# SOFTWARE TRAINING MANUAL

*Version 2.0*

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## HOW TO LOG IN

eNTERFACE is designed so that users with specific roles can access designated areas of the system. Each user is assigned a username, password, and user role(s). When you sign into the system the following page will appear asking you to sign in using your protected username and password.


After entering the username and password you can choose the **Remember Me** box. However, this is not a recommended practice if you are using a shared computer.

The user will be logged out of the system after five failed attempts to login. If this occurs, contact administration for a password reset.

Click on the icon to reset password.


You will be directed to the following screen where you can follow the steps provided to request a new password.

Upon logging into the system, you will be directed to the Dashboard.

To the left of the dashboard is the navigation bar. The navigation bar is home to all the things you will need to navigate the system.

## HOW TO CUSTOMIZE YOUR ACCOUNT INFORMATION

Once you are logged in you will see a greeting at the top of the navigation bar. Hello, Your Name! Click on your name to edit your account information. You can change your password in this section.

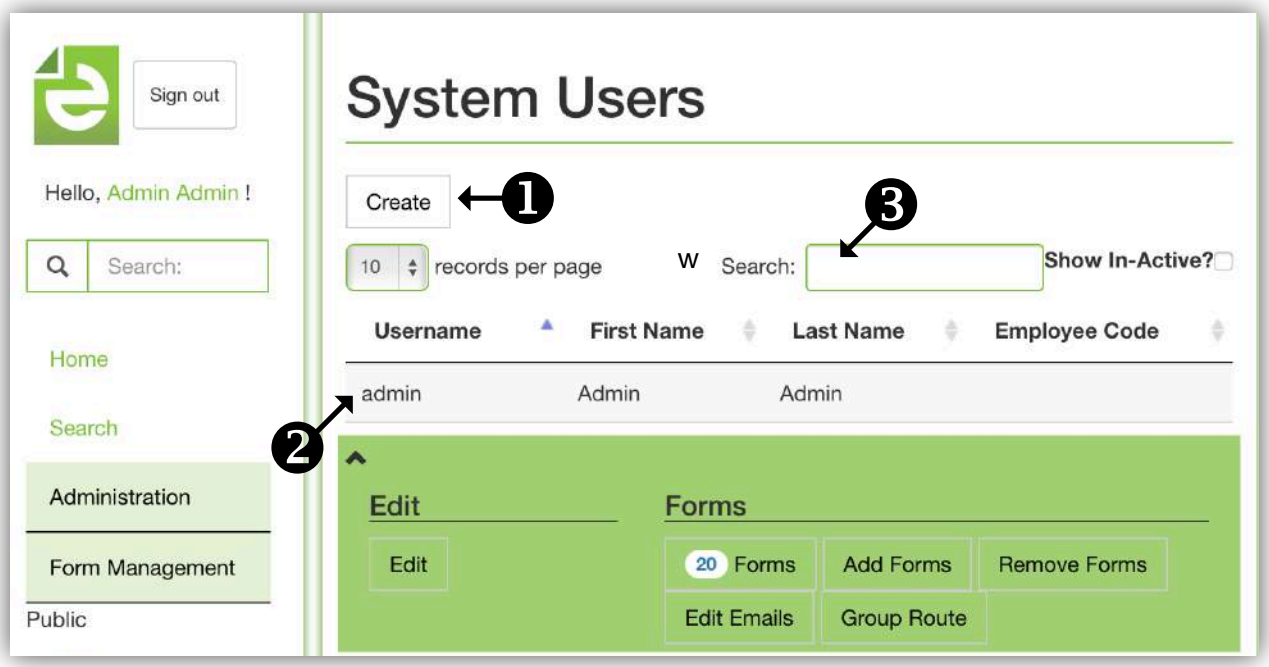
### E-Signature

There is a section at the bottom to create your personal E-Signature. You can save this signature to the system for forms that need your signature approval. E-Signatures allow you a simple “click” and sign functionality for forms that require a signature. Also, on desktop computers it is cumbersome to sign a form with the mouse.


At the prompting of these signature questions, there will be an E-Sign button. Selecting this button will input your personal signature. Be sure to save your changes.

## HOW TO ADD/EDIT USERS

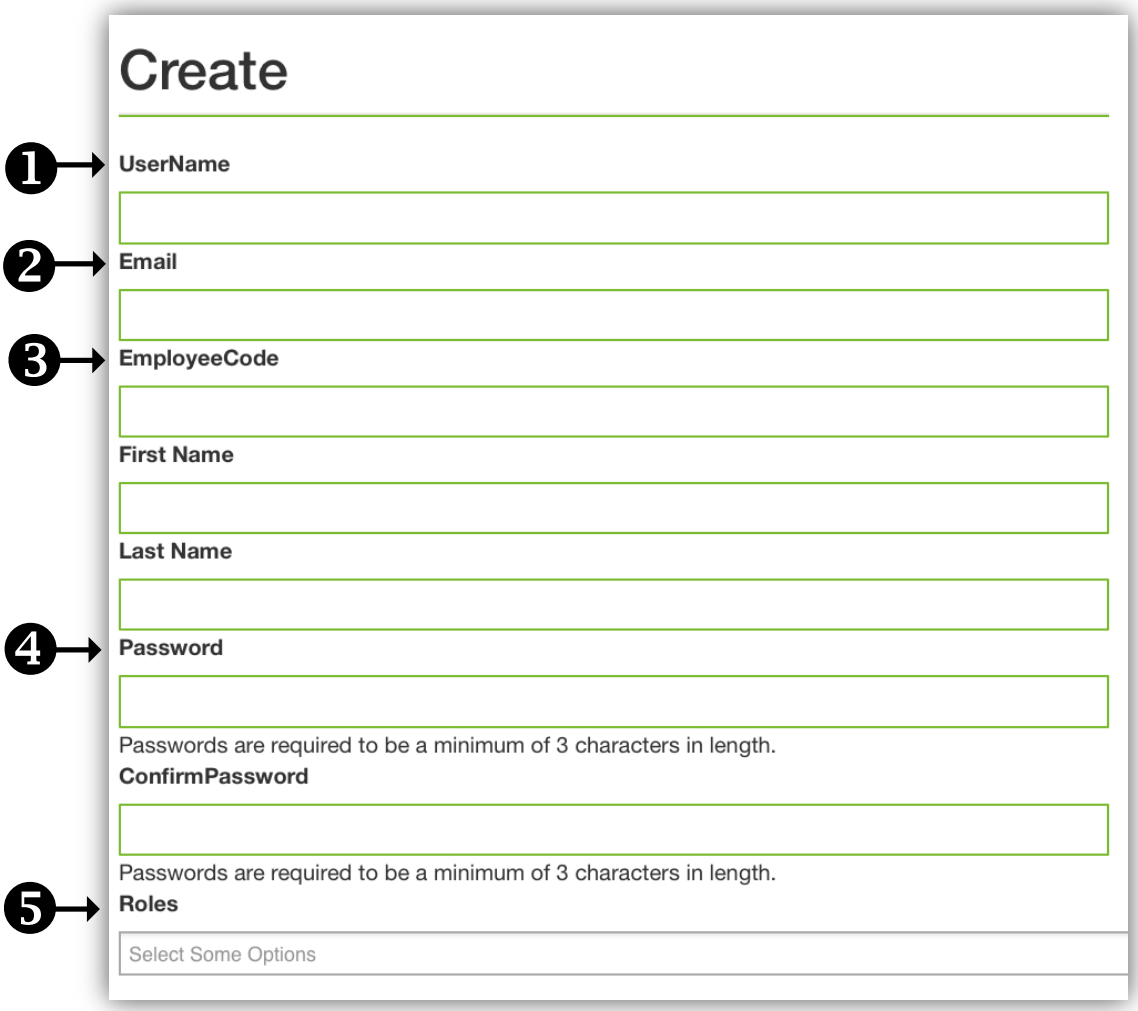
Users can be added and edited under the administration tab in the navigation bar. Clicking the *administration tab* will expand the subcategories. Click the *manage users* tab to bring up the System Users pane. Users are not limited to internal employees; they can be customers, vendors, or business partners.




1. Create a new user by selecting the *create* button
2. To edit an existing user, click on the user to access the green editing box
3. Search for existing users using the *search* box

### Creating A New User

Select the *create* button on the System Users pane. You will be directed to the following screen.




1. Select a username that will be unique to the user. This name will be used along with a personal password to enter the system.

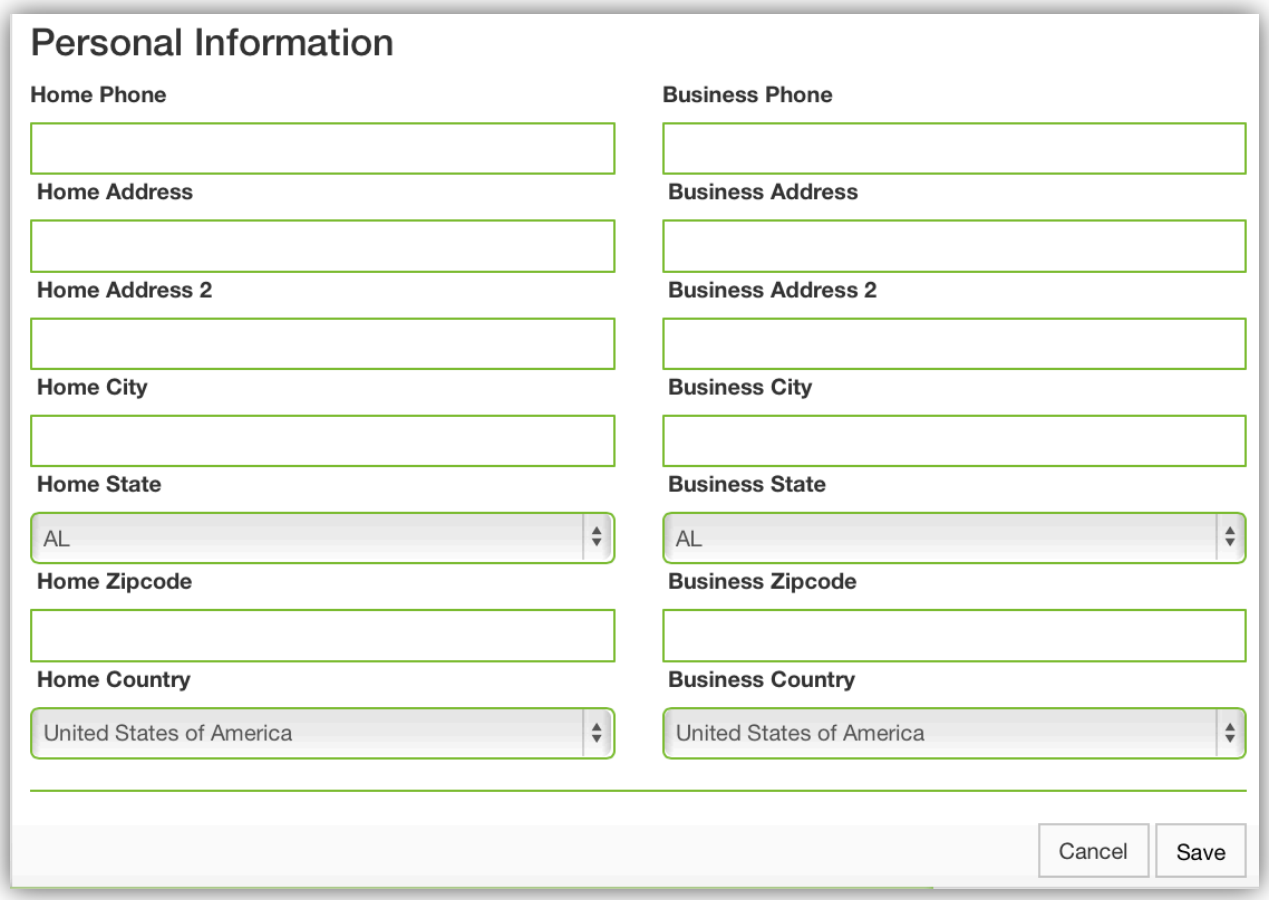
2. This email address will be used by the system to route and notify

3. The code associated with integrated accounting system; you can leave this blank if not integrated.

4. Make a secure password to protect the portions of the system that you can access.

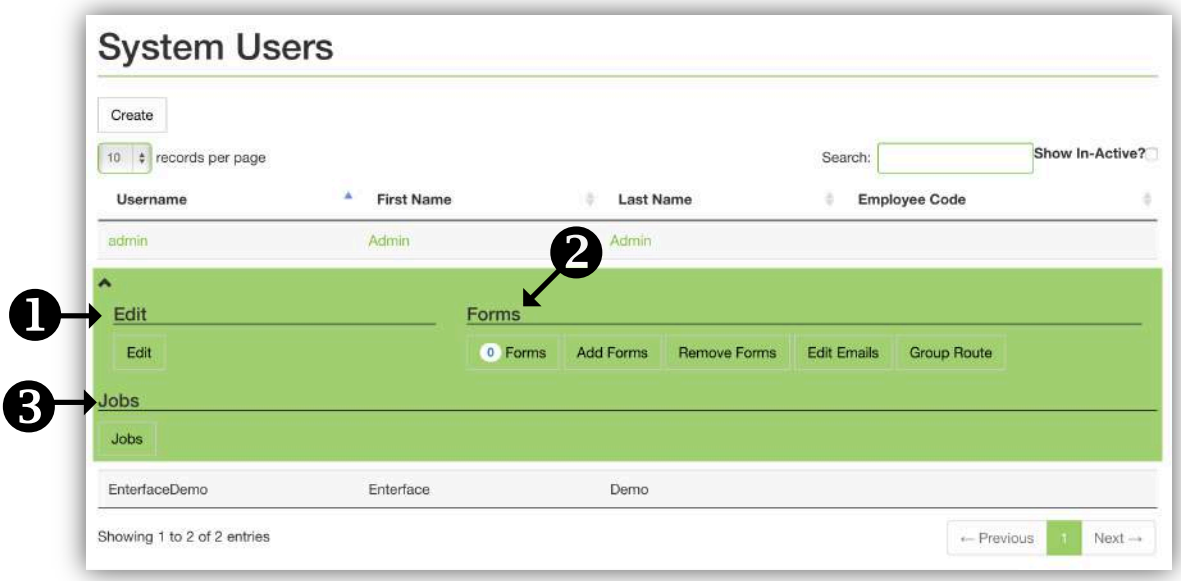
5. User roles are important for system security. They manage the content that is available to the individual user based on the admin's discretion. See Appendix B for a list and definitions of specific user roles.

The second section of the create user pane is Personal Information. This information can be useful for records but is not necessary for to create the user. Select the *save* button when all the information is input.




## Editing An Existing User

You can edit users under the manage users section under administration in the navigation bar. To edit an existing user, select the name in the users pane. A green menu will appear below the user. Under the editing screen you will be able to make the necessary changes to the user. Be sure to save the changes.



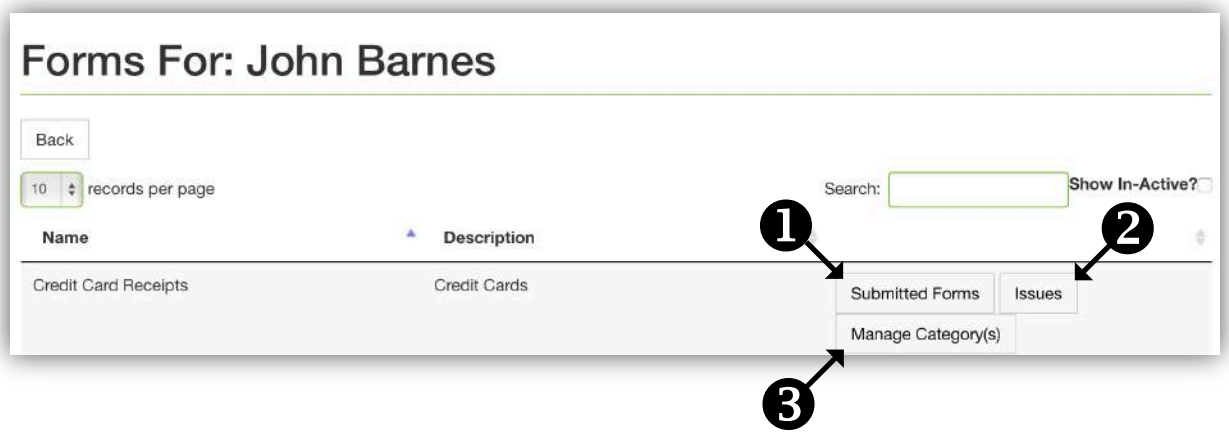

1. The edit section allows you to make basic edits to the user's information and roles.
2. The forms sections allows you to edit/view which forms are assigned to specified user.
3. The jobs section allows you to view/edit the jobs you are assigned to.

Click on the *edit* button to edit the user. You will then be directed to the following page.


In this screen you will be able to lock the user and/or reset their password. Click on the *Reset Password* button to reset the user password. Click on the *Lock User* button to block the user from the system. Save the changes to be redirected back the System Users page.

## Adding/Editing Forms

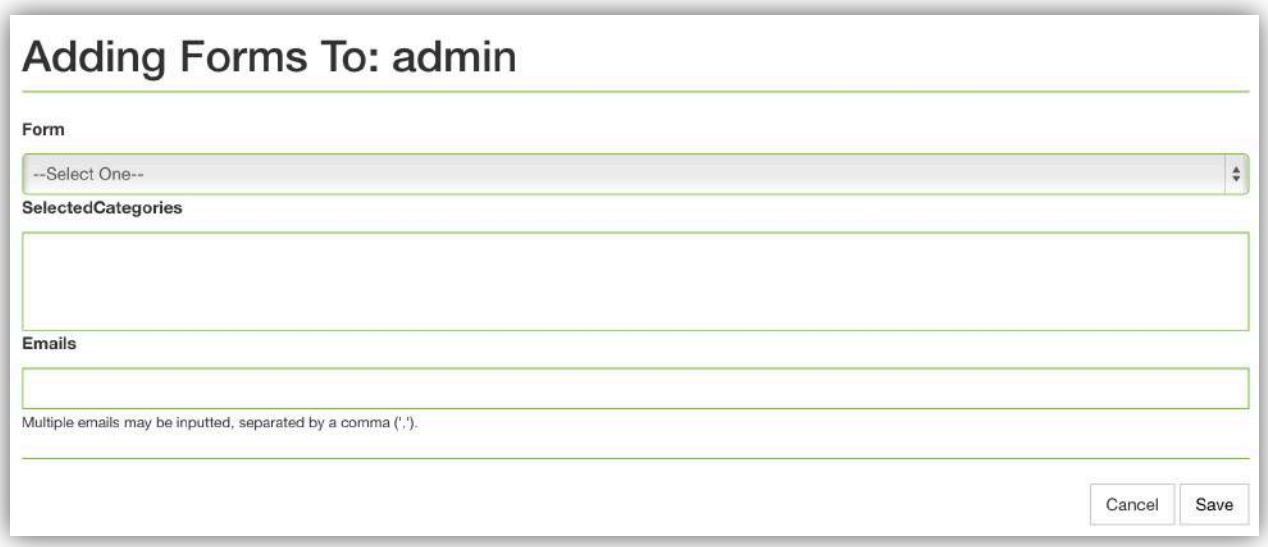
Click on the *forms* button to be directed to the following page where you can see all forms associated with the particular user. The number in the small circle is the number of forms that are associated with the user forms. You will be directed to the following screen.




1. *View Submitted Forms* allows you to view forms that have been submitted in the past
2. *Issues* button shows the issues that are associated with the form.
3. *Manage Category(s)* allows you to manage the specific categories of questions in the form.

Select *Back* when you are done viewing the forms. You will be directed to the System Users page.


Click on the *Add Forms* button to add a form to the User. You will be directed to the following screen.



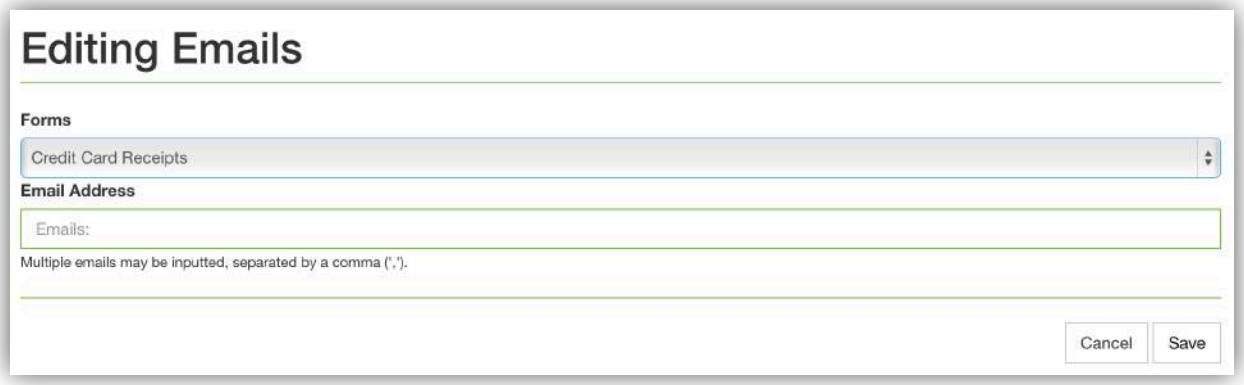

Enter the information in the spaces provided and click on the *Save* button to submit the information into the system.


Click on the *Remove Forms* button. You will then be directed to the following screen. Be sure to save the changes.

## Adding/ Editing Emails

Click *Edit Emails* to manage the email distribution of a form specifically assigned to the user.


You will then be directed to the following screen.




Click on the drop down arrow to the right of the Forms to select a form.

When a form is selected an email address will appear in the email address space. If this email address needs to be changed you can change it at this time.

When the information is entered click on the *Save* button and the new email will be submitted into the system. You will be directed back to the System Users page.

## Adding/Editing Route Rules

Select *Group Route* to view/edit the route group the user is assigned to.

You will be directed to the following screen.


Select the form you wish to apply a route rule to from the dropdown menu. Once a form is selected, you can choose from preexisting route groups. For more information of setting up Route Rules, see Appendix C.

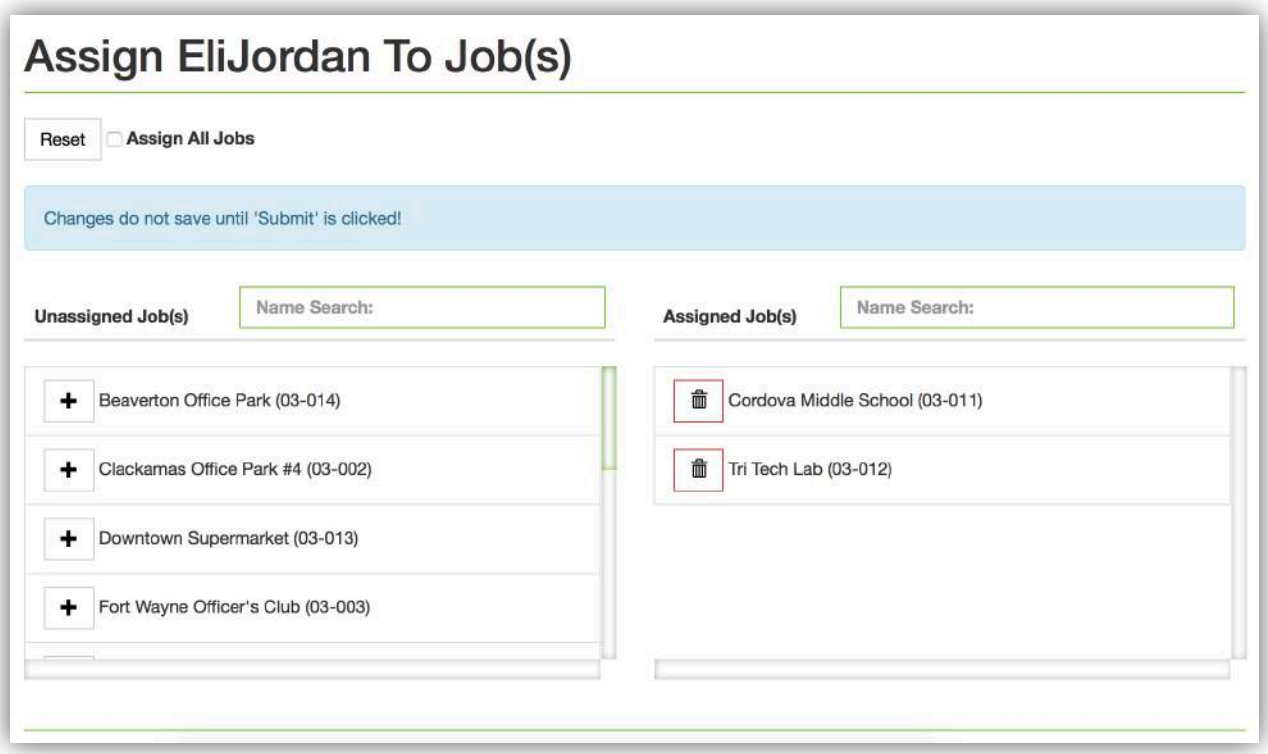
Selecting the *Allow Users to Route* box will allow the user to override the route group established for the specific form either by job or form. Leaving the box unchecked will only allow the user to submit the form and not have the option to route.

Once you have made the necessary changes, select the *save* button. You will be directed to the System Users Page.

## Adding/Editing Jobs

Jobs can be assigned to specific users. Chose the *Jobs* button to edit the Job Assignments.

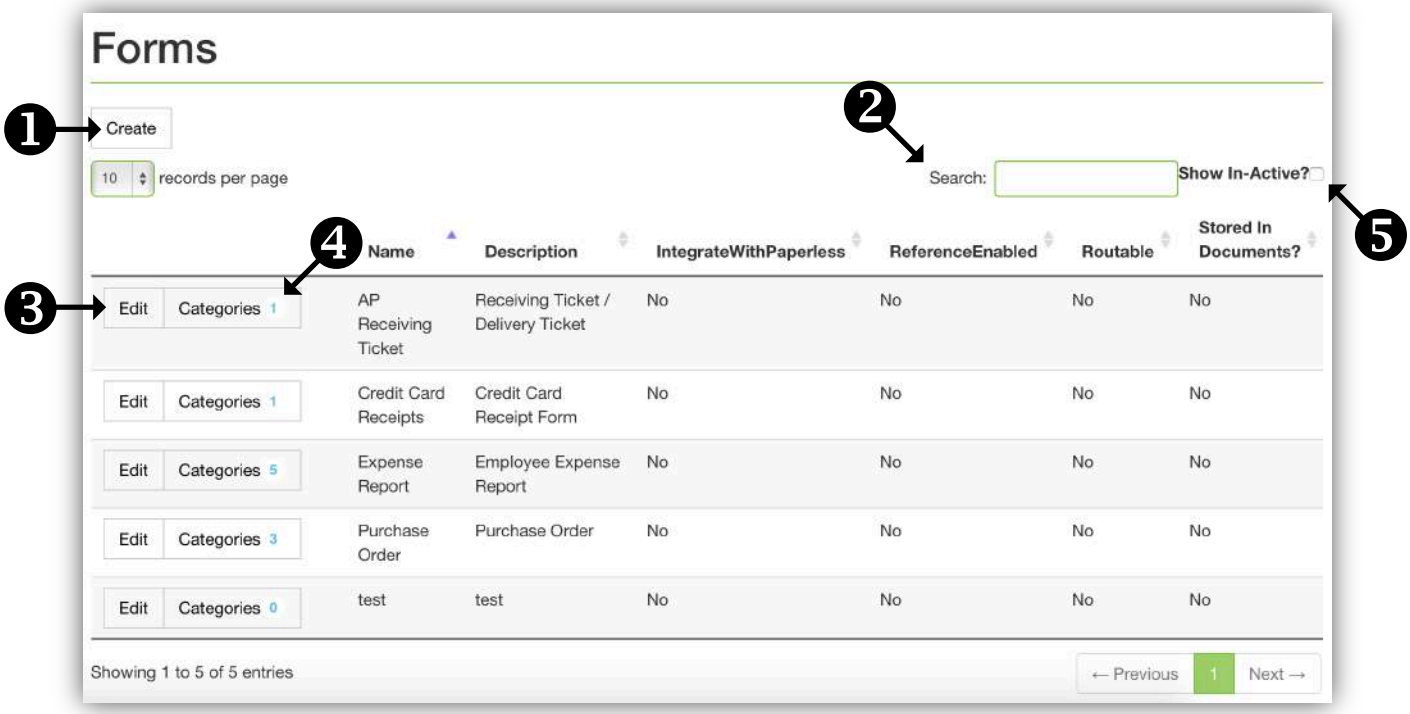

You will be directed to the following page.




You can assign the user to all existing jobs using the *Assign All Jobs* box. The unassigned jobs are to the left of the screen. The assigned jobs are to the right of the screen. Select the plus sign button to add/assign a job to the user. Select the *trash* button to remove assigned jobs from the user. Be sure to submit the edited information.

## HOW TO SETUP FORMS

You can set up forms in Manage Forms the Form Management tab in the navigation bar. You will be directed to the following screen.




Forms are listed by Name, Description, Integrated, Reference Enabled, Routable, and Stored in Docs. Also, an Active Status with the option to Edit the form and/or view the Categorie(s) of the form.

1. Create a new form.

2. Search for existing forms in the system to narrow content.

3. Edit an existing form. If there is no edit button beside the form this means that the form can not be edited.

4. Edit categories within the form

5. Forms can be marked as inactive if they become outdated, or are no longer used. Users because of records that might be linked to the form CANNOT remove forms. Contact support if you want to delete a form.

### Selecting A Form

The form wizard allows companies to tailor forms to fit any existing paper form. Forms can be built using a variety of answer typed for user to input specific types of information. See Appendix A.

## Defining Workflow

It is important to define a workflow of how your forms will move around the system. Defining how the form is going to be distributed will help you better prepare for the specific categories, questions, and distribution that will be needed to support the implementation of the form.

## Defining Prerequisites

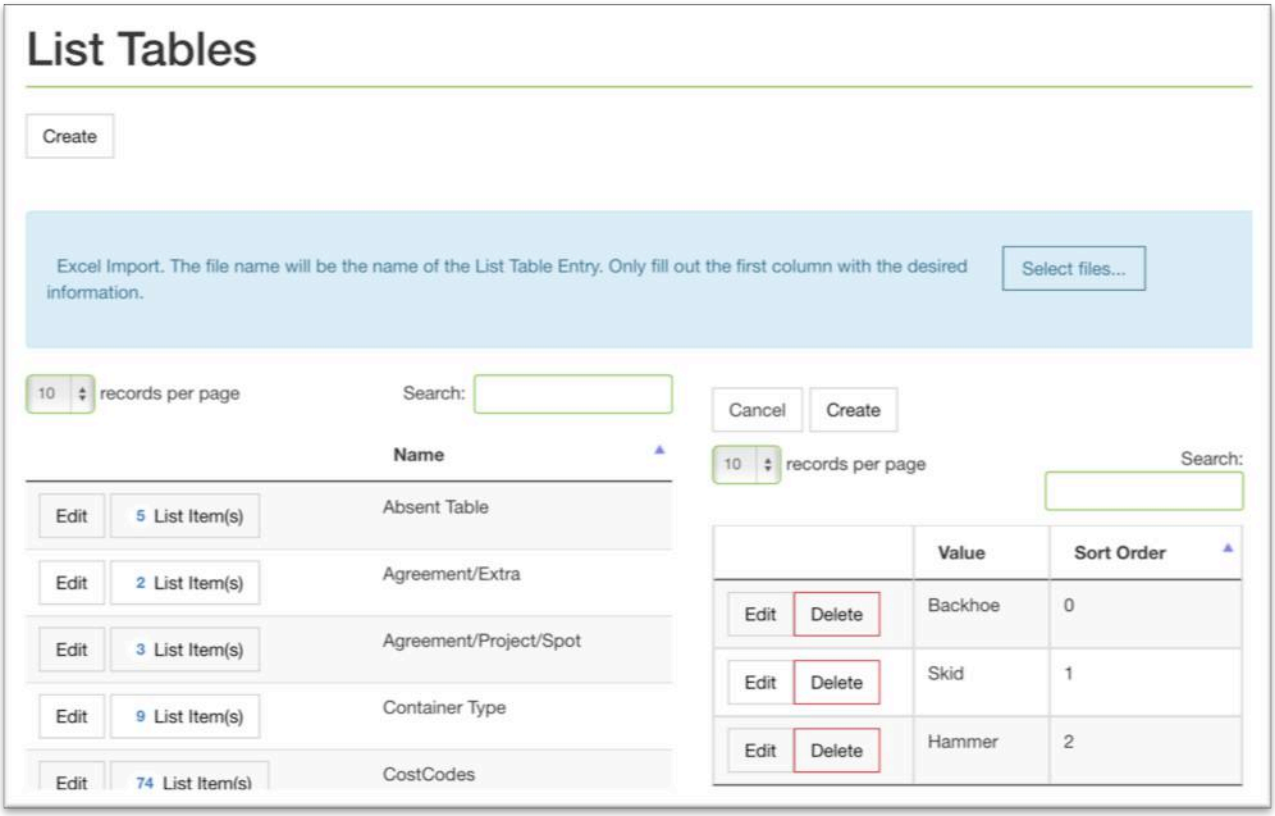
There are a few prerequisites that need to be defined before building a form. Tables and lists tables can be used in any form.

### Tables

A table is a validated lookup that is programmed to synchronize with your ERP Database. Tables are custom integration provided by eNTERFACE.

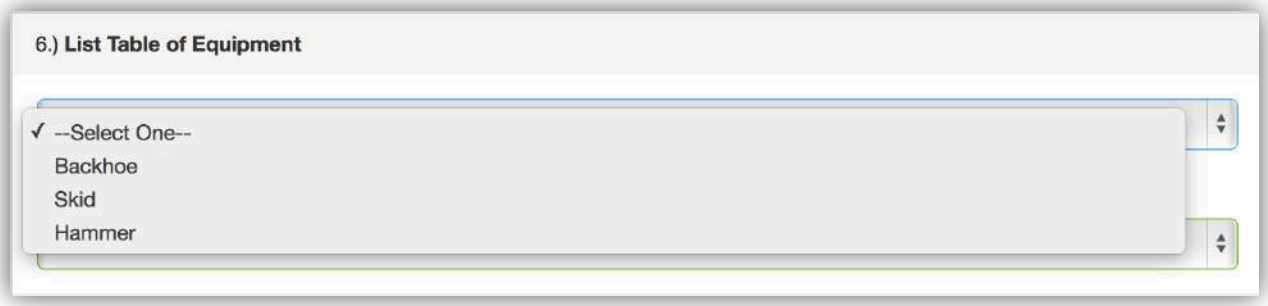
### List Tables

To define List Tables, select *List* Table under the Form Management tab in the Navigation Bar. You will be directed to the following screen.




A list table is a validated lookup that users can define. They can be created by direct entry in the system or uploaded from an Excel file.

These list tables will be available in the form as a dropdown menu for uniformed submission.




## Engineering The Form: Form Wizard

Engineering forms is easy using the form wizard. Once you have selected which form to create, you can start by selecting the *Form Management* tab. Select the *Manage Forms* tab and chose the *create* button. You will be directed to the following screen.


1. Name the form.
2. Describe the form.

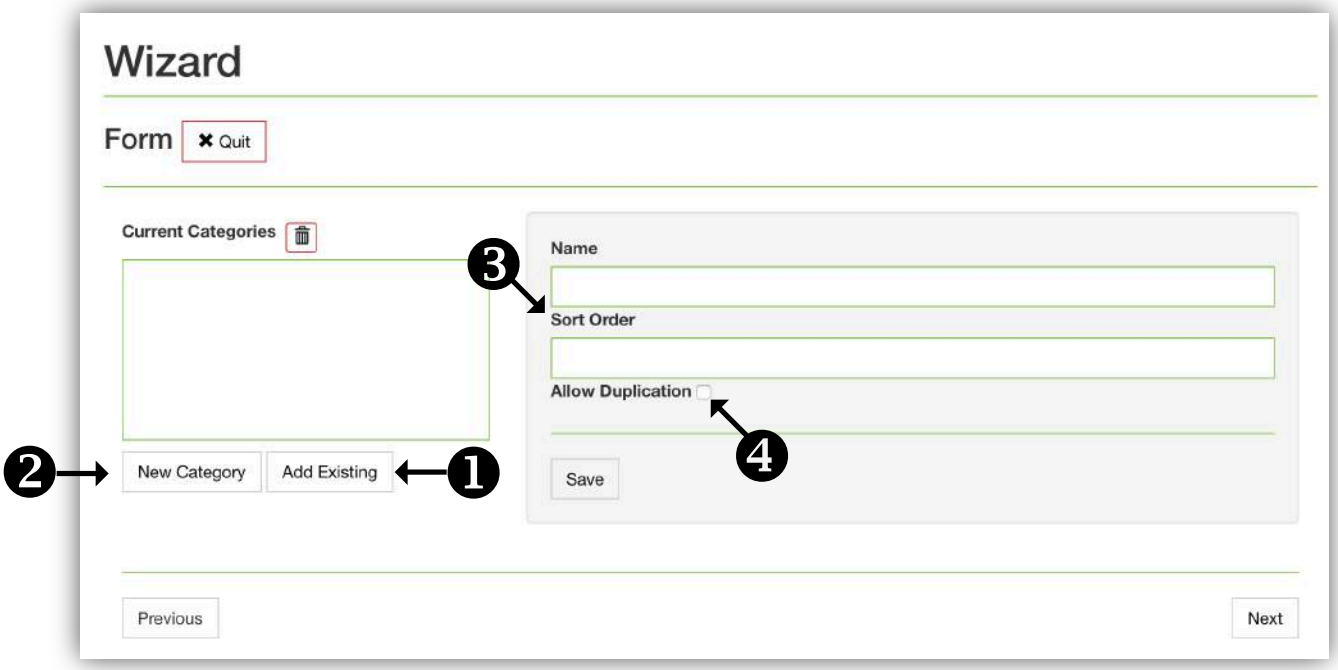
Chose the *next* button to proceed to the next portion of the form wizard. You will be directed to the following screen.

## Categories

Categories are the broad sections of questions in a form. Each category of the form will have a group of questions within it that will be defined in the next step. For now, define the broader categories.

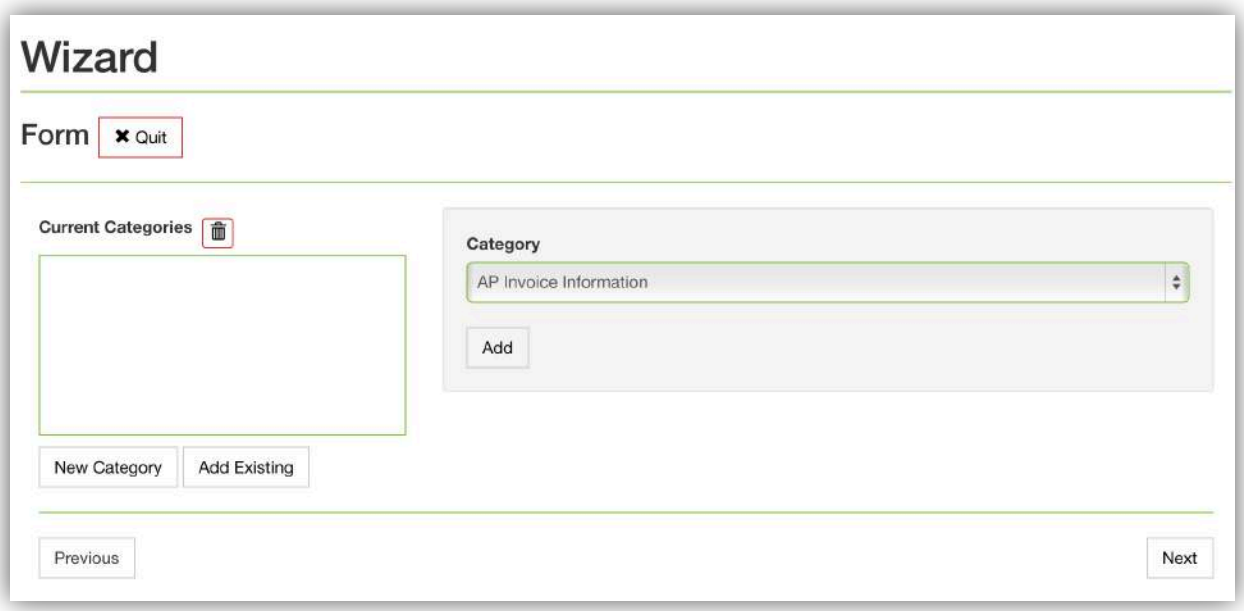
When setting up a form for a user or job, you will have the ability to add all the categories for the form, or only selective categories. Example: In a credit card receipt, you might not have job coding questions for an administrative employee

If you click on the *New Category* button you will be directed to the following where you can enter the information in the spaces provided.




1. *Add Existing* allows you to use preexisting categories. The system allows you to save reoccurring categories for use on multiple forms. Example: Personal Information
2. New Category allows you to create a new category.
3. Sort Order is a number field for the order the categories will show up on the form.
4. *Allow Duplication* allows the user to duplicate an entire category. If you chose to allow duplication of categories, you will make it possible to duplicate entire categories rather than just duplicating individual questions in a form.

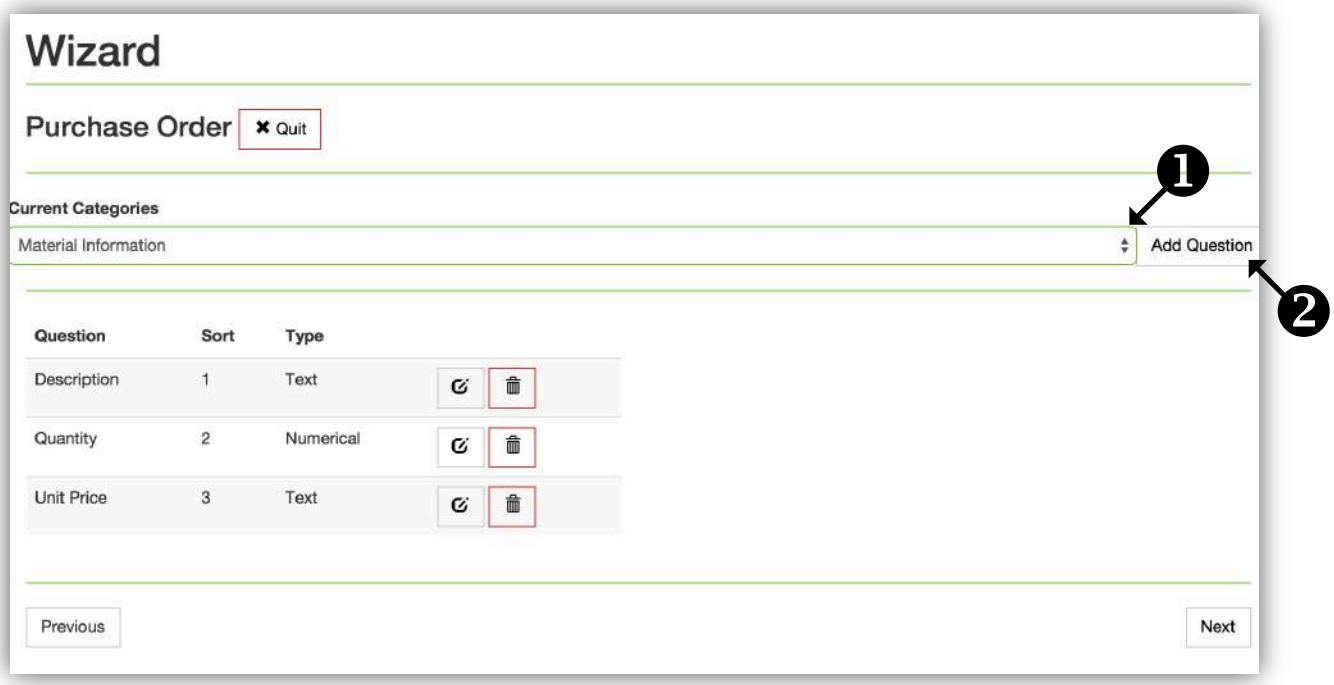
If you chose to add an existing category, you will be directed to the following screen. Select the existing form the dropdown menu to the right of the screen.




Click on the *Next* button to be directed to the next portion of the form wizard. Now, you will define the specific questions under each category.

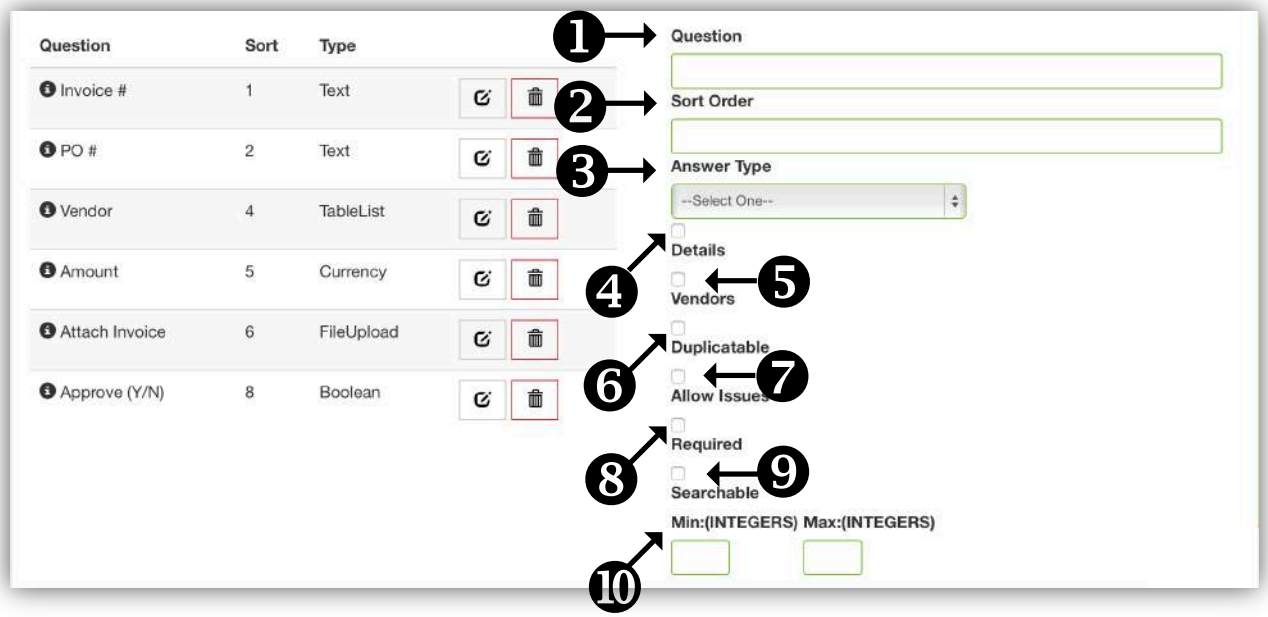
## Questions

If this is a new category, then you will start creating your question from scratch. If this is an existing category, then the questions will appear that have been setup for that category.



1. Choose the category that you want to create questions for using the dropdown menu.
2. Select *Add Question* button to add questions to the selected category form the dropdown menu.

Once you click the *Add Question* button, you will be directed to the following screen.




Now, you can define the specific questions for the category. This stage of the form wizard has many different actions that can be selected or modified to tailor-fit the form.

1. Define the *question* as it will appear on the form.
2. Select a *sort order* for the questions. This is the order they will appear on the form under the selected category. Leave space between questions for easier form building and modifications. Example: number sort ordered questions by odd numbers.
3. *Answer type* is the different ways a user can input information. You can select a text box, signature box, and many more. For a full list of answer types, see Appendix A.
4. Selecting the *details* box will input a blank text box for the user to record any details that may explain a specific answer type to the question.
5. Selecting *vendors* will insert a dropdown list of vendors on the form
6. The *Duplicateable* box allows the user to duplicate a question within a specific category
7. Selecting the *allow issues* box will allow for the user to make specific questions issues that can be defined by priority level and flagged for follow up or be routed around the system. See How To Setup Issues Management for more information.
8. Selecting the *required* box will for the user to answer the question before submitting the form. By selecting required, then this question can become a token for use in the definition of reference, email notification, document name and storage, and other areas of the program. For more information on tokens see Appendix D

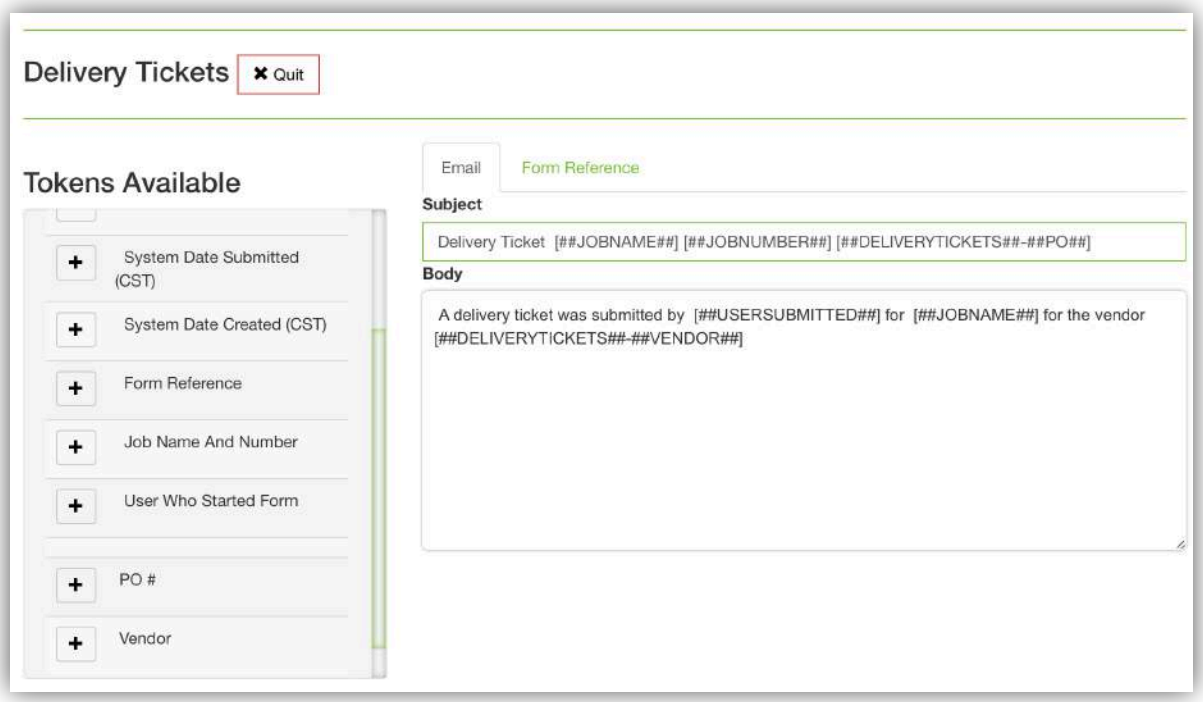
9. Selecting the *searchable* box will create a token. Define an alias by which to search this field. You can use tokens to build form outputs, populate information for emails, and search the system. This feature allows you to select this question value during advanced search in the main menu.
10. The *min/max* parameters are for integration with ERP and ECM systems where values have size restrictions. When we pass the question value to the application, we have to conform to the min/max size to insure accuracy in integration

Be sure to save the questions as you build them. Select the *next* button to move to the next step in the form wizard. You will be directed to the following screen.

## Tokens

The user has the ability to customize the email notifications attached to each form. For a complete list of the uses of tokens, see Appendix D.

The *Tokens Available* box has both system tokens and user-created tokens. System tokens are always available for use. The user-created tokens are those question fields that were checked as required in the previous step.



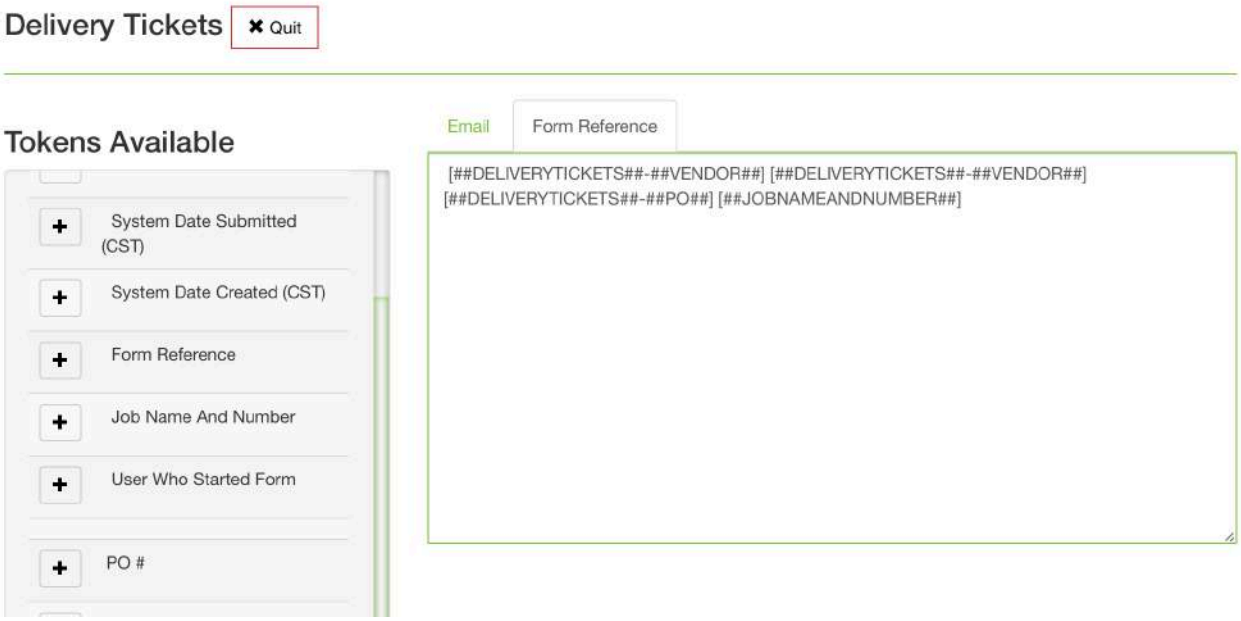

### *Email*

The *email* pane is where you can customize the emails that are sent as the form is distributed via email. You can use these tokens to populate the text of the emails for uniformed information

### *Form Reference*

Form Reference is used to automatically define the form for grids and queues that display the form.  Also, the reference is used in Quick Search.  Forms can be searched by their document name and reference.

Choose the *Form Reference* tab to assign tokens to the form. These tokens will be the references used to search for this particular form based on your discretion.




Select *next* when you have input all of the appropriate information. You will be directed to the next screen.

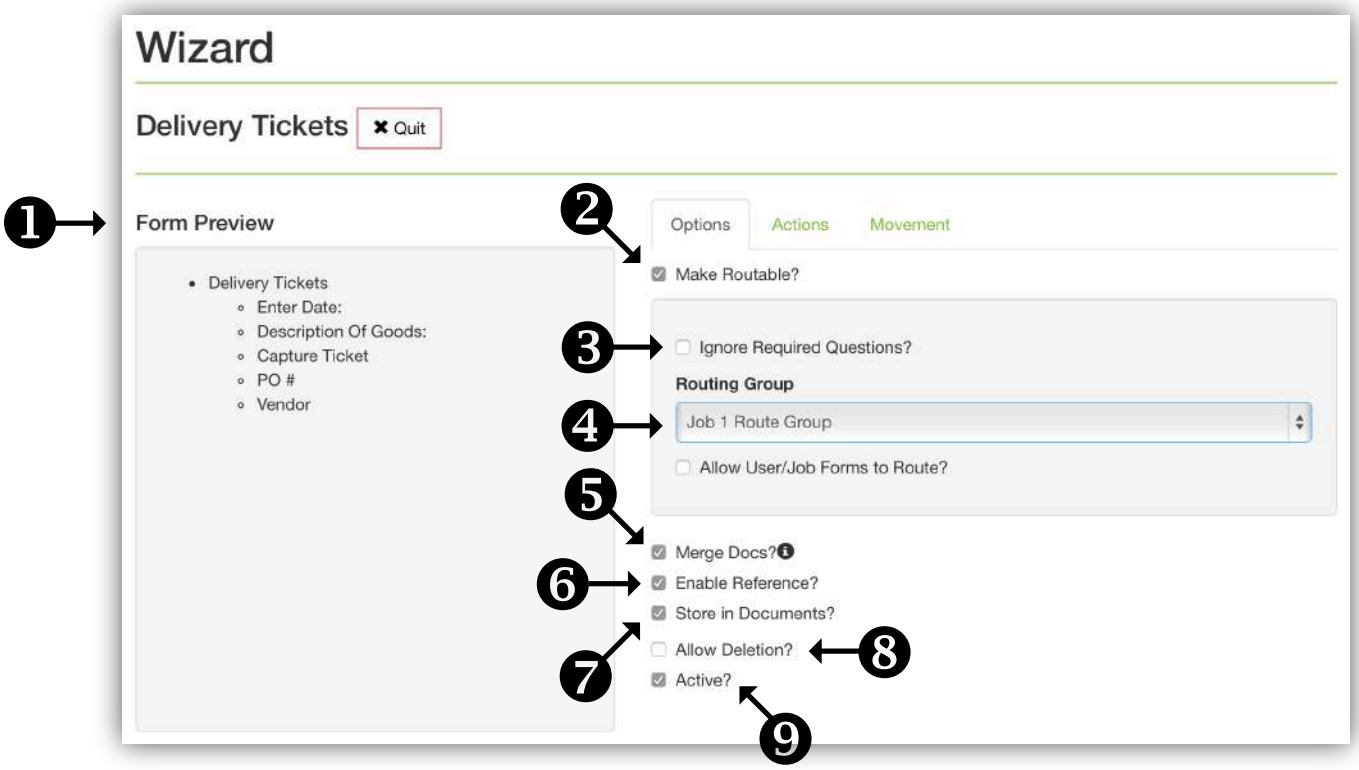
## Form Preview

This is the final section of the form wizard. The content of the form has been created at this point. Now, you are choosing the specifics of the form's *options, actions,* and *movement* in the system.  Administrators have complete control over how forms are stored and routed.

The left side of the screen has a preview of the form you are building. The right side of the screen has 3 tabbed sections for tailor fit customization.

### *Options*

The *Options* tab has a few processes that need to be defined before moving forward.

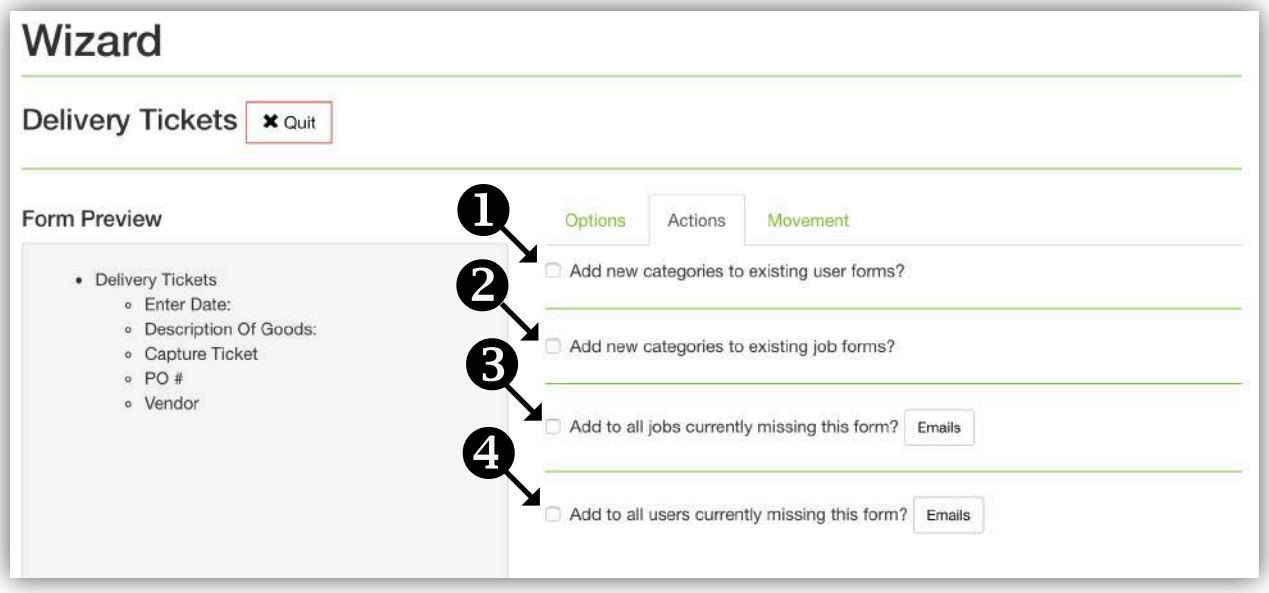



1. *Form Preview* gives a bulleted outline of the form you have just built.
2. The *Make Routable* box will allow for the form to be routed throughout the system before being submitted entirely.
3. The *Ignore Required Questions* will allow a user to route a form with required questions before being submitted. Required field will have to be entered when submitted.
4. The *Routing Group* are groups that follow a specific workflow. For information on creating Route Rules, see Appendix C.
5. *Merge Docs* will merge attachments to the form like PDFs and pictures. It will create one PDF to be distributed and stored.
6. *Enable Reference* will store the form reference setup earlier with the document for referencing and searching
7. *Store in Documents* will allow for the form to be stored in the system using document management. For more information on documents see the section on How To Setup Documents.
8. *Allow Deletion* will allow a user to delete this form in the unfinished forms section.
9. Making a form *Active* makes it visible to the user. Because you cannot fully delete a form for the purposes of previously stored information, making it inactive will hide it from the user so it looks deleted.

The next step is defining actions for the form. Select the second *actions* tab to view the following screen.

*Actions*

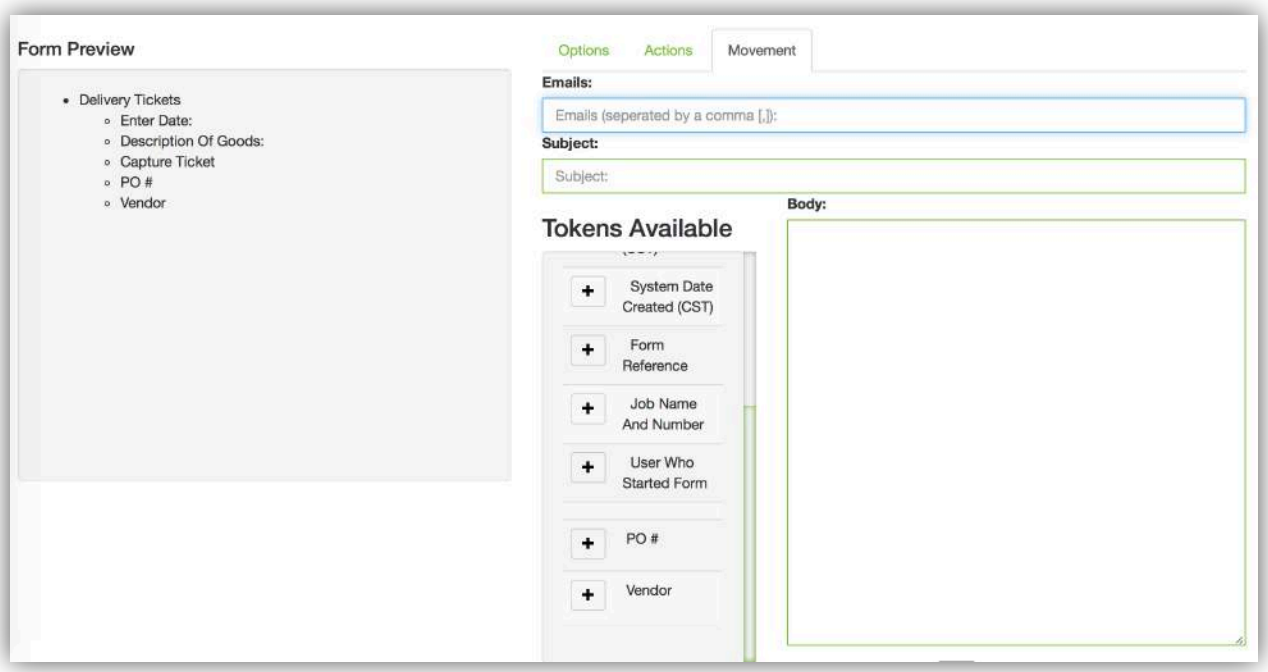
Actions are shortcut tools that will mass update forms already setup in the system, or assign forms to users and jobs that are setup in the system.




1. Automatically add new categories that are added during editing of the form.
2. Automatically add the new categories to existing job forms.
3. Allow you to add a newly created or edited form to an existing job, including the email distribution.
4. Allow you to add a newly created or edited form to and existing user, including email distribution.

*Movements*

Movement is for the email format for forms that are routed. Email notifications will be sent as the forms are routed. You can setup the format of these emails in the movements tab using tokens for customized information.




Select *Submit* once you have defined all the necessary options, actions, and movement. The form has been successfully created and can now be used inside the system.

## Form Output

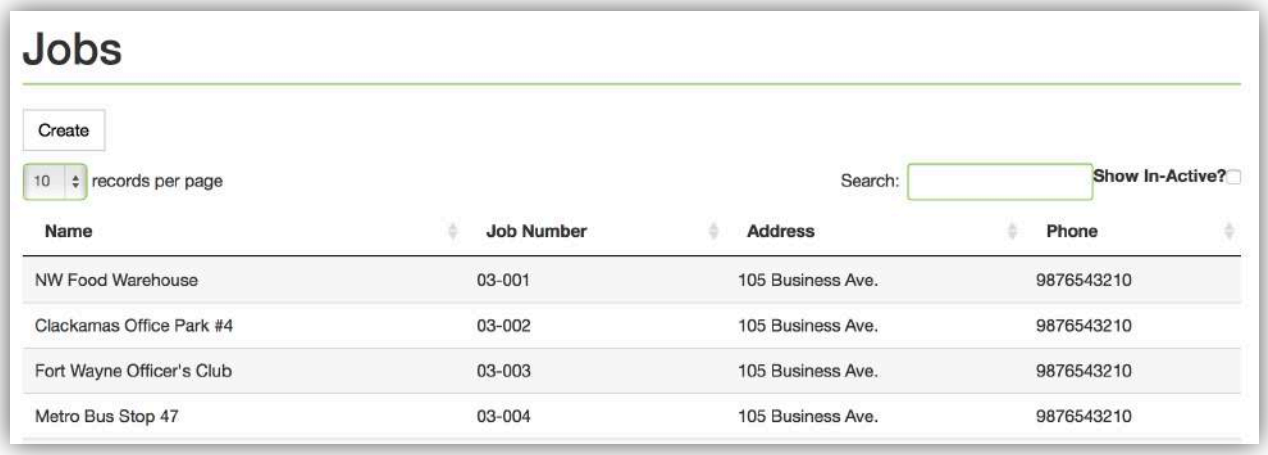
Form output can be user defined or custom. If you chose to create your own reporting you can use the Report Builder, see Appendix D.

# HOW TO SETUP JOBS

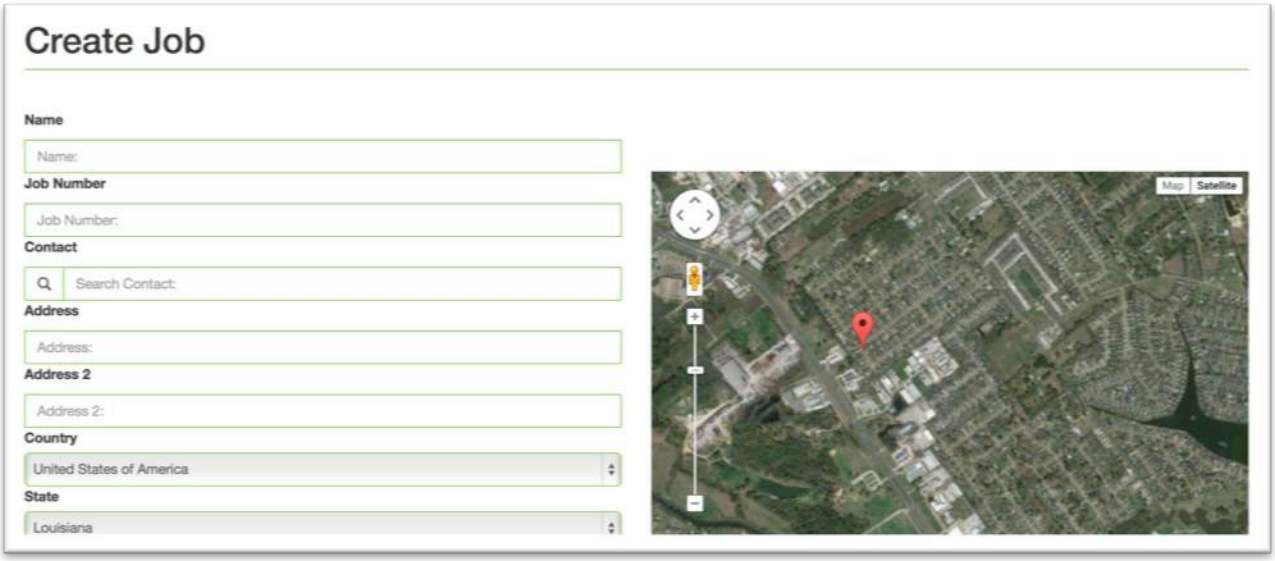
## Adding/Editing a Job

To setup a job select *Manage Jobs* under the *Administration* tab in the navigation bar. You will be directed to the following screen.

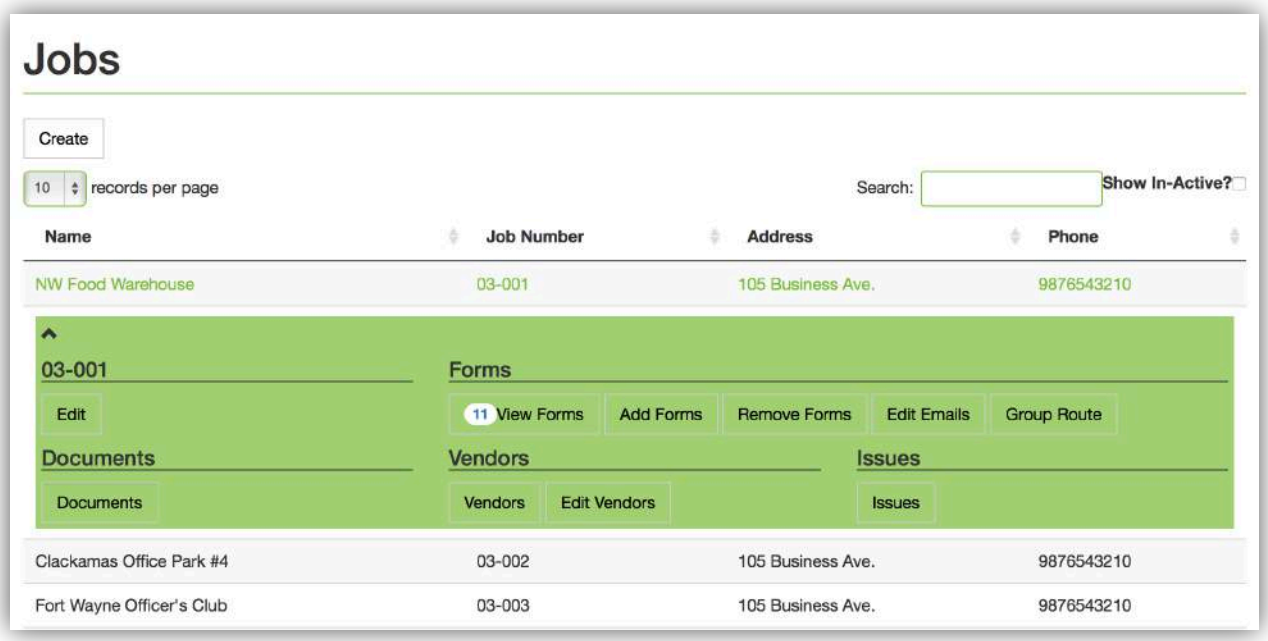
All jobs are listed by name, job number, address, and number. You can search for jobs that are marked active and inactive.




Select the *Create* button to create a new job. You will be directed to the following screen where you can fill out all the necessary job information.



Select the *Save* button or *Cancel* button to be directed back to the *Jobs* screen. Click on a specific job if you wish to edit any information. A green dropdown box will appear below the job.




Select the *Edit* button to edit the basic job information. You can assign Forms, Documents, Vendors, and Issues to specific jobs.

## Forms

The white circle shows the number of forms assigned to this specific job. Choose to View, Add, or Remove Forms that are assigned to this job. You can also edit the email notifications that go along with the forms assigned to specific jobs.

Select the *Group Route* button to make edits to the routing rules associated with the job. The routing rules can be predefined. You can select the job forms and routing rules you wish to use for this specific job. For more information on Route Groups, see Appendix C

## Documents

This is where you setup the document tree for this project.  If you select to generate the documents, then when you go to documents if you have the access you will see the folder (root) for this job. For more information on documents, see the How To Setup Documents section.

## Vendors

You can view and add the vendors that are associated with each individual job. This feature is not used when enterface is integrated with the ERP system. This will allow you to show the vendor lookup by job when selecting the vendor checkbox in the form wizard.

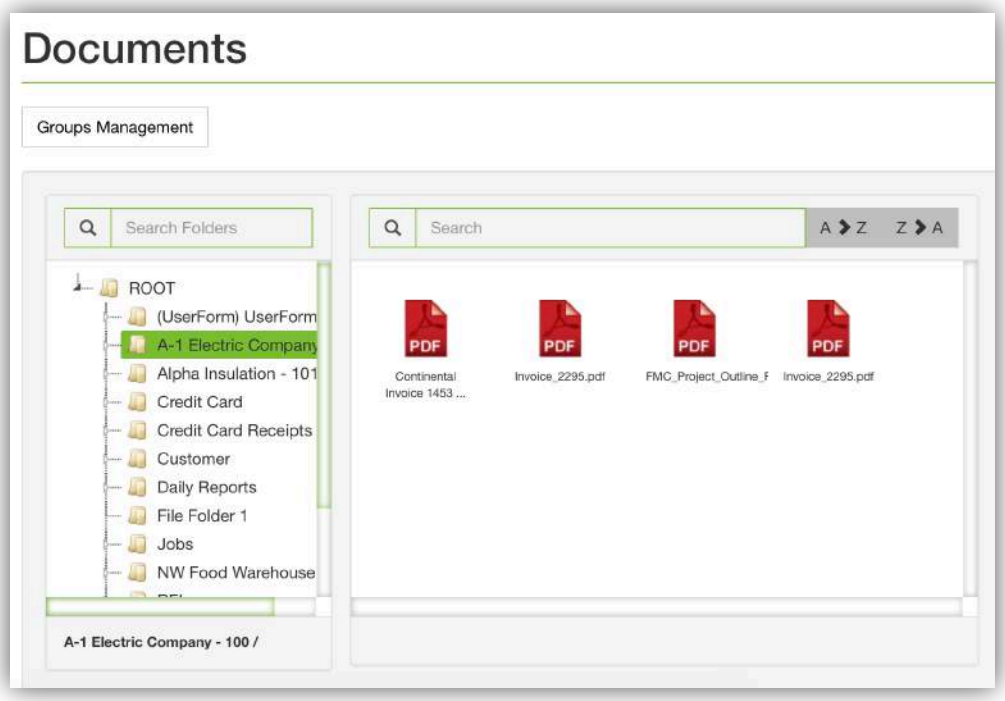
### Issues

Issues will display the open issues for that job.

## HOW TO SETUP DOCUMENTS

The eNTERFACE portal has the ability to store documents and files generated from the system or added via Drag and Drop from another file system. Like Dropbox™ or Google Drive™, eNTERFACE can electronically store content that can be accessed anywhere from a smart device.

To view the folder structure, select *Documents* under the Apps section of the navigation bar. Click on the *ROOT* folder to see all of the existing folders in the system.

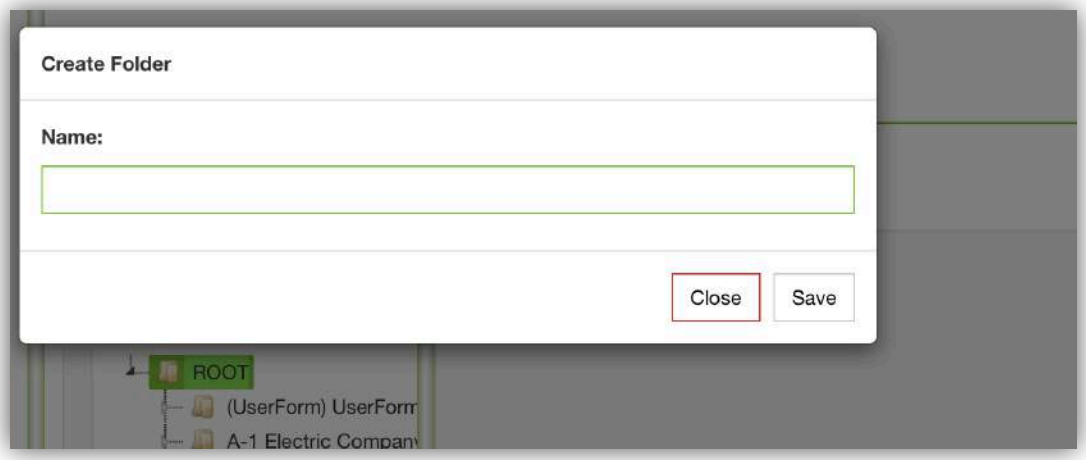



### Creating Folders

Folders can be created automatically by eNTERFACE or added and created manually to the system. To manually add folders, right click on the *ROOT* file and select *New.* Make sure that you define if you want to create a subfolder always go the parent folder and right click to create a subfolder beneath the parent folder.

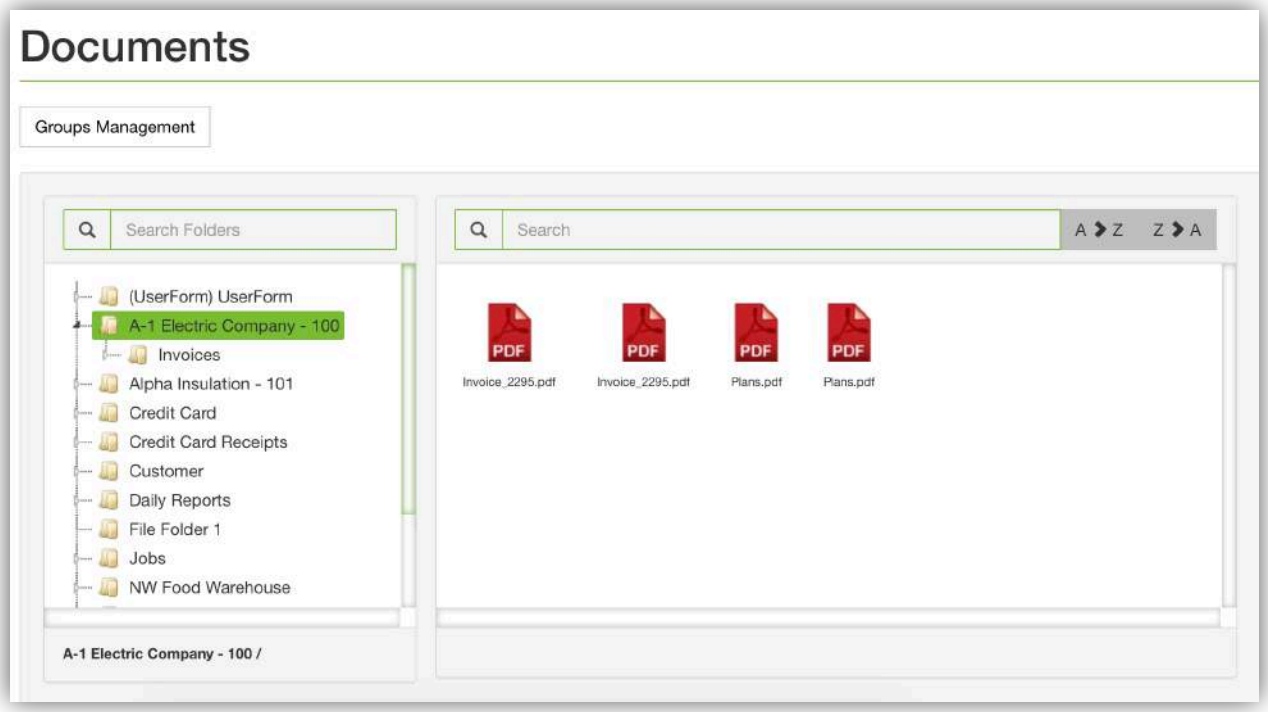
You will be directed to the following screen. Select the name of the folder you wish to create. Be sure to save your folder.  If you are a document admin role, then you can right click on the

new folder and give rights to the groups for users that need access to the folder.



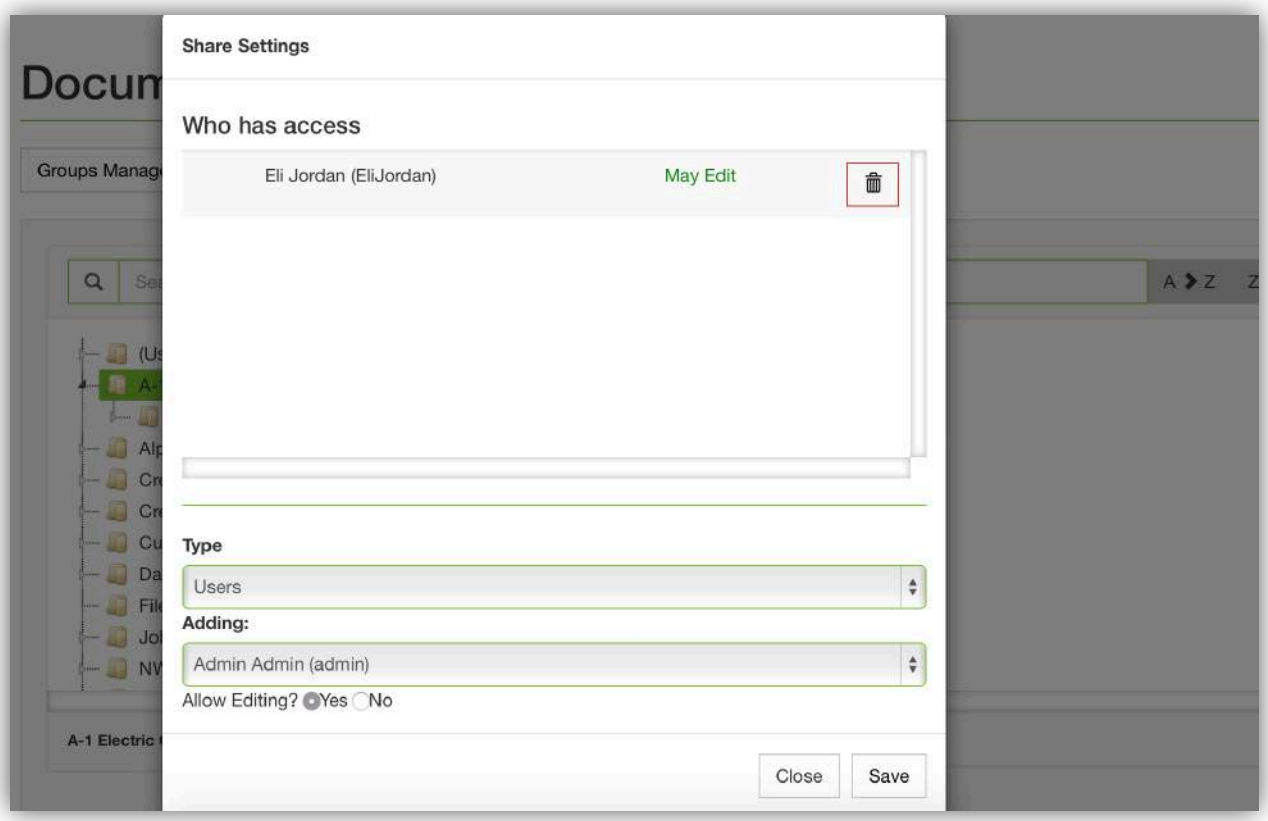

## Storing Documents and Files

Documents and forms can be automatically stored in eNTERFACE Documents by defining the folder path and file name while creating the form.




## Creating Security

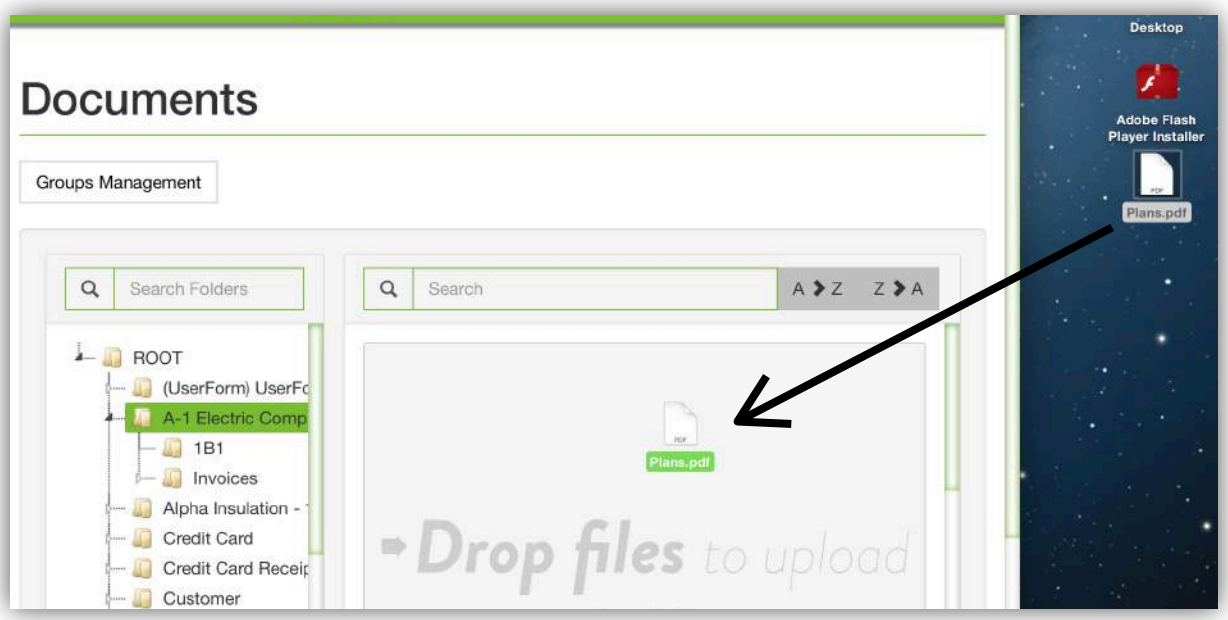
If you are a document admin, you can right click on the folder and setup security to that folder. Administrators can create groups and assign security groups to users.




## Using Documents

### Drag and Drop

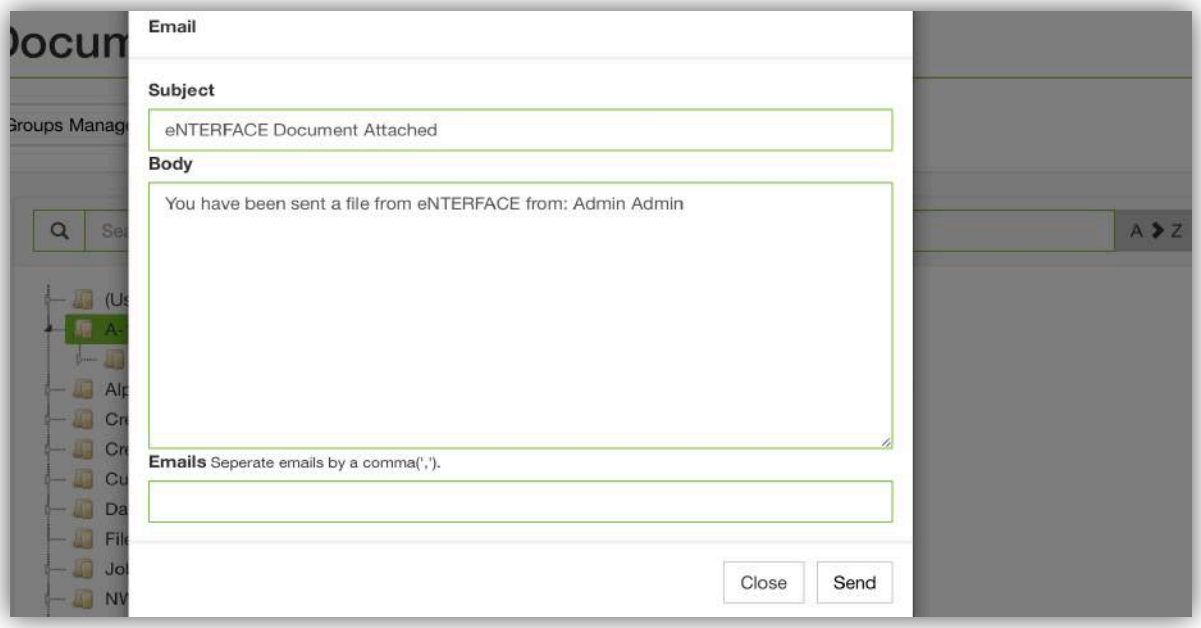
Drag and Drop allows the users to store files in the system for other, approved users to have access to. You can right click on the file once it is saved in Documents and move, rename, delete, email.




Once documents are placed in the document folders they are immediately accessible to users through the module app, desktop, or web application of eNTERFACE.

## Distribution

Files can be distributed by right clicking on the document and selecting the email option. They can also be downloaded and stored on local workstations or phones that have the ability to store files.

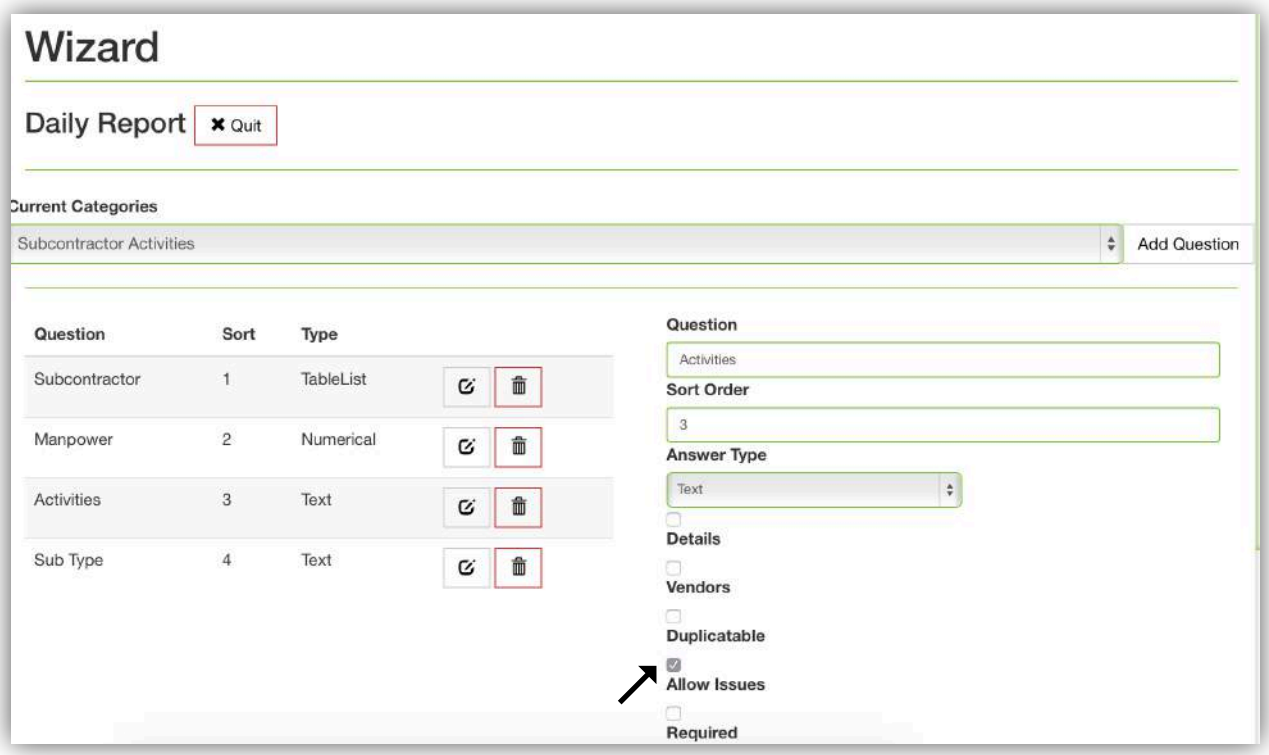


## HOW TO SETUP ISSUES MANAGEMENT

Issues can be assigned and escalated as problems arise on the job. They can be tracked and managed all in one system until closed. Issuers can be assigned to other user with email notification. Issues can be email distributed to internal/external parties for notification and action.

### Creating Issues In A Form

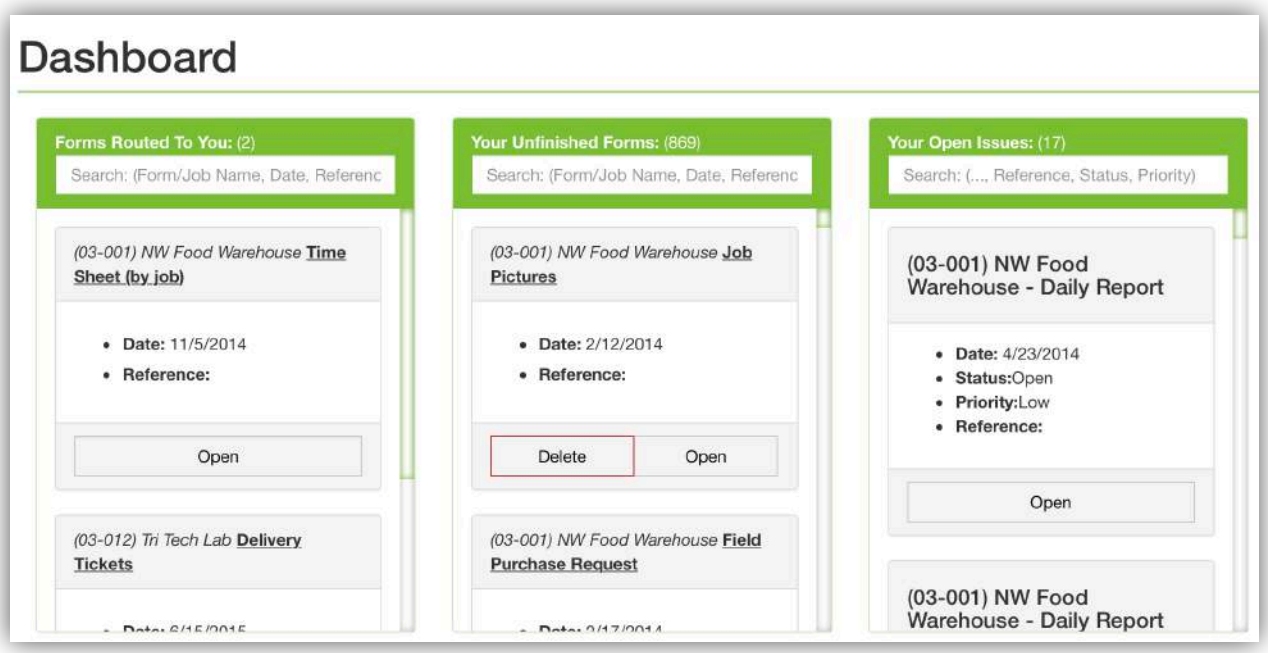
Issues can be setup from the Form Wizard and assigned to specific questions to track and manage. You can select the *Allow Issues* box under a specific question in the Form Wizard. For more information, see the section on How To Setup Forms.



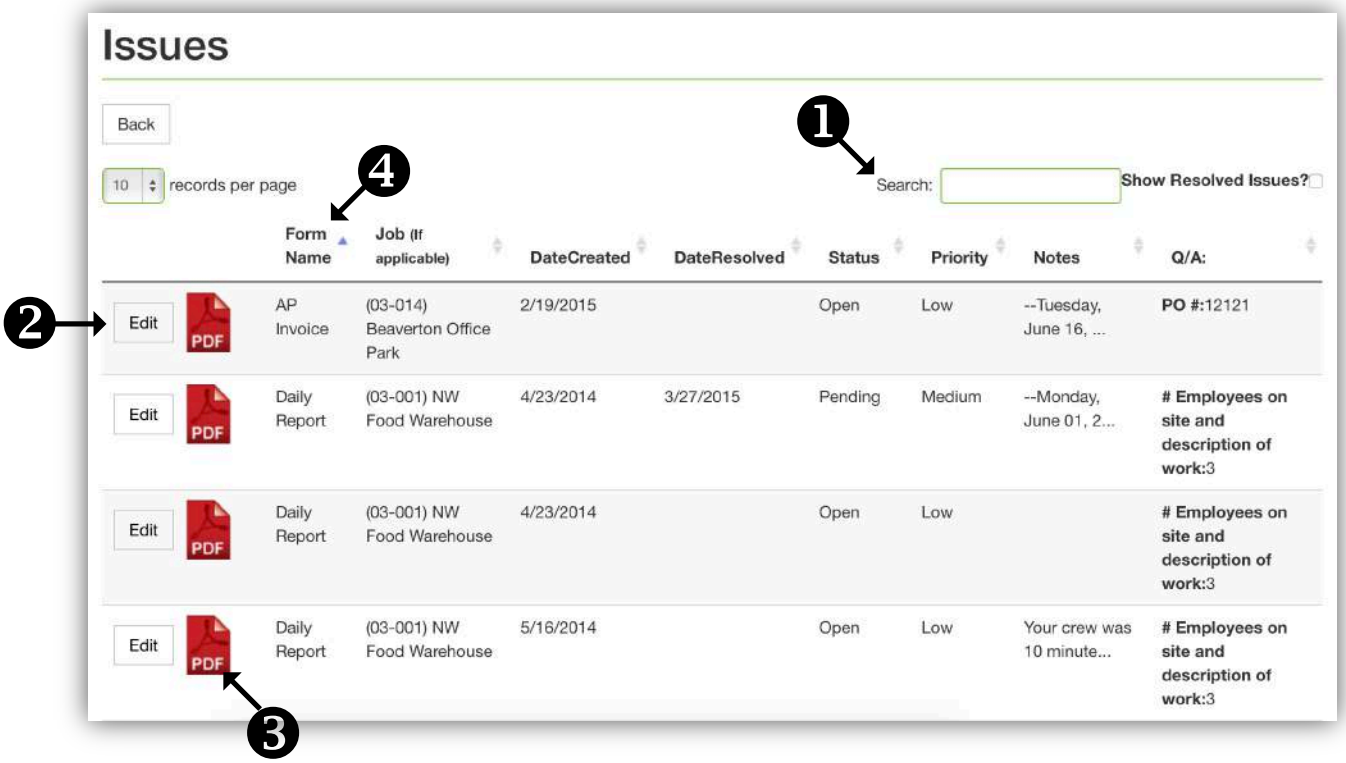

Once the form is setup to *Allow Issues*, the user can easily create, track, and manage issues as they arise in the field. These issues can be edited, routed, and closed with ease in the system.

### Edit/Route/Close Issues

Open Issues can be seen in the Dashboard upon logging into the system. You can search and edit the issues that pertain to the specific user.




Also, Issues can be accessed and edited under Issues in the Navigation Bar. You will be directed to the following page.




1. Users can Search for issues and filter Resolved Issues.
2. Edit allows you to make changes to any of the criteria of the issue.

3. Select the PDF icon to download/view the issue.
4. Columns allow the user to view *status* and *priority* of *issues* along with any *notes* associated. Also, the questions that initiated the issue.

# HOW TO NAVIGATE THE MOBILE APP


## Downloading The App

You can download the app from the Google Play Store or Apple App Store. Search for eNTERFACE Forms. The developer name is eRisk Consulting. This first time you login will be the only time you will need an access code to validate.

## Logging Into The App

Once you have downloaded the mobile app, you will need an Access Code. You can get the Access Code by contacting eNTERFACE. Once you have the code, input it in the app and you will be prompted to login.

## Synchronizing The App With Portal

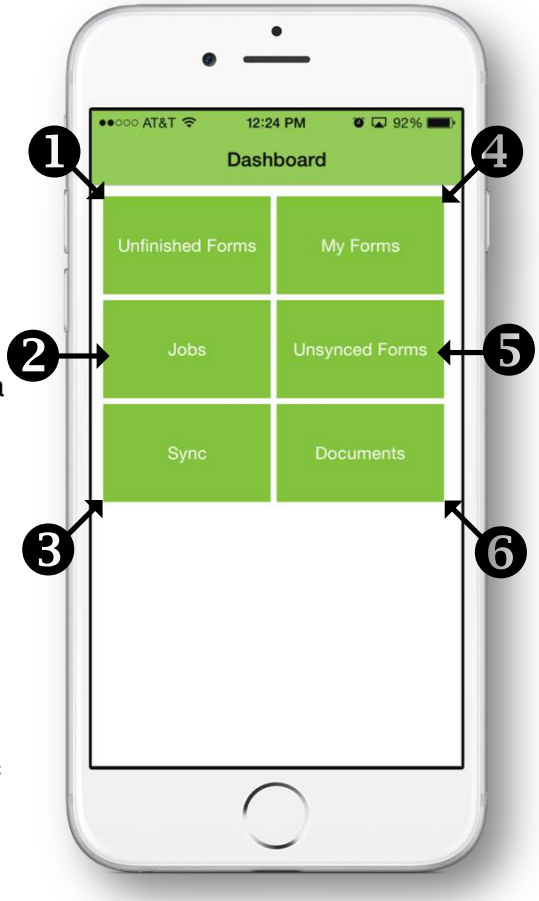
Once you have successfully logged into the application, you need to sync up with the portal. Syncing will copy the profile for your user account from the portal to the your phone. Data that is used to validate answers during form entry will be downloaded at this time. Syncing should be done daily to add any changes or additions that might have been made during the update process overnight.

## Using The App

The mobile app works very much like the desktop or web app but does have some limitations:

1. You need Internet to view the documents access panel.
2. The desktop unfinished forms and forms routed to you dashboards are also web applications and need an Internet connection. Select documents and the hit the menu and all the functionality of the desktop and web application will be available.
3. Remember, when saving an unfinished form, the unfinished forms panel only shows you the forms that are saved on your phone, not on your laptop or web application.
4. You can route forms on your phone, but will have to go through Documents to get to the web app to see forms routed to you
5. When copying forms you will only see forms that were generated on the phone, not the forms generated on the Web app or desktop.

## Dashboard




1. Unfinished Forms are the forms that are started on the mobile app, but not submitted into the system. This is where forms go when they have been saved and not submitted.

2. Jobs are the jobs you have access to. They allow you to enter forms that have been assigned to that job through the desktop portal. Caution: Sync times can be prolonged if you assign all jobs to a user and there are more that 100 jobs open.

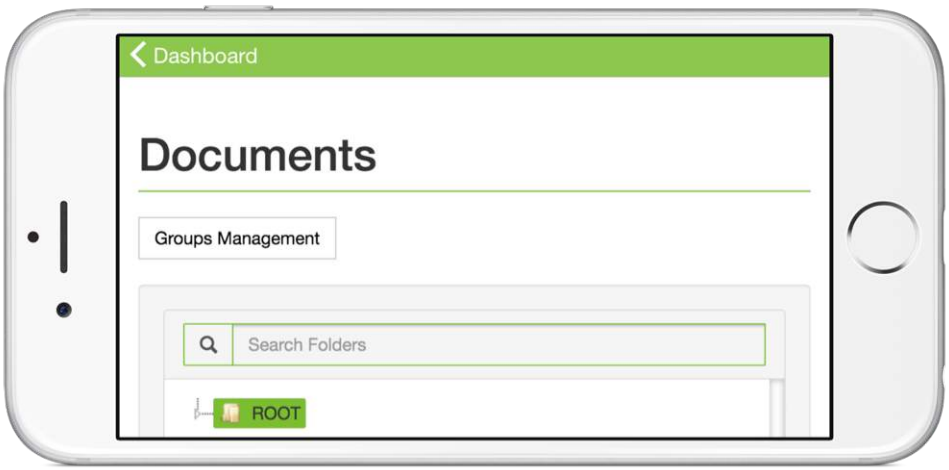
3. Sync will synchronize the user settings on the portal with the mobile app. This should be done at least once a day to insure you have the latest data from the ERP system and portal.

4. My Forms are the same forms that have been assigned to you in the portal that are not job forms.

5. Unsynced Forms hold the forms that were not successfully submitted. Typically, forms are synched immediately to the portal when submitted. However, in the event that something goes wrong with the sync, the form will stop and save itself here. You will have to manually go in when the connection is better and resync the form.

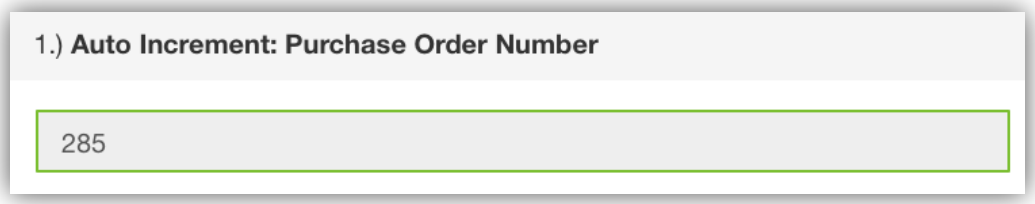
6. Documents links you to the documents module and portal through an Internet connection. You MUST be connected to the Internet to use this feature.

To get to the portal through documents hit the menu option once you have connected and logged in. Here you will have full functionality of the web portal as you would from your desktop.

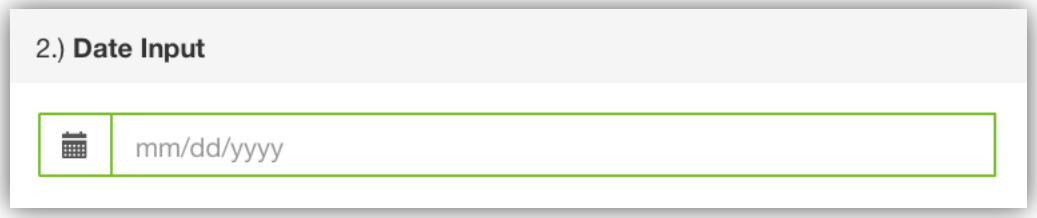


## APPENDIX A: QUESTION TYPES

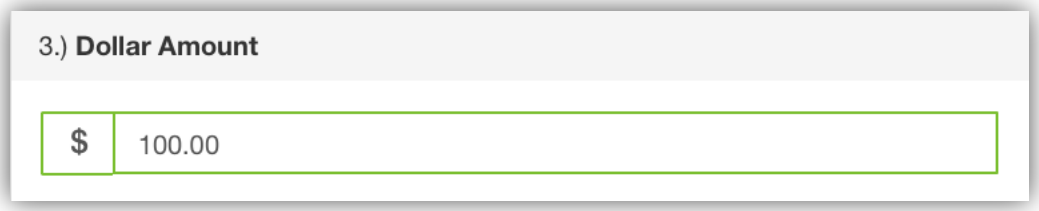
Auto Increment: automatically generate a number for a form for records. Example: purchase order numbers can be assigned by eNTERFACE and passed to the PO module of your ERP software. On the Mobile App you can request a PO # and the phone will connect to the Internet and pull the next #. This allows you to keep a synchronized # system from multiple user who create the form.




Date Input: Set the date from the pop up screen.




Dollar Amount: Key in the dollar amount from the pop up screen.




File Upload: Upload any type of file other than image file. Here you can attach files to a form. Ex. PDF, XLS or XLSX, DOCX, etc.

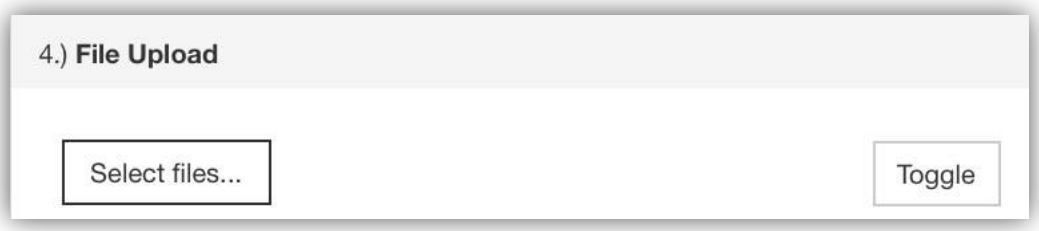
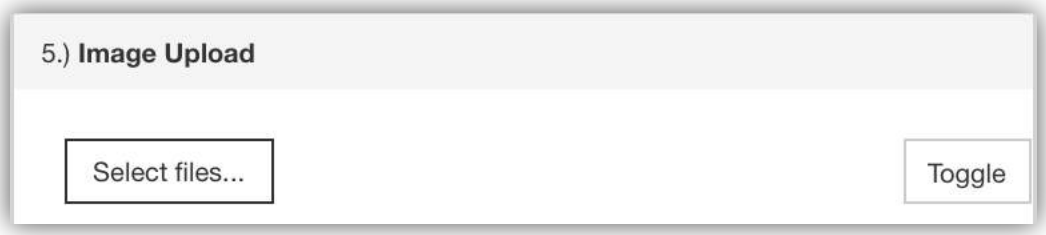
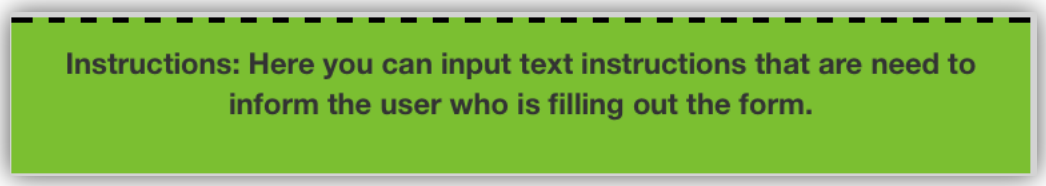


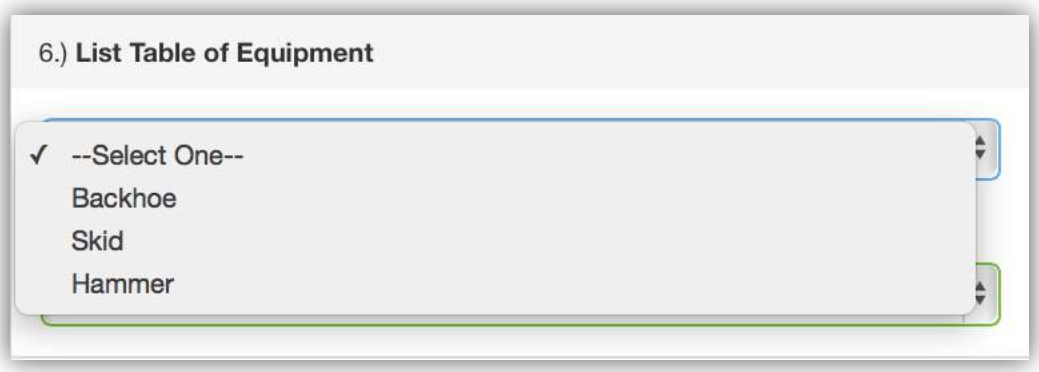

Image Upload: Captures a picture using camera connection or upload from phone/desktop gallery.




Instructions: The form can have a green highlighted section for giving instruction to filling out the form.

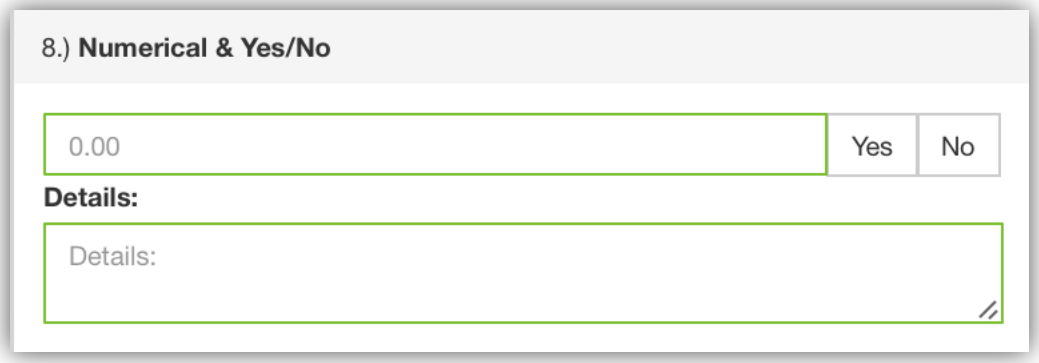



List Table: Allows the user to build tables that specific to a form. Allows users to define specific answers to questions.

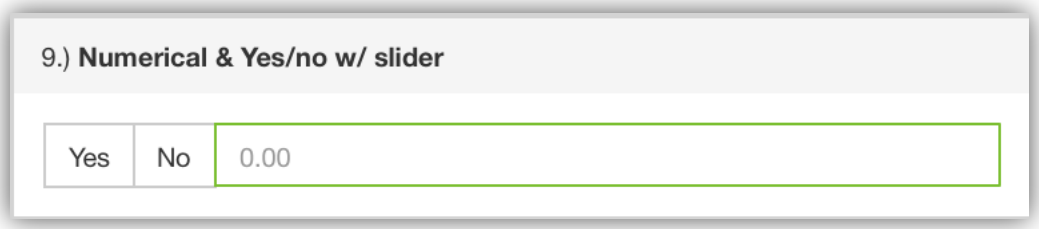



Priority Level Normal-Urgent-Critical (3 Button): Assign a priority level for issues management.

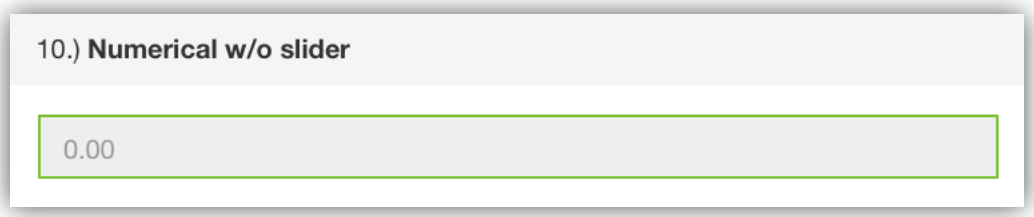

Numerical & Yes/No:




Numerical & Yes/No w/ Slider: Allows you to answer a question and enter a specific numerical value.




Numerical w/o Slider: Allows for basic input of numbers into the system.




Signature: E-Sign allows you to store your signature in the portal. Or this answer type, press the button and your signature will appear in the box. See the section on How to customize your account information.

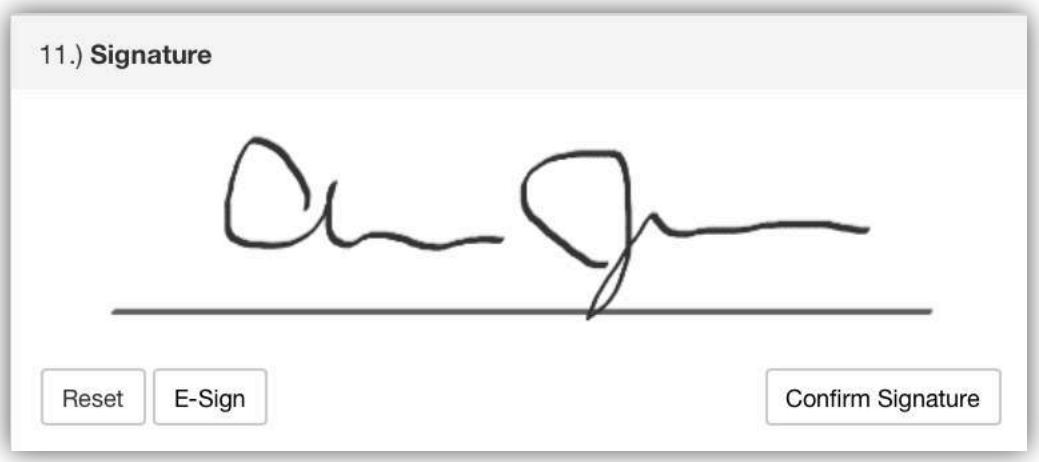
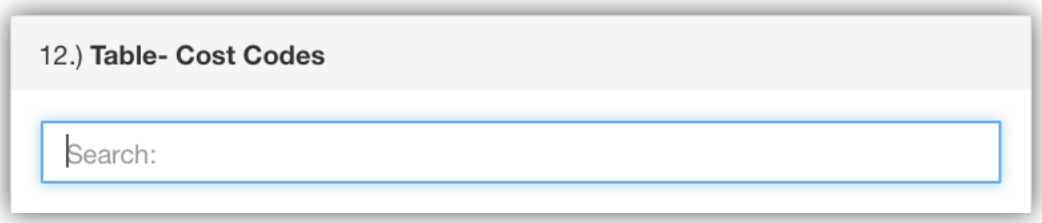
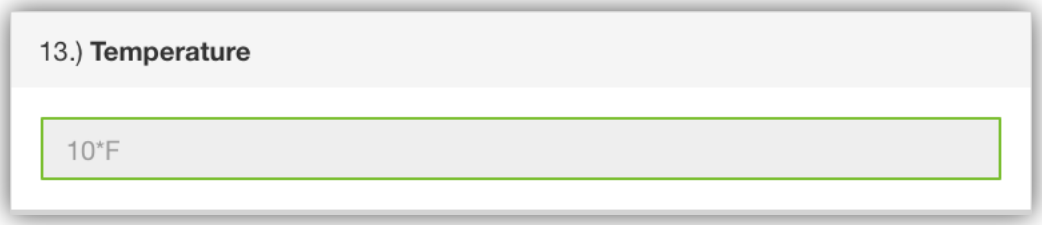


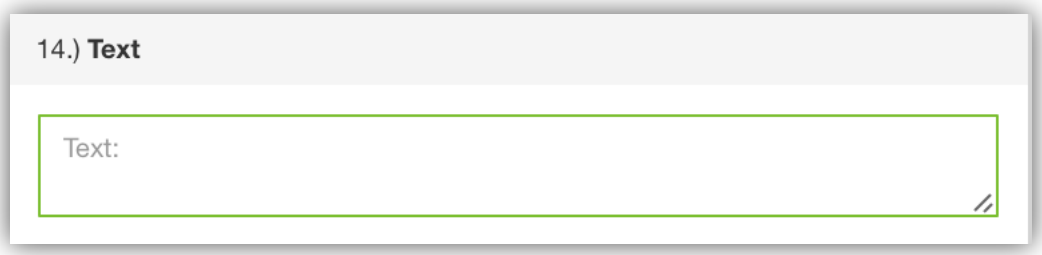

Table: Answer types derived from synchronization with ERP system.



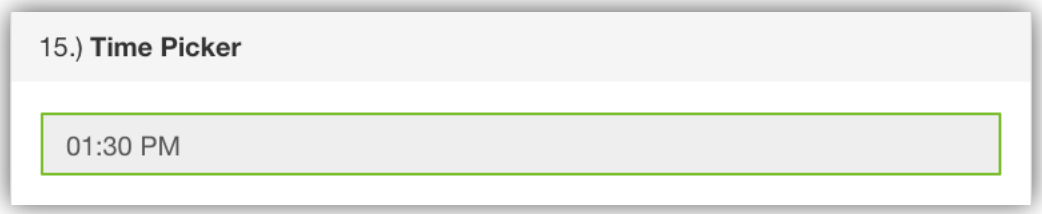

Temperature: allows user to input temperature to a form




Text: free textbox for basic input



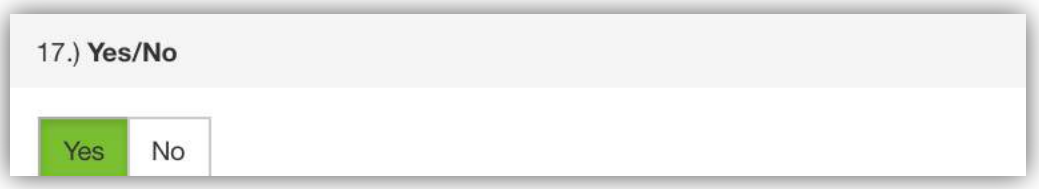

Time Picker: basic time input




Yes/No & Normal-Urgent-Critical (3 button): Assign a yes/no question and create issues off of the answer


16.) Yes/No & Normal-Urgent-Critical (3 button)
Yes
No
Normal
Urgent
Critical

Yes/No:


17.) Yes/No
Yes
No

## APPENDIX B: USER ROLES

There are general role specific to the total system for all users. There are applications specific roles that may not be used by each user.

Admin: Has the ability to do everything and see everything that any of the other roles can as well as the ability to add and edit the other users. *Admin Rol*e has the same abilities as the *TimeSheetSuperAdmin* with the exception that they do not see the *Reset* for *Edit* buttons.

ContactReadOnly: Has the ability to view the *Contacts Page* and *Menu Item*, however, cannot make any changes to the *Contact Menu*.

ContactWrite: Has the same abilities as the *ContactReadOnly* but with the additional ability to make changes, add and/or delete items in the *Contact menu*.

Document Admin: Has full rights to documents

Document Edit: Has ability to only edit documents

DocumentShareManage: Has the ability to assign security

Employee: Has the ability to view and use the *Public Menu Items* and the *Apps Menu Items*.

FormCategoryQuestionReadOnly: Has the ability to view *Form Category Questions* but not the ability to make changes to the *Form Category Questions* menu.

FormCategoryQuestionWrite*:* Has the same abilities as the *FormCategoryQuestionReadOnly* with the additional ability to make changes, add and/or delete items in the *Form Category Questions* menu.

FormsReadOnly: Has the ability to view forms but does not have the ability to change, add and/or delete any item in the *Forms* menu.

FormsSubmissionOverride: Has the ability to see the *Reset* for *Edit* button.

FormsWrite: Has the ability to view, edit, add and/or delete a *Form* or *Form Menu* item.

IssueReadOnly*:* Has the ability to view Issues but not the ability to change, add and/or delete any Issue in the *Issue* menu.

IssuesWrite: Has the same abilities as the *IssuesReadOnly* with the added ability to view, edit add and/or delete any Issue in the *Issue* menu.

JobsReadOnly: Has the ability to view *Jobs* but not the ability to change, add and/or delete a job.

JobsWrite: Has the same abilities as the *JobsReadOnly* with the added abilities to view, edit, add and/or delete a job.

Jobs User: Has the ability to have jobs assigned to that user.

Payroll Foreman: Have forms time sheets routed to them and enter/edit timesheets. Route to Foreman or Admin

Payroll Super: Has ability to create timesheets and crews, route timesheets to foremen. This role can only see their jobs. Remember to make sure they are a job user to only specify jobs.

Payroll Reports: Has the ability to generate P/R reports

Payroll Admin: Has full payroll functionality

Payroll Approver: Has ability to approve payroll timesheet. Selecting this adds an approve button.

TimeSheetAdmin: Has the ability to edit or remove any manager approved time entry for any employee, manage their own time entry as well as any other employee with the added ability to access the *Time Reporting* menu.

TimeSheetManager: Has the ability to edit and remove an employee *Time Entry*, add and approve an employee *Time Entry* with the added accessibility to *Time Reporting*.

TimeSheetSuperAdmin: Has access to *Time Reporting* with the ability to override, remove, edit and/or add any approved or unapproved *Time Entry*.

User: Has the ability to enter time only for his or her self and/or edit his or her time until approved.

User Management: Has the ability to view, edit and create any User in the *User* menu.

VendorsReadOnly*:* Has the ability to view the *Vendor Page* and *Menu Item* but cannot edit any vendor menu item in any way.

Vendor Write: Has the ability to view, edit, modify and/or add new vendor to the *Vendor* menu.

ViewAdminMenu: Has the ability to view the different options for the *Admin* menu.

## APPENDIX C: ROUTE RULES

Manage workflow through eNTERFACE routing. There are four methods of routing:

1. On-the-fly: User selects route group or individual before submitting form

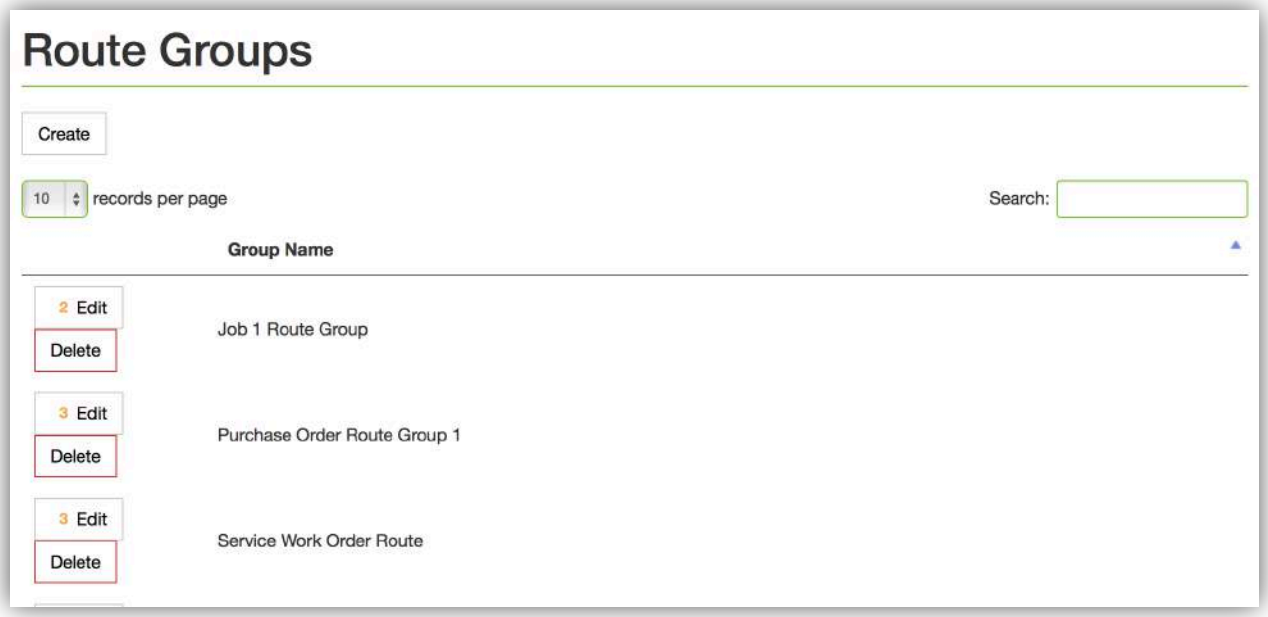
2. By User: User Forms (My Forms) can be setup that when a specific user completes a form it will route to the route group selected for that form and that user

3. By Job: Save as user but Job. Job forms will be setup that when a specific form assigned to a job is completed the route group for that form will be performed.

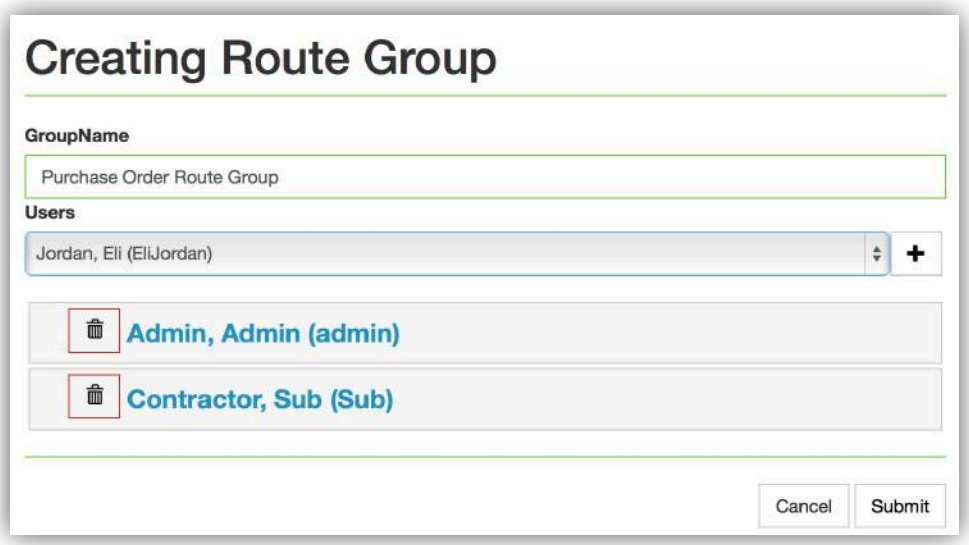
4. By Form: Setup during form design that not matter what the rule, if a this form has a route rule; it will use that rule upon submission of that form.

Notifications are sent with hyperlinking directly to forms en route. Processes can be built through combining the features of eNTERFACE Form Wizard and Routing.

To manage Route Groups, select the *Route Groups* tab beneath the *From Management* tab in the navigation bar. You will be directed to the following screen.




You can edit/delete/create Route Groups from this page. Select the *Create* button to create a rule that follows a specific workflow. Drag the users to the order the rule should follow.




You can rearrange the route group users by clicking and dragging the users into order.

## APPENDIX D: TOKENS

Tokens are created by the system and questions utilized in forms.  They are used for various features of the eNTERFACE system. They can be used for:

1. Report design placement of questions
2. Search functionality
3. Reference placement on forms
4. Custom formats of email and route distribution
5. Defining placement of forms in Documents folders and subfolders
6. Naming of Forms store in Documents or transferred to other applications

# APPENDIX E: REPORT BUILDER