Administrator Manual

DataCollect

Administrative Tools
Supporting DataCollect (CMDT 3900) Version 3.0.0

User Manual P/N 15V-090-00054-100
Revision A

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1
Introduction

DataCollect Overview

DataCollect combines the intuitiveness of an iPad® or Android™ platform app with the power to customise a wide range of input types used for the documentation of audits, quality assurance, safety inspections, machine operator inspections, work orders and more.

A web interface allows companies to set up users with different access levels, and these users can then be combined into groups. Business process steps walk users through various forms and questions. Data collection progress is easy to view in both the web interface and on mobile devices. It is simple for users to add photos, notes and audio recordings to their observations – and all the data can be quickly uploaded and securely stored in the safety of the SKF cloud. DataCollect is a powerful tool not only for *process* and *inspection* data collection, but also for recording *vibration measurement* data. When used in conjunction with the SKF QuickCollect sensor, it is quick and easy for an operator to take machine vibration readings using the app.

DataCollect provides instant reporting features, which enable fast feedback to decision-makers in your organisation.

- You can even work with your SKF @ptitude Analyst ROUTEs in DataCollect and export collected data directly to SKF Cloud-hosted instances of @ptitude Analyst! Contact your SKF representative to learn more.

How DataCollect Works

With DataCollect, an administrator first builds each necessary form using Form Builder or an Excel®-based template (a baseline template with examples is provided). Next, that administrator saves the form (from Form Builder) or uploads the completed form templates to the DataCollect web interface, where they publish the forms and add them to a process.

The users in one or more user groups have access to the process and can collect data to the process forms via their mobile devices as appropriate. If an administrator updates a process, its steps or its forms, the software will make the updates available for download by the users immediately. Similarly, the data collected by each user will flow back to the web interface for analysis and reporting. Meanwhile, the users are ready to generate reports directly from their mobile devices.

1. The administrator creates a form in Form Builder or uploads a completed Excel template to the DataCollect web interface.
2. In the web interface, the administrator associates the form with one or more processes and groups that have been established.
3. Within minutes, operators in the applicable group(s) can load the processes and begin collecting data via their devices.
4. The app sends the data back to the web interface, where it can be compiled and analysed.
5. Ultimately, operators generate reports from within the DataCollect app on their device and administrators work with collected data via the web interface.

DataCollect Structure

Process – a series of steps a user must follow to complete a data collection task in the DataCollect app; an administrator creates each process and defines its steps via the DataCollect web interface.

Work Order – a single instance of a specific process; an administrator can create multiple work orders based on a single process

Step – a subdivision of a process; each step is comprised of a set of forms (or collections)

Form – a set of DataCollect questions created in Form Builder or an Excel spreadsheet that has been constructed to define a set of DataCollect questions and uploaded to the web interface

Collection – a single instance of a specific form; each collection is comprised of a set of questions

Question Category – a grouped set questions within a form (or collection)

Question – the individual element for which a specific data collection entry or selection must be completed

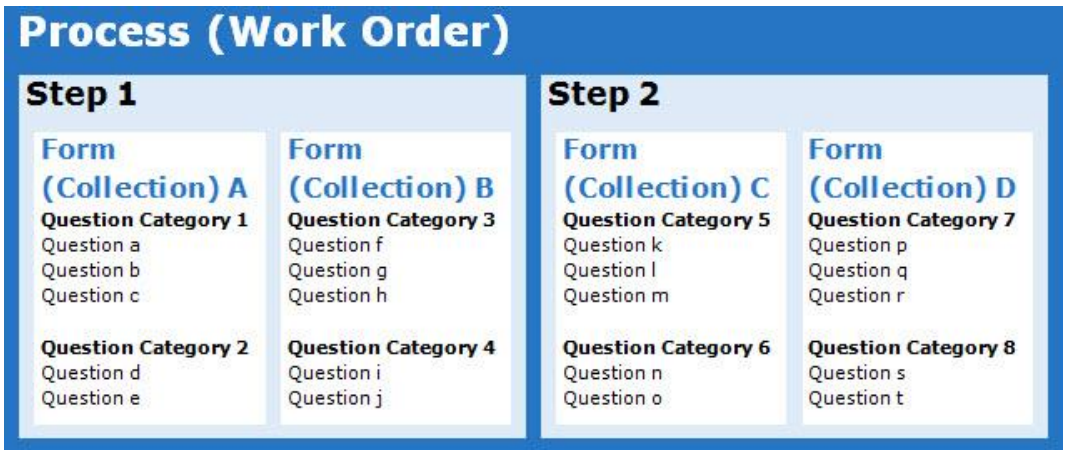


Figure 1 - 1.
DataCollect Structure.

About this Manual

This manual provides information on the DataCollect web interface, a tool used in conjunction with the DataCollect CMDT 3900 iOS and Android apps as described above.

As you read this manual, you will discover certain text conventions:

Bold type indicates text (or a button) that appears in a menu, window or dialogue box.

Italics emphasise important information.

➢ indicates a note to the reader.

Step-by-step procedures are sequenced with bullet points, •.

Underlined hyperlinks take you to referenced locations within this document or external websites. Some hyperlinks bring up an email window for the purpose of contacting SKF.

User Manual Outline

In this user manual, we will describe first how to get started with DataCollect. We will then present details of the DataCollect form template. Finally, we will discuss the administrative tasks performed in the web interface.

Chapter 2, Getting Started provides instructions on how to download, install and launch the DataCollect app, how to create an account, and how to log into both the app and the web interface.

Chapter 3, Web Interface explains how to navigate the DataCollect web interface to create new user groups and invite colleagues to join, create (upload) and manage forms, create and manage processes, and assign work orders based on these processes.

Chapter 4, Form Builder introduces DataCollect forms by highlighting the most common features of Form Builder and discussing how those features are displayed in the DataCollect app.

Chapter 5, Form Template introduces DataCollect forms by highlighting the most common features of the Excel based template and discussing how those features are displayed in the DataCollect app.

Appendix A, SKF @ptitude Analyst ROUTEs and DataCollect describes how to assign SKF @ptitude Analyst ROUTEs for operators to complete in the DataCollect app and how to review the data returned to @ptitude Analyst after ROUTE data collection.

Appendix B contains the SKF software end-user license agreement.

Supported Devices and Browsers

SKF supports DataCollect on iPad Air and iPad Mini devices as well as several Android platform devices.

IMPORTANT: Before you purchase a device for use with DataCollect, speak to your SKF representative or contact apps@skf.com to confirm that it is a supported device type and has the correct Bluetooth® chip.

The web interface is optimised to run in a Google Chrome™ browser. All instructions provided are for a Google Chrome browser; experiences in other browsers may vary.

Technical Support

If you have questions or support issues regarding DataCollect, please email mailto:apps@skf.com.

For application download support, please email mailto:skf.it.service.desk@skf.com.

2
Getting Started

Create an Account by Responding to an Invitation Email

Before you can work in DataCollect, you must respond to an invitation email from DataCollect.

To create an account by responding to an invitation email:

- Access your email account, open the message DataCollect has sent and click the **Accept Invitation** link. The DataCollect web interface will launch and display a **Create user account** page.

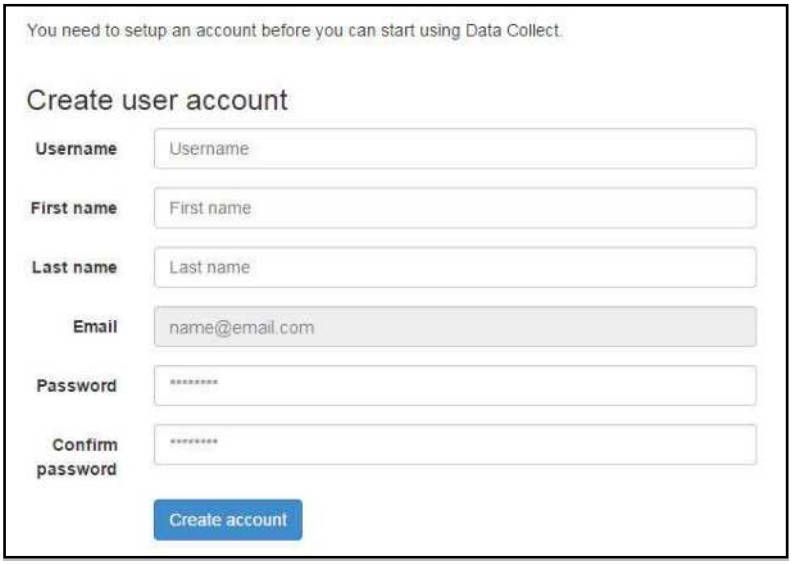


Figure 2 - 1.
Create User Account Page.

- Create a **Username**, enter your **First name** and **Last name**, and create and confirm a **Password** (minimum of 5 characters).
- Click **Create account**. An updated account verification page will appear, after which the screen will refresh and the web interface **Login** page will appear.

You may now log into the DataCollect web interface, as discussed below. You may also log into the DataCollect app, if necessary.

Log into DataCollect Web Interface

The DataCollect web interface is available at datacollect.skf.com.

IMPORTANT: The web-based system is optimised to run in a Google Chrome™ browser. All instructions provided are for a Google Chrome browser; experiences in other browsers may vary.

To log into your account:

- Go to DataCollect at datacollect.skf.com. The **Login** page will appear.

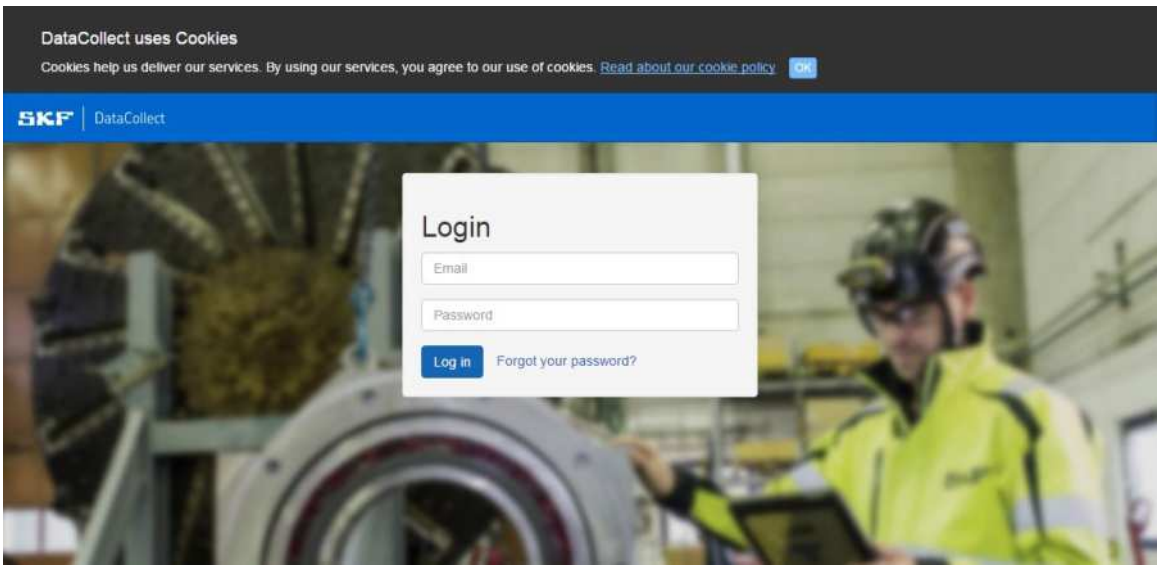


Figure 2 - 2.
The **Login** Page.

- On the **Login** page, enter your account **Email** and **Password**.
- Click **Log in**. The DataCollect web interface will load.
  - ➢ You must access the web interface and the app (if necessary) with the same user credentials.

IMPORTANT: DataCollect uses cookies. By using DataCollect, you agree to SKF's use of cookies as per the policy accessible via this Login page.

To reset your password:

- On the **Login** page, click the **Forgot your password?** hyperlink. The **Enter your email to receive a reset link** prompt will appear.
- Enter your account **Email** and click **OK**. The site will send you an email with a password reset link. Follow the instructions provided.

3
Web Interface

Web Interface Overview

In the web interface, you can create a form, then upload any supporting image files, publish the form and associate it with one or more user processes that you define. Ultimately, the user processes are associated with specific groups and then assigned to operators via work orders.

The web interface is also where you define user groups and manage individual user and administrator permissions.

The DataCollect web interface is available at datacollect.skf.com.

IMPORTANT: The web-based system is optimised to run in a Google Chrome™ browser. All instructions provided are for a Google Chrome browser; experiences in other browsers may vary.

Typical Workflow

The following steps illustrate a typical ongoing workflow within the web interface. Note that the order in which one performs some of these steps may vary slightly.

Step	Where to find in this chapter
1. Create a new user group	Configure Groups in the Groups View
2. Invite colleagues to join the user group	Configure Groups in the Groups View
3. Create forms (in Form Builder or Excel)	Create Forms in the Forms View
4. Upload accompanying form assets (images)	Create Forms in the Forms View
5. Create a new process	Define Processes in the Processes View
6. Create new steps in the process	Define Processes in the Processes View
7. Associate forms with each process step	Define Processes in the Processes View
8. Publish the process	Define Processes in the Processes View
9. Associate the process with a user group	Configure Groups in the Groups View
10. Create a work order to assign the process to a user group.	Create Work Orders in the Work Orders View

- As an alternative to the complete workflow described above, you may need to assign individual forms (standalone collections) to a group, independent of processes, steps, etc.

Basic Navigation

Once you are signed into the web interface, you have access to the six DataCollect views:

Overview – Manage company name and description, adjust system-wide user login and form creation settings, and invite and manage users.

Groups – Create and manage user groups, invite colleagues to join groups, associate processes and forms with groups, review group work orders and collected data, and generate reports.

Processes – Create and manage processes, including the definition of steps in the process and assignment of forms to those steps.

Forms – Create forms in Form Builder, upload Excel-based form templates, update and manage existing forms, and upload associated image files. Company administrators always have access to this view. Group administrators only have access to this view if **Allow group admin to create form** is set to "On".

Work orders – Create the work orders from which users will initiate data collection within the app and from which the team will ultimately generate reports within the web interface.

Reports – Download monthly audit reports or generate and send company group reports.

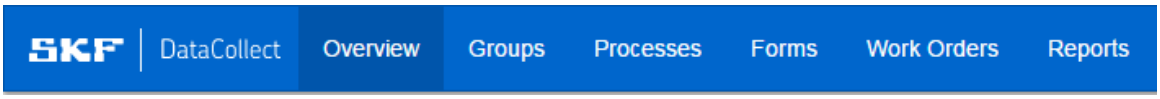


Figure 3 - 1.
DataCollect Views.

➢ The settings icon/button is located to the right of the DataCollect view options. Click this button to access the **Settings** screen.

The remainder of this chapter explains the functionality of the above views.

Settings Screen

Click the settings icon/button to the right of the DataCollect view options to open the **Settings** screen.

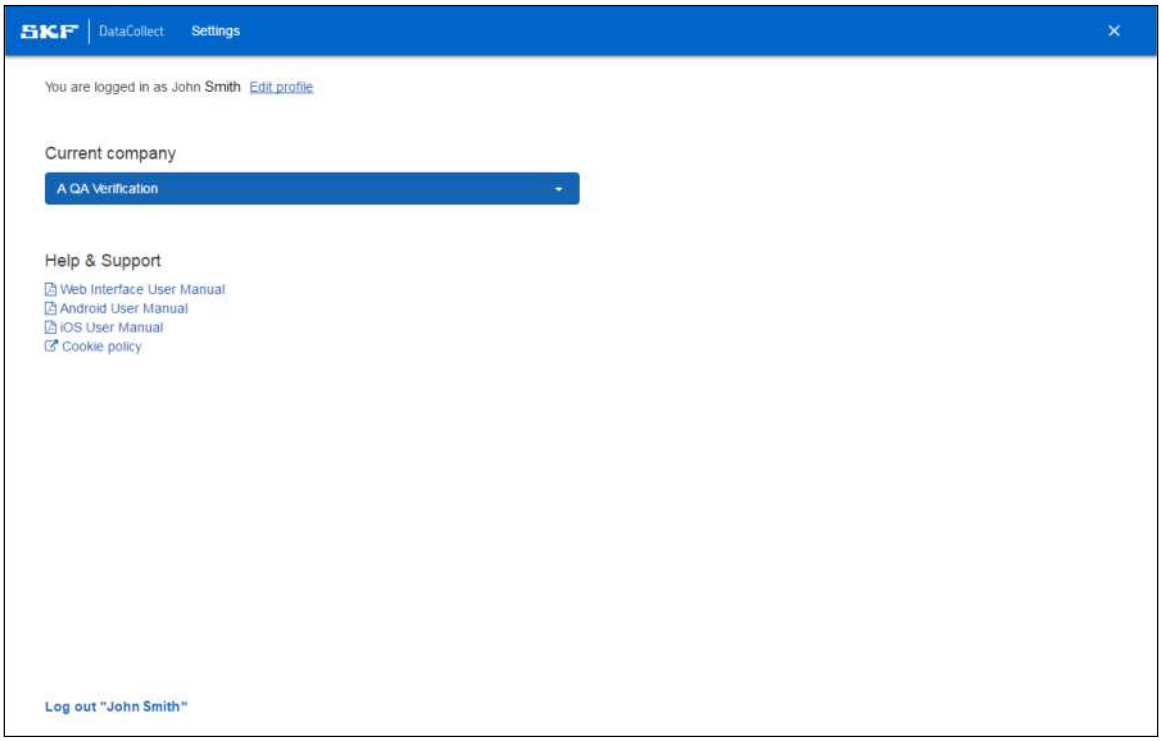


Figure 3 - 2.
Settings Screen.

To update your user profile:

- Click the **Edit profile** link next to your name at the top of the screen. The **Edit profile** area will be displayed.

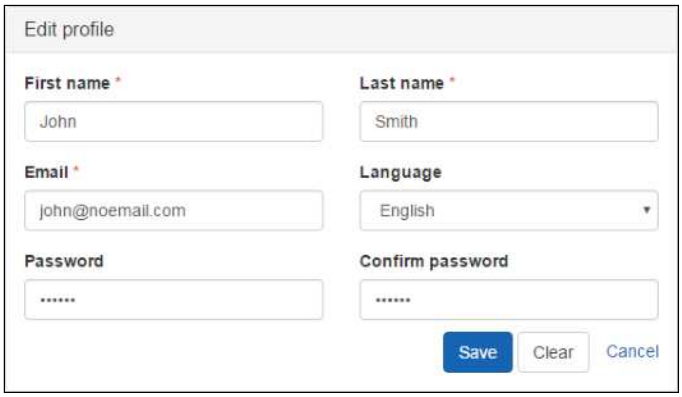


Figure 3 - 3.
Edit profile Area.

- Update the necessary profile elements and click **Save**.
- Click the close (x) button in the top right corner of the screen to exit **Settings**.

To change the company with which you are working:

- Click the **Current company** drop-down list box and select the appropriate company from the resulting list.

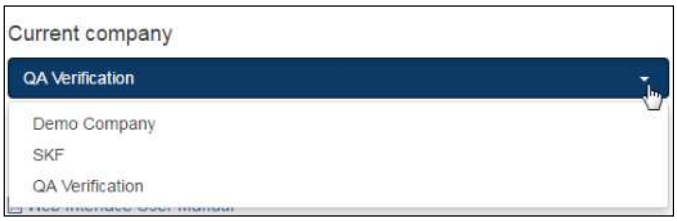


Figure 3 - 4.
Current company Drop-Down List Box.

- Click the close (x) button in the top right corner of the screen to exit **Settings**.

To log out:

- Click the **Log out "<name>"** link at the bottom of the screen.

Figure 3 - 5.
Log out Link.

Configure Company and Users in the Overview View

In the **Overview** view, you can update the company name and description, adjust company settings and manage custom report templates. Here you can also invite and manage the company's DataCollect users.

Click the **Overview** button at the top of the web interface to display the **Overview** view.

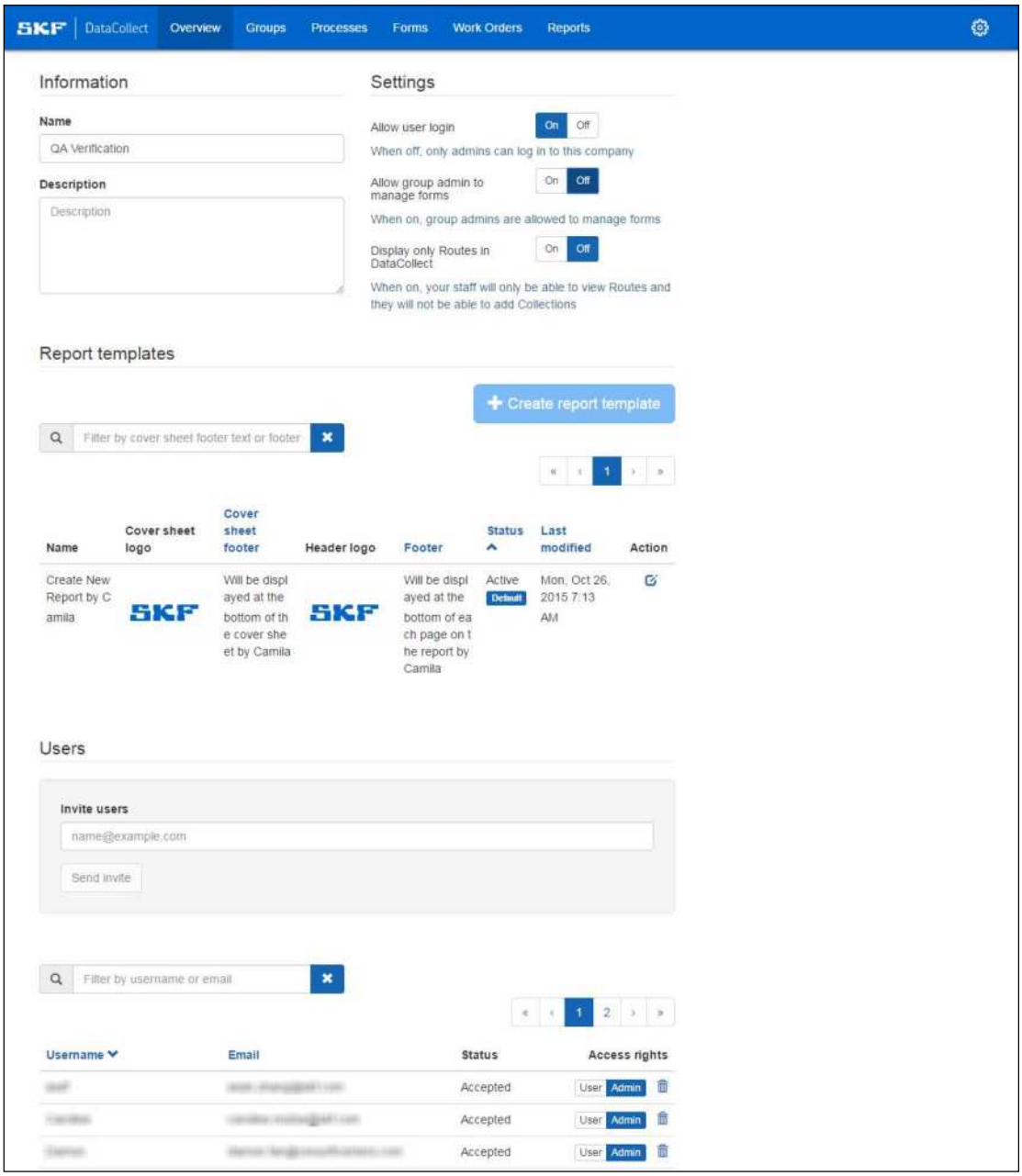


Figure 3 - 6.
The **Overview** View.

The **Overview** view contains the following elements:

Name – allows entry and editing of the company name.

Description – allows entry and editing of a detailed company description.

Allow user login – when "On" is selected, all company users can log into the company; when "Off" is selected, only company administrators can log into the company.

Allow group admin to create form – when "On" is selected, group administrators can create new forms; when "Off" is selected, only company administrators can create new forms.

Display only Routes in DataCollect – when "On" is selected, all company operators will have access to @ptitude Analyst ROUTE mode only. Hence **Routes** will be displayed as **Work Orders** and **Collections** (and **Add a collection**) will be disabled.

Report templates – enables creation and management of custom report templates for the company.

Create report template button – facilitates creation of a custom report template; click to expand a **Create report template** form area.

Report templates filter – limits the list to include only those report templates with cover sheet footer text or general footer text that contains the exact string entered.

Report templates list – displays all current report templates for the company.

Name – displays the report template name

Cover sheet logo – displays each report template's cover sheet logo

Cover sheet footer – displays each report template's cover sheet footer text; click heading to toggle sort by cover sheet footer in ascending/descending order.

Header logo – displays each report template's header logo.

Footer – displays each report template's general footer text; click heading to toggle sort by footer in ascending/descending order.

Status – displays each report template's status; "Active" indicates that the report template is available for use; "Disabled" indicates that the report templates is not available for use; a **Default** icon appears in this column for the default report template; click heading to toggle sort by status in ascending/descending order.

Last modified – displays each report template's last modified date and time; click heading to toggle sort by last modified date and time in ascending/descending order.

Action – displays an edit button for each report template; click the button to expand the **Edit report template** form area.

Invite users (and **Send invite** button) – enables new DataCollect user invitations via email.

Users filter – limits the list to include only those users whose usernames or emails contain the exact string entered.

Users list – displays all current DataCollect users within the company.

Username – displays the user's username; click heading to toggle sort by username in ascending/descending order

Email – displays each user's email; click heading to toggle sort by email in ascending/descending order

Status – displays each user's status; "Accepted" indicates that the user has accepted the invitation to DataCollect; "Not Accepted" indicates that the user has not accepted the invitation to DataCollect

Access rights – displays each user's rights within the company's instance of DataCollect:

User – extends the user rights to access their own forms (collections) within the company only.

Company **Admin** – extends the user rights to access all users' forms (collections) within the company. The user can also manage the company's **Overview**, **Groups**, **Processes**, **Forms** and **Work orders**. A company can have several administrators, but it is recommended that a company have as few administrators as possible to ensure a consistent operation.

Delete icon – removes the user from the company.

Update the Company Name and Description

To update the company Name or Description:

- Edit or enter text as desired in the appropriate text box.

Create and Manage the Company's Custom Report Templates

You can create custom report templates with logos and text that you provide in this area. If you do not create a custom report template, default SKF logos and footer text will appear on all reports that you generate.

When you generate reports from within the app, it will use the report template set as the default here. When you generate reports from the web interface, you can select any report template that you wish to use.

To create a report template:

- Click the Create report template button. The Create report template form area will expand.

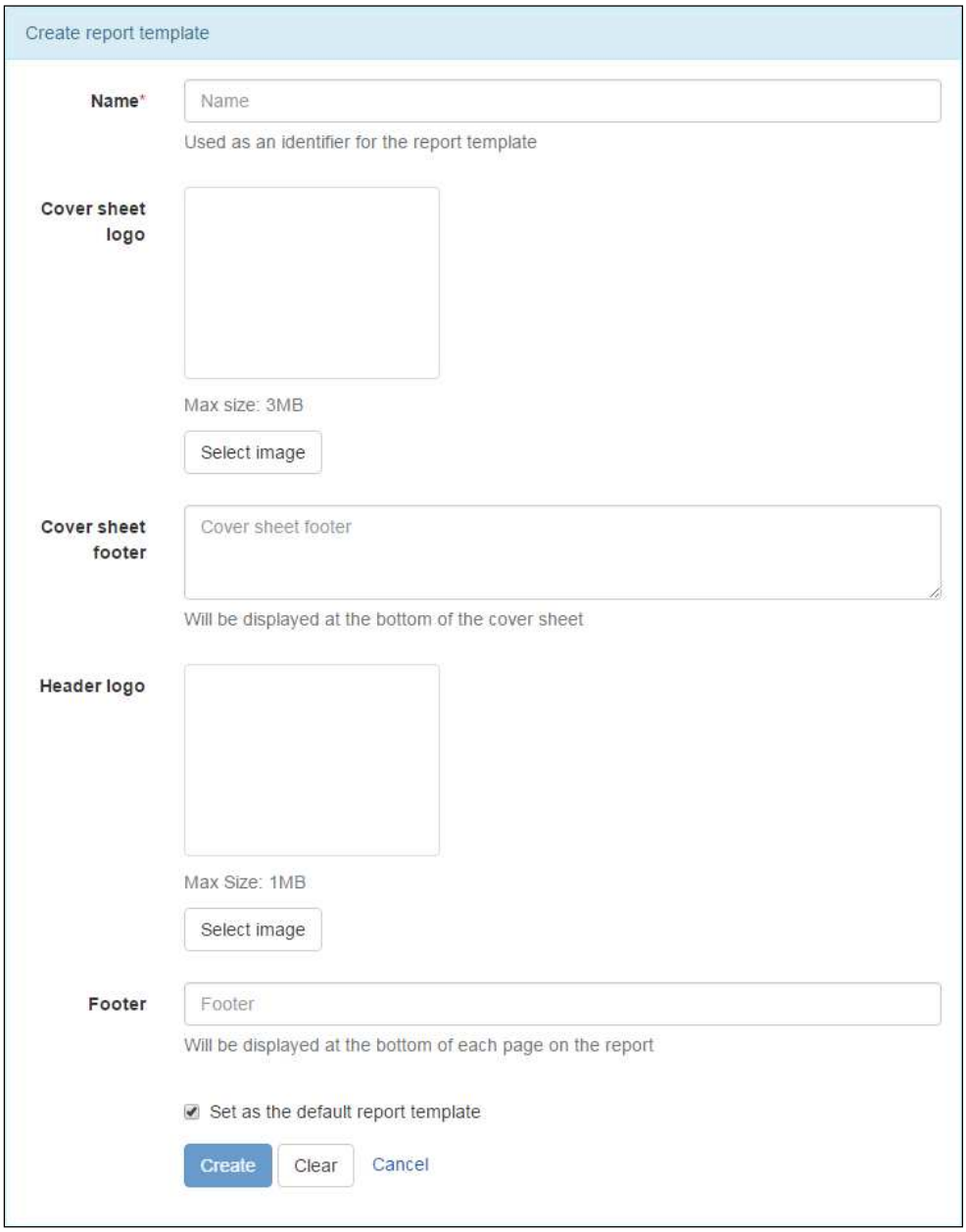


Figure 3 - 7.
The **Create Report Template** Form Area.

- Enter a unique identifying **Name** for the new report template.
- Click **Select image** to find and upload a **Cover sheet logo** as appropriate. The recommended aspect ratio is 4:3, and the maximum file size is 3 Mb.
- Enter **Cover sheet footer** text as appropriate.

- Click **Select image** to find and upload a general **Header logo** as appropriate. The recommended aspect ratio is 17:3, and the maximum file size is 1 Mb.
- Enter general **Footer** text to appear on all pages excluding the cover, as appropriate.
- Select (check) the **Set as the default report template** checkbox if this template is to be the default for the company. When you generate reports from within the app, it will use the report template specified as the default.
- Click **Create**. The new custom report template will now appear in the Report templates list.

To edit a report template:

- Click the **Edit** button in the Report templates list **Action** column for the report template that you intend to edit. The **Edit report template** form area for that template will expand.

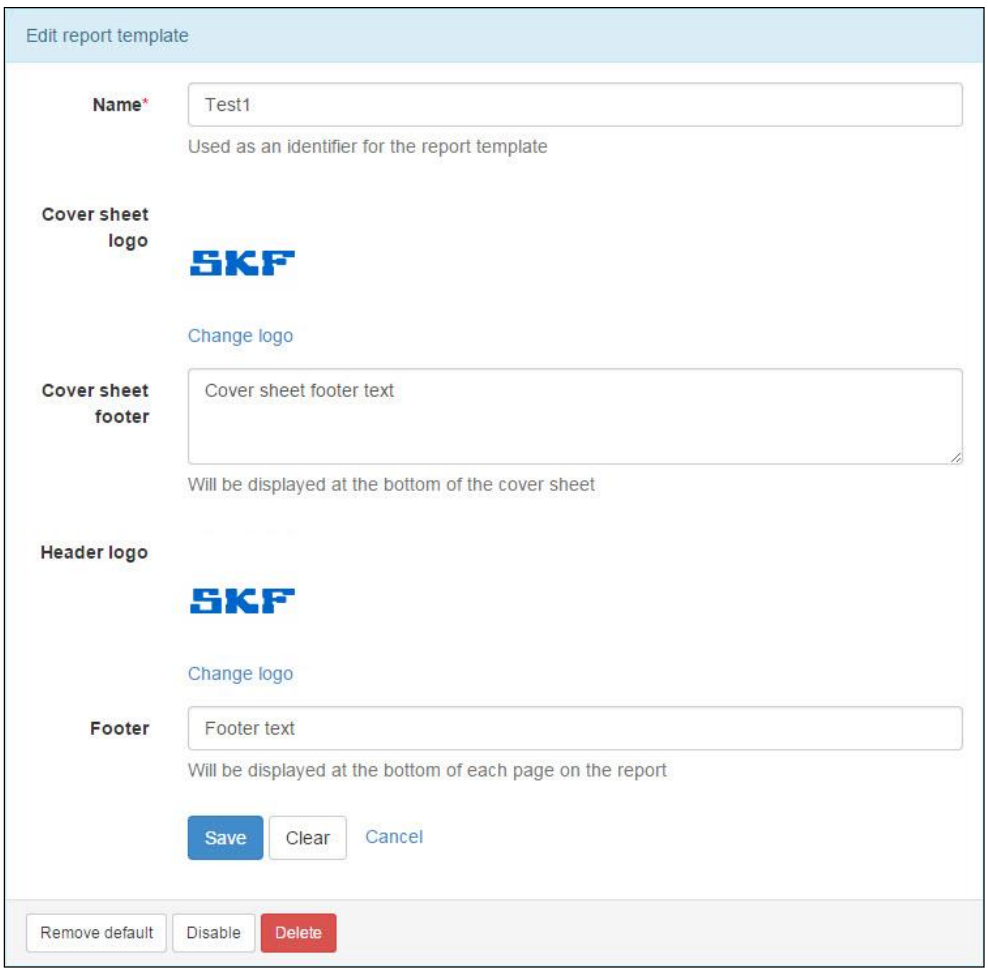


Figure 3 - 8.
The **Edit Report Template** Form Area.

- Edit the template's **Name**, **Cover sheet footer** or **Footer** text as necessary and/or click **Change logo** beneath either logo to locate and upload a new logo.

- ➢ Alternatively, you may click **Clear** to clear all fields and enter new text or select new logos.
- ➢ Click **Cancel** to cancel editing.

To remove a report template's status as the default template:

- Click the **Edit** button in the Report templates list **Action** column for the report template that you intend to change. The **Edit report template** form area for that template will expand.
- Click **Remove default**. This template will no longer be the default for the company.

To disable a report template:

- Click the **Edit** button in the Report templates list **Action** column for the report template that you intend to disable. The **Edit report template** form area for that template will expand.
- Click **Disable**. This template will no longer be available for use.

To activate a disabled report template:

- Click the **Edit** button in the Report templates list **Action** column for the report template that you intend to activate. The **Edit report template** form area for that template will expand.
- Click **Activate**. This template will now be available for use.

To delete a report template:

- Click the **Edit** button in the Report templates list **Action** column for the report template that you intend to delete. The **Edit report template** form area for that template will expand.
- Click **Delete** to remove the report template from the company in DataCollect.

Invite and Manage the Company's DataCollect Users

To invite a new user to DataCollect:

- Type the new user's full email address in the **Invite users** text box and click **Send invite** or press **Enter**. A prompt will appear, asking whether you wish to send a company invite mail to the email address that you have indicated.
- Click **OK**. DataCollect will send the new user a company invite email.
  - ➢ The invited user must click the **Accept invite** link in the invite email that they receive. Refer to the **Status** column to determine whether they have **Accepted** or **Not Accepted** the invite.

To invite an existing user to the current company:

- Type the user's full email address in the **Invite users** text box and click **Send invite** or press **Enter**. A prompt will appear, asking whether you wish to send a company assignment message to the email address that you have indicated.
- Click **OK**. DataCollect will send the new user a company assignment email.
  - ➢ The **Status** column already shows **Accepted** because the user has already accepted an invitation to DataCollect.

To manage a user's Access rights within the current company:

- To the right of each user name and email address, click the appropriate **Access rights** option, **User** or **Admin**.

To delete a user from the current company:

- Click the delete icon to remove the user from the company in DataCollect.

Configure Groups in the Groups View

In the **Groups** view, you can create and manage new user groups, invite colleagues to join the groups, and associate processes and forms with the groups. Here you can also review work order progress, view collected data and generate reports.

Click the **Groups** button at the top of the web interface to display the **Groups** view.

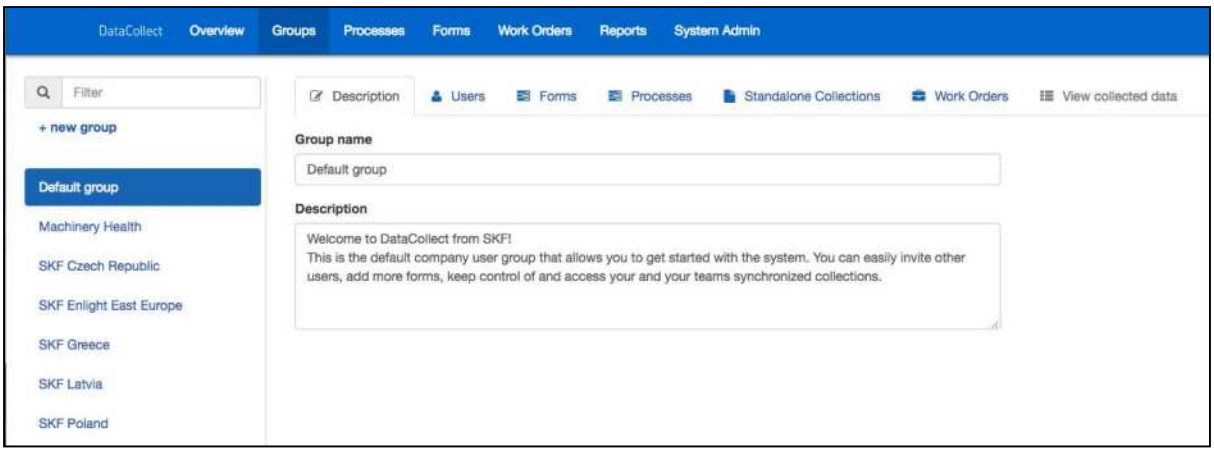


Figure 3 - 9.
The **Groups** View.

The **Groups** view contains the following elements:

Filter – limits the Groups list to those with group names containing the text entered.

+ new group – creates a new group.

Groups list – lists all groups within the company.

When you click on a group, it will load with the following tabs (described in greater detail later in this section) available in the view's primary work area:

Description – facilitates identification of the group and allows deletion of the group.

Users – enables addition of users to the group and displays the users' access rights.

Forms – facilitates management of forms used by the group.

Processes – facilitates management of processes used by the group.

Standalone Collections – provides insight into the progress of collections that are not associated with the group's work orders and facilitates reporting of collected data.

Work orders – provides insight into the group's work order progress and facilitates reporting of collected data.

View collected data – accessed initially via the **View data** button on either the **Standalone Collections** or the **Work orders** tab. Facilitates review of collected data and report generation.

Create a Group

To create a new group:

- Click the **+ new group** button. A new group will appear in the groups list and the group will load automatically in the screen's primary work area with the **Description** tab displayed.
    - ➢ The following pages describe the steps necessary for your newly added group, which has already been loaded in the primary work area. You can select this or any other group from the groups list at any time to make updates to its properties on these same tabs.

Manage a Group

Description tab

The **Description** tab displays the identity of the selected group. You can enter or edit the **Group name** and **Description** or delete the group.

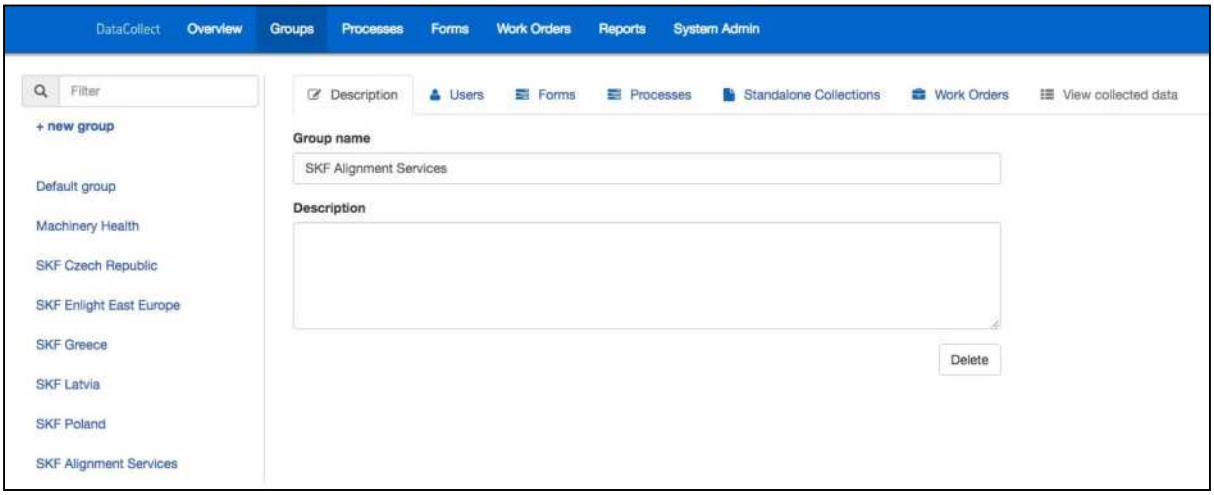


Figure 3 - 10.
The **Groups** View's **Description** Tab.

The **Description** tab contains the following elements:

Group name – allows entry and editing of the group name.

Description – allows entry and editing of a detailed group description.

Delete – deletes the group from the company.

To give the group an identity:

- Enter the **Group name** and a **Description** to clearly communicate what the user group is, which function it supports, etc.

To delete the group:

- Click **Delete** to remove the user group.
- When prompted to confirm deletion of the group, click **OK**.
  - ➢ You cannot delete "Default group."

Users tab

The **Users** tab displays all the users within the selected group. You can add users to the group, manage their **Access Rights** for the group or remove them from the group.

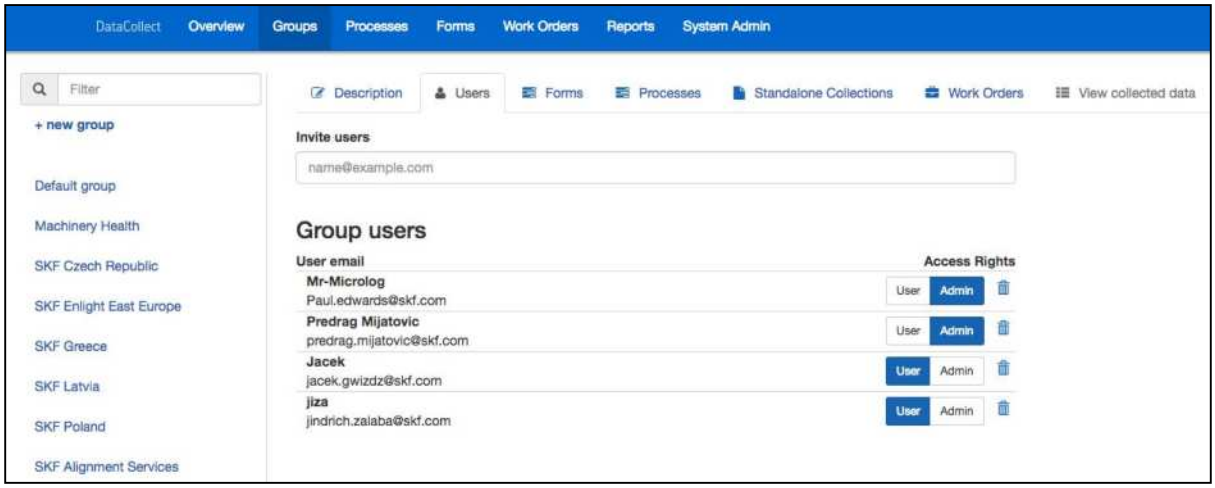


Figure 3 - 11.
The **Groups** View's **Users** Tab.

The **Users** tab contains the following elements:

Invite users – enables addition of new group users.

Group users list – displays all current users within the group.

User e-mail – displays each user's username and email address.

Access rights – displays each user's rights within the group:

User – extends the user rights to access their own forms (collections) within the group only.

Group **Admin** – extends the user rights to access all users' forms (collections) within the group. The user can also change which processes and collections are available for the group or change the group **Description** information. A group can have several administrators, but it is recommended that a group have as few administrators as possible to ensure a consistent operation.

Delete icon – removes the user from the group.

To add a DataCollect user to the group:

- Begin typing the user's DataCollect username or email address in the **Invite users** text box. Their username and email address will appear in a drop-down list.
- Click **Add** next to the appropriate user. DataCollect will add that user to the **Group users** list and sends them a notification email.

To manage a user's Access Rights:

- To the right of each user name and email address, click the appropriate **Access Rights** option, **User** or **Admin**.

To delete a user from a group:

- Click the delete icon to remove the user from the group.
  - ➢ You cannot remove users from the "Default group." You cannot remove a company administrator from any group.

Forms tab

The **Forms** tab displays all the forms associated with the selected group. You can select forms to be associated with the group, activate/deactivate forms for the group or remove forms from the group. You can also view any trend data collected for specific questions on forms for which trending has been enabled.

- ➢ Only forms that have been uploaded to DataCollect are available for association with the group.

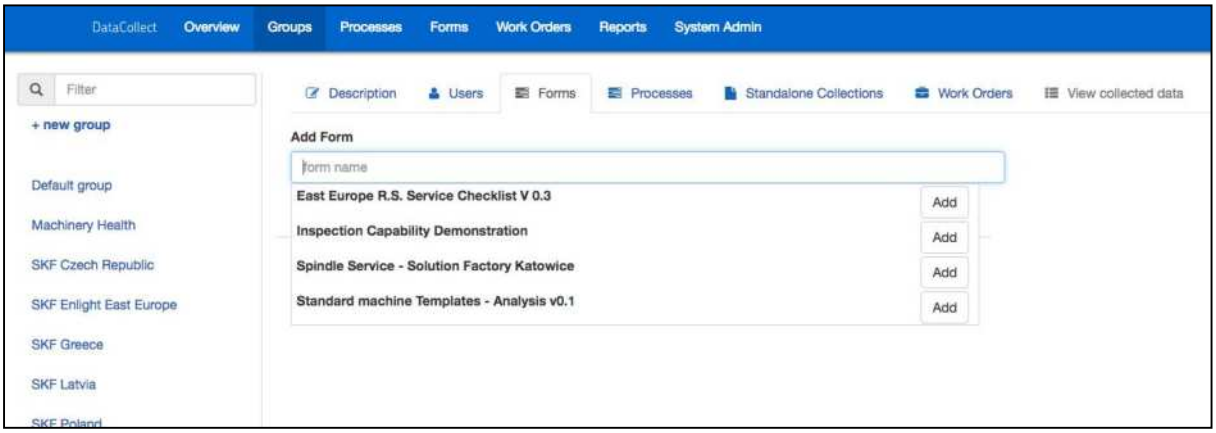


Figure 3 - 12.
The **Groups** View's **Forms** Tab.

The **Forms** tab contains the following elements:

Add Form – enables selection of a form to be used by the group.

Forms list – displays all forms currently associated with the group.

See Trending – accesses the trends screen for the applicable form.

Delete icon – removes the form from the group.

- ➢ If one or more processes has been selected for the group, the corresponding forms will appear in this list and cannot be deleted.

To select forms for this group to use:

- Begin typing the form's name in the **Add Form** text box. Any available forms with names containing the text that you have typed will appear in a drop-down list.
  - ➢ To be available, a form must:
    a. have been uploaded via the Forms view,
    b. have the status "Published", and
    c. NOT already be in use as standalone collection.
- Click **Add** next to the appropriate form. DataCollect will add that form to the group's **Forms** list.

To view trend data for a question on a form for which trending has been enabled:

- Click the **See Trending** button to the right of the applicable form. The trends screen will appear.
- If applicable, select the form version for which you wish to view trend data from the **Select version** drop-down list box.
- Click the category that contains the question that you wish to view. The category will expand to show its sections.
  - ➢ Click **Expand all categories** to immediately view all sections below all categories.
- Click the section containing the question that you wish to view. The section will expand to show its questions.
  - ➢ Click **Expand all sections** to immediately view all questions below all sections.
- Click the hyperlink text or the information icon ( ) of the question containing the trend data that you wish to view. The question will expand to show every measurement that is recorded each time the question is completed via the DataCollect app.

- Click the graph icon ( ) to the right of the measurement containing the trend data that you wish to view. A graph will appear, displaying the trend of recorded data values on the y-axis over time (x-axis).

Figure 3 - 13.
Trend Graph for an ISO Velocity Measurement.

- Select the appropriate value from the **Time intervals** drop-down list box to display data plots for “All”, “Weekly” or “Monthly” time intervals.
- Click the hyperlink text or the close button (x) for the measurement to collapse the displayed graph.
- Click the hyperlink text for any question, section or category to collapse.
  - ➢ Click **Collapse sections** to immediately collapse all sections beneath a category or **Collapse categories** to immediately collapse all categories.
- Click the **Close** button in the top right of the screen to exit the trends screen.

To delete a form:

- Click the delete icon to the right of any form to remove the form from the group.
  - ➢ If one or more processes has been selected for the group, the corresponding forms will appear in this list without delete icons (they cannot be deleted).

Processes tab

The **Processes** tab displays all the processes associated with the selected group. You can select processes to be associated with the group or remove processes from the group.

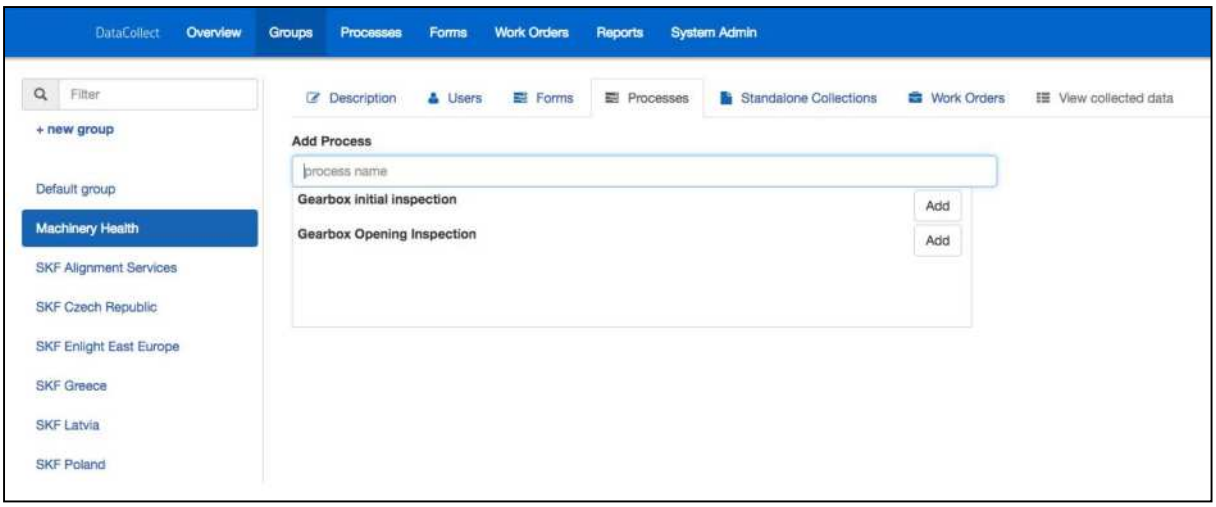


Figure 3 - 14.
The **Groups** View's **Processes** Tab.

The **Processes** tab contains the following elements:

Add Process – enables selection of a process to be used by the group.

Processes list – displays all processes currently associated with the group.

Delete icon – removes the process from the group.

To select the processes this group will use:

- Begin typing the process name in the **Add Process** text box. Any available processes containing the text that you have typed will appear in a drop-down list.
  - ➢ To be available, a process have the status "Published".
- Click **Add** next to the appropriate process. DataCollect will add that process to the group's **Processes** list.

To delete a process:

- Click the delete icon to the right of any process to remove the process from the group.

Standalone Collections tab

The **Standalone Collections** tab displays all collections that are associated with the group, but not with the group's work orders. For each collection, you can review progress and generate reports of collected data on demand to ensure access to the latest synchronised data.

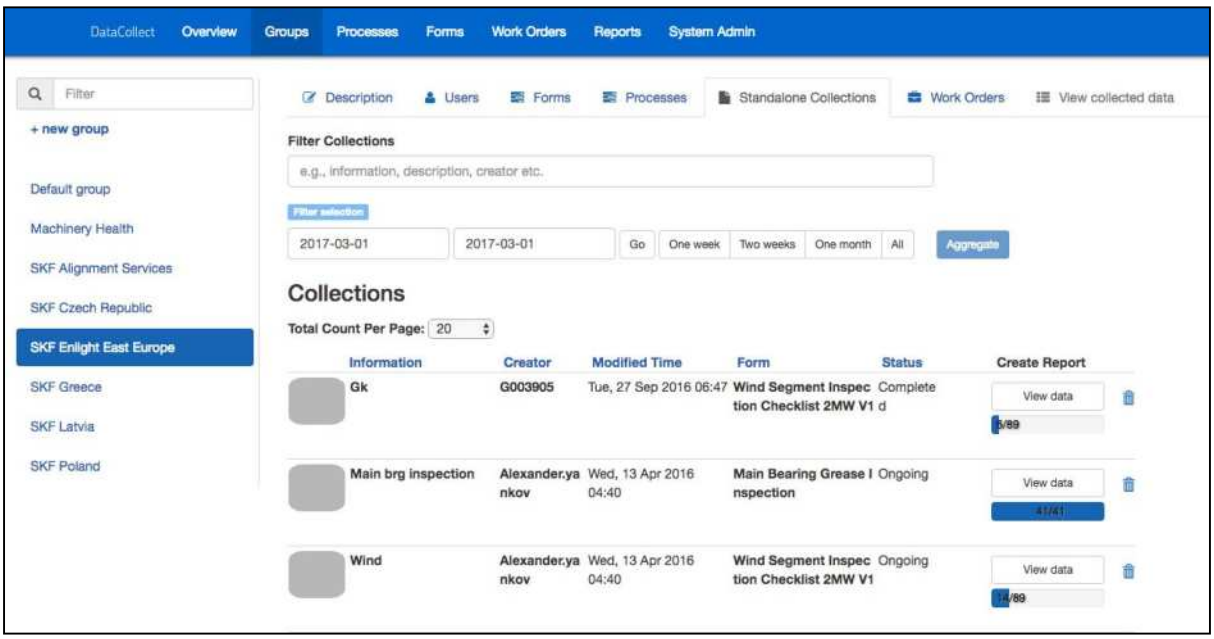


Figure 3 - 15.
The **Groups** View's **Standalone Collections** Tab.

The **Standalone Collections** tab contains the following elements:

Filter Collections – limits the **Collections** list to those with **Information** (collection title), **Creator** or **Form** (collection name) values containing the text entered.

Filter selection: from date/to date – also limits the **Collections** list to those created within the date range entered/selected.

Filter selection: **One week**, **Two weeks**, **One month**, **All** – also limits the **Collections** list to those created within the period selected.

Aggregate (enabled when two or more collections using the same form are selected) – generates an aggregated report for two or more collections' data, provided they use the same form.

Report generation options will appear when you select one or more collection(s), depending on the reporting methods supported by the collection(s). Select **Word**, **Excel**, **PDF** and/or **PowerPoint** to start the process of generating a report based on data from the selected collection(s).

- Click **All** to start the process of generating a report in all available formats, to be saved in a compressed (zipped) folder together with full-resolution images and all notes as separate text files.

Collections list – facilitates review of collection progress and reporting of collected data.

Each collection panel contains:

Information – displays the collection title and image (if added).

Creator – displays the party who created the collection.

Modified Time – displays the date and time of the latest modification to the collection.

Form – displays the collection's name.

Status – displays the collection's status.

- Click any one of the above headers once to sort the list based on that column's values in ascending order. Click the same header again to sort by that column's values in descending order.

Create Report – displays a progress bar indicating the amount of data collected and enables reporting of collected data. The progress bar shows the number of questions completed out of the total number of questions in the collection. Click the **View data** button to preview a report of the collection's collected data.

Completion progress bar – shows the number of questions completed out of the total number of questions in the collection.

Delete icon – removes the collection.

To view a collection's progress:

- Click on the desired collection within the Collections list.
- Refer to the progress bar in the **Create Report** column of the collection panel.

To preview a report of a collection's collected data:

- Within the collection panel, click the **View data** button in the **Create Report** column. A preview of the collection's report will appear on the **View collected data tab**.

To generate a report of a collection's collected data:

- Click on the desired collection panel.
- Click the appropriate report format button: **Word**, **Excel**, **PDF**, **PowerPoint** or **All**.
- Select a template from the **Select report template** drop-down list box and click **Create report**.

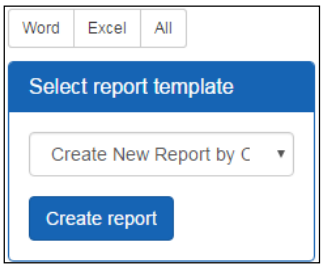


Figure 3 - 16.
Select Report Template Area.

DataCollect generates the report, and the file (or .zip folder) appears in your browser's downloads area.

- Click on the file to open it (or on the drop-down arrow for more options).

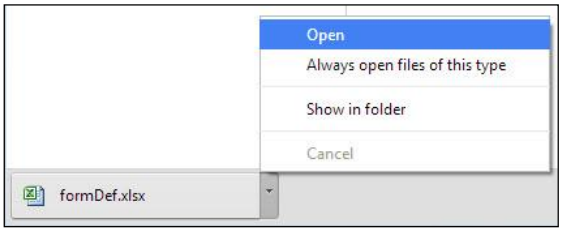


Figure 3 - 17.
Download Options Menu.

To generate an aggregated report of multiple collection's collected data:

You can generate an aggregated report for two or more collections' data, provided they use the same form.

- Click on the desired collection panel. Other collection panels will be disabled (fade in the display). If any collection panels are still enabled (not faded in the display), they represent additional collections using the same form as the collection that you have already selected. Click to select those additional collection panels as appropriate.
- Click the **Aggregate** button.
- Click the appropriate report format button: **Word**, **Excel**, **PDF**, **PowerPoint** or **All**.
- Select a template from the **Select report template** drop-down list box and click **Create report**.
- DataCollect generates the aggregated report, and the Excel file appears in your browser's downloads area.

Work orders tab

The **Work orders** tab displays all the work orders associated with the current group. For each work order, you can review collections' progress and generate reports of collected data on demand to ensure access to the latest synchronised data.

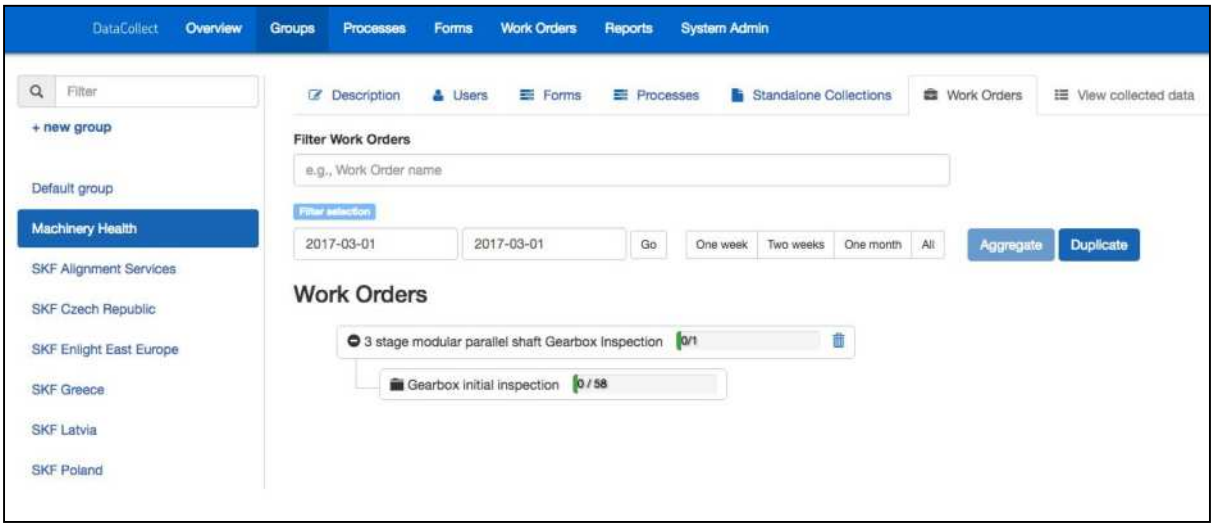


Figure 3 - 18.
The **Groups** View's **Work orders** Tab.

The **Work orders** tab contains the following elements:

Filter Work Orders – limits the **Work orders** list to those with names containing the text entered.

Filter selection: from date/to date – also limits the **Work orders** list to those created within the date range entered/selected.

Filter selection: **One week**, **Two weeks**, **One month**, **All** – also limits the **Work orders** list to those created within the period selected.

Aggregate generates an aggregated report and is enabled when two or more collections using the same form are selected within a single step (provided they use the same form and are used within a single step).

Duplicate starts a wizard that guides through the different steps to copy collection(s).

Report generation options appear when you select one or more work order(s), step(s) or collection(s), depending on the reporting methods supported by the selected item(s). Select **Word**, **Excel**, **PDF** and/or **PowerPoint** to start the process of generating a report based on data from the selected work order(s), step(s) or collection(s).

- Click **All** to start the process of generating a report in all available formats, to be saved in a compressed (zipped) folder together with full-resolution images and all notes as separate text files.

Work orders list – facilitates review of work order progress and reporting of collected data. When a work order is selected, a hierarchical view of its steps, and subsequently its collections, will appear.

Each work order panel contains:

Work order title

Completion progress bar – shows the number of steps completed out of the total number of steps in the work order.

Edit additional information (available if additional information has been previously defined for the work order upon creation) – launches a dialogue enabling edits to the work order's previously-defined additional information.

Delete icon – removes the work order.

Each step panel, viewed by clicking on work order, contains:

Step title

Completion progress bar – shows the number of collections completed out of the total number of collections in the step.

Each collection selection panel, viewed by clicking on a step, contains:

Information – displays the collection title and image (if added).

Creator – displays the party who created the collection.

Modified Time – displays the date and time of the latest modification to the collection.

Form – displays the collection's name.

Status – displays the collection's status.

- Click any one of the above headers once to sort the list based on that column's values in ascending order. Click the same header again to sort by that column's values in descending order.

Create Report – displays a progress bar indicating the amount of data collected and enables reporting of collected data. The progress bar shows the number of questions completed out of the total number of questions in the collection. Click the **View data** button to preview a report of the collection's collected data.

Delete icon – removes the collection from the step (and work order).

To view a collection's progress:

- Click on the desired work order within the **Work orders** list. The work order's steps appear beneath it in the hierarchical view.
- Click on a step. That step's collection selection panels appear beneath it in the hierarchical view.
- Refer to the progress bar in the **Create Report** column of each collection selection panel.

To preview a report of a collection's collected data:

- Within each collection selection panel, click the **View data** button in the **Create Report** column. A preview of the collection's report will appear on the **View collected data tab**.

To generate a report of a collection's collected data:

- Click on the desired collection selection panel.
- Click the appropriate report format button: **Word**, **Excel**, **PDF**, **PowerPoint** or **All**.
- Select a template from the **Select report template** drop-down list box and click **Create report**.

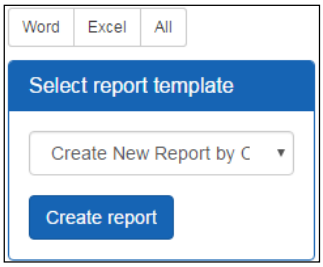


Figure 3 - 19.
Select Report Template Area.

- DataCollect generates the report, and the file (or .zip folder) will appear in your browser's downloads area.
- Click on the file to open it (or on the drop-down arrow for more options).

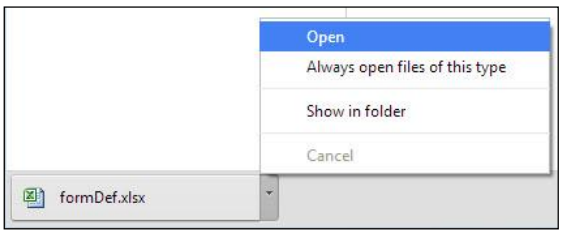


Figure 3 - 20.
Download Options Menu.

To generate an aggregated report of multiple collections' collected data:

You can generate an aggregated report for two or more collections' data, provided they use the same form and are used within a single step.

- Click on the desired collection panel. Other collection panels will be disabled (fade in the display). If any collection panels are still enabled (not faded in the display), they represent additional collections using the same form as the collection that you have already selected. Click to select those additional collection panels as appropriate.
- Click the **Aggregate** button.
- Click the appropriate report format button: **Word**, **Excel**, **PDF**, **PowerPoint** or **All**.
- Select a template from the **Select report template** drop-down list box and click **Create report**.
- DataCollect generates the aggregated report, and the Excel file appears in your browser's downloads area.

To unassign a work order from a group:

- Locate the work order and click **Delete**.
- When prompted to confirm deletion of the work order (in other words, removal from the group), click **OK**.

The work order will no longer be assigned to the group, so it will once again appear on the **Work orders** view's **Create new** tab.

View collected data tab

The DataCollect app automatically synchronises data collected by a user every five minutes or whenever the user chooses to upload data. All data that have been synchronised will be displayed on the **View collected data** tab, whether they be for ongoing or completed collections. A user accesses this tab via a collection's (or form's) **View data** button within a list on either the **Standalone Collections** tab or the **Work Orders** tab. The collected data for that collection (or form) will appear on this tab.

An operator can sign into the web interface to view their own collected data. You can view collected data from every user in the group.

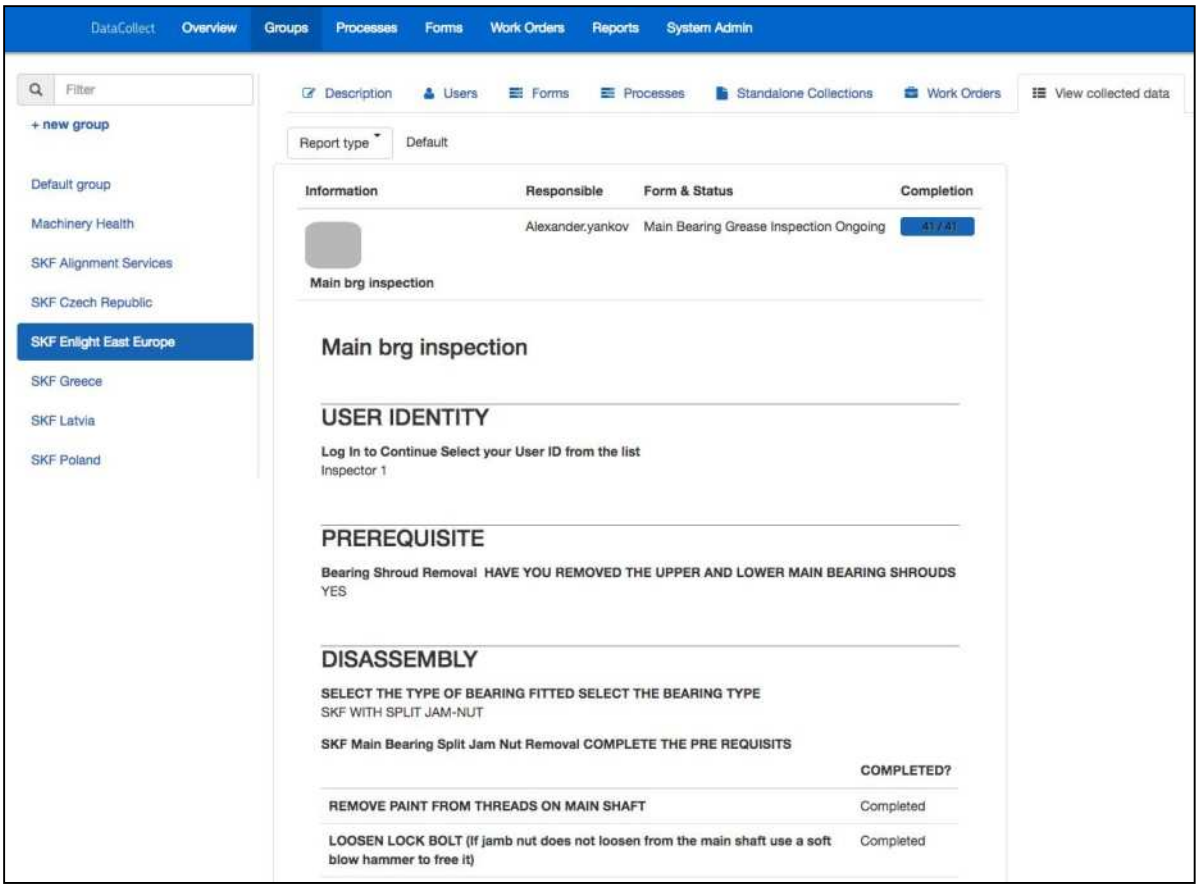


Figure 3 - 21.
The **Groups** View's **View collected data** Tab.

The **View collected data** tab contains the following elements:

Report type – enables switching of preview to one of four formats: Default, Web, Word or Excel.

Form overview – displays the collection's identity and status:

Information – displays the collection title and image (if added).

Responsible – displays the party responsible for completing the form (or indicates that it is a shared form) and when the form was created.

Form & Status – displays the collection form's name and status.

Completion – displays a progress bar indicating the amount of data collected. The progress bar shows the number of questions completed out of the total number of questions in the collection.

To preview reports of any collection's collected data:

- Click the **Report type** drop-down menu button and select the format in which you intend to preview the report.
  - ➢ When you first access the **View collected data** tab, the report will initially display in the default view.

Define Processes in the Processes View

In the **Processes** view, you can create and manage processes, including the definition of steps in the process and assignment of forms to those steps.

Click the **Processes** button at the top of the web interface to display the **Processes** view.

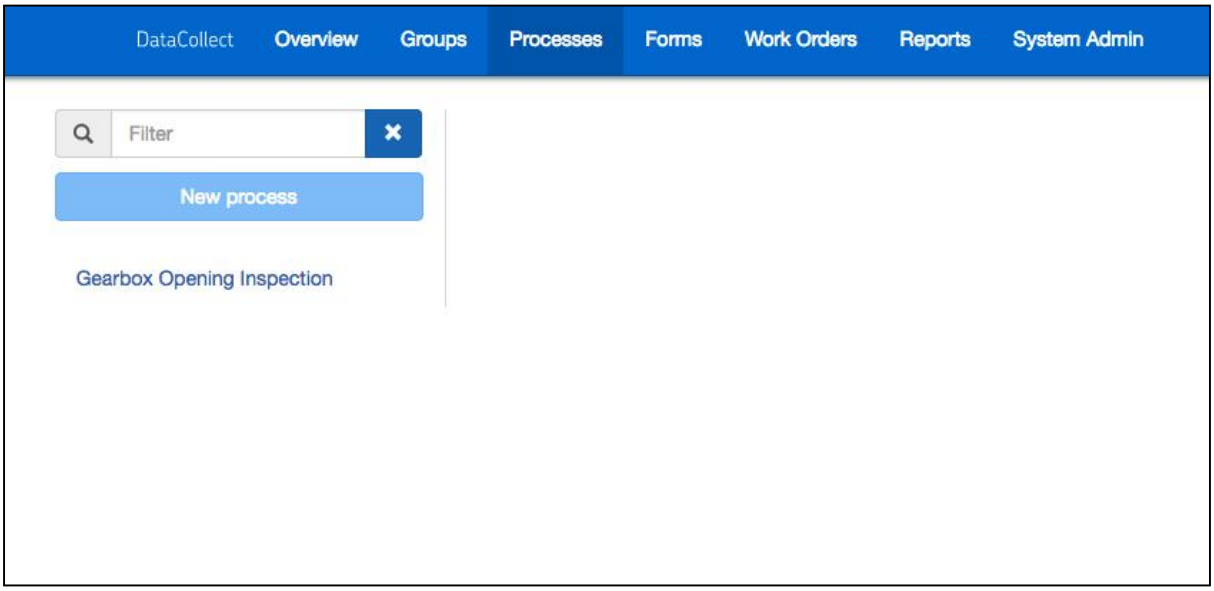


Figure 3 - 22.
The **Processes** View.

The **Processes** view contains the following elements:

Filter – limits the Processes list to those with process names containing the text entered.

New process – creates a new process.

Processes list – lists all processes within the company.

Publish button/**Published** indicator – shows whether the selected process has been published or is a work in progress.

- If the button reads "**Publish**," click the **Publish** button to publish the process for use among the groups or **Delete** to remove the process. If the button reads "**Published**" and displays a checkmark, you can click **Edit** to make the process editable or **Delete** to remove the process.

When you click on a process, it will load with the following tabs (described in greater detail later in this section) available in the view's primary work area:

Description – facilitates identification of the process.

Additional Information – facilitates addition of any extra information that you intend to associate with this process.

Steps – facilitates construction of the process by adding steps and selecting forms to associate with each step.

Create a Process

To create a new process or create a copy of an existing process:

- Click the **New process** button. A **New Process** screen will appear.

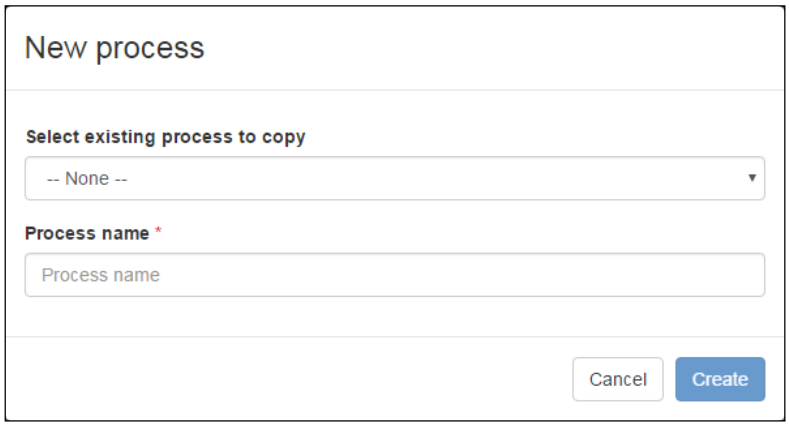


Figure 3 - 23.
The **New Process** Screen.

- To create a copy of an existing process, select a process from the **Select existing process to copy** drop-down list. To create an entirely new process, leave this field empty.
- Enter a **Process Name** for the new process.
- Click **Create**. The new process will appear in the processes list.
- Click on the process within the processes list. The process will load automatically in the screen's primary work area with the **Description** tab displayed.
    - ➢ The following pages describe the steps necessary for your newly added process, already loaded in the primary work area. You can select this or any other process from the processes list at any time to make updates to its properties on these same tabs.

Manage a Process

Description tab

The **Description** tab displays the identity of the selected process. You can enter or edit the **Process Name** and **Description**.

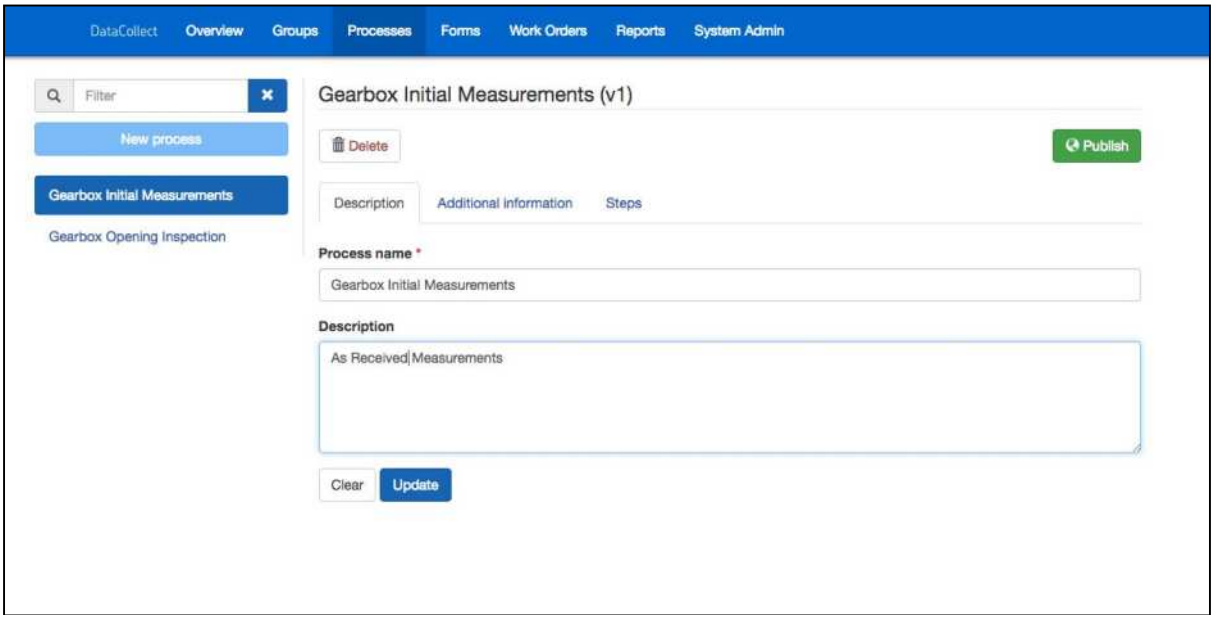


Figure 3 - 24.
The **Processes** View **Description** Tab.

The **Description** tab contains the following elements:

Process name – allows editing of the process name.

Description – allows editing of the process description.

- ➢ You can only edit the process name and description when the process has the status "Under construction".

To update the process identity:

- Edit the **Process name** and a **Description** to clearly communicate what the process is, which function it supports, etc.

To delete a process under construction:

- If the process is loaded in the **Processes** view, click **Delete**.

Additional Information tab

The **Additional Information** tab enables you to set up extra information entries to be completed upon creation of a work order for this process.

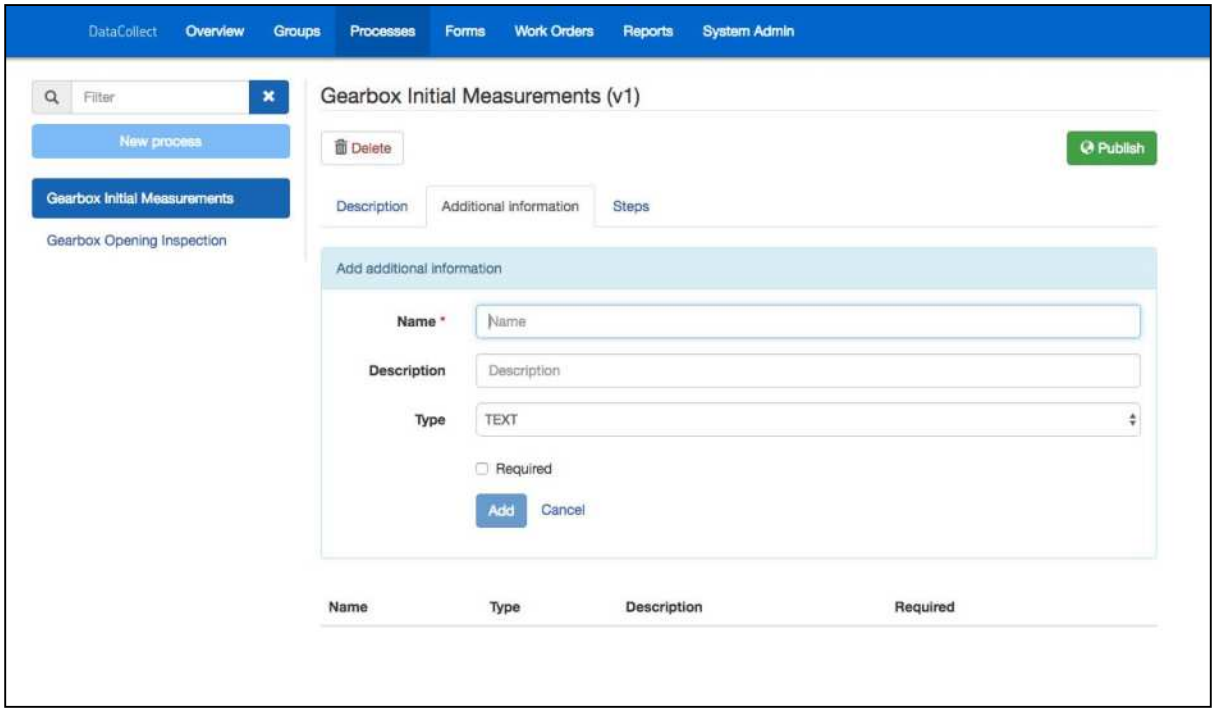


Figure 3 - 25.
The **Processes** View **Additional Information** Tab.

The **Additional Information** tab contains the following elements:

+ Add additional information – creates a new additional information record.

- You can only add additional information when the process is in an editable state (not published).

When you click **+ Add additional info**, the following elements will appear:

Name – enter the additional information topic for which you intend to request an entry during work order creation.

Description – enter a description of the additional information for which you intend to request an entry during work order creation.

Type drop-down list – select the entry syntax (TEXT or INTEGER) for the entry to be requested during work order creation.

Required checkbox – select to indicate that the entry to be requested will be required.

Add – click to add the additional information record to the additional information list.

Cancel – click to cancel the addition of a new additional information record.

Additional information list – lists all additional information entries to be completed upon creation of a work order for the process

Name – the additional information topic for which an entry will be requested during work order creation.

Type – the entry syntax for the entry to be requested during work order creation.

Description – a description of the additional information for which an entry will be requested during work order creation.

Required – indicates whether the entry to be requested will be required.

Delete icon – removes the additional information record from the list.

Steps tab

The **Steps** tab displays all the steps within the process and all the forms associated with each step. Here you will construct the process by adding steps and selecting forms to associate with each step.

- You can only add steps to a process if the process has not yet been published.

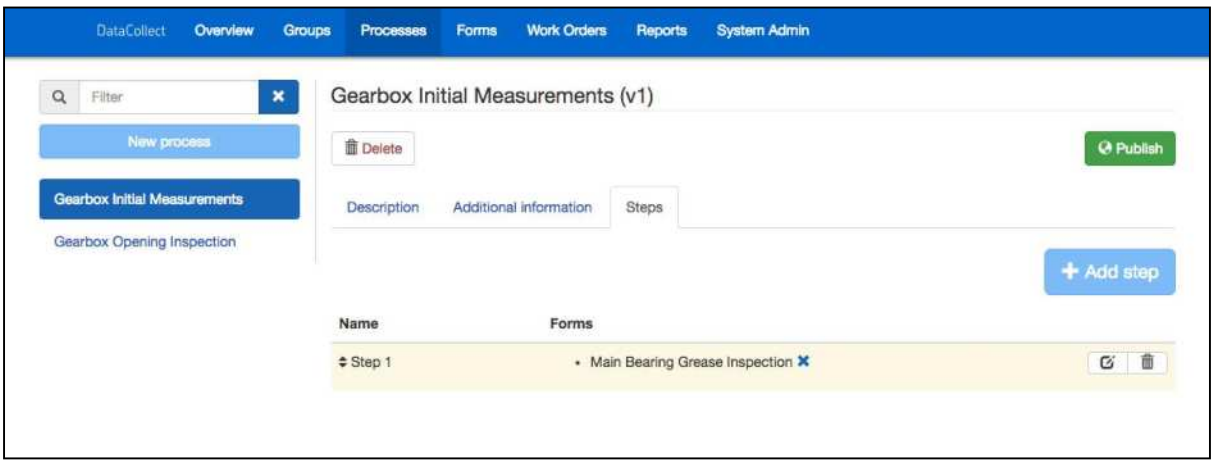


Figure 3 - 26.
The **Processes** View **Steps** Tab.

The **Steps** tab contains the following elements:

+ Add step – creates a new step.

When you click **+ Add step**, the following elements will appear:

Name – facilitates entry of a name for the step.

Add – adds the newly named step to the step list.

Cancel – cancels the addition of a step.

Step list – lists all steps within the process.

- Move step icon – facilitates drag and drop reordering of the corresponding step.

  Name – displays the step name defined upon adding the step.

  Forms – displays all forms associated with each step. If the process is still editable (not published), there will be a remove icon (✖) next to each form.

- Add forms icon – facilitates selection and addition of existing forms to the corresponding step.

- Delete icon – facilitates removal of the corresponding step.

➢ You can only use the add forms or delete option when the process is in the editable (not published) state. These options are not available for published processes.

To add a step:

- Click the **+ Add step** button. The **Add step** area will appear.
- Enter a **Name** for the new step and click **Add**. The new step will appear in the step list.

To associate one or more forms with a step:

- Within the appropriate row, click the add forms icon. An **Add forms to step** screen will appear.
- Click on one or more forms to add to the step and click **OK**. The newly associated forms will appear within the step's row in the step list.

  ➢ Forms to be added to the step will be highlighted. To deselect a previously selected form, click the form again so that it is not highlighted.

To remove a form from a step:

- Within the appropriate row, click the remove icon next to the form that you intend to remove. The form will disappear from that step's row in the step list.

To move a step:

- Click and hold on the move step icon next to the step that you intend to move.
- Drag the step up or down in the step list and release to drop it into place.

To remove a step:

- Click the delete icon within the step that you intend to remove. The step will disappear from the step list.

Publish a Process

Once you have added all the steps that belong in the process and have associated all the forms as appropriate to each step, you are ready to publish the process. By publishing the process, you are making it available to be assigned to groups via the **Groups > Processes** tab.

To publish a process:

- Click the **Publish** button at the top of the **Processes** view. The process will move to **Published** status.

To edit a published process:

- If the process is loaded in the **Processes** view, click the **Edit** button.
- Make changes to steps and/or forms as necessary and click the **Publish** button to re-publish the process.

To delete a published process:

- If the process is loaded in the **Processes** view, click the **Delete** button.

Create Forms in the Forms View

In the **Forms** view, forms can be created in Form Builder or uploaded from completed Excel-based templates, which now officially become "forms" within the web interface. Here existing forms can also be updated and managed, and form assets can be added.

> ➢ If **Allow group admin to create form** is set to "On" in the Overview view, group administrators can create or upload new forms; if it is set to "Off", only company administrators can create or upload new forms.

IMPORTANT: DataCollect will not allow you to upload a new form with the same FormName value (within the Excel template) as that of any forms already in the system.

Click the **Forms** button at the top of the web interface to display the **Forms** view.

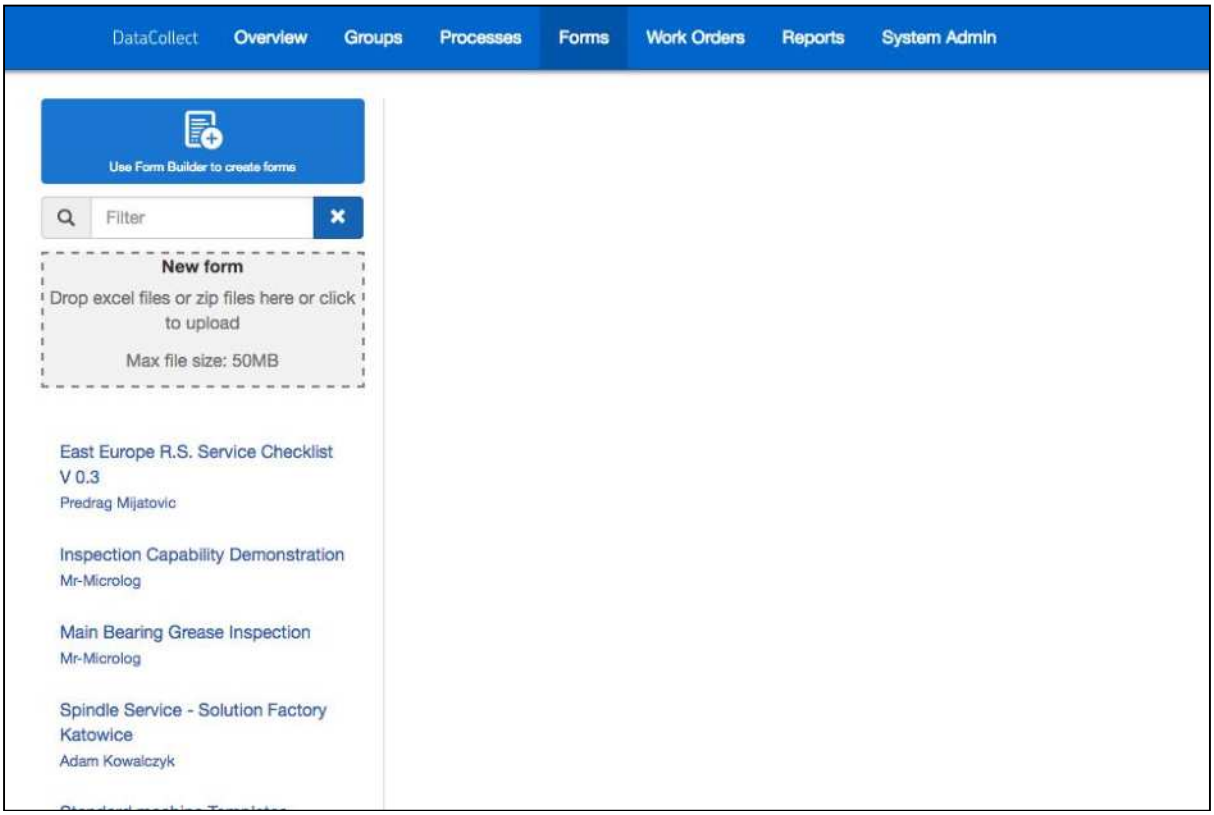


Figure 3 - 27.
The **Forms** View.

The **Forms** view contains the following elements:

Form Builder – forms can be created and uploaded.

Filter – limits the Forms list to those with form names containing the text entered.

New form – facilitates the upload of an Excel-based form template.

Forms list – lists all forms within the company created from either Form Builder or from an Excel-based template.

Create or upload a Form

- If **Allow group admin to create form** is set to "On" in the Overview view, group administrators can create new forms in Form Builder or upload forms from an Excel-based template; if it is set to "Off", only company administrators can create (upload) new forms.

To create and upload a form in Form Builder:

- Click **Use Form Builder to create form**.
- Forms can be created, titled, saved and uploaded to the web interface.

The web interface will automatically notify you if the form contains errors or misconfigurations, and indicate where you can find them. The web interface will not upload any form containing errors. If errors occur when trying to save the form, the following message will be displayed:

Figure 3 - 28.
Unable to save.

To upload a form from an Excel-based template:

- Drag and drop the appropriate Excel-based template from your desktop or a Windows explorer window into the **New form** "drop zone"/button.
  - ➢ The "drop zone" will turn blue as you drag the template into the browser window to indicate the area in which you must "drop" the file.

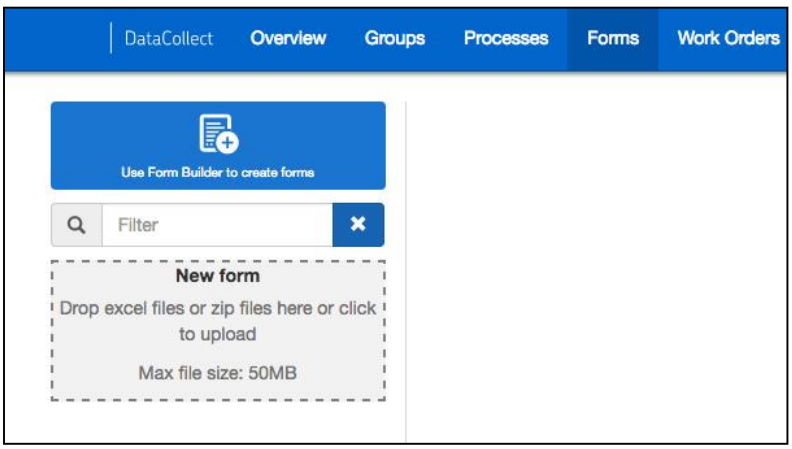


Figure 3 - 29.
Template Upload (Option 1).

OR

- Click the **New form** button to browse for and select the appropriate Excel-based template.

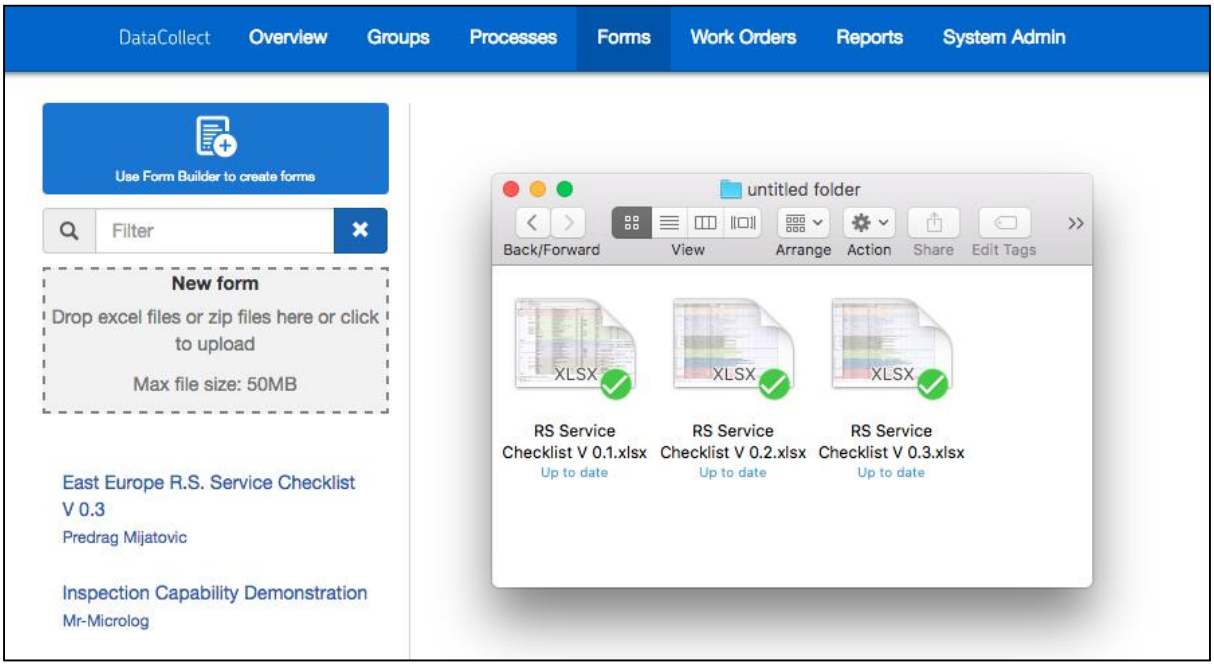


Figure 3 - 30.
Template Upload (Option 2).

The web interface will automatically notify you if the form template contains errors or misconfigurations, and indicate where you can find them. **The web interface will not upload any form template containing errors.**

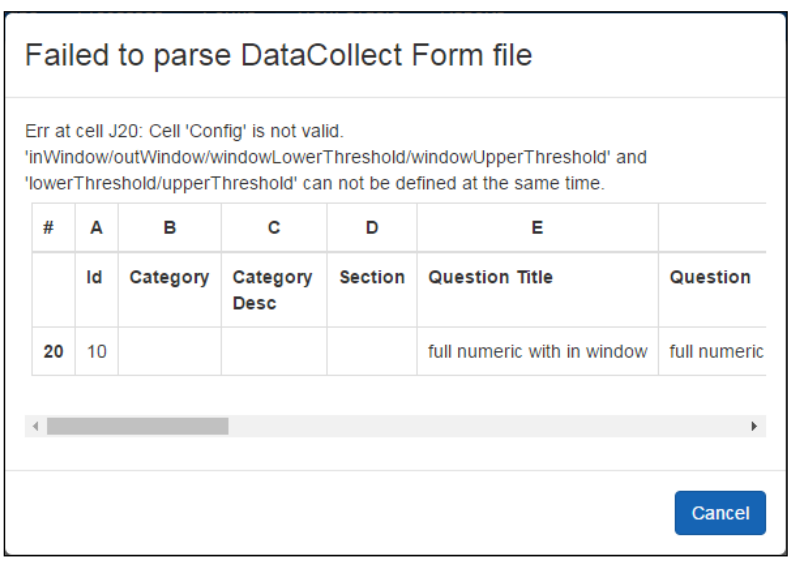


Figure 3 - 31.
Failed Upload Example.

The web interface will display a success message once the form template has uploaded.

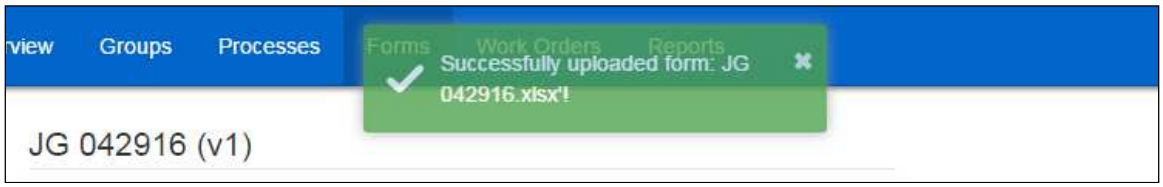


Figure 3 - 32.
Successful Upload Example.

Once a form has been successfully uploaded (from Form Builder or from an Excel-based template), it officially becomes a form within the web interface that, once published, can be assigned to users. The newly created form will appear in the forms list on the left side of the page.

- Before the form is published, review and make additions and edits to the form's information as appropriate via the **Forms** view tabs.
- Once a form is published, you can still upload an updated version of the form by clicking the **Form Builder** or **Update form** button at the top of the **Forms** view.

Manage a Form

When you click on a form, it will load with the following form management tabs (described in greater detail later in this section) available in the view's primary work area:

Information – displays the form name and status, as well as user groups using the form. Facilitates form downloads and updated form template uploads.

Languages – facilitates addition of translated form templates.

Assets – facilitates the upload of image files (assets) associated with the form.

Administrators – facilitates management of users to have administrator access rights.

Export settings – for any form with submit functionality enabled, facilitates entry of a web address to which DataCollect will send results for collections based on this form. *Please contact IT Service for more information on this feature.*

While in the **Forms** view, you can also download the current form, delete the form, upload an updated form template (from Form Builder or from an Excel-based template) or compare form versions. Several buttons will also appear at the top of the screen when a form loads:

Form Builder – initiates updates of forms in Form Builder. To update a form in the web interface, select a form from the forms list on the left side of the screen. Click the Form Builder button and the form will appear in Form Builder. From here, the form can be edited. When saving changes, DataCollect will assign a new, non-editable version number to the form. The updated form will populate throughout all processes in which it is used, with the exception of those that are part of existing open or closed work orders.

Download – initiates a download of the form as a Microsoft Excel spreadsheet.

As zip file – initiates download of the selected form as a compressed archive of a Microsoft Excel spreadsheet.

Duplicate – creates a copy of the form currently loaded, to be renamed as a new version of the same form. The copy will not be associated with any user groups.

Update form – initiates upload of an updated Excel-based form template. When the upload step is complete, DataCollect will assign a new, non-editable version number to the form. The updated form will populate throughout all processes in which it is used, with the exception of those that are part of existing open or closed work orders.

- ➢ DataCollect will not allow update of an existing form with a form template that has a different FormName value (within the Excel spreadsheet) if that FormName value is already in the system (used for another form).

Delete – removes the selected form.

Compare versions – enables side-by-side comparison of different versions of the selected form. Categories, sections and/or questions may have been changed from one version of a form to the next, and this comparison feature helps you identify any changes.

Publish button/**Published** indicator – shows whether the selected form has been published or is a work in progress.

- Click the **Publish** button to publish the form.
- ➢ Alternatively, once you have added all appropriate assets to the form, the system will automatically publish the form.

Information tab

The **Information** tab displays **User groups using this form** – all user groups, processes and process steps using the selected form. Click on a group to load it in the **Groups** view or a process to load it in the **Processes** view.

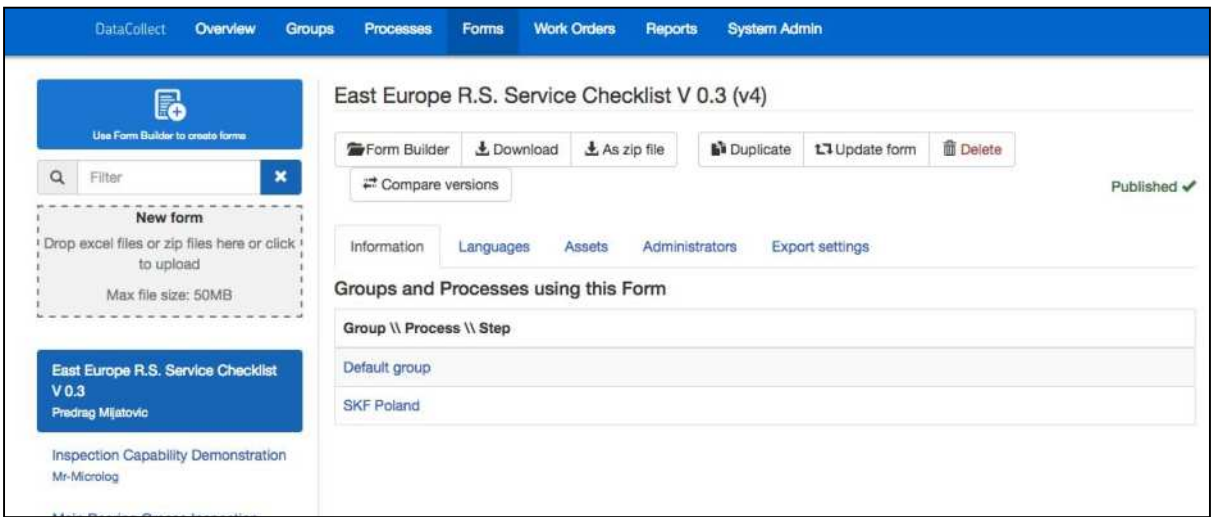


Figure 3 - 33.
Forms View **Information** Tab.

Languages tab

The **Languages** tab facilitates the addition of translated form templates files. A user can work in the DataCollect app in any one of several supported languages. If a form includes translated templates on this tab for specific languages, and the user will be working in the app in one of those languages, the corresponding collection questions that they see will be in the appropriate language.

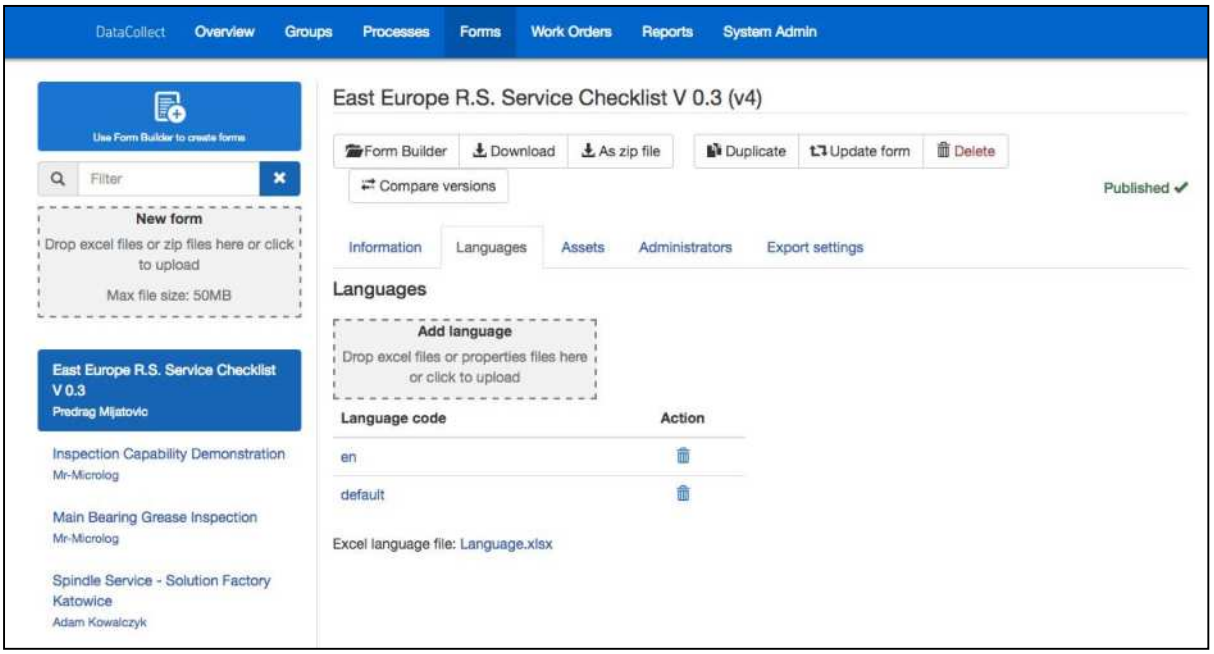


Figure 3 - 34.
Forms View **Languages** Tab.

To create and upload a translated form template:

- Click the **Language.xlsx** hyperlink to download the current form's **Excel language file**.
- Open the downloaded file.
- Replace "en" in cell B1 with the appropriate identifier for the language into which you intend to translate the form (contact Apps Support for additional details on language identifiers).

- Continue translating the form by replacing the contents in column “B” with the appropriate translated text.

	A	B	C	D
1	Key	en	default	
2	frontPage	Categorie	Categories	
3	categories	Categorie	Categories	
4	questions	Questions	Questions	
5	formTitle	JG-012116	JG-012116a_all ques	
6	categories	Categorie	Categories	
7	categories	Categorie	Categories	
8	questions	Questions	Questions	
9	ct10	All Questi	All Question types-I	

Figure 3 - 35.
Excel Language File.

- Save the file to your desktop or other appropriate location.

- Drag and drop the file from your desktop or a Windows explorer window into the **Add language** “drop zone”/button.

  ➢ The “drop zone” will turn blue as you drag the file into the browser window to indicate the area in which you must “drop” the file.

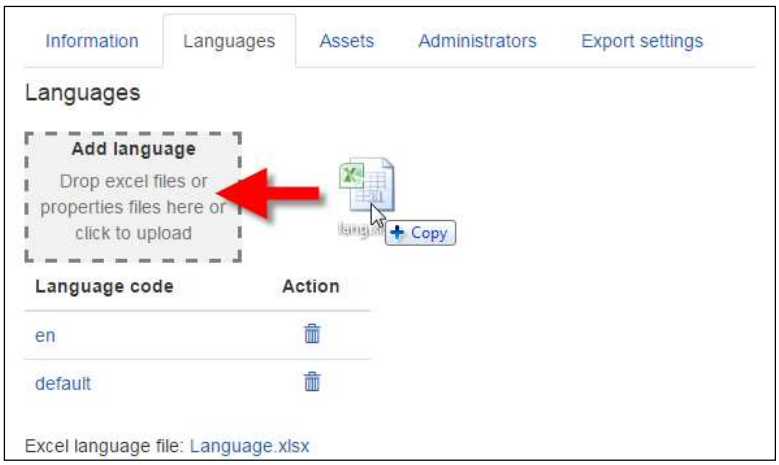


Figure 3 - 36.
Language File Upload (Option 1).

OR

- Click the **Add language** button to browse for and select the appropriate file.

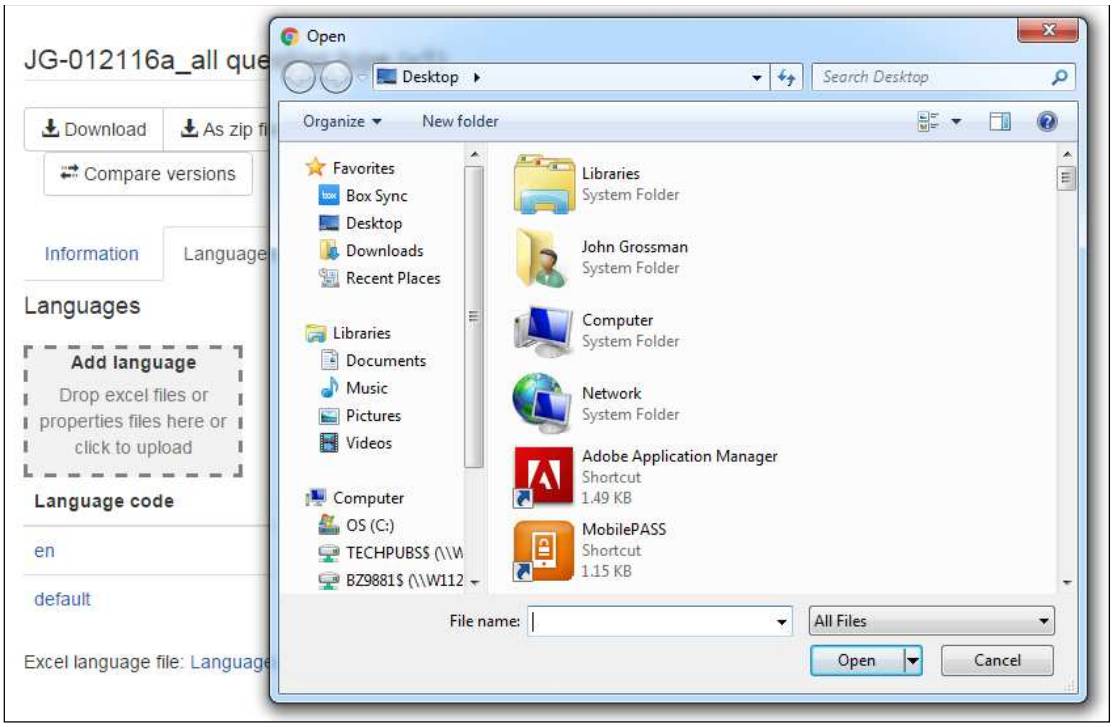


Figure 3 - 37.
Language File Upload (Option 2).

The web interface will display a success message once the file has uploaded.

To delete a translated form template:

- Click the delete (🗑) icon in the **Action** column for the translated form template that you wish to delete. A confirmation prompt will ask you whether you are sure that you want to delete the selected language.

- Click **OK**. The system will delete the translated form template.

Assets tab

The **Assets** tab contains all the images (assets) associated with the selected form. You can include .jpg image files in your form, for example in conjunction with help or other text. If the uploaded form template includes coding to indicate the placement of one or more image files (e.g. **) , the web interface will set the form to display those asset images(s) where appropriate, provided you have also uploaded their files.

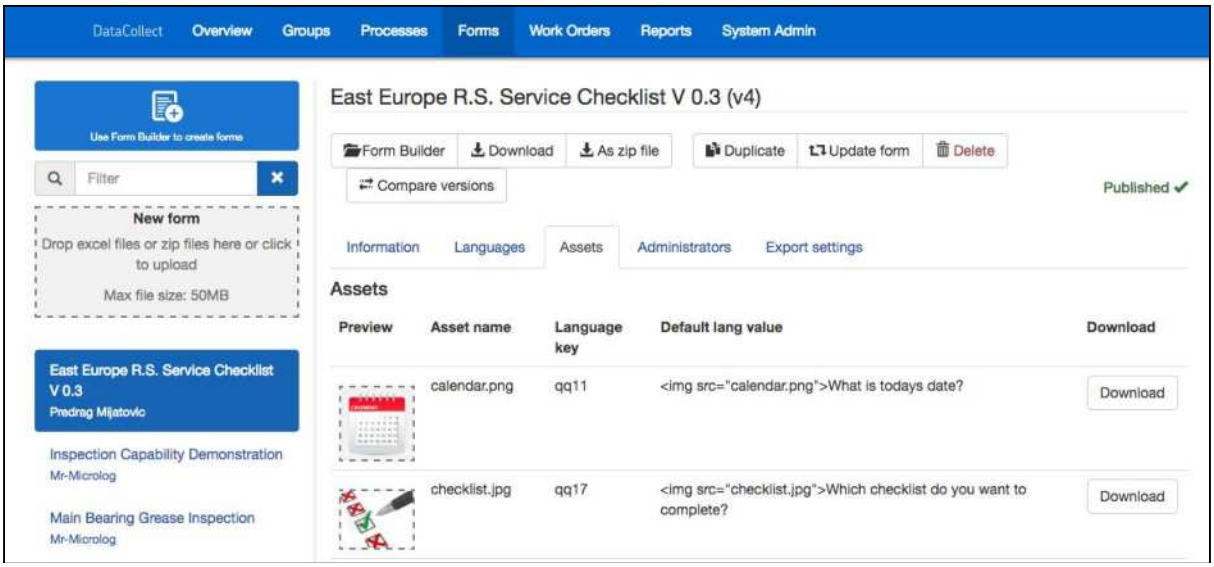


Figure 3 - 38.
Forms View **Assets** Tab.

The **Assets** tab contains the following elements:

Assets list – displays all the assets associated with the form.

Preview – displays a thumbnail of the asset. When this space displays a "no image" logo, an image file upload is required.

Asset name – displays the asset filename.

Language key – Identifies the image asset defined in a form definition.

Default lang value – the default value for this asset.

Download – downloads the corresponding image file, if one has been previously uploaded.

To upload a .jpg file:

- Drag and drop the appropriate .jpg file from your desktop or a Windows explorer window into the asset's corresponding "drop zone"/button.

- All “drop zones” will turn blue as you drag the .jpg file into the browser window. Be sure your cursor is within the bounds of the desired asset’s “drop zone” when you “drop” the .jpg file.

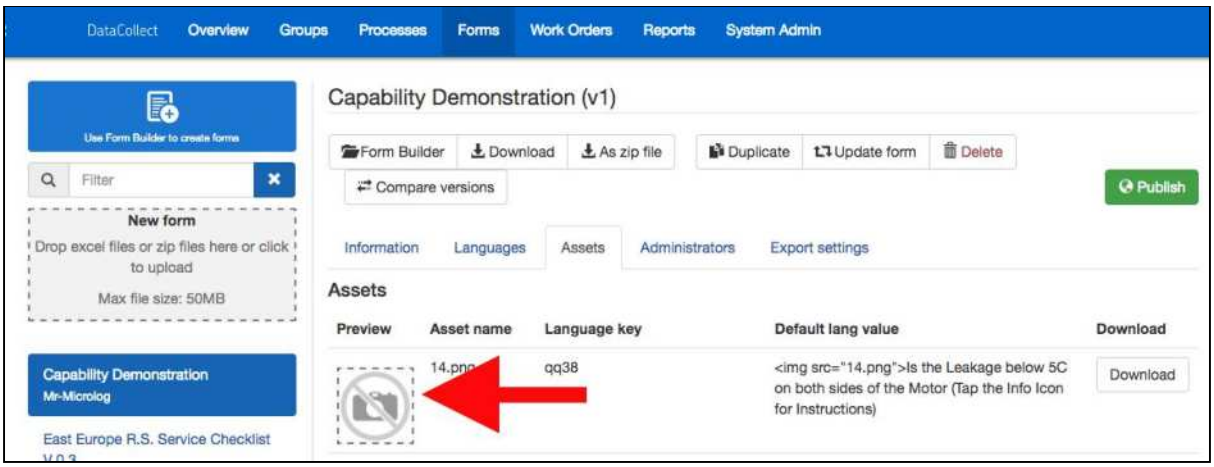


Figure 3 - 39.
Asset Image Upload (Option 1).

OR

- Click the **Download** button within an asset row to browse for and select the appropriate .jpg file.

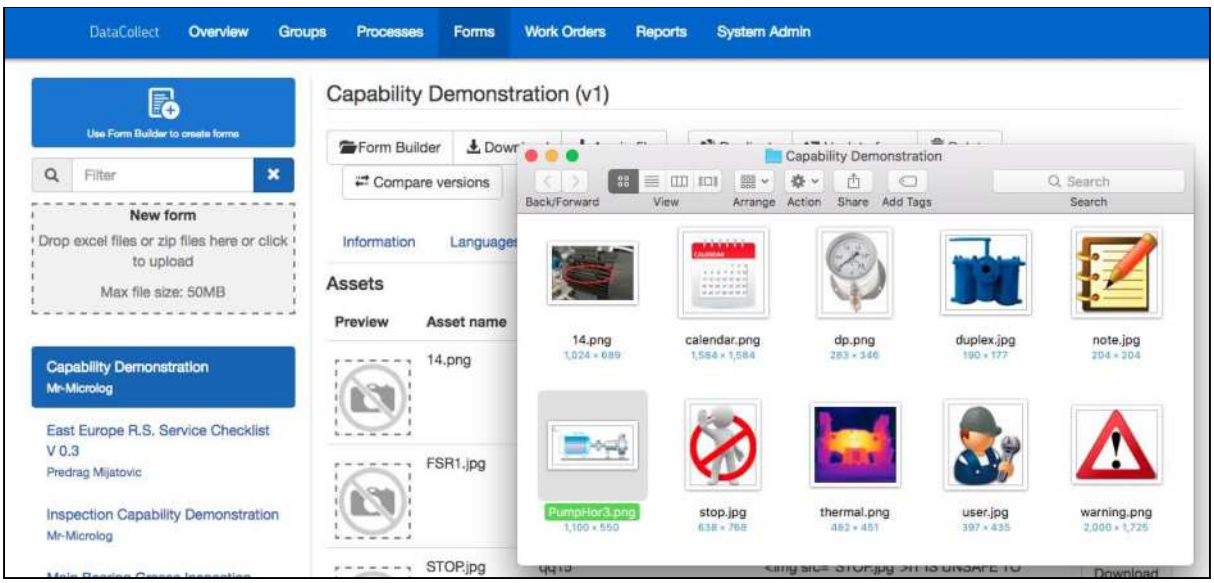


Figure 3 - 40.
Asset Image Upload (Option 2).

The web interface will display a success message once the .jpg file has uploaded.

- ➢ If an updated form in Form Builder or an Excel-based template is subsequently uploaded for the same form, as long as the asset

filenames contained in the updated template have remained the same, the web interface will retain the assets stored with the original form.

- If any asset filename has been removed from the updated form in Form Builder or in the Excel-based template, the web interface will delete the corresponding asset stored with the original form.
- If any new asset filename exists in the updated form in Form Builder or in the Excel-based template, an image file upload will be required after the template upload.

Administrators tab

The **Administrators** tab lists all users who have been assigned as an administrator of the selected form. All company administrators are automatically form administrators. If **Allow group admin to create form** is set to "On", group administrators are also form administrators.

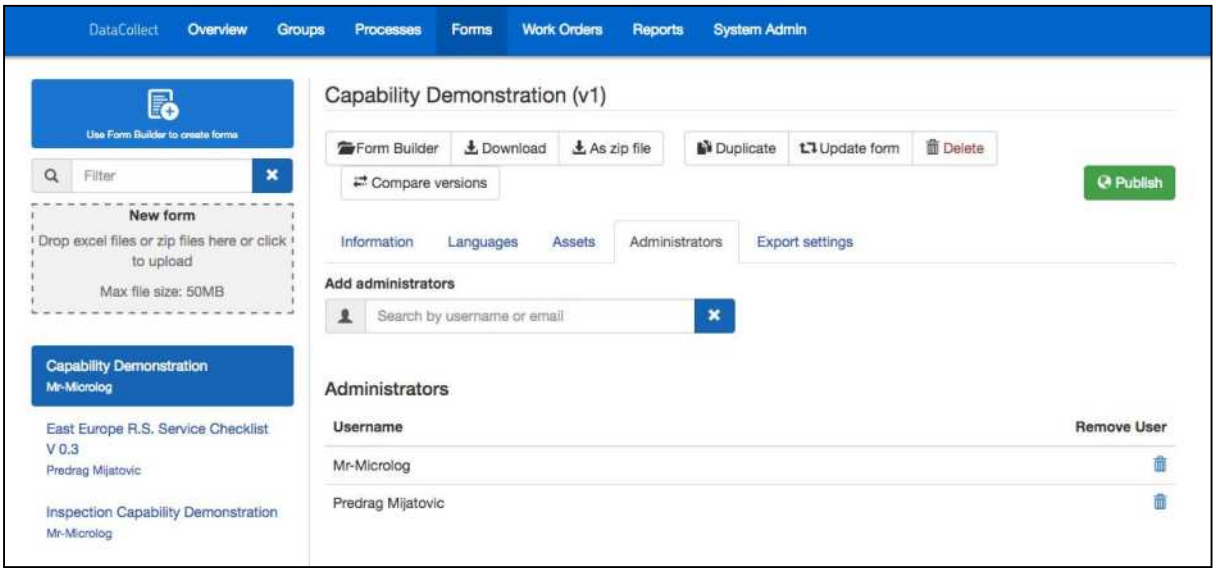


Figure 3 - 41.
Forms View **Administrators** Tab.

The **Administrators** tab contains the following elements:

Add administrators – enables addition of form administrators.

Administrators list – displays all administrators assigned to the form.

Username – the administrator's DataCollect username.

Remove User – removes the corresponding user from the form administrators list.

To add a form administrator:

- Begin typing the user's DataCollect username or email address in the **Add administrators** text box. Their username and email address will appear in a drop-down list.

- Click **Add** next to the appropriate user. DataCollect will add that user as a form administrator.

Export settings tab

If the current form is configured (via Form Builder or in an Excel-based form template) to include submit/export functionality, the **Export to url** field will enable you to specify the web address to which DataCollect will send results for collections based on this form. Contact Apps Support with any questions regarding this feature.

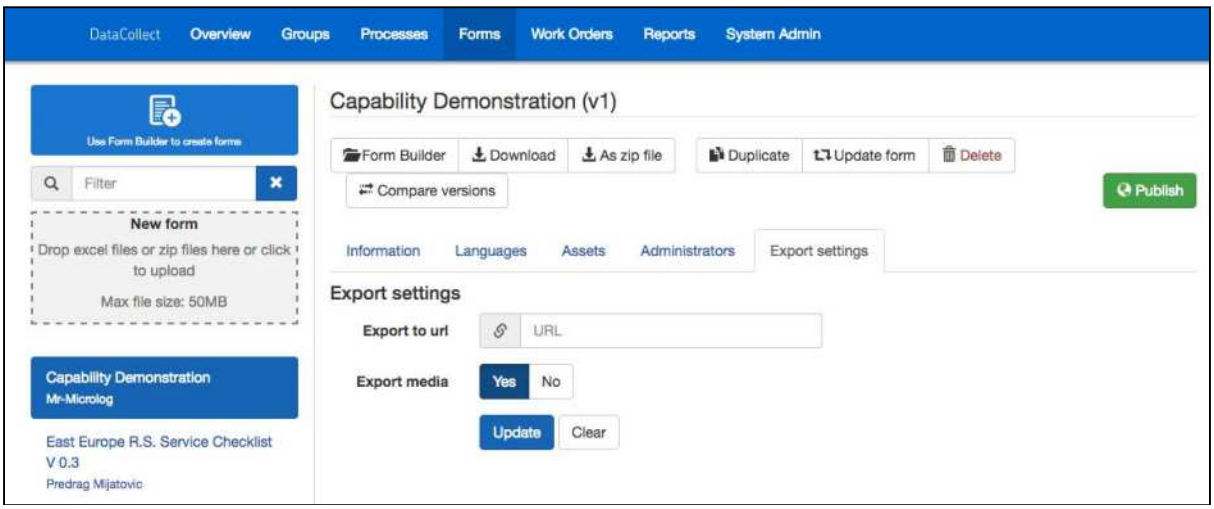


Figure 3 - 42.
Forms View **Export settings** Tab.

To specify the web address to which DataCollect will send collection results:

- Enter a valid URL in the **Export to url** text box.
- Leave the default "**Yes**" selected next to **Export media** to have DataCollect send (during the export) all images and other media associated with the form and collection. Select "**No**" to have DataCollect exclude all media from the export.
- Click **Update**.
  - ➢ Click **Clear** to restore the defaults.

Other form management buttons

To download a copy of the selected form:

IMPORTANT: The web-based system is optimised to run in a Google Chrome browser. All instructions provided are for a Google Chrome browser; experiences in other browsers may vary.

- Click the **Download** button or the **As zip file** button at the top of the **Forms** view. The file will appear in your browser's downloads area.

- Click on the file to open it (or on the drop-down arrow for more options).

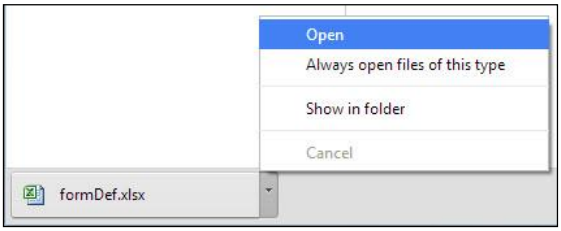


Figure 3 - 43.
Download Options Menu.

To create a copy of the selected form:

- Click the **Duplicate** button at the top of the **Forms** view. A **Duplicate form definition** window will appear.

- Enter a **Form Name** for the new form and click **OK**.

To update a selected form:

- To update a form in Form Builder, click **Form Builder** at the top of the **Forms** view. The **Form Builder** view will then be shown where you can edit and update the form.

- To update an Excel-based form template, click the **Update form** button at the top of the **Forms** view. An **Upload new file** window will appear.

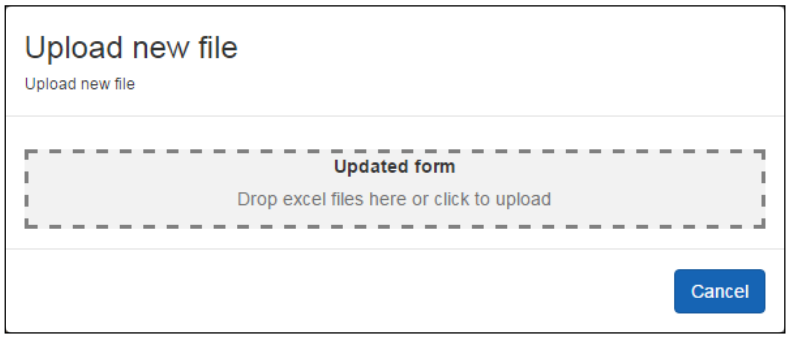


Figure 3 - 44.
An Update Form Window.

- Drag and drop the appropriate Excel-based template from your desktop or a Windows explorer window into the **Update form** "drop zone"/button.

  - ➢ The "drop zone" will turn blue as you drag the template into the browser window to indicate the area in which you must "drop" the file.

OR

- Click the **Updated form** button to browse for and select the appropriate Excel-based template.

Once the form template has successfully uploaded from Form Builder or an Excel file template, the form in the web interface will be updated.

- DataCollect will assign a new, non-editable version number to the form.
- The updated form will populate throughout all processes in which it is used, with the exception of those that are part of existing open or closed work orders.

- As long as the asset filenames contained in the updated form in Form Builder or in the Excel based template have remained the same, the web interface will retain the assets stored with the original form.
- If any asset filename has been removed from the updated form in Form Builder or in the Excel-based template, the web interface will delete the corresponding asset stored with the original form.
- If any new asset filename exists in the updated form in Form Builder or in the Excel-based template, an image file upload will be required after the template upload.

To permanently delete the selected form:

- Click the **Delete** button at the top of the **Forms** view. A Delete Form window will appear.
- Click **OK** to confirm that you want to delete the form. The web interface will permanently delete the form.

To compare versions of the selected form:

- Click **Compare versions**. The version comparison screen will appear. By default, the latest version of the form will appear in the **Select version** drop-down list box. Select a different version from the drop-down list box if desired.
- Select the form version that you wish to compare with the **Select version** from the **Compare to** drop-down list box.
- Click **Compare**. Expandable outlines of both versions will display on the screen.
- For each version, click the categories containing the sections and/or questions that you wish to compare. These categories will expand to show their sections.
    - Click **Expand all categories** to immediately view all sections below all categories.
- Click the sections containing the questions that you wish to view. These sections will expand to show their questions.
    - Click **Expand all sections** to immediately view all questions below all sections.

- Click the hyperlink text or information icon ( ) to the right of the question containing the changes that you wish to review. The question will expand to show its properties.

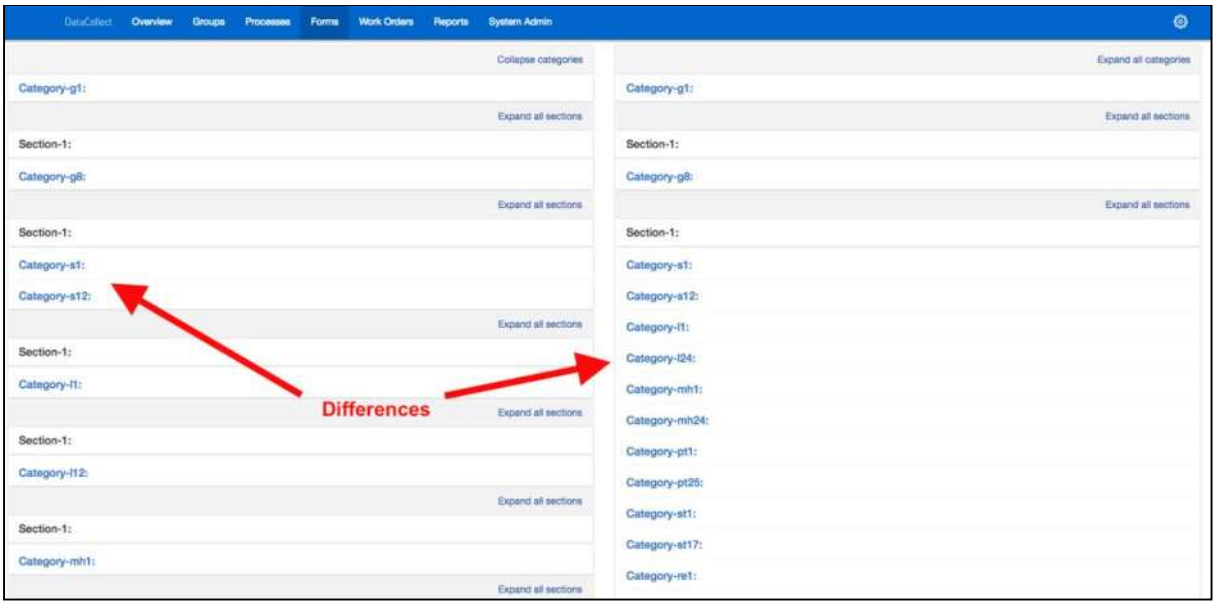


Figure 3 - 45.
Form Version Comparison Screen.

- Click the hyperlink text or close button (x) to the right of the question to collapse the displayed properties.
- Click the hyperlink text for any section or category to collapse.
- Click the **Download** button associated with either version to download a copy of that version of the form.
- Click the **Close** button in the top right of the screen to exit the version comparison screen.

Create Work Orders in the Work Orders View

In the **Work orders** view, you can create the work orders from which users will initiate data collection within the app and from which they will ultimately generate reports within the web interface.

Click the **Work Orders** button at the top of the web interface to display the **Work Orders** view.

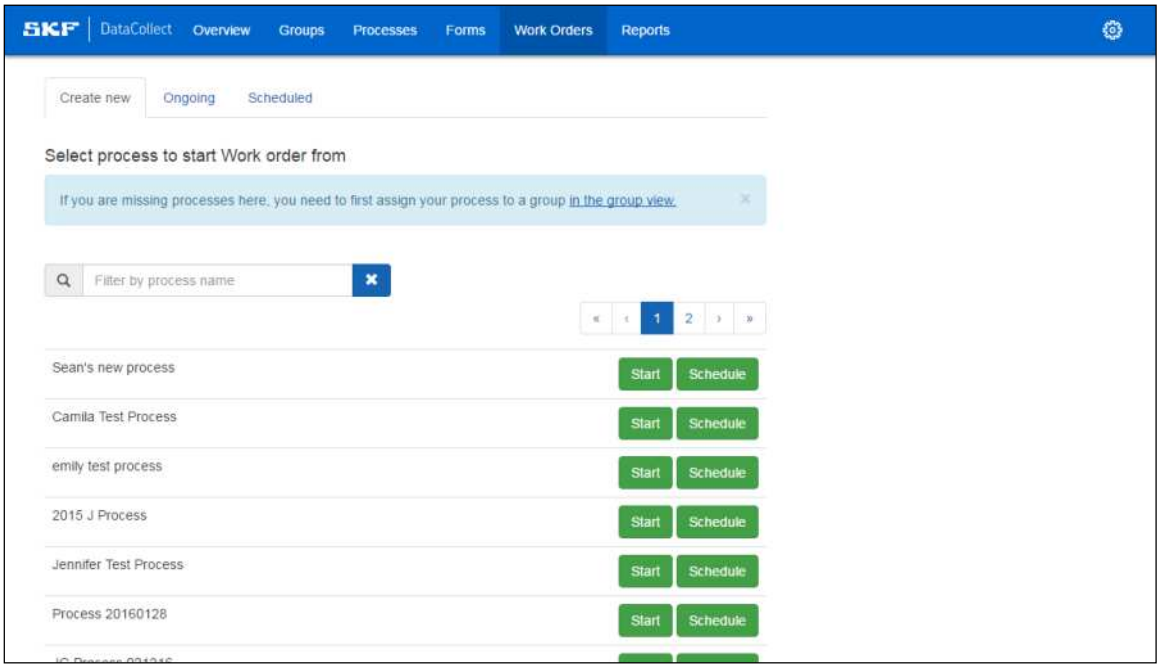


Figure 3 - 46.
The **Work Orders** View.

The following tabs are available:

Create new – displays all processes for which new work orders can be created.

Ongoing – displays all previously created work orders that are still in progress or have been completed.

Scheduled – displays all previously created work orders that are scheduled for completion at a later date.

Create new tab

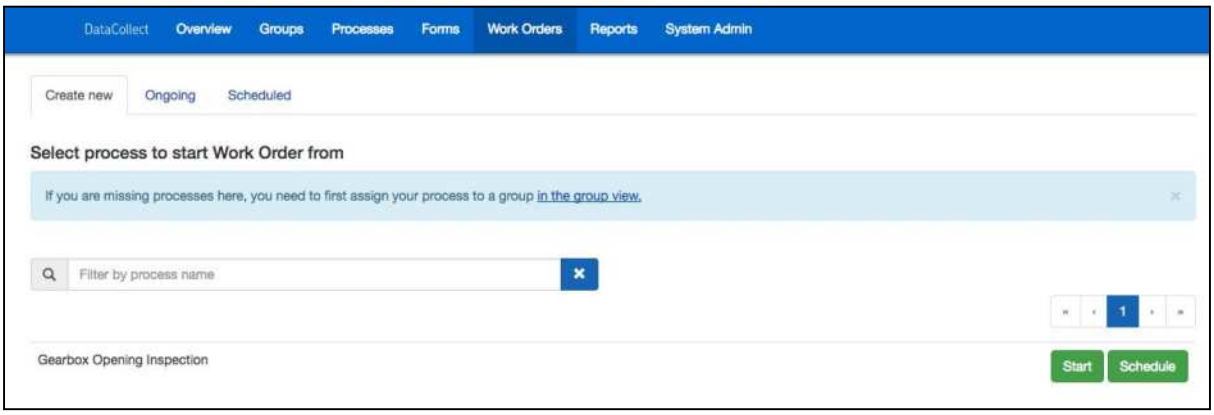


Figure 3 - 47.
Work orders View **Create new** Tab.

The **Create new** tab contains the following elements:

Select process to start Work order from list – displays all processes for which new work orders can be created.

- ➢ If no processes appear in this list, you must first assign one or more process(s) to a group in the Groups view.

Filter – Filters list to those processes with names containing the text entered.

Start – Initiates creation of a work order for the corresponding process.

Schedule - Initiates creation of a scheduled work order for the corresponding process.

To filter the list for one or more specific process(es):

- Enter a known process name into the filter field. The list will update to display those processes with **Name** values that contain the text entered.

To create a new work order:

- Locate the process for which you intend to create a work order and click its corresponding **Start** button. A **New Work order details** screen will appear.

  - ➢ If you cannot locate the desired process, you may need to assign that process to a group in the Groups view.

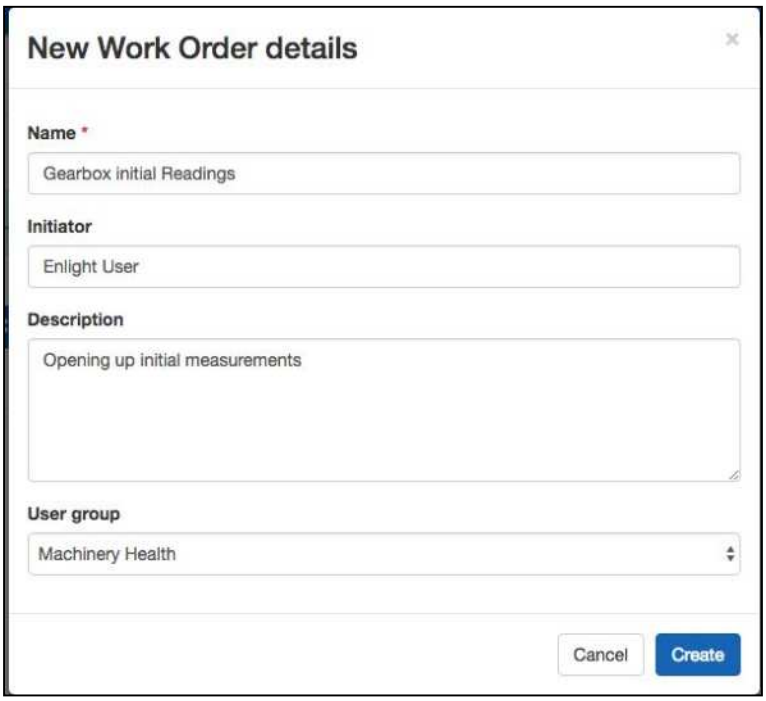


Figure 3 - 48.
New Work order details Screen.

- Enter a **Name**, **Initiator** and **Description** for the new work order.
- If the work order is to be assigned to a group other than the default **User group** displayed, click the drop-down arrow to select a different group from the menu.
- Add/edit **Additional Info** as appropriate.
- Click **Create**. The new work order will now be assigned to the designated user group and appear on the **Ongoing tab.**

To create a new scheduled work order:

- Locate the process for which you intend to create a work order and click its corresponding **Schedule** button. A **New Work order details** screen will appear.

  - ➢ If you cannot locate the desired process, you may need to assign that process to a group in the Groups view.

- Enter a **Name**, **Initiator** and **Description** for the new work order.
- If the work order is to be assigned to a group other than the default **User group** displayed, click the drop-down arrow to select a different group from the menu.
- Add/edit **Additional Info** as appropriate.
- Click **Create**. A **Scheduling Settings** screen will appear.

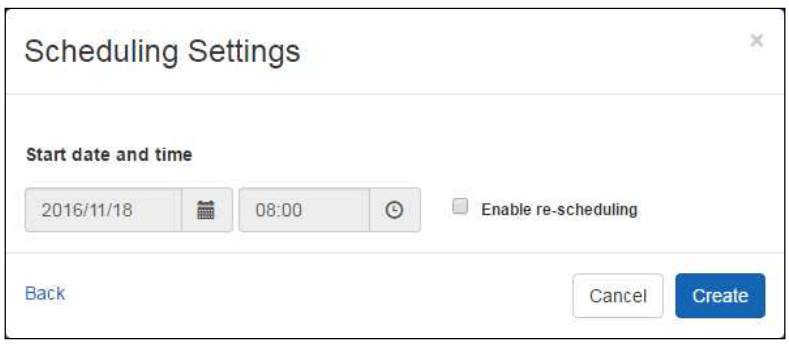


Figure 3 - 49.
Scheduling Settings Screen.

- Select a **Start date and time** for the work order.
- Select (check) **Enable re-scheduling** to allow for rescheduling of this same work order.
- Click **Create**. The new work order will now be assigned to the designated user group and appear on the **Scheduled tab.**

Ongoing tab

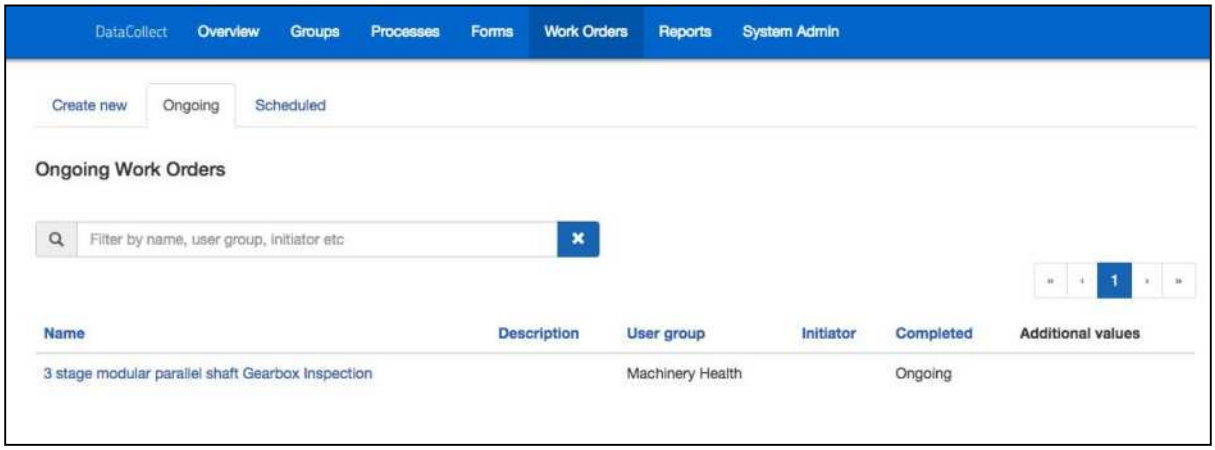


Figure 3 - 50.
Work orders View **Ongoing** Tab.

The **Ongoing** tab contains the following elements:

Ongoing Work orders list – displays all previously created work orders that are still in progress.

Filter – Filters list to those work orders with **Name**, **User group** or **Initiator** values that contain the text entered.

Name – displays the work order name. Click to navigate to the **Groups** view for the group to which the work order is assigned.

Description – displays the work order description.

User group – identifies the user group to which the work order is assigned.

Initiator – identifies the administrator who initiated the work order.

Completed – indicates whether the work order is completed or still ongoing.

- Click any of the headers above once to sort the list based on that column's values in ascending order. Click the same header again to sort by that column's values in descending order.

Additional values – displays the addition information entered for this process on the **Processes > Additional Information** tab.

To filter the list for one or more specific work order(s):

- Enter a known name, user group or initiator into the filter field. The list will update to display those processes with **Name**, **User Group** or **Initiator** values that contain the text entered.

To unassign a work order from a group:

- Locate the work order in the list and click on its **Name** (hyperlink). The **Groups** view will appear with the group to which the work order is assigned already loaded and the **Work orders** tab displayed.
- Locate the work order and click **Delete**.
- When prompted to confirm deletion of the work order (in other words, removal from the group), click **OK**.

The work order will then no longer be assigned to the group, so it will reappear on the **Work orders** view's **Create new** tab.

Scheduled tab

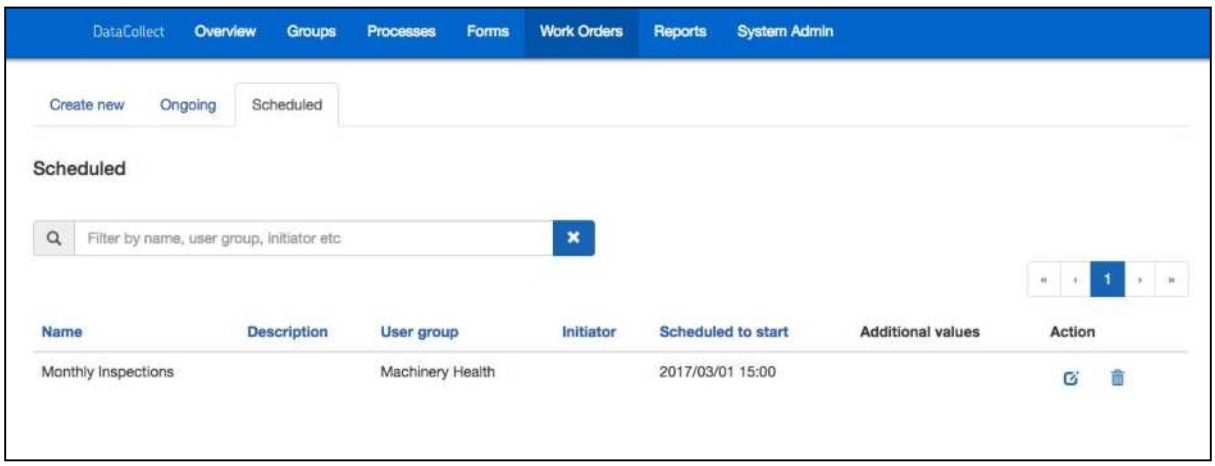


Figure 3 - 51.
Work orders View **Ongoing** Tab.

The **Scheduled** tab contains the following elements:

Scheduled Work orders list – displays all previously created work orders that are scheduled.

Filter – Filters list to those work orders with **Name**, **User group** or **Initiator** values that contain the text entered.

Name – displays the work order name.

Description – displays the work order description.

User group – identifies the user group to which the work order is assigned.

Initiator – identifies the administrator who initiated the work order.

Scheduled to start – indicates the date and time scheduled for the work order to start.

➢ Click any of the headers above once to sort the list based on that column's values in ascending order. Click the same header again to sort by that column's values in descending order.

Additional values – displays the addition information entered for this process on the **Processes > Additional Information** tab.

Action – includes an edit button and a remove button.

To filter the list for one or more specific work order(s):

- Enter a known name, user group or initiator into the filter field. The list will update to display those processes with **Name**, **User Group** or **Initiator** values that contain the text entered.

To unassign a scheduled work order from a group:

- Locate the work order in the list and click on the remove button in the **Action** column.
- When prompted to confirm deletion of the work order (in other words, removal from the group), click **OK**.

Working in the Reports View

In the **Reports** view, you can download monthly audit reports, generate and send company group reports, and generate collection performance reports.

Click the **Reports** button at the top of the web interface to display the **Reports** view.

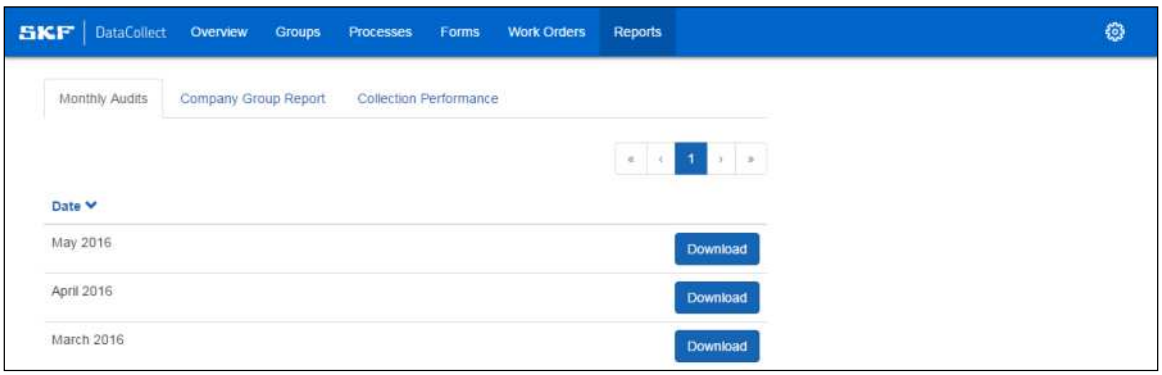


Figure 3 - 52.
The **Reports** View.

The following tabs are available:

Monthly Audits – displays all monthly audits available for download.

Company Group Report – enables you to generate the current day's company group report and email it to yourself.

Collection Performance Report – enables you to generate reports with time data for questions and collections.

Monthly Audits tab

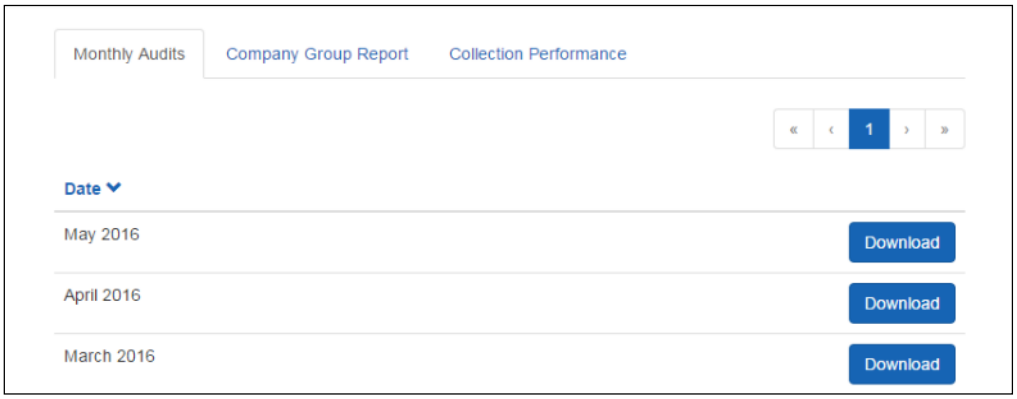


Figure 3 - 53.
Reports View **Monthly Audits** Tab.

To locate and download a monthly audit:

- If necessary, click the page navigation arrow buttons to navigate between multiple pages of monthly audit report records.
- If desired, click the **Date** column header to sort the list by date in ascending order. Click the header again to sort the list by date in descending order.
- Locate the desired month's audit report and click its corresponding **Download** button. The file will appear in your browser's downloads area.
- Click on the file to open it (or on the drop-down arrow for more options).

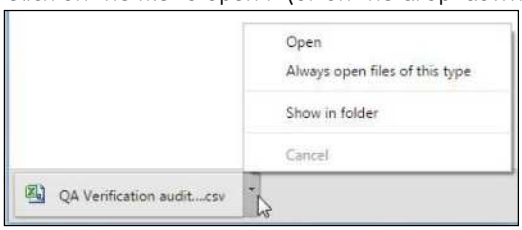


Figure 3 - 54.
Download Options Menu.

Company Group Report tab

Figure 3 - 55.
Reports View **Company Group Report** Tab.

To generate and email yourself a copy of today's company group report:

- Click **Generate company group report**. The system will generate today's company group report and send you an email with a copy of the report attached.

Collection Performance tab

Figure 3 - 56.
Collection performance tab.

To generate a collection performance report:

- Select a month for which you wish to generate the report.
- Click **Generate report**. The system will generate an Excel report.

4
Form Builder

Form Builder Overview

In the **Form Builder** view, you can create new forms which will be available in the web interface. Once they have been saved and published, the forms can be assigned to users/groups.

Click the **Forms** button at the top of the web interface to display the **Forms** view, and then click the **Use Form Builder to create Forms** button to open the **Form Builder** view.

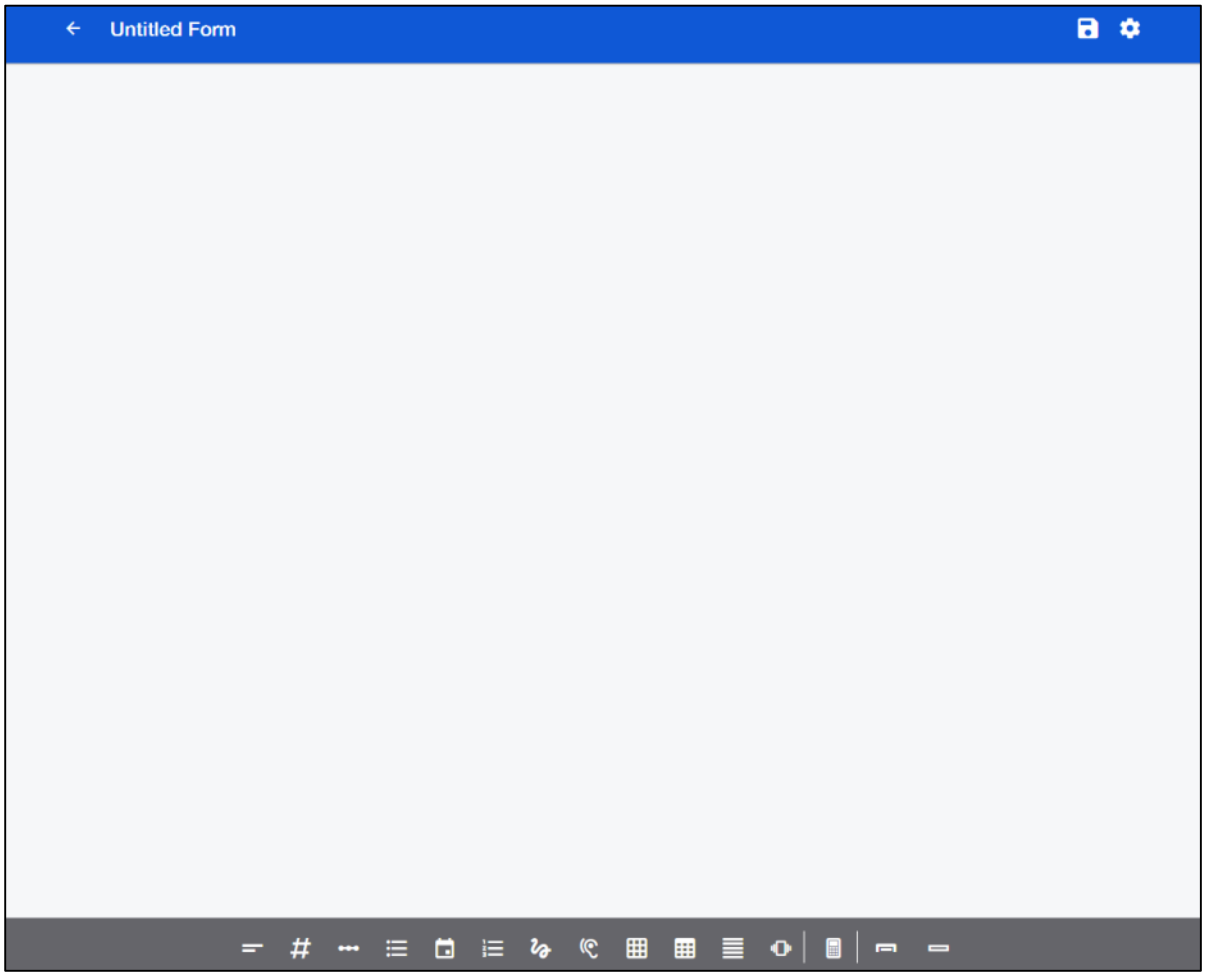


Figure 4 - 1.
The Form Builder view for an empty form.

The **Form Builder** view contains the following elements:

Return – click to return to **Forms** view.

Form Name (default Untitled Form) - displays the Form Name (editable field).

Save - click to save created form.

Settings - click or drag and drop to view and edit settings for the form.

Category - click or drag and drop to add a question category.

Section - click to add a section.

Question types - click on an icon or drag and drop to add a question type to the new form.

Return

Click return to return to the **Forms** view.

- Once you click the return button, you return to the **Forms** view and only the changes made before saving will be available as a form for publishing (or editing/updating).

Form Name

This field shows the name of the form. The field is editable so you can edit the name at any time. This can also be done from the form settings screen.

Save

Click this icon to save the current form. This should be done before leaving the **Form Builder** view to ensure that all changes are saved.

Settings

Click the settings icon to the right in the **Form Builder** view to open the **Settings** screen.

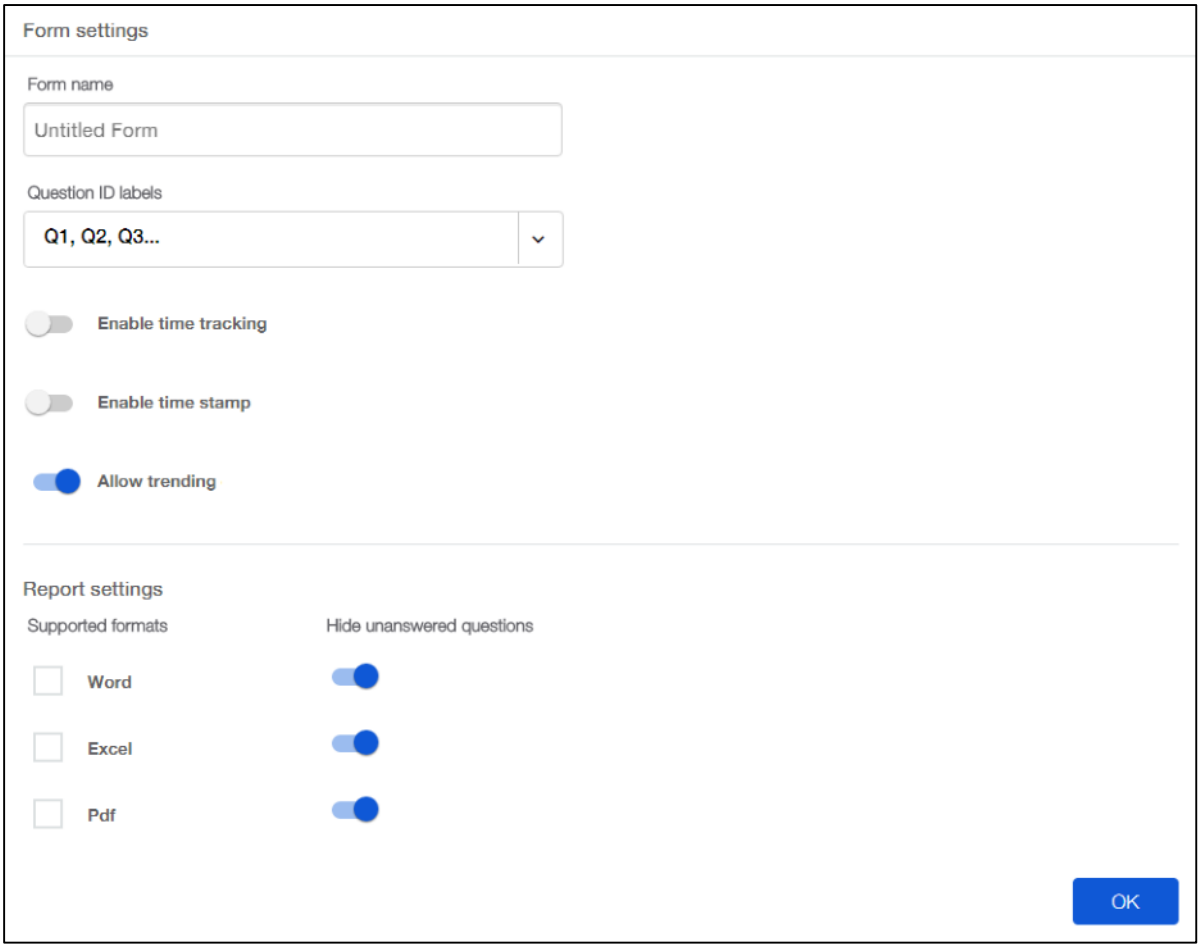


Figure 4 - 2.
Settings view for forms.

Form name

Displays current form name and can be edited.

Question ID labels

Displays current ID label type. In the drop-down list, you select from Q1, Q2, Q3 or 1, 2, 3.

Enable time tracking

Click the switch to enable time tracking for the app. When enabled, the app will record the time it takes an app user to complete a collection and send this information to the web interface.

Enable time stamp

Click the switch to enable a time stamp for the answer of a question.

Allow trending

Click the switch to allow trending for vibration and numeric questions.

Report settings

Displays the available formats that can be selected as supported formats when creating reports in the **DataCollect** app. Next to each format on the right, there are switches with the option to hide unanswered questions (click to hide).

OK

Click **OK** to close the settings screen (or press Esc button on your keyboard).

Create a form

To create a form in Form Builder:

- Click or drag and drop a question type at the bottom of the view. The new question will appear on the screen.
- Fill in the information needed for each question and continue to add all questions required in your form.
    - ➢ Question categories and question sections can be added at any time to categorise and sort the questions.
- Click **Save** to upload the form to the web interface.

Category

A question **category** is a group of related questions and/or sections. You may wish to group questions together under question categories within the work process, for example to define different parts in an inspection (such as categories for pumps, fans and turbines) etc.

To add a category:

- Click or drag and drop the category icon at the bottom of the screen to add the category to the form. Once added, the category can be titled and described. Subsequently categorise the questions by dragging each question to the desired category.
    - ➢ The new category will appear at the bottom of the form by default. You can move it around by dragging it to the desired position.
    - ➢ To hide a category's content, click the arrow above each category title.

Figure 4 - 3
Created category

To delete a category

- Click the **Delete** button to delete a category and *all* its underlying content.

Figure 4 - 4.
Delete category

To duplicate a category

- Click the **Duplicate** button to duplicate a category and *all* its underlying content.

Figure 4 - 5.
Duplicate category

Section

A **section** further groups questions together to make the data collection procedure clearer to the app user.

- ➢ Sections are optional.
- ➢ To hide a section's content, click the arrow next to each section title.

To create a section

- Click or drag and drop the section's icon at the bottom of the screen and the section will appear in the form. Once created, the section can be titled.
  - ➢ The new category will appear at the bottom of the form by default. You can move it around by dragging it to the desired position.

Figure 4 - 6.
Created section.

To delete a section

- Click the **Delete** button to delete a section and *all* its underlying content.

Figure 4 - 7.
Delete section.

To duplicate a section

- Click the Duplicate button to duplicate a section and all its underlying content.

Figure 4 - 8.
Duplicate section.

Question Configurations

There are thirteen different types of questions to choose from when creating a form. Each question has a question ID label (Q1, Q2, Q3… or 1, 2, 3…) and a question title. There are also configurations applicable to all questions. These are specified below.

Visibility Rules

When clicking the **Visibility rules** icon in the upper right corner of a question, the visibility rules area will be displayed. The area contains the following elements:

Show/Hide – Drop-down list with show/hide.

Question selection – Drop-down list containing previous questions.

Rule(s) – Drop-down list(s) containing rules.

Add rule – Button for adding a rule.

Visibility rule enabled – Switch to enable or disable the rule(s).

OK – Click OK to save changes.

Figure 4 - 9.
Visibility Rules

Show/Hide

Select between showing or hiding the current question if the following rule is valid.

Question selection

Select which previous question should be part of the rule(s).

Rule(s)

Rules applicable for selected question.

Add rule

Click to add a new rule.

Visibility rule enabled

Click the switch to enable the rule(s). The switch will turn blue when enabled.

OK

Click OK to save changes.

Help Information

When clicking the **Help information** icon in the upper right corner of a question, the help area will be displayed. The area contains the following elements:

Help text box – Text box to provide the app user with help information.

Drag and drop zone – Drag and drop zone for additional help files.

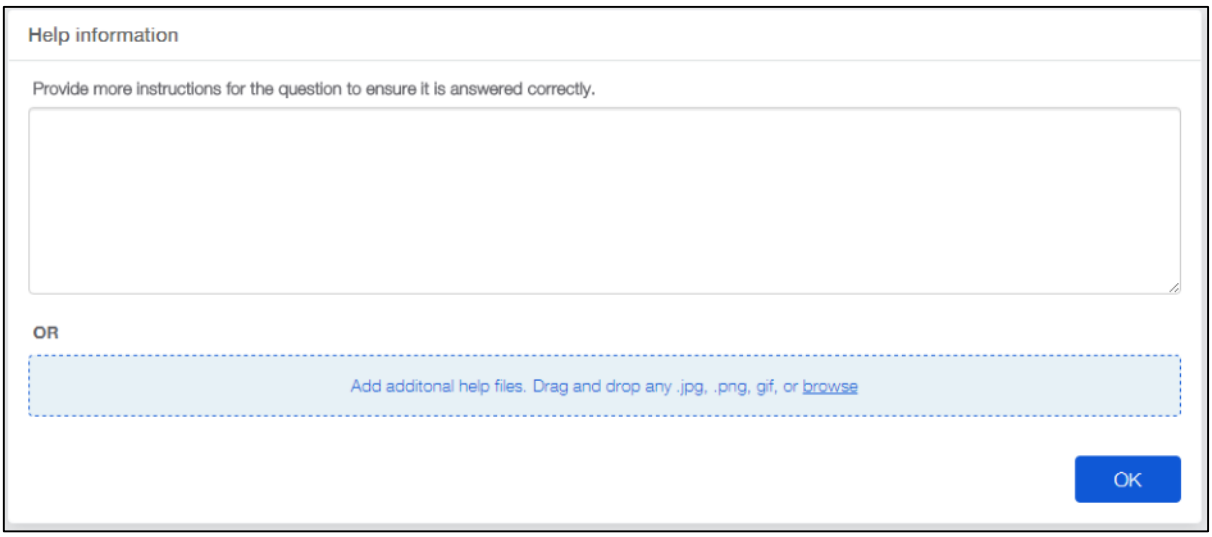


Figure 4 - 10.
Help information

Help Text Box

Enter text to be displayed in the app to assist the user as necessary with the corresponding question. The app includes an "i" next to any questions with help information (text or image). When the app user taps the "i", the help text is displayed. If a hyperlink is included, the user can tap it to load the applicable web page in their device's default browser.

Drag and drop zone

Drag and drop images to be displayed in the app to assist the user as necessary with the corresponding question. You can also browse for one or multiple files. Images must be in .jpg or .png format.

Add Image

Click the **Add image** icon in the upper right corner of a question to browse for an image to display below the current question text in the app.

Delete Question

Click the **Delete** icon in the upper right corner of a question to delete a question.

Duplicate Question

Click the **Duplicate** icon in the upper right corner of a question to add a copy of a question. The copy will be added just below the original question.

Code Scanner

When enabled by the administrator, the user can use a code scanner as a means of obtaining machine information (ID, type, bore size, rpm, etc.) with a simple scan of an EAN barcode or QR code.

Trending

When allowed by the administrator in the settings screen (see **Settings**), trending can be enabled for individual numeric and vibration questions.

- When trending is enabled for vibration questions, velocity, temperature and enveloped acceleration thresholds must be preconfigured.

Diagnostics

When enabled by the administrator, the Diagnostic request feature will be visible and active during data collection of vibration questions that have this configured.

- Trending and Diagnostic request configurations cannot be active simultaneously.

Notes

When enabled by the administrator, notes can be added to the question by the app user.

Audio

When enabled by the administrator, audio recordings can be added to the question by the app user.

Image

When enabled by the administrator, images can be added to the question by the user.

Question Types

There are thirteen different question types to choose from when creating a form. These are presented below:

Icon	Question Type
	Text
	Numeric
	Slider
	Choice
	Date
	Rank
	Signature
	Decibel Meter
	Matrix
	Table
	List
	Vibration
	Calculation

Figure 4 - 11.
Question types.

Text Questions

Text questions enable entry of a text in a free-form text box.

Figure 4 - 12.
Text question.

Default text

Here a predefined answer can be entered. The user can choose to answer the question with the predefined text or enter a new text in the text box.

Enable the EAN/QR code scanner

A text question can be answered with an EAN or a QR code if the code scanner is enabled. The user then responds by scanning the appropriate EAN or QR code.

Numeric Questions

Numeric question types enable entry of numeric values that are subject to window and threshold rules. These rules determine whether the answer to the question should result in one of the following conditions: “Good” (green in app), “Alert” (amber) or “Danger” (red).

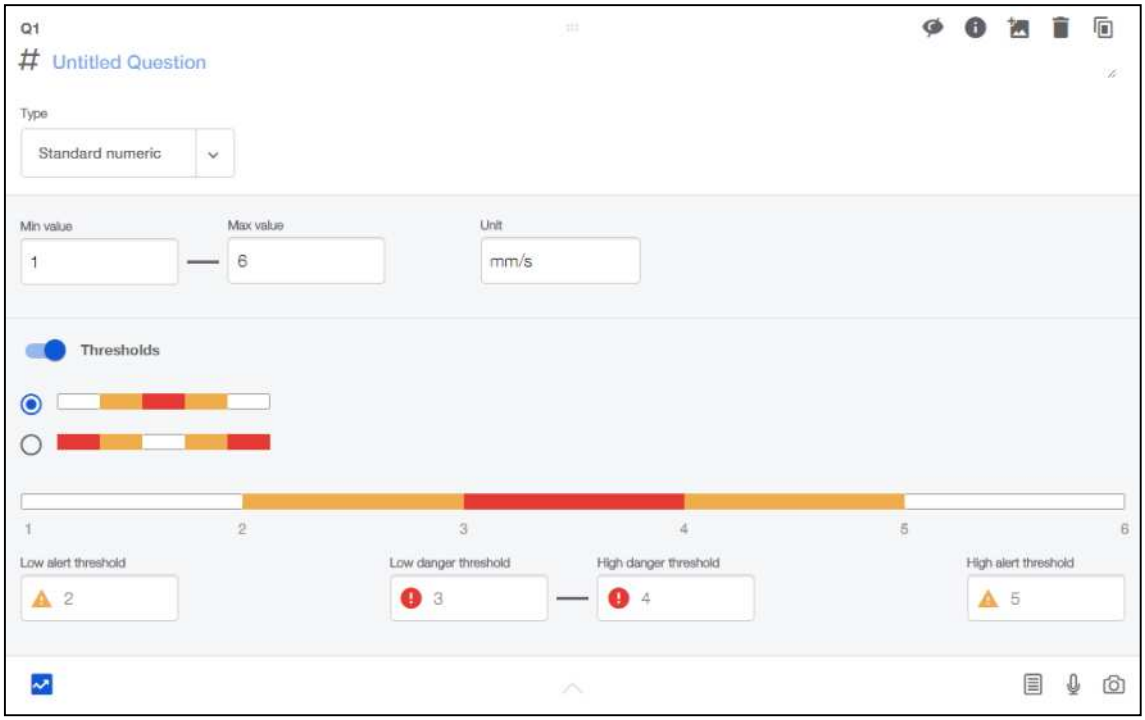


Figure 4 - 13.
Numeric question.

Type

In the drop-down list under Type, select the type of visualisation for the app user:

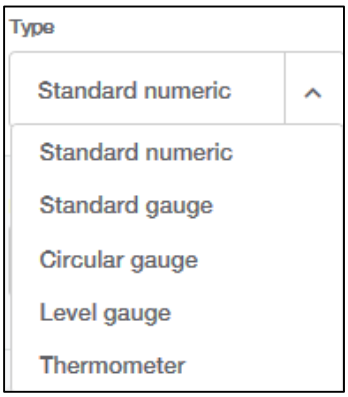


Figure 4 - 14.
Numeric question types.

Limits

Enter a minimum value, maximum value and a unit. The app user must answer with a value within these limits.

Figure 4 - 15.
Numeric question limits.

Thresholds

To enable Thresholds, click the Threshold switch to the right. You can then enter the threshold values for the alarm condition(s).

There are two types of threshold configurations to choose from, “in window” or “out window”. The top option is “in window” and the bottom option is “out window”.

Not all the thresholds need to be entered. The axis shows how the thresholds have been set. If the threshold entered is not valid, an error message will appear.

Figure 4 - 16.
Thresholds for numeric questions.

Trending

Trending can be enabled for numeric question types (to check whether trending is enabled for the form, see Settings). If the trending icon is blue, trending is enabled.

Standard Numeric

Standard numeric questions enable entry of a numeric value in the app. If thresholds are enabled and set, the answer in the app will be shown in a colour representing a condition (red for “Danger, amber for “Alert” and black for “Good”).

Figure 4 - 17.
Standard numeric question.

Standard Gauge

Standard gauge questions are configured to require a minimum value, maximum value and a unit.

The app user will answer the question with a numeric value within the minimum and maximum limits in a graphical interface representing a gauge.

If thresholds are enabled and set, the answer will be visualised in a graphical interface in the app resulting in a condition (red for “Danger, amber for “Alert” and green for “OK”).

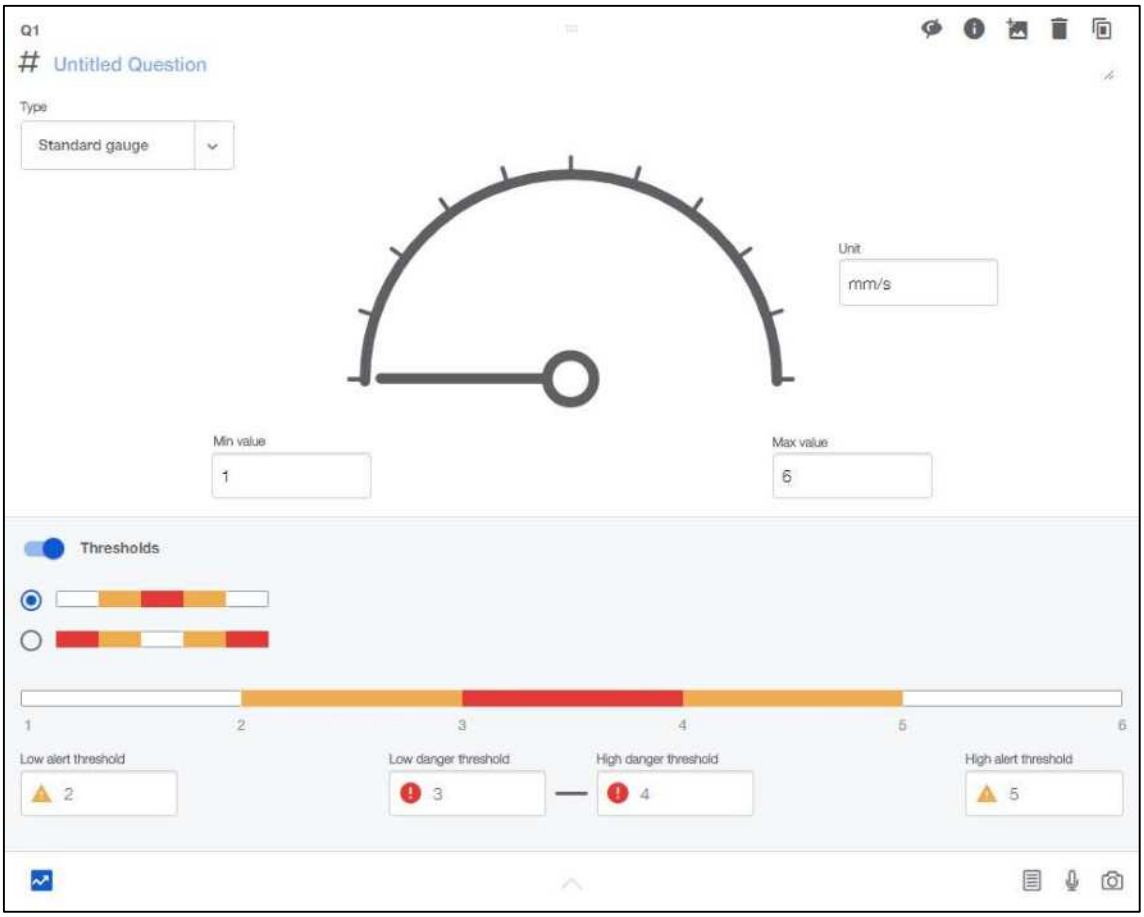


Figure 4 - 18.
Standard gauge question.

Circular Gauge

Circular gauge questions are configured to require a minimum value, maximum value and a unit.

The app user will answer the question with a numeric value within the minimum and maximum limits in a graphical interface representing a circular gauge.

If thresholds are enabled and set, the answer will be visualised in a graphical interface in the app resulting in a condition (red for “Danger, amber for “Alert” and green for “OK”).

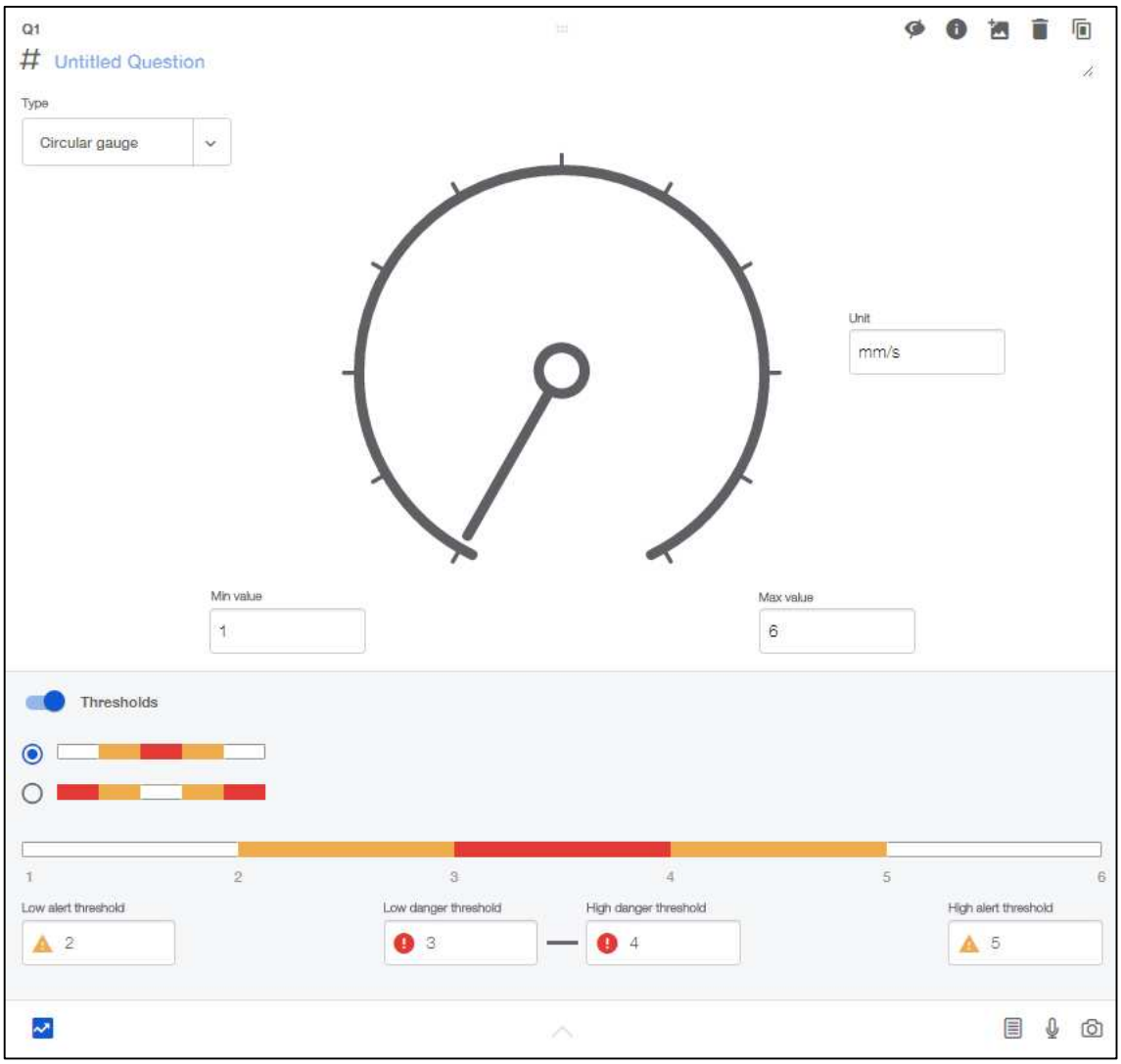


Figure 4 - 19.
Circular gauge question.

Level Gauge

Level gauge questions are configured to require a minimum value, maximum value and a unit.

The app user will answer the question with a numeric value within the minimum and maximum limits in a graphical interface representing a level gauge.

If thresholds are enabled and set, the answer will be visualised in a graphical interface in the app resulting in a condition (red for “Danger, amber for “Alert” and green for “OK”).

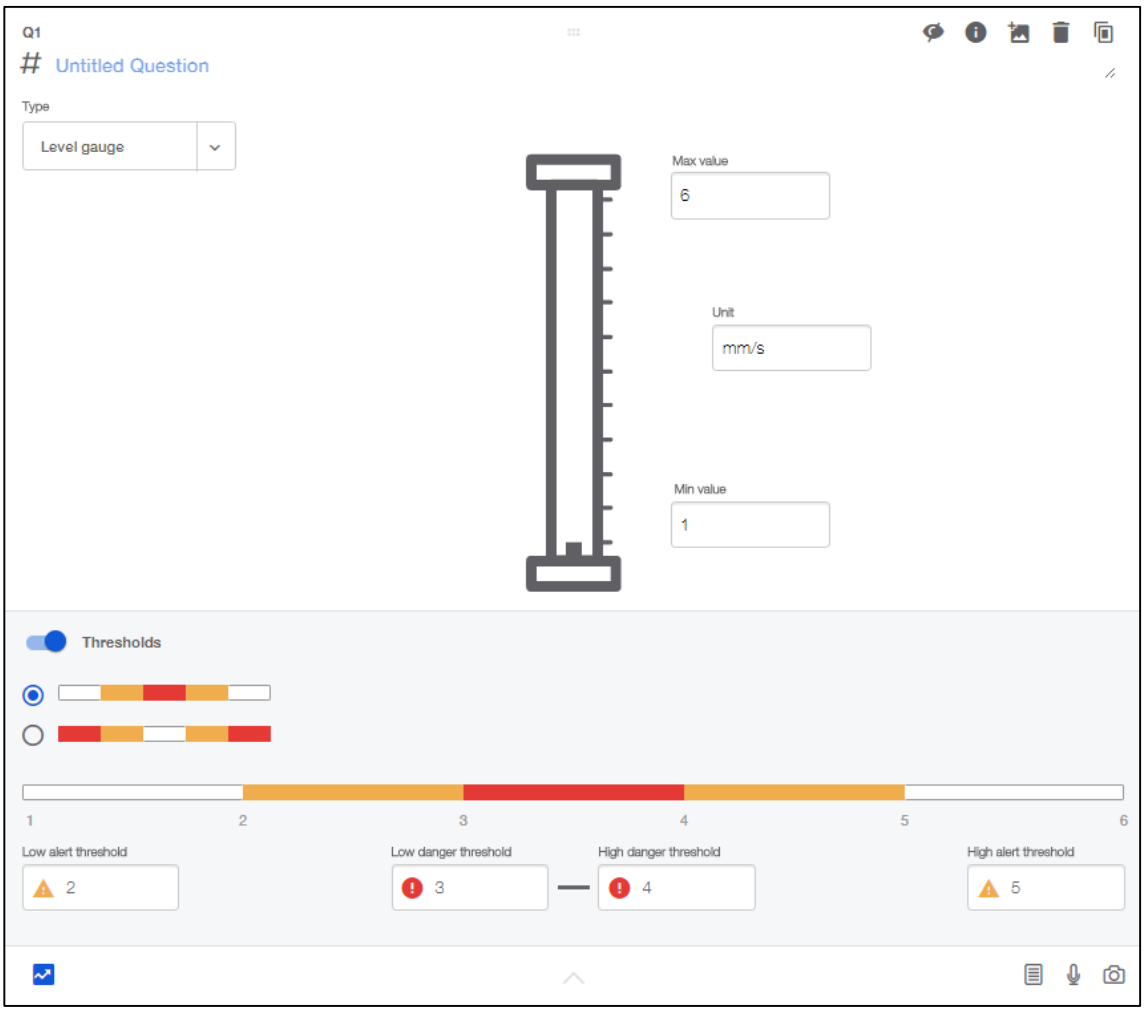


Figure 4 - 20.
Level gauge question.

Thermometer

Thermometer questions are configured to require a minimum value, maximum value and a unit.

The app user will answer the question with a numeric value within the minimum and maximum limits in a graphical interface representing a thermometer.

If thresholds are enabled and set, the answer will be visualised in a graphical interface in the app resulting in a condition (red for “Danger, amber for “Alert” and green for “OK”).

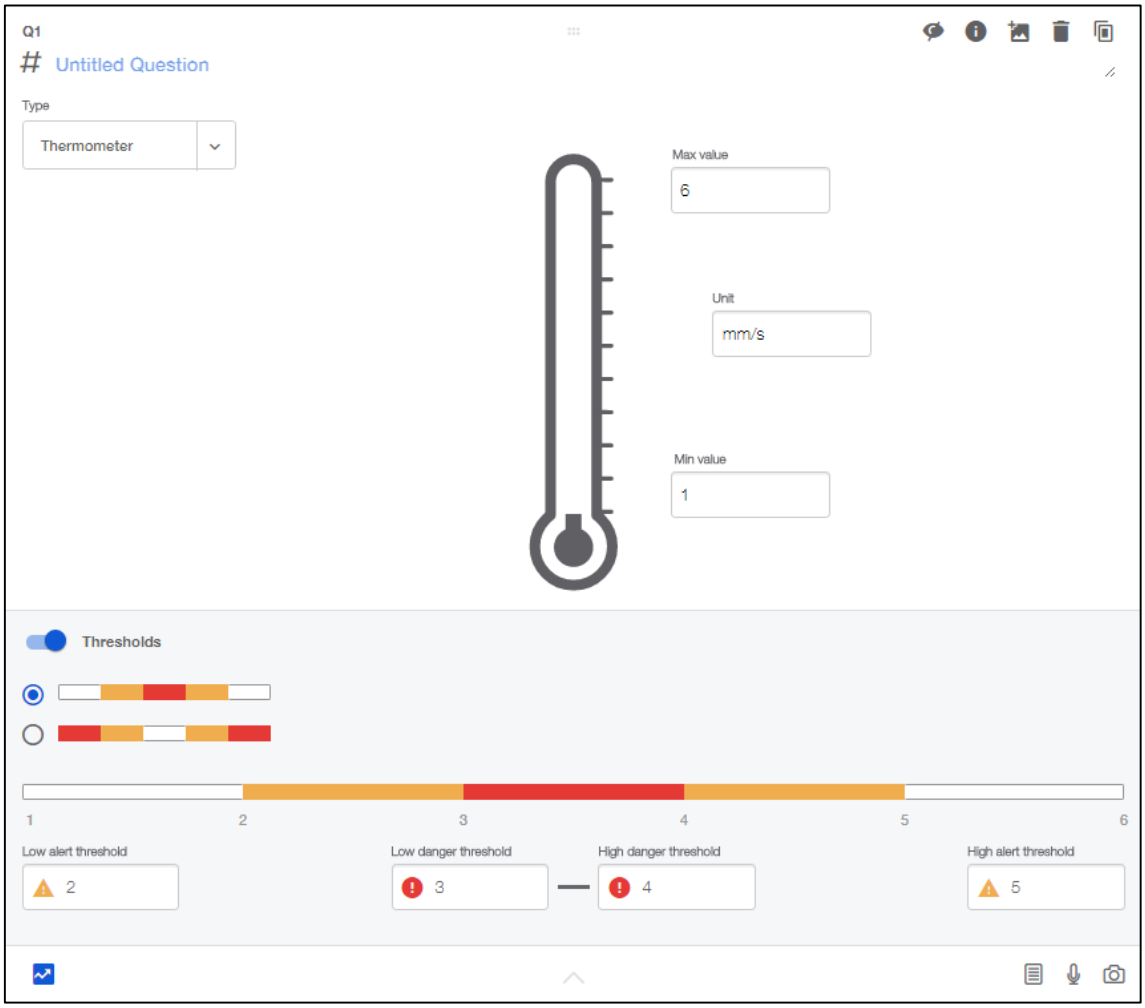


Figure 4 - 21.
Thermometer question.

Slider Questions

Slider questions are configured by entering numeric limits and steps or text choices. The app user will answer a slider question by pulling sliders to positions on an axis. The answers can be a single numeric value, a range or a text choice depending on the type selected.

Figure 4 - 22.
Slider question.

Type

In the drop-down list under Type, select the type to be represented/visualised to the app user.

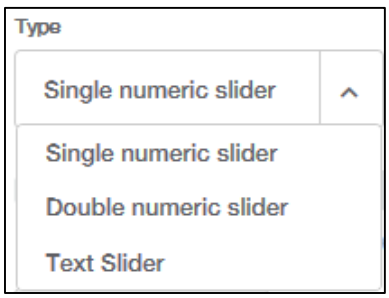


Figure 4 - 23.
Slider question types.

Limits

Enter a minimum and a maximum value (only applicable for numeric slider questions). The user must answer within these limits.

Figure 4 - 24.
Slider question limits.

Steps

Select the number of steps that will show on the axis; 3, 6 or 11. The number of steps determines how many and what values the options have that the user can select when answering the question.

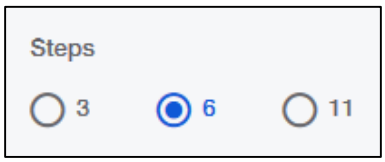


Figure 4 - 25.
Slider question steps.

Single Numeric Slider

A single numeric slider question enables the app user to answer the question by sliding a single slider to a numeric value.

Figure 4 - 26.
Single numeric slider question.

Double Numeric Slider

A double numeric slider question allows the app user to answer the question by sliding a double slider to two numeric values on the axis, creating a range.

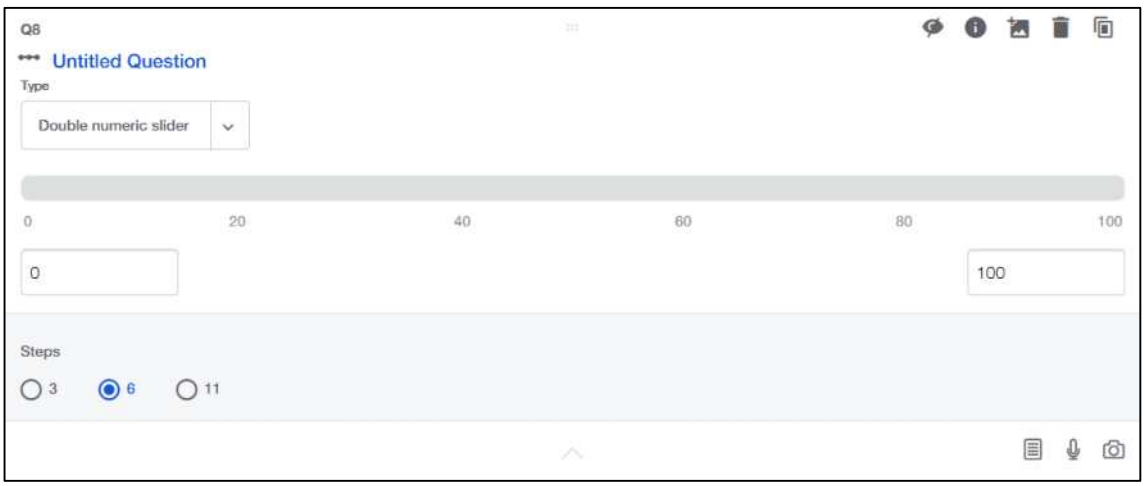


Figure 4 - 27.
Double numeric slider question.

Text Slider

A text slider question enables entry of text in three boxes which become the options for the app user when answering the question. The user will answer the question by sliding to a text box.

Figure 4 - 28.
Text slider question.

Choice Questions

There are two types of Choice Questions, single or multiple choice. Single choice is the default. Click the switch **Enable multiple choice** to the right to create a multiple choice question. The option fields are editable.

In the upper right corner of a choice question, there is a checkbox which allows the app user to select a country when answering the question. This is only applicable for a single choice question.

To add an option:

- Click the **(+) Add option** button to add an option
- Enter a **Name** for the new option. The new options will appear in the options list.

To remove an option:

- Click the **X** button to remove an option. The option will disappear from the options list.

Single Choice

A single choice question allows the user to select only one option when answering the question.

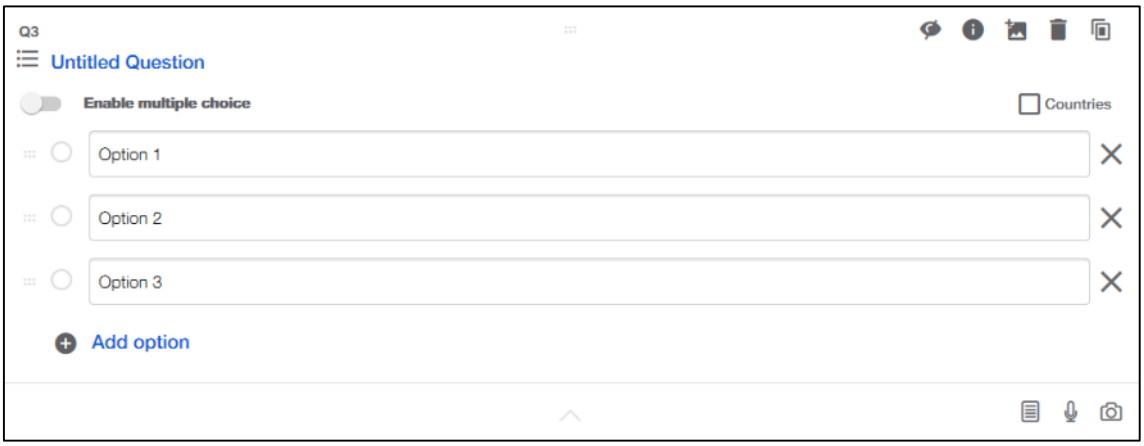


Figure 4 - 29.
Choice question.

Multiple Choice

A multiple choice question allows the user to select one *or more* options when answering the question.

Figure 4 - 30.
Multiple choice question.

Date Questions

Date questions allow the app user to answer the question by scrolling a date roller. Current date is set as default in the app.

Figure 4 - 31.
Date question.

Rank Questions

Rank questions allows entry of several options which the app user will be able to rank when answering the question.

To add an option:

- Click the **(+) Add option** button to add an option
- Enter a **Name** for the new option. The new options will appear in the options list.

To remove an option:

- Click the **X** button to remove an option. The option will disappear from the options list.

To re-order options:

- Click and hold on the move icon ( ) next to the option that you intend to move.
- Drag the option up or down in the options list and release to drop it into place.

Figure 4 - 32.
Rank question.

Signature Questions

Signature questions allow the app user to answer the question with a signature in a manual signature box accompanied by a keyboard text-entry box for user name. Both boxes are required.

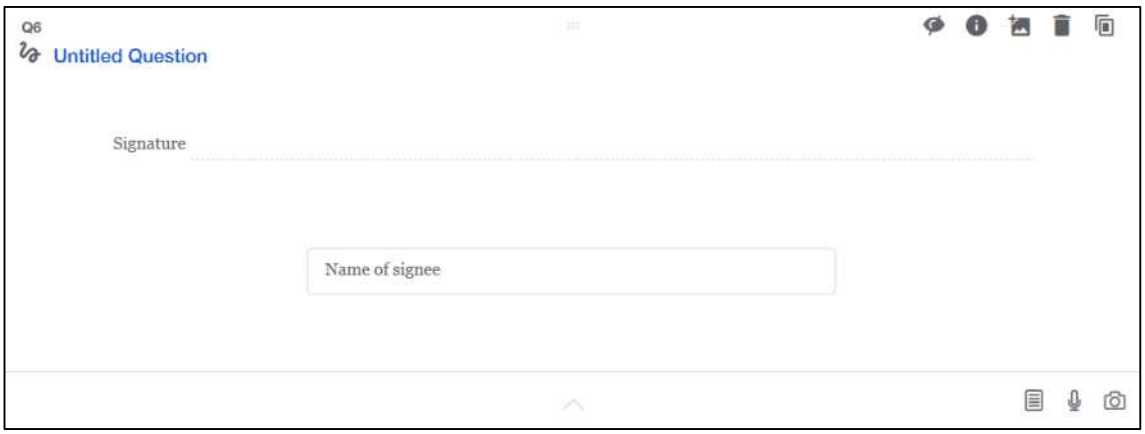


Figure 4 - 33.
Signature question.

Decibel Meter Questions

A Decibel Meter question allows the user to answer the question by performing a noise measurement. The answer is registered in decibels (dB).

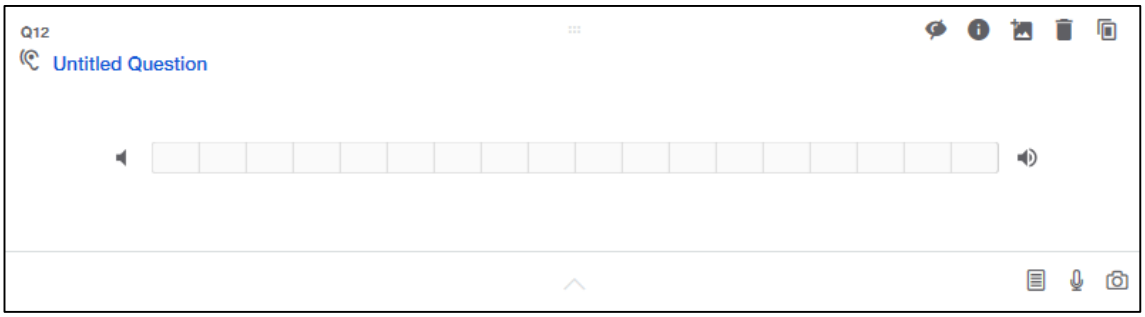


Figure 4 - 34.
Decibel meter question.

Matrix Questions

There are two types of Matrix Questions, single or multiple choice. Single choice is the default. Click the switch **Enable multiple choice** to the right to create a multiple choice question.

The matrix questions consist of three columns and an optional number of rows. Both the rows and columns are editable fields.

To add a row:

- Click the **(+) Add Row** button to add a row.
- Enter a **Name** for the new row. The new row appears in the rows list.

To remove a row:

- Click the **X** button to remove a row. The row disappears from the rows list.

Single Choice

A single choice matrix question enables the user to select only one option for each row when answering the question.

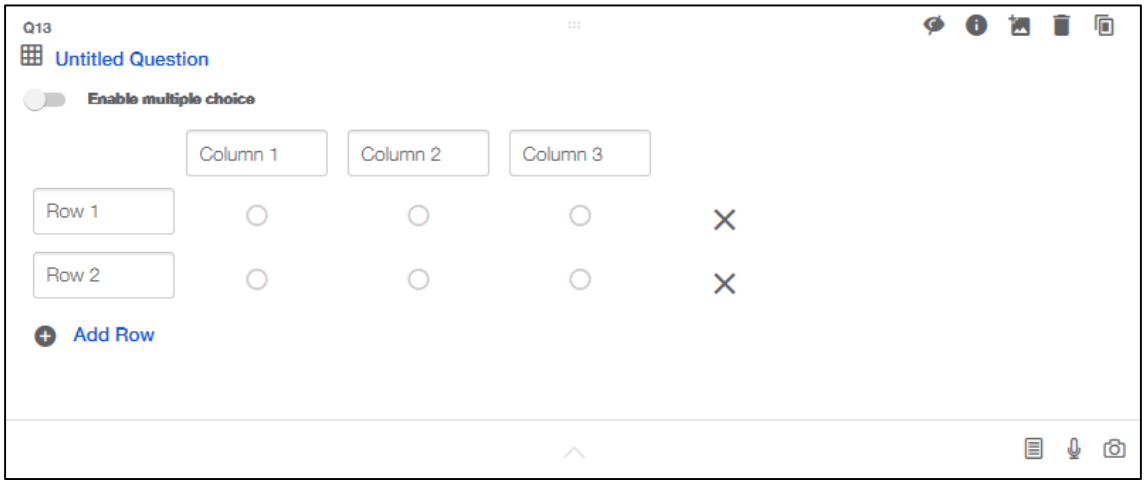


Figure 4 - 35.
Matrix question.

Multiple Choice

A multiple choice matrix question allows the user to select one *or more* options for each row when answering the question.

Figure 4 - 36.
Multiple choice question.

Table Questions

Table Questions enable entry of a question type in each cell.

The following question types are available for each cell (for more information, see fig 4 – 11):

The table questions consist of an optional number of columns and rows. Both the row and column headers are editable fields.

To add a row or a column:

- Click the **(+) Add Row/(+) Add Column** button to add a row or column.
- Enter a **Name** for the new row/column. The new row/column will appear in the rows/columns list.
    - ➢ When adding a new row or column, all cells must contain a question

To remove a row or a column:

- Click the **X** button to remove a row or column. The row/column will disappear from the rows/columns list.

If a question type is not added in each cell, an error message will be displayed until all cells contain a question.

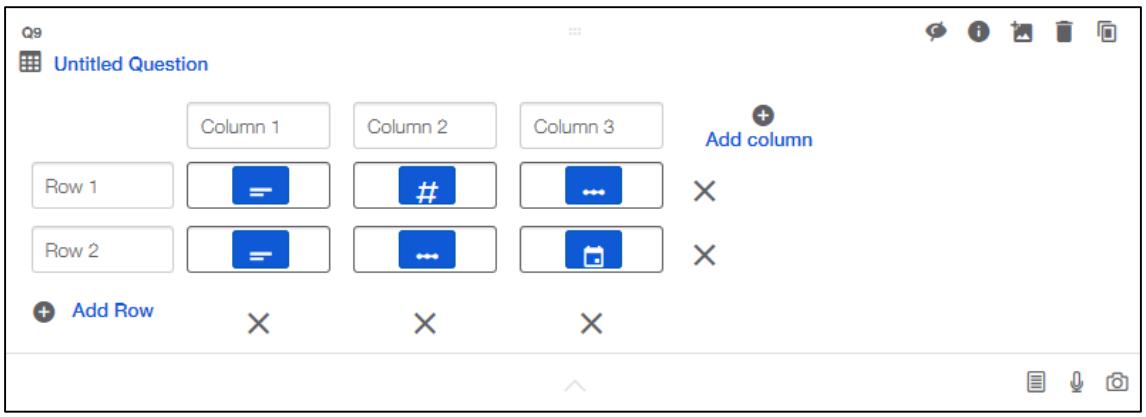


Figure 4 - 37.
Table question.

Question Settings

When clicking questions within a table, settings are configured in the same way as if the question had been standalone (not in a table).

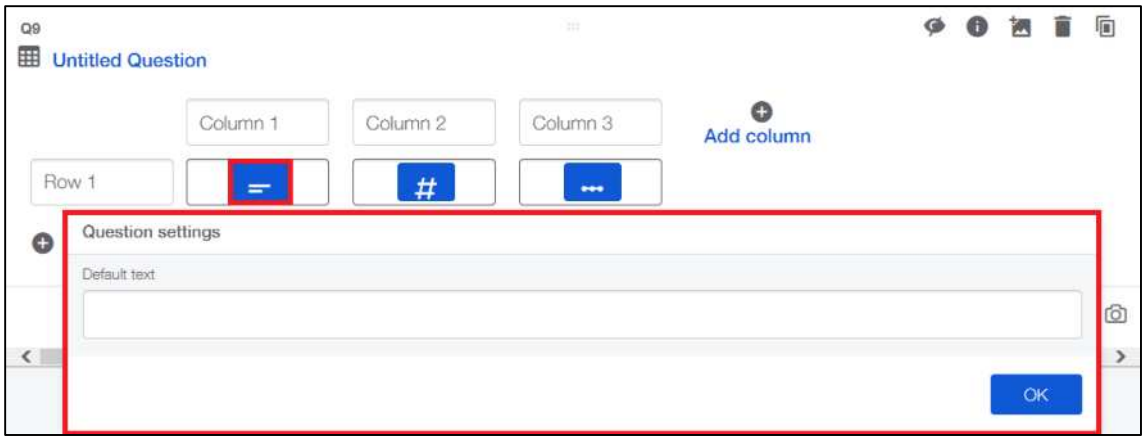


Figure 4 - 38.
Table questions setting.

List Questions

List Questions are configured by entering a question type in each cell.

The following question types are available for each cell (for more information, see fig 4 – 11):

The list questions consist of an optional number of columns and the column headers are editable.

To add a column:

- Click the **(+) Add Column** button to add a column.
- Enter a **Name** for the new column. The new column will appear in the columns list.
    - ➢ When adding a new column, all cells must contain a question

To remove a column:

- Click the **X** button to remove a column. The column will disappear from the columns list.

If a question type is not added in each cell, an error message will be displayed.

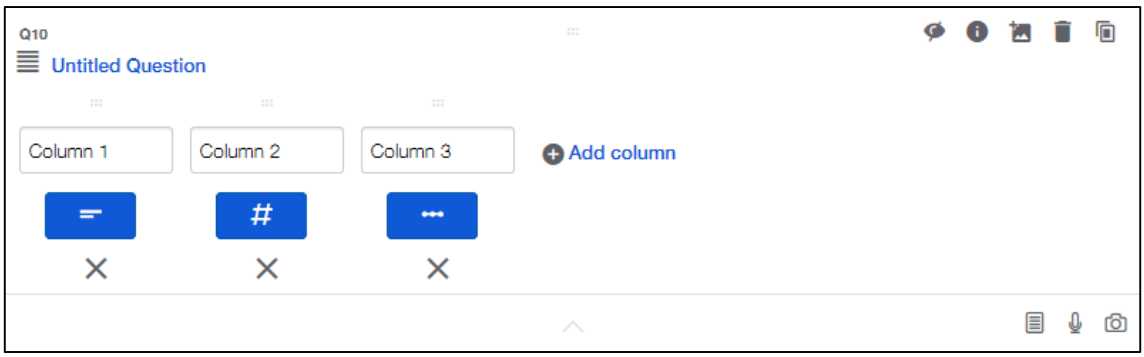


Figure 4 - 39.
List question.

Question Settings

When you click a nested question (question within a list), settings will be configured the same way as for standalone questions. The only difference is that the general settings (show/hide, help information, etc.) are not applicable.

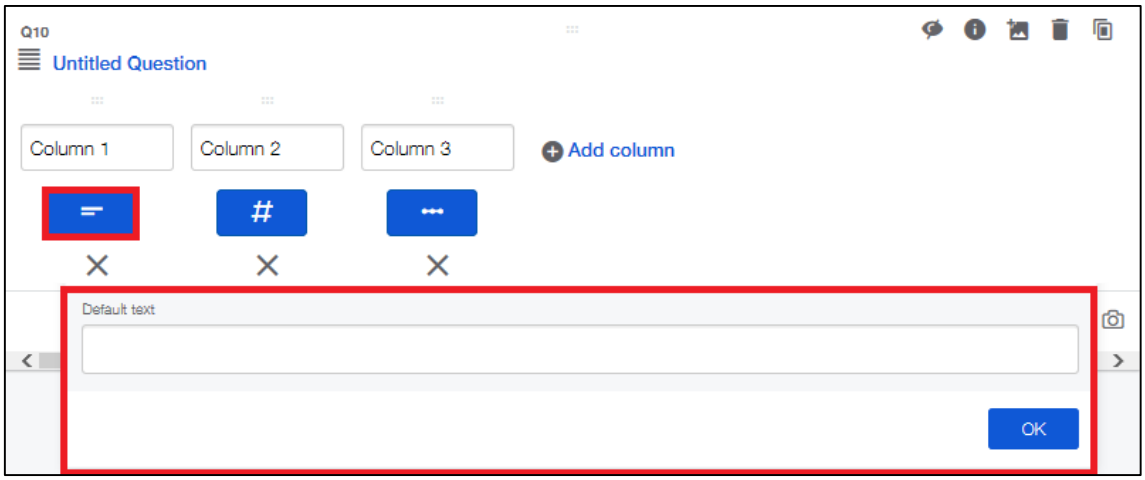


Figure 4 - 40.
List questions setting.

Vibration Questions

Vibration questions enable collections of machine vibration measurements from compatible wireless sensors placed at specific machine points. As with Numeric questions, these measurements are subject to window and threshold rules. These rules determine whether the measurements should result in one of the following conditions: “Good” (green), “Alert” (amber) or “Danger” (red).

When creating a vibration question, a list of measurement points will be displayed. These points correspond to points on the machine where vibration measurements will be performed.

The specific points can be displayed in the user app in either a list or an image (if added). The title of a point in an image can be no more than three letters long.

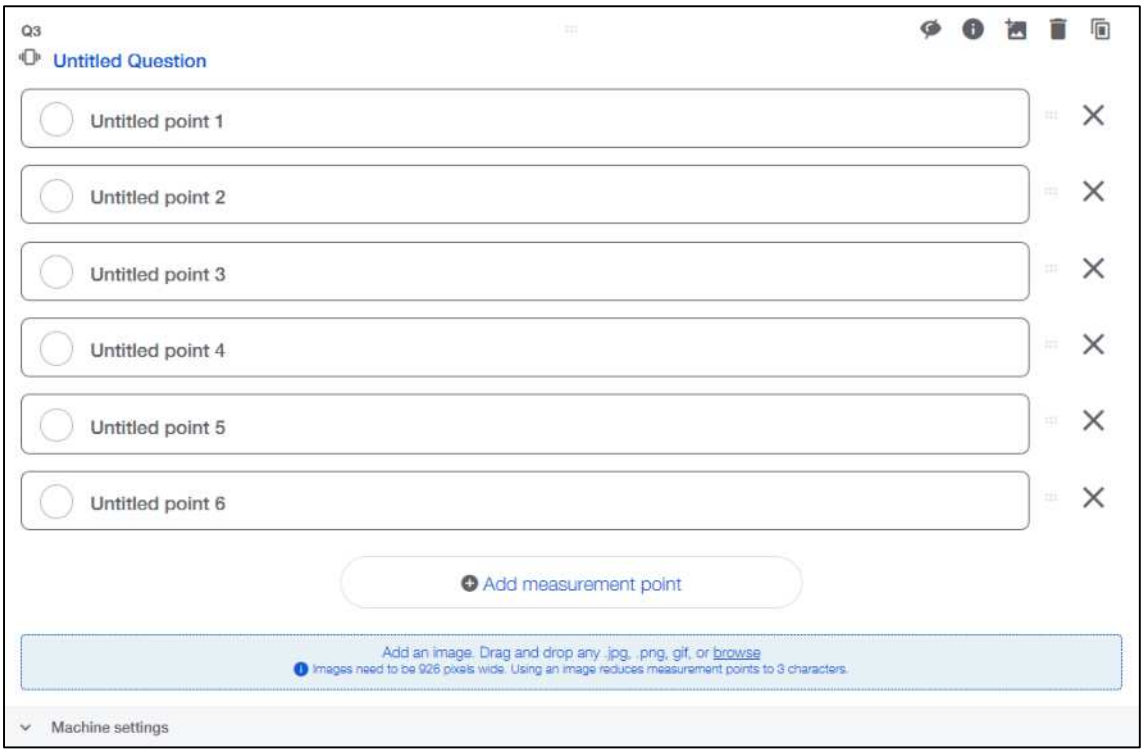


Figure 4 - 41.
Vibration question.

To add a measurement point:

- Click the **(+) Add measurement point** button to add a point.
- Enter a **Name** for the new point. The new measurement point will appear in the points list.

To remove a measurement point:

- Click the **X** button to remove a measurement point. The point will disappear from the points list.

To re-order measurement points:

- Click and hold on the move icon (⁝⁝⁝) next to the point that you intend to move.
- Drag the point up or down in the list and release to drop it into place.

To add an image:

- Drag and drop an image to the blue zone (shown in the image below) or click browse within the zone.

Once an image is added, the points can be moved to the desired position in the image.

Machine settings

Settings can be configured for **Machine ID, Bearing Bore Size, Rotational speed** and **Thresholds**. Machine settings are valid for all measurement points.

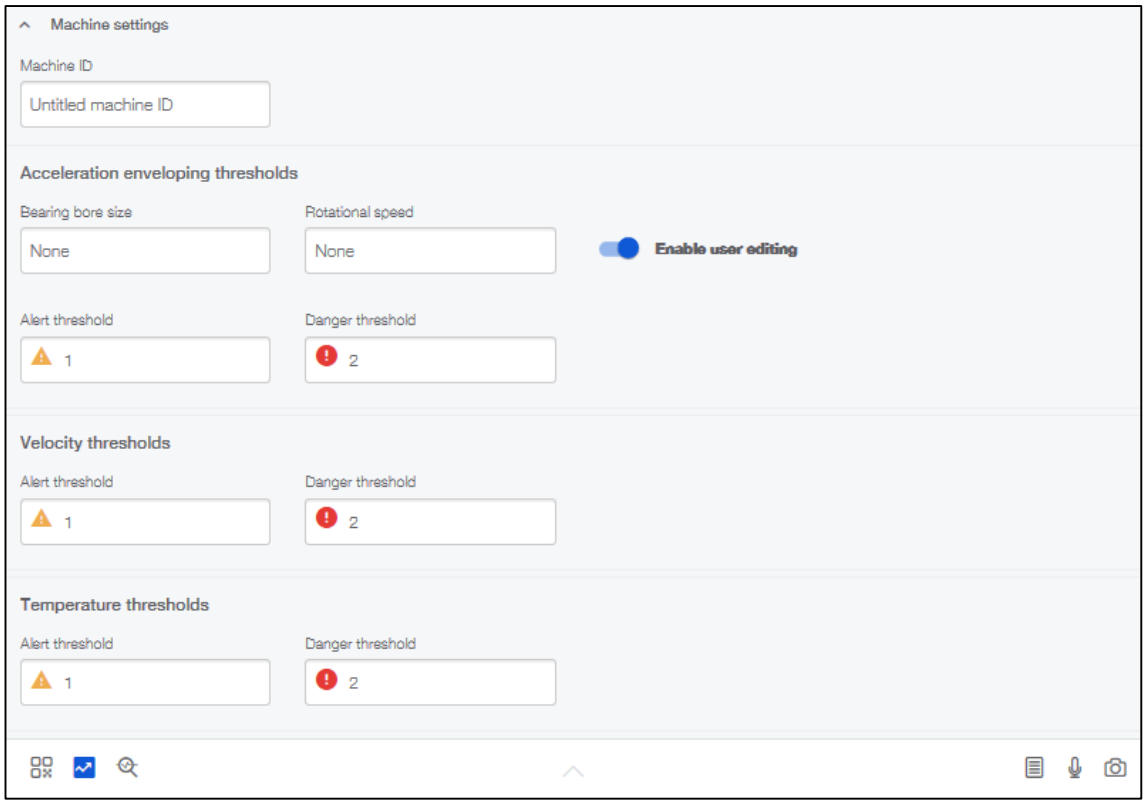


Figure 4 - 42.
Machine settings.

Enable user editing

Click or slide the **Enable user editing** switch to the right to allow the user to configure settings in the app for **Bearing bore size** and **Rotational speed**.

Figure 4 - 43.
Enable user editing.

Measurement point settings

Bearing Bore Size, Rotational speed and **Thresholds** can be configured for individual measurement points. When you click a measurement point, the settings view for the selected measurement point will be displayed.

Measurement settings for individual points override Machine settings.

If settings are configured for one or more points, settings have to be configured for all points individually.

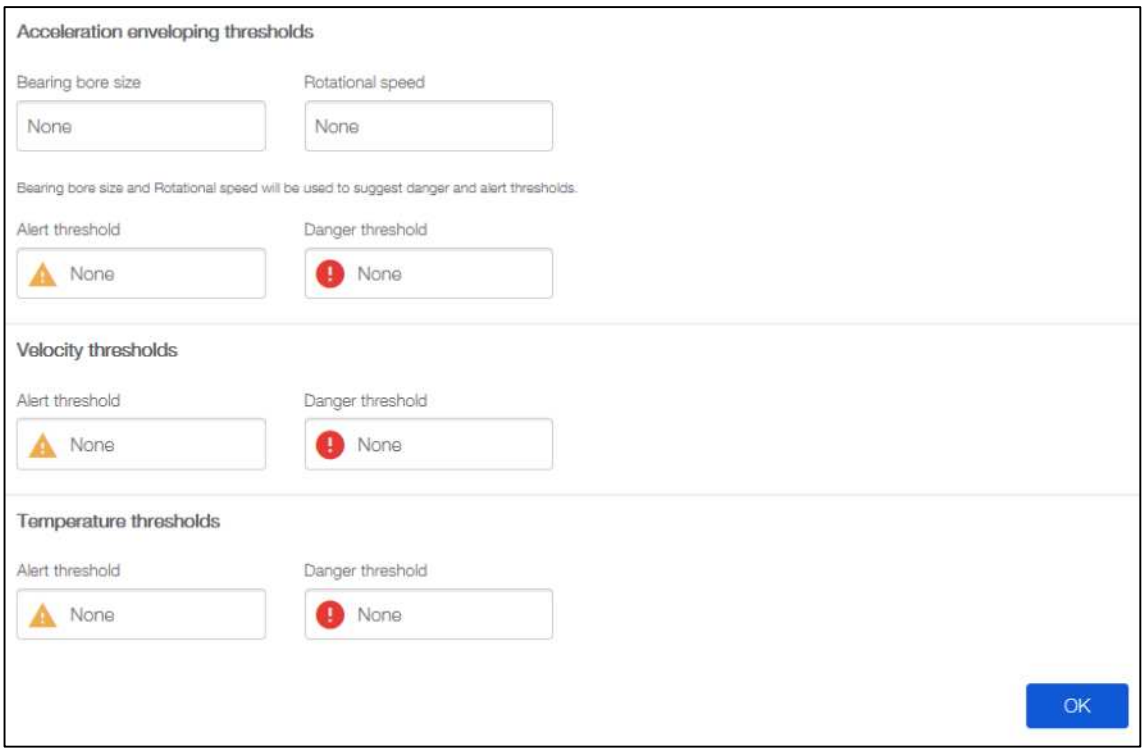


Figure 4 - 44.
Measurement point settings.

Trending

Trending can be enabled for vibration question types (see Settings).

Calculation

The calculation function can make calculations using the results from previous questions with numerical answers.

A calculation is made by adding components to the calculation field. To add a question as a component, scroll in the drop-down list in the bottom right (below the calculation field).

Calculations have no question ID labels (Q1, Q2, Q3, etc).

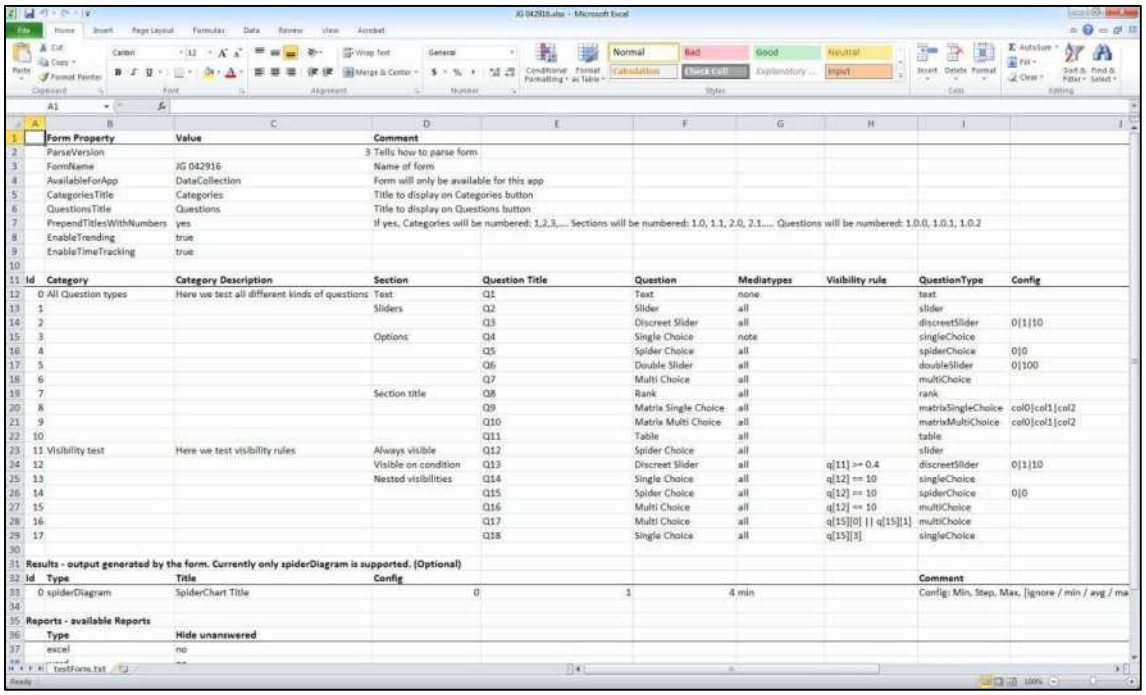
Figure 4 - 45.
Calculation question.

5
Form Template

Form Template Overview

The Excel-based Form template is one way of creating a form that provides the entire structure of each form that the team will use with the DataCollect app. Within this template, you will:

- define form properties such as the form name, question categories and titles, whether question categories should be automatically numbered, and more.
- create question categories, sections and actual questions that will make up the form.
- define how results should be processed and reported.



	Form Property	Value	Comment
2	ParseVersion	3	Tells how to parse form
3	FormName	JG 042916	Name of form
4	AvailableForApp	DataCollection	Form will only be available for this app
5	CategoriesTitle	Categories	Title to display on Categories button
6	QuestionsTitle	Questions	Title to display on Questions button
7	PrependTitlesWithNumbers	yes	If yes, Categories will be numbered: 1,2,3,.... Sections will be numbered: 1.0, 1.1, 2.0, 2.1.... Questions will be numbered: 1.0.0, 1.0.1, 1.0.2
8	EnableTrending	true	
9	EnableTimeTracking	true	

Id	Category	Category Description	Section	Question Title	Question	Mediatypes	Visibility rule	QuestionType	Config
0	All Question types	Here we test all different kinds of questions	Text	Q1	Text	none		text	
1			Sliders	Q2	Slider	all		slider	
2				Q3	Discreet Slider	all		discreetSlider	0|1|10
3			Options	Q4	Single Choice	note		singleChoice	
4				Q5	Spider Choice	all		spiderChoice	0|0
5				Q6	Double Slider	all		doubleSlider	0|100
6				Q7	Multi Choice	all		multiChoice	
7			Section title	Q8	Rank	all		rank	
8				Q9	Matrix Single Choice	all		matrixSingleChoice	col0|col1|col2
9				Q10	Matrix Multi Choice	all		matrixMultiChoice	col0|col1|col2
10				Q11	Table	all		table	
11	Visibility test	Here we test visibility rules	Always visible	Q12	Spider Choice	all		slider	
12			Visible on condition	Q13	Discreet Slider	all	q[11] >= 0.4	discreetSlider	0|1|10
13			Nested visibilities	Q14	Single Choice	all	q[12] == 10	singleChoice	
14				Q15	Spider Choice	all	q[12] == 10	spiderChoice	0|0
15				Q16	Multi Choice	all	q[12] == 10	multiChoice	
16				Q17	Multi Choice	all	q[15][0] || q[15][1]	multiChoice	
17				Q18	Single Choice	all	q[15][3]	singleChoice	

Results - output generated by the form. Currently only spiderDiagram is supported. (Optional)

Id	Type	Title	Config			Comment
0	spiderDiagram	SpiderChart Title	0	1	4 min	Config: Min, Step, Max, [ignore / min / avg / ma

Reports - available Reports

Type	Hide unanswered
excel	no

Figure 5 - 1.
Sample Form Template.

The Form template is structured into five areas which support these operations:

	A	B	C	D	E	F
1		**Form Property**	**Value**	**Comment**		
2		ParseVersion	3	Tells how to parse form		
3		FormName	JG 042916	Name of form		
4		AvailableForApp	DataCollection	Form will only be available for this app		
5		CategoriesTitle	Categories	Title to display on Categories button		
6		QuestionsTitle	Questions	Title to display on Questions button		
7		PrependTitlesWithNumbers	yes	If yes, Categories will be numbered: 1,2,3,.... Sections will be numbered: 1,		
8		EnableTrending	true			
9		EnableTimeTracking	true			
10						
11	**Id**	**Category**	**Category Description**	**Section**	**Question Title**	**Question**
12	0	All Question types	Here we test all different kinds of questions	Text	Q1	Text
13	1			Sliders	Q2	Slider
14	2				Q3	Discreet Slider
15	3			Options	Q4	Single Choice
16	4				Q5	Spider Choice
17	5				Q6	Double Slider
18	6				Q7	Multi Choice
19	7			Section title	Q8	Rank
20	8				Q9	Matrix Single
21	9				Q10	Matrix Multi
22	10				Q11	Table
23	11	Visibility test	Here we test visibility rules	Always visible	Q12	Spider Choic
24	12			Visible on condition	Q13	Discreet Sli
25	13			Nested visibilities	Q14	Single Choi
26	14				Q15	Spider Cho
27	15				Q16	Multi Choi
28	16				Q17	Multi Choi
29	17				Q18	Single Cho
30						
31	**Results - output generated by the form. Currently only spiderDiagram is supported. (Optional)**					
32	**Id**	**Type**	**Title**	**Config**		
33	0	spiderDiagram	SpiderChart Title	0	1	
34						
35	**Reports - available Reports**					
36		**Type**	**Hide unanswered**			
37		excel	no			
38		word	no			
39		pdf	no			
40						
41	**Report items**					
42		**Type**	**Visibility rule**	**Display on reports**	**Value**	
43		heading1		web	JG 042916	
44		heading2		web	Please answer all questions.	
45						

Figure 5 - 2.
Sample Form Template.

1 Form properties

2 Form configuration – question categories, sections and questions (input fields)

3 Results configuration*

4 Report configuration

5 Report items

*Spider Diagram is currently the only results output type supported.

The following sections describe each of these areas in more detail.

Define Form Properties

You can define several form properties as appropriate for each form in the *Form Property* area.

	A	B	C	D	E
1		**Form Property**	**Value**	**Comment**	
2		ParseVersion	3	Tells how to parse form	
3		FormName	JG 042916	Name of form	
4		AvailableForApp	DataCollection	Form will only be available for this app	
5		CategoriesTitle	Categories	Title to display on Categories button	
6		QuestionsTitle	Questions	Title to display on Questions button	
7		PrependTitlesWithNumbers	yes	If yes, Categories will be numbered: 1,2,3,.... Sections will b	
8		EnableTrending	true		
9		EnableTimeTracking	true		

Figure 5 - 3.
Form Property Area.

To create or update form properties, enter or edit the text in the **Value** column. The form properties available are:

Parse Version – Part of the structure of this template. Must always be "3".

FormName – The name of the form as it appears in the web interface. *See figure below.*

AvailableForApp – Not currently in use.

CategoriesTitle – No longer in use.

QuestionsTitle – *No longer in use.*

PrependTitlesWithNumbers – *Not currently in use.*

EnableTrending – If "true", the web interface will maintain trending data for applicable questions.

EnableTimeTracking – If "true", ultimately the app will record the time it takes an operator to complete the collection and send this information to the web interface.

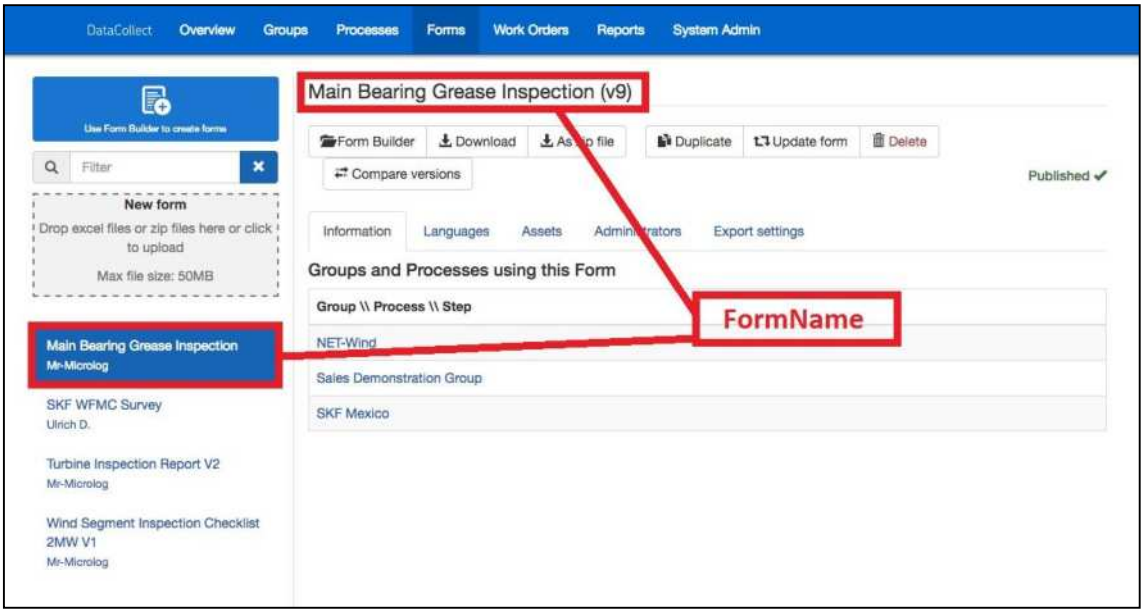


Figure 5 - 4.
FormName Displayed in the Web Interface.

Configure Form Question Categories, Sections and Questions

You must configure forms that incorporate question categories, sections and questions.

- A question **category** is a group of related questions (input fields) and/or sections. You may wish to group questions together under question categories within the work process, for example to define different parts in an inspection (such as categories for pumps, fans and turbines) etc.
  - ➢ Every form must have at least one question category.
- A **section** further groups questions (input fields) together to make the data collection procedure clearer to the app user.
  - ➢ Sections are optional.

- A **question** is the input field prompting the user to collect the right information. There are several question types. You can also extend permissions to users to add media (images, audio and notes) to each question.

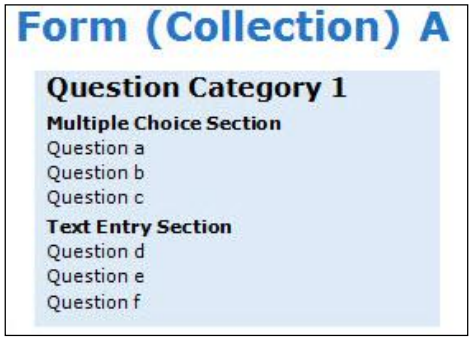


Figure 5 - 5.
Sample Question Structure.

You can define all a form's elements – including question categories, sections and questions – in the *form configuration* area.

	A	B	C	D
13	**Id**	**Category**	**Category Description**	**Section**
14	0	First Round Inspection	Eight questions regarding first round inspection	Overall
15	1			Condition
16	2			
17	3			Observations
18	4			
19	5			
20	6			Inference
21	7			Miscellaneous

Figure 5 - 6.
Form Configuration Area (**Id** through **Section**).

Id – Enter a unique identifier for each row (required if visibility rules or customised reports are to be used). If a form includes **Id** values, the first row's value should be "0", and each subsequent row's value should be one whole number greater than that of the previous row.

Category – Enter each question category's name as it should appear in the web interface and the app. Each new **Category** name entry on this template begins a new question category and includes every row below it until the next row containing a **Category** name entry. Every form must have at least one question category.

Category Description – Enter a full description of each question category to appear in the app and clarify what is expected per question category. Question category descriptions are optional but recommended.

Section – Enter each section's name as it should appear in the web interface and the app. Each new **Section** name entry on this template begins a new section and includes every row below it until the next row containing a **Section** name entry. Although optional, sections can provide additional structure and clarity to a form. When viewed in the app, the section will appear above the questions within that section.

	E	F	G	H
13	**Question Title**	**Question**	**Mediatypes**	**Visibility rule**
14	Q1	Please describe any visible wear to the machine as c	all	
15	Q2	On a scale of 1-10, how would you rate the machine's overall condition?	all	
16	Q3	On a scale of 1-10, how would you rate the main rotor's overall condition?	all	
17	Q4	How much sound does the machine make?	all	
18	Q5	For how long did you observe the machine?	all	
19	Q6	Which of the following did you observe (select all that apply)?	all	
20	Q7	How would you prioritize maintenance requirements for the next three months?	all	
21	Q8	How would you rate the condition of other aspects of the machine?	all	

Figure 5 - 7.
Form Configuration Area (**Question Title** through **Visibility rule**).

Question Title – Enter each question's title as it should appear in the web interface and the app. Question titles are optional.

Question – Enter the question text as it should appear in the web interface and the app.

Images displayed with the question:

All questions can include one or more images. Images must be in .jpg or .png format and no larger than 2 Mb.

Type, for example: **<img src="question1.jpg">** before the question text to include an image with the question.

When you upload the form to the web interface, you must then upload the associated images on the **Forms** view's **Assets** tab.

MediaTypes – Enter "all" to permit the app user to add media (images, audio and notes) with the answer to the corresponding question. Enter "none" to prevent the app user from adding media with the answer to the corresponding question.

Visibility rule – Enter a rule to make the corresponding question conditional (i.e. to include it or skip it based on previous selections).

Syntax:

q[x][y]

where x represents the form **Id** of the question on which this condition relies,

and y represents the **Options** value that must be selected for x in order to display this subsequent, conditional question.

Examples (when question 1's form **Id** equals "0", option A's value equals"0"and option B's value equals "1"...):

To make it a condition that question 2 only appears if the user's answer to question 1 is "Option A", enter the following in the **Visibility rule** column for question 2:

q[0][0]

To make it a condition that question 2 only appears if the user's answer to question 1 is"Option B", enter the following in the **Visibility rule** column for question 2:

q[0][1]

IMPORTANT: Visibility rules require unique form IDs for every row.

	I	J	K	L	M	N
13	**QuestionType**	**Config**	**Options (Value|Label)**			
14	text					
15	slider		0|Bad	5|Fair	10|Good	
16	discreetSlider	0|5|10	0|Bad	5|Fair	10|Good	
17	singleChoice		0|No Sound	1|Minimal Sound	2|Moderate Sound	3|Excessive Sound
18	spiderChoice	0|0	0|Fewer than 30 seconds	1|30-45 seconds	2|45-60 seconds	3|More than 60 seconds
19	multiChoice		0|Excess heat	1|Shaking	2|Abnormal smells	3|Nothing out of the ordinary
20	rank		0|Lubrication	1|Balancing	2|Tuning	3|Replacement of parts
21	matrixSingleChoice	Bad|Fair|Good	Electrical	Mounting mechanisms	Safety equipment	Warning labels

Figure 5 - 8.
Form Configuration Area (**Question Type** through **Options** Column Four of Seven).

Question Type – Enter the type of data collection input field to be provided in the app for the corresponding question.

Config – Enter text/code for managing the additional configuration needs of the corresponding question, if applicable for its type.

Options – Enter text/code to define possible inputs/answers for the corresponding question. You can add multiple columns to support predefined values. **Options** are required for every **Question Type** except "text".

IMPORTANT – For complete information on the Question Type, Config and Options columns, see Question Types, Configuration and Option Examples below.

	R	S
13	**Help text**	**Comment - Ignored when generating form definition.**
14	Select at least one	Increase the date range
15		
16		
17		
18		
19		
20		
21		

Figure 5 - 9.
Form Configuration Area (**Help text** through **Comment**).

Help text – Enter text to be displayed in the app to assist the user as necessary with the corresponding question. Enter an image file name to include an image for display in the app to assist the user as necessary with the corresponding question. Enter a URL to configure the help text to include a hyperlink to an external site.

Images displayed with the help text:

Images must be in .jpg or .png format and no larger than 2 Mb.

Type, for example: **<img src="help.jpg">** before the help text to include an image with the help text.

When you have uploaded the form to the web interface, you must then upload the associated images on the **Forms** view's **Assets** tab.

The app includes an "i" next to any questions with help text. When the operator taps the"i", the help text will be displayed. If a hyperlink is included, the operator can tap it to load the applicable Web page in their device's default browser.

Comment – If necessary, enter comments for display within this Excel-based form template only. The comments will not appear in the web interface or the app.

Question Types, Configuration and Option Examples

Question Type	Appearance/Behaviour in App	Config Column	Option Examples (Value|Label)
calculation	Contact *Apps Support* for information and instructions.		
date	Date roller with current date as default (if the current date falls within the configured date range). **Important:** Make sure to set a wide date range, otherwise users will not be able to select a valid date.	Define permissible range. Example: 2013-01-01|2017-12-31. Add |defaultValue= as necessary. Example: **|defaultValue=2015-05-06** will result in a default date selection of 6 May 2015.	
discreteSlider	Numerical slider.	min value|step count|max value Example: **0|1|10** will result in a slider ranging from 0 to 10 in steps of 1. Add |defaultValue= as necessary. Example: **|defaultValue=1** will result in a default selection of 1.	0|Bad 5|Fair 10|Good
doubleSlider	Numerical slider used to specify an interval between minimum and maximum values.	min value|max value Example: **0|100** will result in a slider ranging from 0 to 100. Add |defaultValue= as necessary. Example: **|defaultValue=10,90** will result in default selections of 10 and 90.	
infoBarGraph	Contact *Apps Support* for information and instructions.		
list	Similar to table question type, but with flexibility in the number of lines available. Contact *Apps Support* for instructions.		
matrixMultiChoice	Single or multiple selection(s) per row from preset options.	Label the columns. Example: col0|col1|col2 Add |defaultValue= as necessary. Example: **|defaultValue=0,1;0,1,2** will result in a default selection of columns 0 and 1 in the first row and columns 0, 1 and 2 in the second row.	Label the rows. Example: row0 row1 row2 row3

Question Type	Appearance/Behaviour in App	Config Column	Option Examples (Value|Label)
matrixSingleChoice	Single selection per row from preset columns.	Label the columns. Example: col0|col1|col2 Add |defaultValue= as necessary. Example: **|defaultValue=1;1;3** will result in a default selection of column 1 in the first row, column 1 in the second row and column 2 in the third row.	Label the rows. Example: row0 row1 row2 row3
multiChoice	Single or multiple selection(s) from preset options.	Add defaultValue= as necessary. Example: **defaultValue=1,2,3** will result in default selections of 1, 2 and 3.	0|Option #1 1|Option #2 2|Option #3 3|Option #4
number	Text entry limited to numeric values.	defaultValue= |lowerLimit= |upperLimit= |lowerThreshold= |upperThreshold= |units Example: defaultValue=99|lowerLimit=0|upperLimit=2000|lowerThreshold=10|upperThreshold=1500|cm will result in a text box that: • has a default value of 99 • will not accept negative values or values over 2000 • will mark values between 10 and 1500 as red text • will be expressed in centimeters	
numeric	*See Numeric Question Type Configuration.*		
rank	List for ranking/prioritisation of the preset options.	Add |defaultValue= as necessary. Example: **|defaultValue=1,2,3** will result in a default order of 1, 2 and then 3.	0|Option #1 1|Option #2 2|Option #3 3|Option #4

Question Type	Appearance/Behaviour in App	Config Column	Option Examples (Value|Label)
signature	Manual signature box and accompanying keyboard text-entry box for user name. Both boxes are required.		
singleChoice	Single selection from preset options.	Add defaultValue= as necessary. Example: **defaultValue=1** will result in a default selection of 1.	0|Option #1 1|Option #2 2|Option #3 3|Option #4
slider	Slider with option labels displayed and option values hidden. The option values can be used to trigger Visibility rules or customised report items.	Add defaultValue= as necessary. Example: **defaultValue=1.0** will result in a default selection of 1.0.	0.0|Bad 0.5|Fair 1.0|Good
spiderChoice	Single selection from preset options. Results accessible in a SpiderChart available in both the app and the web interface reports. SpiderChart sections combine all applicable individual results (i.e. those in the section) as a single result for reporting. SpiderChart subsections are assigned to individual results so that they each have the same weight as a section of combined results.	results id|spider chart section|spider chart subsection The results id is currently always "0" The spider chart section values are "0" for the first section, "1" for the second section, "2" for the third section, etc. Therefore, section configuration examples include **0|0** (questions in the first section) or **0|1** (questions in the second section) etc. Subsection configuration examples include **0|0|0** (first subsection in the first section), **0|0|1** (second subsection in the first section), etc. Add |defaultValue= as necessary. Example: **|defaultValue=1** will result in a default selection of 1.	0|Option #1 1|Option #2 2|Option #3 3|Option #4
table	*See Table Question Type Configuration*.		
table2	*See Table2 Question Type Configuration*.		
tableFixed	Contact *Apps Support* for information and instructions.		

Question Type	Appearance/Behaviour in App	Config Column	Option Examples (Value|Label)
text	Free-form text box.	max characters Example: **50** will result in a text box accommodating 50 characters. Add |defaultValue= as necessary. Example: **|defaultValue=N/A** will result in default text "N/A".	
vibration	Facilitates collection of vibration measurement data.	Contact *Apps Support* for instructions.	

Numeric Question Type Configuration

Numeric question types enable entry of numeric values that are subject to window and threshold rules. These rules determine whether the value entered should result in a "danger" or "warning" alarm condition for the question.

Potential **Config** column elements for numeric question types include the following:

$	*Numeric functionality indicator*
|defaultValue=x	*x represents the default value to appear for the question*
|inWindow=x,y	*x and y represent the lower and upper values of the window. If the numeric entry is within the window, a "danger" alarm condition exists.*
|outWindow=x,y	*x and y represent the lower and upper values of the window. If the numeric entry is outside the window, a "danger" alarm condition exists.*
|windowLowerThreshold=x	*x represents the threshold range relative to and below the window's lower value. If the numeric entry is within this range, a "warning" alarm condition exists.* *If no window logic is used, this value represents the low number in the "warning" alarm condition range.*
|windowUpperThreshold=x	*x represents the threshold range relative to and above the window's upper value. If the numeric entry is within this range, a "warning" alarm condition exists.* *If no window logic is used, this value represents the high number in the "warning" alarm condition range.*
|lowerLimit=x	*x represents the lowest numerical value entry allowed*
|upperLimit=x	*x represents the highest numerical value entry allowed*
trend=true	*trend is enabled for numeric question types.*

Config column examples:

Example	**"Danger" alarm value range(s)**	**"Warning" alarm value range(s)**
$|inWindow=40,60	>=40 and <=60	N/A
$|inWindow=40,60|windowLowerThreshold=10	>=40 and <=60	>=30 and <40
$|inWindow=40,60|windowLowerThreshold=10 |windowUpperThreshold=20	>=40 and <=60	>=30 and <40 OR >60 and <=80
$|outWindow=40,60|windowUpperThreshold=5	<40 OR >60	>55 and <=60
$|lowerLimit=10|upperLimit=90|lowerThreshold=20|upperThreshold=80	>=20 and <=80	N/A

Gauge Numeric Question Type 58862343

Gauge numeric question types enable the selection of numeric values via graphical user interfaces representing various types of gauges. These question types are subject to the same window and threshold rules as all numeric question types, resulting in “danger” or “warning” alarm conditions as appropriate.

Additional **Config** column elements for gauge numeric question types include the following:

units	*Units to be associated with the numeric value; configured at the beginning of the Config string*
|visualization=x	*x represents the type of gauge to display in the graphical user interface*

Circular Gauge Numeric Question Type

The following is an example of a circular gauge configuration and its graphical user interface representation:

M/S|visualization=circularGauge|lowerLimit=1|upperLimit=20

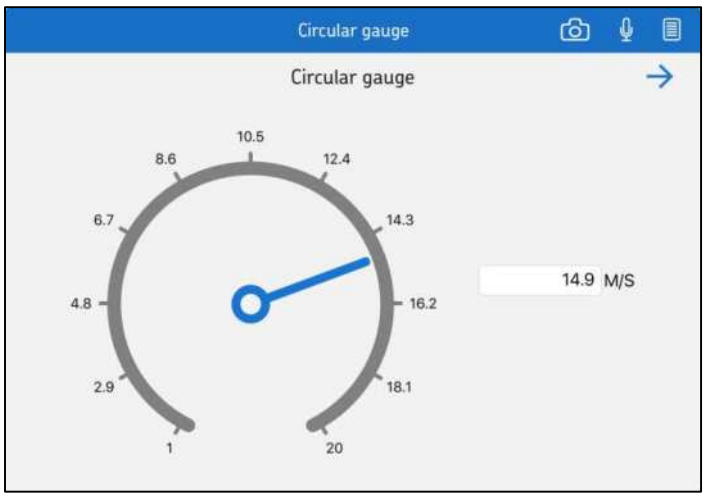


Figure 5 - 10.
Circular Gauge Example.

Level Gauge Numeric Question Type

The following is an example of a level gauge configuration and its graphical user interface representation:

Pascal|visualization=levelGauge|lowerLimit=1|upperLimit=5|lowerThreshold=2|upperThreshold=5

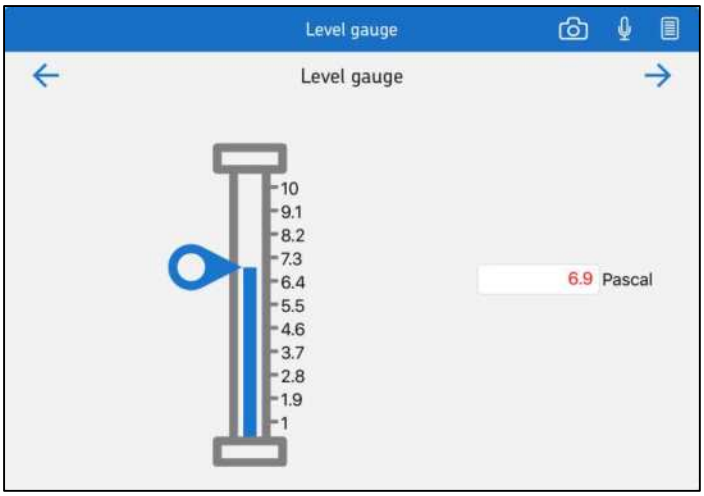


Figure 5 - 11.
Level Gauge Example (with Value Inside Warning Alarm Condition Range).

Thermometer Numeric Question Type

The following is an example of a thermometer configuration and its graphical user interface representation:

Celsius|visualization=thermometer|lowerLimit=0|upperLimit=1000

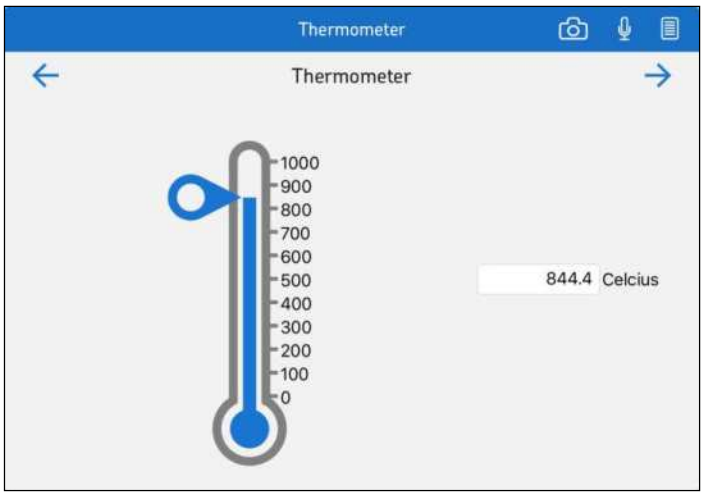


Figure 5 - 12.
Thermometer Example.

Standard Gauge Numeric Question Type

The following is an example of a standard gauge configuration with defined window and threshold rules and its graphical user interface representation:

RPM|inWindow=30,50|windowLowerThreshold=10|visualization=standardGauge|lowerLimit=1|upperLimit=50

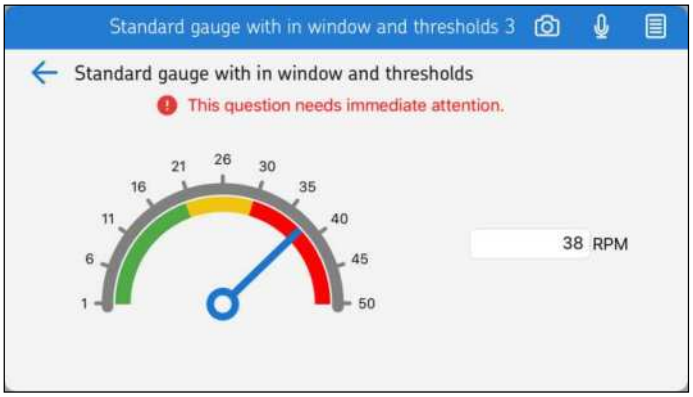


Figure 5 - 13.
Standard Gauge Example (with Value Inside Danger Alarm Condition Range).

Vibration Question Type Configuration

Vibration question types enable collection of machine vibration measurements from compatible wireless sensors placed at specific machine POINTs. As with Numeric question types, these measurements are subject to window and threshold rules which determine whether the data collected should result in a "danger" or "warning" alarm condition for a given machine or individual POINT.

IMPORTANT - To set "danger" and "warning" alarm thresholds for an entire machine, configure Measurement Settings as well as velocity alarm, enveloped acceleration alarm and temperature alarm levels via the Config column. To set "danger" and "warning" alarm thresholds separately for individual POINTs, configure these same items via the Options columns (each Options column corresponds to an individual POINT).

Config column elements for vibration question types include the following:

Config Column	Definition	Option Examples (Value|Label)
machineType	The default is *machineType*. DO NOT modify.	*machineType:machineType*
imageUrl	Enter the filename of the image to be uploaded with the form for association with this question. During data collection, POINTs will be superimposed over this image. Acceptable file types are .png or .jpg.	*imageUrl:frontview.png*
imageX	Enter the number of pixels to offset the image horizontally from the left edge of the measurement question screen in the DataCollect app.	*imageX:20*
imageY	Enter the number of pixels to offset the image vertically from the top edge of the measurement question screen in the DataCollect app.	*imageY:180*

Config Column	Definition	Option Examples (Value|Label)
barCodeEnabled	If *true*, on working with this question, an operator can use the code scan feature during data collection as a means of obtaining machine information (ID, type, bore size, rpm, etc.) with a simple scan of an EAN barcode or QR code. For this feature to work properly, *order* and *filter* configurations must also exist in the **Config** column (see the following two rows of this table). If *false*, the code scan feature is not available to the operator for this question. In this case, *order* and *filter* MUST NOT exist in the **Config** column (see the following two rows of this table).	*barCodeEnabled:true*
order	This code specifies the order in which the data contained within the EAN/QR code is read and populated into the machine's Measurement Settings for this question in the DataCollect app. The order is FIXED, so DO NOT modify.	*order:machineId,boreSize,rpm*
filter	The default is *test*. DO NOT modify.	*filter:test*
trend	If *true*, trending will be enabled for this question. For this configuration to be valid, *EnableTrending* in cell B8 must also set to *true*. NOTE: With trend set to *true*, velocity, temperature and enveloped acceleration thresholds MUST be preconfigured If *false*, trending will not be enabled for this question.	*trend:true*

Config Column	Definition	Option Examples (Value|Label)
diagnosticEnable	If *true*, the Diagnostic Request feature will be visible and active for this question during data collection. If *false*, the Diagnostic Request feature will NOT be visible or active for this question during data collection. NOTE: The *trend* and *diagnosticEnable* configurations cannot be active (set to *true*) simultaneously.	*diagnosticEnable:false*
editable	If *true*, an operator will be able to set the machine's Measurement Settings for this question in the DataCollect app. If *false*, an operator will NOT be able to set the machine's Measurement Settings for this question in the DataCollect app.	*editable:false*
machineId	Enter the machine name to appear in the machine's Measurement Settings for this question in the DataCollect app.	*machineId:S/N1234*
bearingBoreSize	Enter the bearing bore size to appear in the machine's Measurement Settings for this question in the DataCollect app.	*bearingBoreSize:50*
rotationalSpeed	Enter the machine running speed to appear in the machine's Measurement Settings for this question in the DataCollect app.	*rotationalSpeed:1800*
velocityAlarmLabels	Configure the velocity low warning, high warning and alert thresholds for the machine. NOTE: You must specify all three levels.	*velocityAlarmLabels:2.3|4.5|7.1*
envelopedAccelerationThresholds	Configure the gE Band 3 alert and danger thresholds for the machine. NOTE: With these thresholds configured, the calculation of the alert and danger I.A.W gE band 3 algorithm is ignored.	*envelopedAccelerationThresholds:2.278|6.80*
temperatureThresholds	Configure the temperature low warning, high warning and alert thresholds for the machine. NOTE: You must specify all three levels.	*temperatureThresholds:24.75|48.5|75.55*

Options column elements for vibration question types include the following:

Options Column	Definition	Option Examples (Value|Label)
bearingBoreSize	Enter the bearing bore size to appear in the individual POINT's Measurement Settings for this question in the DataCollect app.	*bearingBoreSize:50*
RotationalSpeed	Enter the machine running speed to appear in the individual POINT's Measurement Settings for this question in the DataCollect app.	*rotationalSpeed:1800*
velocityAlarmLabels	Configure the velocity low warning, high warning and alert thresholds for the individual POINT. NOTE: You must specify all three levels.	*velocityAlarmLabels:2.3|4.5|7.1*
envelopedAccelerationThresholds	Configure the gE Band 3 alert and danger thresholds for the individual POINT. NOTE: With these thresholds configured, the calculation of the and alert and danger I.A.W gE band 3 algorithm is ignored.	*envelopedAccelerationThresholds:2.278|6.80*
temperatureThresholds	Configure the temperature low warning, high warning and alert thresholds for the individual POINT. NOTE: You must specify all three levels.	*temperatureThresholds:24.75|48.5|75.55*

Options Column	Definition	Option Examples (Value|Label)
[a:b]|0|[c:d]|t	*a* represents the number of pixels to offset the individual measurement POINT's dot horizontally from the left edge of the measurement question screen. *b* represents the number of pixels to offset the individual measurement POINT's dot vertically from the top edge of the measurement question screen. *0* is the default value for text orientation. Leave the default value as it is. *c* represents the number of pixels to offset the individual measurement POINT's label horizontally from the left edge of the measurement question screen. *d* represents the number of pixels to offset the individual measurement POINT's label vertically from the top edge of the measurement question screen. *t* represents the text to be appear in the individual measurement POINT's label (maximum of three characters). You must include the code *position* before these coordinates if you intend to configure POINT-level alarms.	*position:[10:15]|0|[20:25]|1V*

Table Question Type Configuration

Create *table* question types to enable entry or selection of data within a basic table in the app.

- You must configure a table within a single template row (as with other question types). For each table column that you intend to create, you must configure a separate template column within the **Options** cells area.
- You can configure most standard question types (i.e. those described above) for use in the table columns. Some examples are presented below.

Options (Value|Label)			
singleChoice[Poor|Fair|Good|Excellent]|Condition	multiChoice[Mon|Wed|Fri]|Operation Days	text|Temp	text|Operator

Figure 5 - 14.
Table Question Type *Options* Area.

Syntax for a singleChoice column (all cells in the column will allow for single selection):

singleChoice[x|x|x|x]|y

where x (unlimited) represents an option to be included for selection,

and y represents the label to appear at the top of the column.

Syntax for a multiChoice column (all cells in the column will allow for multiple selection):

multiChoice[x|x|x|x]|y

where x (unlimited) represents an option to be included for selection,

and y represents the label to appear at the top of the column.

Syntax for a text column (all cells in the column will allow for text entry):

text|y

where y represents the label to appear at the top of the column.

To create a table question type:

- Enter a unique identifier for the table in the **Id** column.
  - Typically, each row's value should be one whole number greater than that of the previous row.
- Enter a **Category** if you intend the table to have its own question category.
- Enter a **Category Description** as desired/necessary.
- Enter a **Section** if you intend the table to have its own section.
- Enter a **Question Title** (the table's title) as desired/necessary.
- Enter a **Question**. This value should essentially be a question or description to which all entries/selections made in the table will apply.

- Enter “all" in the **Mediatypes** column to permit the app user to attach media (images, audio and notes) to the table or “none” to prevent the app user from attaching media to the table.
- Enter a **Visibility rule** as desired/necessary.
- Enter “table” in the **QuestionType** column.
- Configure default values in the **Config** column. Contact Apps Support for more details.
- Enter the question types that you intend for each table column in the **Options** columns. Follow the syntax described above.
    - ➢ You can add multiple columns to support table column setups.

Table2 Question Type Configuration

Create *table2* question types to enable entry or selection of data within an advanced table in the app.

- ➢ During configuration, you can separately define the behaviour of each individual table2 cell, should you wish to do so.
- ➢ You must use multiple template rows to configure a single table2.
- ➢ You can configure most standard question types (i.e. those described above) for use in the individual table2 cells. Some examples are presented below.

	Id	Category	Category Description	Section	Question Title	Question	Mediatypes	Visibility rule	QuestionType	Config	Options (Value|Label)			
10														
11	grid	Inventory			Q1	Machine Check			table2		Machine Operator	Machine Condition	<img src="guage.jpg">Temperature	
12	grid.row0column0					Machine 1			text	parentId=grid|question=Machine Operator				
13	grid.row0column1								slider	parentId=grid|question=Machine Condition	0|Poor	5|Fair	10|Good	15|Excellent
14	grid.row0column2								text	parentId=grid|question=Temperature				
15	grid.row1column0					Machine 2			text	parentId=grid|question=Machine Operator				
16	grid.row1column1								slider	parentId=grid|question=Machine Condition	0|Poor	5|Fair	10|Good	15|Excellent
17	grid.row1column2								text	parentId=grid|question=Temperature				
18	grid.row2column0					Machine 3			text	parentId=grid|question=Machine Operator				
19	grid.row2column1								slider	parentId=grid|question=Machine Condition	0|Poor	5|Fair	10|Good	15|Excellent
20	grid.row2column2								text	parentId=grid|question=Temperature				
21	grid.row3column0					Overall Condition of Machine Room			singleChoice	parentId=grid|question=Room Condition	0|Poor	5|Fair	10|Good	15|Excellent
22	grid.row3column1								text	parentId=grid|question=Note 1				
23	grid.row3column2								text	parentId=grid|question=Note 2				

Figure 5 - 15.
Table2 Question Type.

In the first (grey) row of the table2 configuration area:

Id	Category	Category Description	Section	Question Title	Question	Mediatypes	Visibility rule	QuestionType
grid	Inventory			Q1	Machine Check			table2

Id – Enter a unique identifier for the entire table. This identifier becomes the “parent ID.”

Example: grid

Category, **Category Description**, **Section**, **Question Title** and **Question** – All function the same as throughout the rest of the template, but any values entered into this first row apply to all rows associated with the same parent ID.

MediaTypes – Leave empty/blank as it is not used within table2.

Visibilityrule – Leave empty/blank as visibility is not defined at the top level within table2.

QuestionType – Must always contain "table2".

Config	Options (Value|Label)			
	Machine Operator	Machine Condition	<img src="guage.jpg">Temperature	

Config – Leave empty/blank. You configure this column in the remaining rows of the table2 configuration area.

Options – For each table2 column that you intend to create, enter a name in a separate template column within the **Options** cells area to define the table2 column header.

- If you wish to include an image at the top of any column header, enter the image name here (see figure above) as follows:

  <img src="n">c

  where n represents the .jpg file name

  and c represents the intended column header text

- You can add multiple columns to support table2 column setups.

In the remaining rows of the table2 configuration area:

	Id	Category	Category Description	Section	Question Title	Question	Mediatypes	Visibility rule	QuestionType
10									
12	grid.row0column0					Machine 1			text
13	grid.row0column1								slider
14	grid.row0column2								text
15	grid.row1column0					Machine 2			text
16	grid.row1column1								slider
17	grid.row1column2								text
18	grid.row2column0					Machine 3			text
19	grid.row2column1								slider
20	grid.row2column2								text
21	grid.row3column0					Overall Condition of Machine Room			singleChoice
22	grid.row3column1								text
23	grid.row3column2								text

Id – In each row, enter a unique identifier that is descriptive of the individual table2 cell and includes the parent ID.

Examples: grid.row0column0, grid.row0column1, etc.

Category, **Category Description**, **Section** and **Question Title** – Leave all empty/blank, as these attributes do not apply to individual table2 cells.

Question – In the row corresponding to the first cell in each row of the intended table2, enter a label for the intended table2 row.

MediaTypes – Leave empty/blank as it is not used within table2.

Visibilityrule – In each row, enter "false" (all lower case) if you wish to "lock-down" the intended table2 cell (i.e. prevent entry or selection within the table2 cell).

- To ensure the entry "false" remains all lower case, type a single apostrophe before it (*'false*).

QuestionType – In each row, enter the question type to be used within the intended table2 cell.

Config	Options (Value|Label)			
parentId=grid|question=Machine Operator				
parentId=grid|question=Machine Condition	0|Poor	5|Fair	10|Good	15|Excellent
parentId=grid|question=Temperature				
parentId=grid|question=Machine Operator				
parentId=grid|question=Machine Condition	0|Poor	5|Fair	10|Good	15|Excellent
parentId=grid|question=Temperature				
parentId=grid|question=Machine Operator				
parentId=grid|question=Machine Condition	0|Poor	5|Fair	10|Good	15|Excellent
parentId=grid|question=Temperature				
parentId=grid|question=Room Condition	0|Poor	5|Fair	10|Good	15|Excellent
parentId=grid|question=Note 1				
parentId=grid|question=Note 2				

Config – Enter the parent ID and define the title that should appear upon clicking in the table cell, using the following syntax:

parentId=p|question=q

where p represents the referenced parentID

and q represents the question title

Example: parentId=grid|question=Machine Operator

- If you intend the table cell to include a pre-populated default value, enter that value using the following syntax:

parentId=p|question=q|defaultValue=d

where d represents the default value to appear

Example: parentId=grid|question=Machine Operator|defaultValue=10

Options – For question types other than text (singleChoice, slider, etc.), enter options (values and labels) as you would elsewhere in the template. Enter as many options as you require.

Examples: 0|Poor, 5|Fair, etc. (for singleChoice)

- ➢ The values that you enter in these cells do not correlate with the column header labels entered in the first (grey) row of the *table2* configuration.
- ➢ You can add multiple columns to support table2 options.

To create a table2 question type:

In the first row:

- Enter a unique identifier for the entire table in the **Id** column.
  - ➢ This identifier becomes the "parent ID".
- Enter a **Category** if you intend the table to have its own question category.
- Enter a **Category Description** as desired/necessary.
- Enter a **Section** if you intend the table to have its own section.
- Enter a **Question Title** (the table's title) as desired/necessary.
- Enter a **Question**. This value should essentially be a question or description to which all entries/selections made in the table will apply.
- Leave the **Mediatypes** column empty/blank as it is not used within table2.
- Leave the **Visibility rule** column empty/blank as visibility is not defined at the top level within table2.
- Enter "table2" in the **QuestionType** column.
- Leave the **Config** column empty/blank.
- Enter names in separate columns within the **Options** cells area to define the table2 column headers.
  - ➢ If you wish to include an image at the top of any column header, enter the image name here. Follow the syntax described above (page 3-**Error! Bookmark not defined.**).
  - ➢ You can add multiple columns to support table column setups.

In the remaining rows:

- Enter a unique identifier for the individual cell in the **Id** column. This identifier must include the parent ID at the beginning followed by a period (for example: grid.row0column0).
- Leave **Category**, **Category Description**, **Section** and **Question Title** empty/blank, as these attributes do not apply to individual table2 cells.
- Enter a **Question** in the row corresponding to the first cell in each row of the intended table2 to become a label for each intended table2 row
- Leave the **Mediatypes** column empty/blank as it is not used within table2.
- In each **Visibility rule** row, enter "false" (all lower case) if you wish to "lock-down" the intended table2 cell (i.e. prevent entry or selection within the table2 cell).
- In the **Question Type** column, enter the question type to be used within the intended table2 cell.
- In the **Config** column, enter the parent ID and define the title to appear upon clicking in the table cell. Follow the syntax described above.
- For question types other than text (singleChoice, slider, etc.), enter each option (value and label) in an individual **Options** cell in the same row.
    - The values that you enter in these cells do not correlate with the column header labels entered in the first (grey) row of the *table2* configuration.
    - You can add multiple columns to support table column setups.

EAN/QR Code Scan Feature Configuration

An operator can use the code scan feature during data collection as a means of obtaining machine information (ID, type, bore size, rpm, etc.) with a simple scan of an EAN barcode or QR code. To enable this feature, you must configure a form template to include instructions for reading specific EAN barcodes and/or QR codes.

You can enable the scan feature to be used with individual text or vibration questions, or an entire section of text questions.

Enable the EAN code scanner for use with a text question type

A properly configured text question will enable a DataCollect operator to respond by scanning the appropriate EAN code. This configuration requires a "barCodeEnabled" parameter entered into that question's Config column:

barCodeEnabled

When an EAN code is later scanned for this question, the app uses that code's data string as a response to the question.

Enable the QR code scanner for use with a text question type

A properly configured text question will enable a DataCollect operator to respond by scanning the appropriate QR code. This configuration requires "barCodeEnabled",

"QRValueIndex" and "filter" parameters entered into that question's **Config** column, for example:

barCodeEnabled|QRValueIndex=2|filter=Plant1

- The QRValueIndex number entered indicates the value, from among a set of values in the QR code's data string, to use for the response.
- The filter entry indicates the prefix that must be present in the QR code's data string.

Considering the above example, let us say a QR code later scanned for this question contains the data string: "DC-Plant1:0012;Conveyor;40;120."

Having identified the string's prefix "DC-Plant1" as matching the configured filter, the app decides to utilise the data from this code.

- If the prefix had not matched the configured filter, the app would not have utilised the data from this code.

The configured QRValueIndex is "2", so the app uses the second value in the data string, "Conveyor", as the response to the question.

- If no QRValueIndex had been defined, the app would have used all values in the data string (excluding the prefix) as a response to the question.

Enable the QR code scanner for use with a vibration question type

A properly configured vibration question will enable a DataCollect operator to respond by scanning the appropriate QR code. This configuration requires "barCodeEnabled", "order" and "filter" parameters entered into that question's **Config** column, for example:

barCodeEnabled:true
order:machineId,boreSize,rpm
filter:Plant1

- The machineId, boreSize, rpm (or any other defined entries) indicate the values, from among a set of values in the QR code's data string, to use for the response. The order in which these entries appear represents the order in which the values are to be used in the response.
- The filter entry indicates the prefix that must be present in the QR code's data string.

Considering the above example, let us say a QR code later scanned for this question contains the data string: "DC-Plant1:0012; 40;120;" where "0012" is the machine ID, "40" is the bearing bore size, and "120" is the roller speed in RPM.

Having identified the string's prefix "DC-Plant1" as matching the configured filter, the app decides to utilise the data from this code.

- If the prefix had not matched the configured filter, the app would not have utilised the data from this code.

The first order entry, "machineId", represents the machine ID value in the data string. That value, in this case "0012", is used as the machineId response to the question.

The second order entry, “boreSize”, represents the bearing bore size value in the data string. That value, in this case “40”, is used as the boreSize response to the question.

The third order entry, “rpm”, represents the roller speed value in the data string. That value, in this case “120”, is used as the boreSize response to the question.

- Each value within the QR code’s data string was assigned a category (such as machineId, boreSize or rpm) at the time the QR code itself was generated. For more information on generating QR codes, please contact Technical Support.

Enable the QR code scanner for use at section level

A properly configured section of text questions will enable a DataCollect operator to respond by scanning the appropriate QR code. This configuration requires “barCodeEnabled”, “filter” and “order” parameters entered into that question’s **Config** column, for example:

barCodeEnabled=true
filter=Plant1
order=[‘q1’,’q4’,’q2’]

Considering the above example, let us say a QR code later scanned for this section contains the data string: “DC-Plant1:0012;Conveyor;40;120.”

Having identified the string’s prefix “DC-Plant1” as matching the configured filter, the app decides to utilise the data from this code.

- If the prefix had not matched the configured filter, the app would not have utilised the data from this code.

The first order entry is “q1”, so the app uses the first value in the data string, “0012”, as the response to the first question in the section.

The second order entry is “q4”, so the app uses the fourth value in the data string, “120”, as the response to the second question in the section.

The third order entry is “q2”, so the app uses the second value in the data string, “Conveyor”, as the response to the third question in the section.

Configure Results Display

DataCollect can create a SpiderChart (SpiderDiagram) graphical representation of any data collected with the "SpiderChoice" question type. The SpiderChart is viewable from within the app (see app user manual) as well as in the Word® report generated from the web interface. The Excel® report, also generated from the web interface, will have a separate tab displaying the SpiderChart sections and values, and you can quickly create graphical representations using Excel's built-in capabilities for creating SpiderCharts.

In the Results Configuration area, you can configure the SpiderChart graphical representation for any "SpiderChoice" **QuestionType** question(s).

IMPORTANT: If you do not need the SpiderChart, remove all data in the Results Configuration area (BUT KEEP THE AREA'S HEADING ROWS).

	A	B	C	D	E	F	G	H	I	J
23	**Results - output generated by the form. Currently only spiderDiagram is supported. (Optional)**									
24	**Id**	**Type**	**Title**	**Config**					**Comment**	
25	0	spiderDiagram	SpiderChart Title	0	1	4	min		Config: Min, Step, Max, [ignore / min / av	

Figure 5 - 16.
Results Configuration Area.

Columns in this area are as follows:

Id – Will always be "0" as only one SpiderChart is supported.

Type – Will always be "SpiderDiagram".

Title – Enter a name for the SpiderChart to appear in the app and in the reports.

Config – Enter values into the five configuration columns as appropriate:

First column – The SpiderChart's lowest value, most likely "0".

Second column – The step count interval, most likely "1".

Third column – The SpiderChart's maximum value.

Fourth column – How unanswered questions are treated:

"ignore" – do not include missing answers

"min" – set missing answers to the minimum value

"max" – set missing answers to the maximum value

"avg" – set missing answers to an average value

Fifth column – The naming of sections as they will appear in the SpiderChart sections and separated by vertical bars, for example: "Section One Name|Section Two Name|Section Three Name"

Comment – If necessary, enter comments for display within this Excel-based form template only. The comments will not appear in the web interface or the app.

Select Report Formats

In the Report Configuration area, you can set the report file formats that can be available within the app.

	A	B	C
27	Reports - available Reports		
28		Type	Hide unanswered
29		excel	no
30		word	no

Figure 5 - 17.
Report Configuration Area.

Type – "word ", "excel" and "pdf" appear by default. To remove a report type, delete the row with the reporting format and configuration.

- You can also add "powerpoint" as a report type option.

Hide unanswered – Enter "yes" to hide unanswered questions' results from the report. Enter "no" to include unanswered questions' results in the report.

Customise Report Items

In the Report Items area, you can customise reporting to create polished reports that can be viewed directly within the app or downloaded via the web interface.

- If you do customise reporting, DataCollect will only include the types of report items configured in this section. If nothing is configured in this section, everything from the form will be shown as defined in the Report Configuration Area.

	A	B	C	D	E
33	Report items				
34		Type	Visibility rule	Display on reports	Value
35		heading1		word	Inspection Test Data - Web Report
36		heading2		word	Please describe any visible wear to the machine as compared to this image.
37		textParagraph		word	{q[0].answer}.
38		mediaPhotos		word	q[0]
39		mediaNotes		word	q[0]
40		heading2		word	On a scale of 1-10, how would you rate the machine's overall condition?
41		textParagraph		word	{q[1].answer}.
42		mediaPhotos		word	q[1]
43		mediaNotes		word	q[1]
44		heading2		word	On a scale of 1-10, how would you rate the main rotor's overall condition?
45		textParagraph		word	{q[2].answer}.
46		mediaPhotos		word	q[2]
47		mediaNotes		word	q[2]

Figure 5 - 18.
Report Items Area.

Type – Enter the paragraph styles to apply to specific information (as defined within the same row in the **Value** column) in the report:

heading1

heading2

heading3

textParagraph

mediaPhotos

mediaNotes

Visibility rule – Enter a rule to set whether results should be displayed based on defined criteria.

Examples:

q[1] >0.5 will include text (set in the **Value** column) in the report if the **Id** "1" question's value is greater than "0.5"

q[2][1] will include text (set in the **Value** column) in the report if the **Id** "2" question's second predefined option (option id "1") has been selected

- If the text should always be included, leave the **Visibility rule** blank.

Display on reports – Enter the report destination to which the row's **Value** should be sent: "word" or "excel".

Examples:

To include the **Value** in the Word report, enter "word". To include the **Value** in both the Word and Excel reports, enter "word, excel".

Value – Enter text/code to configure what data and predefined text should appear in the report.

To include predefined text, enter the text.

To include response data, enter code "{q[0].answer}" (where the number in the brackets represents the question **Id**).

You can also combine the two, for example, enter "{q[0].answer} has responded favorably to this section" (where question **Id** 0 is the customer name).

If the **Type** selection is "textParagraph", "mediaPhotos" or "mediaNotes", the **Value** must include the question **Id**. Enter "q[0]" (where the number in the brackets represents the question **Id**).

Appendix A
SKF @ptitude Analyst ROUTEs and DataCollect

SKF @ptitude Analyst ROUTEs and DataCollect Overview

Your company can also use DataCollect to complete @ptitude Analyst ROUTE data collection. First, as an administrator you must work within @ptitude Analyst to set up and assign a ROUTE to a DataCollect operator. The ROUTE then becomes available to the operator via the DataCollect app. Once the operator completes the ROUTE and uploads collected data, you may review collected ROUTE data in @ptitude Analyst.

Assign a ROUTE to a DataCollect Operator

To assign a ROUTE to a DataCollect operator via @ptitude Analyst:

- Create a new ROUTE or open an existing ROUTE. For more details on this process, see your @ptitude Analyst user manual.

IMPORTANT! – In order to successfully use an @ptitude Analyst ROUTE within the DataCollect app, the ROUTE must consist of FOUR and ONLY FOUR levels (the ROUTE, Set, Machine and POINT levels in @ptitude Analyst).

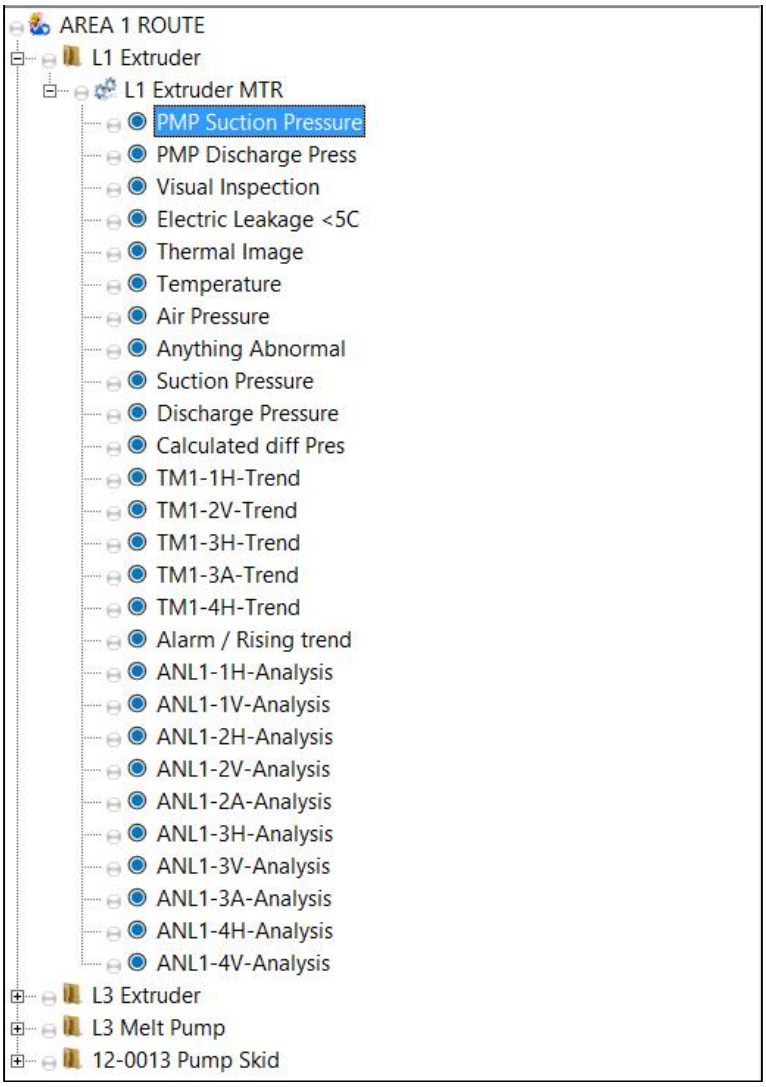


Figure A - 1.
The Four Basic Levels of a ROUTE in @ptitude Analyst.

- Assign the ROUTE via @ptitude Analyst's **Microlog Inspector Settings > Profile Manager** feature (see your @ptitude Analyst user manual for more details on how to use this feature):

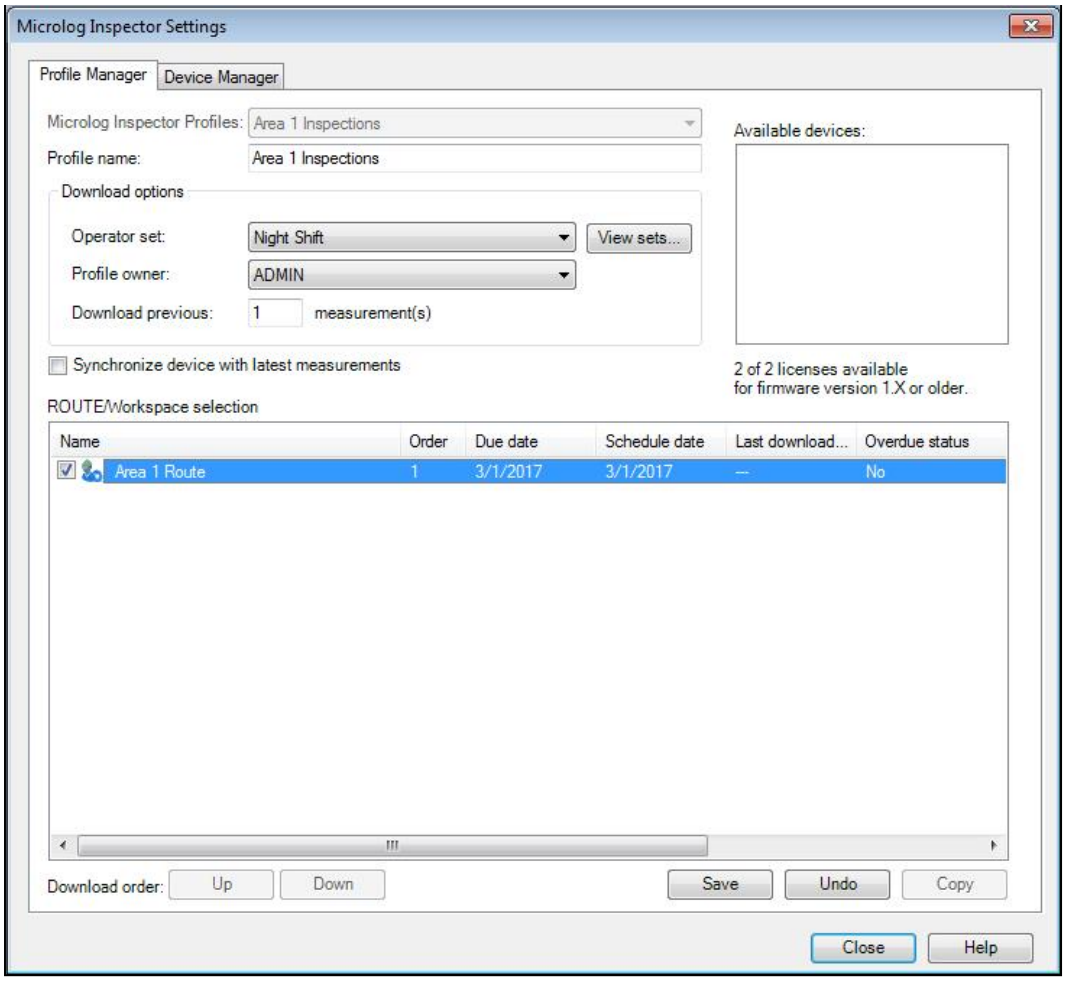


Figure A - 2.
Microlog Inspector Settings > Profile Manager Tab.

a. Select the appropriate profile from the **Microlog Inspector Profiles** drop-down list box.

b. In the **Download options** area, select the appropriate **Operator set** and, if necessary, click **View sets...** to make changes to the operators included in the set.

c. Select the ROUTE that you wish to assign to the profile and operator set.

d. Save the assignments. The ROUTE will be sent to the operator(s) in DataCollect.

Review a Completed ROUTE's Collection Data in @ptitude Analyst

- Select **ROUTE** from the **View** menu. The **ROUTE** table will appear.

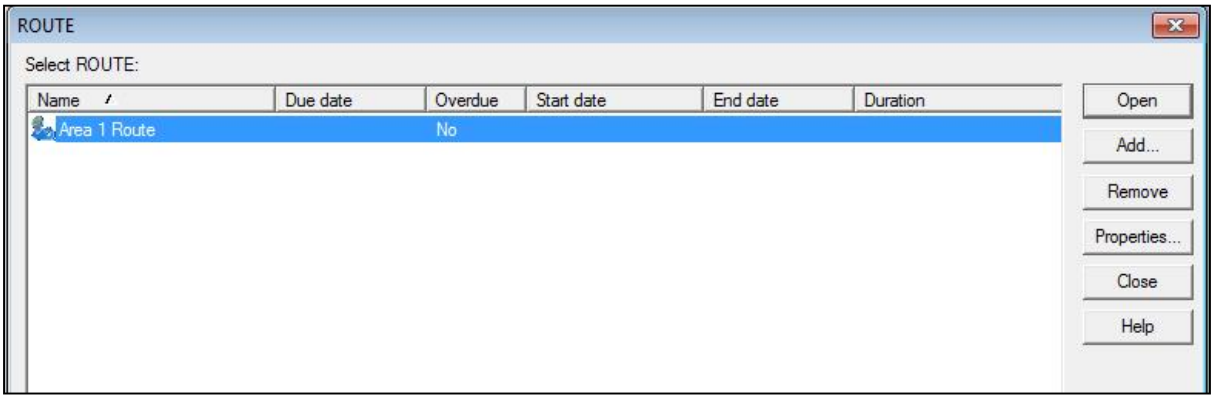


Figure A - 3.
ROUTE in @ptitude Analyst ROUTE table.

- Select and open the appropriate ROUTE from the ROUTE table. The ROUTE will load in its own window.

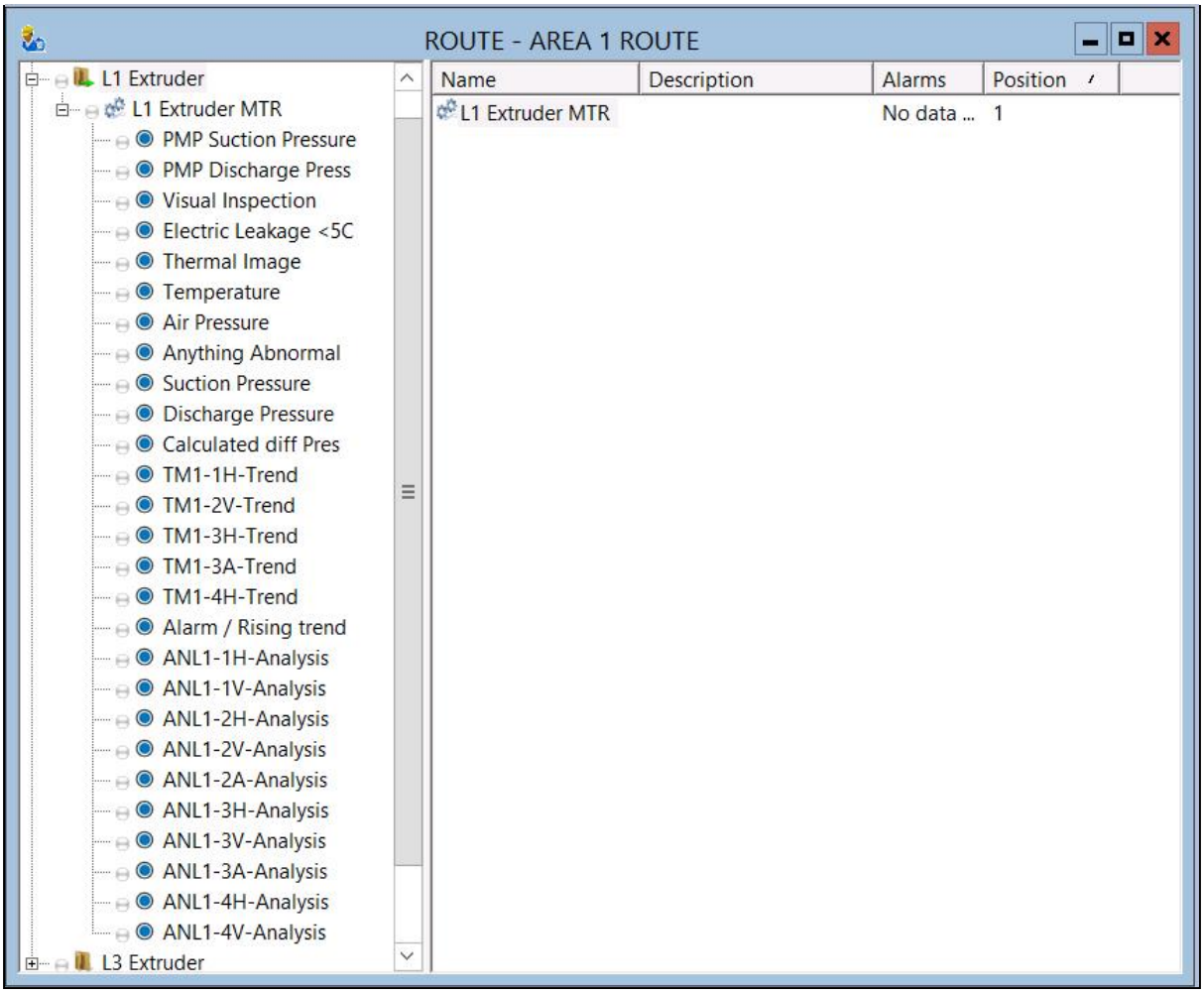


Figure A - 4.
ROUTE with Collected Data, as Evidenced by Alarm Status Indicators.

- Note that alarm statuses are indicated in the ROUTE's hierarchical levels.

To view data collected for a ROUTE's operational questions:

- Click on a measurement POINT representing an operational question. The data collected for that question will appear in the workspace to the right, with individual "measurements" for each time this question has been completed as part of a ROUTE.
- Right-click on a measurement and select **Properties...** from the resulting context menu. The **Measurement Properties** window will appear.

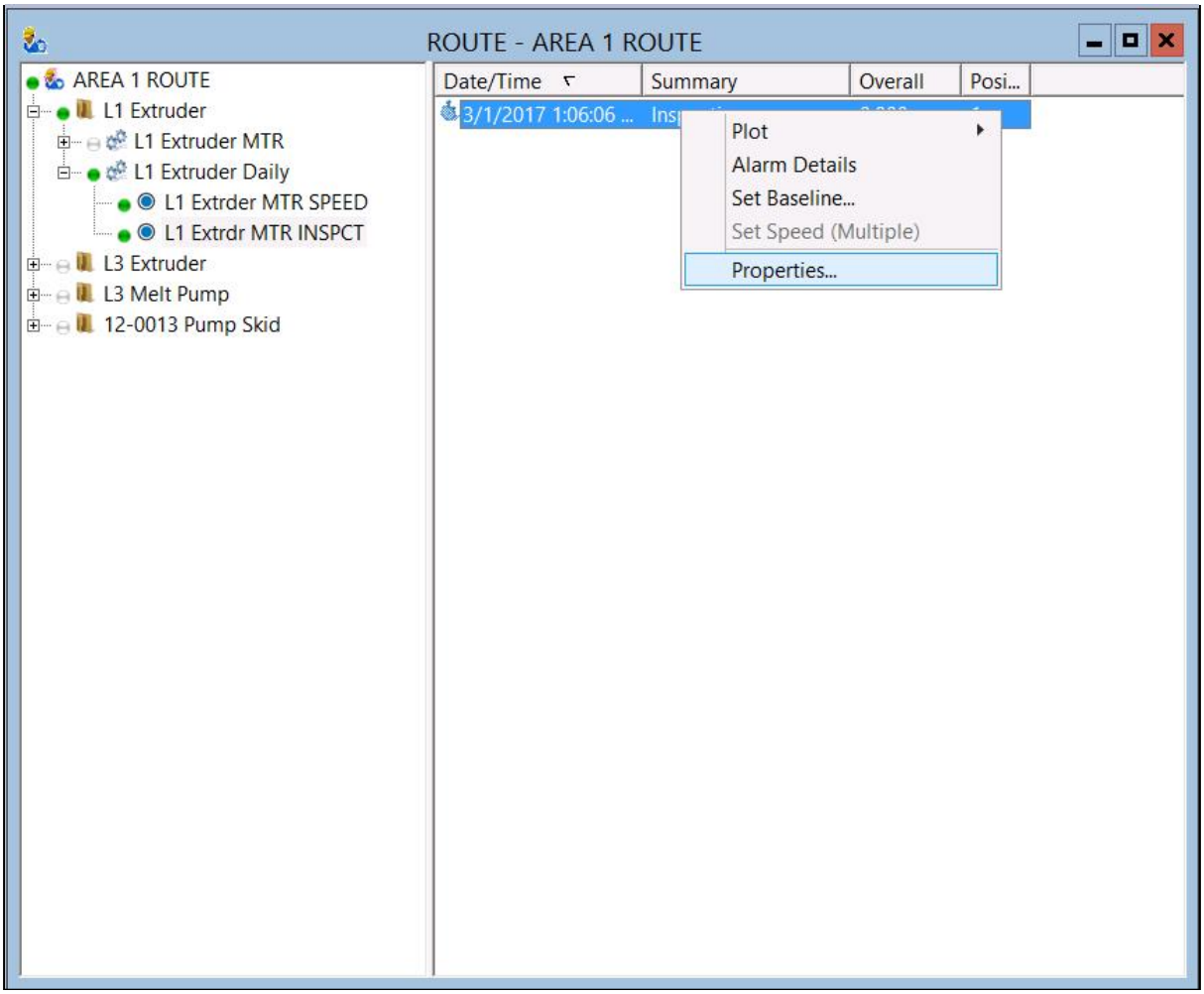


Figure A - 5.
Selecting Properties... from the Operational Question's Latest "Measurement."

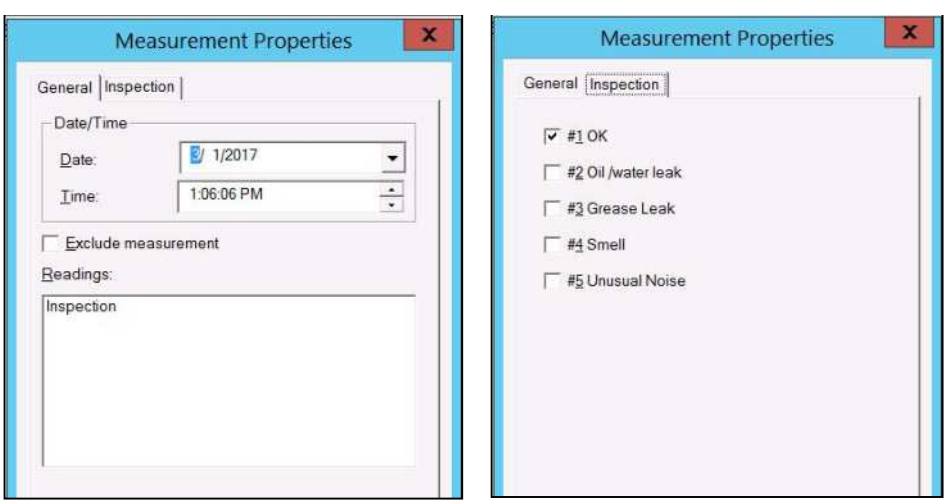


Figure A - 6.
Different Measurement Properties Window Tabs.

- Review the data associated with the selected "measurement."

  The **General** tab includes the **Date** and **Time** when this question was completed in the app as well as a list of the **Readings** collected (in other words, the data input by the operator during collection).

  All other tabs display the data input by the operator during collection.

- Click **OK** or **Cancel** to close the **Measurement Properties** window.

To view a data collected for a ROUTE's vibration measurement questions:

- Click on a measurement POINT representing a vibration measurement question. The data collected for that question will appear in the workspace to the right, with individual measurements for each time this vibration data has been collected as part of a ROUTE.
- Right-click on a measurement and select **Properties...** from the resulting context menu. The **Measurement Properties** window will appear.

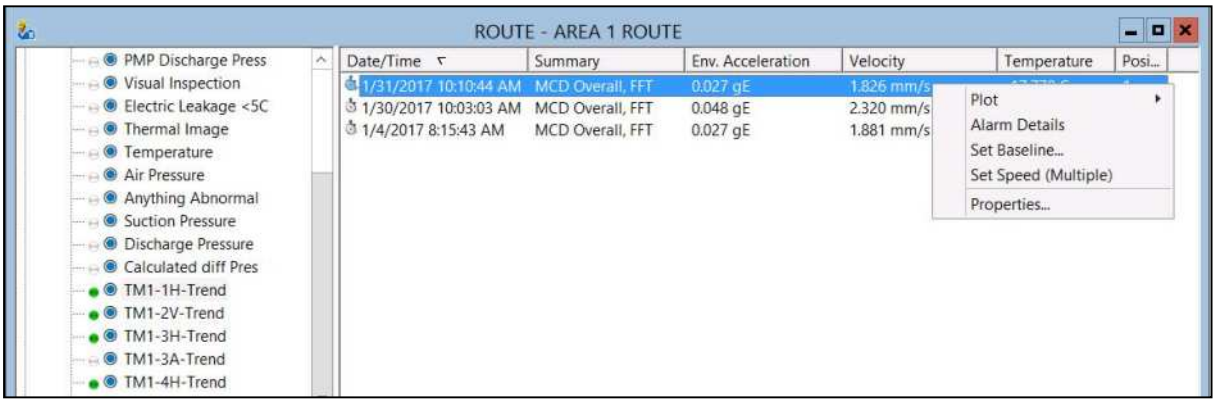


Figure A - 7.
Selecting Properties... from the Vibration Measurement Question's Latest Measurement.

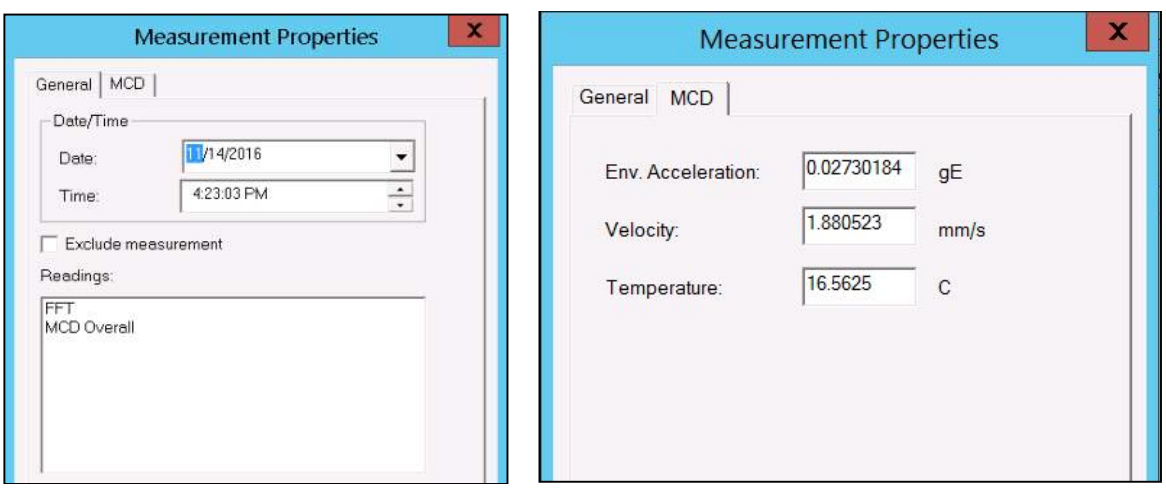


Figure A - 8.
Measurement Properties Window Tabs.

- Review the data associated with the selected measurement.

  The **General** tab includes the **Date** and **Time** when this vibration data was collected in the app as well as a list of the **Readings** collected.

  The **MCD** tab includes the **Env. Acceleration**, **Velocity** and **Temperature** data collected during this measurement.

- Click **OK** or **Cancel** to close the **Measurement Properties** window.

To view a plot of the data collected for a vibration measurement question:

- Right-click on the measurement in the workspace to the right and select **Plot** from the resulting context menu, then select the type of plot that you wish to view. The plot window will appear with vibration measurement data represented graphically.

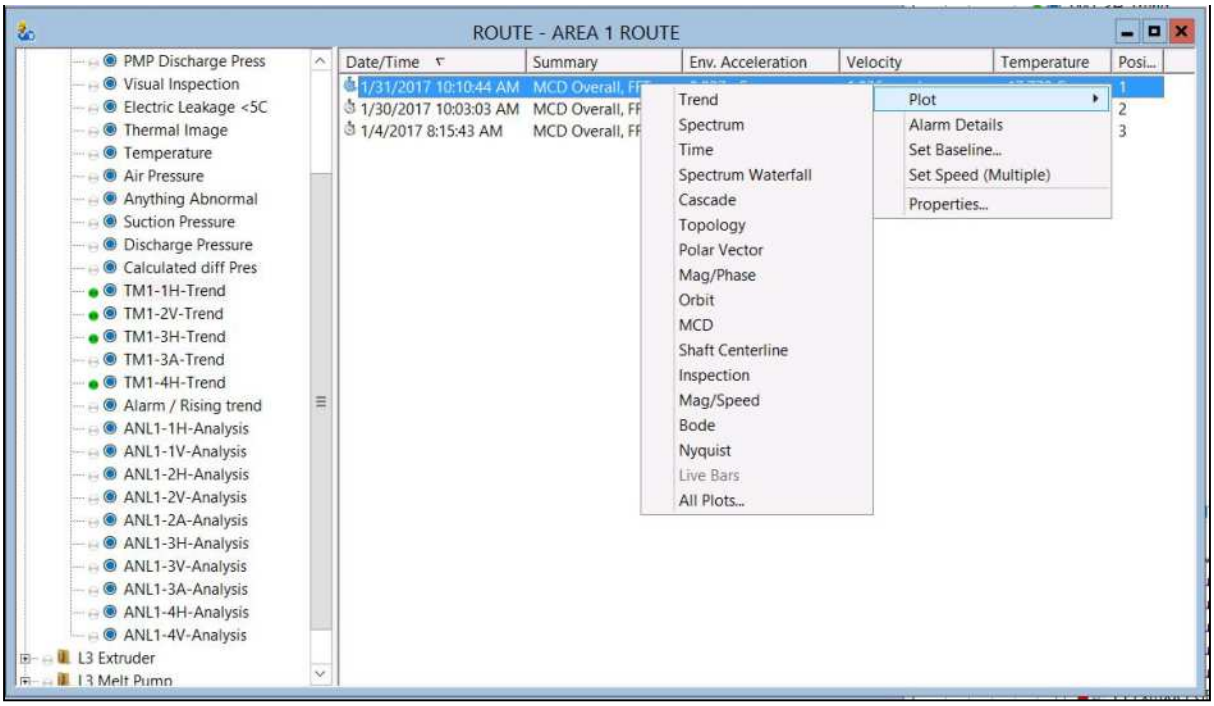


Figure A - 9.
Selecting to View the Spectrum Plot for the Vibration Measurement Question's Latest Measurement.

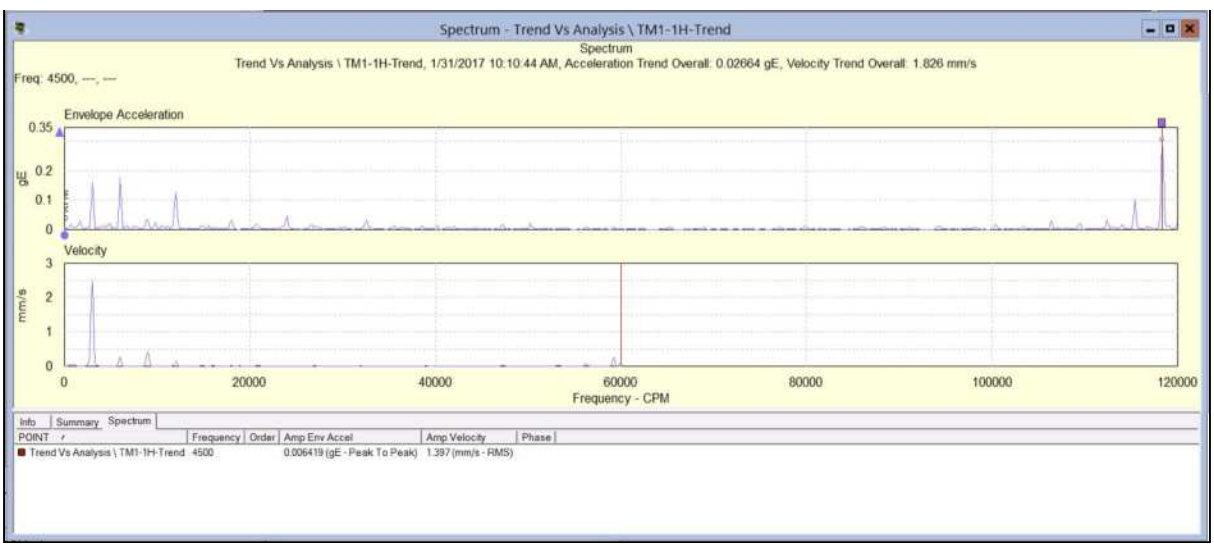


Figure A - 10.
Vibration Measurement Question's Spectrum Plot.

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