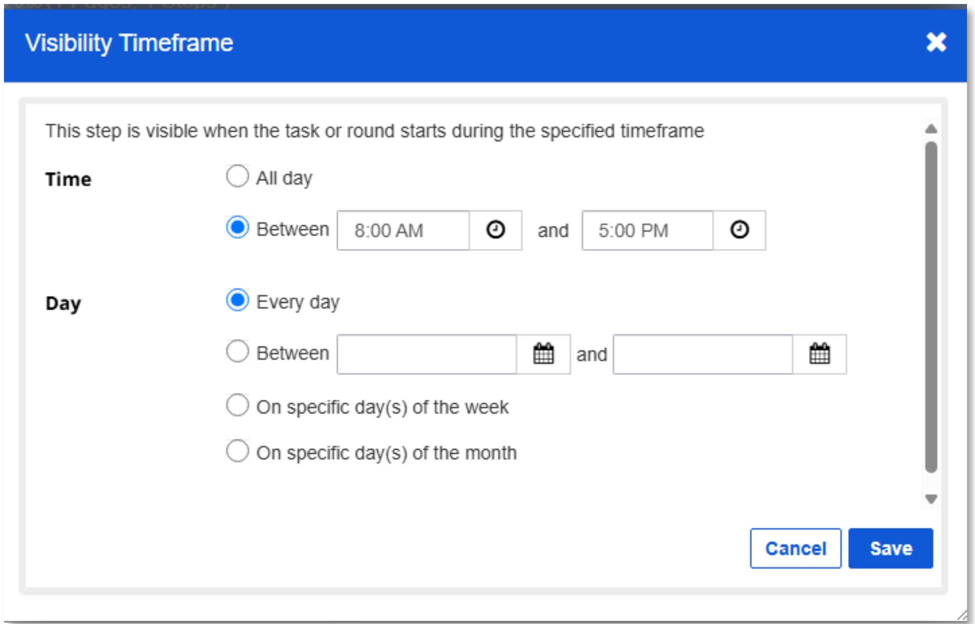
To set a visibility timeframe for a step or page, select “Add Timeframe”.



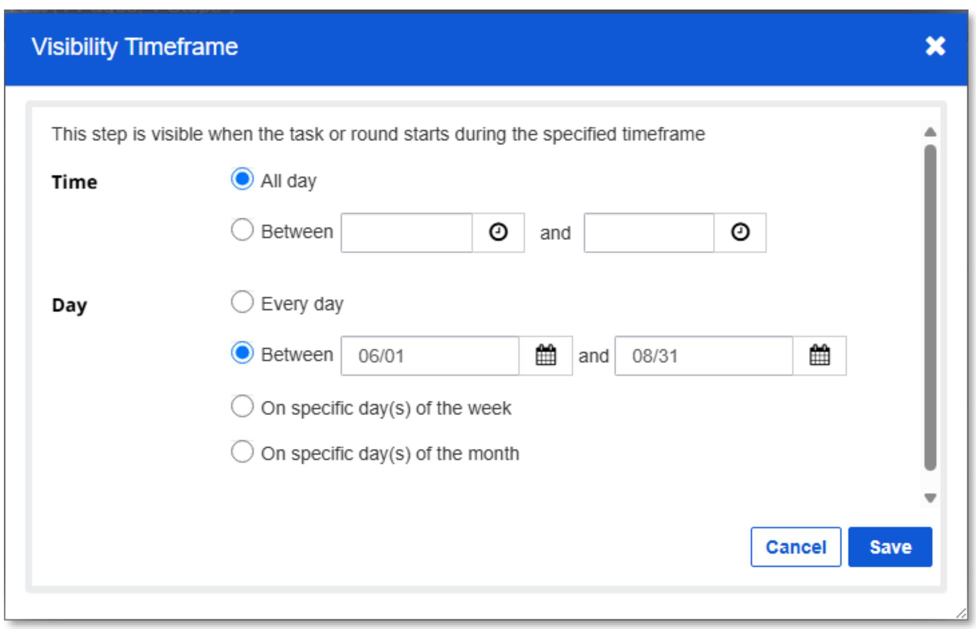
- Clicking the button opens the visibility timeframe dialog.



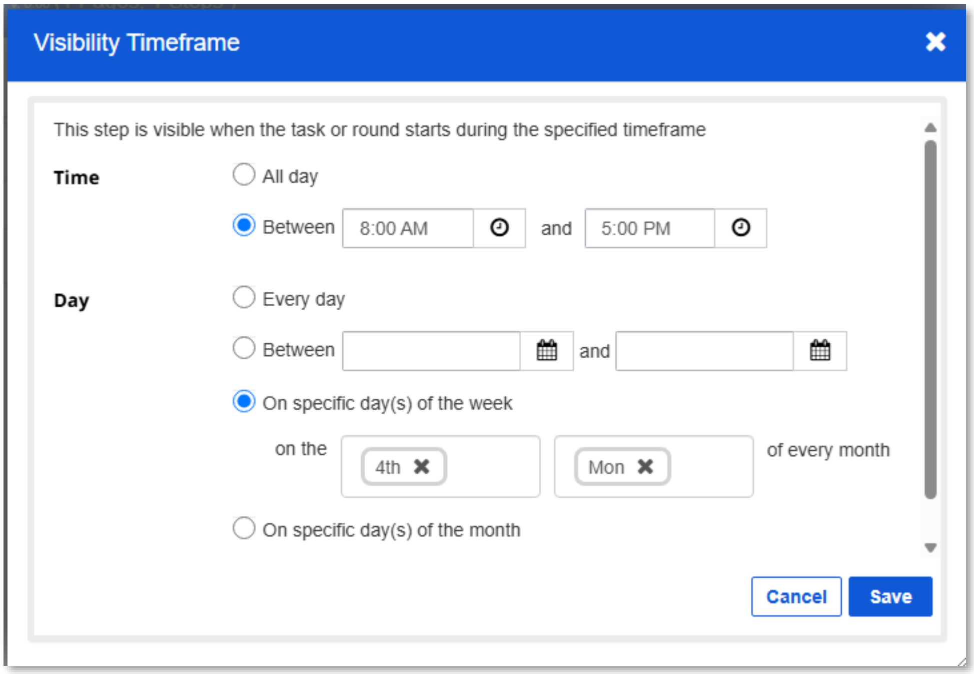
- To control the time of day that a step or page is visible, select the “Between” option and enter the start and end times for visibility. In the example below, the step will only be visible when the round or task starts between 8:00 AM and 5:00 PM.



- Note that the start time can be later than then end time. For instance, if the start time is 11:00 PM and the end time is 5:00 AM, the step is visible between 11:00 PM and 5:00 AM the following morning.
- Visibility timeframes can also be set for specific days. In the example below, the step will only be visible on rounds or tasks that start between June 1st and August 31st each year.



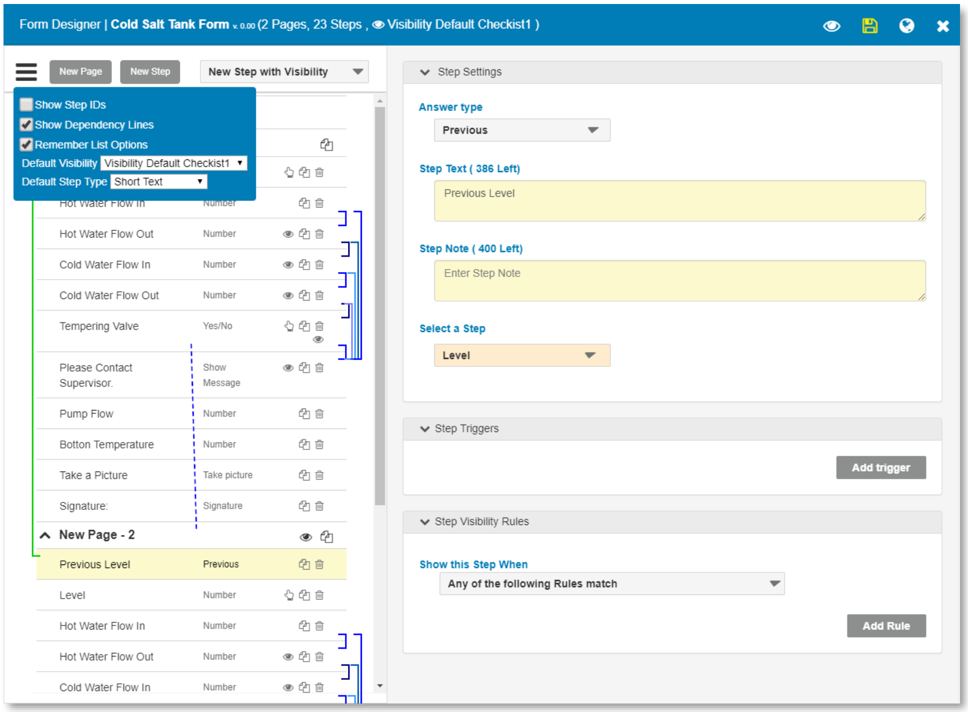
- You may also select specific days of the week or month for a step to be visible. In the example below the step is only visible on forms and tasks that start on the 4th Monday of each month.



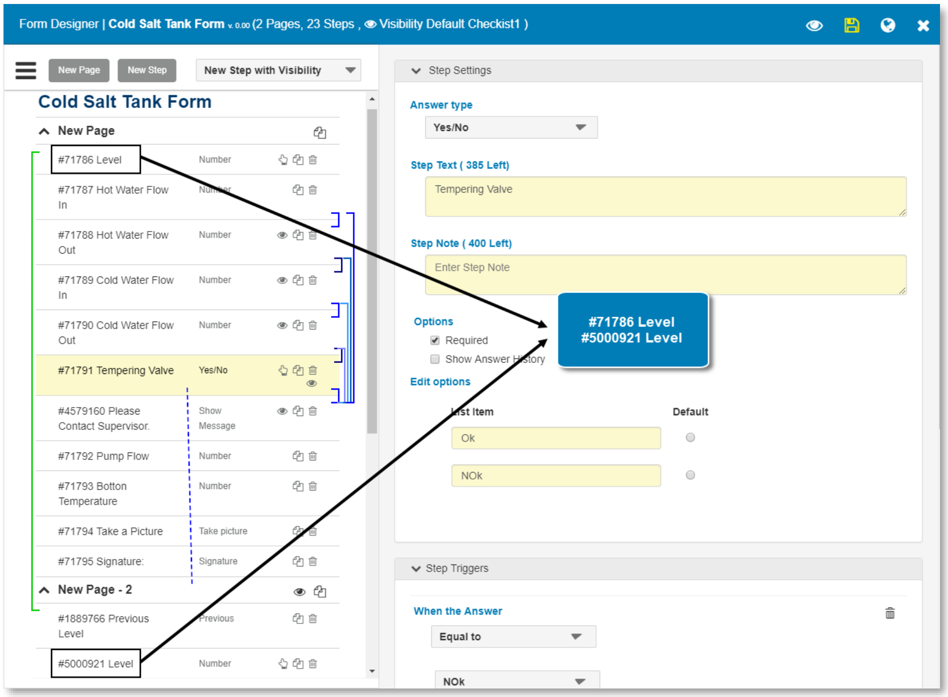
- Note that in the above example both time and day were selected. In this instance, the step is only visible if the round or task starts between 8:00 AM and 5:00PM on the 4th Monday of a month.
- Similarly, you may set multiple visibility timeframes on a single step or page and control visibility based on any or all the specified timeframes.

\- **Additional options in the Form Designer**

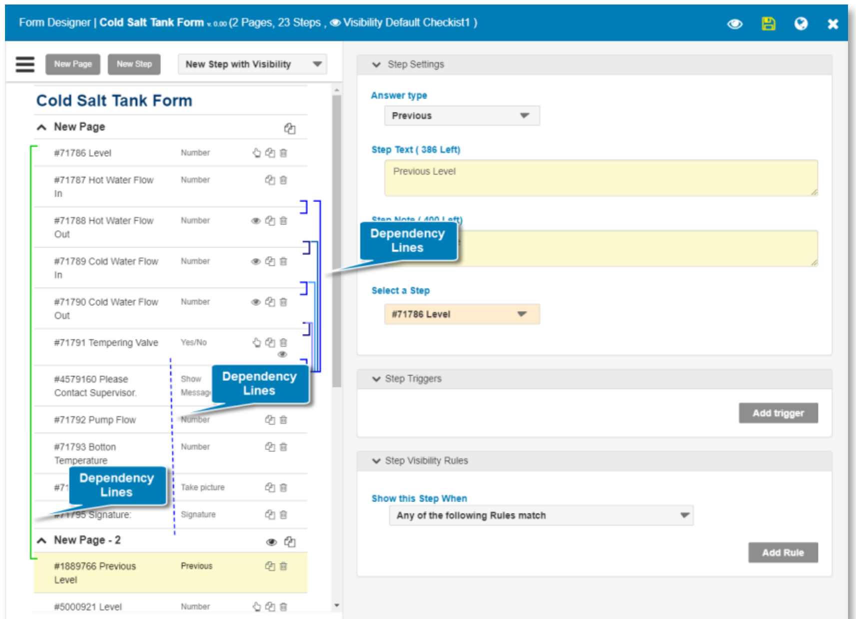
Additional options for the form are available by moving the mouse over ☰ the options icon.



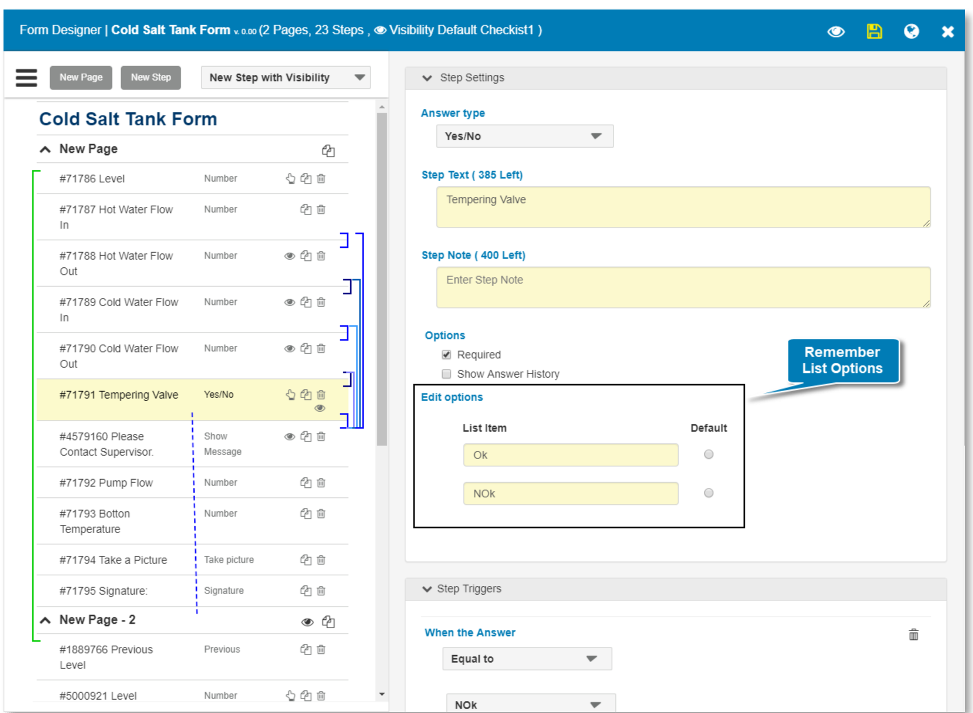
- **Show Step IDs –** Displays the unique ID of each Step question to identify Step questions that contain the same Step Text in cases of validation messages, configure visibility rules, and triggers.



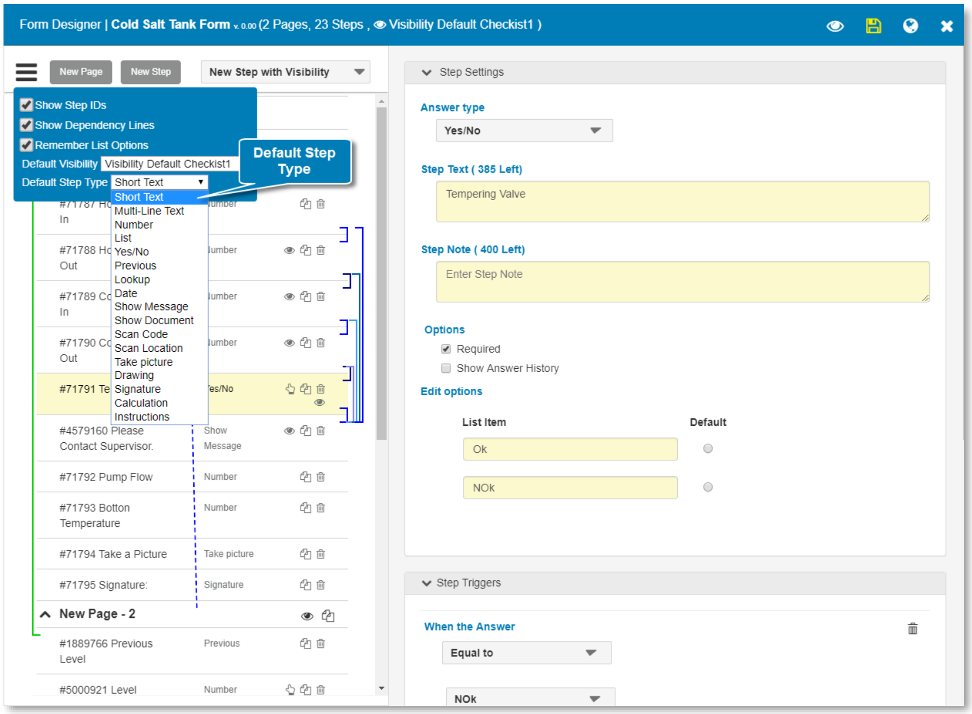
- **Show Dependency Lines** - Each element configured with visibility rules, Picture Triggers or Previous Step will show a line with the dependency. To hide the dependency lines, uncheck the option "Show Dependency Lines".



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



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

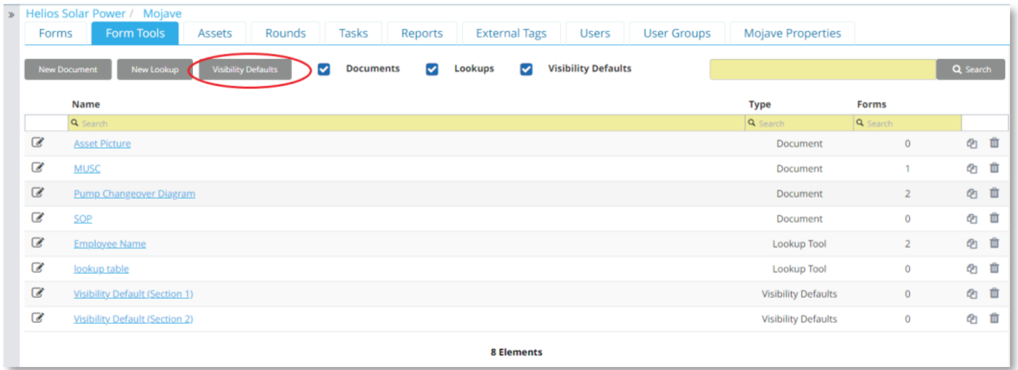


Working with Default Visibility Rules in the Form Designer and Form Tools *[Admin, Editor]*

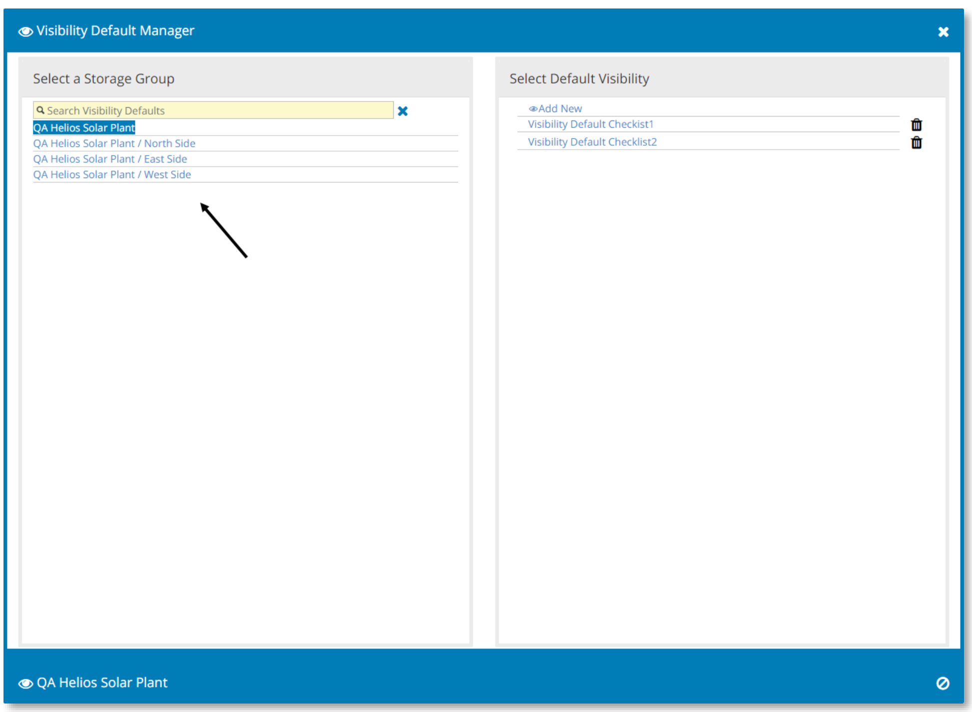
Admin or Editor may create a set of Auto-Visibility defaults that can be used when designing Forms. A default Visibility creates a set of visibility rules for one or more response types that define how the visibility should be created when the step is added. When adding a new step the visibility rule 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.

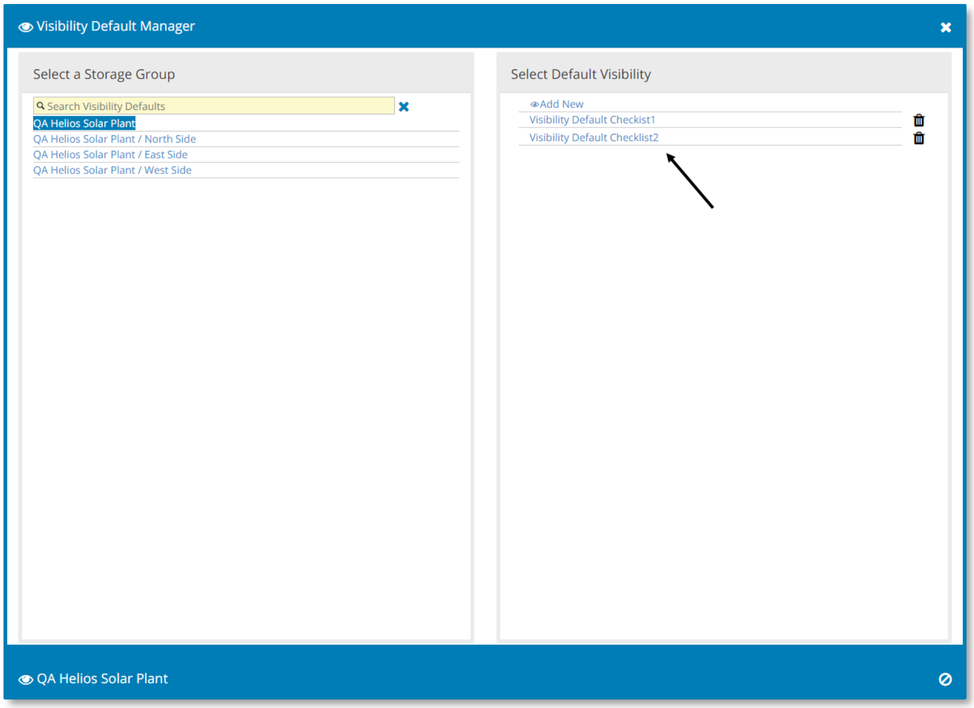
- Select “Visibility Defaults” Visibility Defaults on Forms Tools



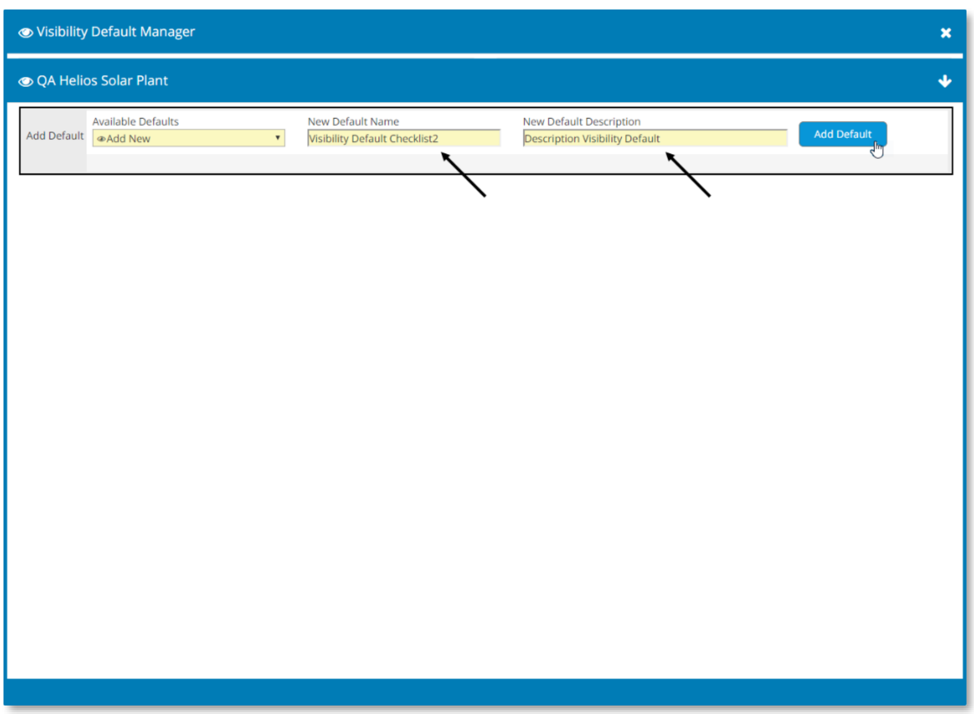
- The Visibility Default Manager window appears. Storage Groups are displayed in Blue on the left side of the screen. Storage Group list on the left allows you to see any Default Visibility in your storage group or below.



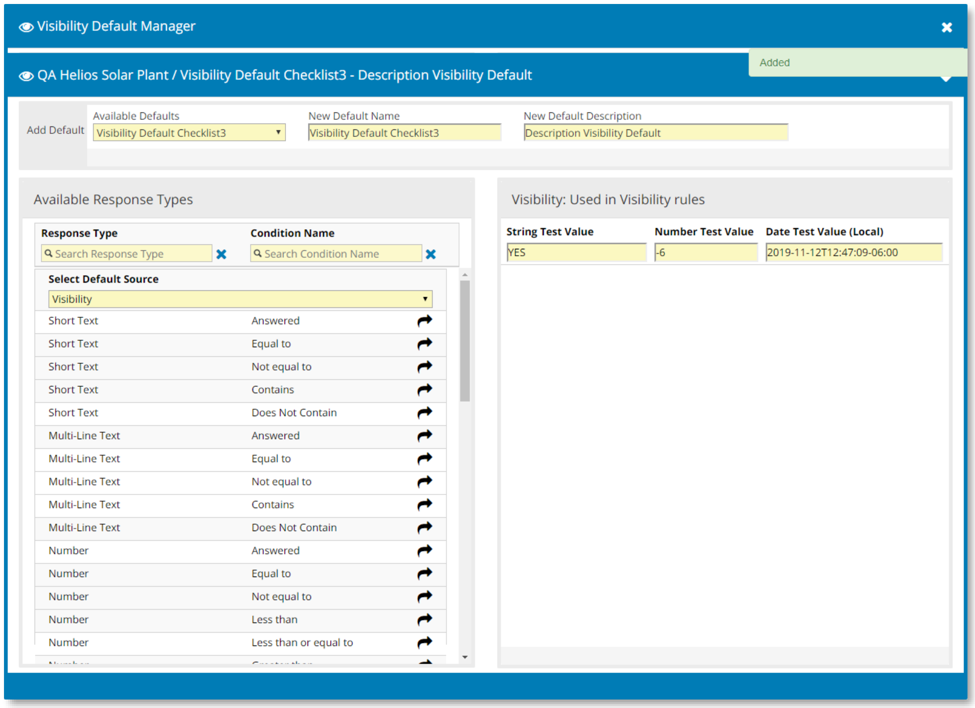
- Available Default Visibility templates for selected Storage Groups are show on the right with the ‘Add New’ or Delete options in the list. Select Add New Default Visibility:



- 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.

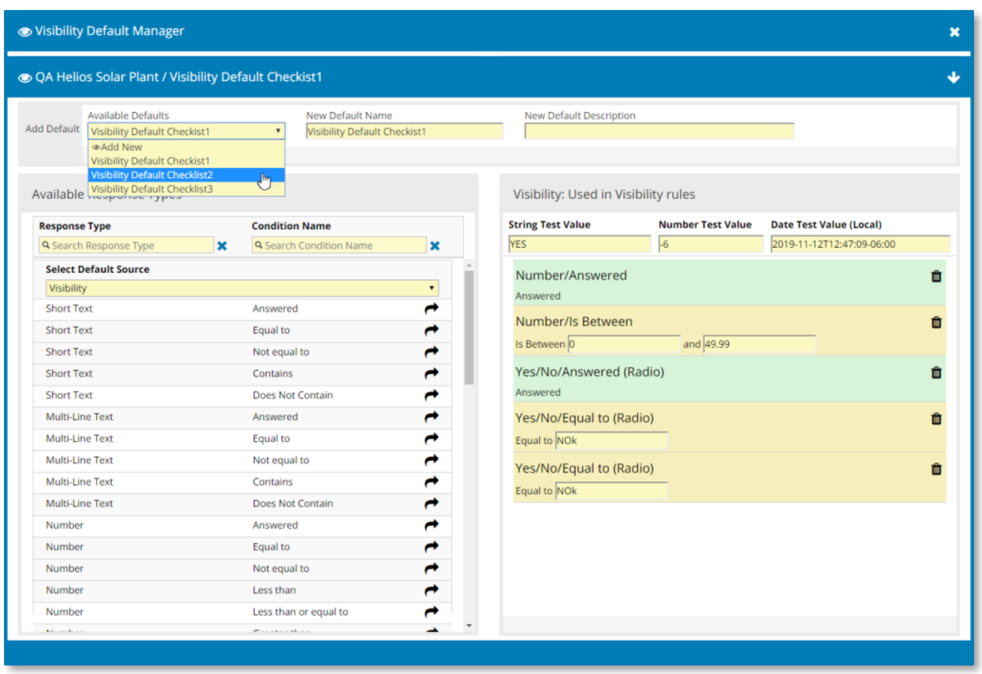


- Click “Add Default” button, the lower part of the screen is filled with available Defaults.

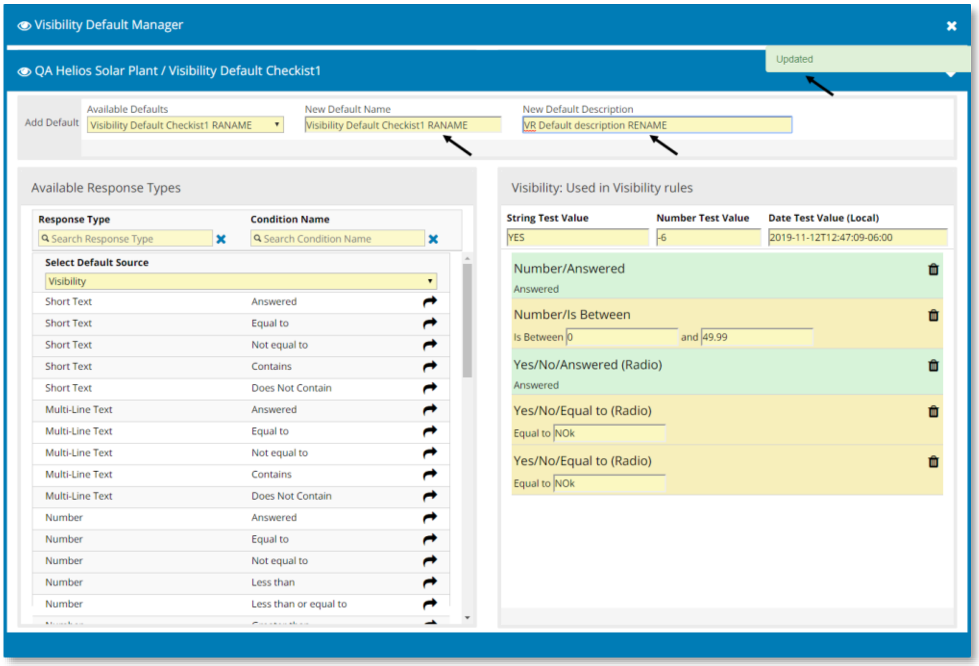


Note: Default name MUST be unique with each Storage Group.

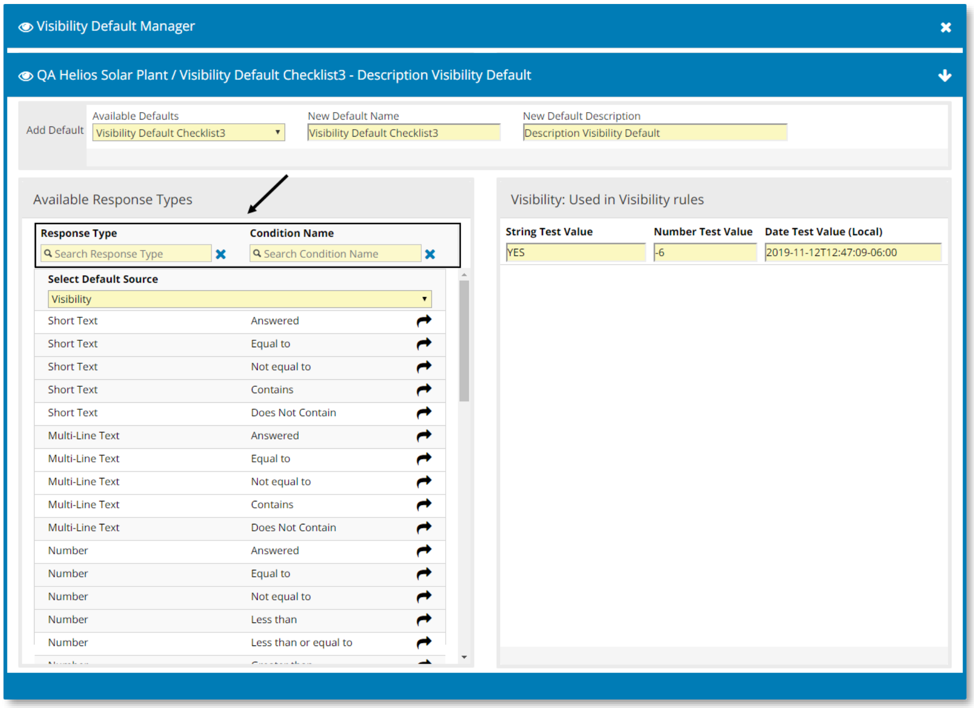
- From the ‘Available Defaults’ dropdown list the user can switch to any other Defaults within the selected Storage Group.



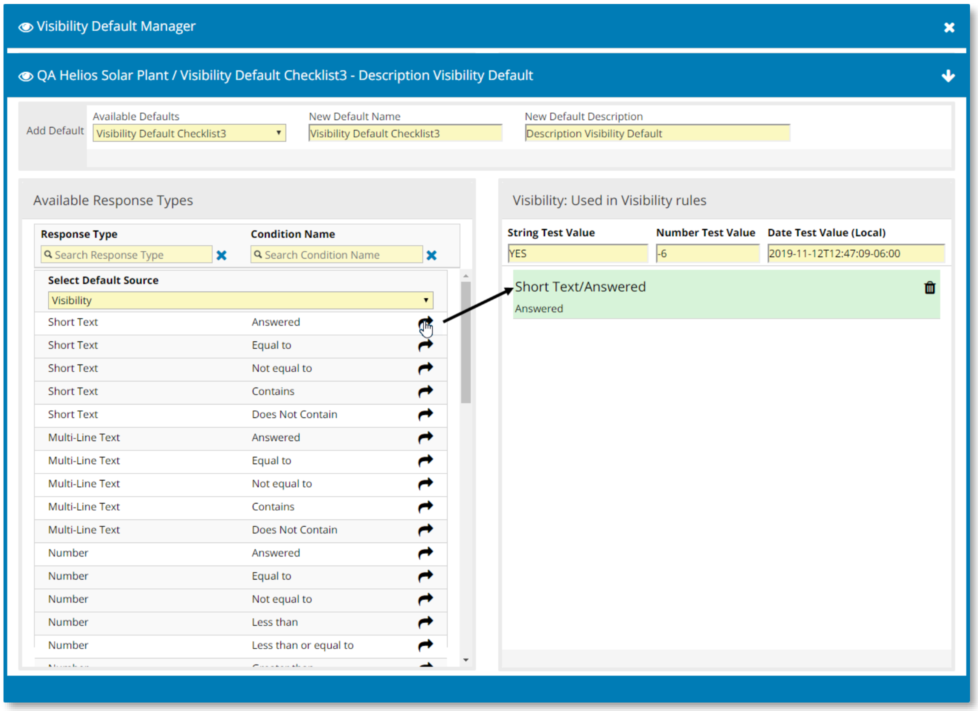
- User can update the Name or the Description. Changes will be auto saved after 1.5 seconds.



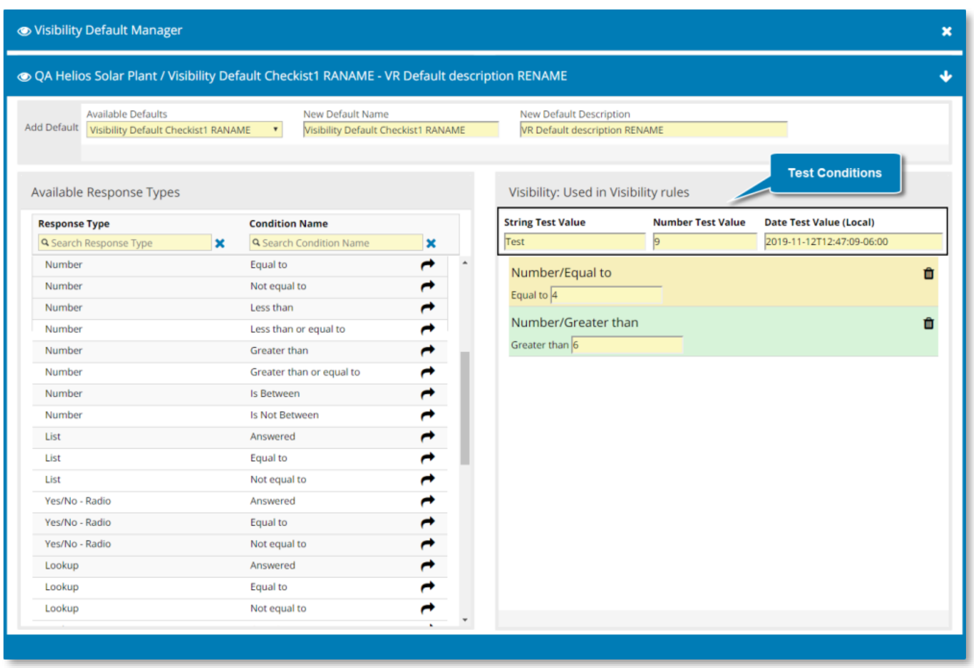
- Available Response Types: This area shows the Response types that are available for assignment to Default Visibility.



- 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.

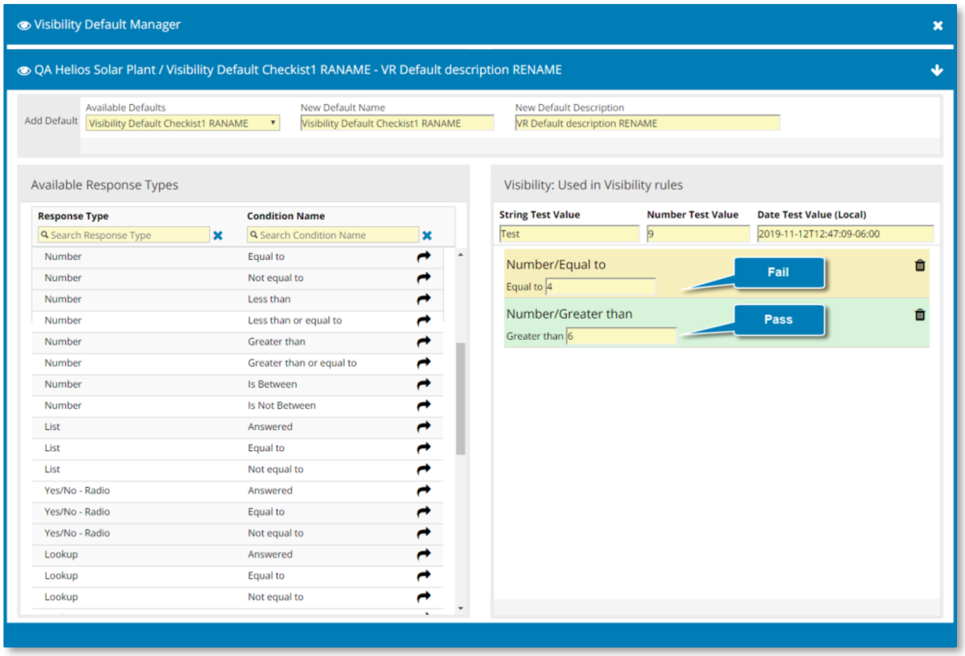


- The list to the right contains any default values that the user has added to this visibility default list. At the top are 3 text boxes used for 'testing' conditions. Each default value will use the test box based on its type. ex 'Short Text' uses 'String Test Value', Number uses 'Number Test Value'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



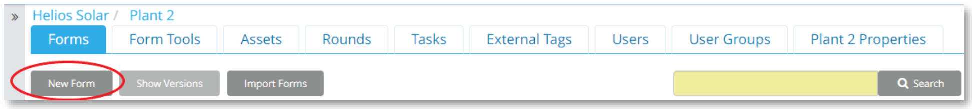
Note: The background color of each condition will change according to if the local validation passes or fails.

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.

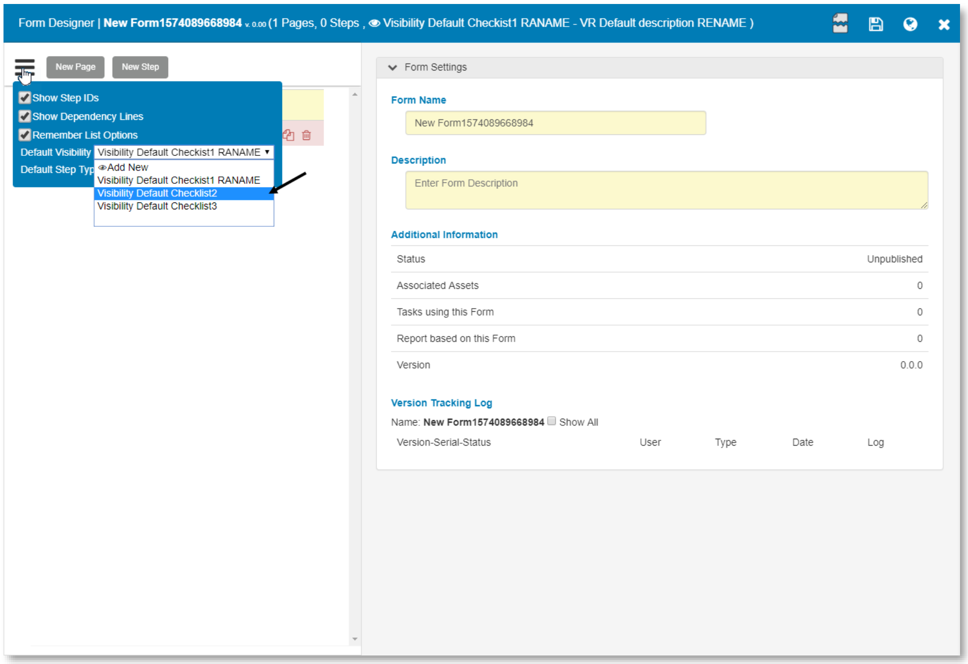


Note: when you type in a value into any condition, it will be auto saved after 1.5 seconds, you can delete a condition clicking on the delete icon. The 3 test values are stored locally and will reload when the user navigates back to this page.

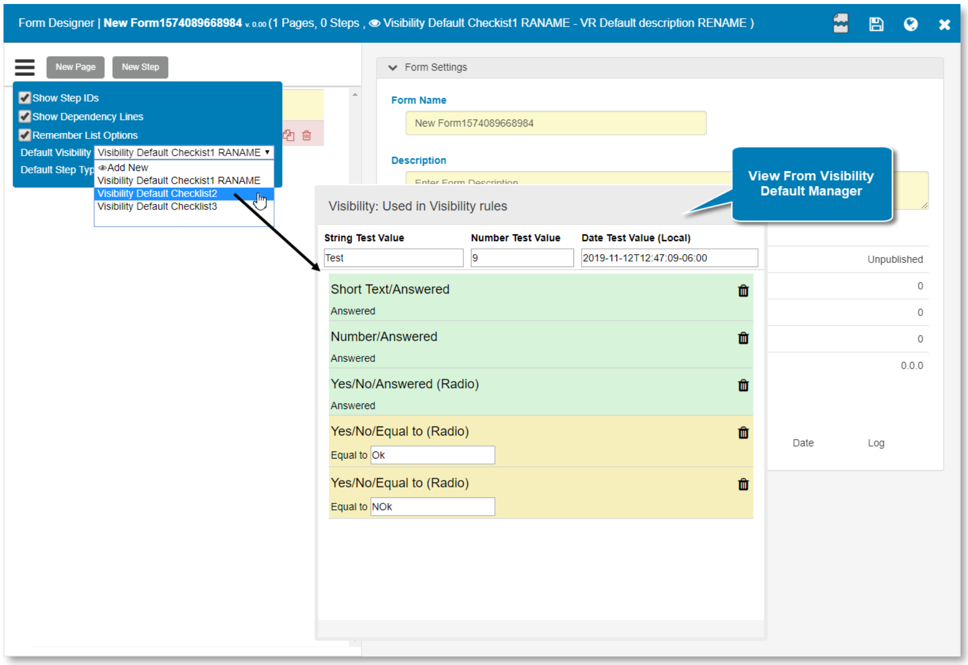
- To create a Form using Default Visibility Rules, Select “New Form” New Form on Forms Designer.



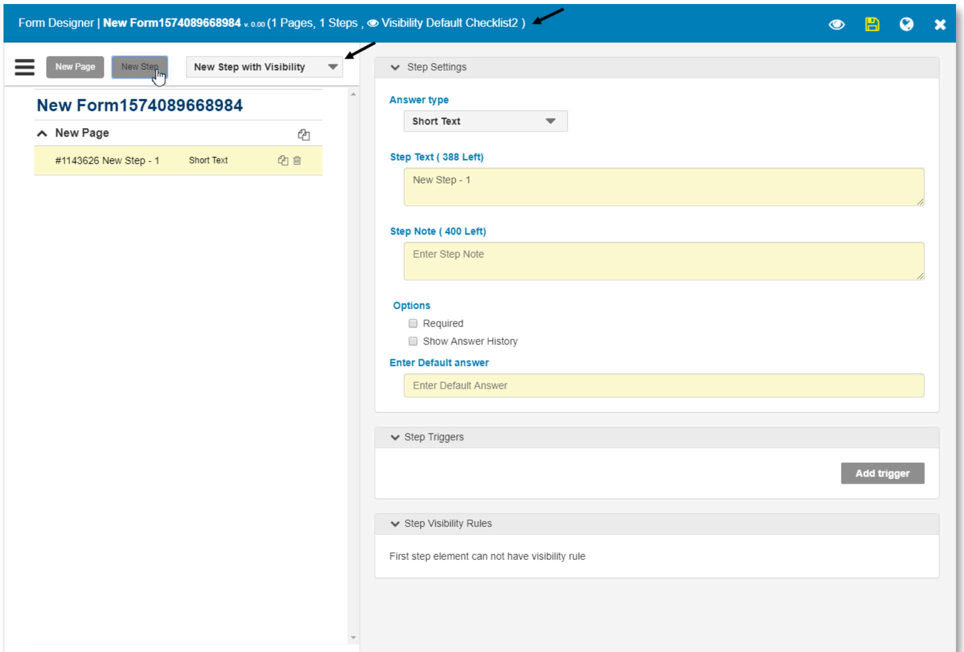
- Mouse over Form Settings icon and select a Default Visibility from the dropdown list.



Note: “Visibility Default Checklist2” has 5 associated rules.

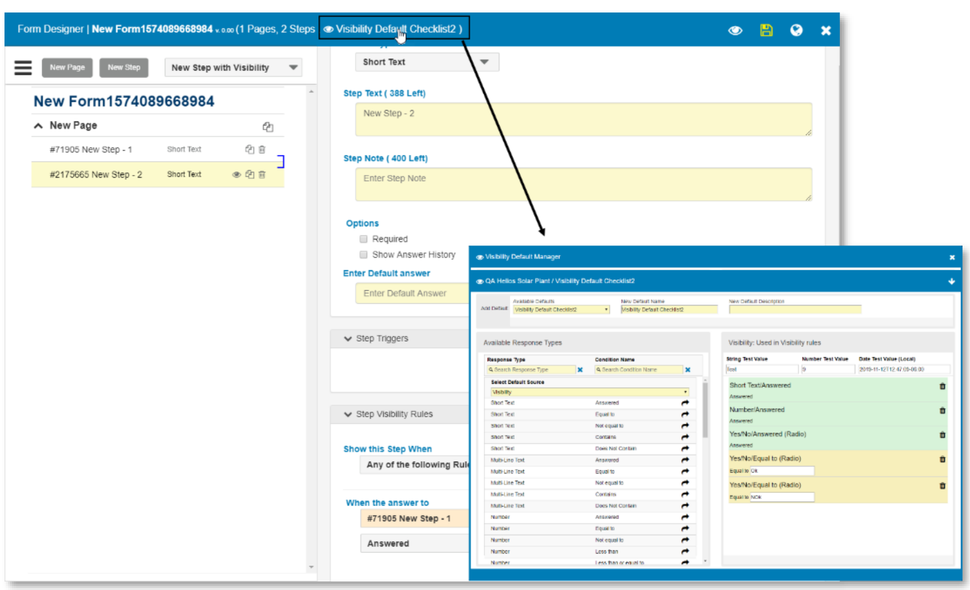


- Click on “New Step”

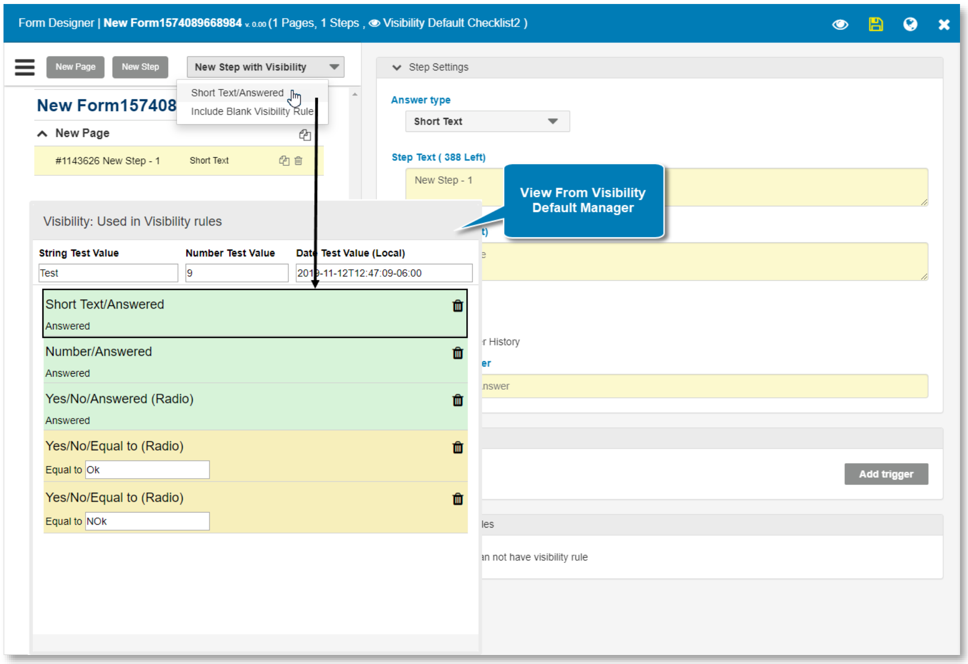


Note: "New Step with Visibility" drop down appears. It will try to match any existing defaults visibility with the current step type and display them in the drop down and the top of the Form Designer will show which Visibility Default is currently selected.

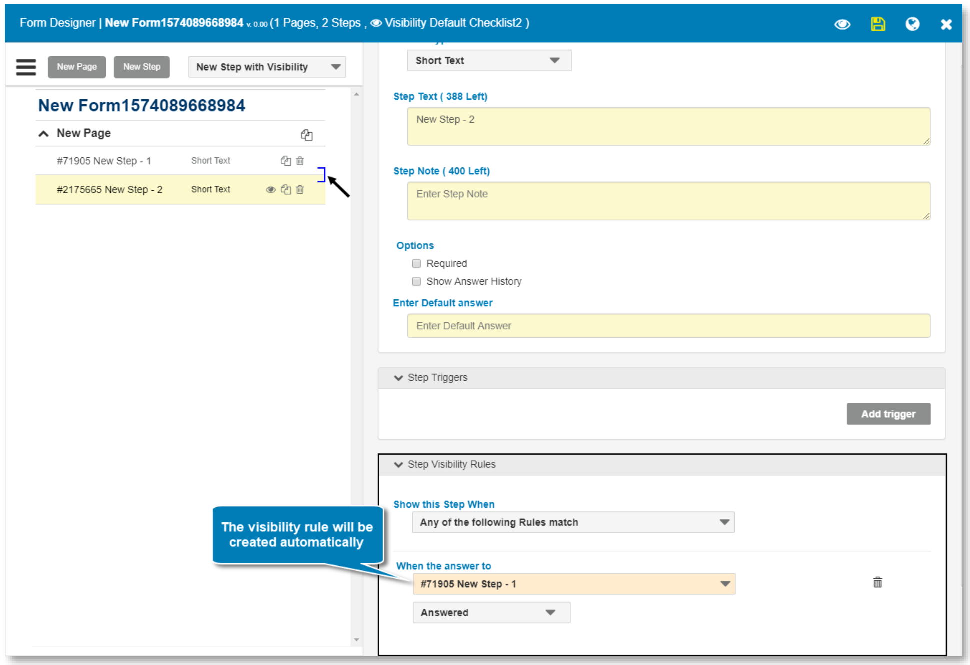
By "clicking" on the Default Visibility name in the Form Designer header it will open the editor with the selected default allowing the user to edit a default.



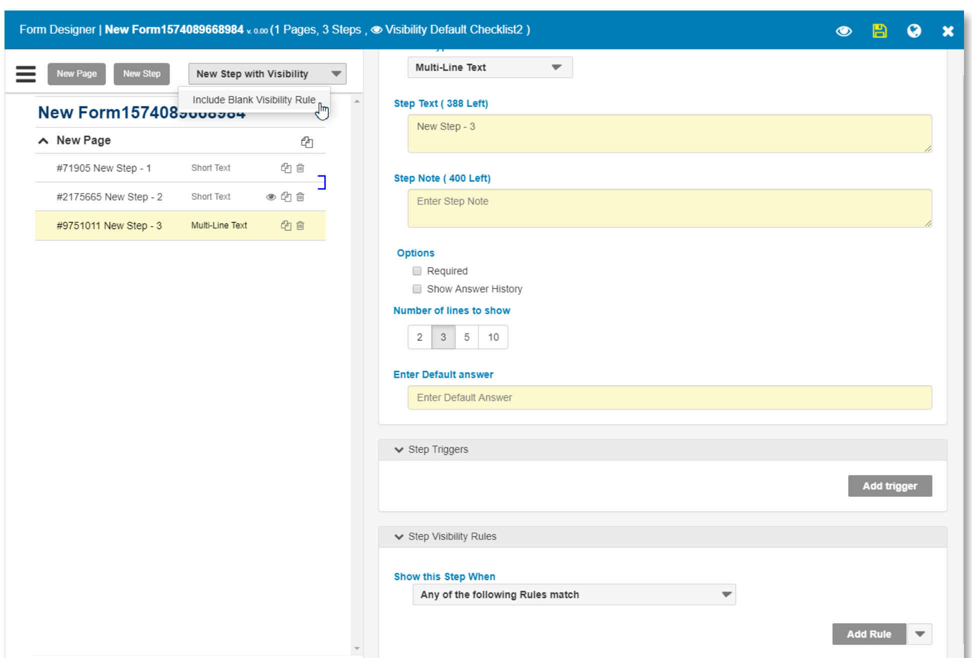
- Click on “New Step with Visibility” and select one rule condition.



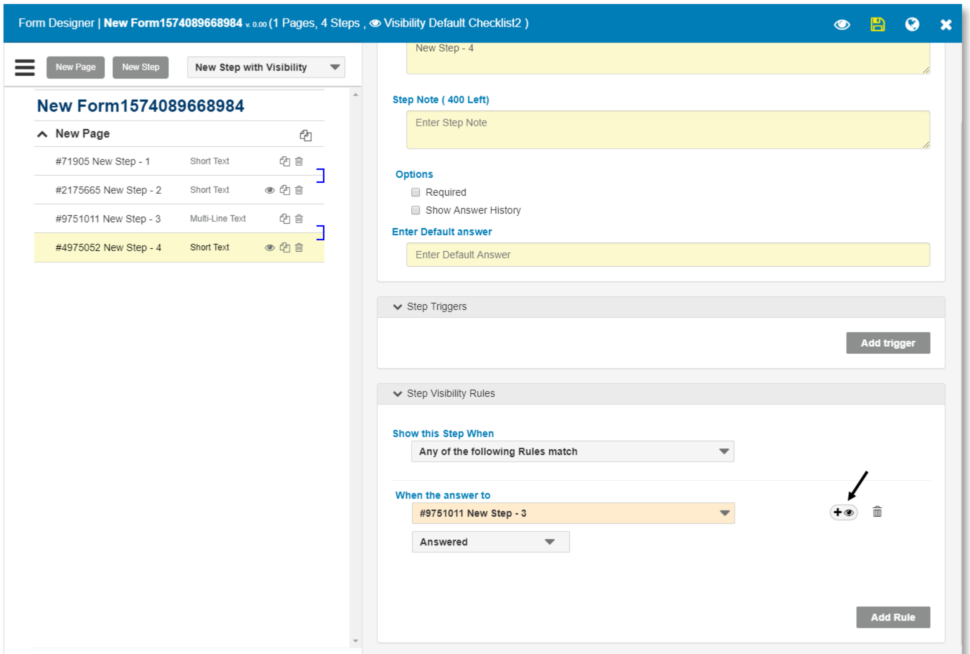
- The Visibility Rule will be created automatically in the new step added.



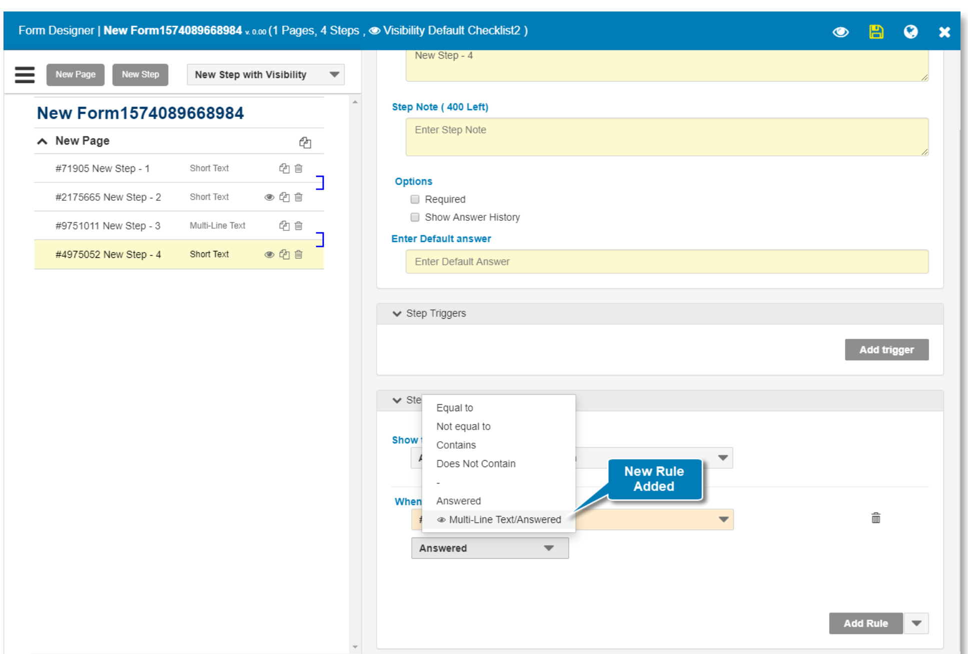
The "Include blank visibility rule" option is used when there is no Rule created for the selected Step question. This button will create a new step and add a blank visibility rule that points to the currently selected step.



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.

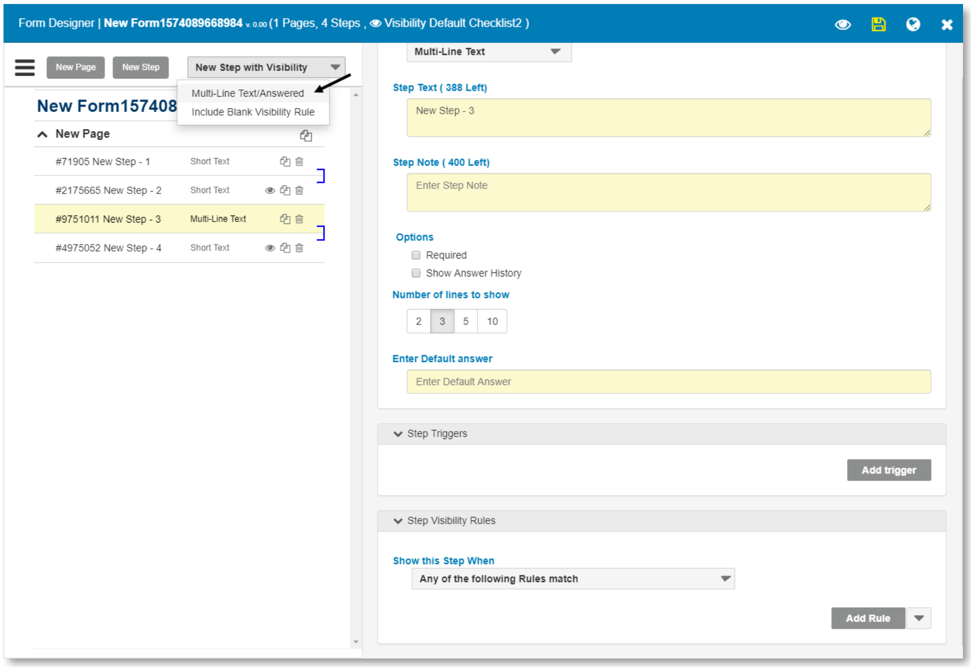


The icon will allow the user to add this visibility rule condition to the currently selected visibility default, once clicked, the new rule will be added and the icon will go away since there is a condition that matches.

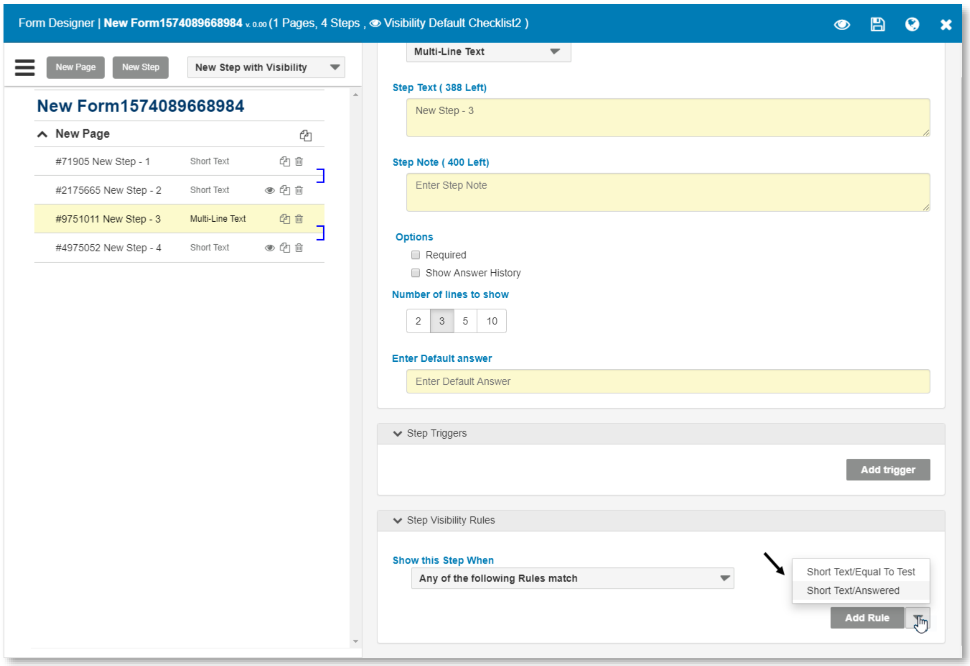


When the user selects the "Condition" drop down, it will show you the normal allowed visibility rule conditions plus any default conditions that exist. In the example case, the user will see the new “Multi-line Text / Answered” condition recently added.

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.



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

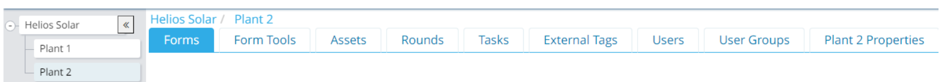


Form Import

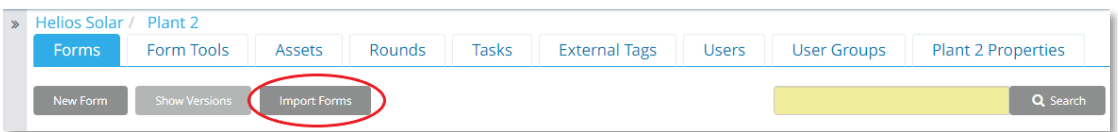
The GoPlant Form Import allows users to import basic form elements, herein defined as “Importable Steps”, to rapidly create the framework required for new form creation.

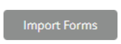
The Form import functionality allows users to import and create a Form from a CSV file created from a csv template or Excel spreadsheet template. After import of basic form data further configuration may be added in the Form Designer such as Email, Asset status, and Exception triggers, or Page visibility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

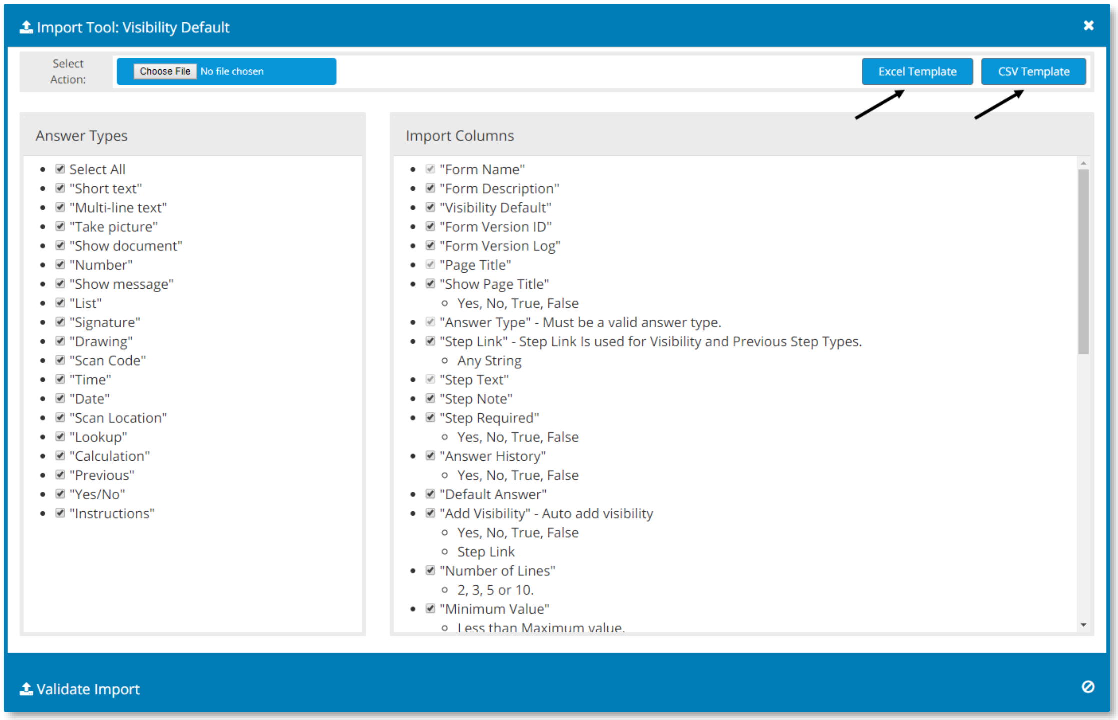
Use the left navigation panel to view the hierarchical structure of your company’s organization. . Select the appropriate Storage Group.



- Select the **Forms** Tab. The **Forms** page appears.

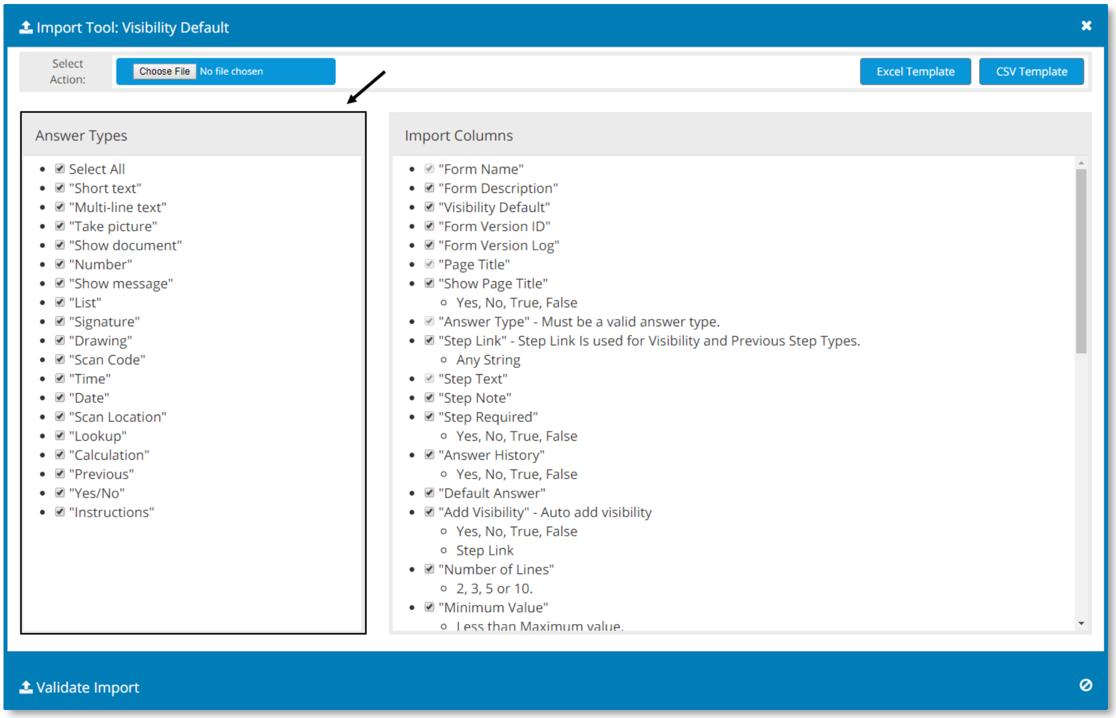


- Click on Import Forms  button.

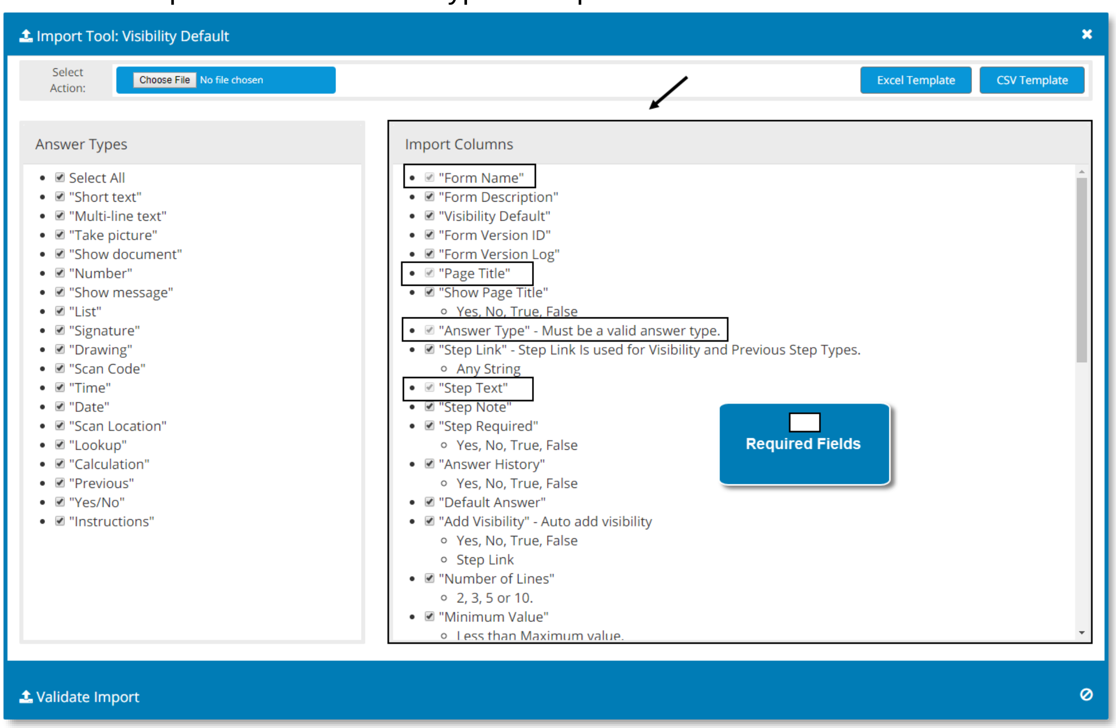


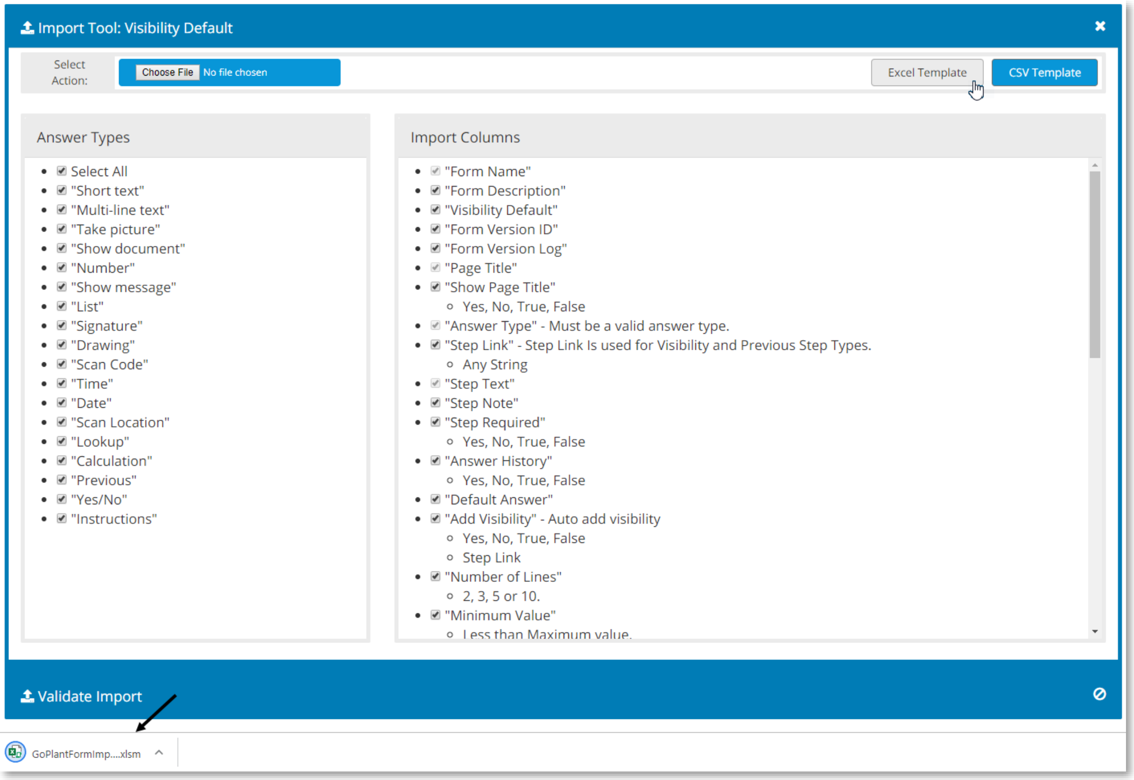
- The Import Tool window will appear. Two types of files may be used for Form Import. A macro enabled Spreadsheet is available from the 'Excel Template' button. A comma delimited file is also available from the 'CSV Template' button. Both methods allow the user to enter Form information and use the file 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.



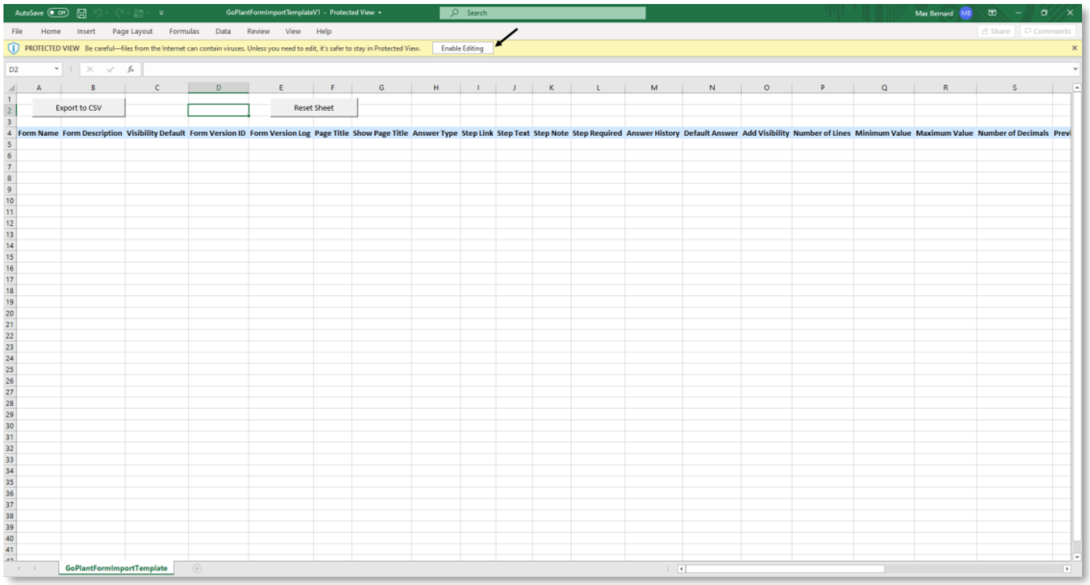
- On the right side the user can select the optional columns that will be included in the template Note: The required fields for each type of response will be disabled.



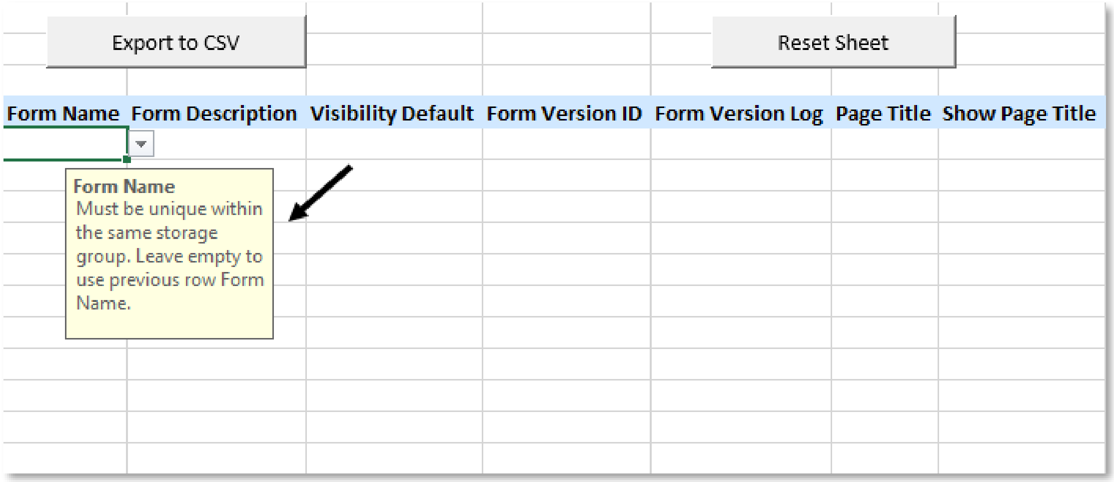


- **Working with the Excel Template for import**

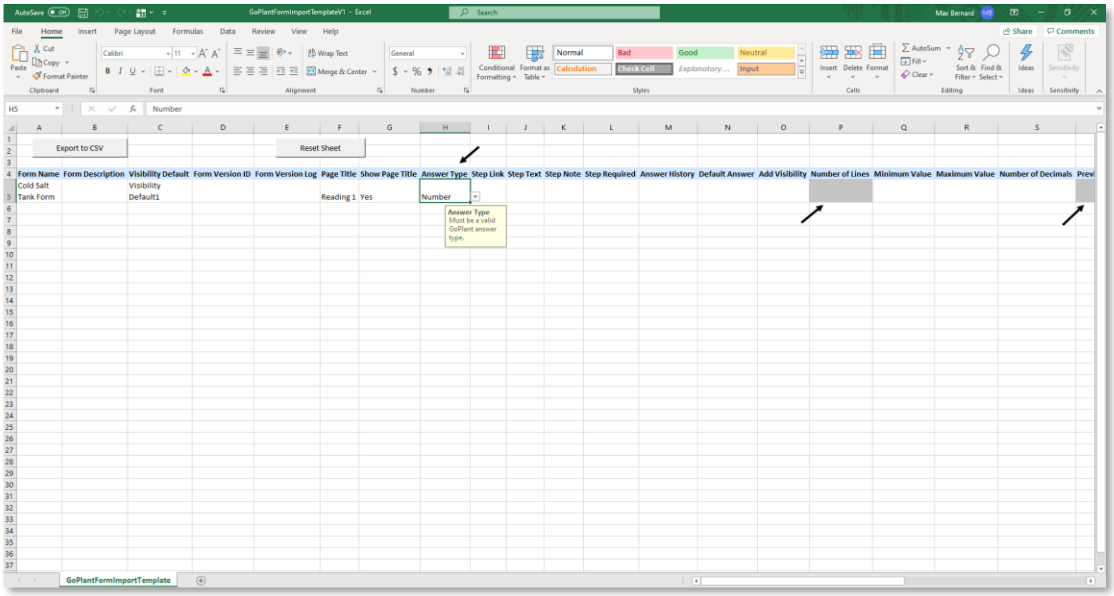
- By Clicking on Excel Template Excel template a new Excel file will be auto generated.
  - NOTE: Your IT department or Company security rules may not allow a macro-enabled spreadsheet to be downloaded. Please contact your IT department if errors or warnings occur.



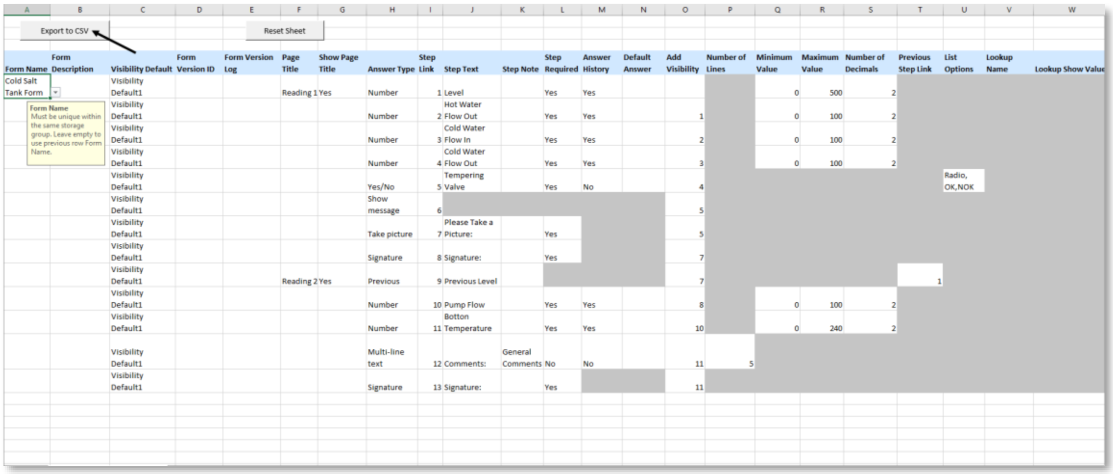
- Click on “Enable Editing”



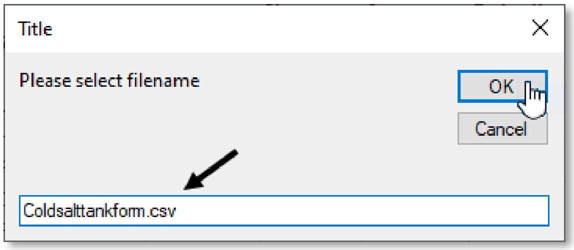
- Clicking on each cell will indicate what value the user must enter in that column.



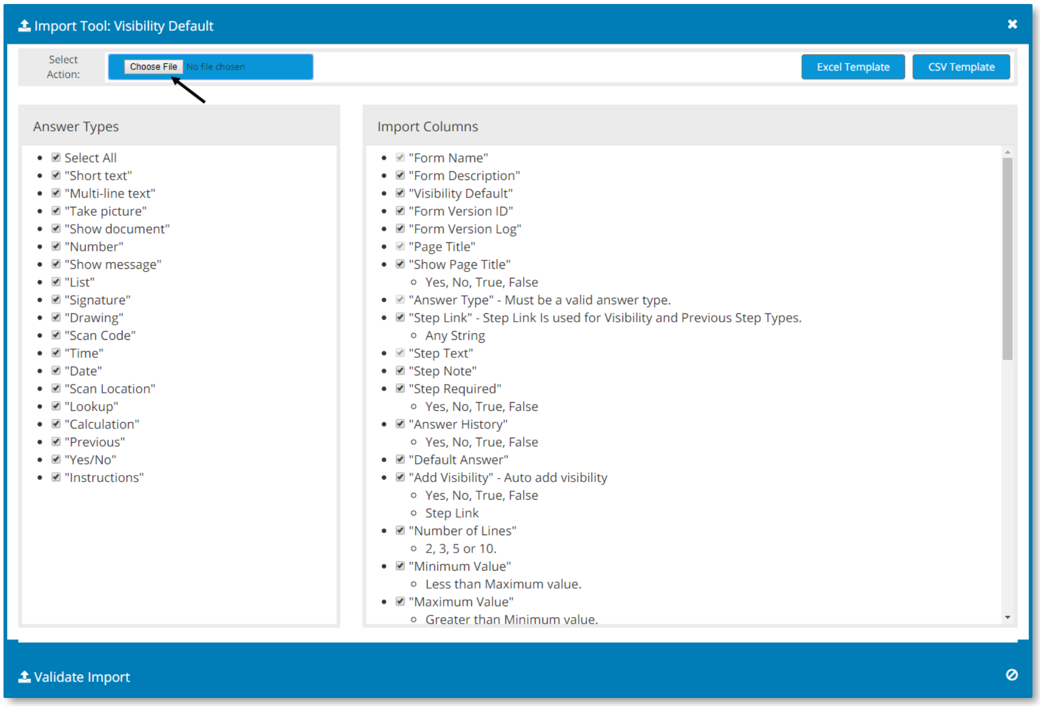
- When the user selects the Answer Type, cells that do not correspond to the Answer type will change to gray. Columns that have the gray color do not need to be filled out for that specific step type.



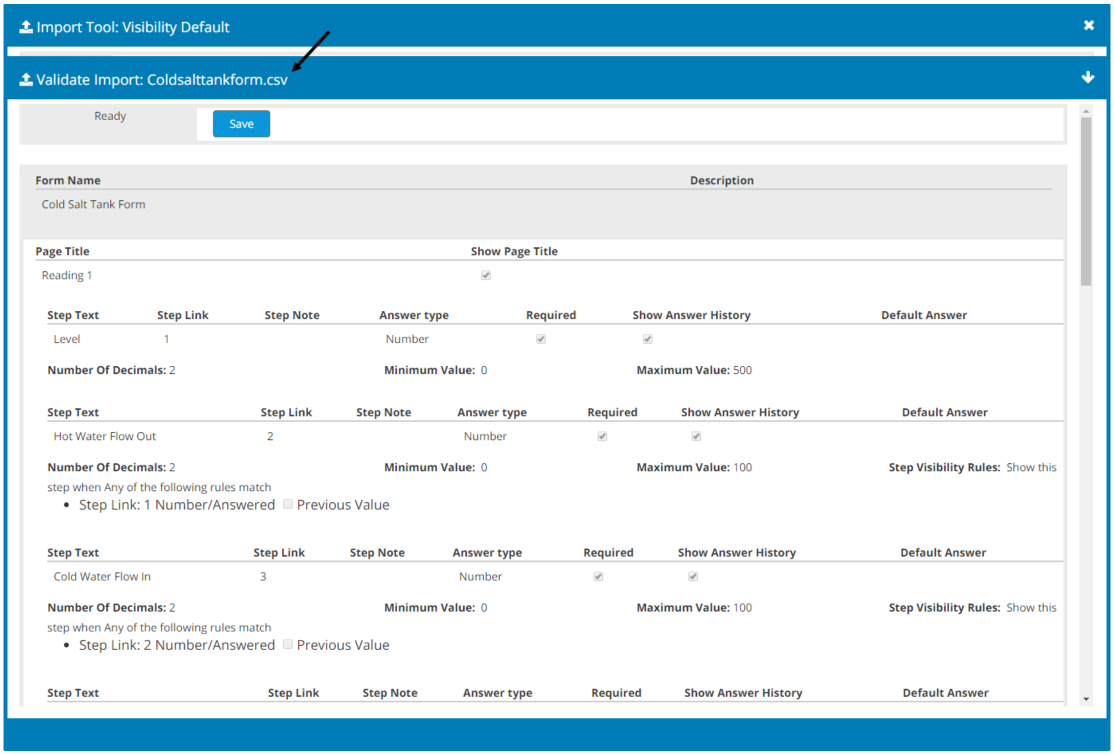
- Complete all steps and press “Export to CSV” button to create the file to be imported.



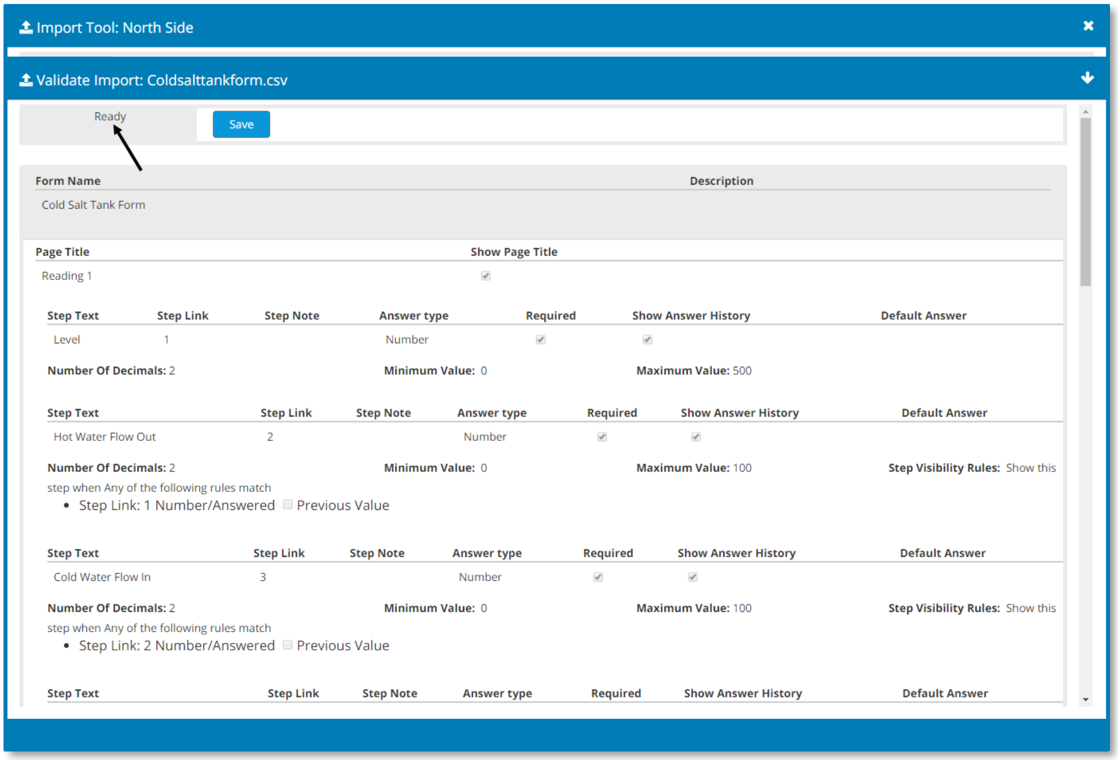
- Enter the file name and press "OK"
- The new CSV file will be created in the same directory where the original excel file was downloaded.



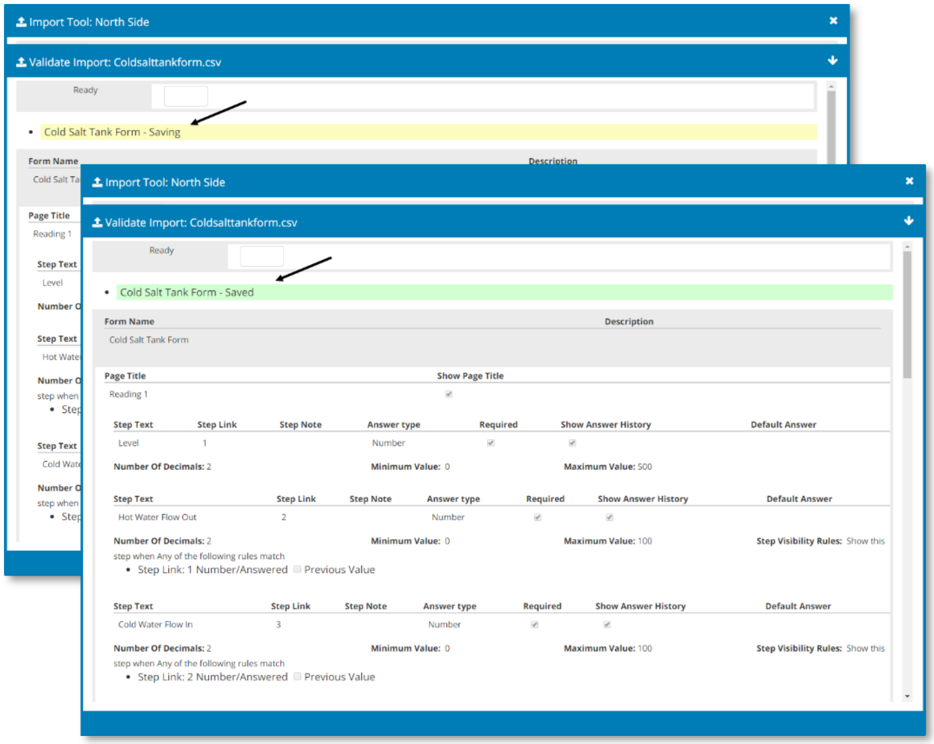
- Select “Choose file” on the Import Tool window and select the csv file



- 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.

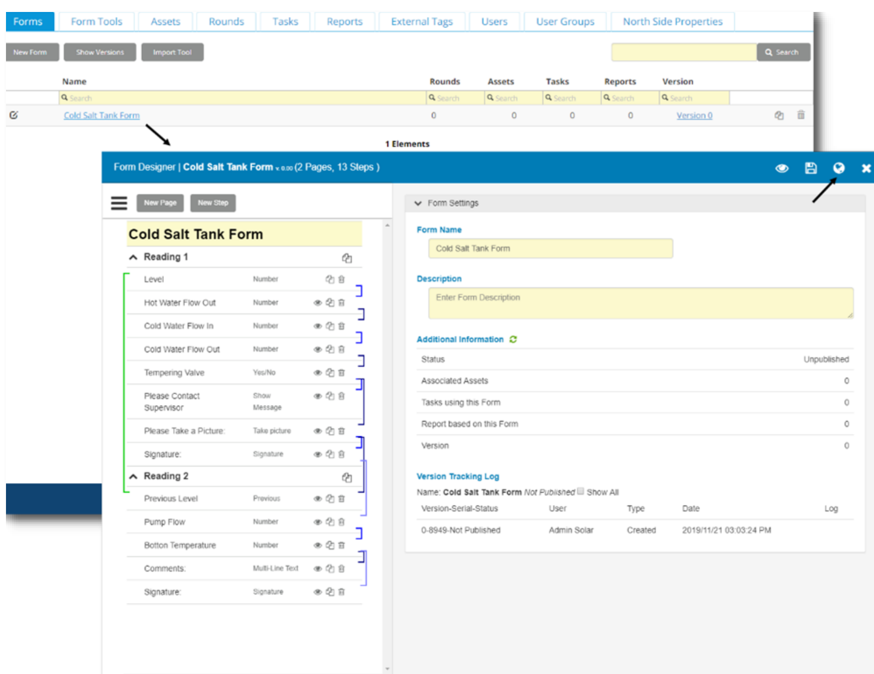


- Press "Save" to create the new Form in the selected Storage Group



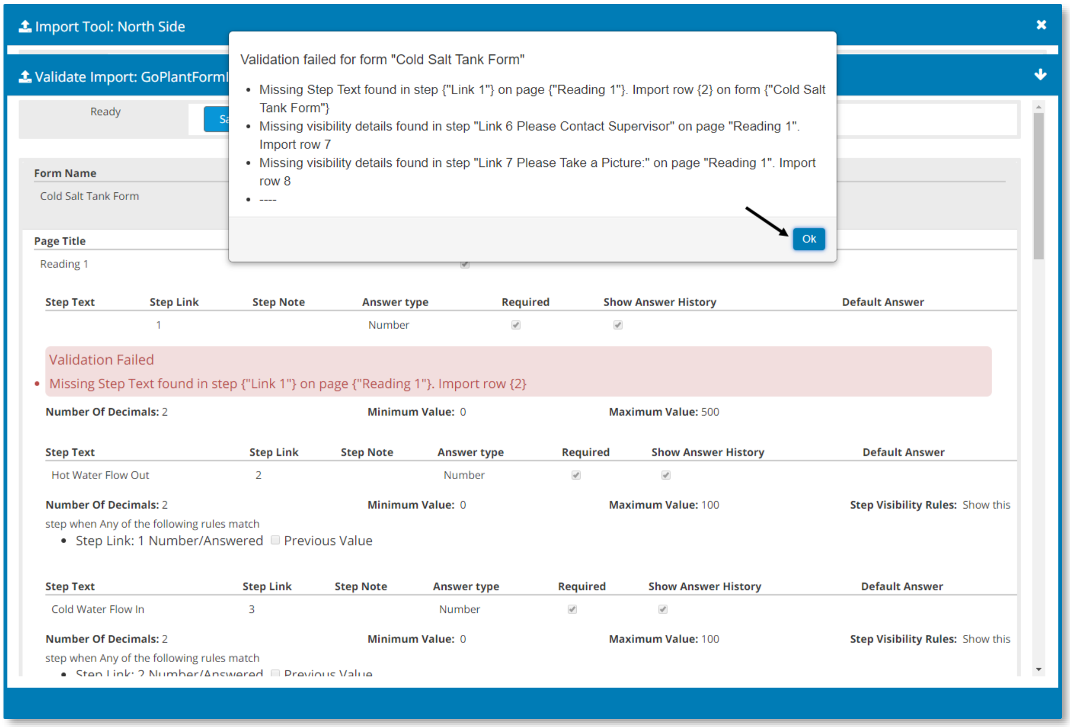
- The status "Saving" and "Saved" will be indicated.
  Note: The time it takes to save the form will depend on the number of steps added.

- The new Form will now appear in the list of forms of the selected Storage Group when you close the Import Tool design window.

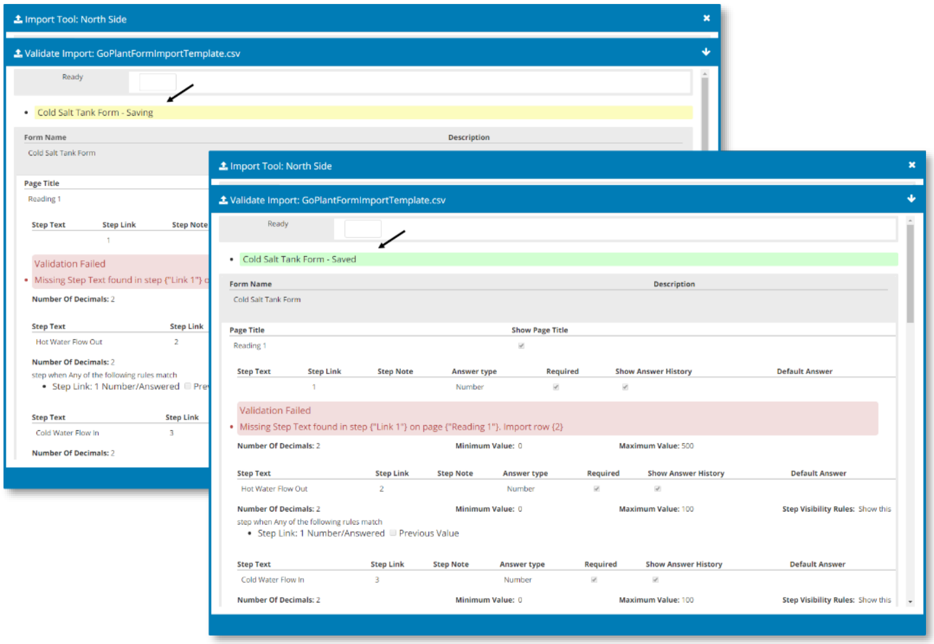


Note: *The form must be published before it can be used!*

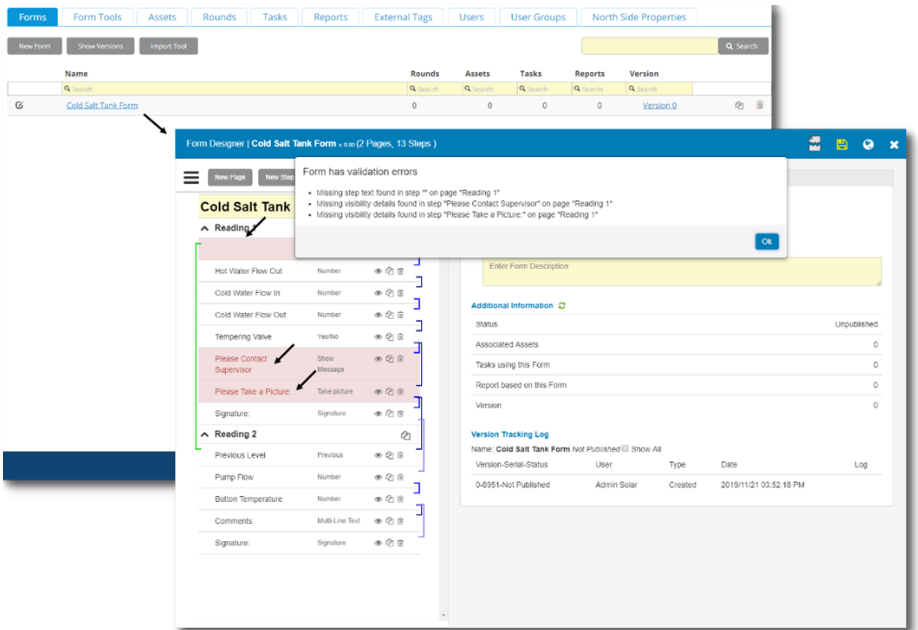
- If the csv file has validation problems a pop-up window will appear indicating the errors found. Each error will also display the row number within the file so that they can easily be corrected. Make a note or take a screenshot to remember all errors and fix them before attempting to import.



- 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.



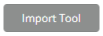
- The status "Saving" and "Saved" will be indicated.
  Note: The time it takes to save the form will depend on the number of steps added.
- After the import is finished close the Form Import window to return to the Forms tab listing. Locate the imported Form and click to open it in the Form Designer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



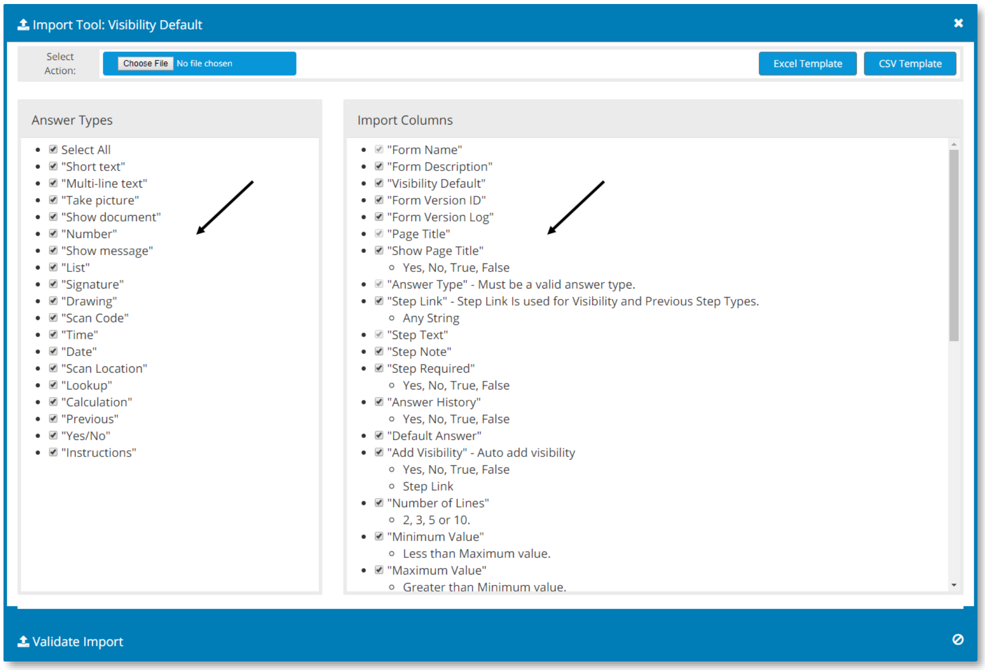
Note: The user must solve the validation errors before publishing.

- **Working with CSV Template**

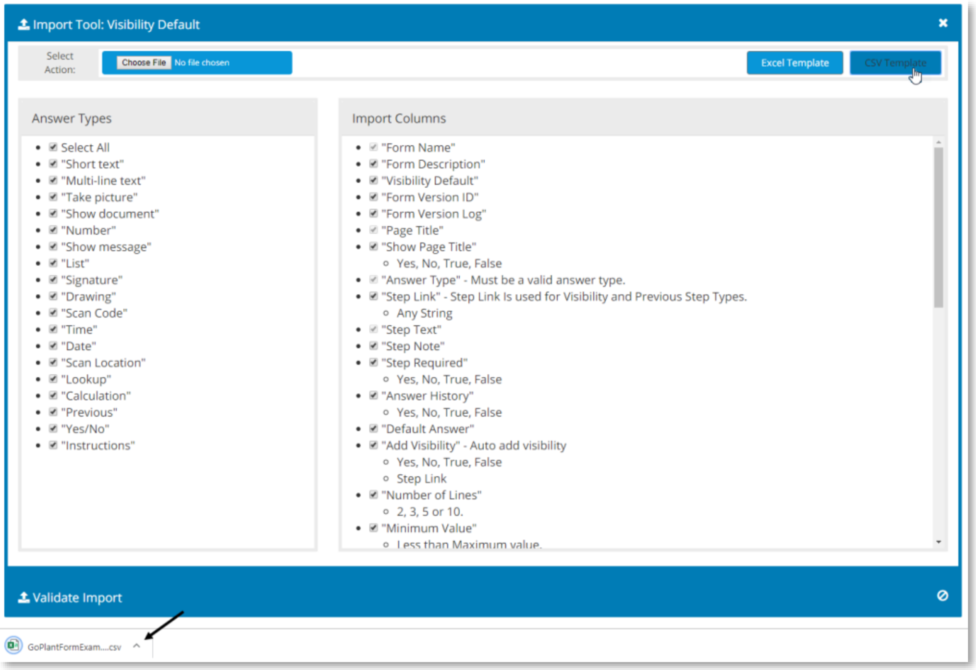
In addition to the Excel Template, the ‘CSV Template’ button will generate a CSV file based upon the Answer types chosen in the column and the Import Column items chosen. This allows for custom selection of the actual import file columns that will be available. Users may want to eliminate columns that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

- Click on “Import Tool” 

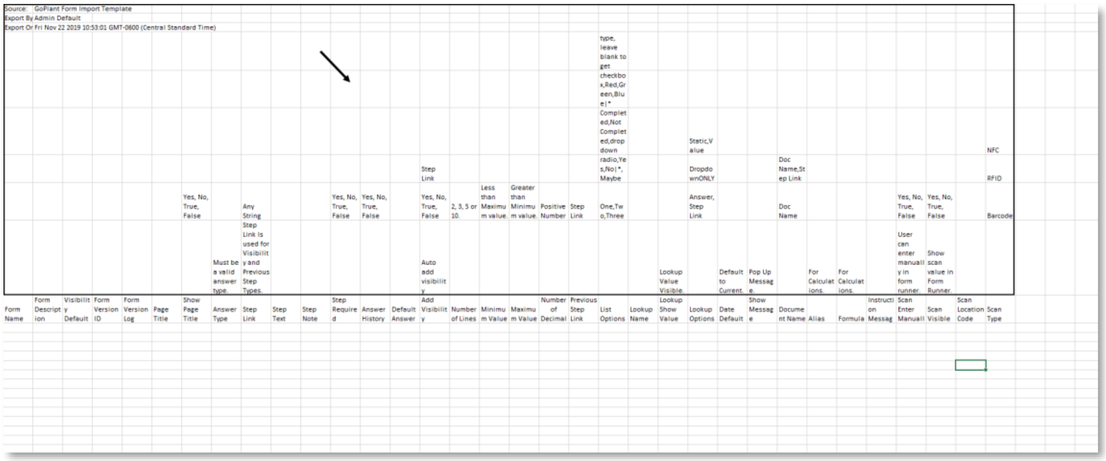
 button.



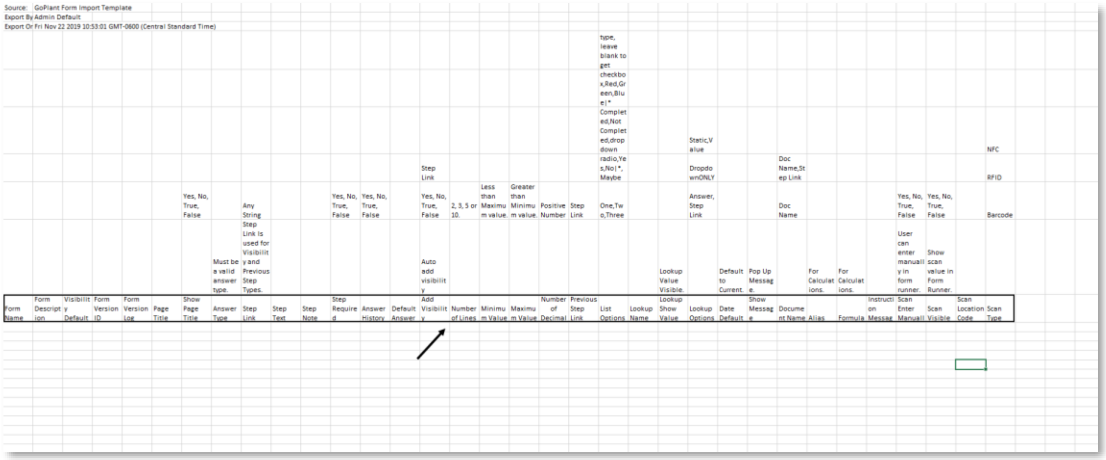
- Select the Answer Types and Import Columns options to generate the CSV file.



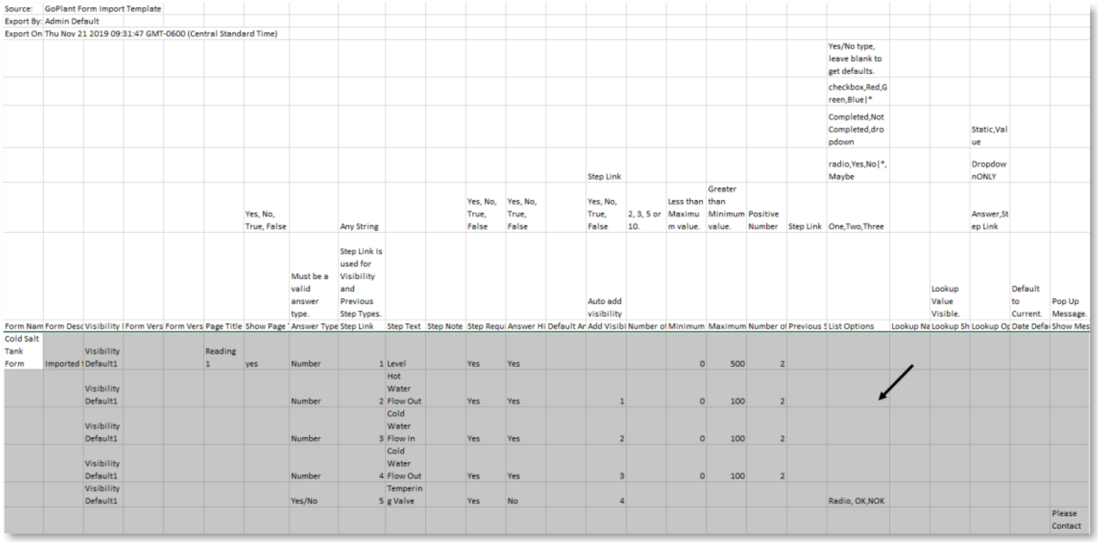
- By Clicking on CSV Template CSV Template a new csv file will be auto generated.
- Open the CSV file.



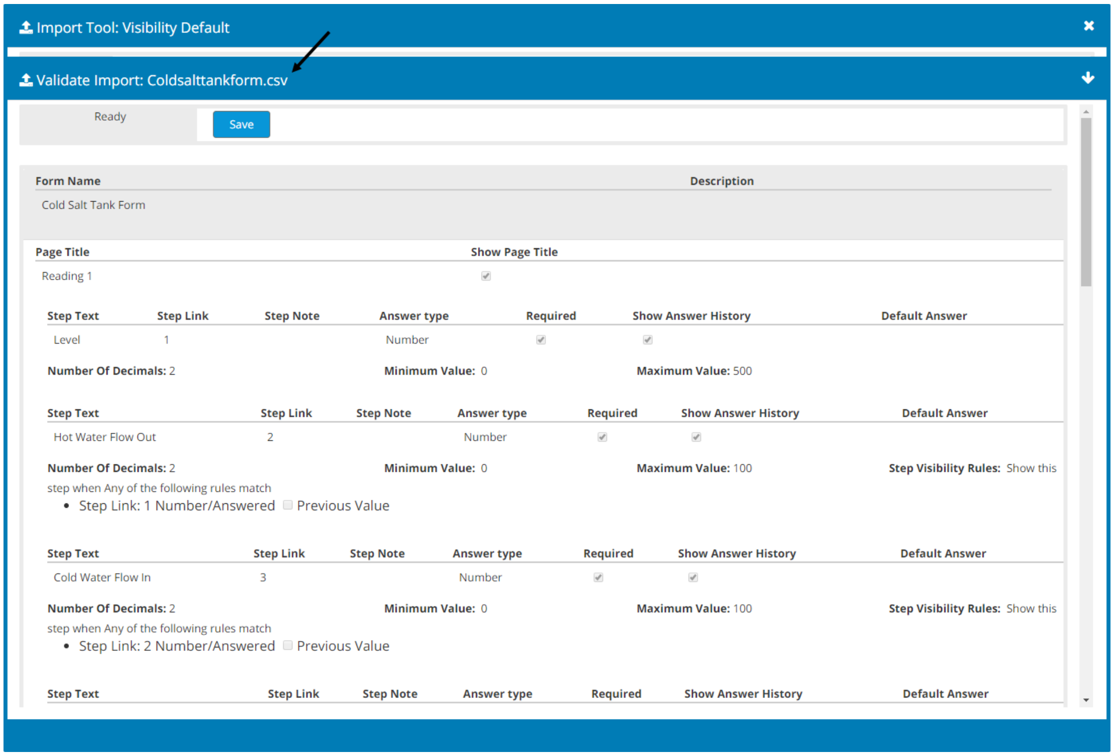
- Row 1 to row 9 shows complementary information for the user and examples of responses. Because this is not a macro enabled file, the help information and instructions were placed in the first 9 rows of the file. These extra rows will be ignored upon input to GoPlant.



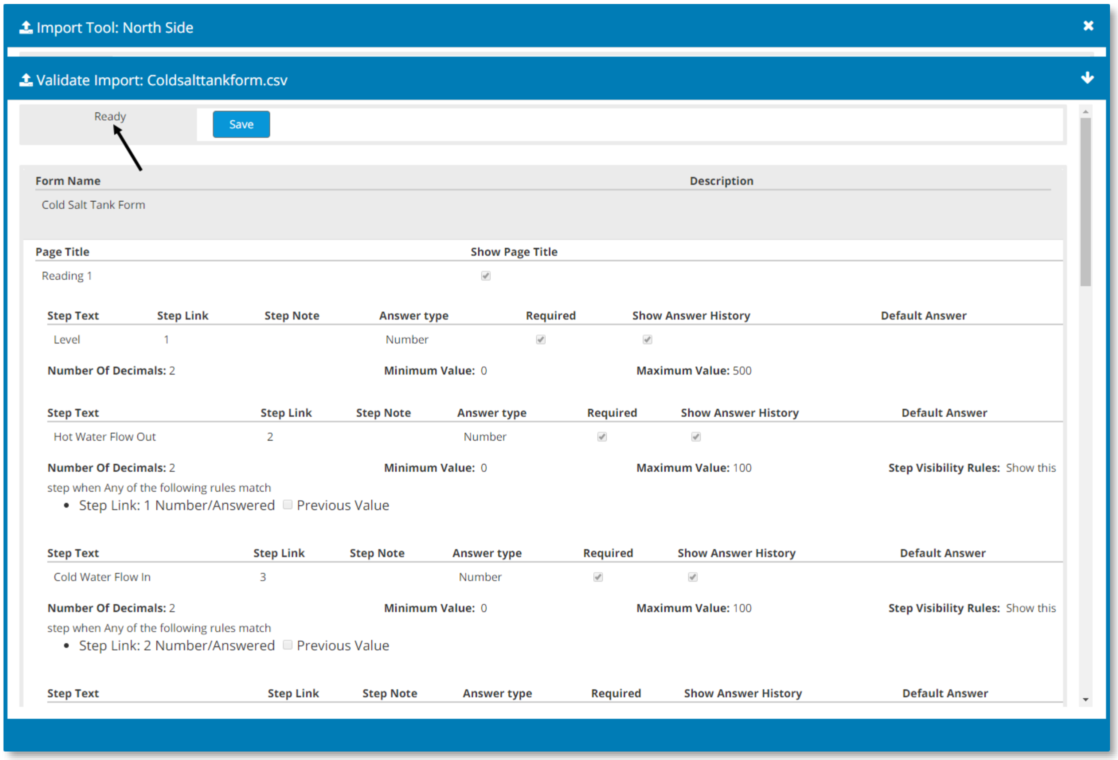
- Row 10 shows all fields selected in the import tool options.



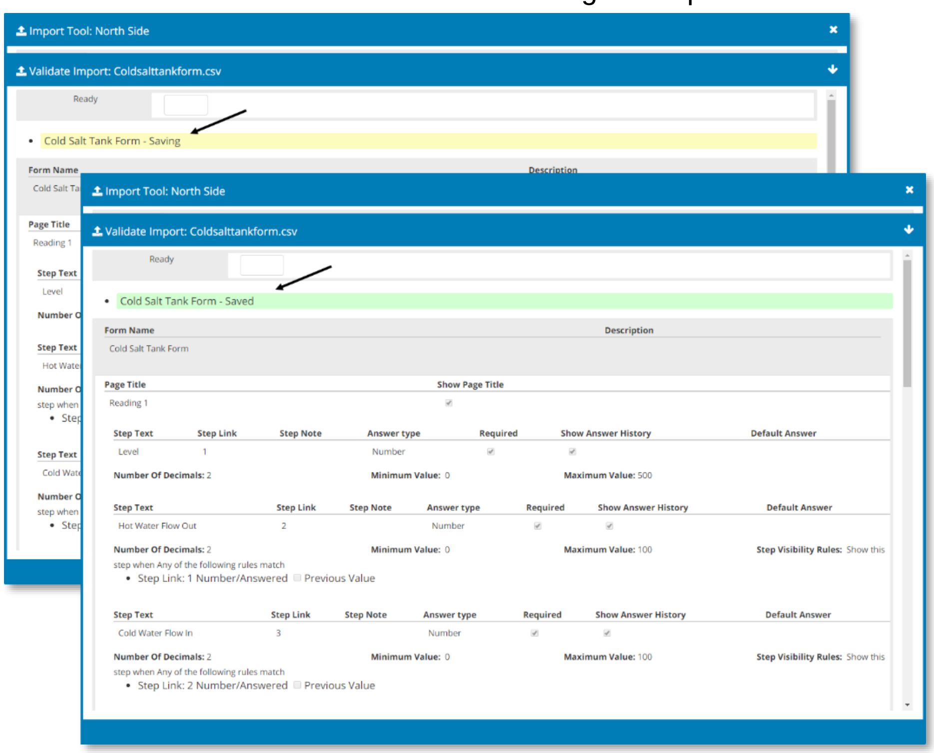
- Complete the CSV file and save it in CSV format UTF-8 (Comma delimited) (* .csv)
- Note that if UTF-8 format is not used special characters and double-byte language text will not work properly.
- All Column header labels must remain in the English Language.
- Select “Choose file” on the Import Tool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



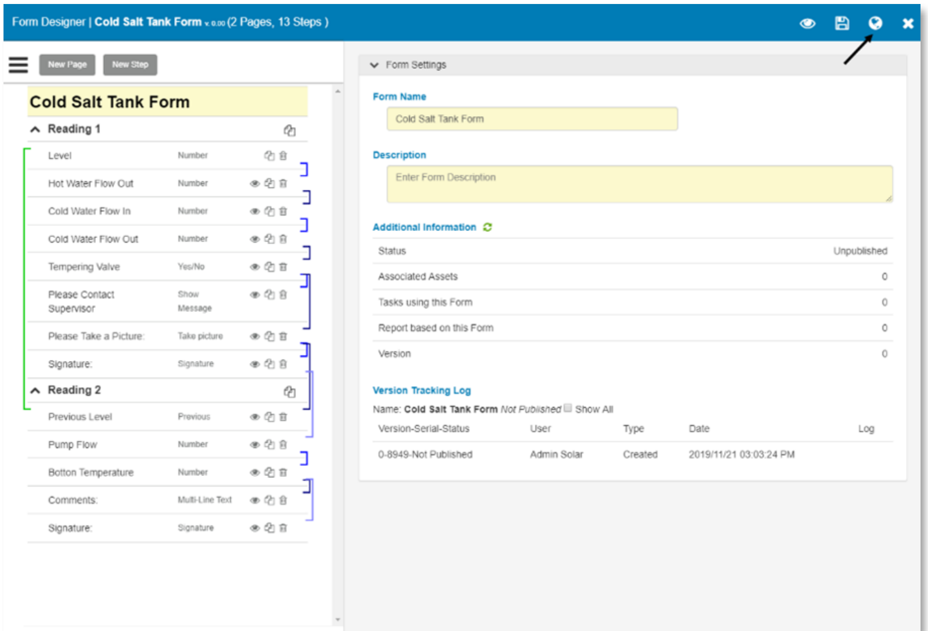
- A validation window will appear with all the configuration of the form imported from the csv file. Note: The upper left corner will indicate "Ready" if the form passed the form validations.



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

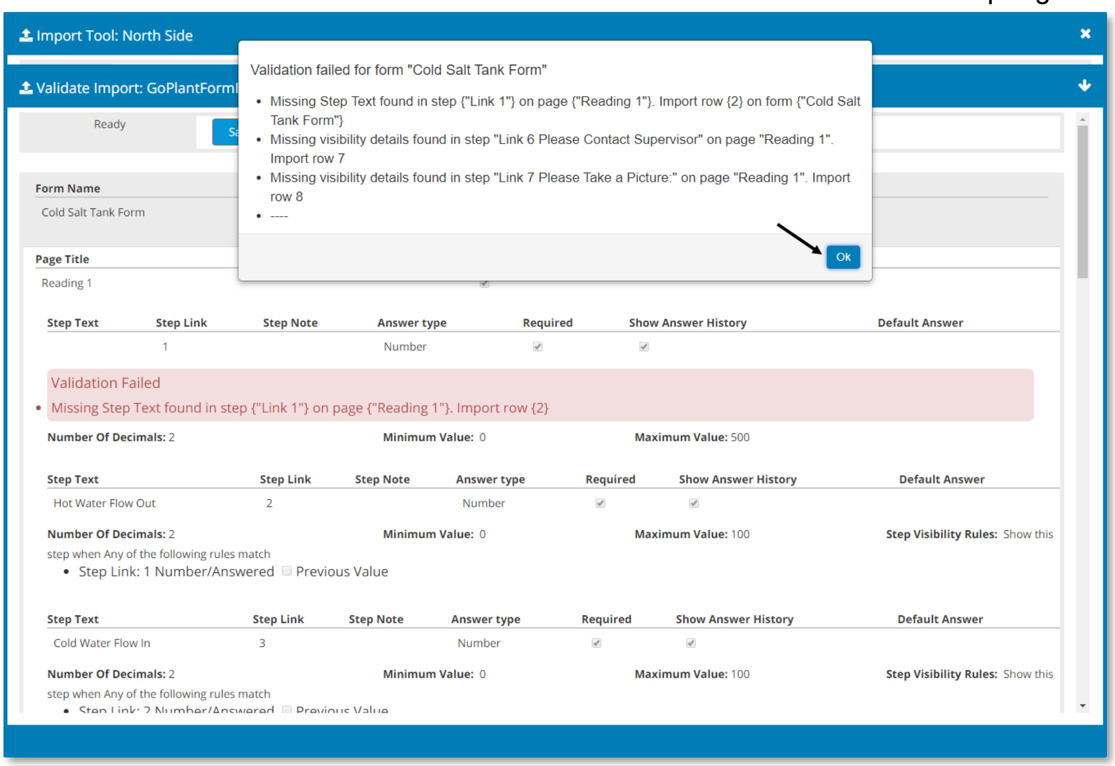


- The status "Saving" and "Saved" will be indicated.
  Note: The time it takes to save the form will depend on the number of steps added.
- To verify that the form was saved successfully, close the Import tool, the new Form must appear in the list of forms of the selected Storage Group.

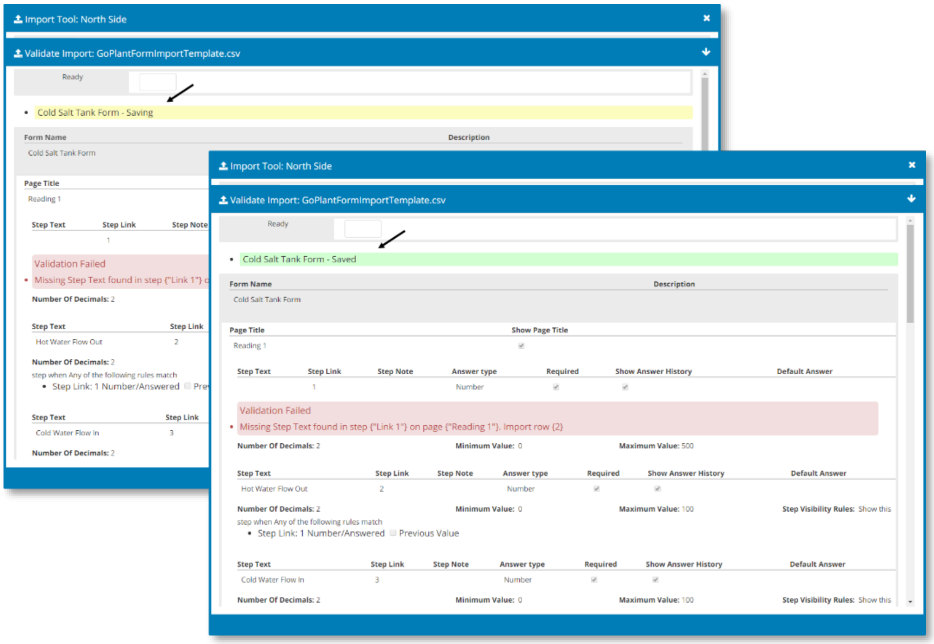


Note: The form must be published

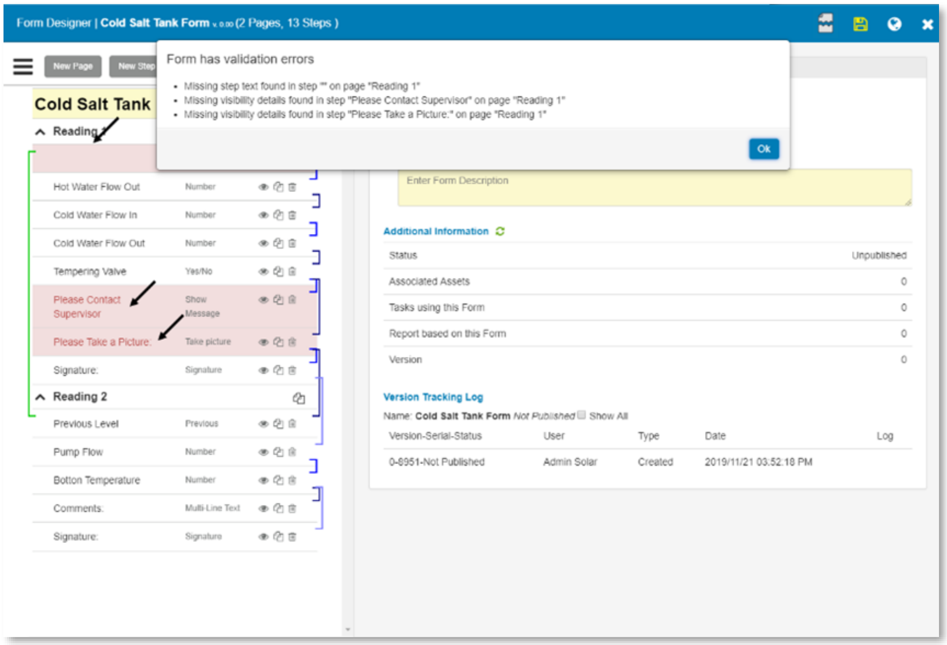
- If the csv file has validation problems, a pop-up window will appear indicating the errors found. Make a note or take a screenshot to remember all errors and fix them before attempting to import.



- 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.



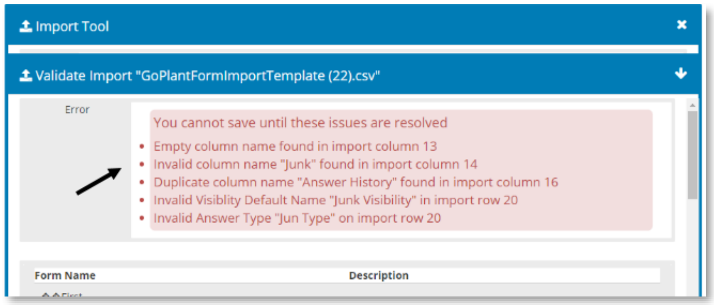
- The status "Saving" and "Saved" will be indicated.
  Note: The time it takes to save the form will depend on the number of steps added.
- To verify that the form was saved successfully, close the Import tool, the new Form will appear in the list of forms of the selected Storage Group.



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

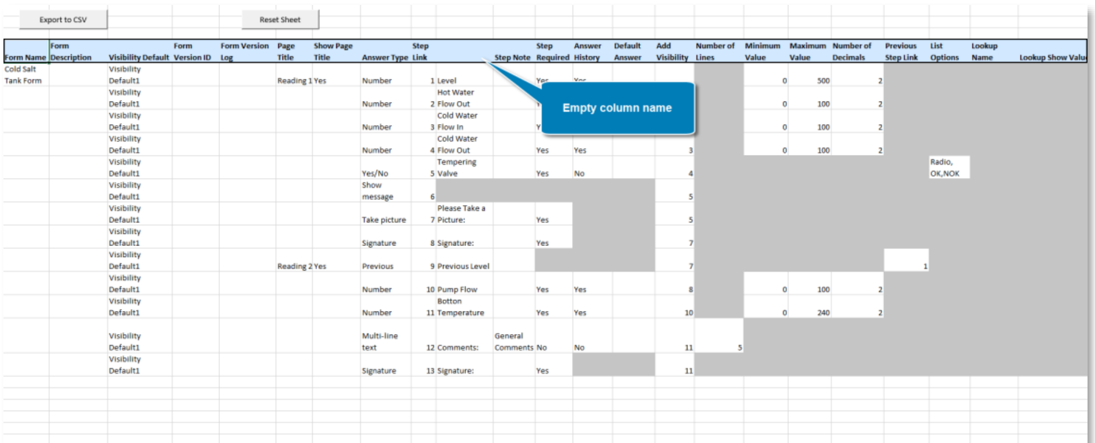
- **Critical Errors**

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.

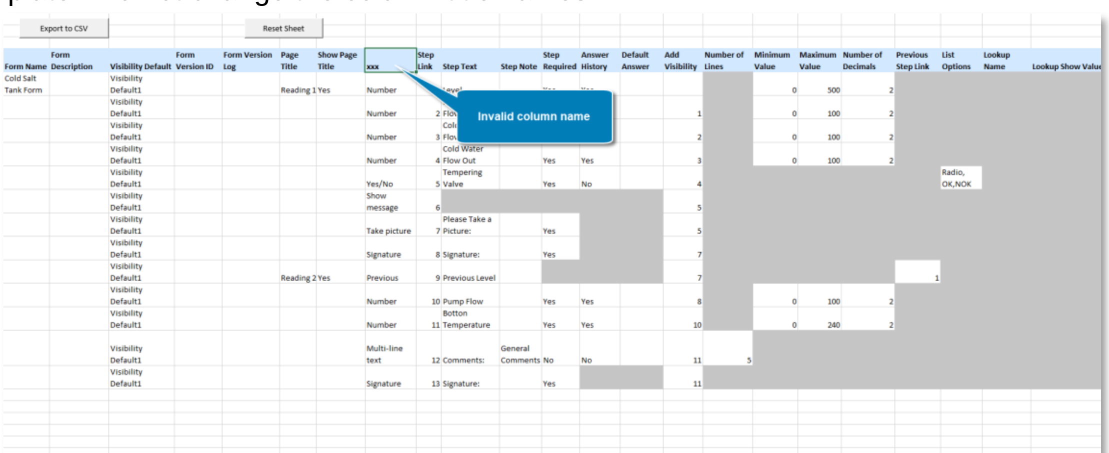


The possible critical errors that may appear in the validation process are listed below.

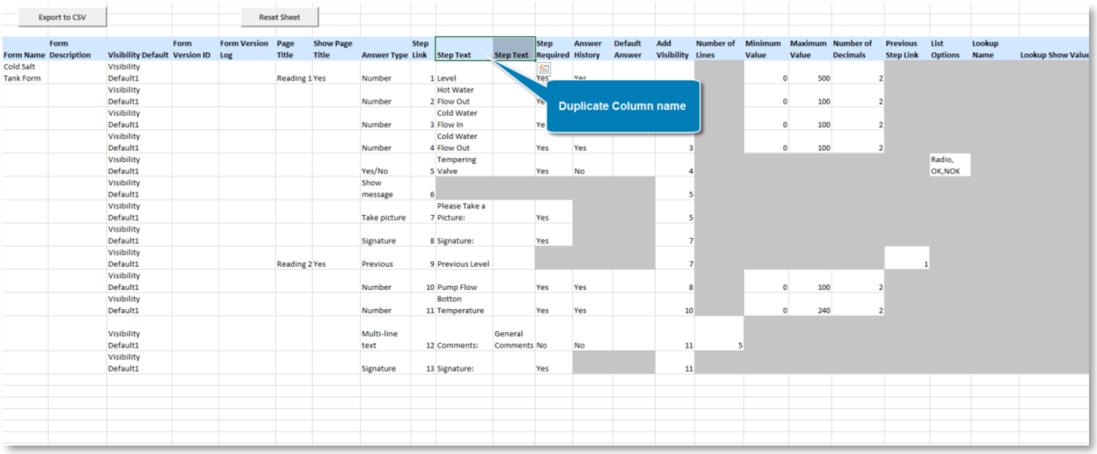
- **Empty column name –** The column name cannot be empty, and all column titles must match with the names shown in import columns in the import tool windows. All Column titles must remain in the English Language.



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

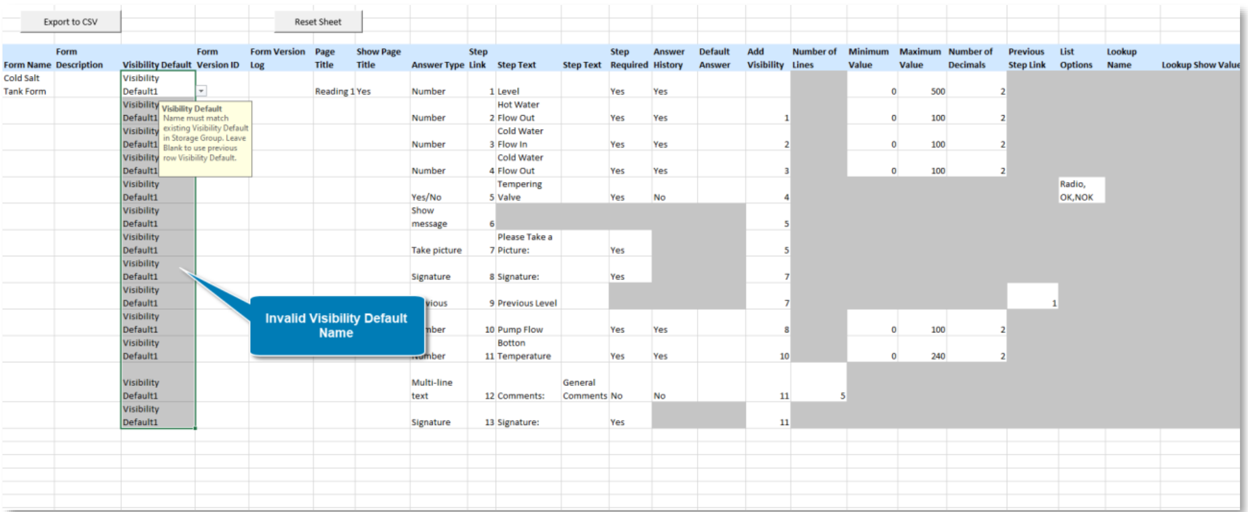


- **Duplicate Column name –** There cannot be duplicate names in column names.

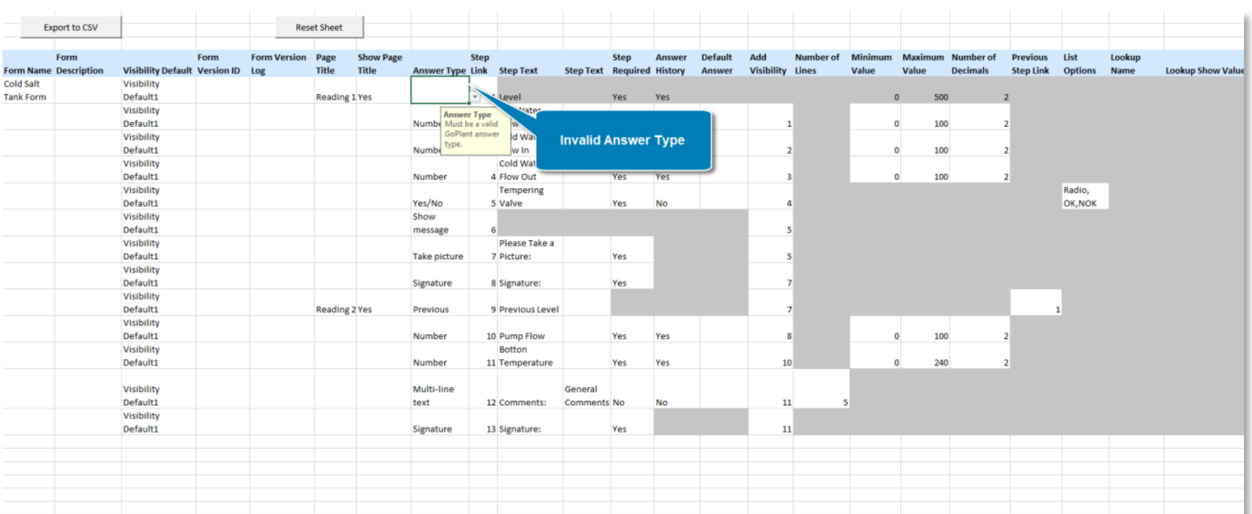


Valid Column Names		
Form Name	Answer History	Date Default
Form Description	Default Answer	Show Message
Visibility Default	Add Visibility	Document Name
Form Version ID	Number of Lines	Alias
Form Version Log	Minimum Value	Formula
Page Title	Maximum Value	Instruction Message
Show Page Title	Number of Decimals	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.



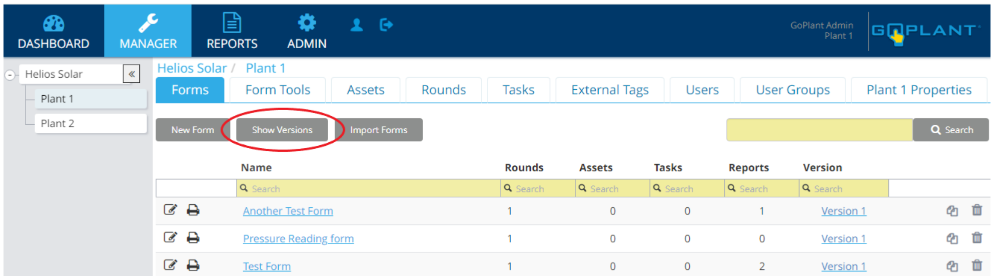
- **Invalid Answer Type –** The Response Type names must match with valid response types.



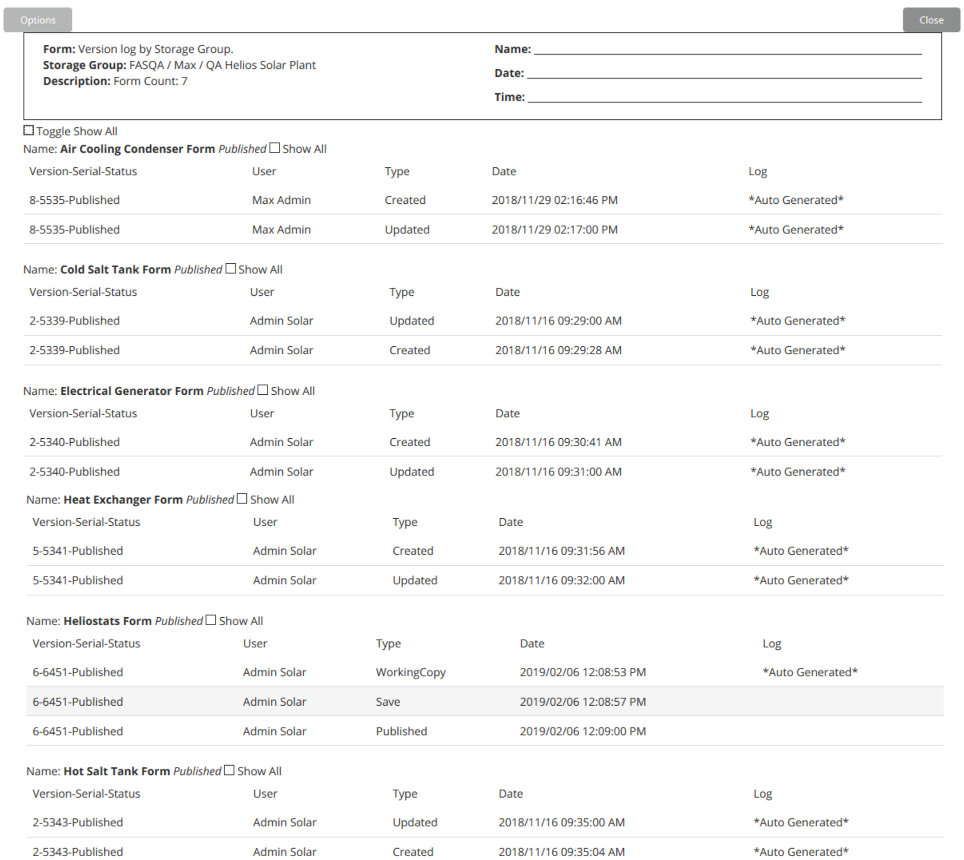
Valid Answer Types			
Short text	Show message	Time	Previous
Multi-line text	List	Date	Yes/No
Take picture	Signature	Scan Location	Instructions
Show document	Drawing	Lookup	
Number	Scan Code	Calculation	

Forms Tab view – Version Information

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



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


Options Close

Form: Version log by Storage Group.
Storage Group: FASQA / Max / QA Helios Solar Plant
Description: Form Count: 7

Name: ____
Date: ____
Time: ____

☐ Toggle Show All

Name: **Air Cooling Condenser Form** *Published* ☐ Show All

Version-Serial-Status	User	Type	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** *Published* ☐ Show All

Version-Serial-Status	User	Type	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 Form** *Published* ☐ Show All

Version-Serial-Status	User	Type	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** *Published* ☐ Show All

Version-Serial-Status	User	Type	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*

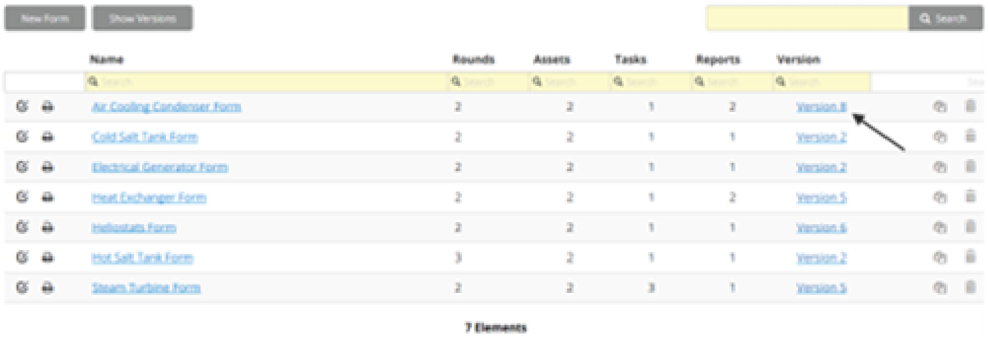
Name: **Heliostats Form** *Published* ☐ Show All

Version-Serial-Status	User	Type	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** *Published* ☐ Show All

Version-Serial-Status	User	Type	Date	Log
2-5343-Published	Admin Solar	Updated	2018/11/16 09:35:00 AM	*Auto Generated*
2-5343-Published	Admin Solar	Created	2018/11/16 09:35:04 AM	*Auto Generated*

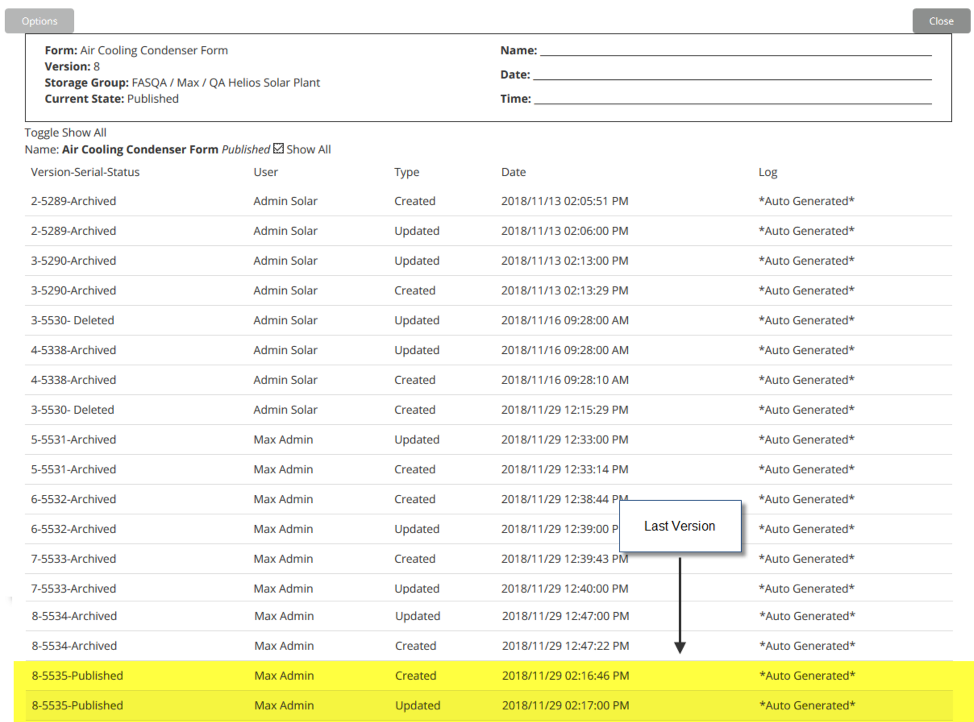
To see individual Forms, click on the Version # hyperlink:



Name	Rounds	Assets	Tasks	Reports	Version
Air Cooling Condenser Form	2	2	1	2	Version 8
Cold Salt Tank Form	2	2	1	1	Version 2
Electrical Generator Form	2	2	1	1	Version 2
Heat Exchanger Form	2	2	1	2	Version 5
Heliostats Form	2	2	1	1	Version 6
Hot Salt Tank Form	3	2	1	1	Version 2
Steam Turbine Form	2	2	3	1	Version 5

7 Elements

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



Form: Air Cooling Condenser Form
Version: 8
Storage Group: FASQA / Max / QA Helios Solar Plant
Current State: Published

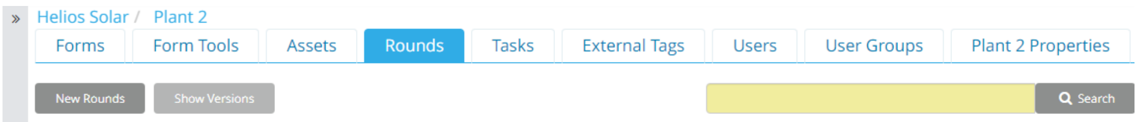
Name: ____
Date: ____
Time: ____

Toggle Show All
Name: **Air Cooling Condenser Form** *Published* ☑ Show All

Version-Serial-Status	User	Type	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	*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.



- 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.

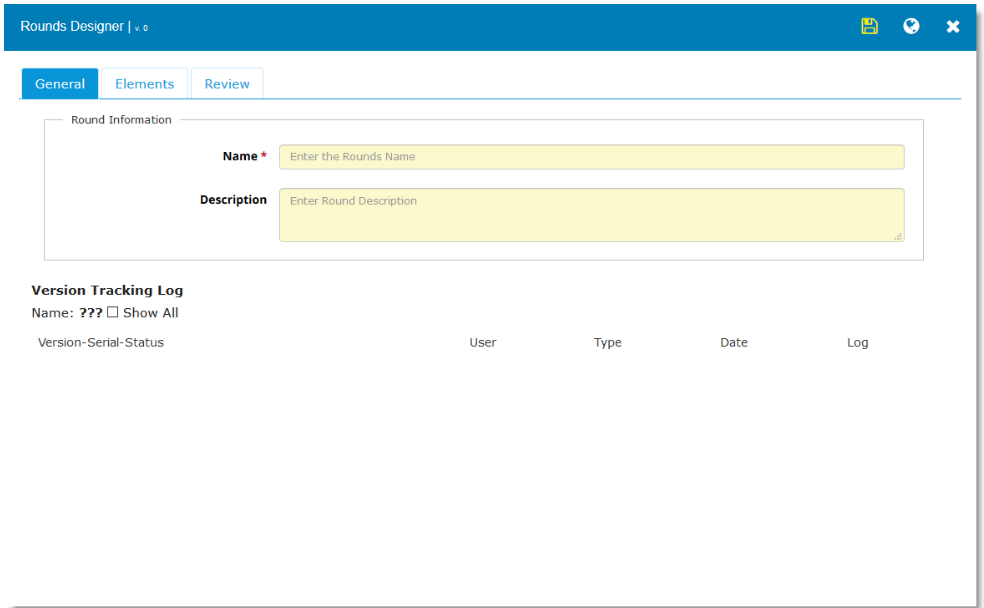
New Rounds | Show Versions | Search

Name	Forms	Assets	Tasks	Version
410 Building Route	2	11	0	Version 47
450 Building Route	0	14	0	Version 17
ALPHA Round	0	3	0	Version 1
Area 21 Route	0	3	0	Version 3
COVID-19 Facility Entrance Screening	1	0	0	Version 1
COVID-19 Screening	2	0	0	Version 3
ETC Demo Round	0	3	0	Version 1
Fire Extinguishers	0	3	0	Version 1
IP Orange PM 1	1	0	0	Version 1

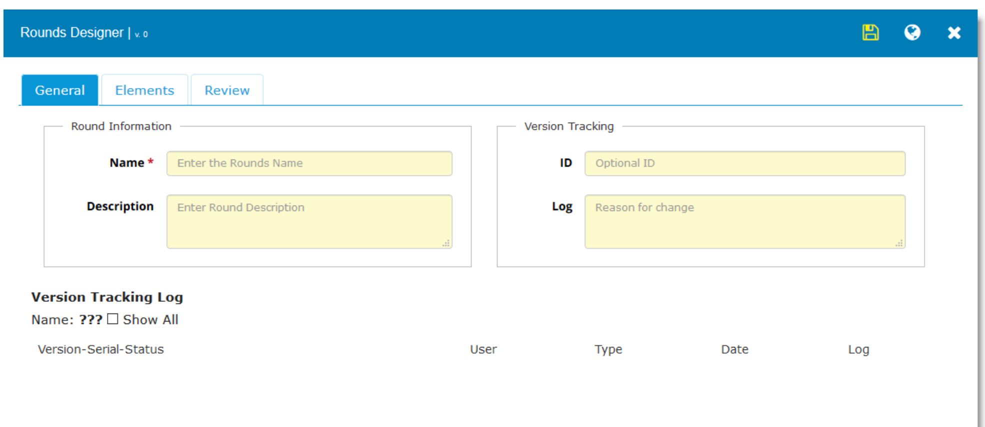
- Create a new Round by selecting the **New Rounds** button.

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

  The rounds designer window appears.

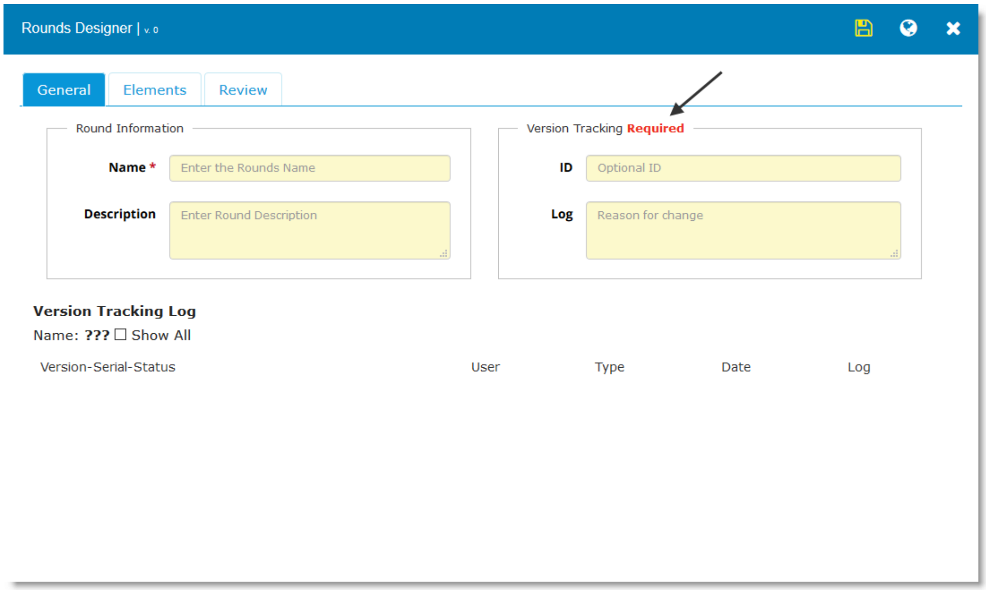


- Enter the Round name in **Name** (Required)**.**
- Enter the Round description in **Description.**
- When Version Tracking for Rounds is NOT enabled on the Storage Group, the Version Tracking Log is displayed on the tab. Only the latest version information is displayed unless the “Show All” checkbox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

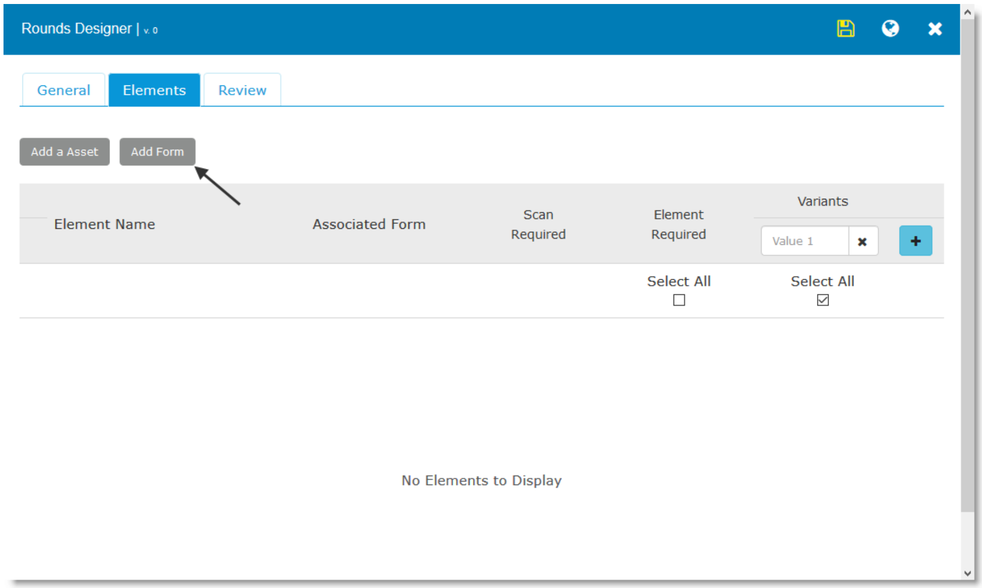


- Enter the Round name in **Name** (Required)**.**
- Enter the Round description in **Description.**
- Optional – Enter the Version Tracking Id
- Optional – Enter the Version Tracking Log Information.

- 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.

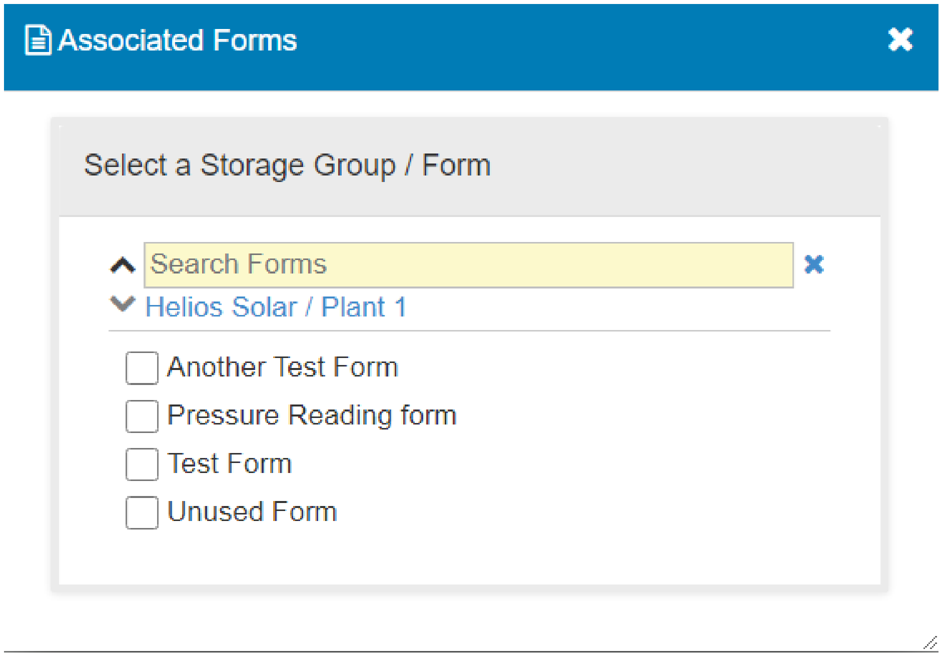


- Enter the Round name in **Name** (Required)**.**
- Enter the Round description in **Description.**
- Optional – Enter the Version Tracking Id.
- Enter the Version Tracking Log Information (Required).
- Select the **Elements** tab. The window to add your Assets and/or Forms to the Round appears. You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

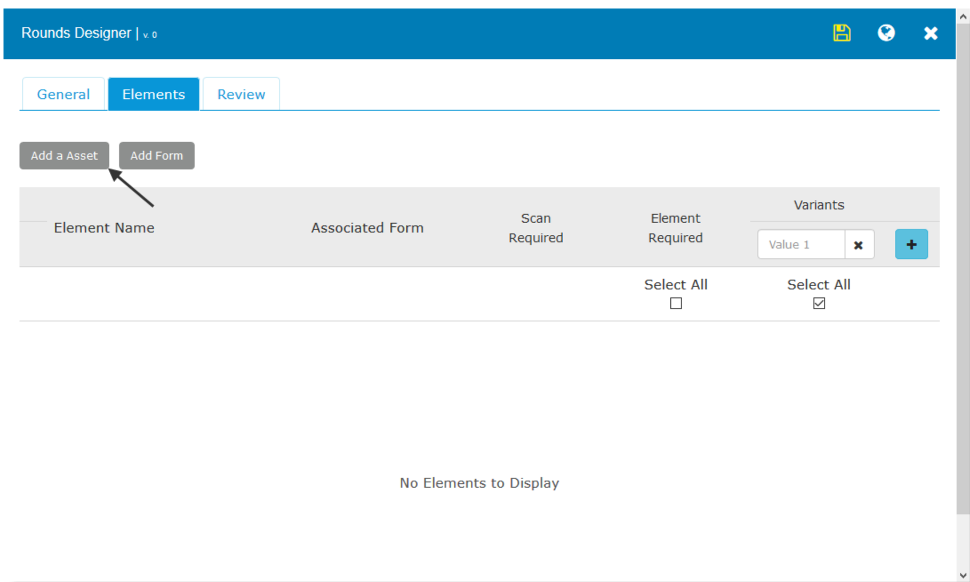


- Add Form elements to the round by selecting the **Add Form** button.

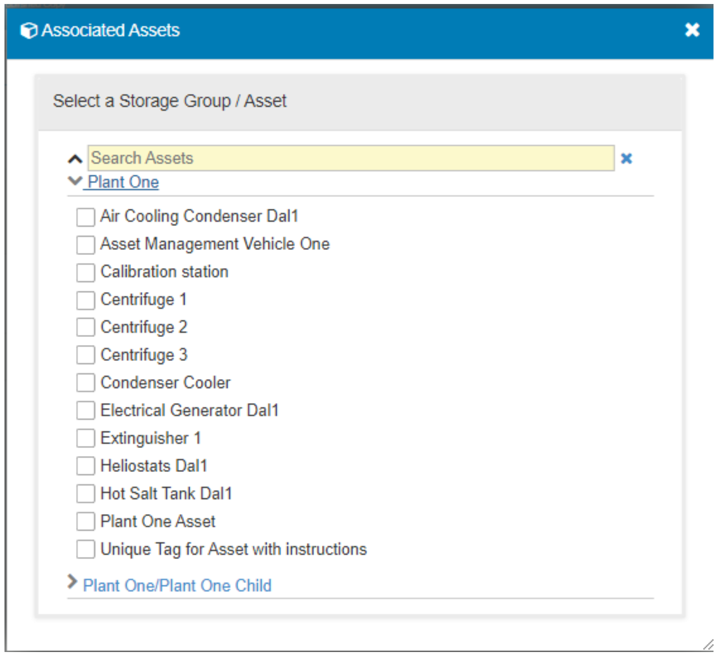
The window to add Form elements appears.



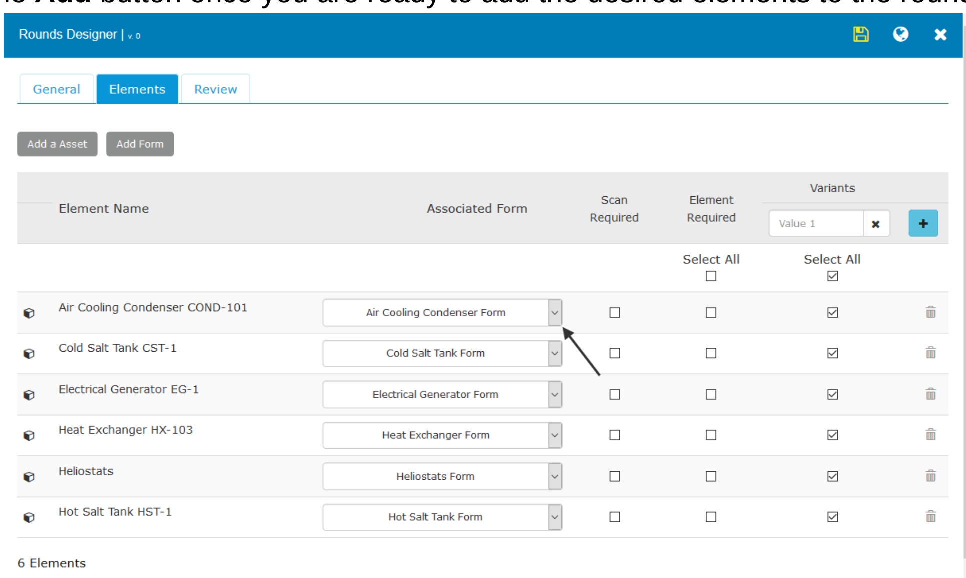
- Add forms by selecting the desired forms in the round and select the **Add** button.



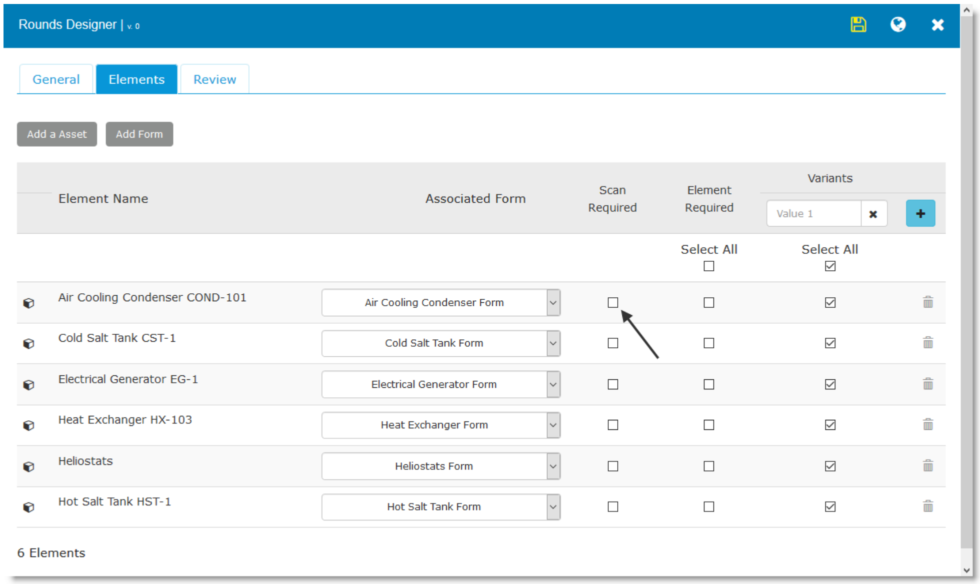
- Add Asset elements to the round by selecting the **Add Asset** button.



- 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.

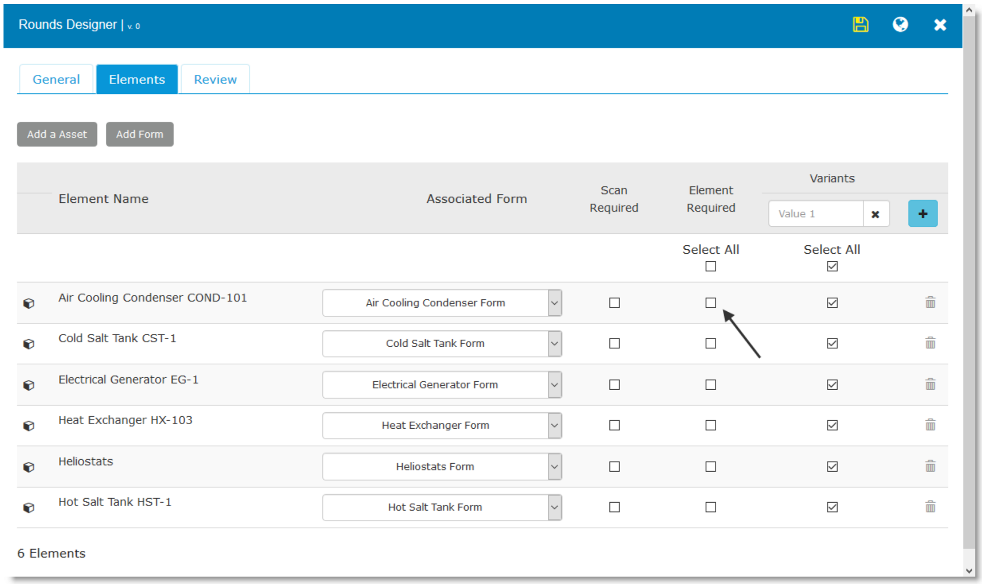


Note: For all Asset elements, select the proper associated form in the dropdown dialog.

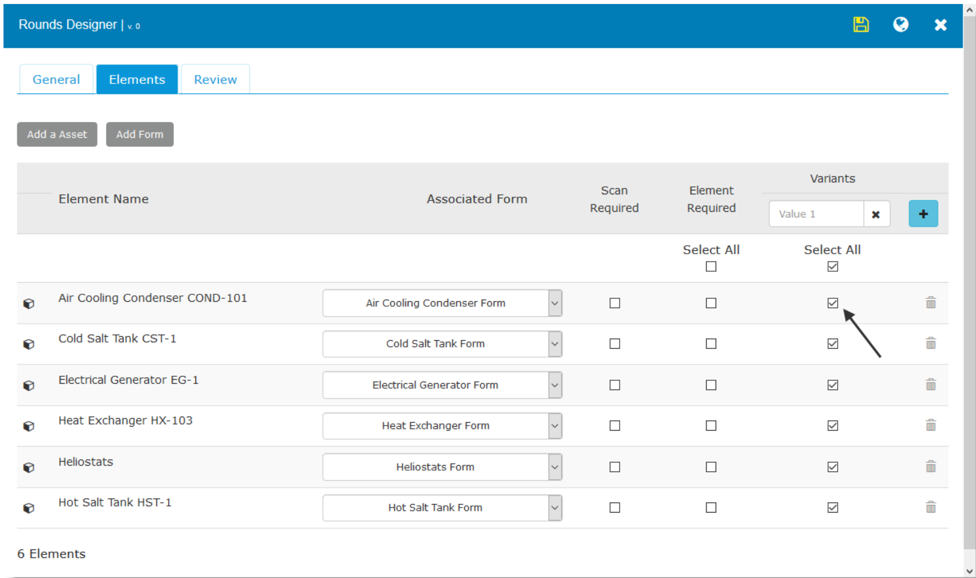


- Optional: Select "**Scan Required**" option next to all asset elements that require enforced scanning. The Scan Required column is not available for Form Only Elements in the Round.

Note: By requiring the operator to scan an asset's barcode, QR Code, or NFC/RFID Tag, the operator will only be allowed to collect data after a valid scan of that Asset is performed.

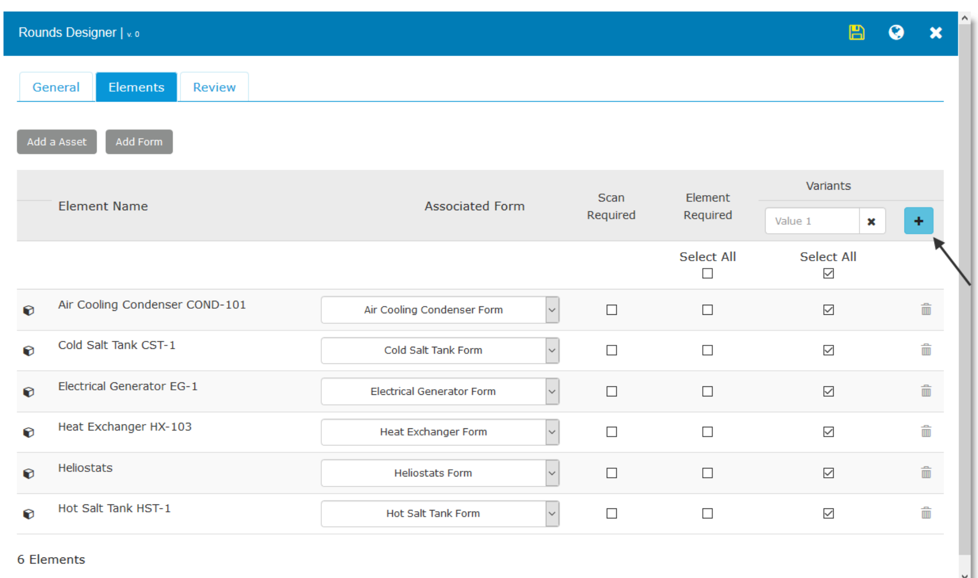


- Optional: Select "**Element Required.**" option that requires a completed the element before the Round can be completed. Elements that are required will force the operator to finish and commit the Round element before completing the entire Round.



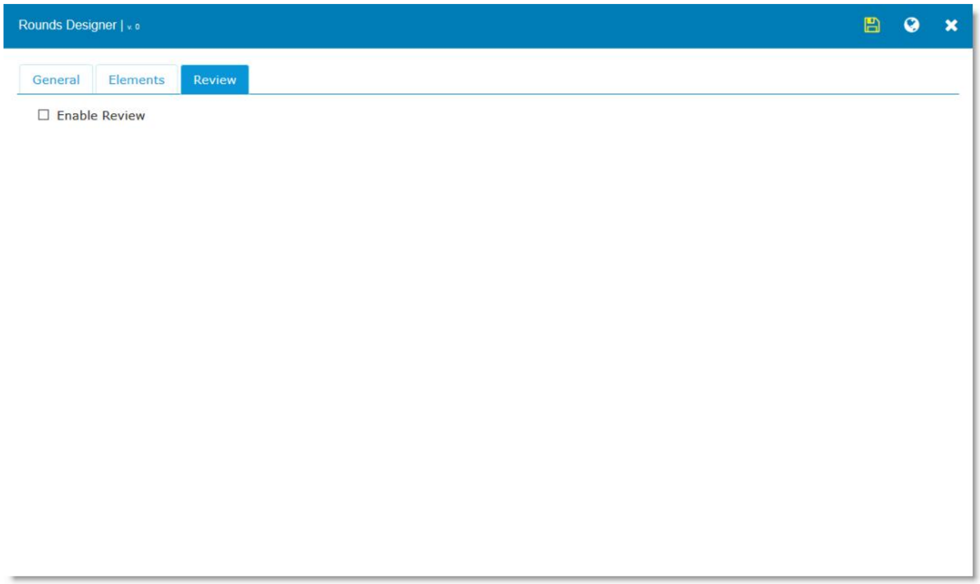
- Add the **Variant** name and select the elements desired for that variant. Variants define the Elements that are visible when the end user opens the Round on the device or website. The Variant allows a Round to have 4 different sets of Elements that display and are available for data entry.

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.



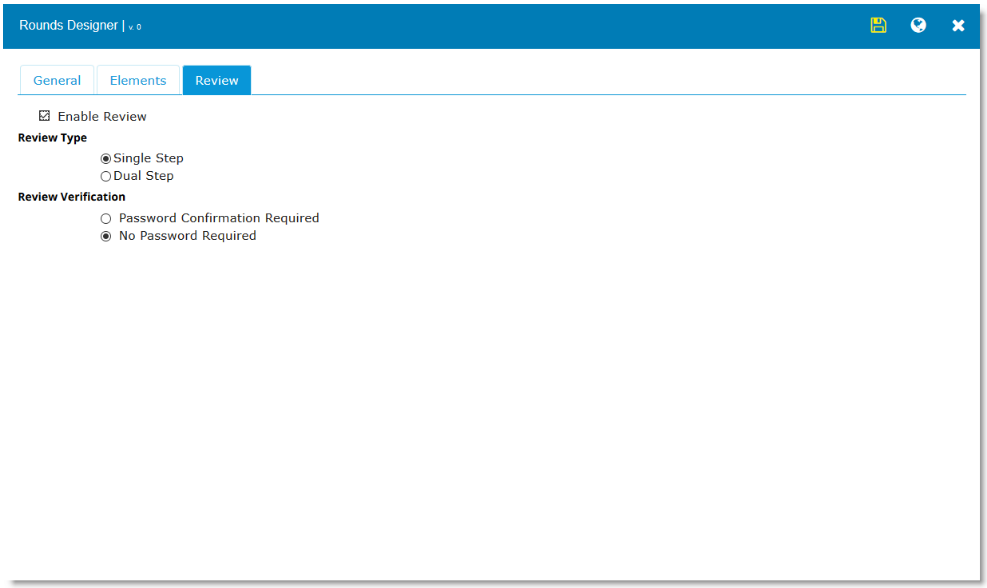
- Select the “**+**” button to add more variants to the round (maximum of 4).

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

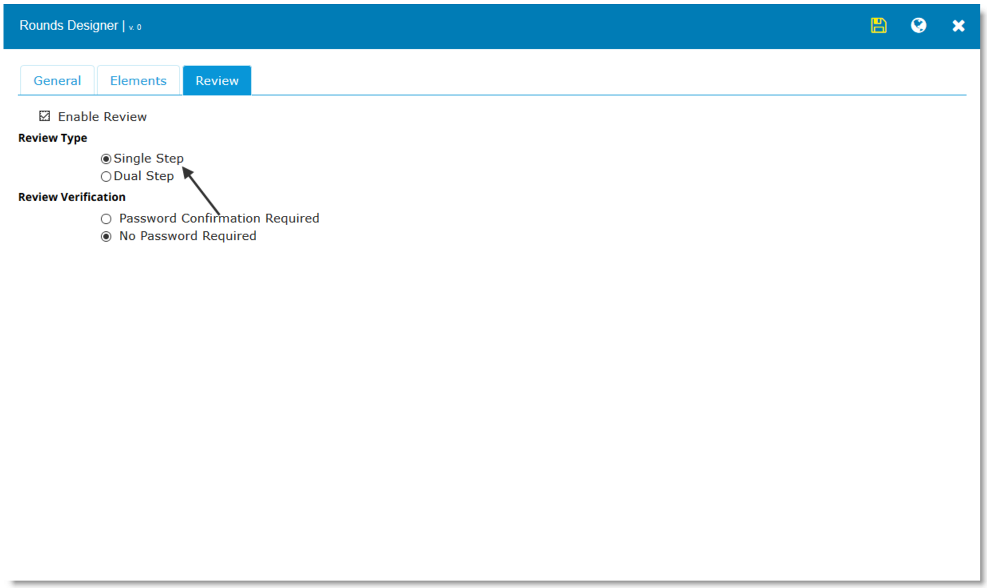


- Select the **Review** tab.   The window to enable round review appears.

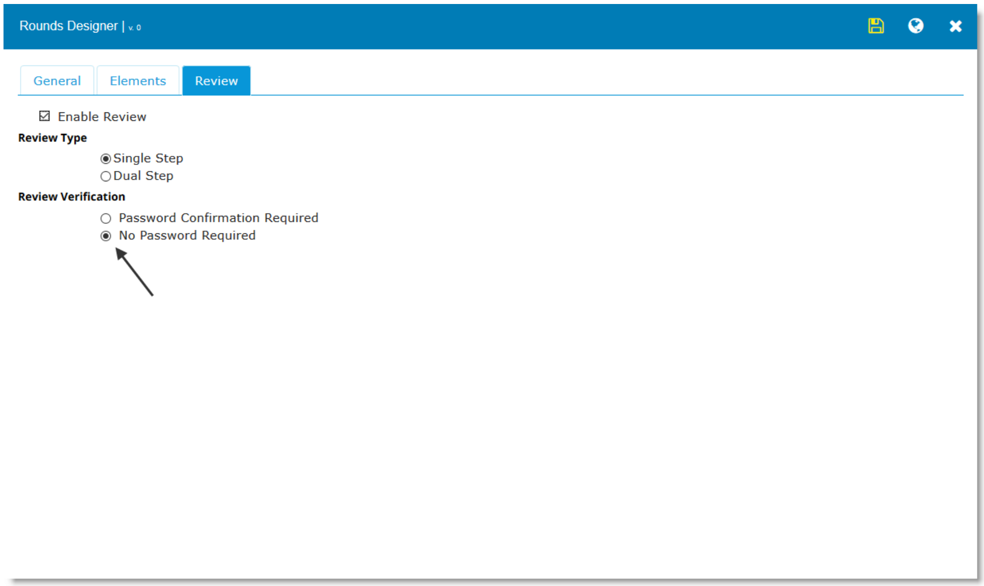
  Note: Rounds can have either a single or dual review enabled for each round.
- Select the **Enable Review** option to define the review type and verification required.



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.

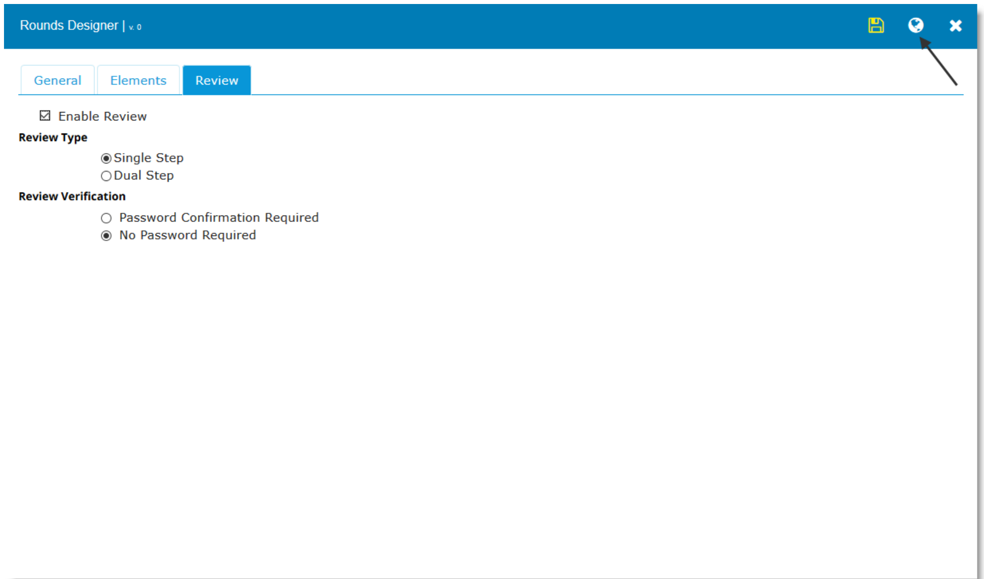


- Select the Review Type.



- 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.

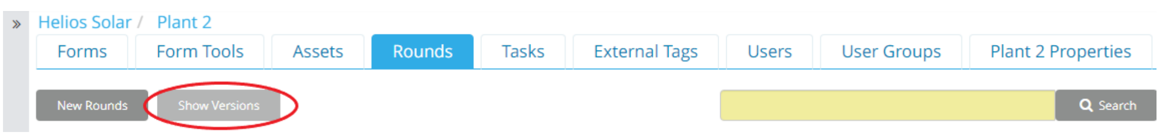


- Save and publish the Round.

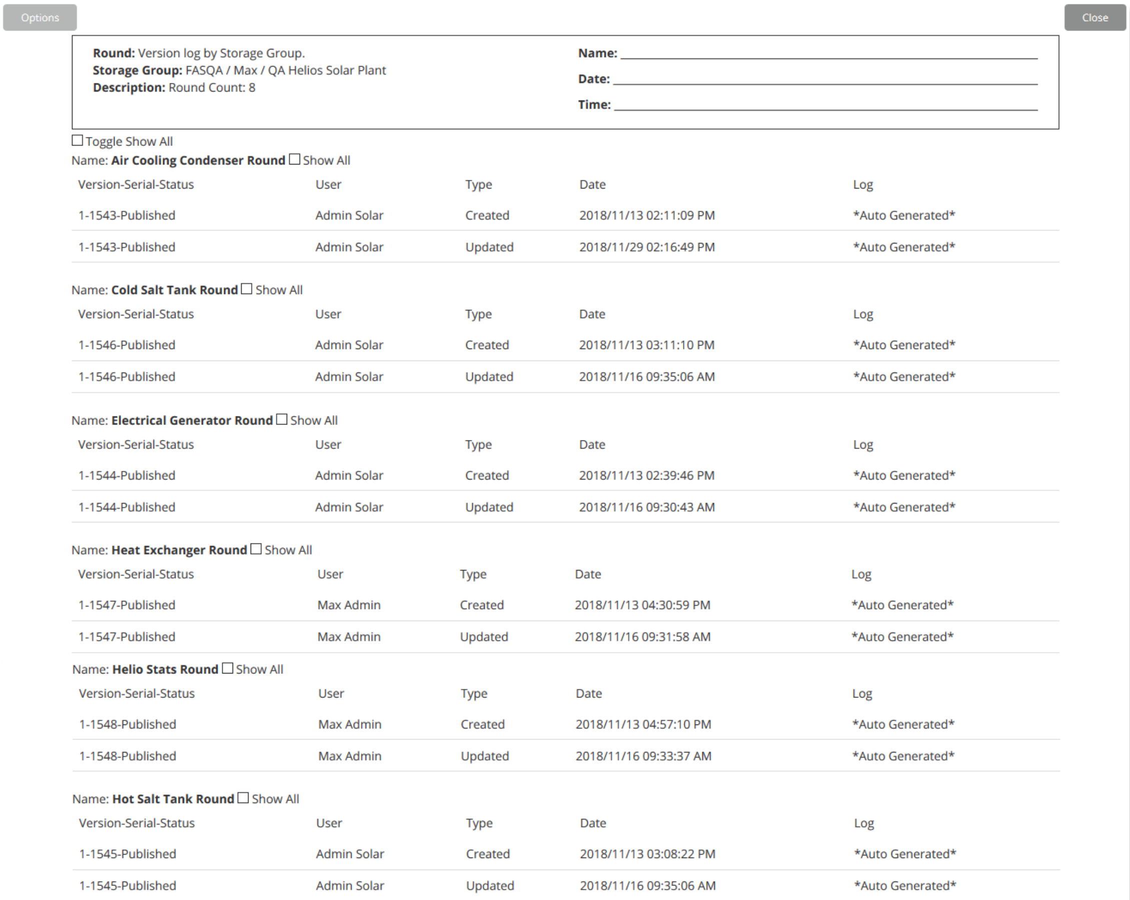
Note: Once a round is published it will be available to all users that have access through the storage groups.

- 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.



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



Options Close

Round: Version log by Storage Group.
Storage Group: FASQA / Max / QA Helios Solar Plant
Description: Round Count: 8

Name: ______
Date: ______
Time: ______

☐ Toggle Show All

Name: **Air Cooling Condenser Round** ☐ Show All

Version-Serial-Status	User	Type	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	Type	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 Round** ☐ Show All

Version-Serial-Status	User	Type	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	Type	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*

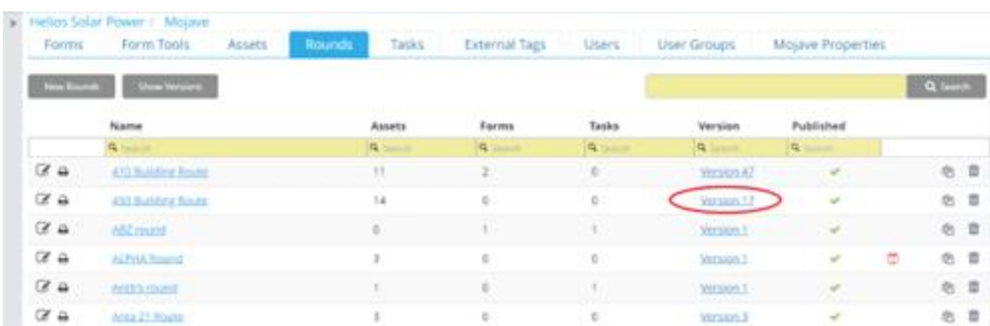
Name: **Helio Stats Round** ☐ Show All

Version-Serial-Status	User	Type	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*

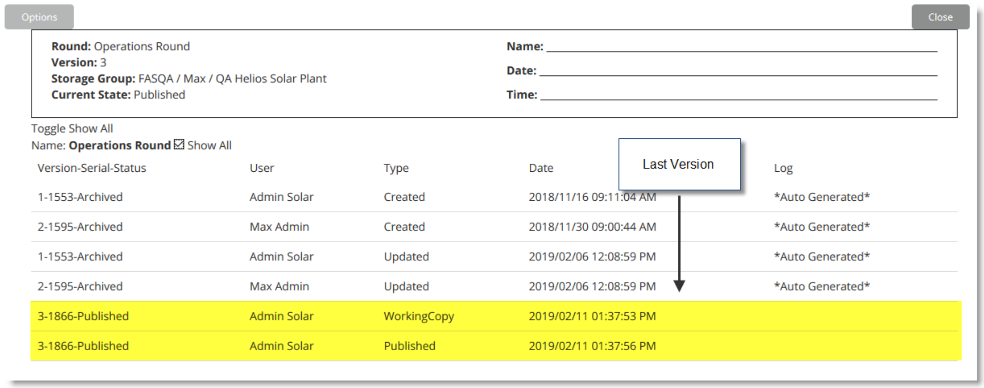
Name: **Hot Salt Tank Round** ☐ Show All

Version-Serial-Status	User	Type	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.



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



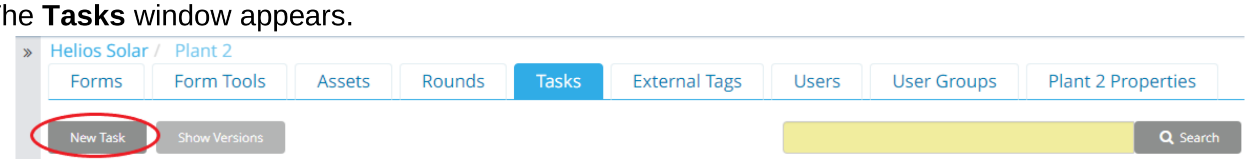
Creating and Scheduling Tasks *[Admin, Editor]*

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 one or more Round Variants. Tasks are created by first choosing a start time, an end time, and an 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.

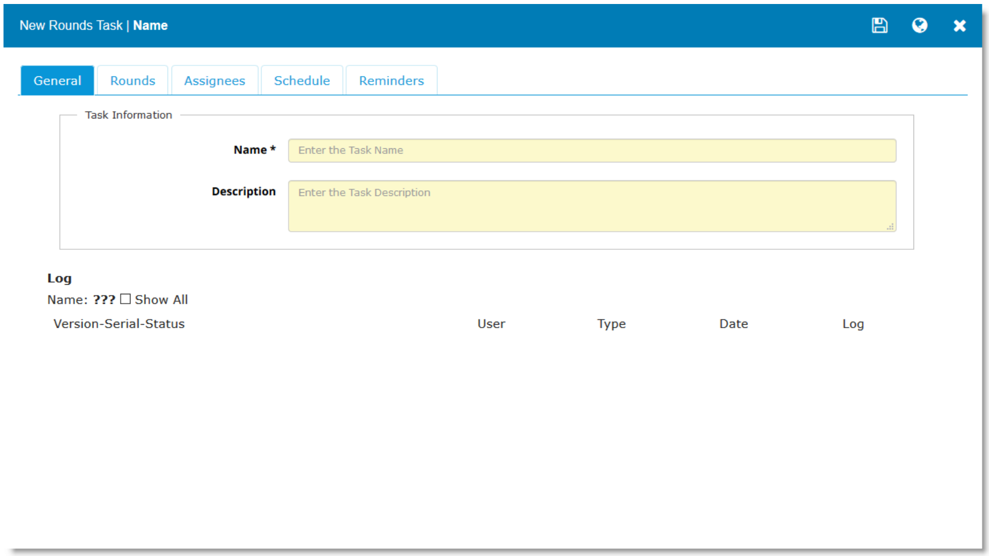
- Select the **Tasks** Tab.

The **Tasks** window appears.

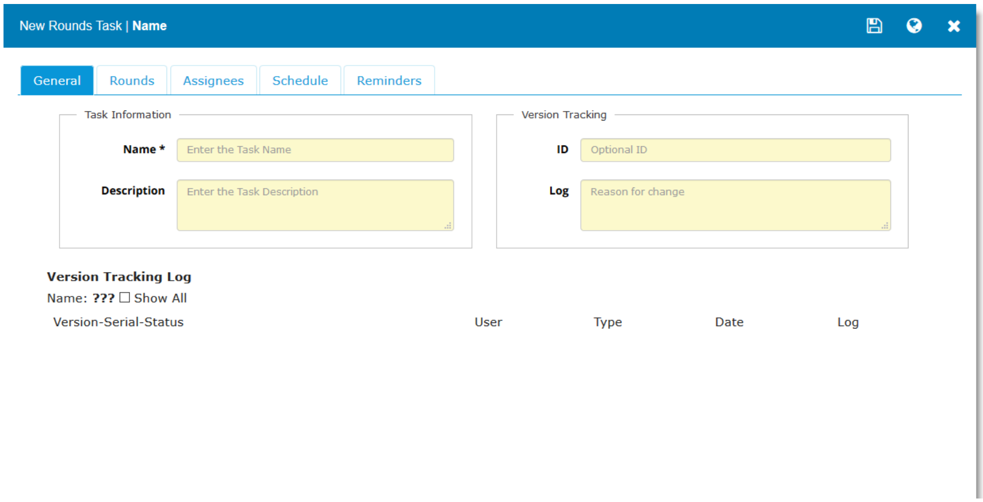


- Create a new task by selecting **New Task**. The **New Task** window appears.

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.

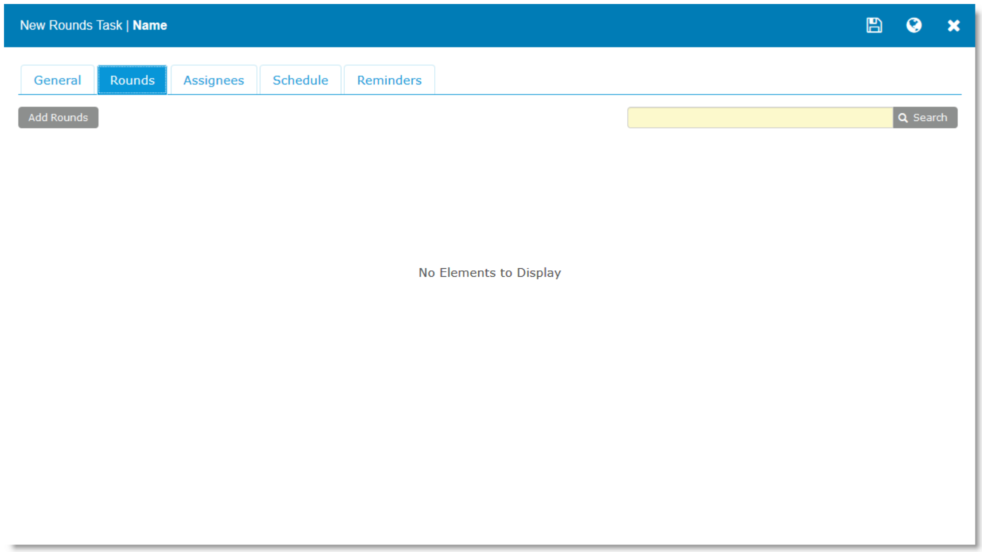


- Enter the task name in **Name** (Required).
- Enter the task description in **Description**.
- When Version Tracking for Tasks is not enabled on the Storage Group, the Version Tracking Log is displayed on the tab. Only the latest version information is displayed unless the "Show All" checkbox is selected.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

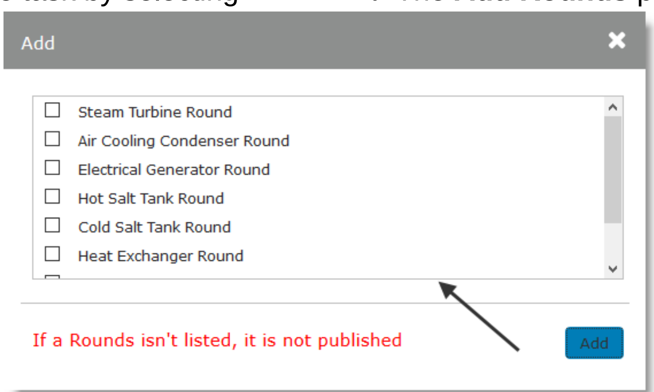


- In this case you may also enter the Version Tracking ID and Log information.

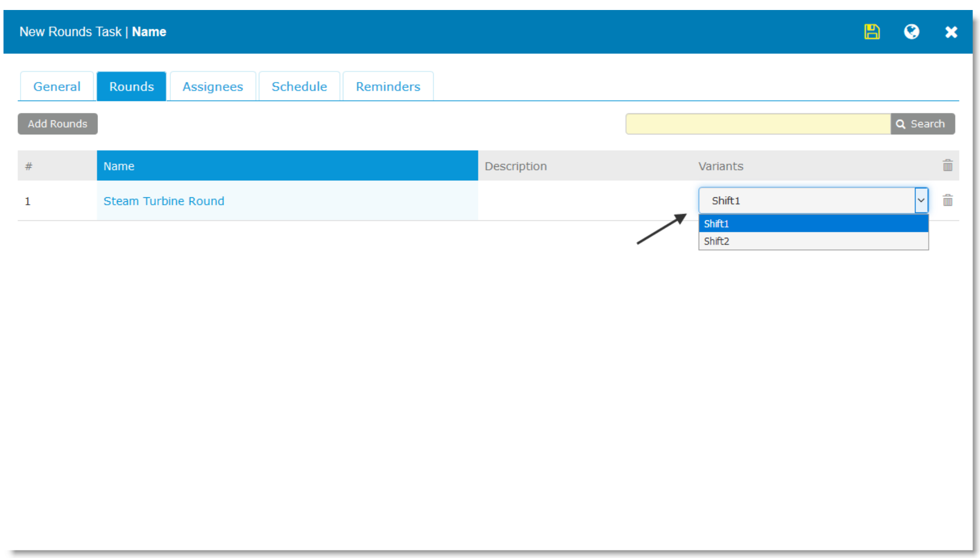
- Select the **Rounds** tab (name of tab may differ depending on site admin's definition). The window to add your rounds to the task appears.



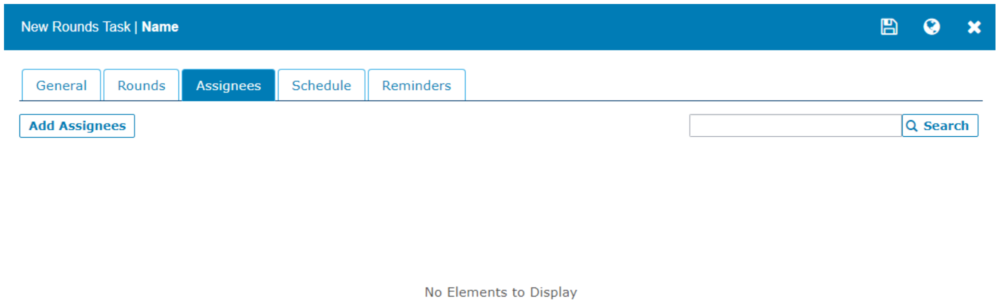
- Add the rounds to the task by selecting Add Rounds. The **Add Rounds** page appears.



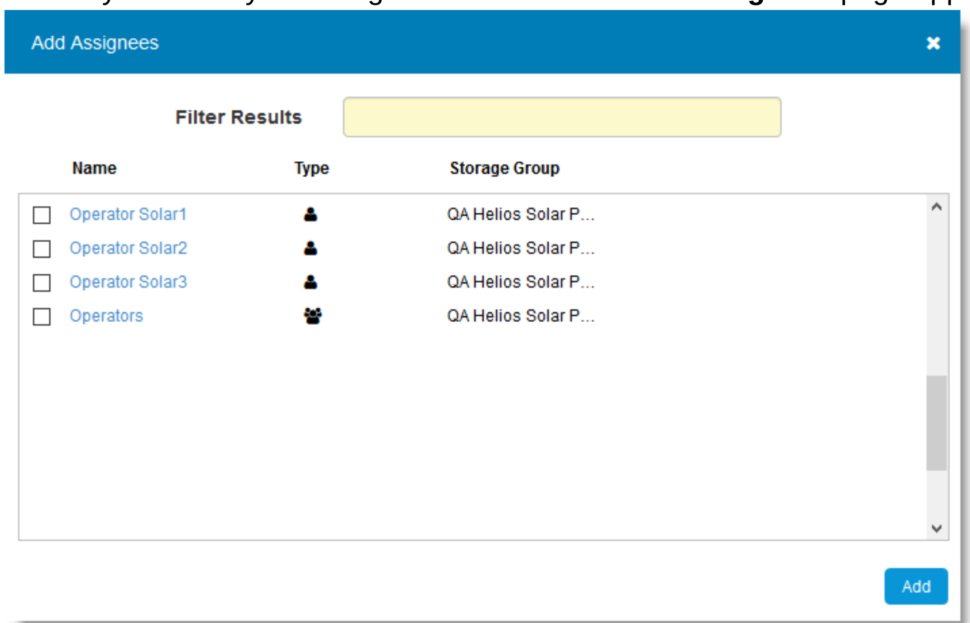
- Select the rounds you want to add to your task. *Note: A specific round can only be added once.*



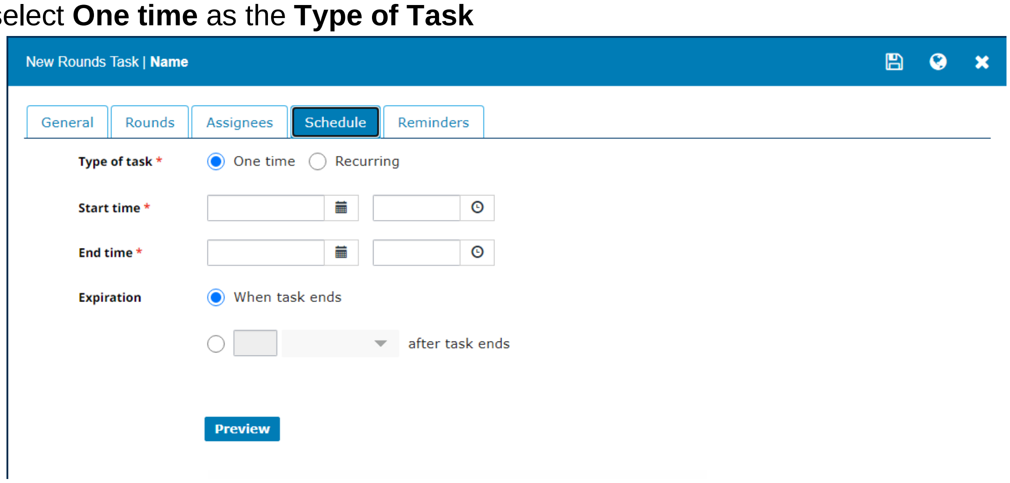
- Select the variant you want to add to your task.
- Select the **Assignees** tab. The window to add your assignees to your task appears.



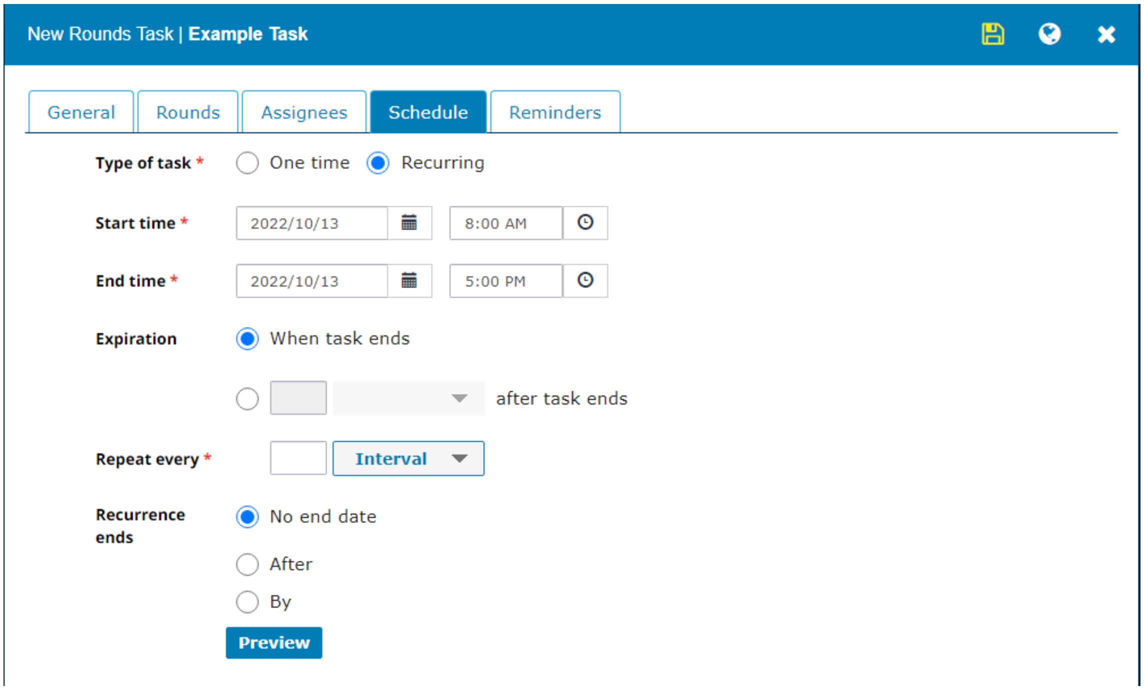
- Add assignees to your task by selecting Add Assignees. The **Add Assignees** page appears.



- 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**

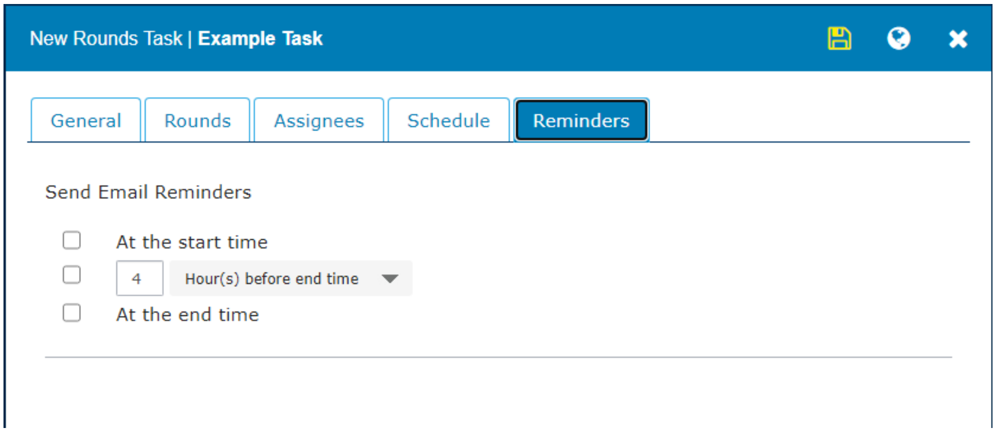


- Enter the task start and end times. Remember all times reflect the time zone of the currently selected storage group. The start time and end time must be in the future for the task to publish.
  Note: The task will not appear on the website or mobile device until the start time has been reached.
- 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**



- 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 

 at the bottom of the page.
- Optionally, remind the assignees by selecting the **Reminders** tab and scheduling email notification to be sent.



- Press the save icon to save your changes. It will turn yellow if changes have been made.
- Publish the task by selecting . 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.

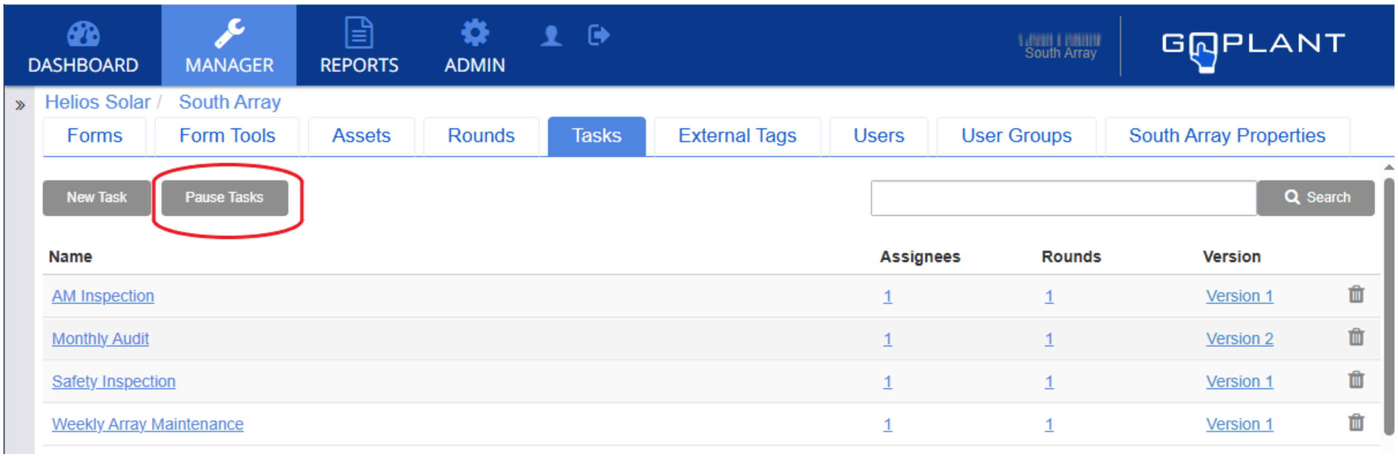
When republishing Tasks, only existing Tasks that have NOT started will be updated. Any Task already created by the system where the start time has passed will NOT get modified with any changes. Mobile devices will continue to show the previous version of any Task where the start time has passed. GoPlant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

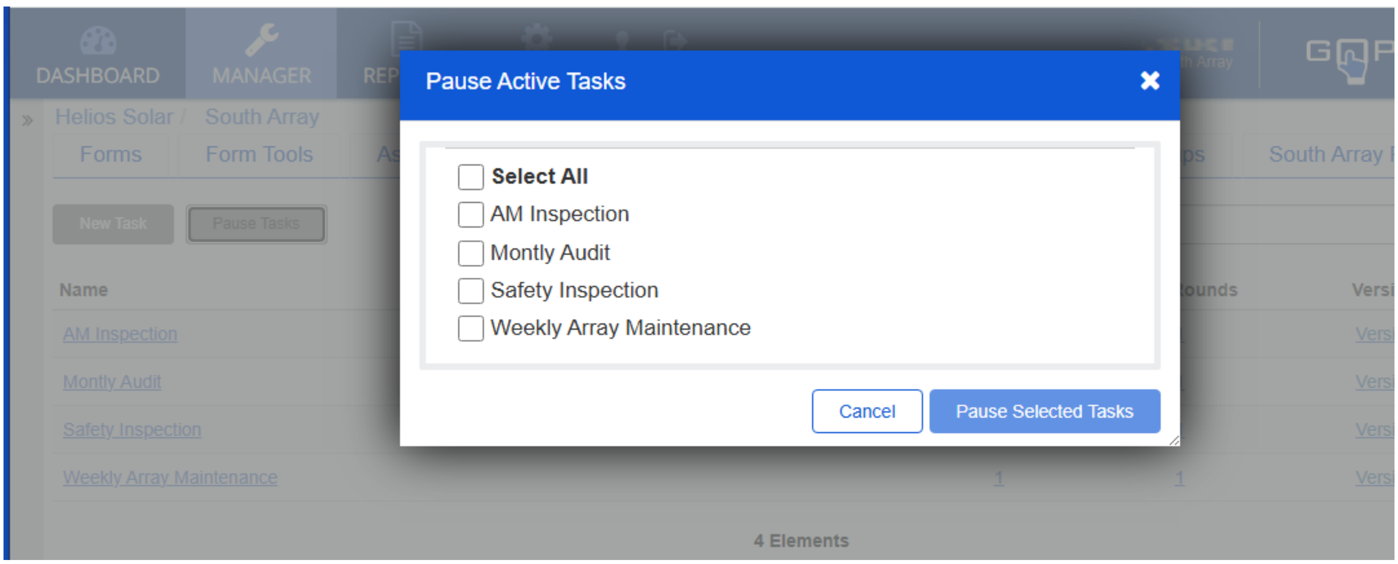
- **Pausing and Resuming Tasks**

A GoPlant Task may be paused and then later resumed. Pausing a task prevents future instances of the task from being scheduled until the task is resumed.

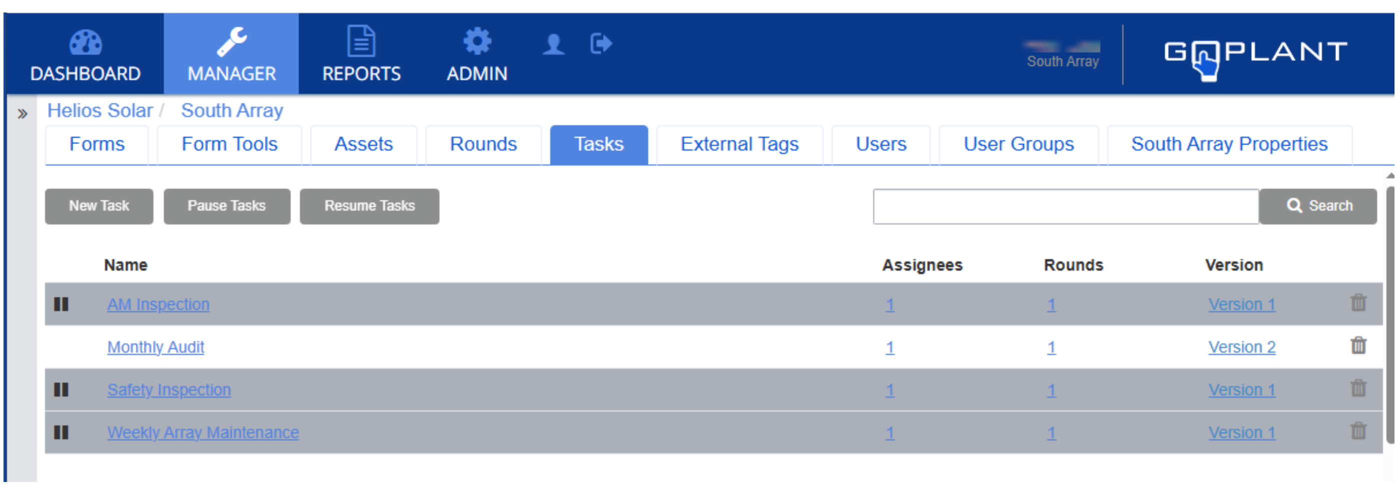
To pause tasks in GoPlant, navigate to the tasks panel, if there are active tasks in the currently selected storage group, a Pause Tasks button will be displayed.



Clicking the button opens the pause tasks dialog. Use the dialog to select the tasks to pause and click through the confirmation dialog.

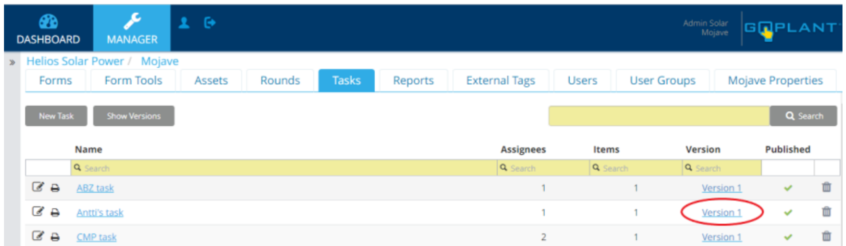


Paused tasks are shown in the task panel with a pause icon highlighted in grey. To resume a paused task, click on the Resume Tasks button and select the tasks to resume.

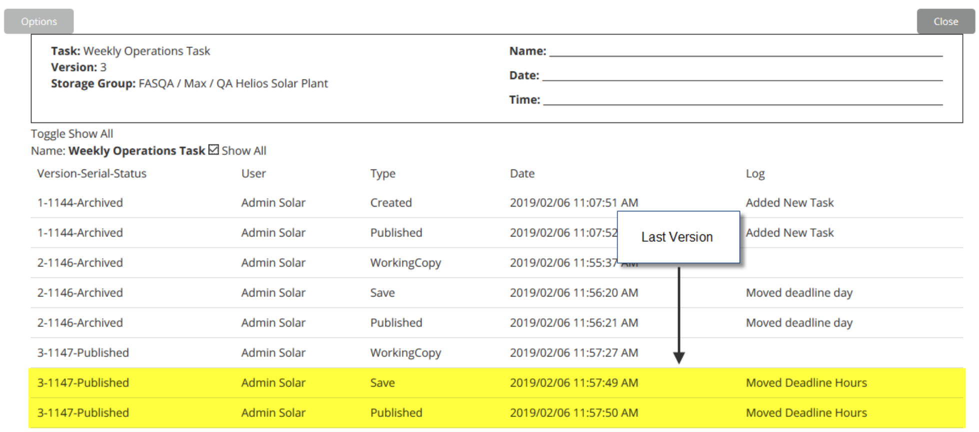


- Tasks Tab – Version Tracking

To see the version history for an individual Task, click on the blue version # hyperlink of the Task.



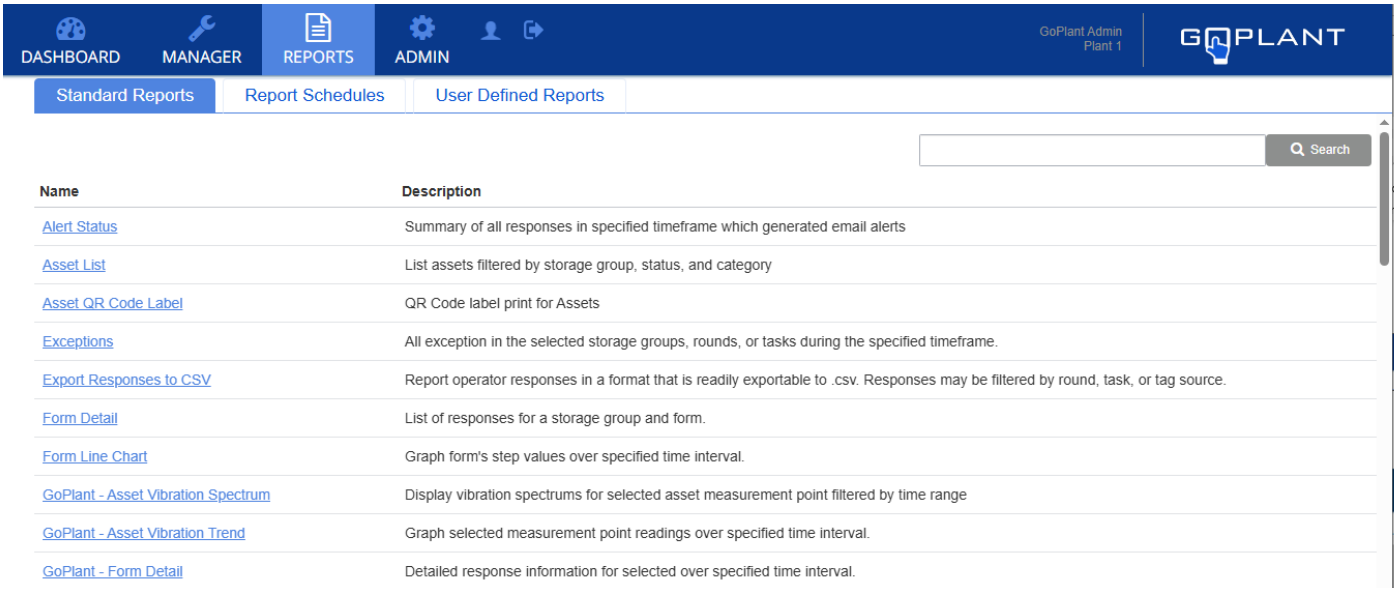
The Version Tracking print version of the selected Task is displayed.



Running Standard Reports [Reporters]

GoPlant provides several standard 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.

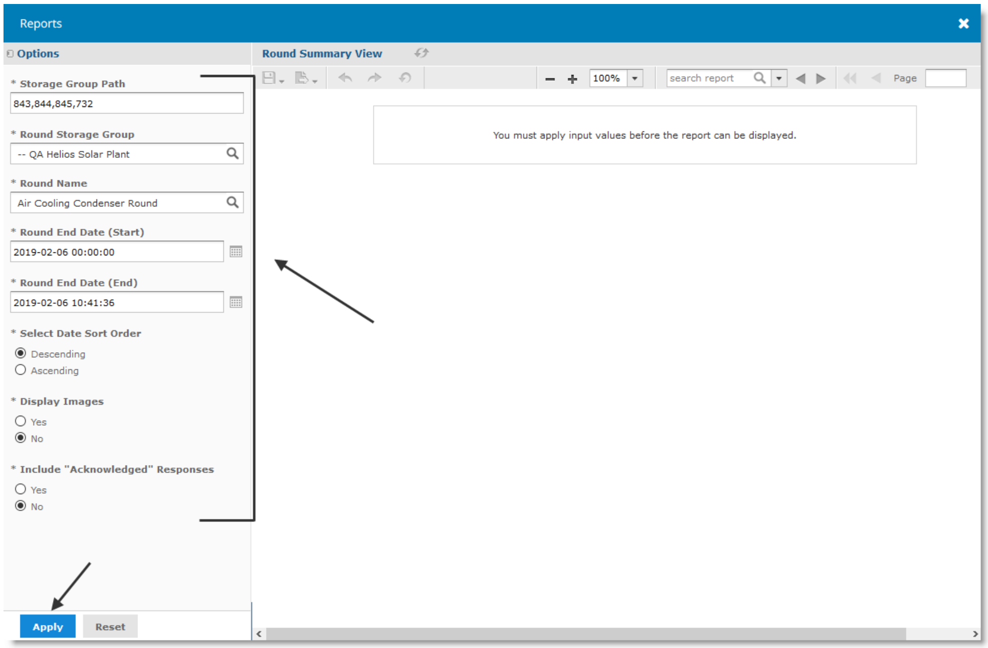
The standard reports tab lists all the preconfigured reports available in GoPlant as well as a description of each report.



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

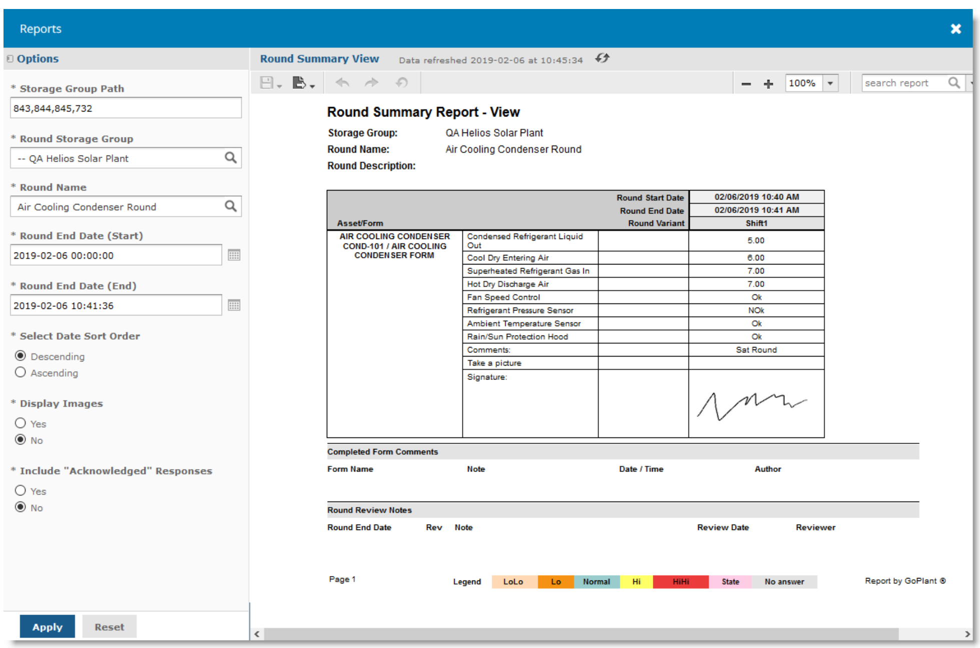
To run a standard report, click on the report name and then follow these steps:

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

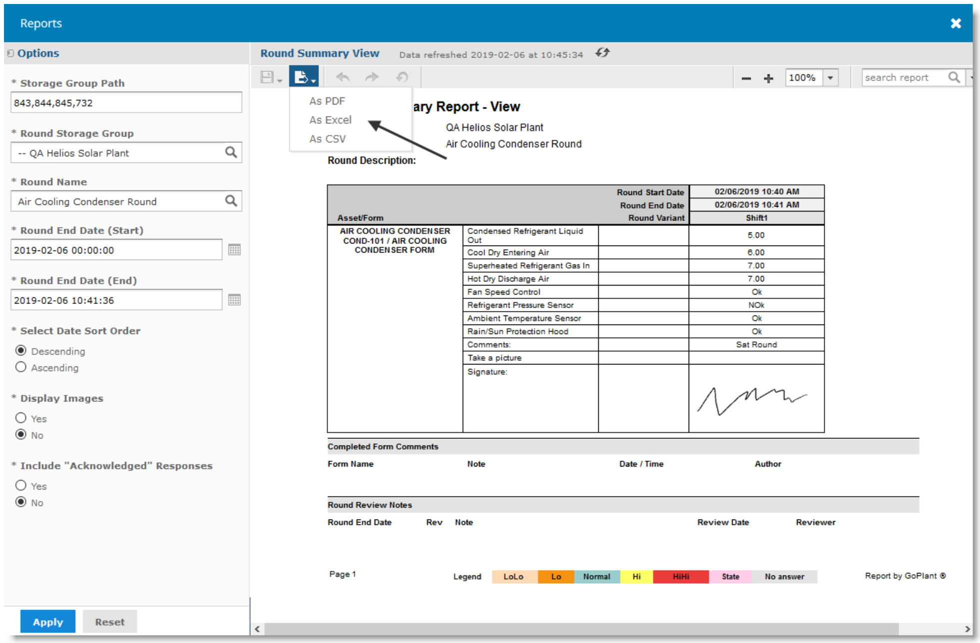


- Select **Apply**.

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



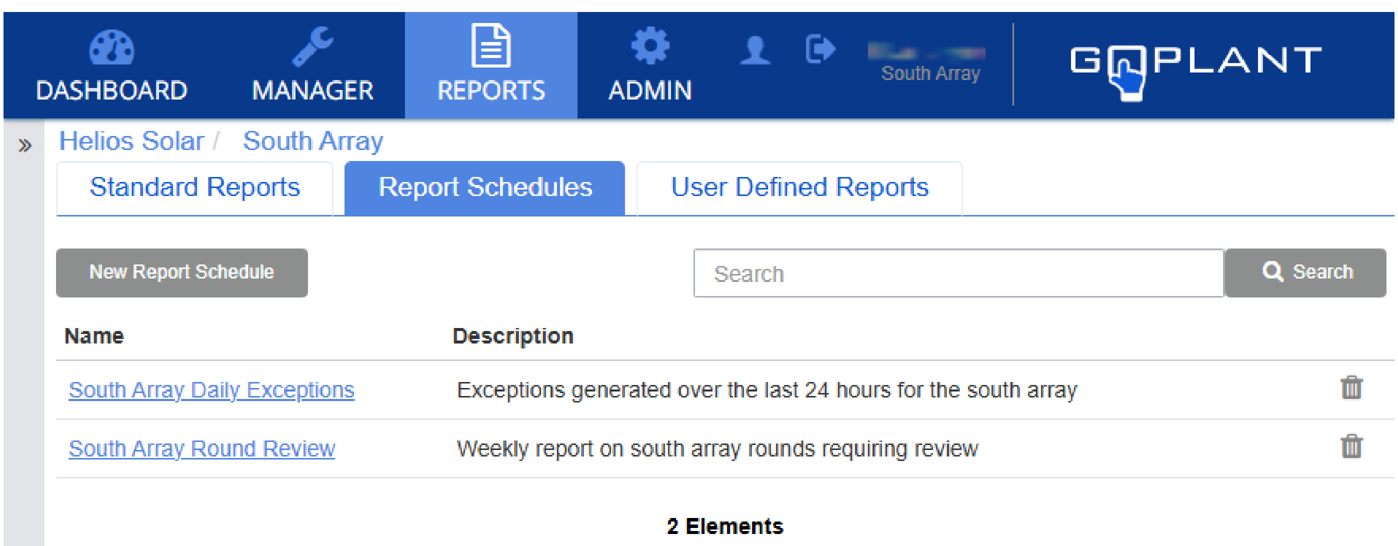
- Reports formatted for printing, can be exported to CVS, Excel, PDF, formats by selecting the export in the view.



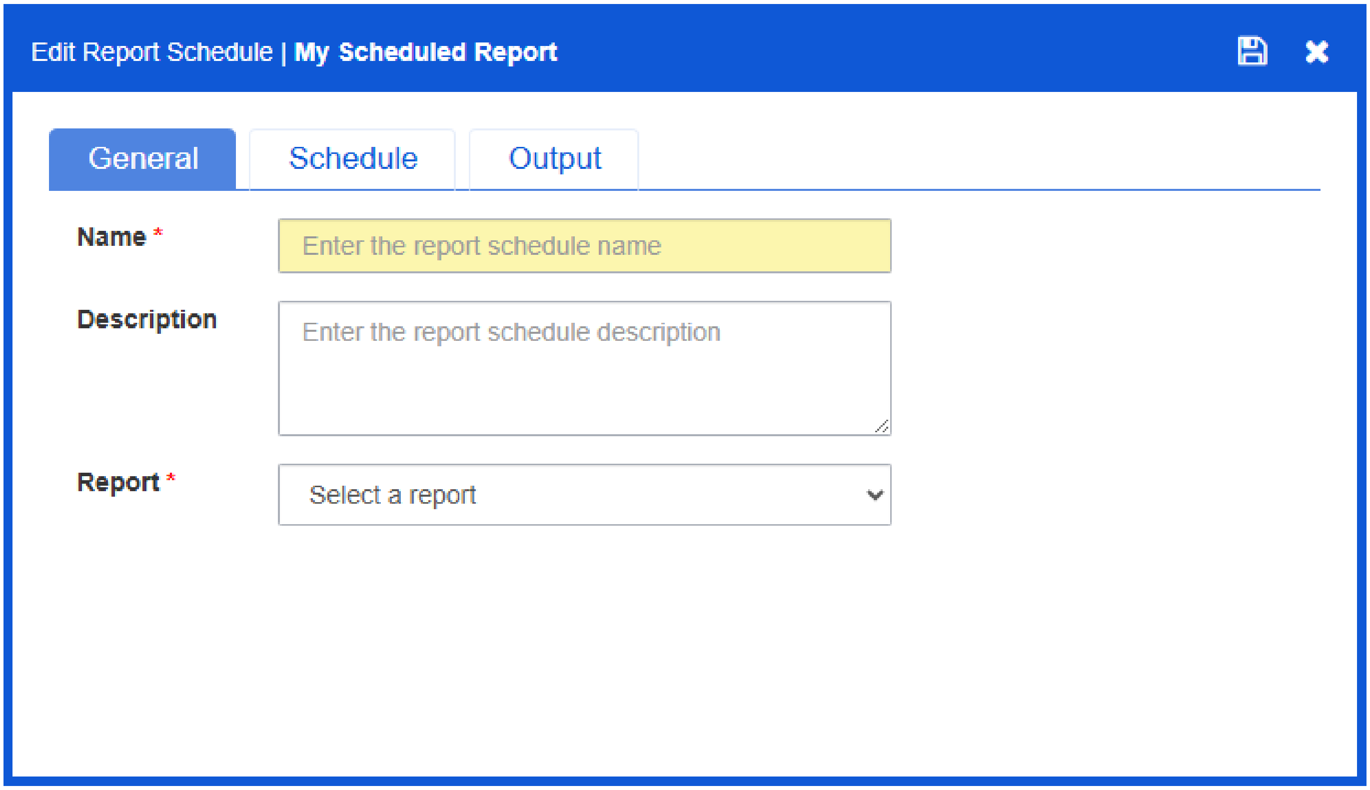
Scheduling Standard Reports [Editors]

Users can schedule standard reports in GoPlant. A scheduled report is run at a specified interval and its results are saved to a file or sent via email to one or more GoPlant users. Please note that GoPlant report scheduling is only available for built-in standard reports, not user defined reports.

To schedule a GoPlant standard report, navigate to the report schedules tab as shown below.



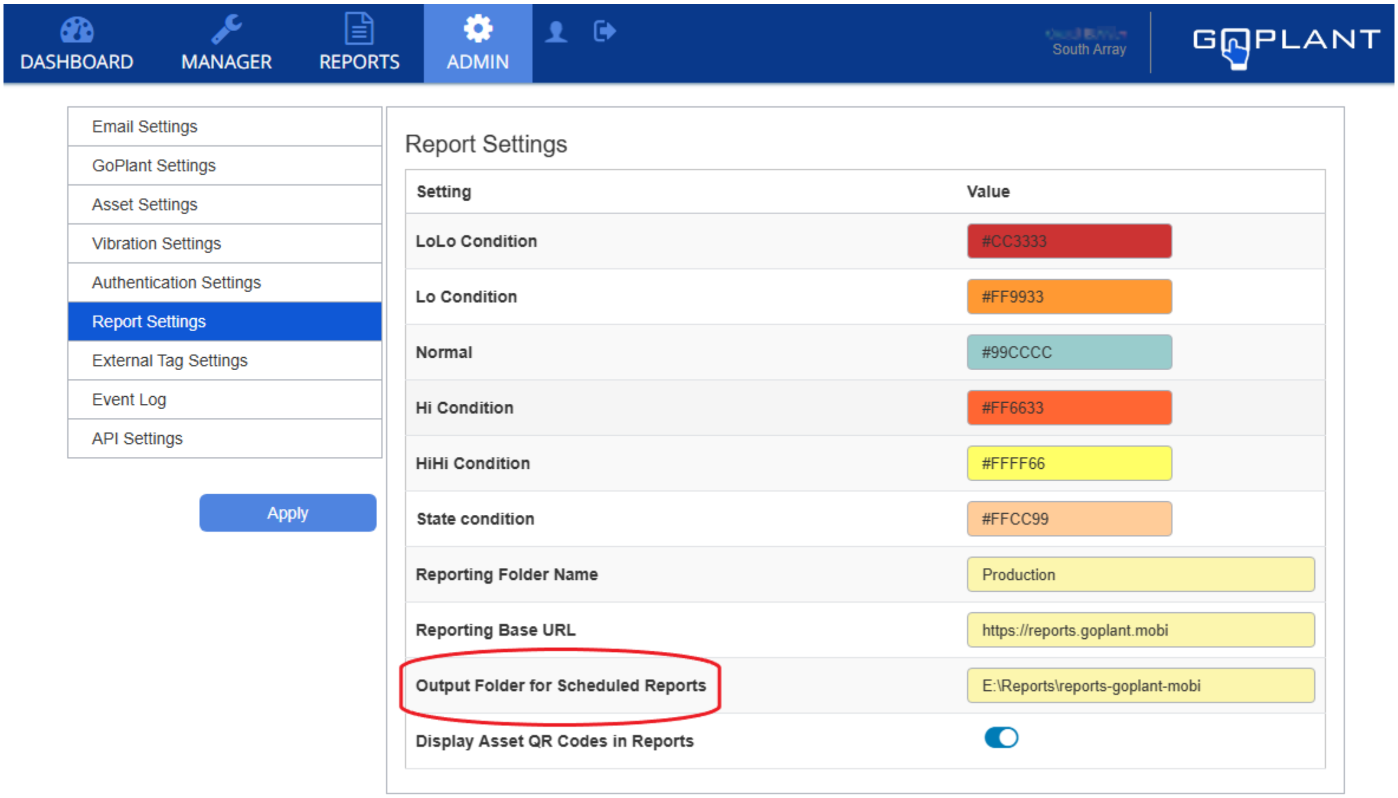
To create a new report schedule, click the “New Report Schedule” button. To edit an existing report schedule, click on the report name. Editing or creating a report schedule opens the report schedule editor seen below.



The editor has three tabs:

1. General – Specify report schedule name, select the report to run, and specify its input parameters
2. Schedule – Define the schedule for running the report
3. Output – Specify the report output format, filename for saving the report, and list of email recipients

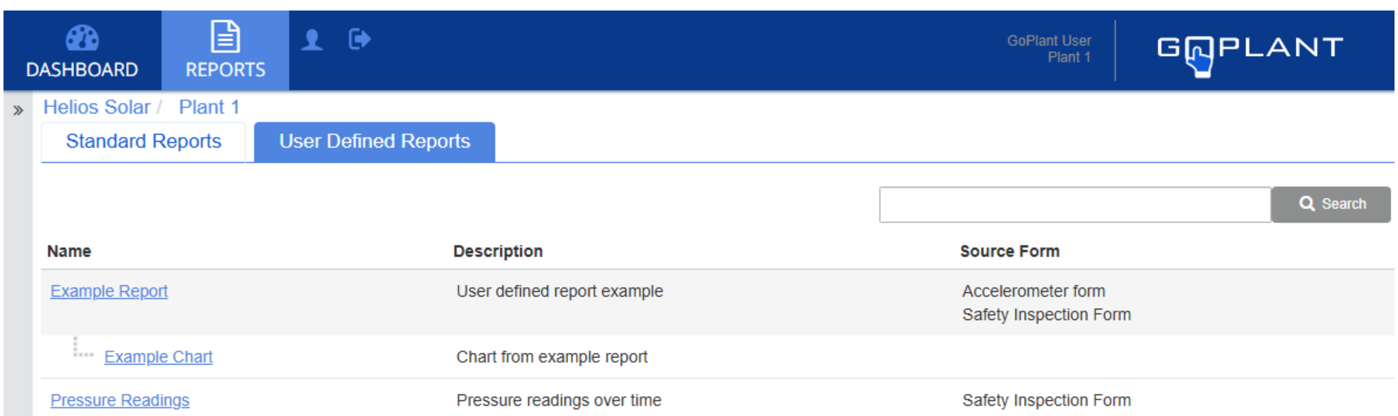
For premise installations of GoPlant, the folder where report output is written is controlled by the administrator reports setting, Output Folder for Scheduled Reports, which is shown below. Please note that the folder is specified using a Windows fully qualified path name.



For GoPlant SaaS customers, any scheduled report output that is saved to a file will be written to the customer's SFTP folder on *sftp.goplant.mobi*. If you need assistance accessing your SFTP folder, please contact technical support.

Running User Defined Reports [Reporters]

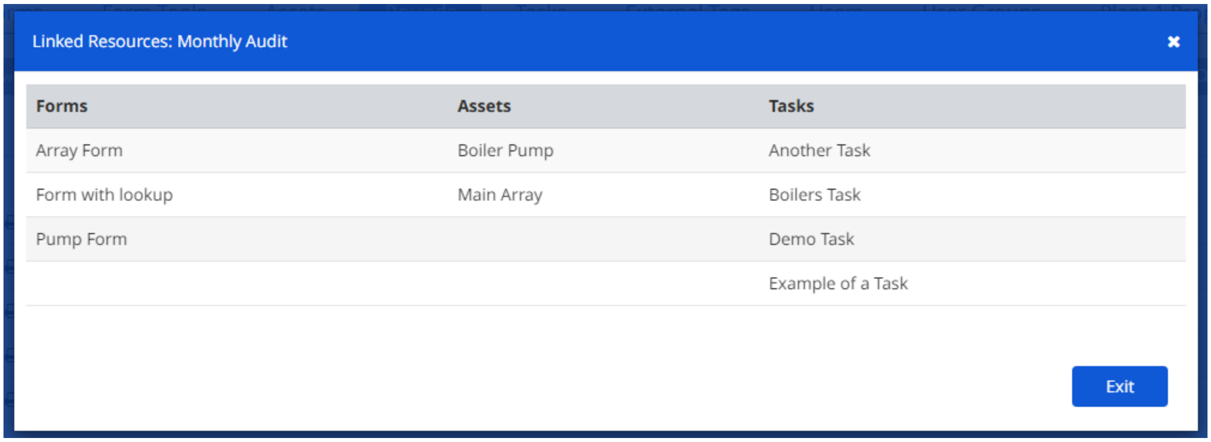
The user defined reports tab lists all user defined reports associated with the current storage group. Storage group navigation is managed via the sidebar in the same manner as the manager tab. For each report, the report's description and associated forms are listed.



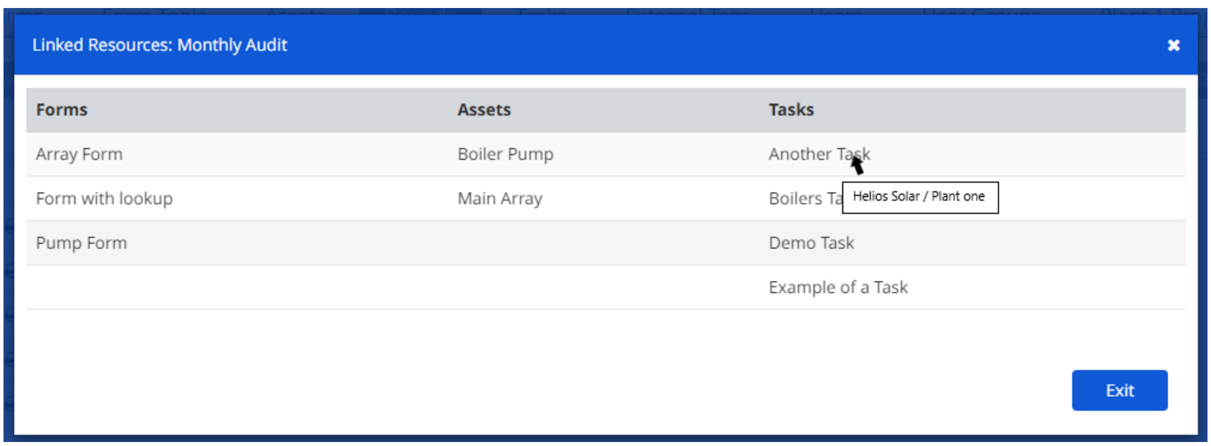
User defined reports are invoked by clicking on the reports name and then providing any required input.

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.



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



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

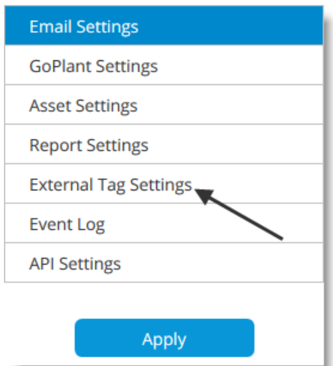
To begin with External Tags the Tag Sources must be defined. A Tag source is the 'type' designation for grouping tags together. The Tag source groups together all tag names that belong to one grouping or external software package link. Hundreds of tags may be grouped together for reporting and exporting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

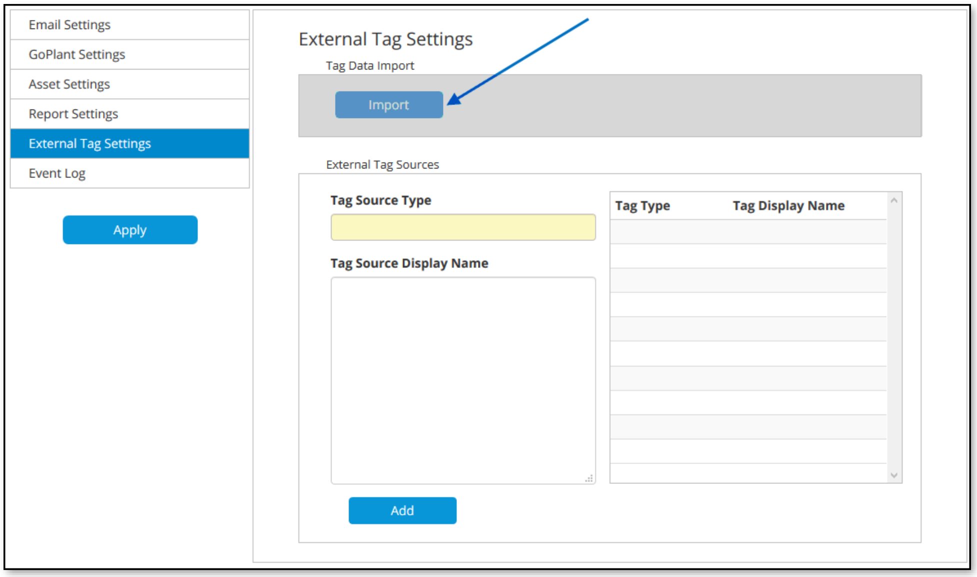
These Tag sources group the tags together for exporting via the API, Reports, and output to files. CSV output reports may be executed by Tag Source so that all data gathered from the operators can be easily exported by date range. The Tag Source also defines the type of tag displayed on the Form during 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).

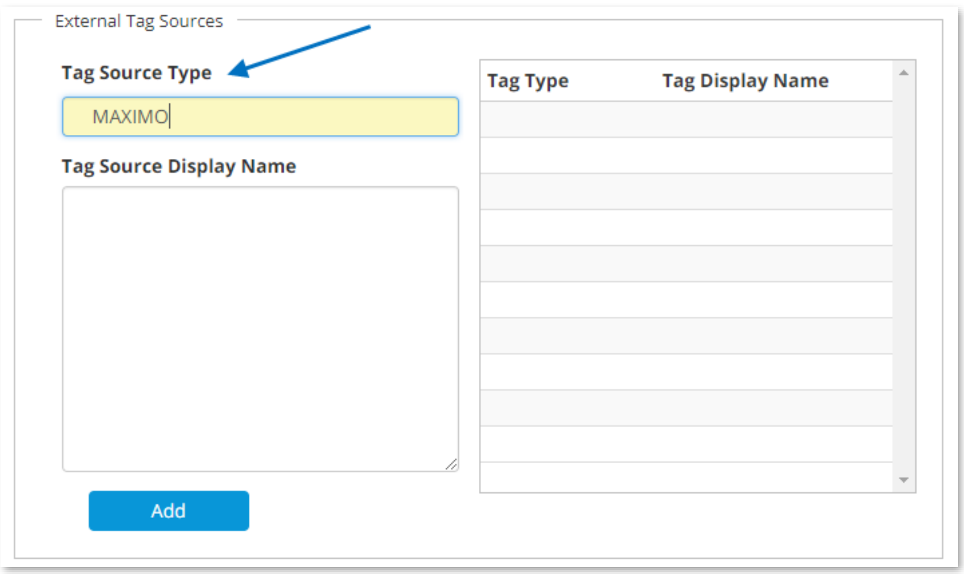
- Select the ADMIN button.



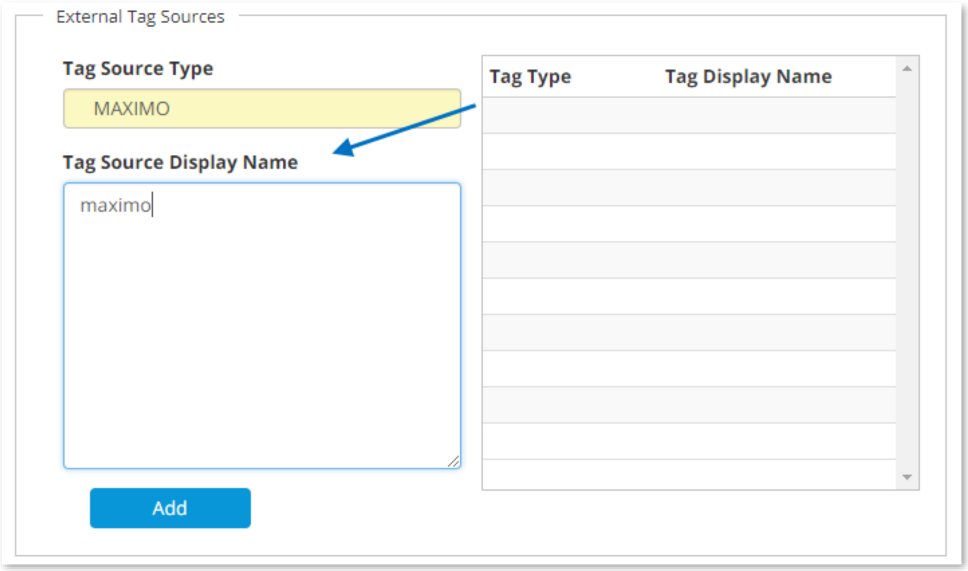
- Choose the ‘External Tag Settings’ from the left side menu.



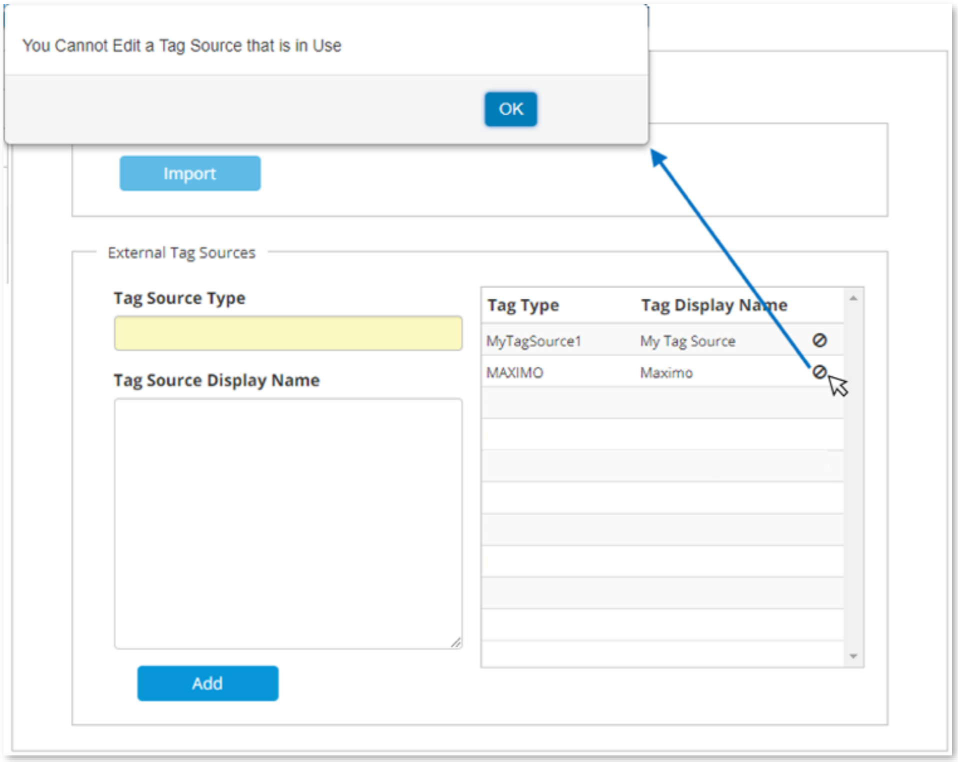
- The Tag Settings area is displayed. Currently the 'Import' function is disabled. If there is an immediate need to bulk import tags, please contact support and we will assist with this process.



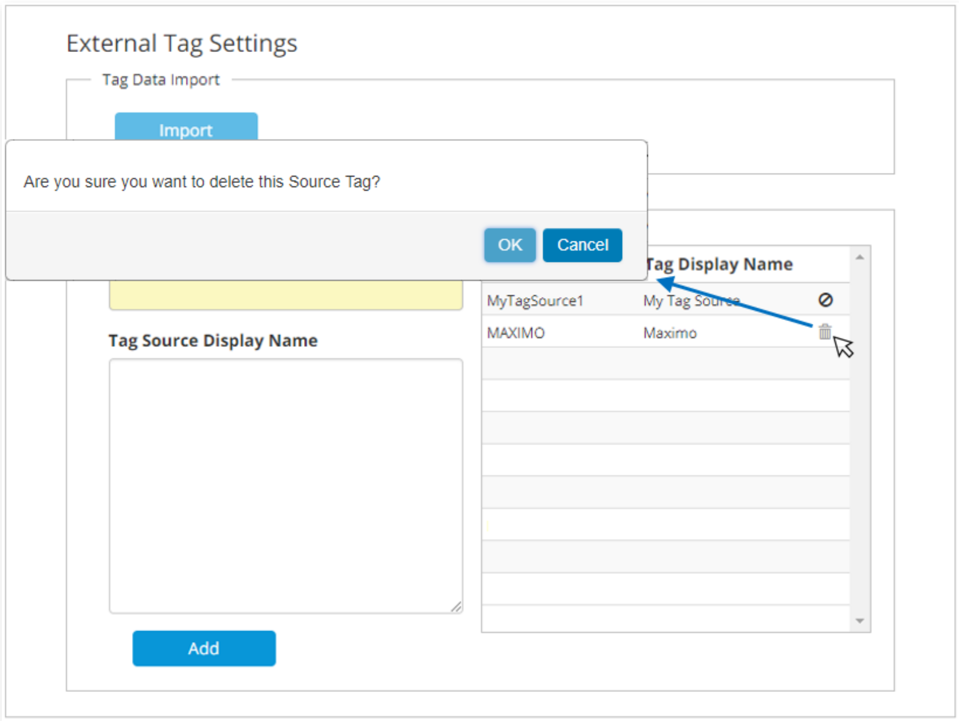
- The Tag Source Type field is a unique field that is used to export and query GoPlant for the tag data. This field will update your input to make the label all uppercase characters with no spaces. This change is required to keep a unique identifier used by IT departments and the API functions that will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



- 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.



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

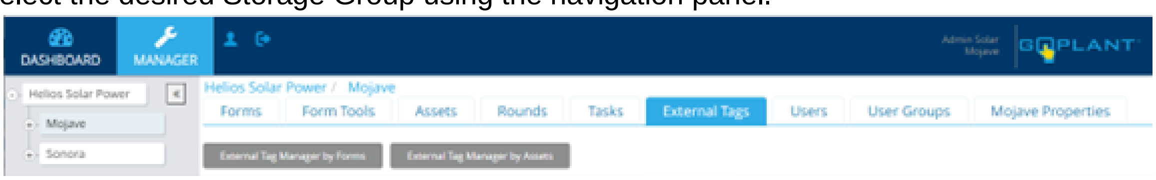


- If all tags are removed from the source, then you may delete the Tag Source Type via the trash can icon. 

External Tags – Tag Management

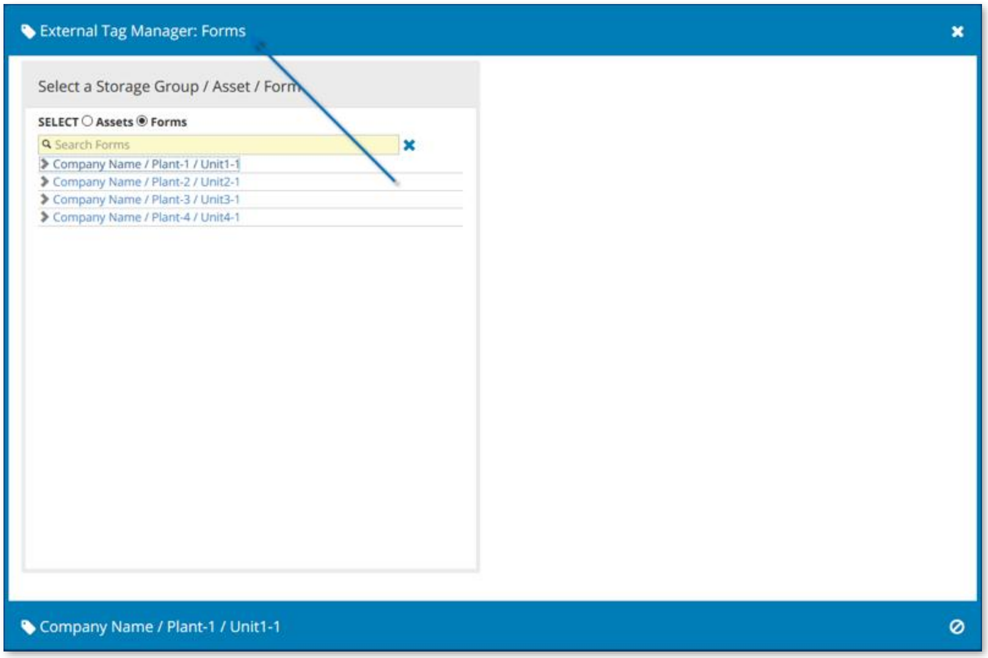
External Tags are assigned via the External Tag Management Window. The Tag Management window allows editing both Form and Asset/Form External Tags. The Tag can be assigned to Form Steps to label the response for that question. Because Forms are created for multiple assets (to save time and handle consistency), 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.

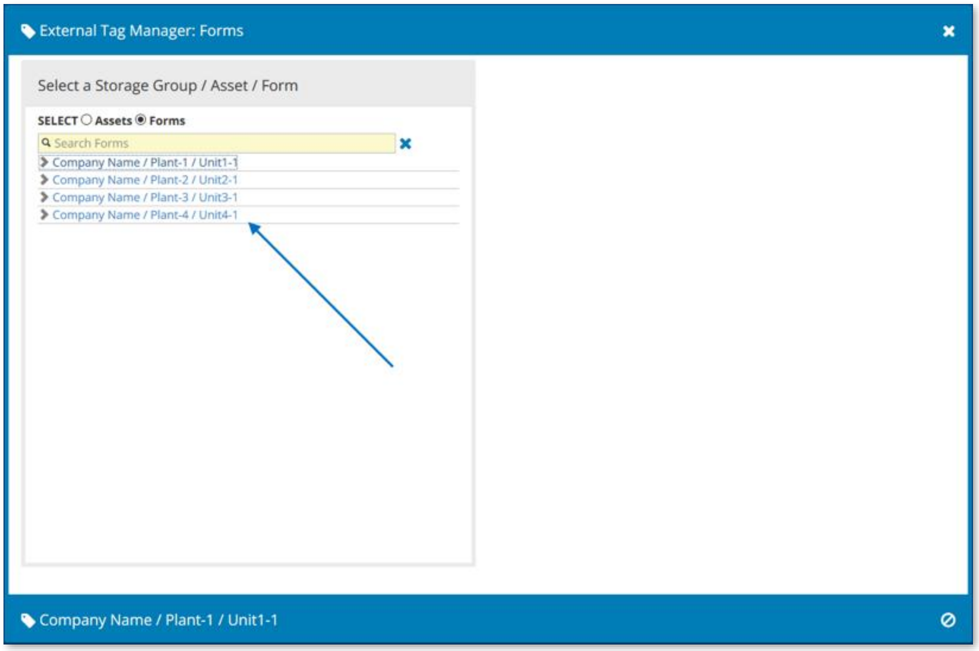


- Select the 'External Tags' tab from the Manager.

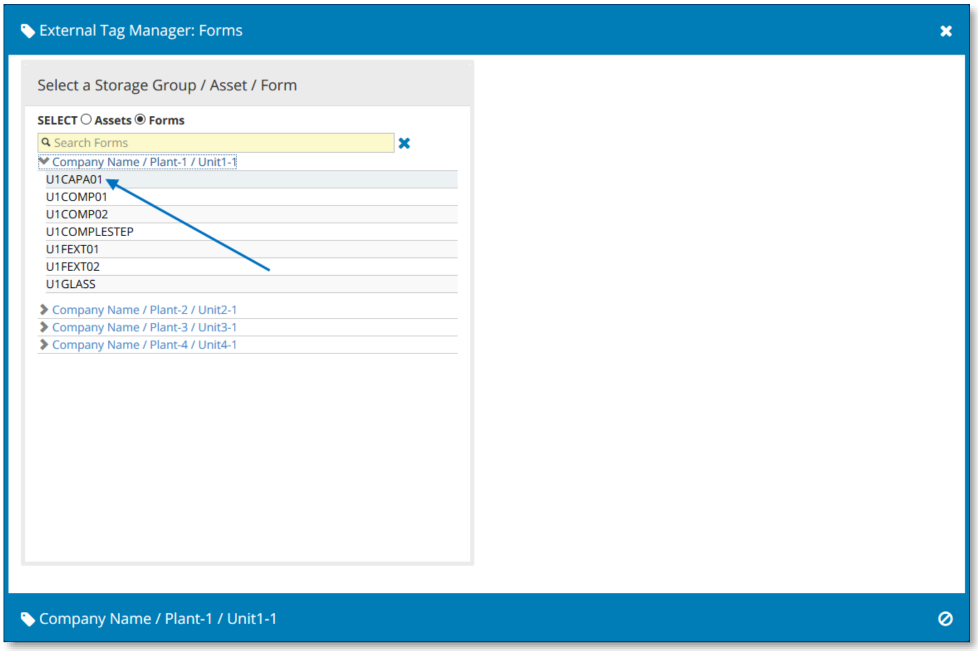
- Tags are assigned at the Form or Asset Form relationship. A Form can have its own tags when no asset is assigned, as well as individual entries for each Asset that the Form is associated with. For example, if a Form is assigned to 10 of the same pumps within a Plant, the form can have unique tags for 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.



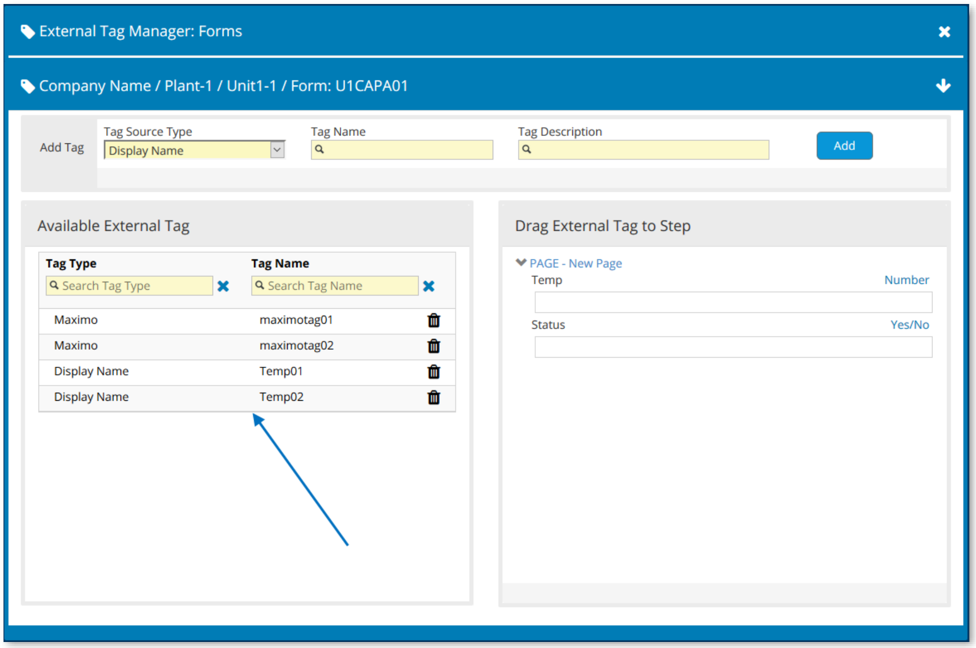
- Select 'External Tag Manager by Forms'. The external Tag manager window appears. The window is designed in a split format. After choosing the Asset / Form combination, the Tag editor scrolls up from the bottom of the screen. You can switch between 'Assets' and 'Forms' at any time in the Editor.



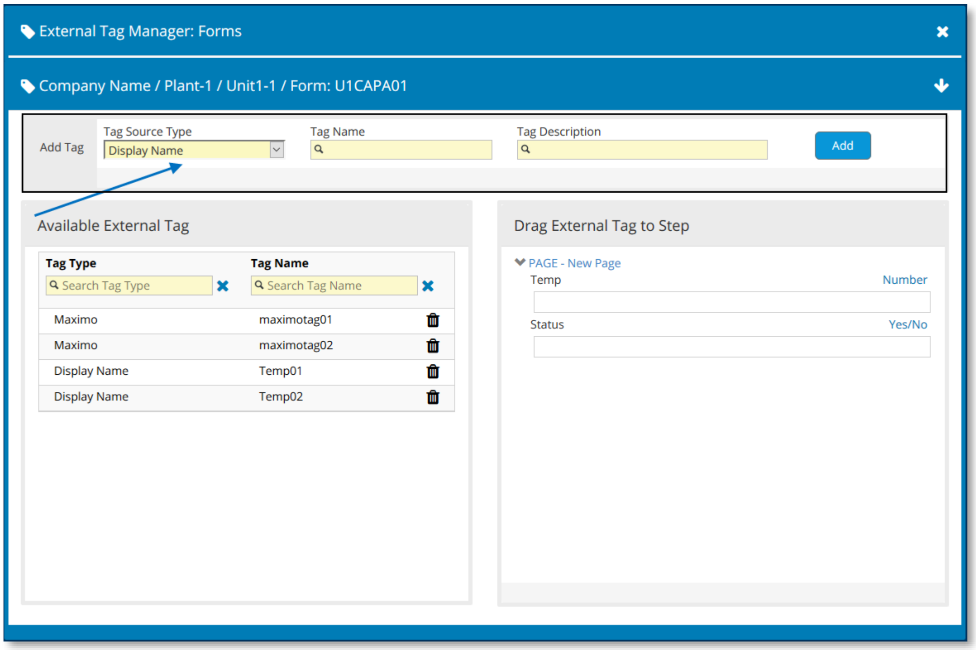
* A list of the Storage Groups is displayed in Blue on the left side of the screen. Expand the storage group in order to locate the specific Form you will assign tags.



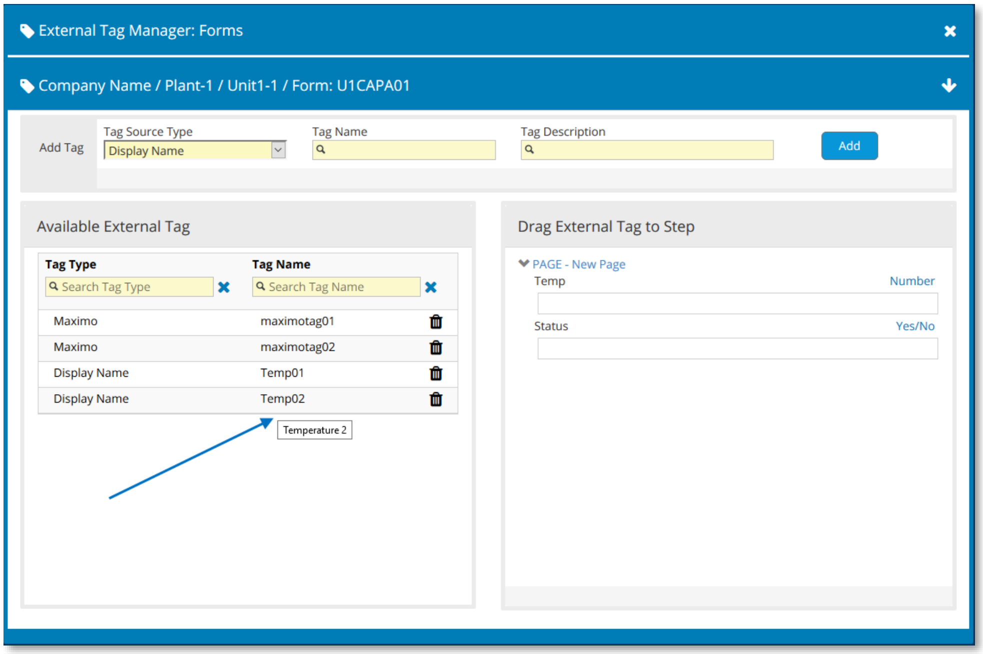
* Select the appropriate Form. The editor window will scroll up from the bottom of the screen.



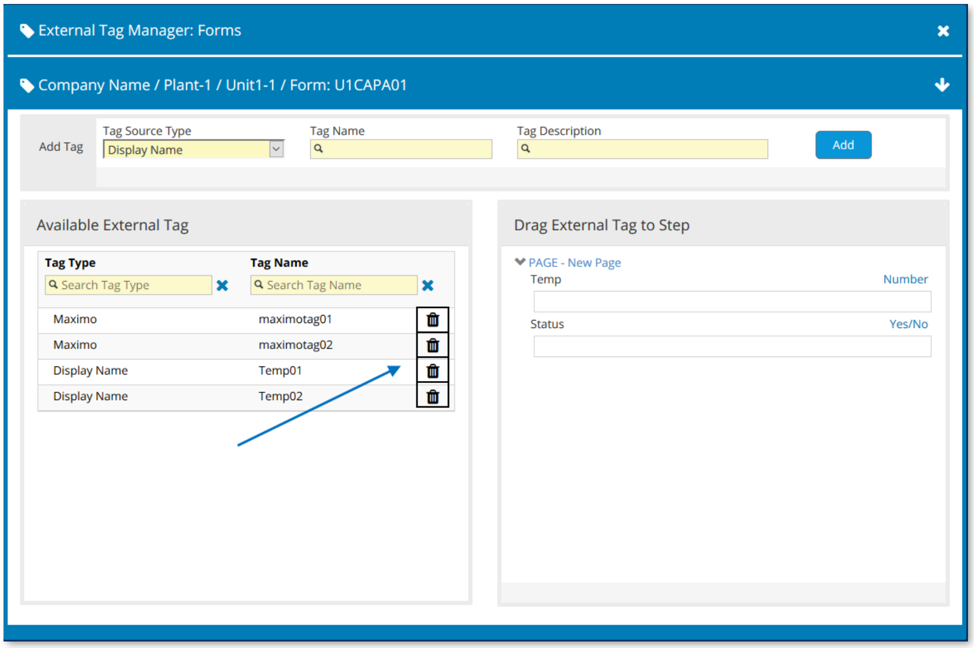
* If there are any tags loaded for this Form, they will be displayed in the bottom left box area. The Form pages along with step questions, response type, and a drag/drop area appear on the lower right side of the screen.



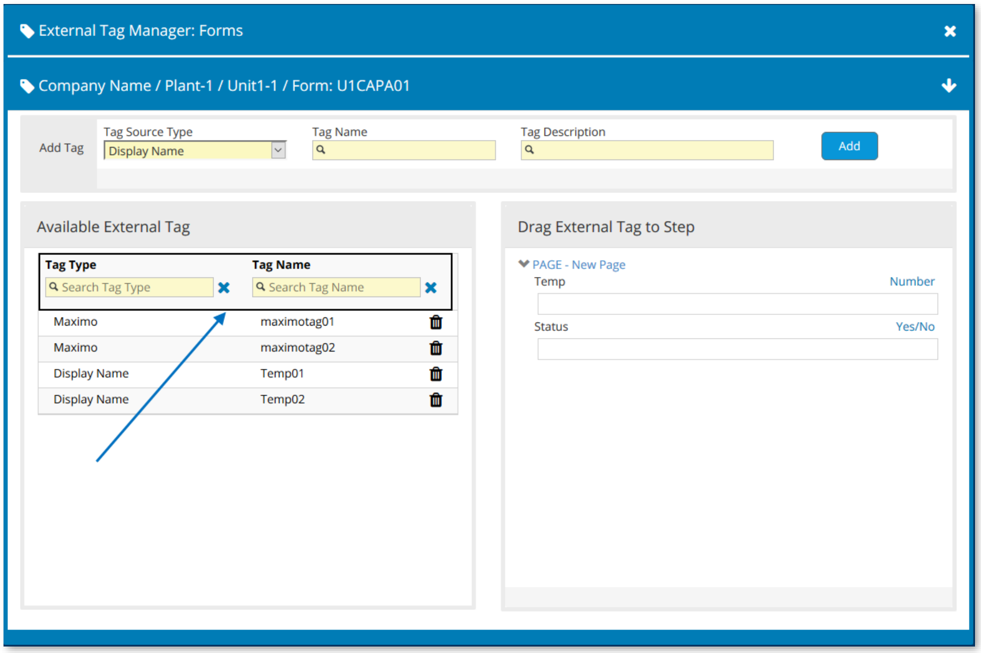
- At the top, Tags can be added for this Form (Add Tags section). Choose the Tag Source from the dropdown list. To create a new tag, simply enter both the tag name and optionally a Tag Description. Press the blue “Add” button to add the tag.



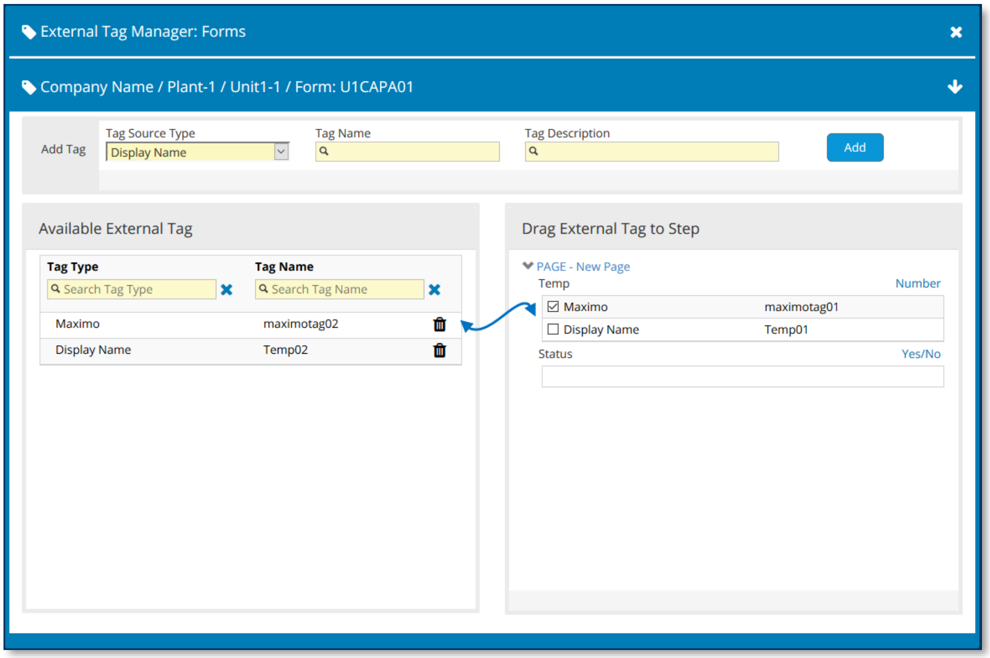
- Available Tag area: This area shows the tags that are available for assignment to the Form Step questions. If you hover over the tag, the description will appear in a tool text window.



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



- Search windows are available to quickly locate tags.



- 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]*

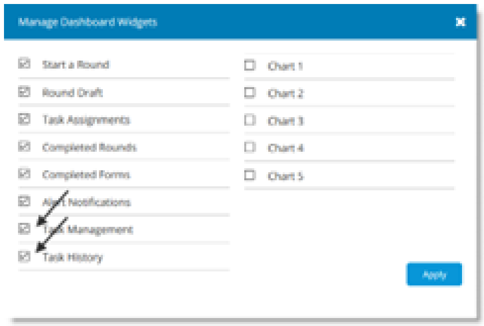
Managing tasks in GoPlant can be done through both the Task Management and Task History widgets. These widgets give the user information about the tasks, to include their status and percentage complete. GoPlant allows users to select tasks to see more details specific to the task (i.e., assignees, status, 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.

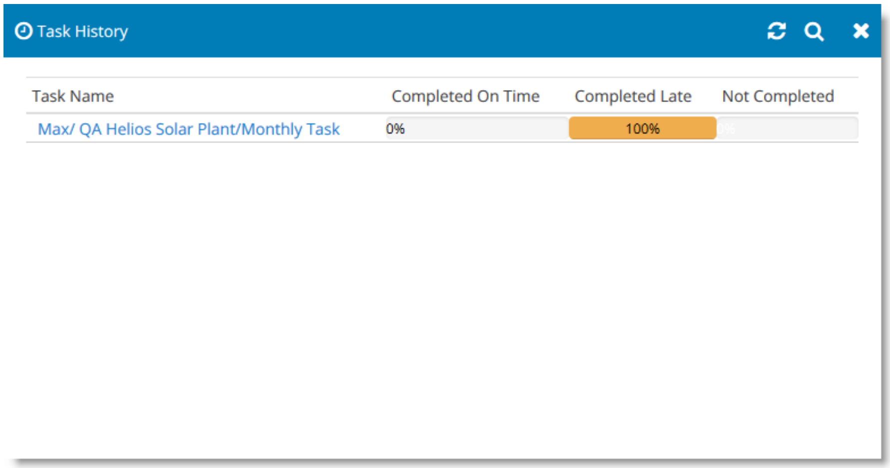
- Task events are defined by the following status:
    a. In Progress: A task will show this status at the start time (defined in task).
    b. Completed: Completed tasks are those completed by at least one of the assignees.
    c. Late: Tasks are considered late when the task is incomplete and the task 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.

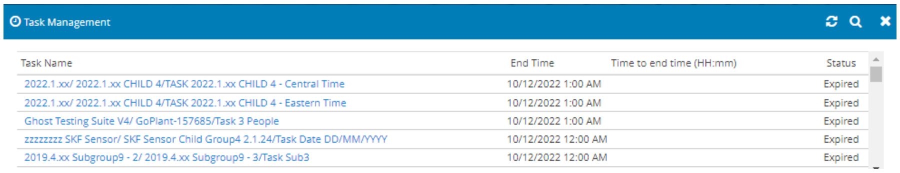
- Select the Manage Dashboard Widgets icon to see a list of available dashboard widgets.



- 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.





Task Management Widget

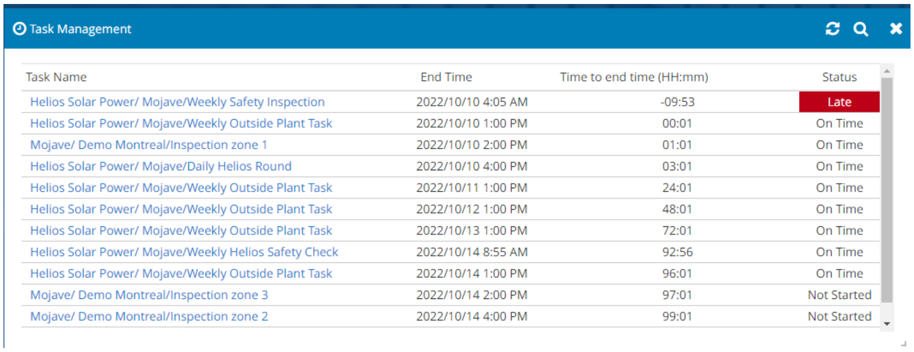
The Task Management widget allows the user to view a list of task events and provides the user with the remaining time before the end time and current status. The widget displays one row per Task Event with a query for the current day from 12:00:00AM to 11:59:59PM for all task events with a “start time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

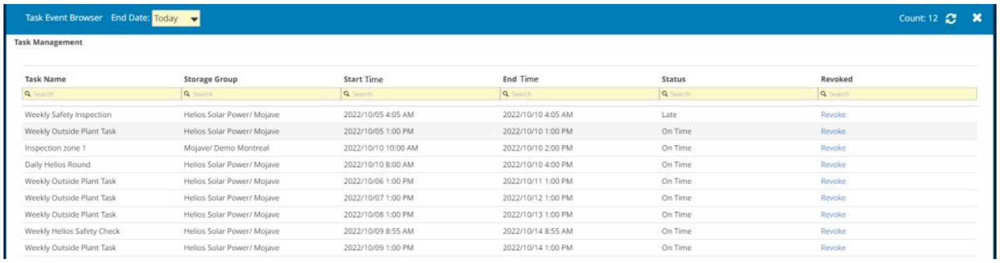


Task Management

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.

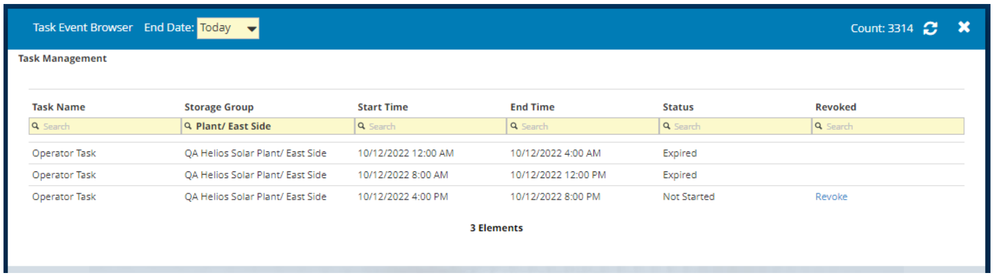
The Task Event Browser page will appear.


Task Event Browser End Date: Today Count: 12

Task Management

Task Name	Storage Group	Start Time	End Time	Status	Revoked
Weekly Safety Inspection	Helios Solar Power/ Mojave	2022/10/05 4:05 AM	2022/10/10 4:05 AM	Late	Revoke
Weekly Outside Plant Task	Helios Solar Power/ Mojave	2022/10/05 1:00 PM	2022/10/10 1:00 PM	On Time	Revoke
Inspection zone 1	Mojave/ Demo Montreal	2022/10/10 10:00 AM	2022/10/10 2:00 PM	On Time	Revoke
Daily Helios Round	Helios Solar Power/ Mojave	2022/10/10 8:00 AM	2022/10/10 4:00 PM	On Time	Revoke
Weekly Outside Plant Task	Helios Solar Power/ Mojave	2022/10/06 1:00 PM	2022/10/11 1:00 PM	On Time	Revoke
Weekly Outside Plant Task	Helios Solar Power/ Mojave	2022/10/07 1:00 PM	2022/10/12 1:00 PM	On Time	Revoke
Weekly Outside Plant Task	Helios Solar Power/ Mojave	2022/10/08 1:00 PM	2022/10/13 1:00 PM	On Time	Revoke
Weekly 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	Revoke

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


Task Event Browser End Date: Today Count: 3314

Task Management

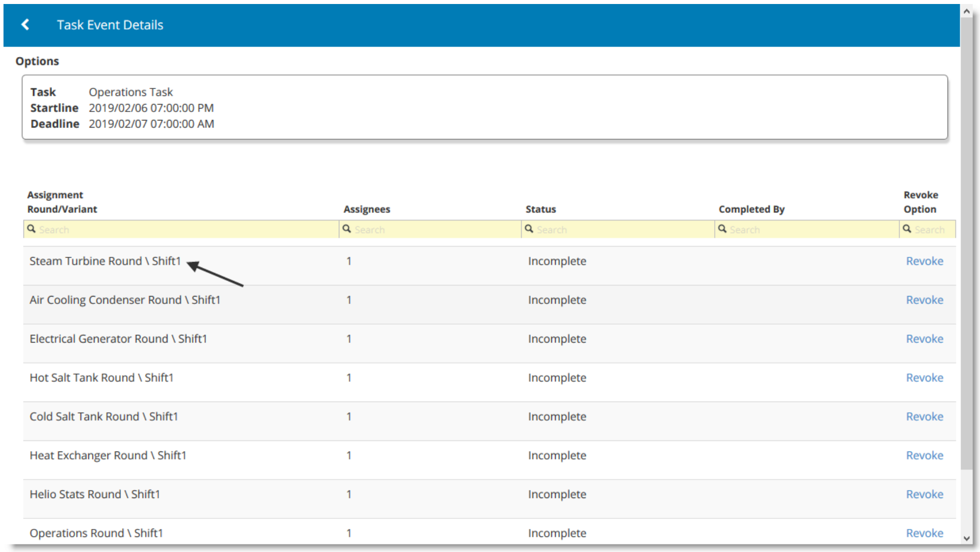
Task Name	Storage Group	Start Time	End Time	Status	Revoked
Search	Plant/ East Side	Search	Search	Search	Search
Operator Task	QA Helios Solar Plant/ East Side	10/12/2022 12:00 AM	10/12/2022 4:00 AM	Expired	
Operator Task	QA Helios Solar Plant/ East Side	10/12/2022 8:00 AM	10/12/2022 12:00 PM	Expired	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

3 Elements

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.


Task Event Details

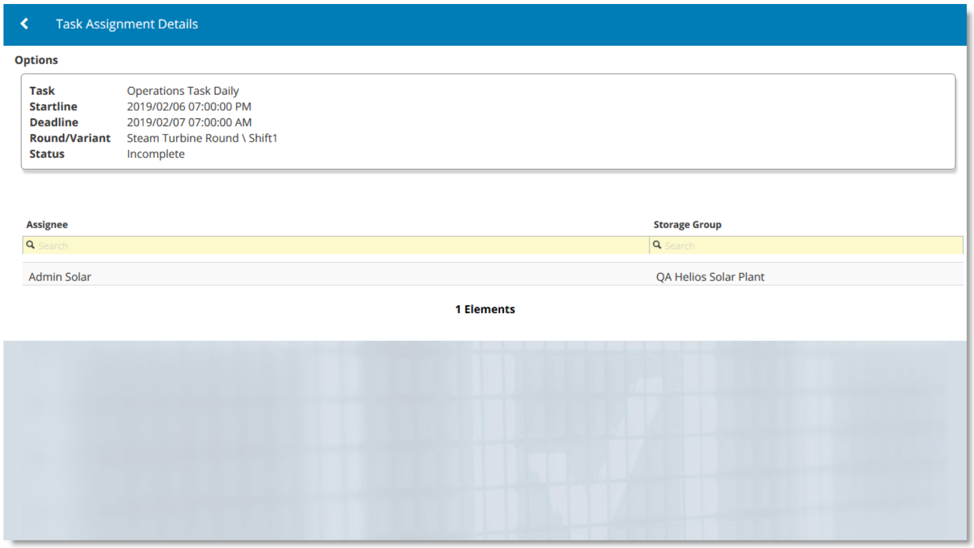
Options

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
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 History Widget

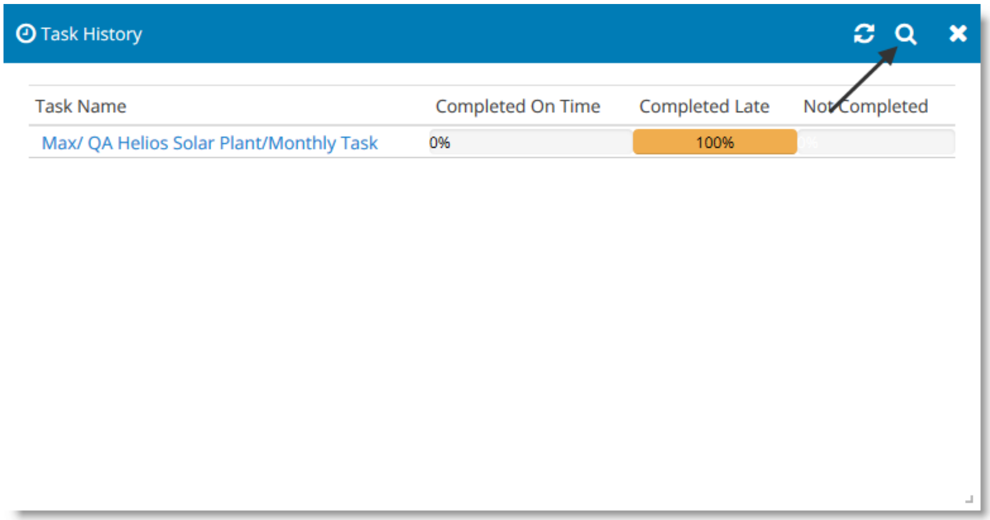
The Task History widget allows the user to view a list of combined task events and provides the user with a percentage of tasks completed and/or late. The widget displays one row per Task Event name (combines all task events with the same name) with a query from “Today” at 11:59:59 PM including the last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

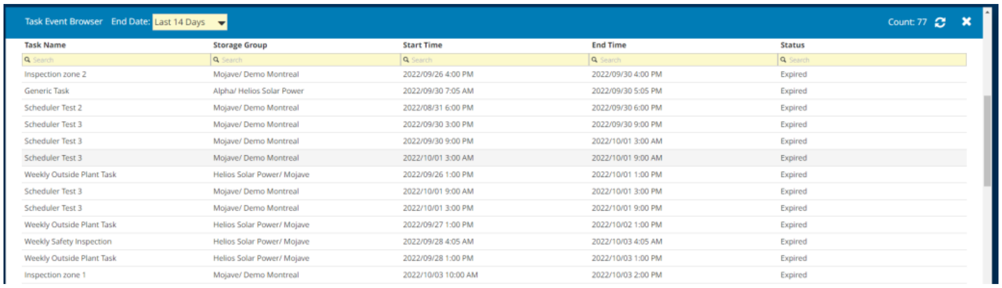
c. *# Completed Late:* displays percent of tasks for past 2 weeks completed after end time and/or expired time (percent is number of completed late divided by the number of total tasks). Color is yellow if over 0%, otherwise no color is displayed).

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).

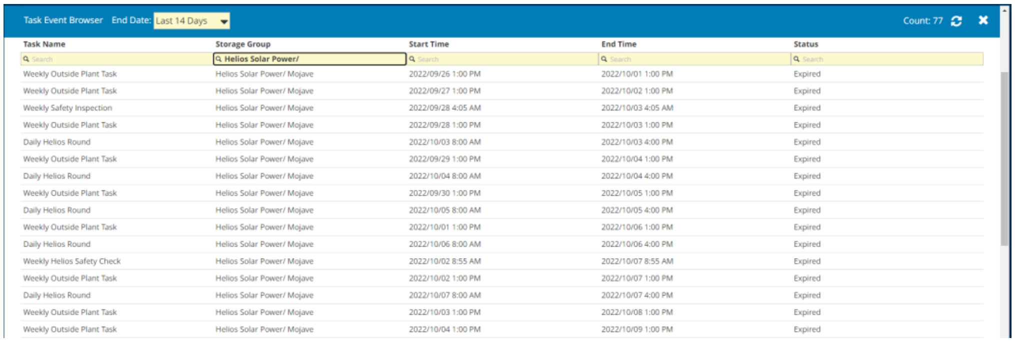


- Select the browse icon to go to the Task Event Browser to see a list of all task event records for the past 2 weeks.

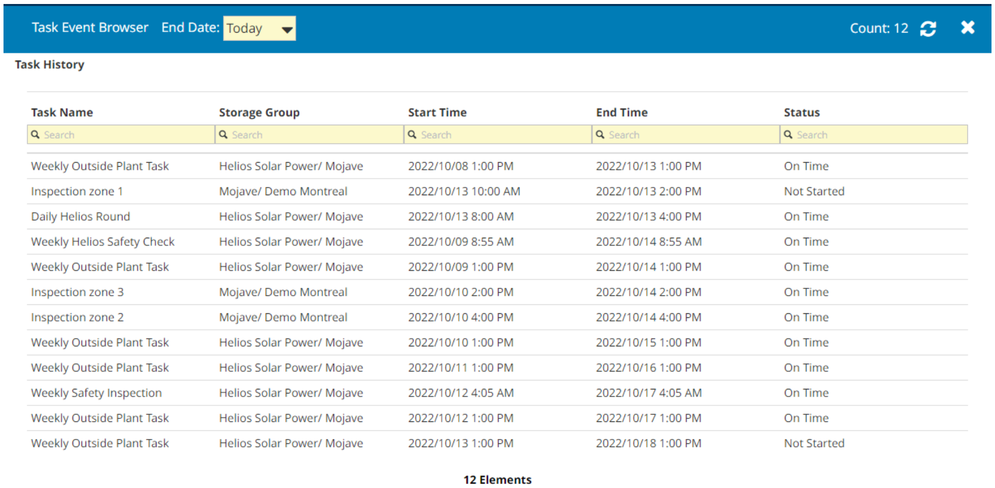
  The Task Event Browser page will appear.



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



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



Task Event Browser End Date: Today Count: 12

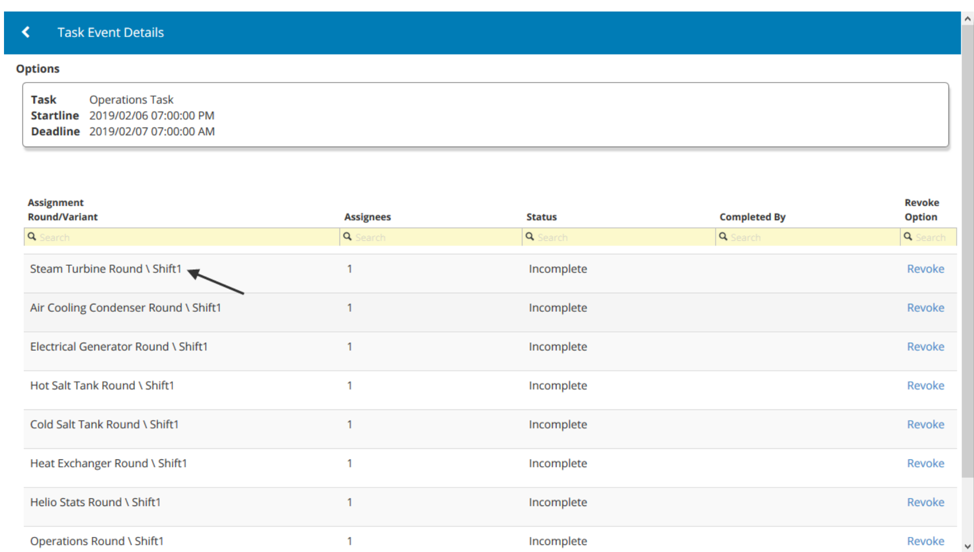
Task History

Task Name	Storage Group	Start Time	End Time	Status
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

12 Elements

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

The Task Event Details page will appear.



Task Event Details

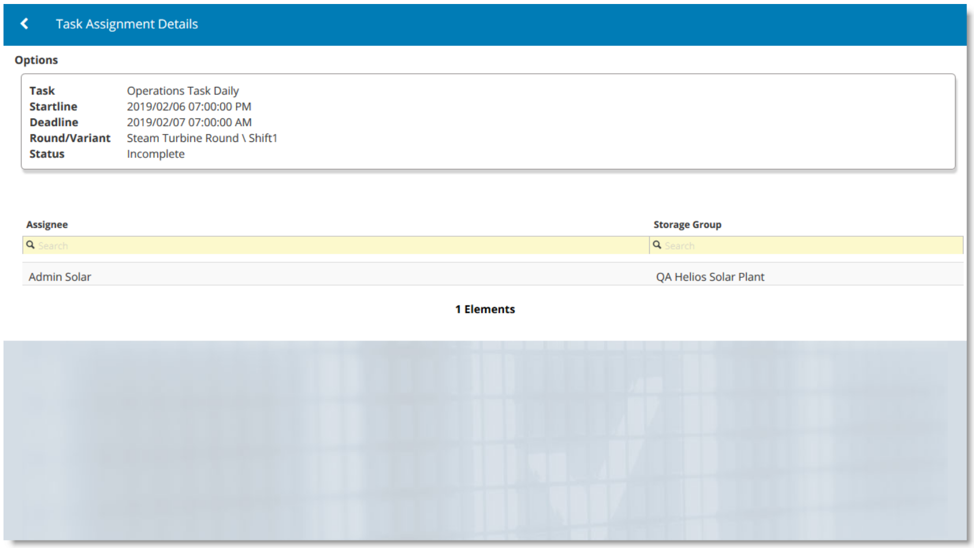
Options

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
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.

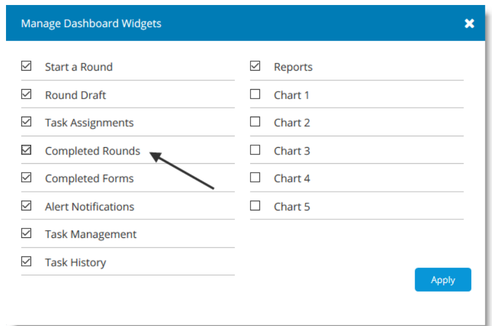
The Task Assignment Details page will appear.



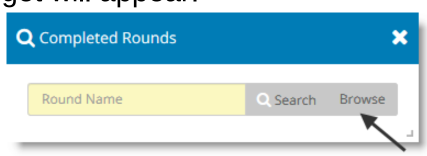
Performing Supervisory Reviews *[Reviewers]*

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.



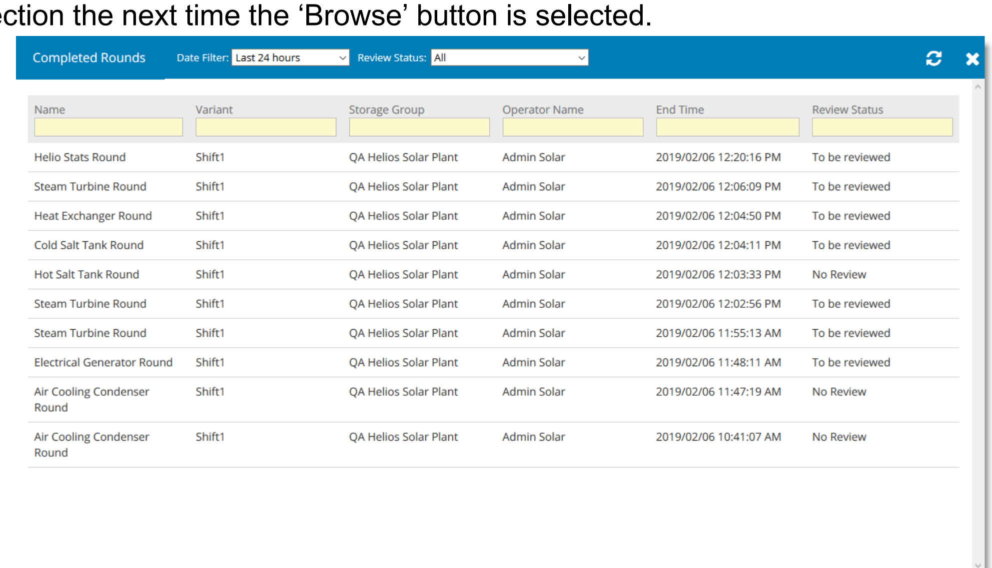
- The **Completed Rounds** widget will appear.



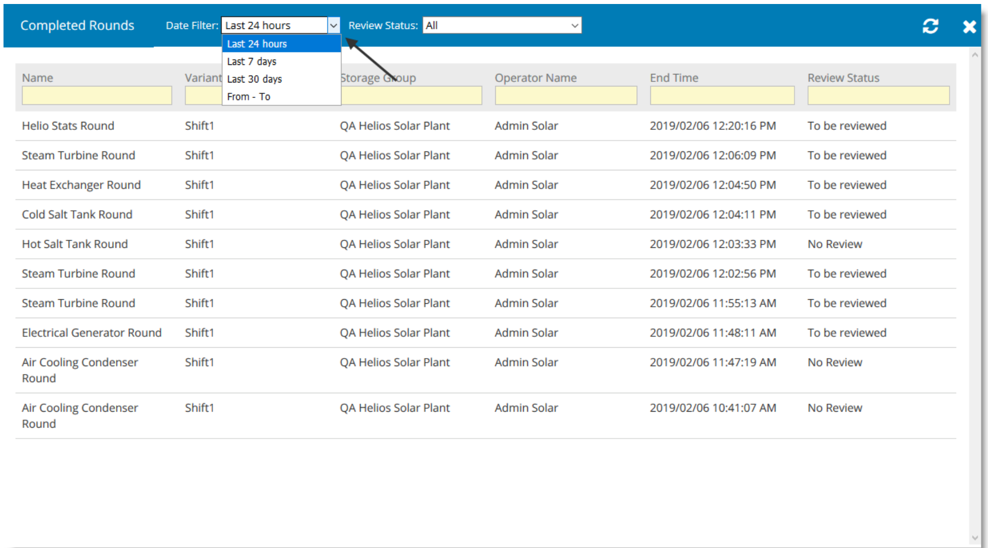
- Select **Browse**.

The list of completed rounds will appear.

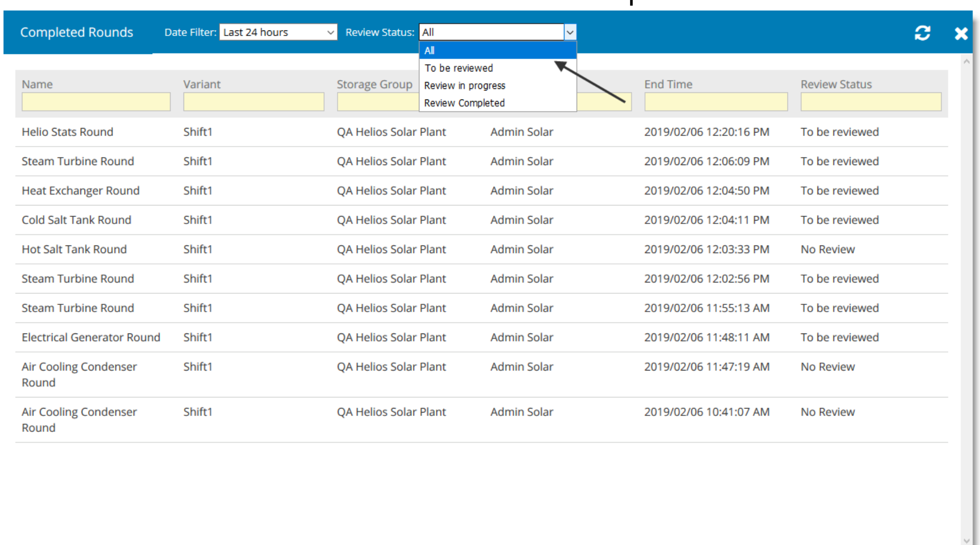
Note: The list of completed rounds will display all rounds completed within the last 24 hours by default. The timeframe selection will remember the last choice from this window so that it defaults to that selection the next time the ‘Browse’ button is selected.



Name	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

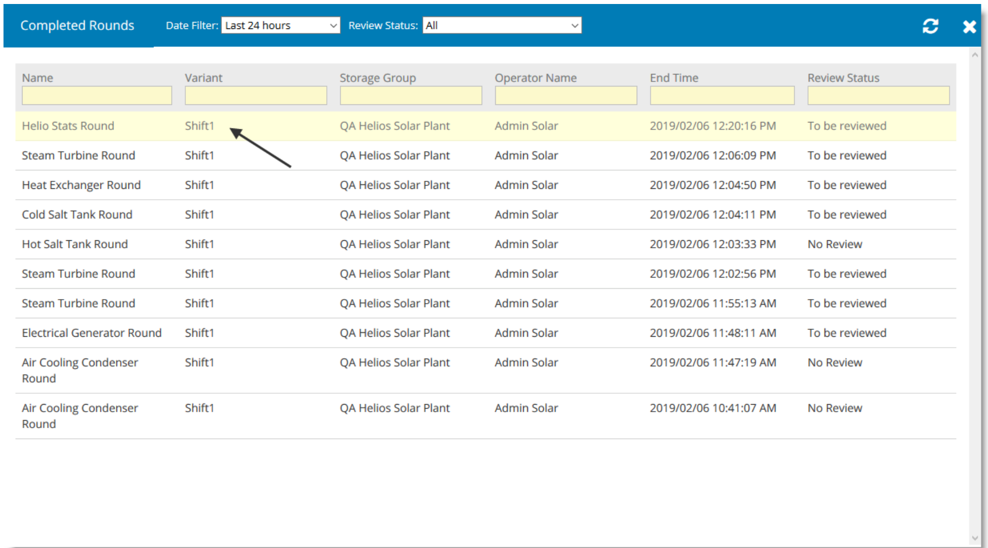


- Optional: Select the Date Filter to filter the forms from a previous date.

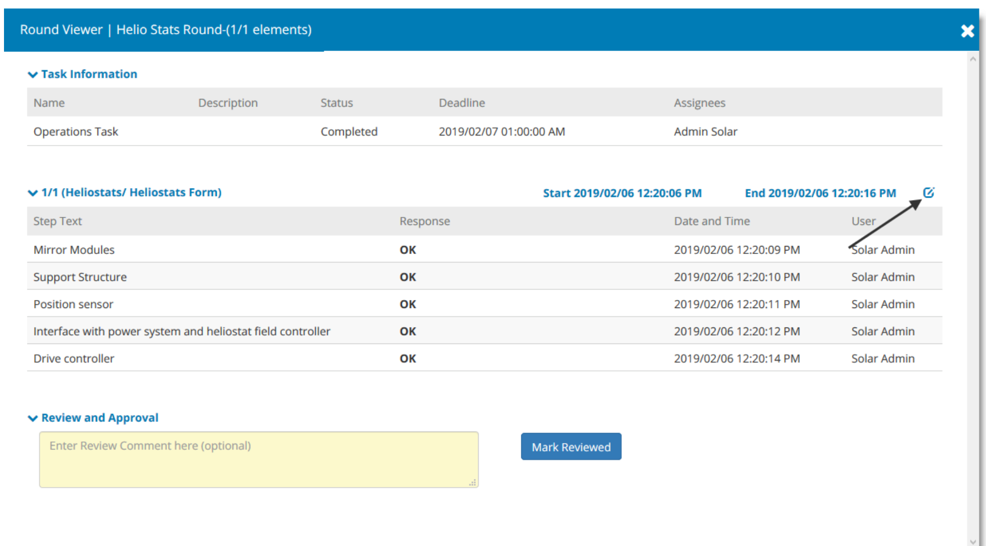


- Select “To be reviewed” in the Review Status dropdown to view only those rounds that need to be reviewed.

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.

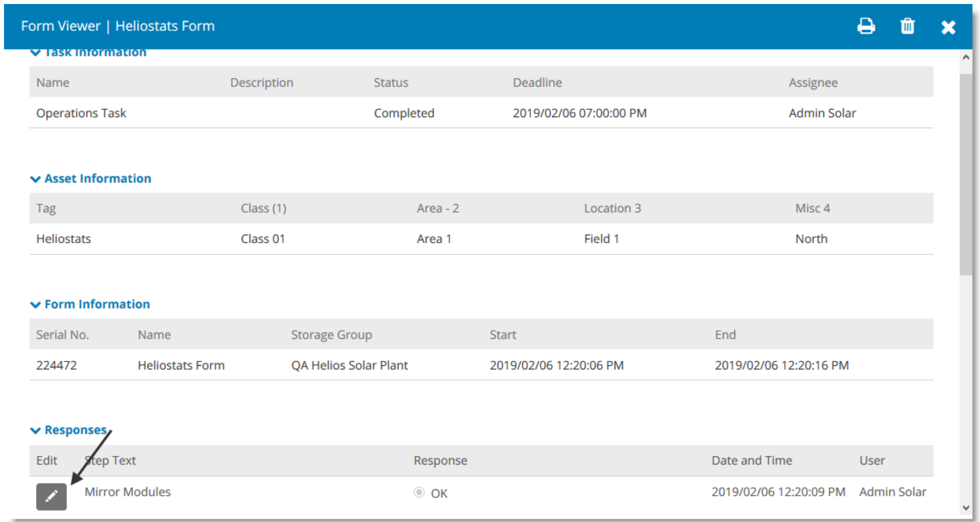


- Select a round. The completed forms will display. If the Round was within a Task the Task Information appears at the top of the page. Each Round Element completed will appear in the view.



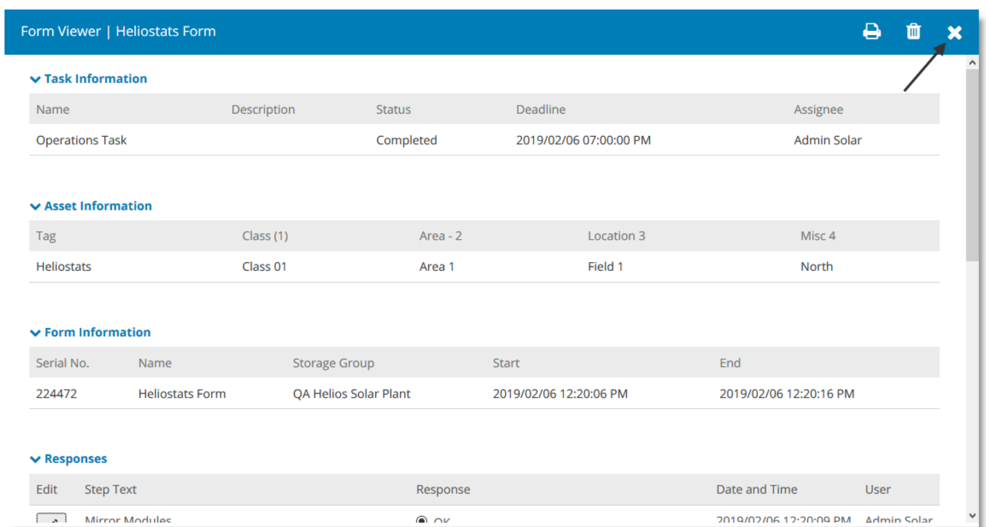
- Select the edit icon to edit the Round Element Form collected data, if needed.

Note: Only Admin and Editor role users will have the ability to edit a completed form.

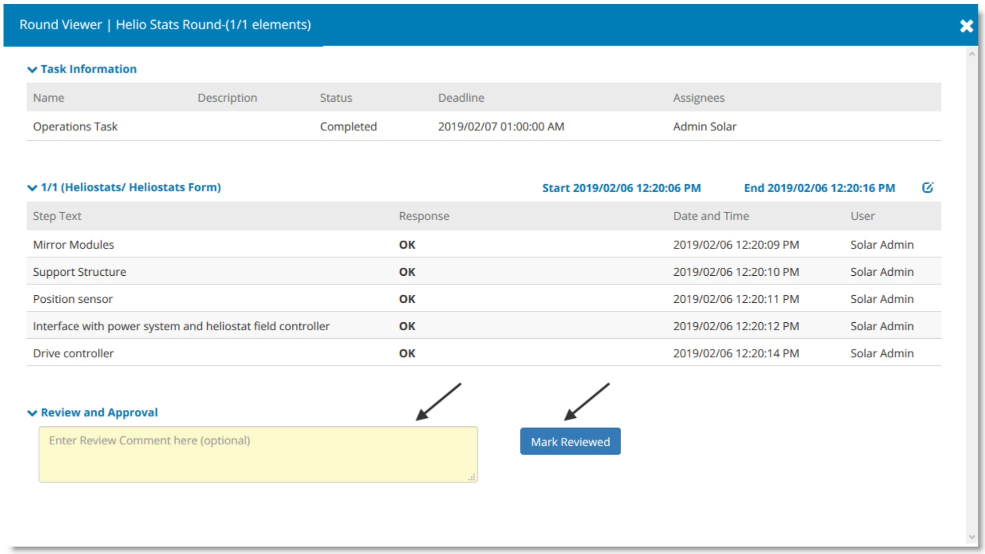


- Select the edit icon to change the collected response data.

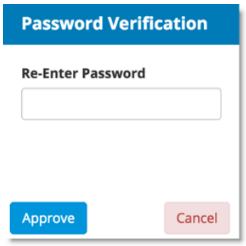
Note: GoPlant will update the response and retain the previous data for auditing purposes. The response value will update with a new date time stamp and the editors username.



- Select “X” to close the completed form. The round under review will appear.



- At the bottom enter a comment and select “Mark Reviewed” to accept the round.



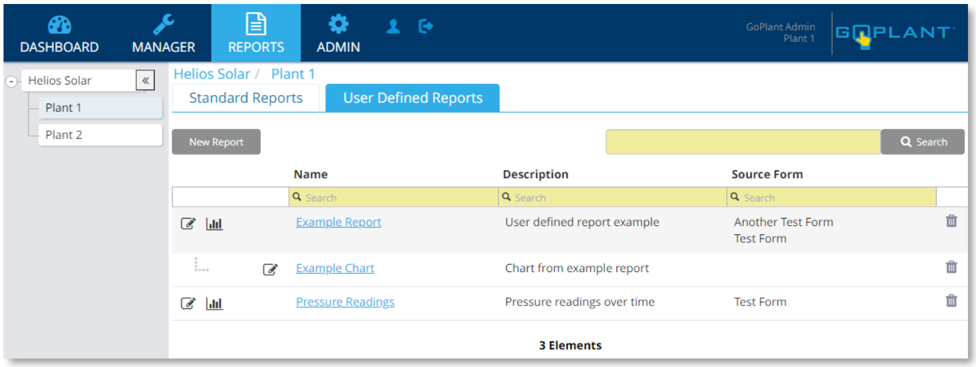
Note: If the round requires a password for authentication, the reviewer will be required to re-enter their password for round approval.

Creating Reports and Trend Charts *[Admin, Editor]*

Creating a GoPlant User Defined Report

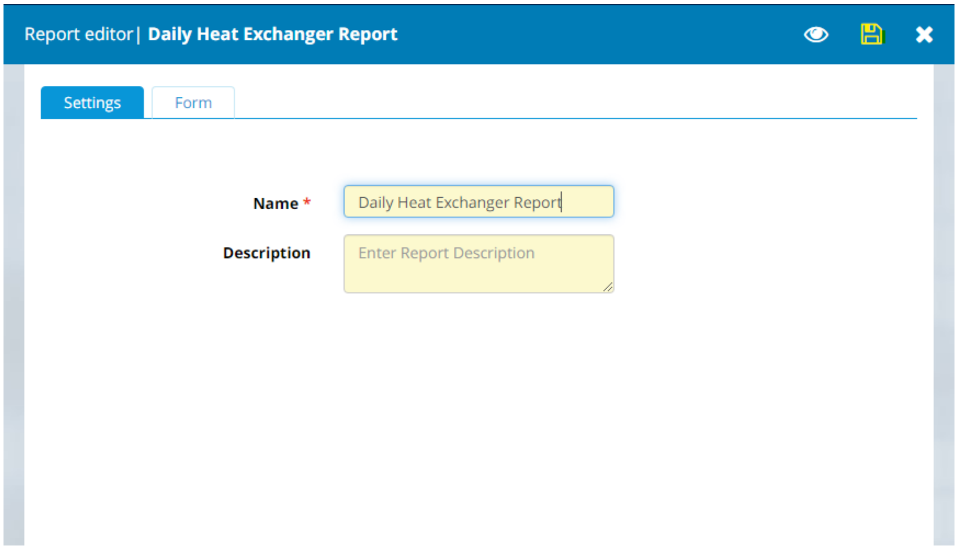
- Select the **Reports** tab and the **User Defined Reports** sub tab.

- 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.

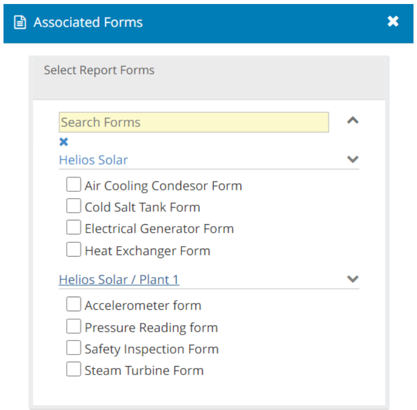


- Create a new report by selecting .

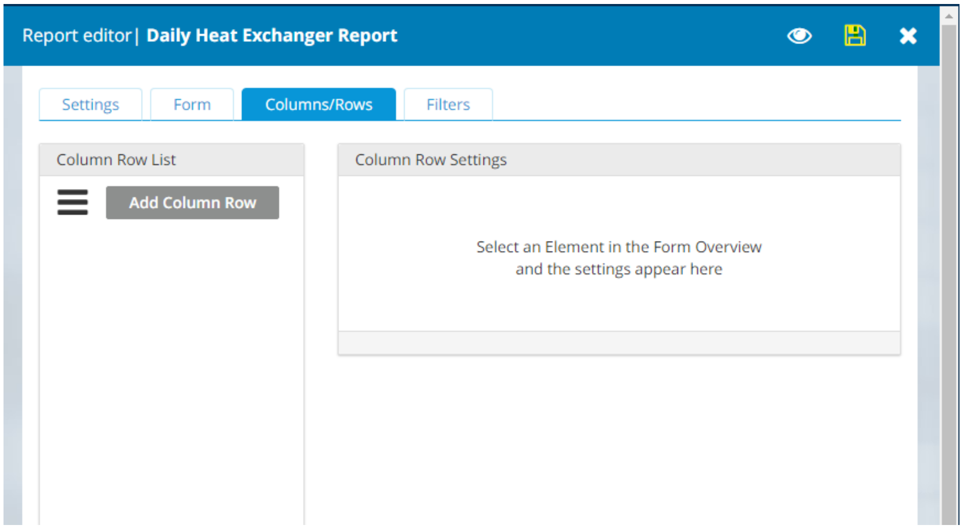
- Click **New Report**. The Report window opens on the Settings tab:



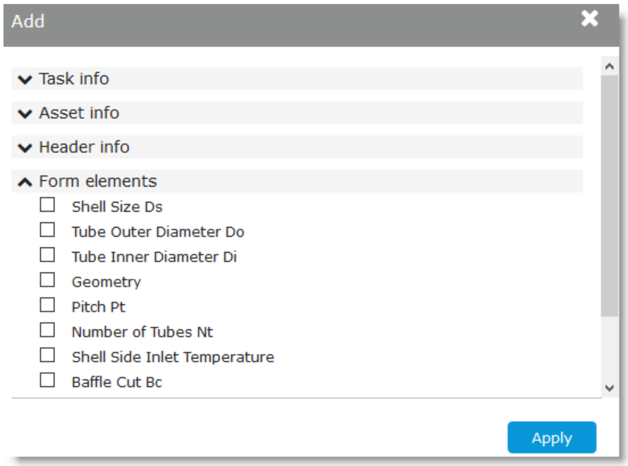
- Enter the Name of the Report in **Name**.
- Optional: Enter a description of the report in **Description.**
- Click on the **Form** tab then click **Select Report Forms** to open the form selection tool.



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



- 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

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 next 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.

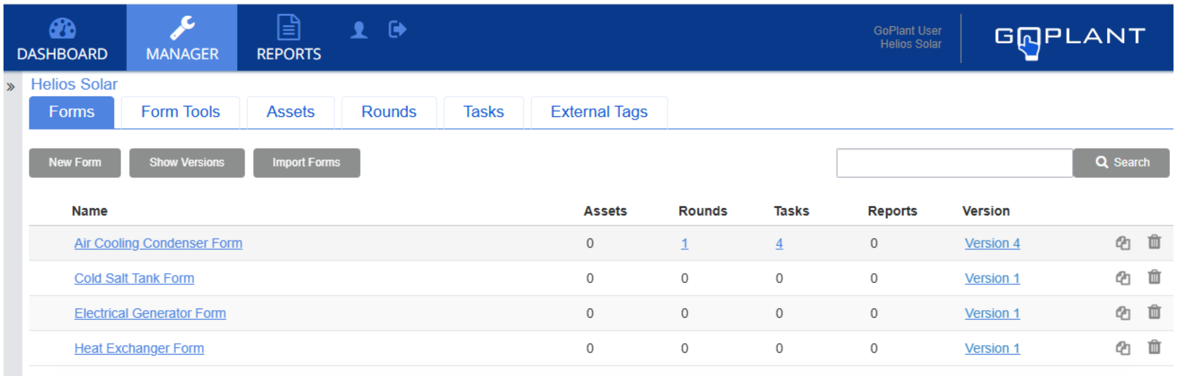
- Click on the **Data tab** to select the Horizontal and Vertical axis.
- Select the appropriate column you added to your report from the Horizontal **drop down** to define the horizontal axis.
- Select the appropriate Vertical option in **Computation**.
- Check to select the applicable Numeric columns 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

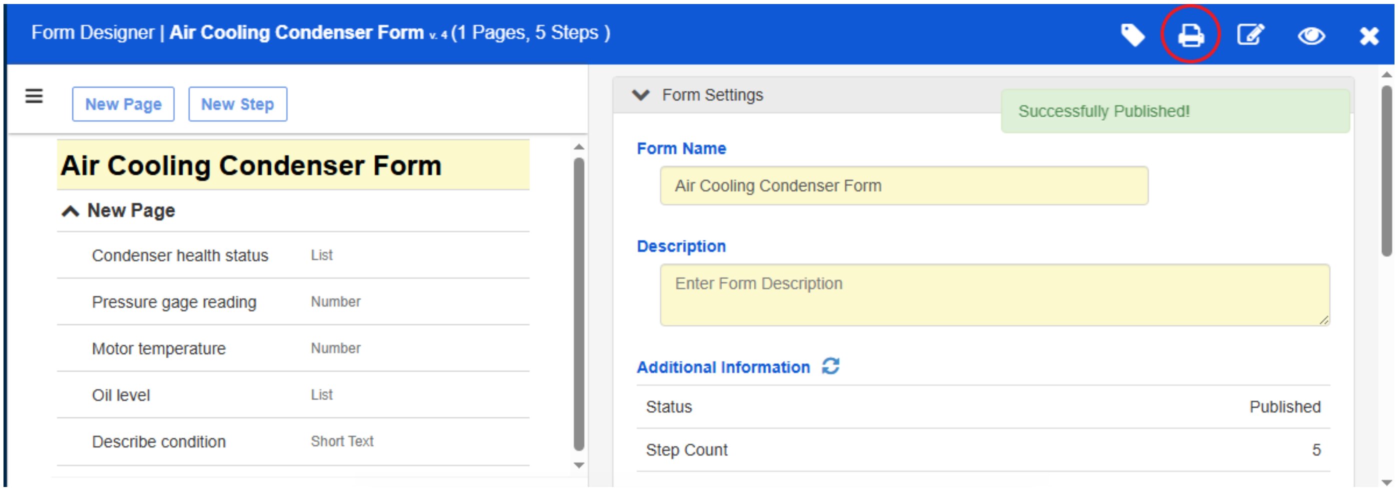
Print Blank Forms functions for Forms, Round, Assets and Tasks that allow operators to fill in the information via paper format. In case of mobile device failure or other issues, access to a website would allow them to print a blank Round that the operator could take on a clipboard and fill out. The 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

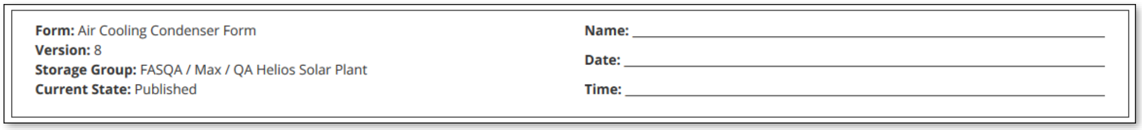
- Select the **Forms** Tab. The **Forms** page appears.



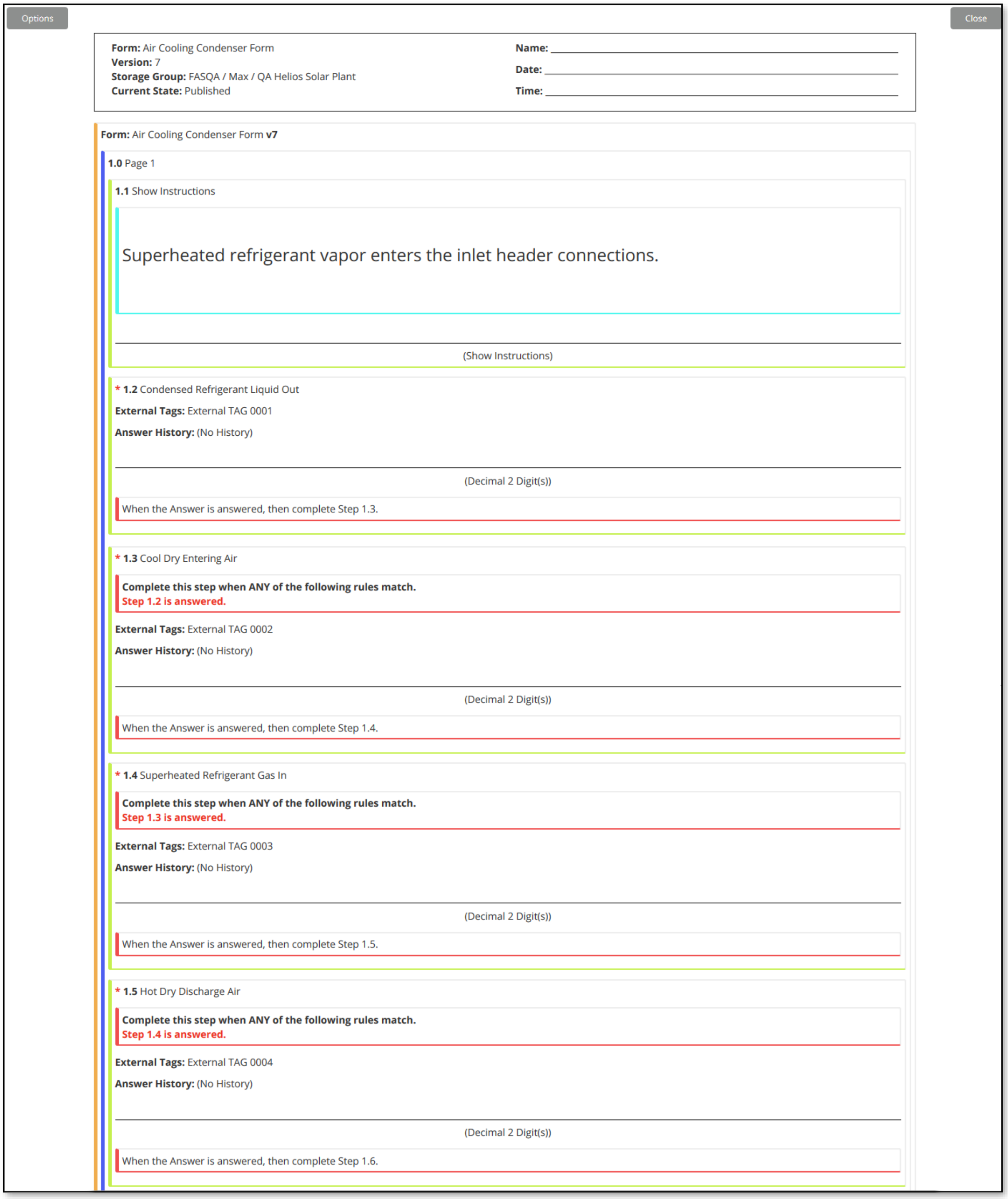
Click on the form name that you want to print to enter the form editor.



Within the editor, click 🖶 to print.



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.



Options

Close

Form: Air Cooling Condenser Form
Version: 7
Storage Group: FASQA / Max / QA Helios Solar Plant
Current State: Published

Name: ______________________
Date: ______________________
Time: ______________________

Form: Air Cooling Condenser Form **v7**

1.0 Page 1

1.1 Show Instructions

Superheated refrigerant vapor enters the 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 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.

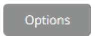
* **1.5** Hot Dry Discharge Air

Complete this step when ANY of the following rules match.
Step 1.4 is answered.

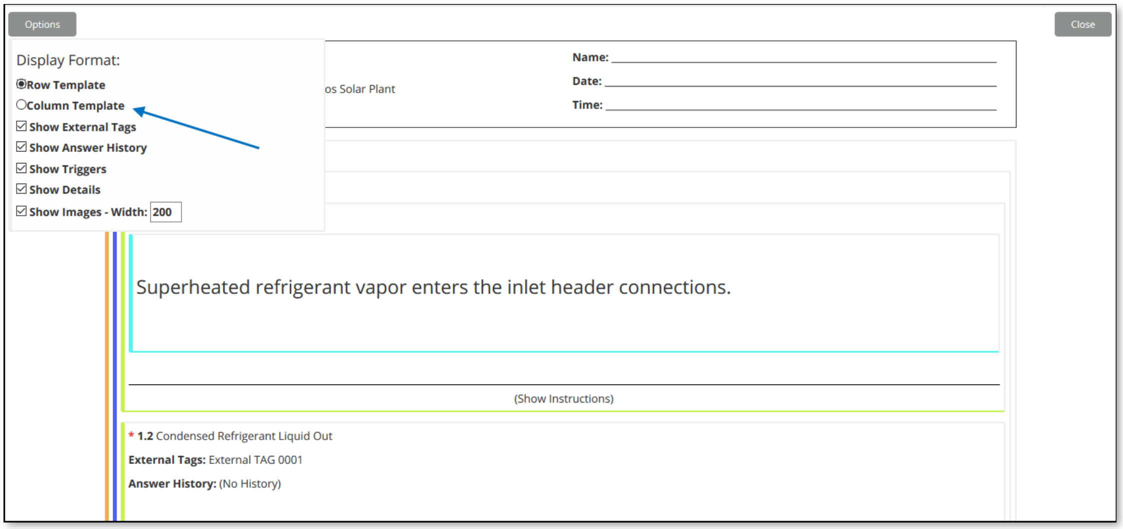
External Tags: External TAG 0004
Answer History: (No History)

(Decimal 2 Digit(s))

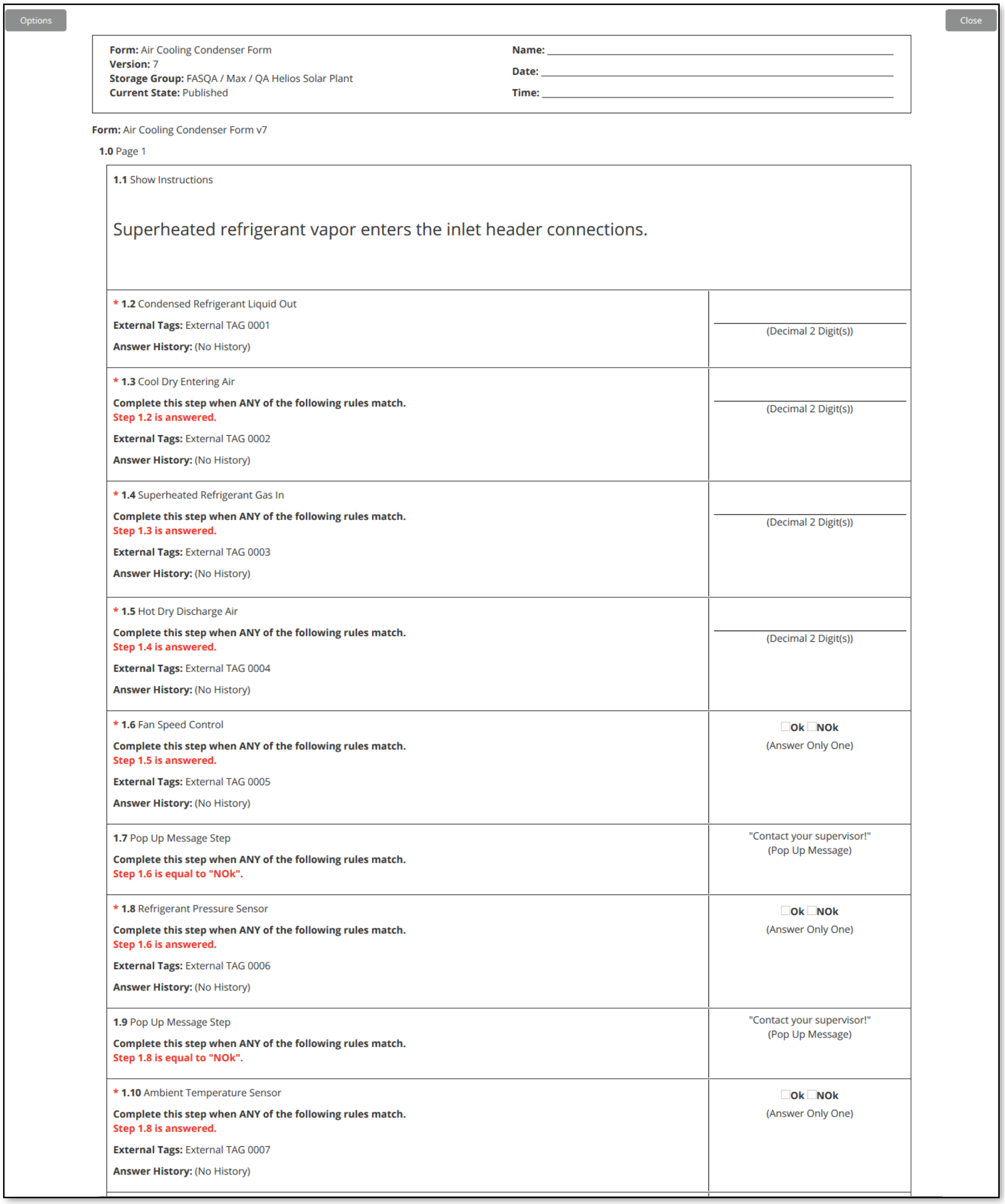
When the Answer is answered, then complete Step 1.6.

By default, the Display Format is loaded in Rows, moving the mouse over the options 

button, you have option to select the view in columns.



Move the mouse over options Options and check Column Template.



Options

Close

Form: Air Cooling Condenser Form
Version: 7
Storage Group: FASQA / Max / QA Helios Solar Plant
Current State: Published

Name: ____________
Date: ____________
Time: ____________

Form: Air Cooling Condenser Form v7

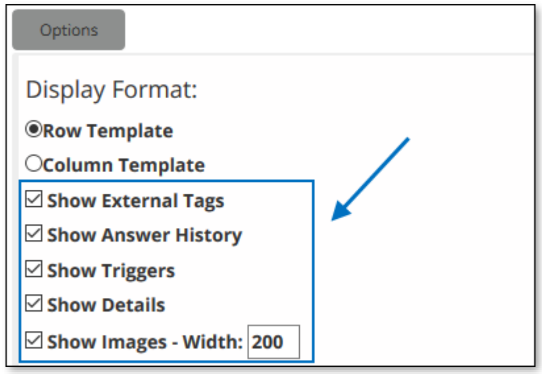
1.0 Page 1

1.1 Show Instructions

Superheated refrigerant vapor enters the inlet header connections.

* **1.2** Condensed Refrigerant Liquid Out **External Tags:** External TAG 0001 **Answer History:** (No History)	(Decimal 2 Digit(s))
* **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 Digit(s))
* **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))
* **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)	(Decimal 2 Digit(s))
* **1.6** Fan Speed Control **Complete this step when ANY of the following rules match.** **Step 1.5 is answered.** **External Tags:** External TAG 0005 **Answer History:** (No History)	☐**Ok** ☐**NOk** (Answer Only One)
1.7 Pop Up Message Step **Complete this step when ANY of the following rules match.** **Step 1.6 is equal to "NOk".**	"Contact your supervisor!" (Pop Up Message)
* **1.8** Refrigerant Pressure Sensor **Complete this step when ANY of the following rules match.** **Step 1.6 is answered.** **External Tags:** External TAG 0006 **Answer History:** (No History)	☐**Ok** ☐**NOk** (Answer Only One)
1.9 Pop Up Message Step **Complete this step when ANY of the following rules match.** **Step 1.8 is equal to "NOk".**	"Contact your supervisor!" (Pop Up Message)
* **1.10** Ambient Temperature Sensor **Complete this step when ANY of the following rules match.** **Step 1.8 is answered.** **External Tags:** External TAG 0007 **Answer History:** (No History)	☐**Ok** ☐**NOk** (Answer Only One)

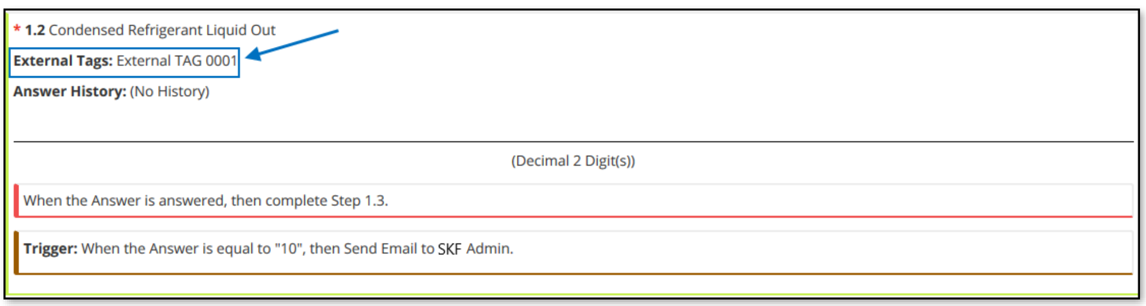
In addition to the view in columns and rows, the user can include additional options in the view as *(Show External Tags, Show Answer History, Show Triggers, Show Details, Images Width)*.



- 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

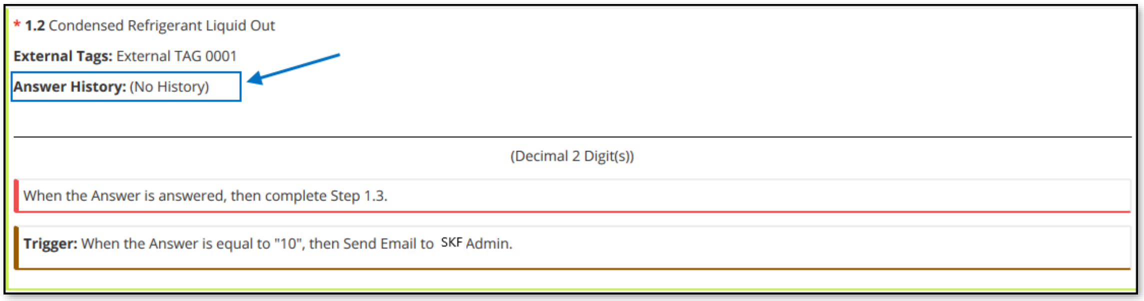


- Column Template

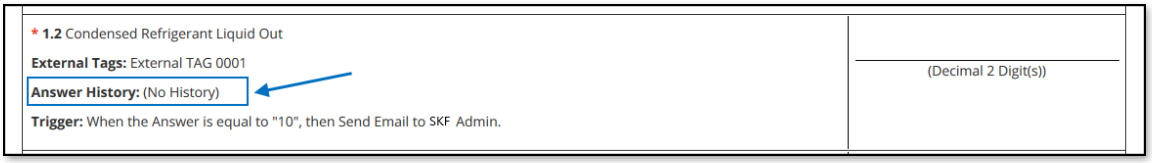
- Show Answer History

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



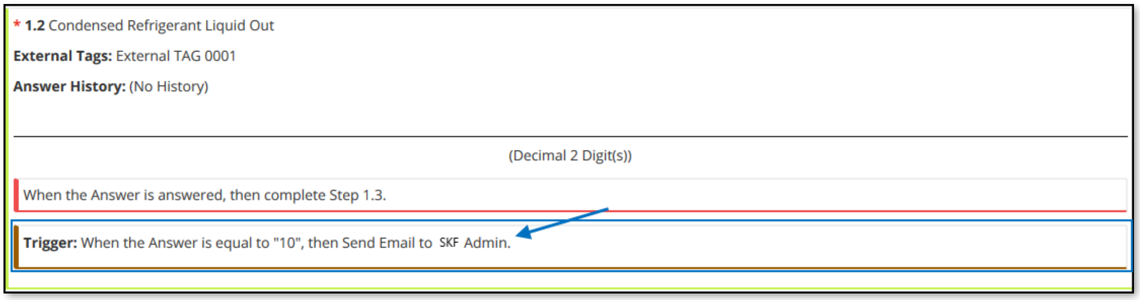
- Column Template



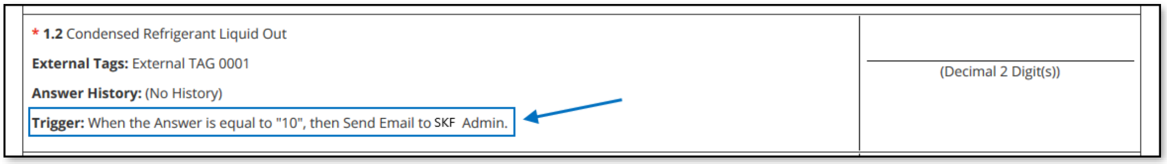
- Show Triggers

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



- Column Template

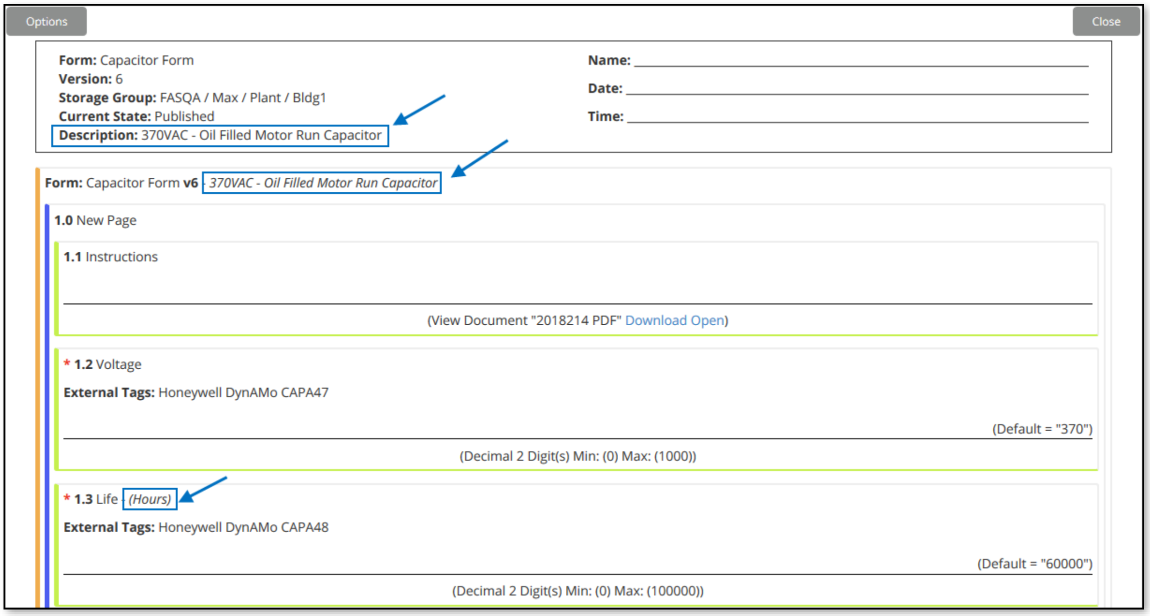


- Show Details

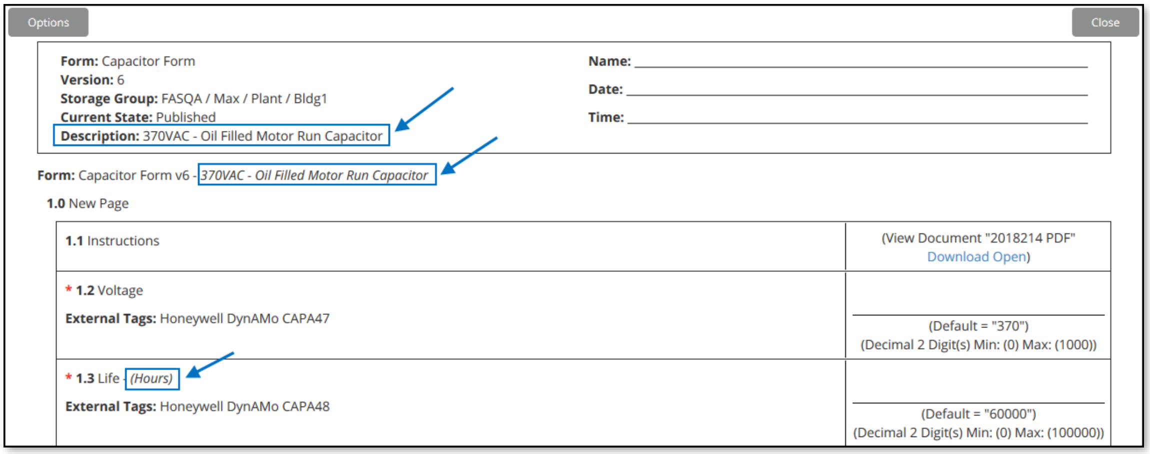
Show Details will show different information depending upon the user's choice to print the Form from Forms Tab, Assets Tab, Tasks Tab or Rounds Tab.

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

- Row Template



- Column Template

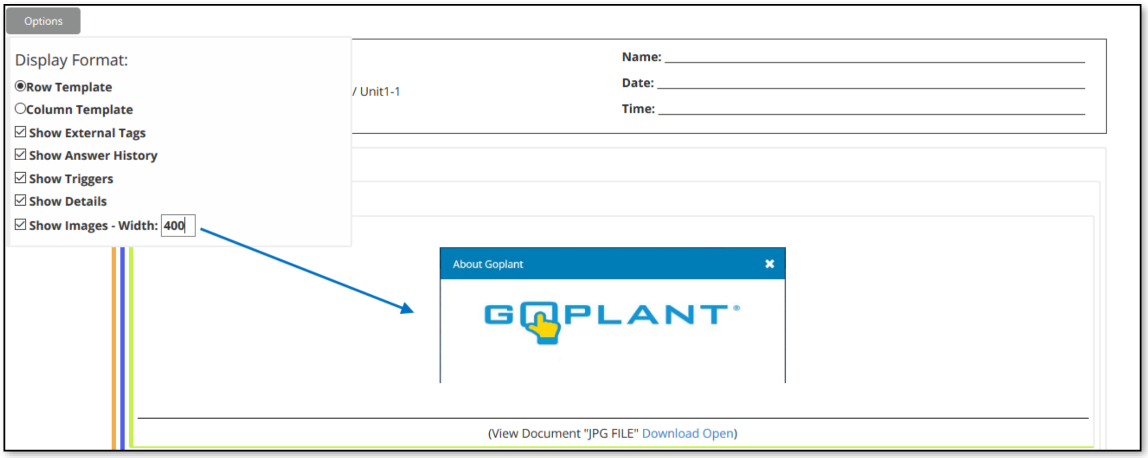


In the case that the blank form print is chosen from the other areas (Assets Tab, Tasks Tab or Rounds Tab) the display will show specific information of each choice.

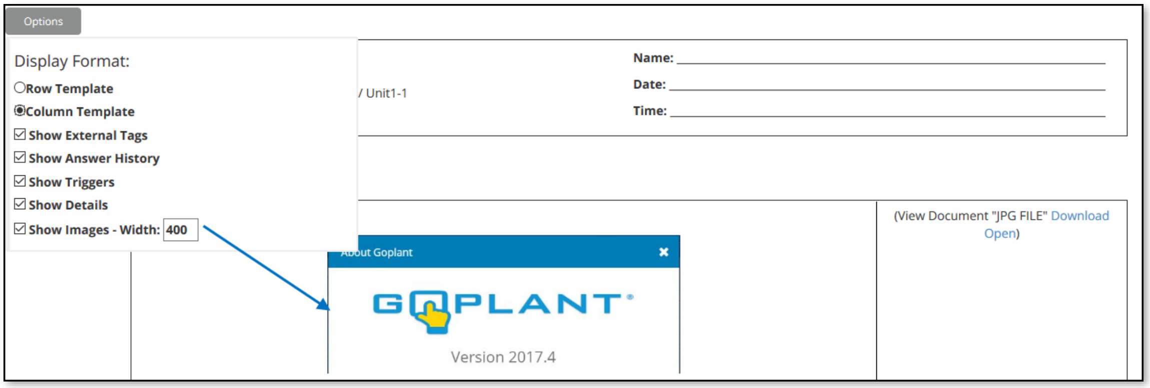
- Show Images – Width

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

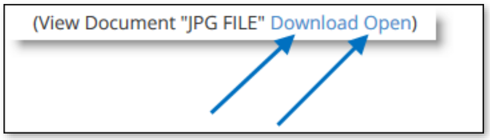
- Row Template



- Column Template

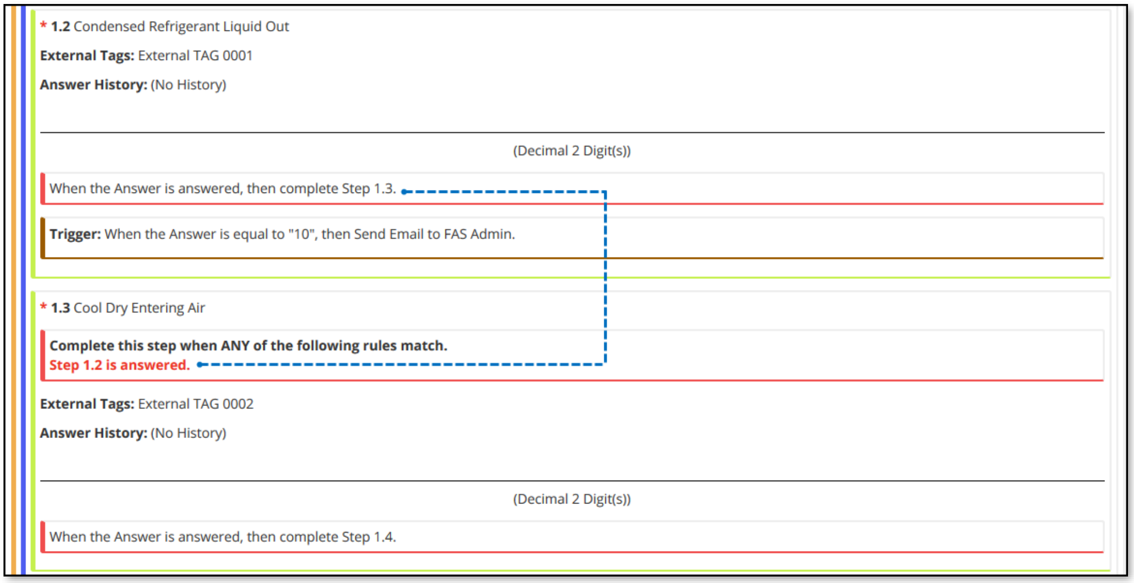


In both formats the user has the option to download or open the image, by clicking on Download or Open.

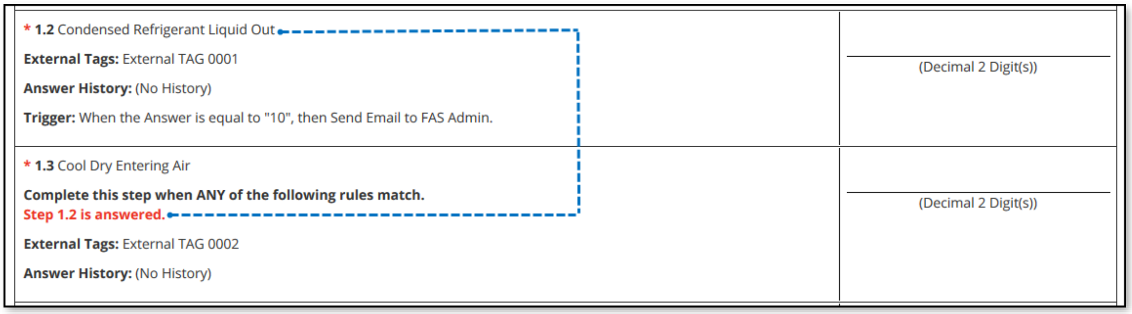


- **Visibility Rules**, each step created with visibility rule, will show the rule, to know if it is necessary or not to complete it.

  - Row Template

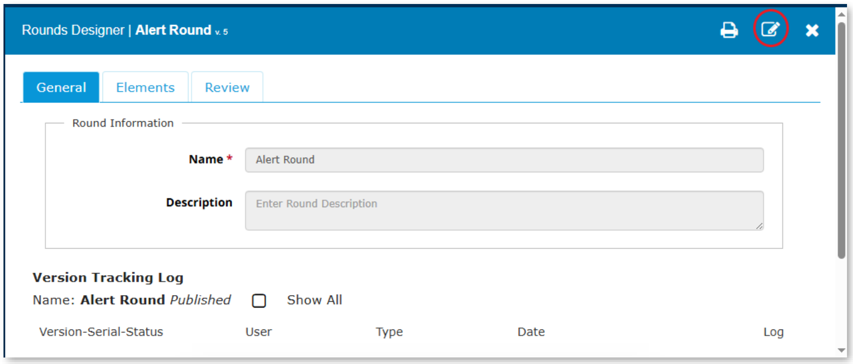


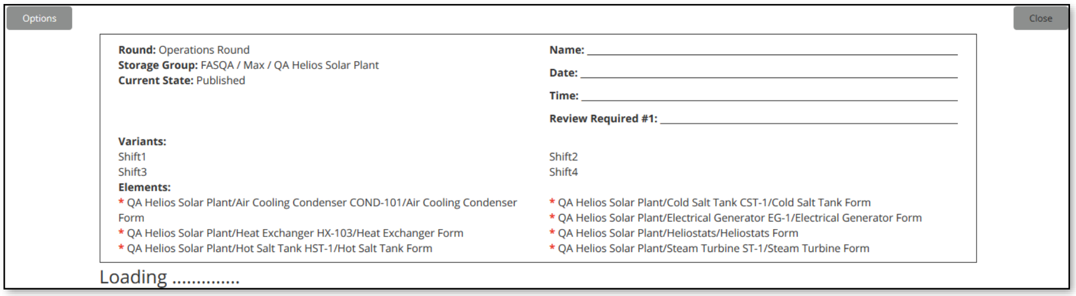
- Column Template



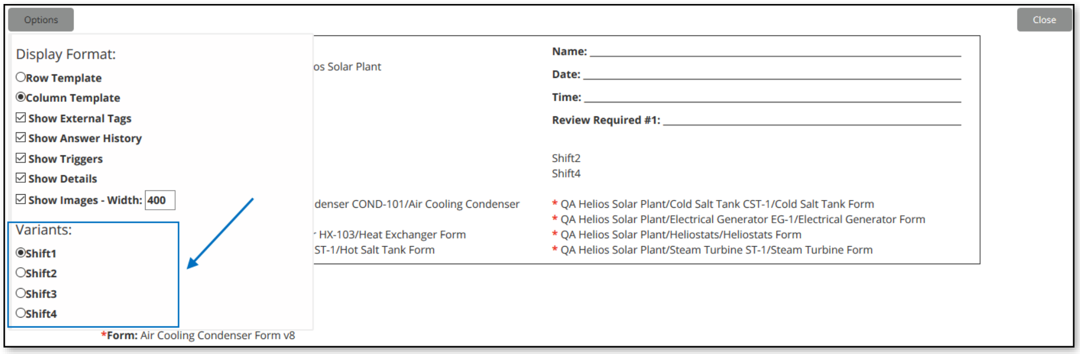
Print Blank Rounds

- Select the Rounds Tab, click on the round name to open the round designer. In the round designer, click on the print icon.





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.



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.

Round: Operations Round
Variant: Shift2
***Asset:** Air Cooling Condenser COND-101
***Form:** Air Cooling Condenser Form v8
1.0 Page 1

Round Element #1

1.1 Show Instructions

Superheated refrigerant vapor enters the inlet header connections.

* **1.2** Condensed Refrigerant Liquid Out **Answer History:** ("96.00", "78.00", "555.00", "444.00", "111.11", "333.33", "100.00") **Trigger:** When the Answer is equal to "10", then Send Email to FAS Admin.	(Decimal 2 Digit(s))
* **1.3** Cool Dry Entering Air **Complete this step when ANY of the following rules match.** **Step 1.2 is answered.** **Answer History:** ("6.00", "12.00", "222.00", "555.00", "222.22", "555.55", "200.00")	(Decimal 2 Digit(s))

***Asset:** Cold Salt Tank CST-1
***Form:** Cold Salt Tank Form v2
2.0 New Page

Round Element #2

* **2.1** Level **Answer History:** ("85.00", "66.33", "5.00", "56.00")	(Decimal 2 Digit(s))
* **2.2** Hot Water Flow In **Answer History:** ("45.00", "55.22", "45.00", "5.00")	(Decimal 2 Digit(s))
* **2.3** Hot Water Flow Out **Answer History:** ("69.00", "15.48", "14.00", "12.00")	(Decimal 2 Digit(s))
* **2.4** Cold Water Flow In **Answer History:** ("47.00", "26.65", "25.00", "2.00")	(Decimal 2 Digit(s))
* **2.5** Cold Water Flow Out **Answer History:** ("34.00", "33.00", "43.00", "4.00")	(Decimal 2 Digit(s))
* **2.6** Tempering Valve	☐**Ok** ☐**NOk** (Answer Only One)
* **2.7** Pump Flow - *l/min* **Answer History:** ("25.00", "22.33", "6.00", "8.00")	(Decimal 2 Digit(s))
* **2.8** Botton Temperature - *F* **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
3.0 New Page

Round Element #3

* **3.1** Frequency	☐**50Hz** ☐**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".**	(Text)
* **3.6** Fuel Tank Level **Answer History:** ("224.00", "256.00", "256.00", "452.00")	(Decimal 2 Digit(s))
* **3.7** Container	☐**20 Feet** ☐**40 Feet** (Answer Only One)

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