eNTERFACE

TRAINING DOCUMENTATIONS & USER MANUAL

DOCUMENT OVERVIEW

This document is intended for training purposes for the **eNTERFACE Integrated Forms and Application System.**

This training documentation was created to help the user(s) navigate effortlessly throughout the system.

eNTERFACE Advantage

- Streamline mobile applications into one private and universal interface
- Set up mobile forms for automating internal processes
- Streamline communication between internal and external users
- Track and manage issues on the fly
- Enhance reporting and visibility from multiple applications
- Reduce cost of ownership of numerous apps
- Eliminate information silos from unconnected apps
- Leverage existing field devices

*What separates **eNTERFACE** from a standard portal platform is that **eNTERFACE** has the ability to be customized from an administrator level.*

BACKGROUND

eNTERFACE is the latest web technology bridging end users to corporate information and forms and can be customized from an administrator level. With this system administrators can quickly configure forms and deploy them out to the field in minutes.

e**NTERFACING** allows forms to automatically fit to any field device and relieves the issue and financial burden of trying to purchase enterprise hardware. In most cases **eNTERFACE** can leverage existing field technology regardless of platform device.

eNTERFACE allows companies to roll out technology without having to keep track of changes to operating systems or devices while offering the same look and feel of a normal app with the only requirements being an internet connection.

SYSTEM SETUP

Form Tool Management allows customers to set up unlimited forms for field and back office use. Through a series of questions a company can customize virtually any field or internal form and deploy in minutes.

eNTERFACE Issue Management allows issues to be added to any form. A field user can create an issue, take pictures, and document issues needing resolution allowing them to then be emailed or routed to both internal and external users where the issues are then managed until closed inside the issue tracker on the **eNTERFACE** home screen.

eNTERFACE Connector Management offers the ability to integrate **eNTERFACE** forms with existing application data, functions as a data replicator to continually monitor and poll data stored in various applications, enables validated look ups for jobs, employee and vendor Information as well as data importing which will eliminate data entry for back office personnel.

eNTERFACE Reports Management bridges employees and corporate information by offering the ability to create and publish SQL reports on the **eNTERFACE** home screen by merging data from multiple applications into one enterprise level view.

eNTERFACE Applications Management is designed to solve many manual processes within companies and can be purchased separately and added to a company's **eNTERFACE** system.

eNTERFACE Custom Programming offers custom programming for companies looking to create end to end solutions for corporate work processes inside their **eNTERFACE** system.

SYSTEM LOGIN

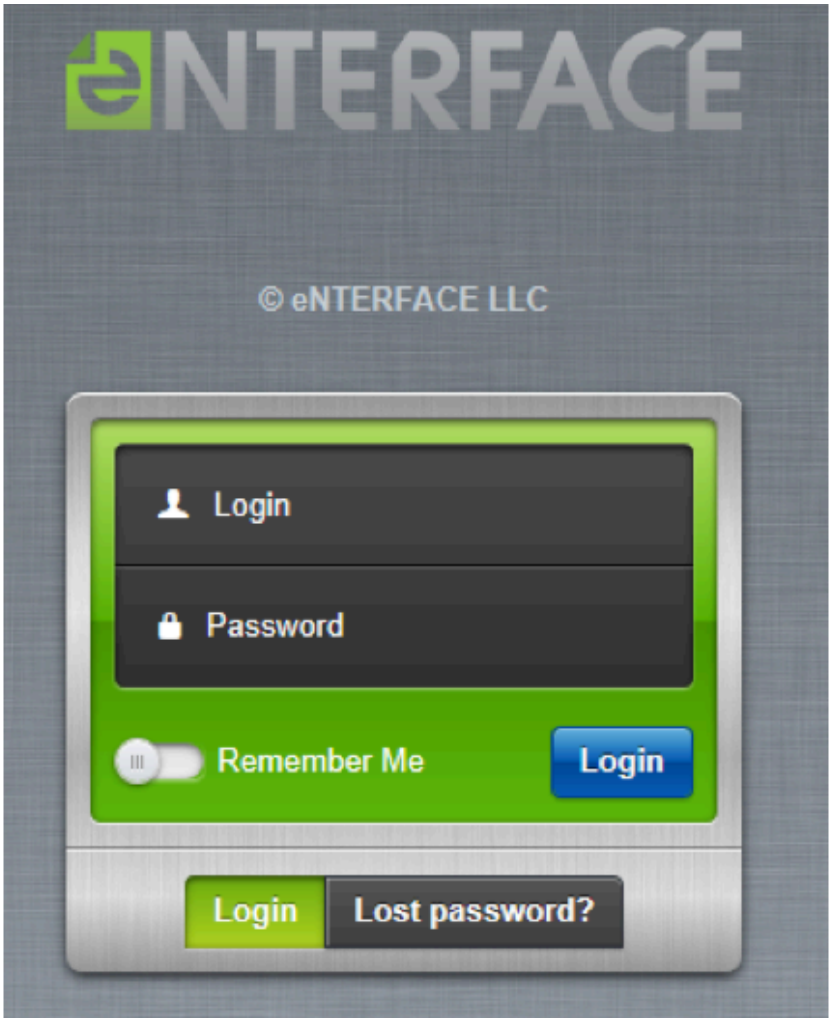
This system is designed so that users with certain specific roles can only access certain areas of the background management system.

Each user is assigned a user name, password and user role(s).

When you sign on to the system the following page will appear asking you to sign in using your protected user name and password.

After entering the user name and password you can choose the **Remember Me** button so that upon logging in the password will be remembered by the system. However, this is not a recommended practice if you are using a shared computer.

After completion of this process you will have created a new user password to be used when logging into the system.



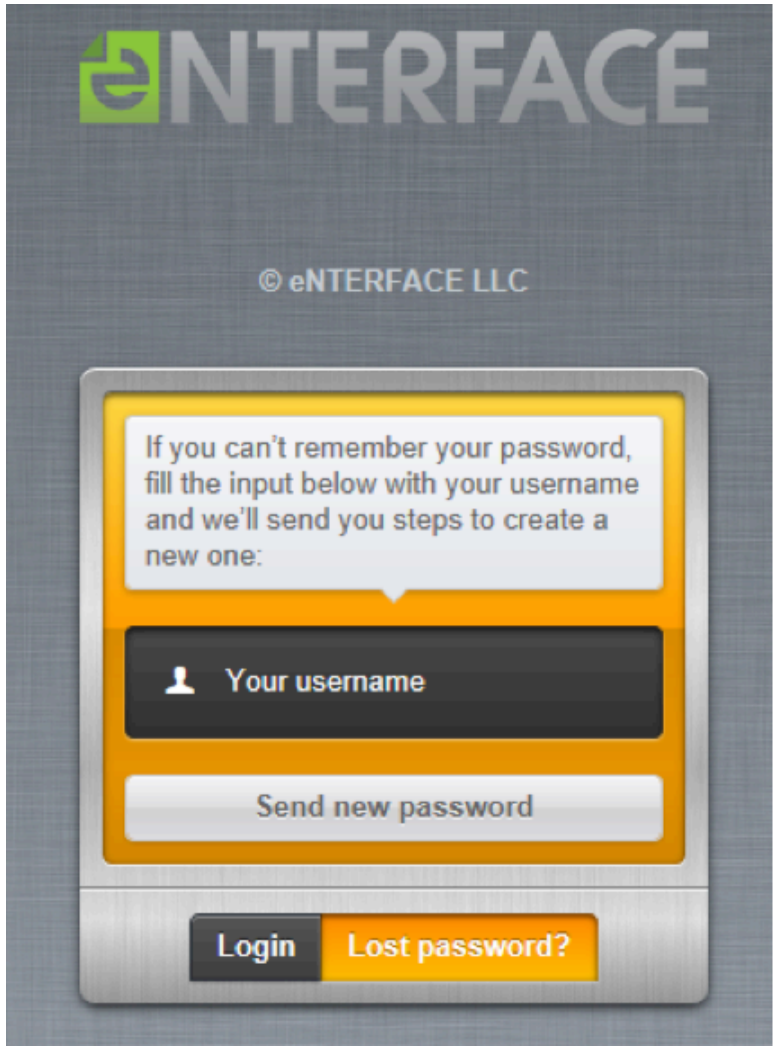
If you attempt to login with 5 or more failed attempts you will be locked out of the system.

You will then have to contact administration for a password reset.

If you have forgotten your password you can click on the **Lost Password** button and the system will help you create a new password.

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

After completion of this process you will have created a new user password to be used when logging into the system.



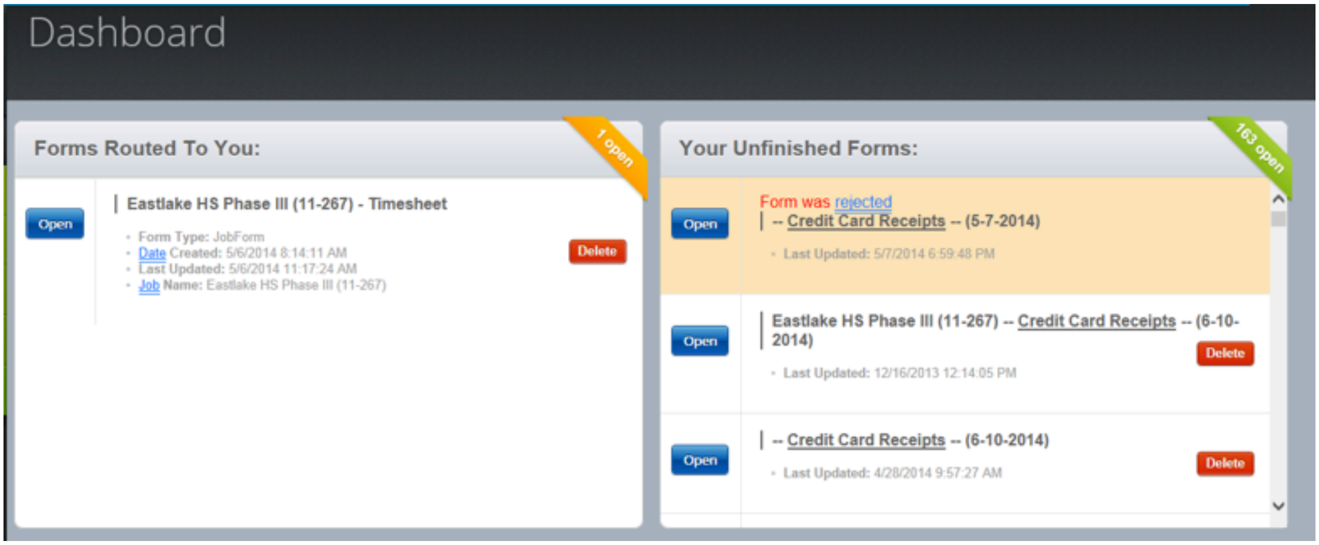
Upon logging into the system, you will be directed to the Dashboard

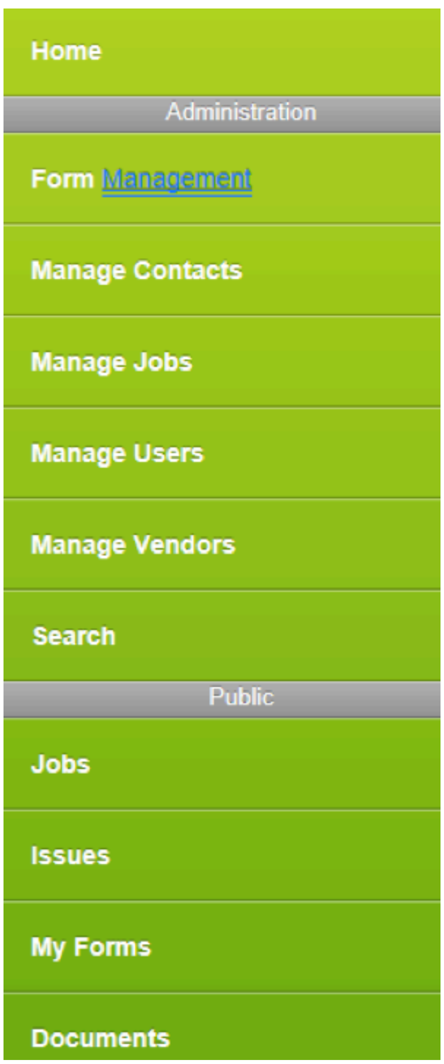
If there are any Forms Routed to You, Unfinished Forms, or Open Issues they will be shown on the opening Dashboard, as seen in the examples below.

There will be a blue message banner across the top of the opening page to let you be aware of that status.

The banner at the upper left corner of the Forms Routed to You, Your Unfinished Forms, and Your Open Issues screens will have a number of the forms or issues that are to be addressed.

At this point you can open or delete the forms as necessary by clicking on the selected action.





NAVIGATION

Friendly user tabs were designed to make navigating through the system easy.

The **Home** tab will direct you to the home page that you see upon signing into the system.

The menu items on the green menu bar to the left consist of administrative items such as Form Management, Manage Contacts, Manage Jobs, Manage Users, Manage Vendors and Search.

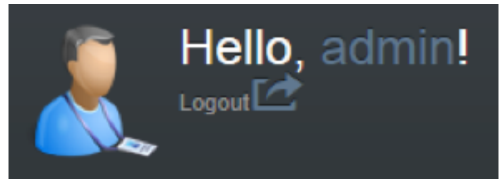
Only the user(s) with the Employee Role will be allowed to see and use the Public and Apps sections of the navigation pane.

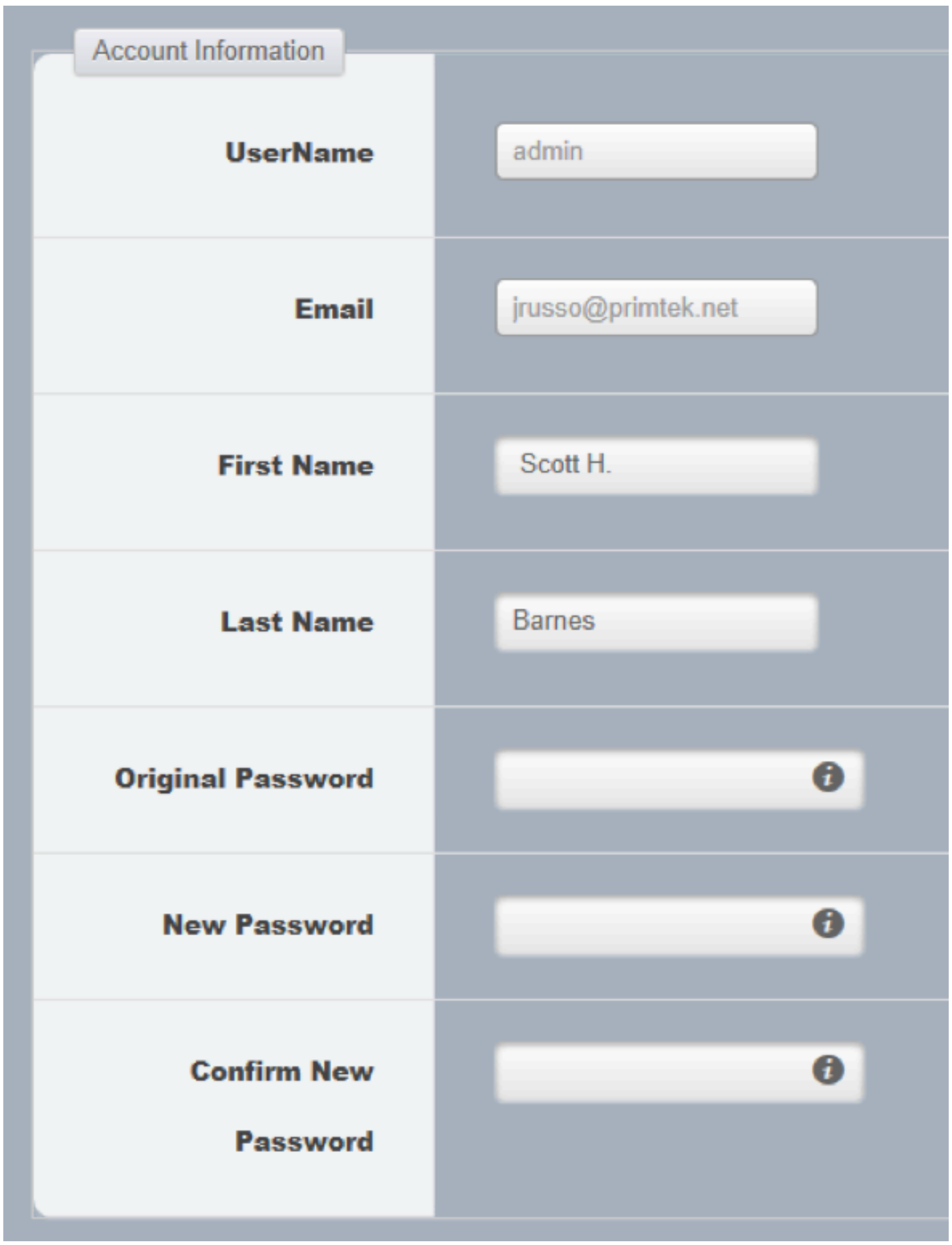
The Public section consists of Jobs, Issues, My Forms and Documents.

When activated, each tab will display a menu of functions to choose from.

EDITING ADMIN

By clicking on the person icon the administrative user will be allowed to **Edit** the logged in employee. The following screen will appear where you can edit any or all information pertaining to the logged in user as seen in the following example.

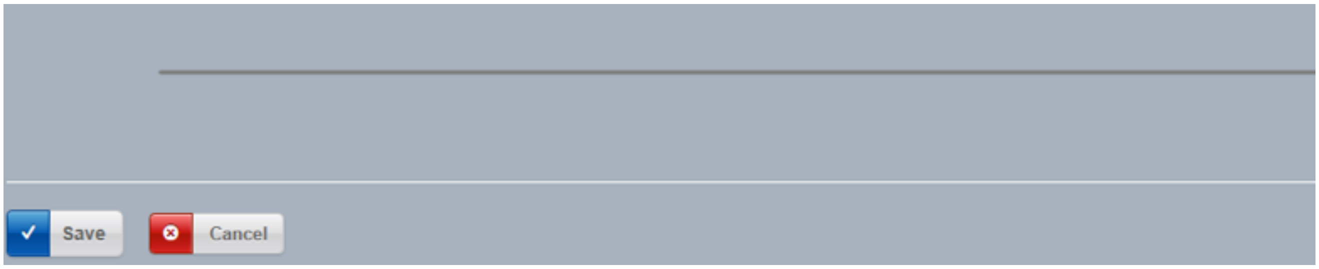




In the Site Settings section as seen in the example below, the Submitted Forms To Me button can be turned to the on or off position only by the user. ***Administration cannot modify this button.***

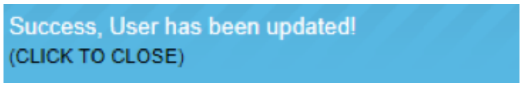
This feature allows you, the user, to choose whether or not you want to be cc'd on this form or not. It can be changed for every form.

Use the mouse to sign the form on the signature line. If you wish to clear your signature and try again you can do this by clicking the **Clear** button. Your previous attempt will be cleared so that you can resign the form.



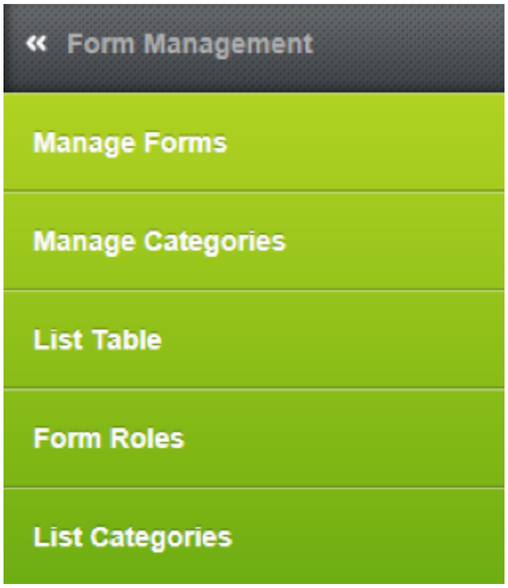
If any changes have been made, click on the **Save** button and the changes will be saved into the system. Click on the **Cance**l button if there are no changes to be made. You will then be directed back to the Home dashboard.

There will be a fading blue bar at the top right of the page with the message that the user has been successfully updated.



ADMINISTRATIVE

When you click on the white arrow to the left of the Form Management bar you will be given the following menu options.



When you click on the white arrow to the left of the Form Management bar you will be given these menu options.

When you click on the white arrow to the left of the Form Management bar you will be given the following menu options.

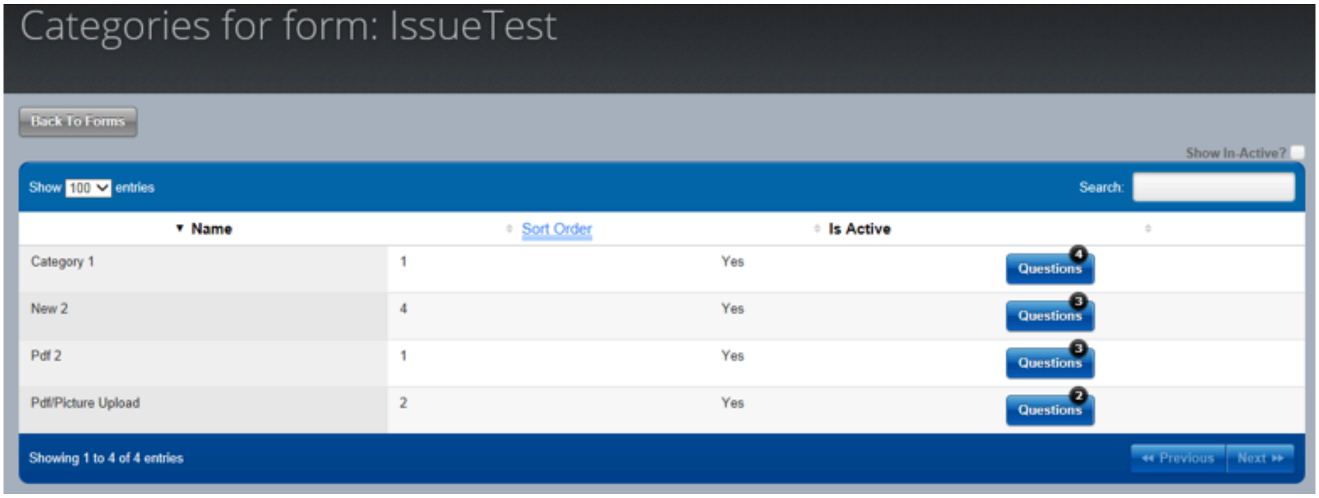
Clicking on the **Manage Forms** button will bring you to the **All Forms** screen as seen in the example below.

Manage Forms

In the following pages there will be examples to aide with creating new forms, editing forms, and viewing the categories for the forms.

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

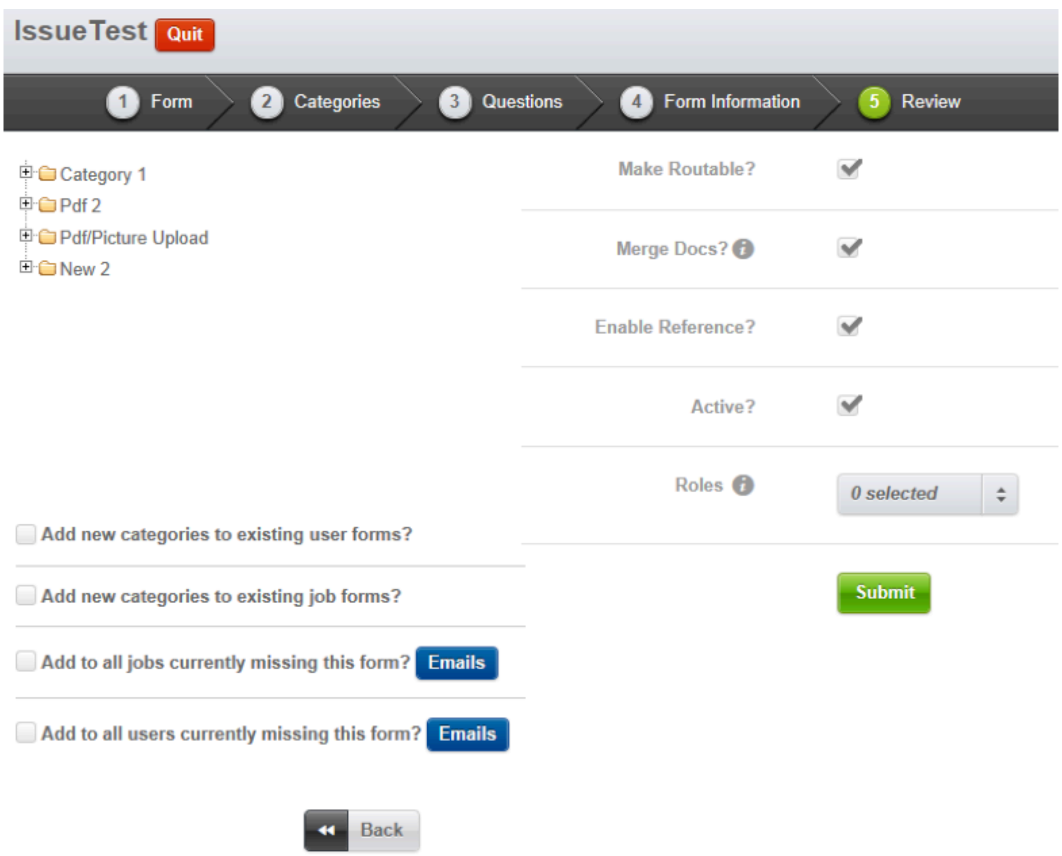
If there is no edit button beside the form this means that the form can not be edited.



If you choose to edit a form click on the yellow **Edit** button to the left of the form the you wish to edit.

You will then be directed to the following screen where you can edit the information.

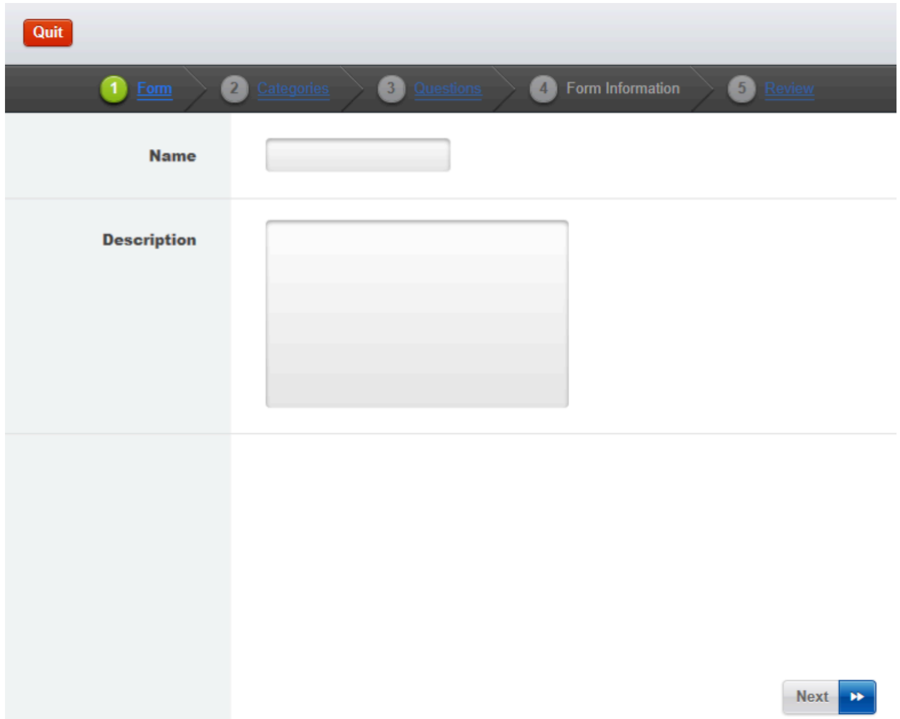
After the information is edited click on the green **Submit** button.



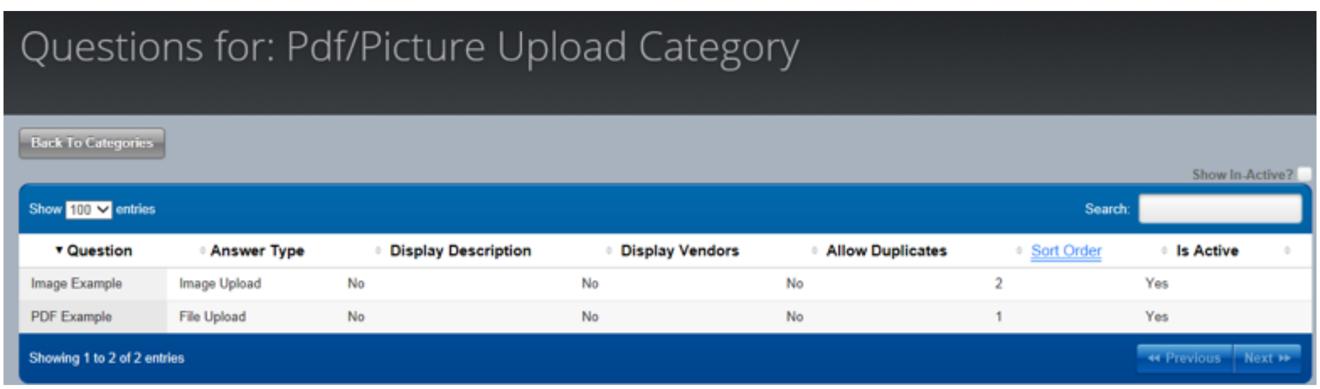
Click on the blue **Category** button beside the form selected. You will then be directed to the following screen where you will be able to view the questions associated with the form.

To do this click on the blue **Questions** button to the left of the form name.

<u>The number in the small black circle is the number of questions that are associated with that particular form category.</u>



You will then be directed to the following screen where the questions will be listed.



A new form can be created by clicking on the green **Create New** button at the upper left hand corner.

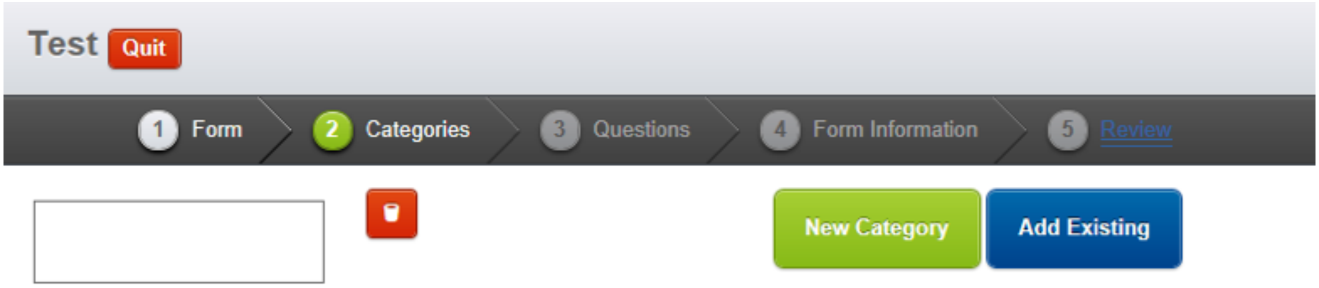
You will then be directed to the following screen.

Follow the prompts on the screen to enter the information needed.

Enter in the name and decsciption of the form you wish to create.

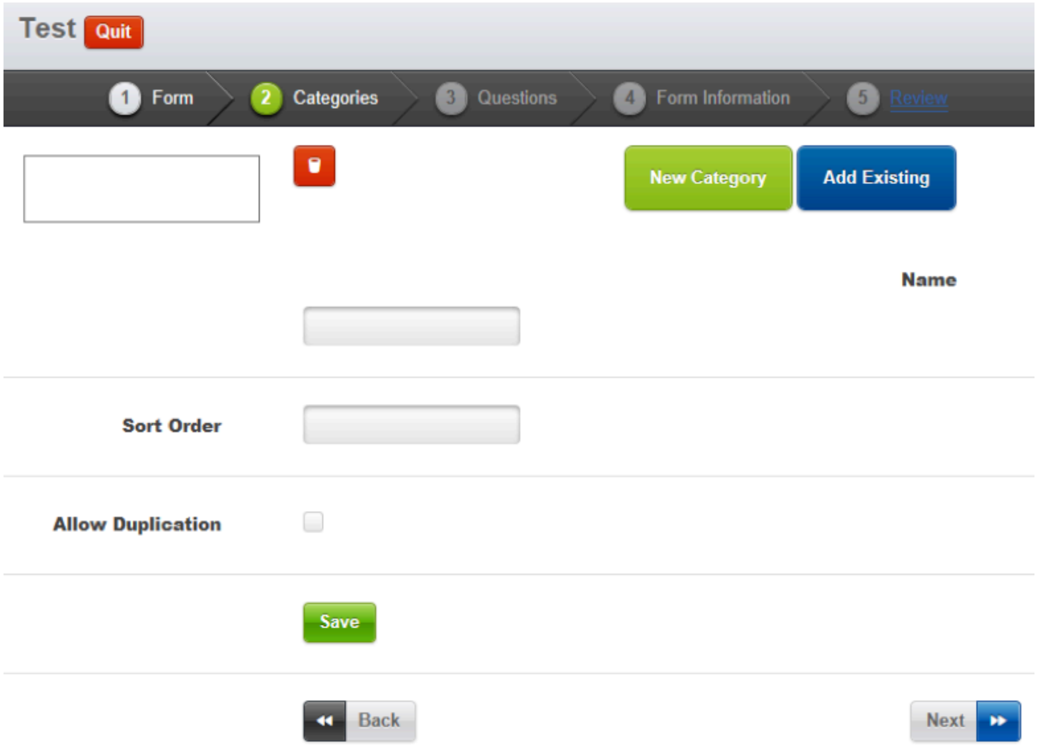
Click on the **Next** button at the lower left bottom.

You will then be directed to the following screen.

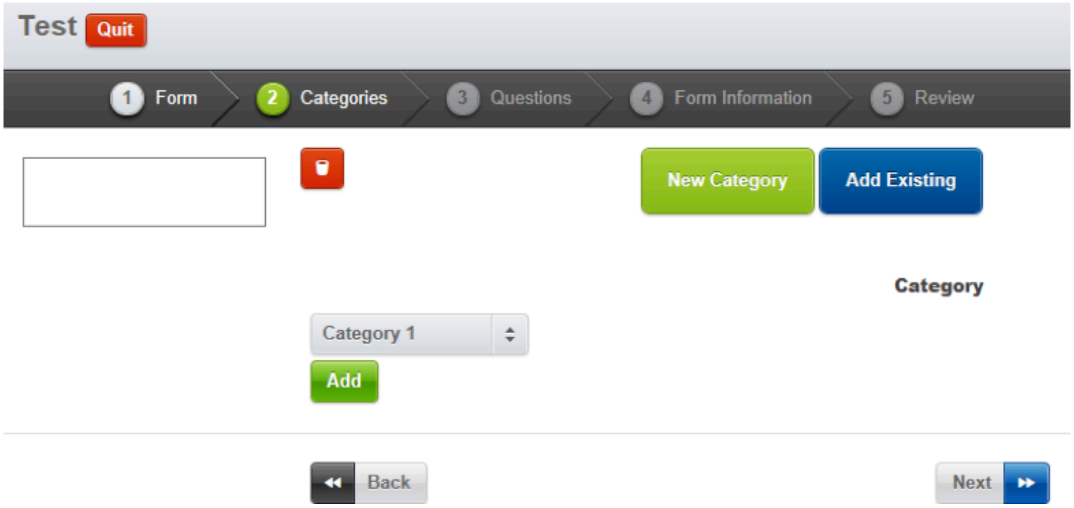


If you click on the green **New Category** button you will be directed to the following where you can enter the information in the spaces provided.

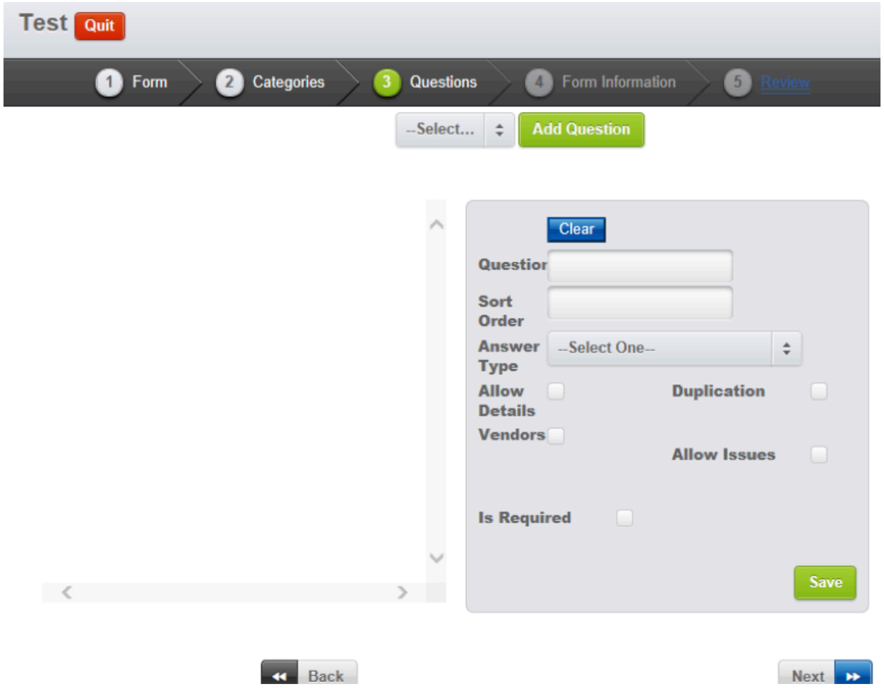
Click **Save** to save that information into the system.



Click on the blue **Add Existing** button to be directed to the following screen.



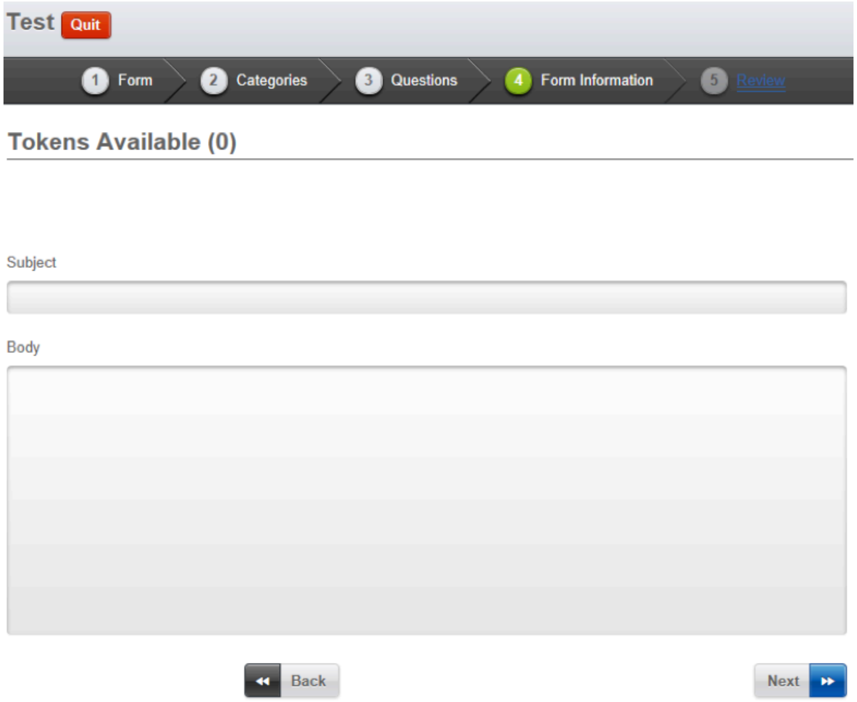
Click on the **Next** button to be directed to the next step in the process which will be the Questions, as seen in the following example.



When you have entered the information into the spaces provided click on the **Save** button to save the information into the system.

Click on the **Next** button at the bottom of the screen and you will be routed to the following screen where you can view the Form Information.

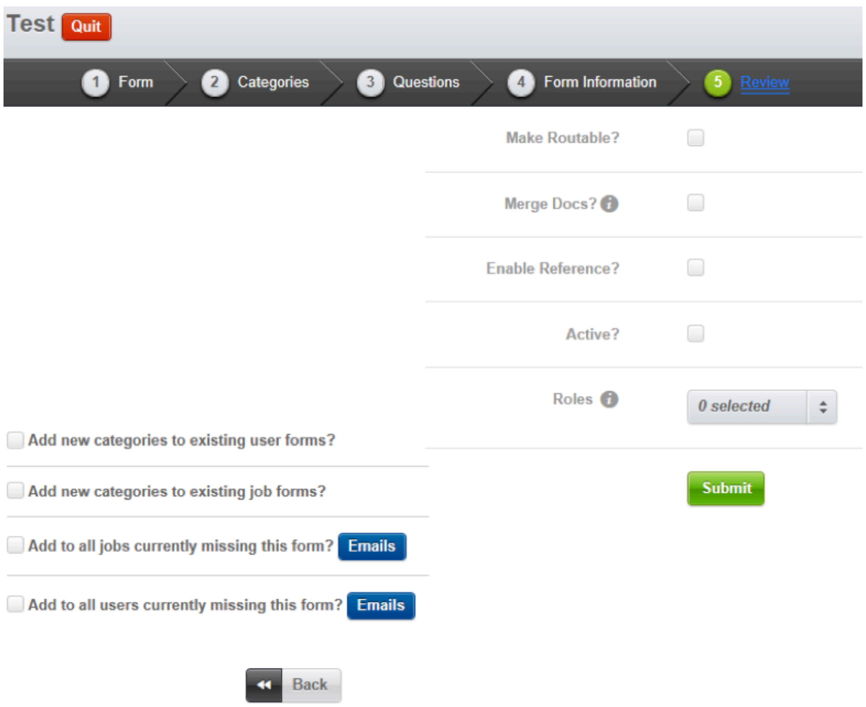
Click on the **Next** button at the bottom of the page to be directed to the following screen.



This is the final stage of the **Create New** option.

In this screen you can review all of the information you have entered pertaining to your new form.

Click on the green **Submit** button to submit the new form into the system. The following vanishing message will appear in the upper left hand corner of your screen.



Here you can select features for the form.

Be sure to select the active box in order to make the form discoverable

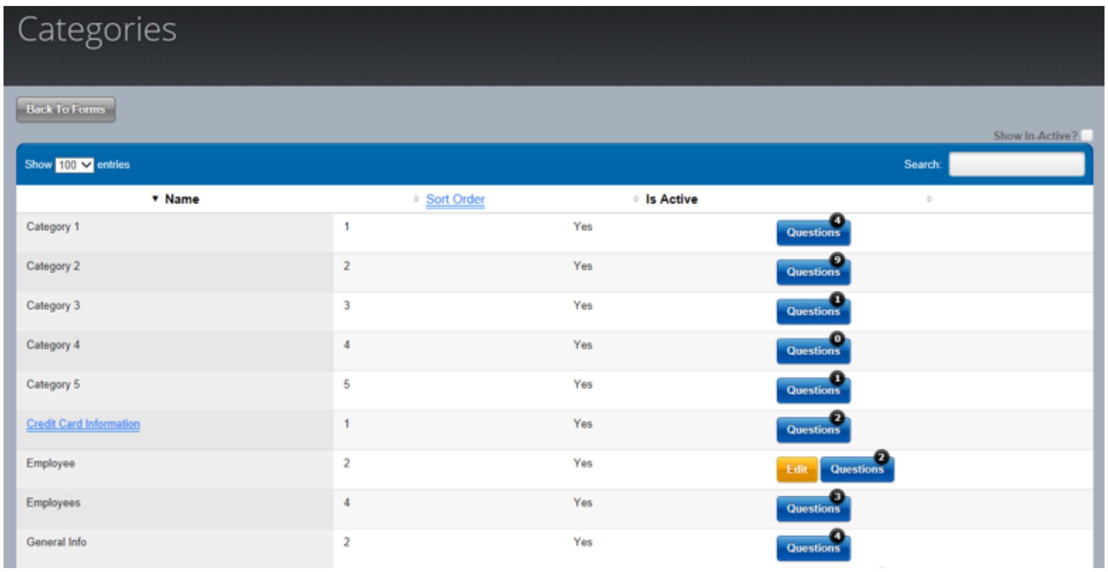
The features to the left of the screen are for editing previously created forms. Emails pertaining to updated forms can be sent directly from this page.

This box at the upper left hand corner of the page lets you know that your form has been successfully submitted into the system.

Manage Categories

The categories are listed by Name, Sort Order and Active Statue with the option to edit and/ or view questions for an existing category.

As in previous examples, if there is no edit button beside the category it can not be edited by the user.

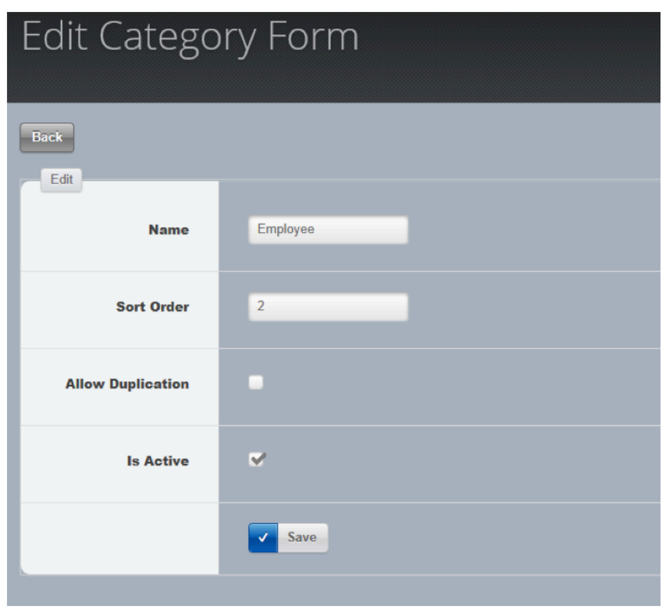


Click on the **Edit** buitton to the left of the category that needs to be edited. You will then be directed to the following screen where the category form can be edited.

When all of the information is entered, click on the **Save** button at the bottom of the screen. The updated information will now be saved into the system.

Click on the **Questions** button to be directed to screen where you can view all the questions associated with the particular category.

Click on the **Back To Forms** button at the top of the Category Form screen to go back to the All Forms page.

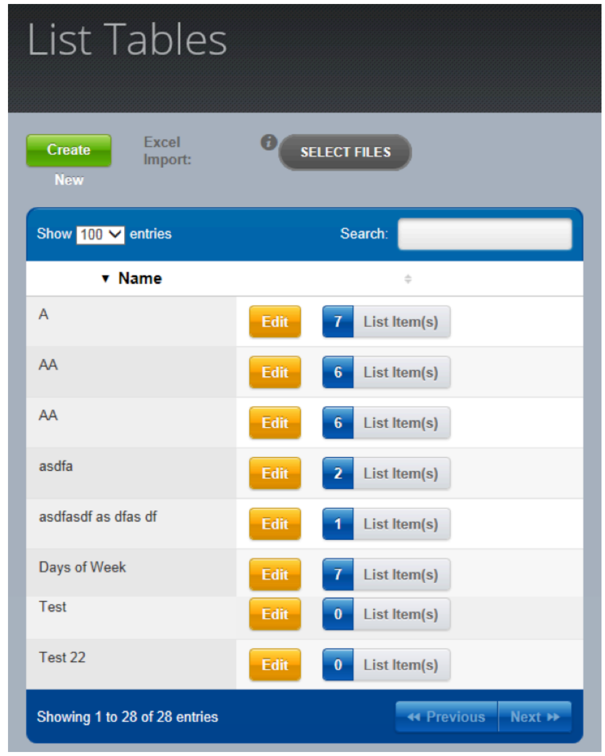


List Table

The List table consists of the name of category form with the option to create a new list table, edit an existing one, and add selected files to the form.

To the right of the form will be a number of items associated with the category form.

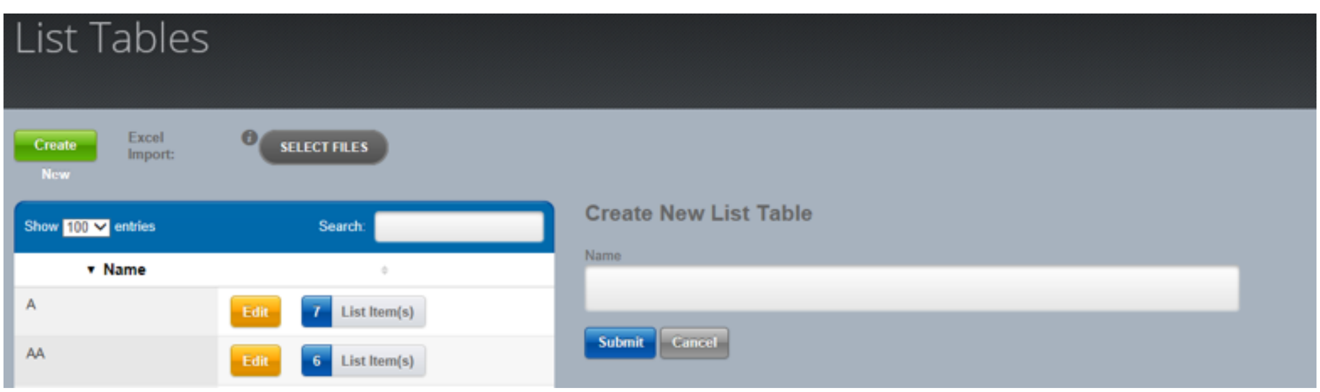
To create a new List table click on the green Create button. The following screen will appear to the right of the List table categories as seen in the example below.



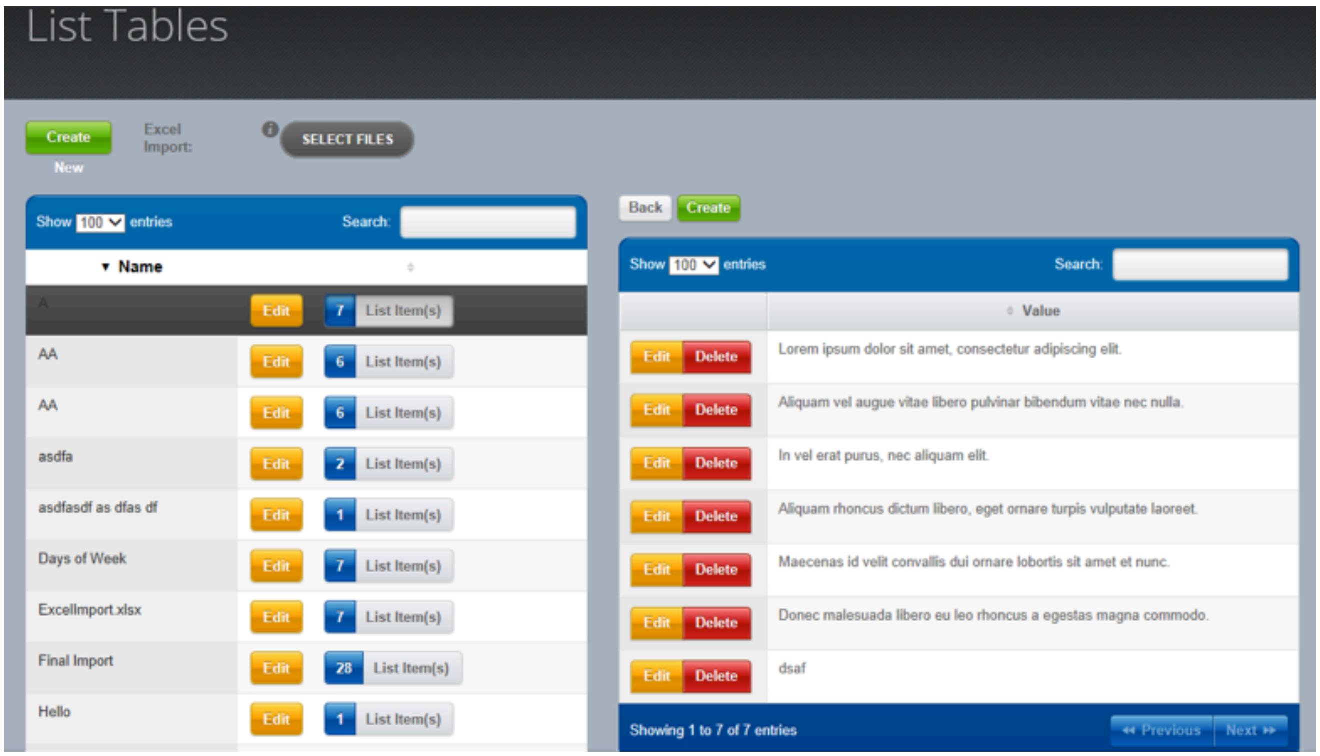
Enter the name of the new List Table in the space provided. Click on theblue **Submit** button.

If you click on the **Cancel** button, the Create New List Table screen will dissappear from the side.

Click on the **Select Files** button to extract files from another location on your computer to add to the form.



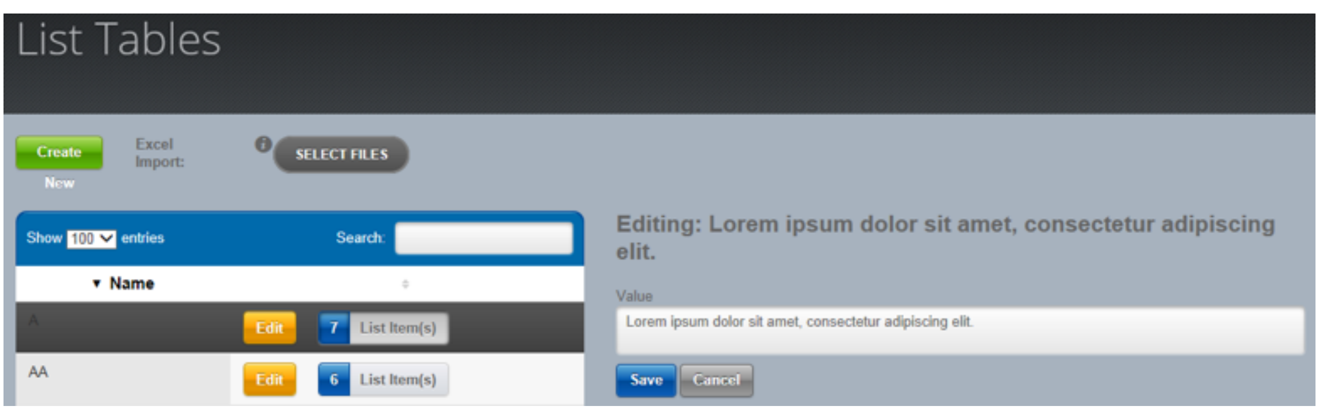
Click on the **List Item(s)** button the screen will appear as follows to allow you to view the list items associated with the file.



Here you can **Edit** or **Delete** selected files by clicking on the selected task button and following the prompts.

The Edit selection will allow you to edit the selected item.

Click on the **Save** button to save the updated information into the system



Click on the **Cancel** button and you will be directed to the previous screen.

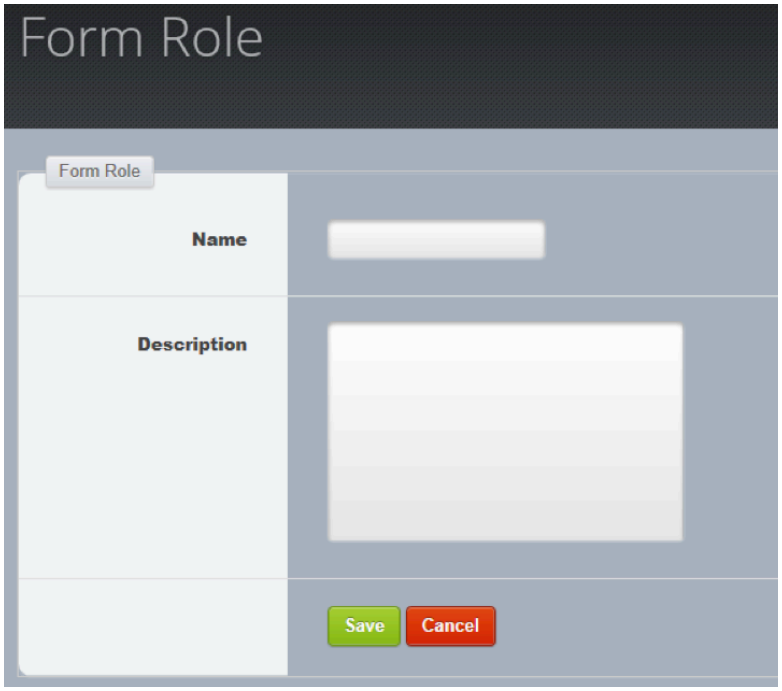
If you click on the red **Delete** button the following screenshot will appear asking if you are sure you want to delete the item.

If you hit **Confirm**, the item will be deleted from the system.

If you do not want to delete at this time click on the **Cancel** button and you will be directed back to the prior screen.

Form Roles

Form Roles are listed by Name and Description with the option to Create a New Form Role, and/or Edit an existing one.



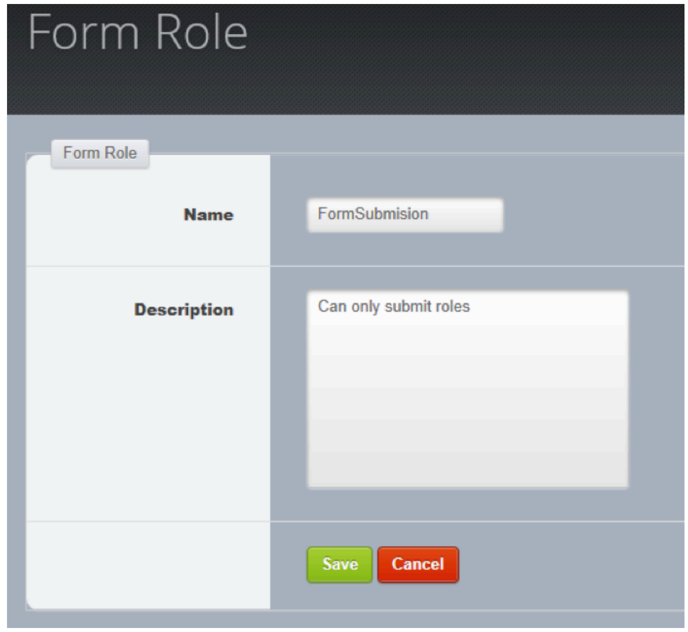
Click on the **Create** button and you will be directed to the following screen.

Enter the information and click on the **Save** button to save the new information into the system.

If you don't want to save the information you entered click on the **Cancel** button to be directed back to the previous screen.

Click on the **Edit** button if you choose to edit an existing Form Role. You will then be directed to the following screen.

After you have entered the information in the spaces provided click on the **Save** button at the bottom of the page to update the new information into the system.

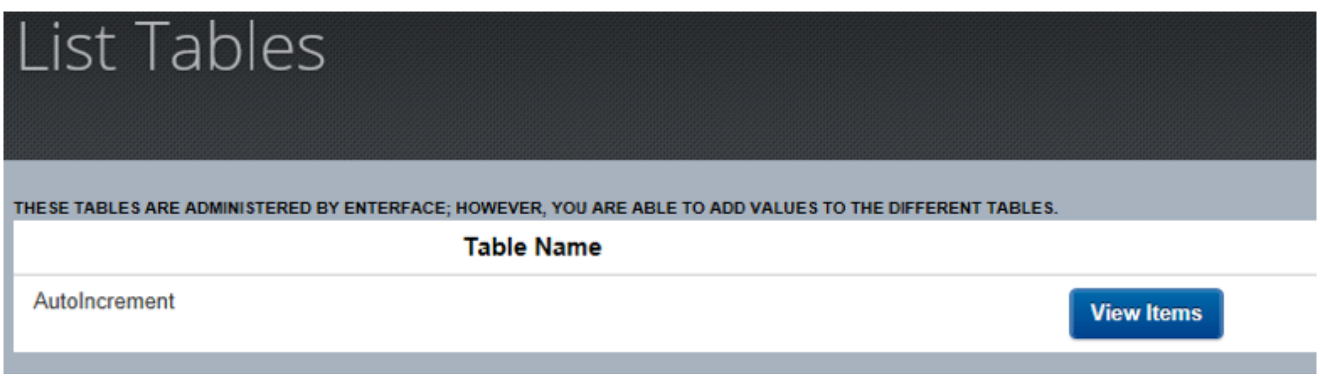


The following message will appear to let you know that the information has been successfully entered.

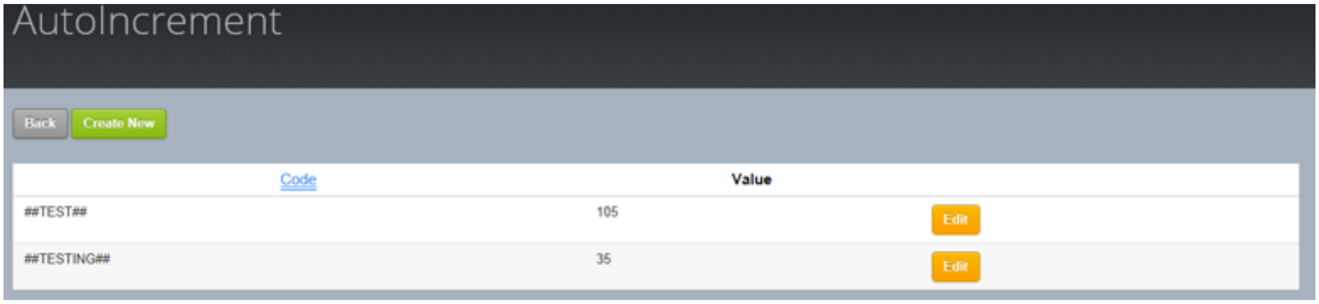
If you have entered the information in error and wish to go back, click on the **Cancel** button.

List Categories

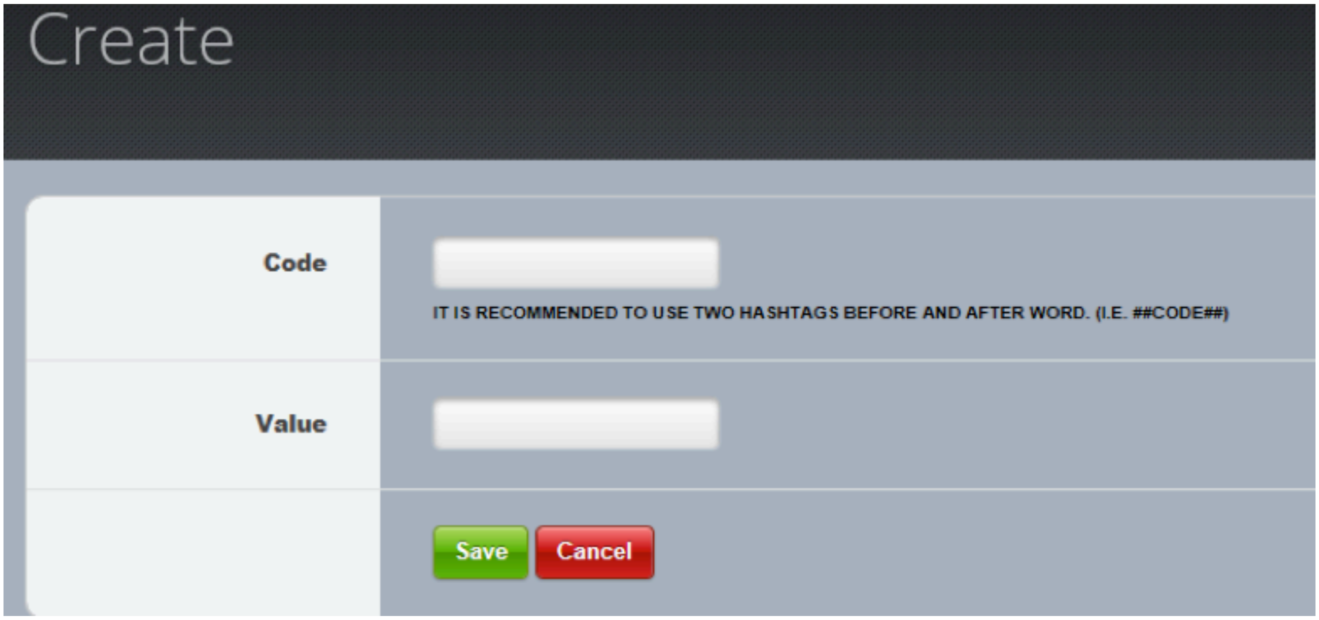
Categories are listed in the List Table by the Table Name with the option to View the Items associated with the category.



Click on the **View Items** button to see the items that are listed for that category. You will then be directed to the following page.



To create a new list category click on the green **Create New** button at the top of the screen. You then will be directed to the following.

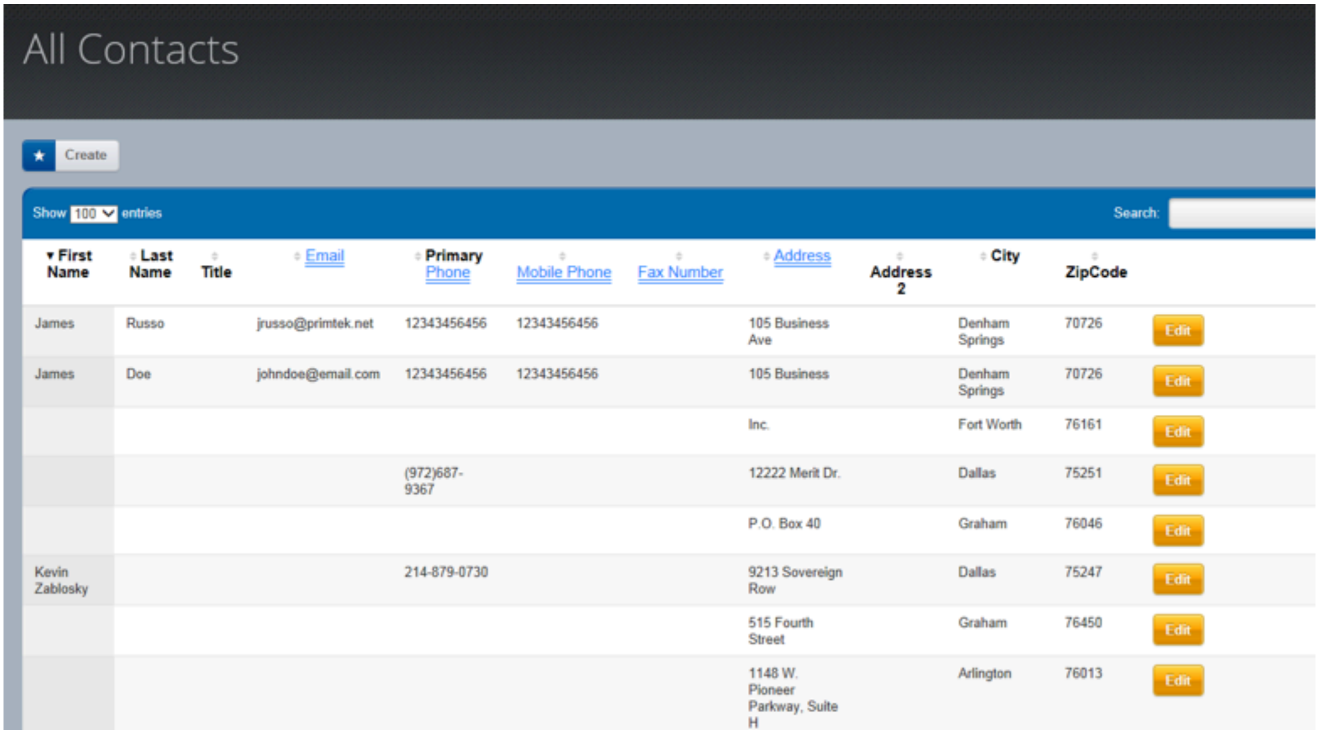


<u>It is recommended to use two hash tags before and after the code word.</u>

After entering the information in the spaces provided click on the green **Save** button.

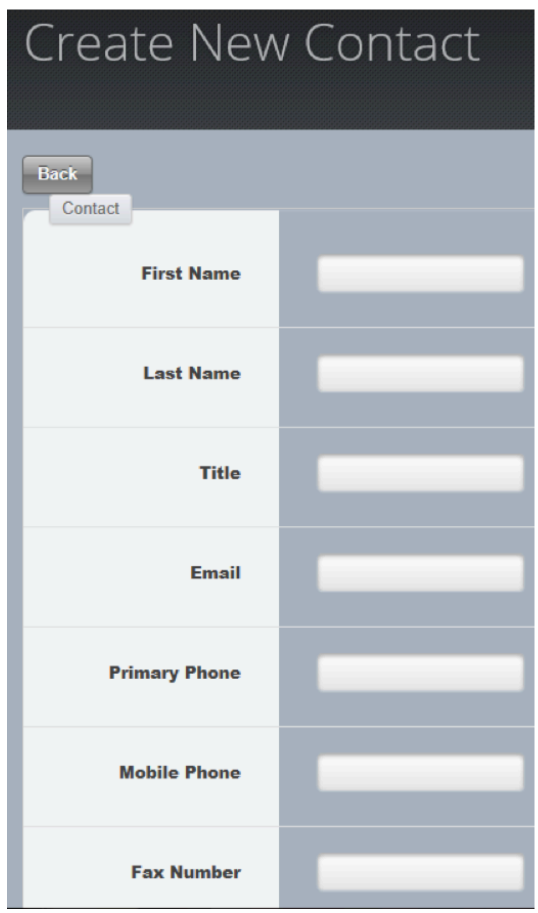
There will be a blue fading message, as seen below, to let you know that the information was successfully submitted into the system.

Click on the **Edit** button and you will be directed to the following screen where you can update the information as needed.



When you have updated the information, click on the **Save** button and the updated information will be saved into the system.

If you have entered the information in error or don't wish to continue with editing click on the **Cancel** button and you will be returned to the List Table screen.



MANAGE CONTACTS

Click on the **Manage Contacts** menu bar to be directed to the All Contacts page where you can view, create, and/or edit all contacts.

Contacts are listed by first name, last name, title, email address, primary phone, mobile phone, fax number, address, city and zip code.

Previous and **Next** buttons that are located at the bottom right of the page are designed to help the user navigate through the contacts in an easier yet efficient manner.

If there are more contacts when you get to the end of the page the **Next** button will be highlighted. If there are no more contacts the **Previous** button will be highlighted.

This can also be done by entering the name of contact in the Search bar at the upper right.

A new contact can be created by clicking on the **Create** button in the grey area beside the blue star at the top left of the page. You will then be directed to the following screen.

Enter all of the information into the spaces provided and click on the **Save** button.

The contact will now be saved into the system.

If you have entered the information in error or wish to discontinue creating a new contact at this point, click on the **Cancel** button.

You will then be directed back to the All Contacts page.

Click on the orange **Edit** button to the far right of the contact you want to edit.

You will then be directed to the Editing page.

When you have edited all the information needed click on the **Save** button at the bottom of the page and the information will be saved into the system.

MANAGE JOBS

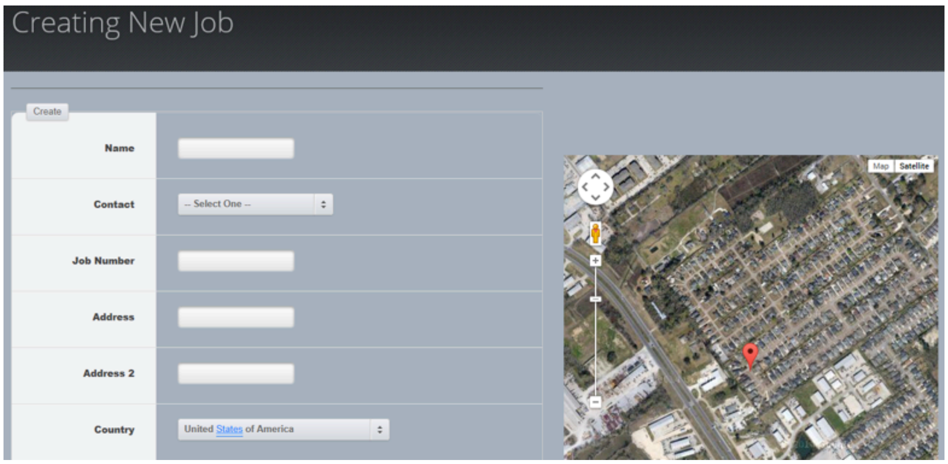
When you click on the **Manage Jobs** menu bar you will be directed to the following page which lists **ALL JOBS.**

All jobs are listed here by name, job number, address, primary phone number and the active status of the job.

You will have the option to create a new job by clicking on the **Create** button at the top of the page.

You will then be directed to the following page.

As seen in the example below, a Google Map will appear to the right which will allow you to see the location of the job.



This location will also be listed by longitude and latitude.

When all information is entered correctly, click the **Save** button to save this job into the system.

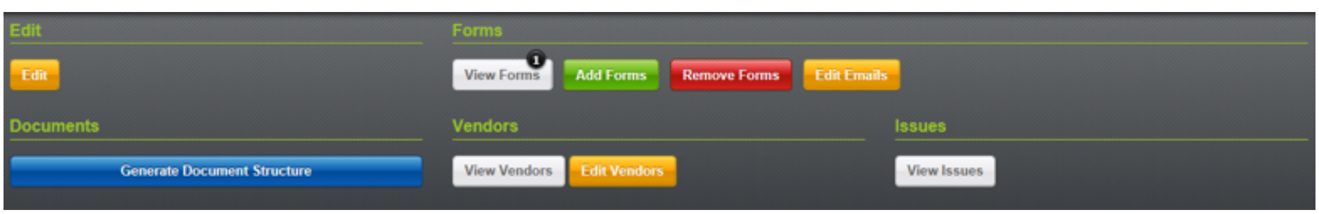
If the information entered is not correct or you do not wish to save it at this time, click on the **Cancel** button.

Hold the cursor over a selected job and left click.

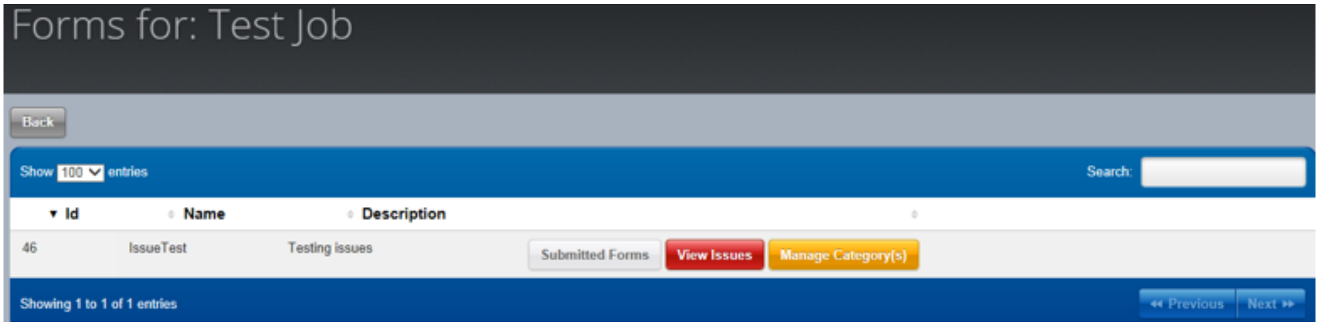
You will now be directed to the following screen where you will be given the option to Edit the job, view forms, add forms, remove forms, edit forms, view vendors, edit vendors and/or view issues pertaining to the selected job.

Editing Jobs

Below is the Job editing menu.



Click on the orange **Edit** button if you choose to edit the particular job.



You will then be directed to the following screen.

Enter all the information that you need to change or update in the spaces provided.

There is an **Is Active** button at the bottom left of the screen. This button can be moved using your mouse to the On/Off position.

After you have entered the information click on the **Save** button at the bottom of the screen to save the updated information into the system.

You will then be directed back to the All Jobs page.

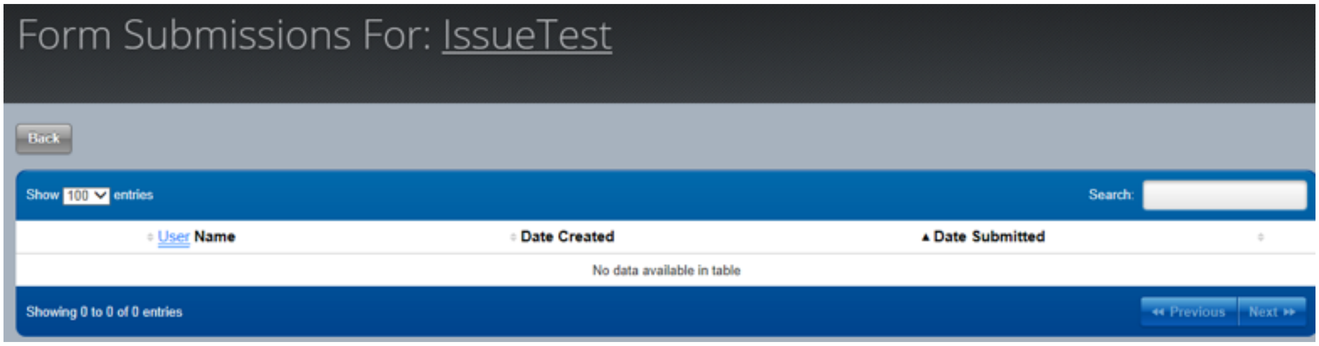
Forms for Specific Jobs

Click on the **View Forms** button to view the forms associated with that particular job. You will then be directed to the following screen.

The number in the small black circle lets you know how many forms are associated with that job. If there is no number that means there will be no form.

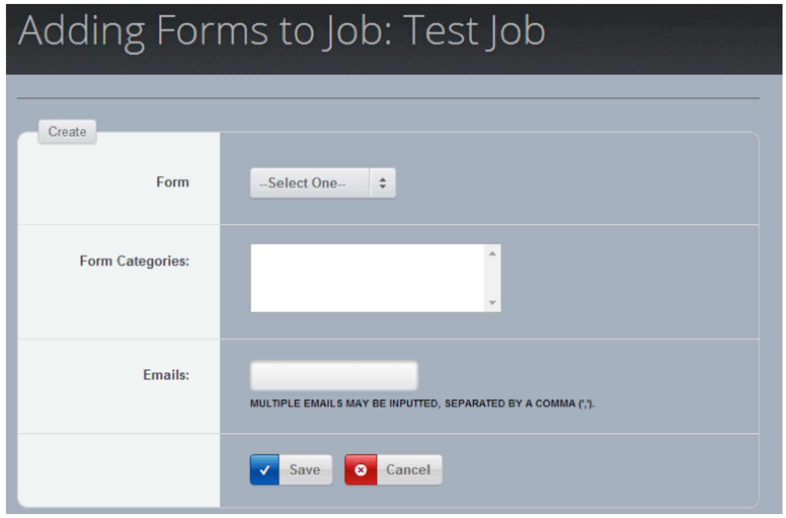
In this screen you can view the Submitted Forms, View issues and/or Manage Category(s).

Click on the white **Submitted Forms** button and you will be directed to the following page where you will see all the form submissions that are associated with this particular job.



If there are no forms submitted there will have “No Data Available in Table” on the bottom .

If there are forms submitted there will be a blue Show Answers button to the right of the User name with the PDF file available to view



Click on the green **Add Forms** button to add forms to a job. You will then be directed to the following screen.

Enter the information in the spaces provided.

In the emails area you can enter the email recipient(s) that need to have this information pertaining to this job.

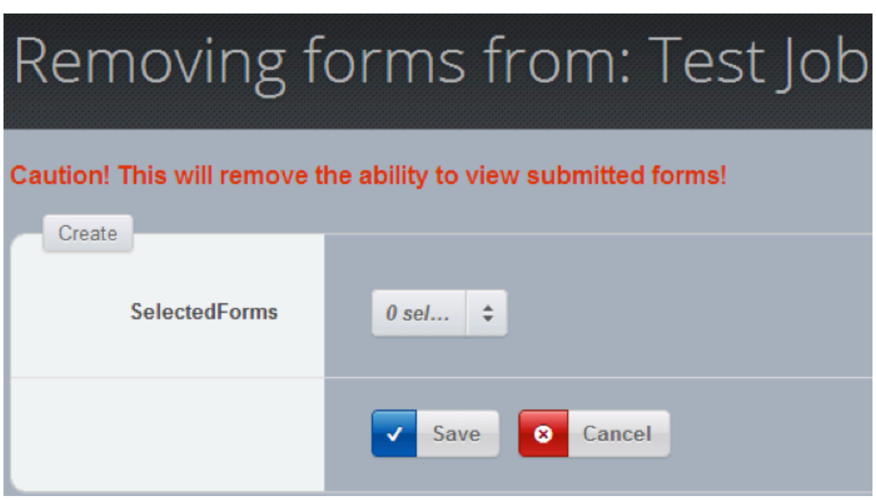
If you are entering multiple email addresses make sure they are separated by a comma.

Click on the **Save** button at the bottom of the page and the information will be submitted into the system.

If you have entered information in error, or choose not to enter the information at this time, click on the **Cancel** button.

You will then be directed back to the All Jobs page. If you choose to remove a form from the job click on the red **Remove Forms** button. You will then be directed to the following page.

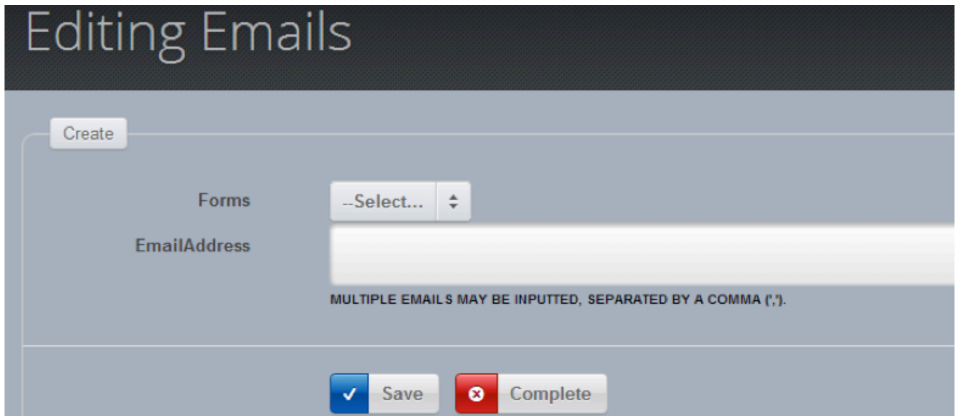
Use the drop down bar to the right of the selected field to select the form that you wish to delete from the job.



Once the form is selected and you are sure this is the form that you wish to remove click on the **Save** button and the form will be removed from the job.

If you are not sure that you want to remove this form click on the **Cancel** button.

Remember: *Once you remove the form you will no longer have the ability to view this form.*



Click on the orange **Edit Email** button if you need only to edit an email.

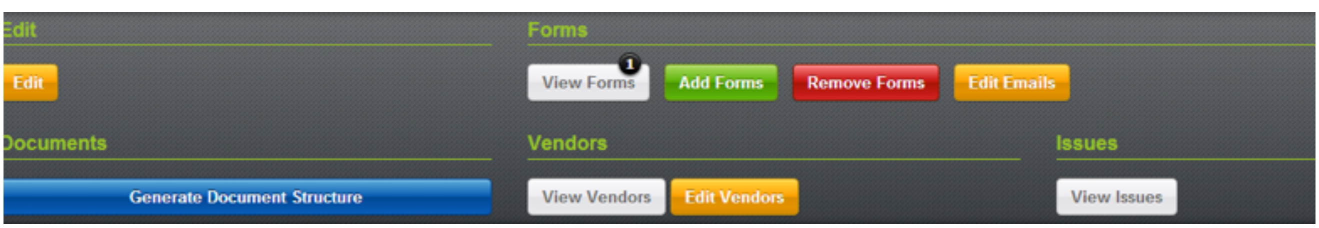
You will then be directed to the following screen.

Select the form by using the drop down bar to the right of the Forms field. Enter the email address(s) that should be associated with this form in the Email Address field.

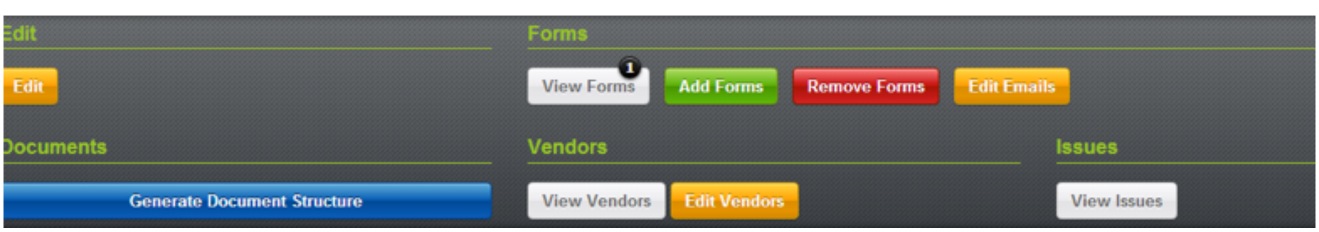
Click on the **Save** button to submit the information into the system. When finished, click on the **Complete** button. You will then be directed to the All Systems User page.

Documents

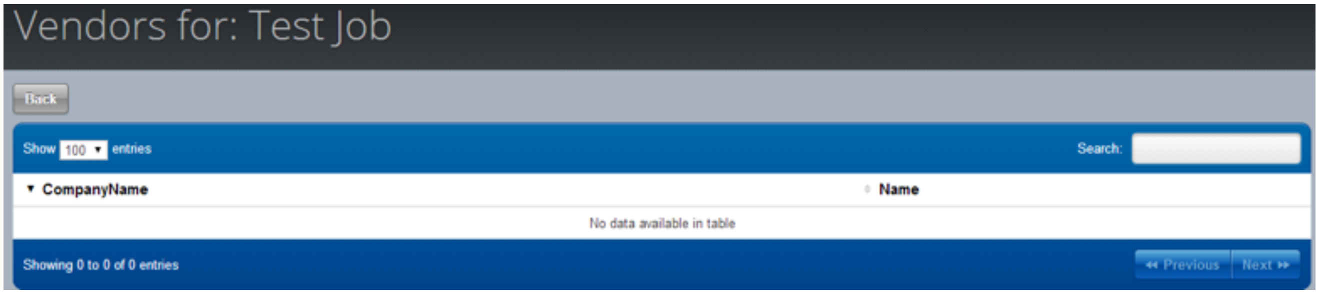
Click on the **Generate Document Structure** button to generate a document structure for the form.



Vendors



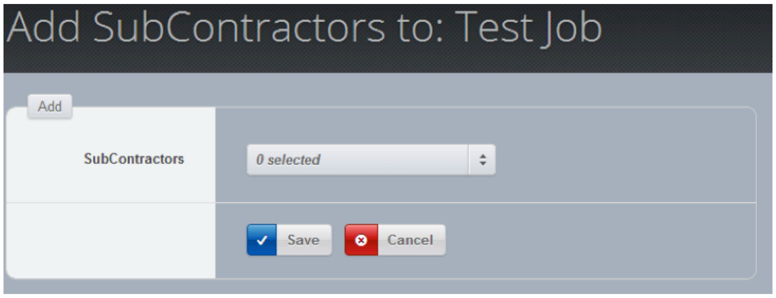
Click on the **View Vendors** button and you will be directed to the following screen where all the vendors associated to this job are listed by company name and contact name as seen in the following example.



To edit a vendor, click on the **Edit Vendors** button.

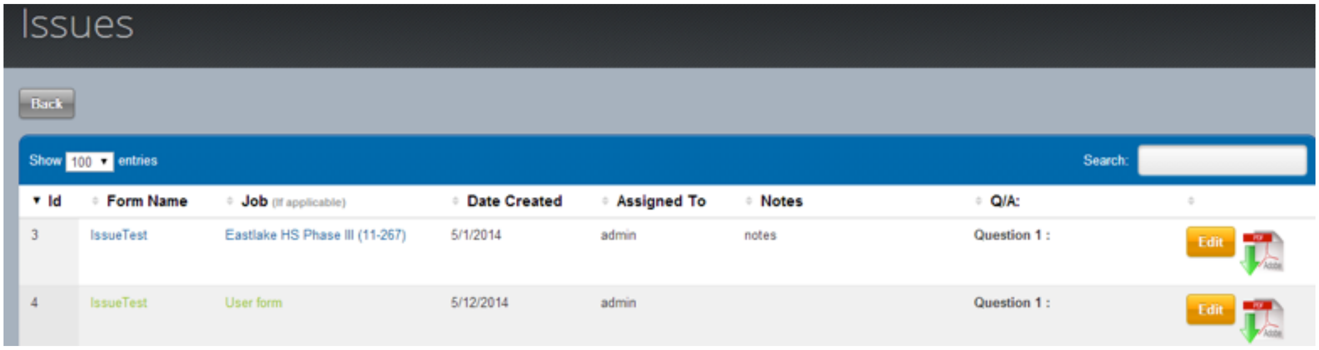
You will then be directed to the following screen where the subcontractor can be edited by using the drop down bar to the right of the contractor field to choose the subcontractor that you want to add to the job.

When the subcontractor is added successfully there will be a blue fading message in the upper right hand corner of the screen to let you know that the vendor has been successfully added.



Issues

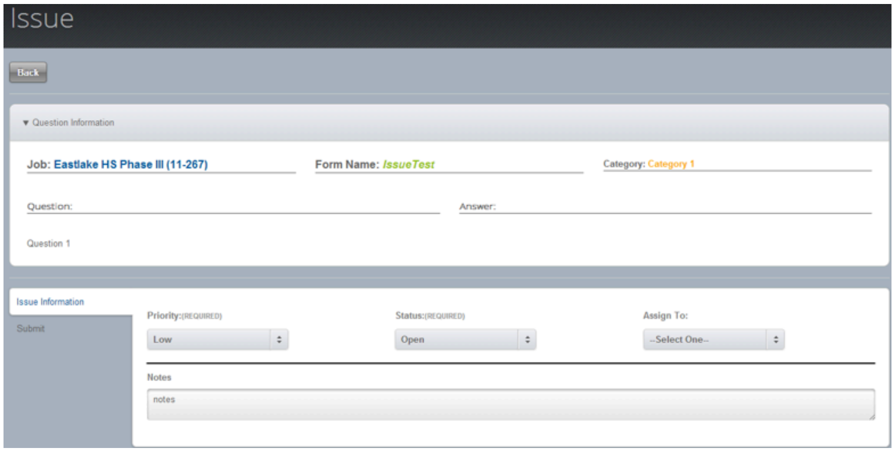
Click on the **View Issues** button. You will then be directed to the following page.



Issues are listed here by Id#, Form Name, Job, Date Created, Assigned To, Notes and Q/A. You will also have the option to Edit the Issue and view the Issue document.

Click on the **Edit** button to the right of the Issue you choose to edit.

This will bring you to the following screen where you can view the information such as the Job, Form name, Category, Questions, and answers.

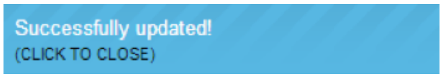


To edit the Issue Information use the drop down arrows to the right of the Priority, Status, and Assign To areas. You can add notes to the Issue by entering the information into the note space provided.

When you are finished click on the **Submit** space located in the grey area to the left.

You then have to click on the **Submit Issues** button as seen in the example above.

If submitted successfully there will be a blue fading message appear in the top right corner of the screen.

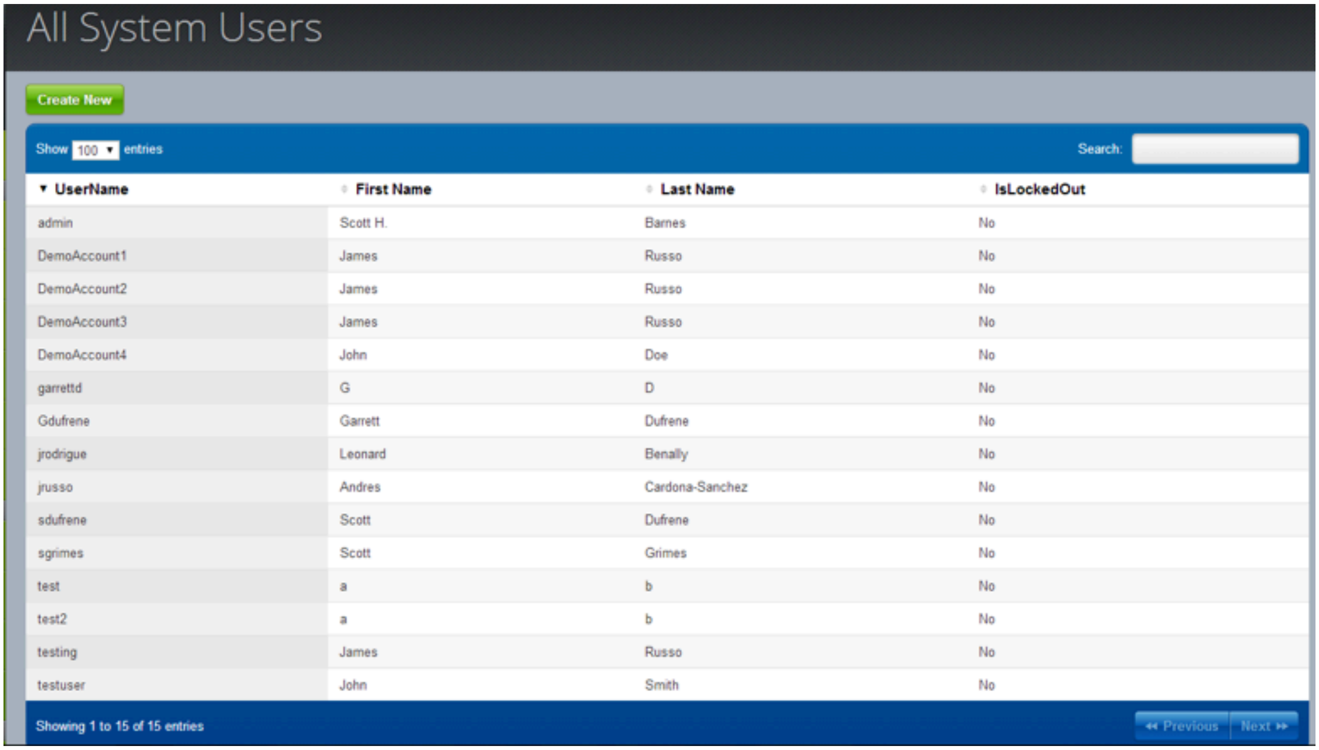


Upon successfully updating the Issue you will then be directed back to the All Jobs screen.

MANAGE USERS

By clicking on the **Manage Users** tab you will be directed to the following screen where all the system users are listed by User Name, First Name, Last Name and Locked out status.

Here you will have the option to create a new user or search for a particular user by entering into the search field to narrow down the search.



UserName	First Name	Last Name	IsLockedOut
admin	Scott H.	Barnes	No
DemoAccount1	James	Russo	No
DemoAccount2	James	Russo	No
DemoAccount3	James	Russo	No
DemoAccount4	John	Doe	No
garrettd	G	D	No
Gdufrene	Garrett	Dufrene	No
jrodrigue	Leonard	Benally	No
jrusso	Andres	Cardona-Sanchez	No
sdufrene	Scott	Dufrene	No
sgrimes	Scott	Grimes	No
test	a	b	No
test2	a	b	No
testing	James	Russo	No
testuser	John	Smith	No

You will be able to create a new user into the system or edit an existing one by following the examples as seen in the following pages.

To create a new user, click on the **Create New** button in the All System Users page. You will then be directed to the following page.

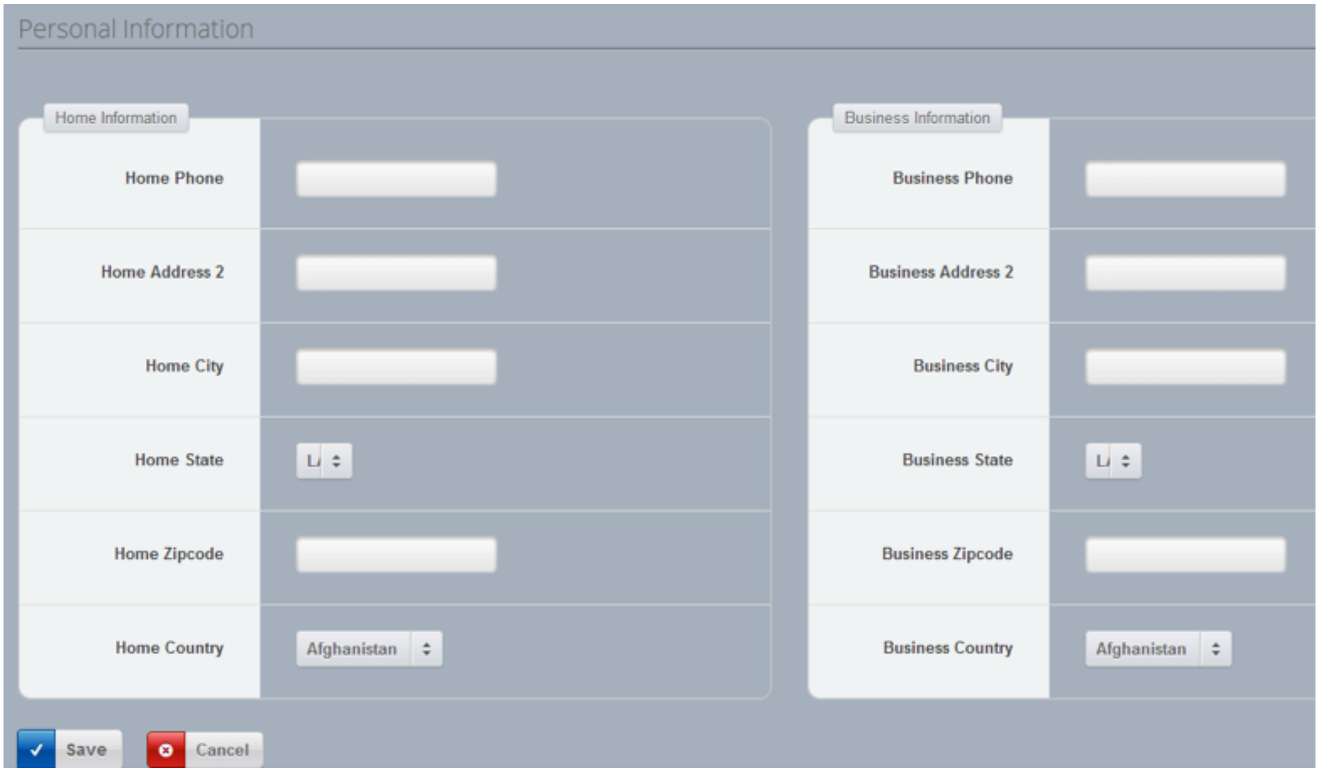
Creating System User

Enter the information in the spaces provided.

Click on the **Save** button and the new user information will be submitted and saved into the system.

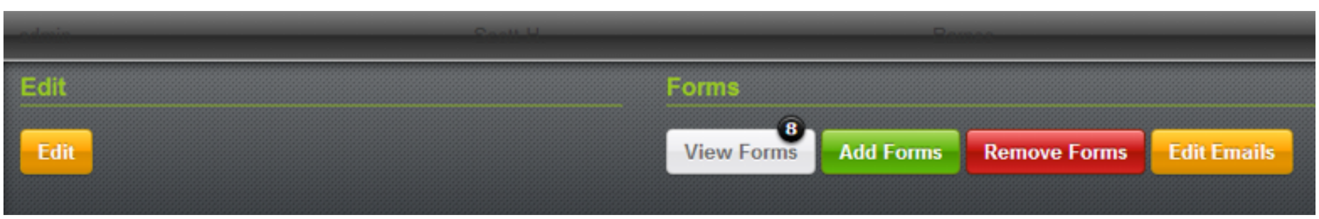
If you have entered the information in error, or if you choose not to submit the information into the system at this time, click on the **Cancel** button.

You will then be directed back to the All Systems Users page.

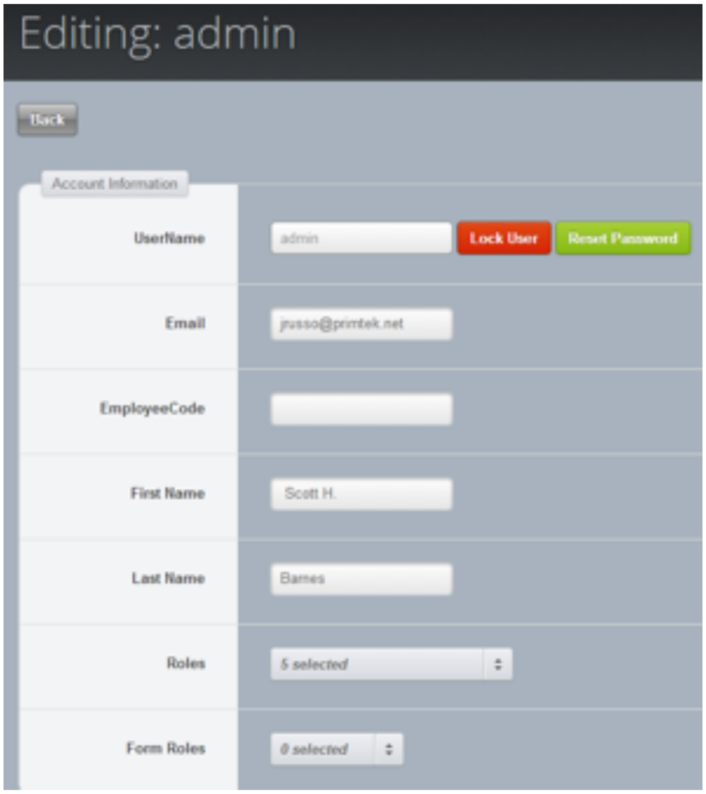


To **edit** a user hold your cursor over the name of the user you choose to edit and left click.

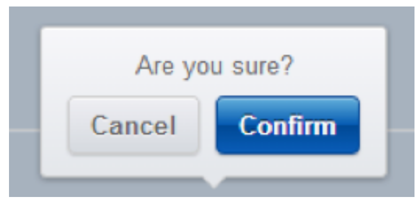
This will bring you to the following which will allow you to edit that particular user, view forms, add forms, remove forms and/or edit emails.

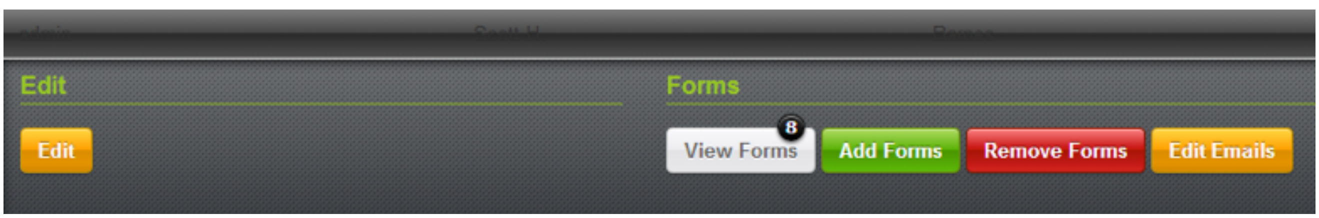


Click on the edit button to edit the user.



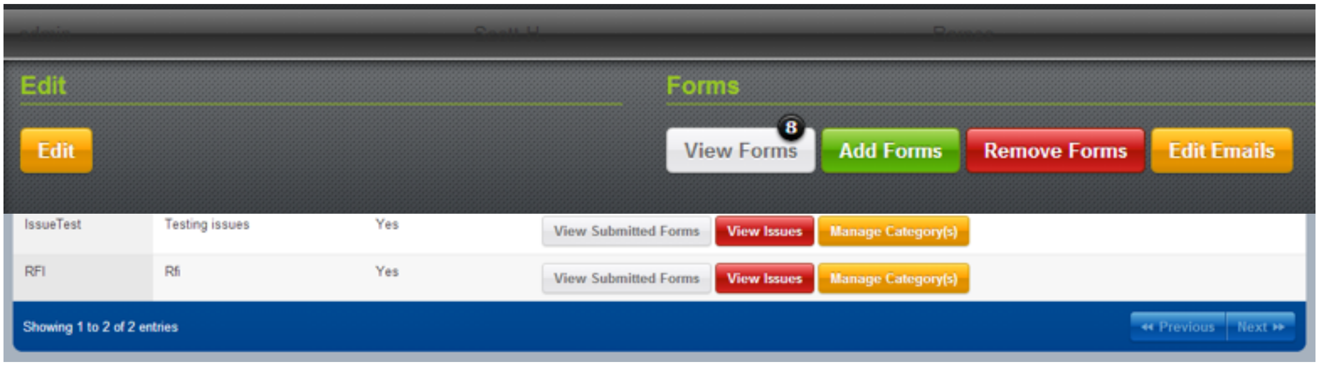
In this screen you will be able to lock the User and/or Reset their password. You will see the following asking if you are sure and want change the password.





button to be directed to the following page where you can see all forms associated with the particular form. The number in the small black circle is the number of forms that are associated with the user forms.

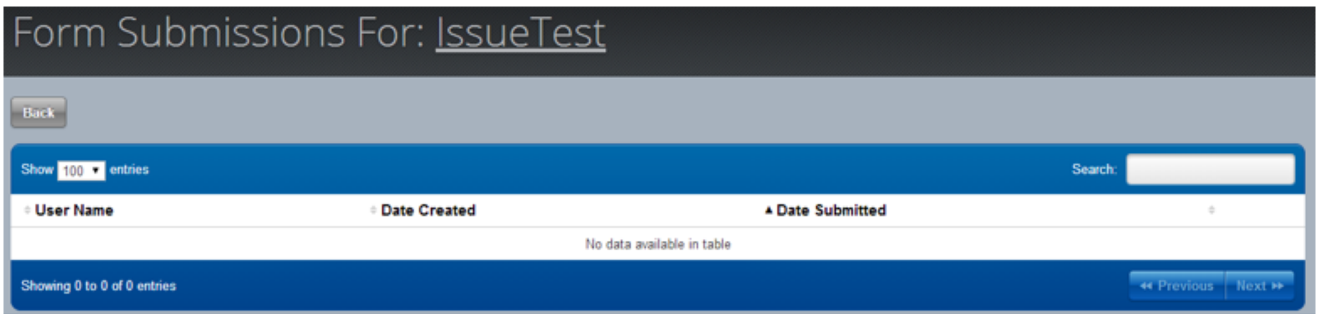
Here you will have the option to View Submitted Forms, View Issues, and/or Manage Category(s) by clicking on the selected buttons.



To see the submitted forms click on the **View Submitted Forms** button.

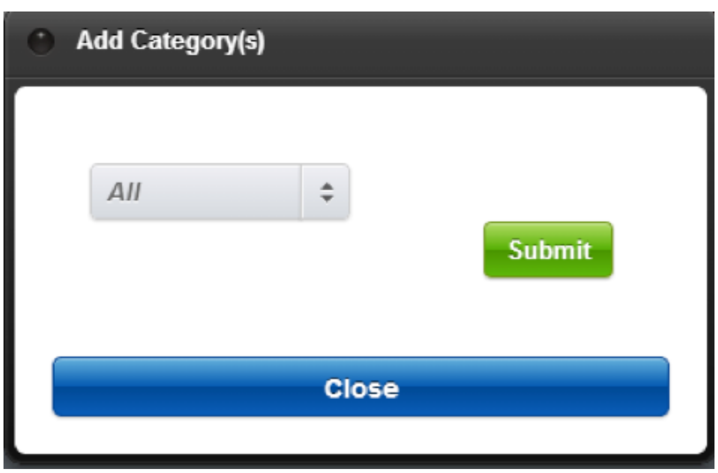
You will then be directed to the following page.

If there are any forms that are submitted they will be listed on the page as seen in the example below.



Click on the **View Issues** button to see all the Issues that are associated with the form.

Click on the **Manage Category(s)** button. You will then be directed to the following screen.



Click on the drop down bar to the right of the All button as seen above.

Make your selection and click on the **Submit** button. The following message will appear in a blue fading bar as seen in the example below.