IRISTRACE
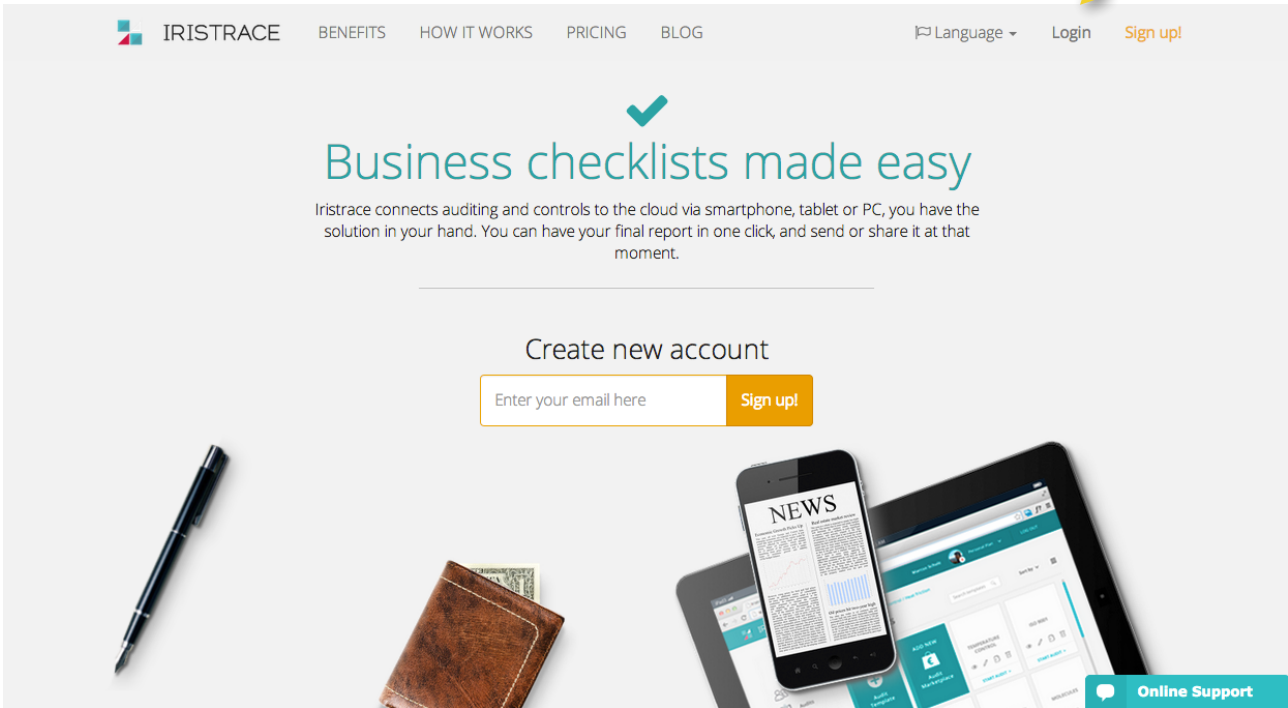
BUSINESS CHECKLISTS

USER MANUAL

Updated: 3 Feb 2015

GETTING STARTED WITH IRISTRACE

First of all, go on www.iristrace.com choose under the bottom "language" "English" then click the button: Log in

Enter your e-mail address and your password. If you don't remember it, please click on the link below.

If you need help, please don't hesitate to contact us

hola@iristrace.com

This is the main dashboard from which you will be able to manage your Iristrace account.

From the first moment, you can see the first 3 main actions you need to start using Iristrace. You can also access from the menu to all other options.
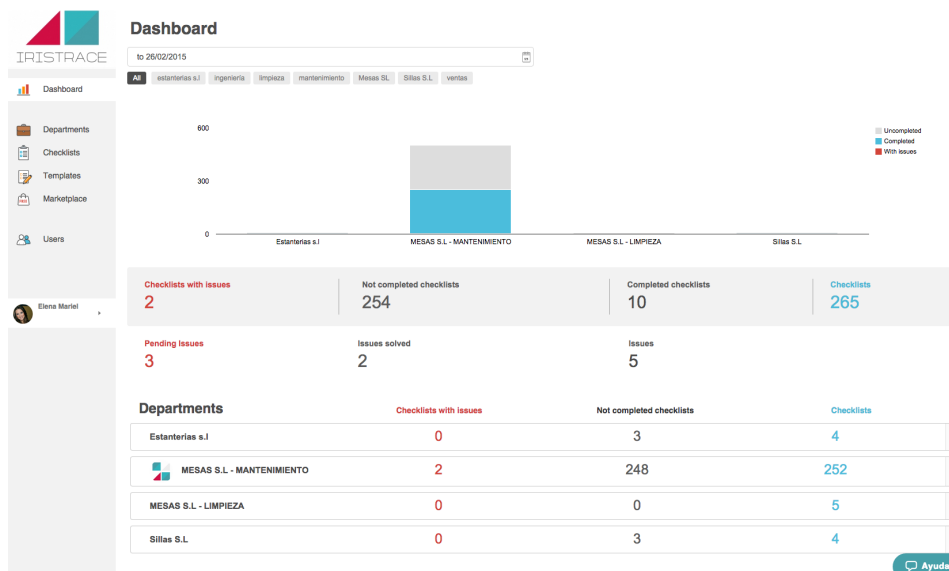
Which sections are in Iristrace?

- Dashboard: General situation of your checklists

- Departments: A department is a customer, shop, team, location. Whatever you use to organize your inspections and audits. You can create as many departments as you need, and assign each user to a department.

- Checklist: In this section, you will have your entire checklists assigned to departments and users.

- Templates: Before answering a checklist, you should create a checklist template with all questions and answers.

- Marketplace: You can download 'templates' from other users' checklists and you can also use sample templates from the Iristrace team.

- Users: Each user will have their own private access and can create as many users as they need for their organization.

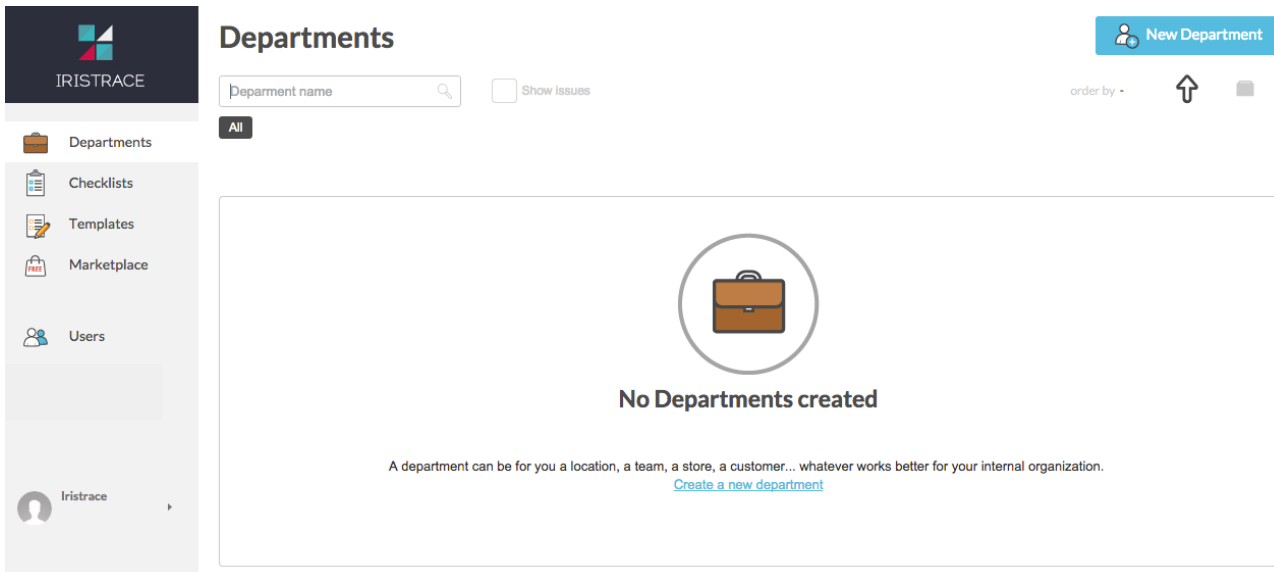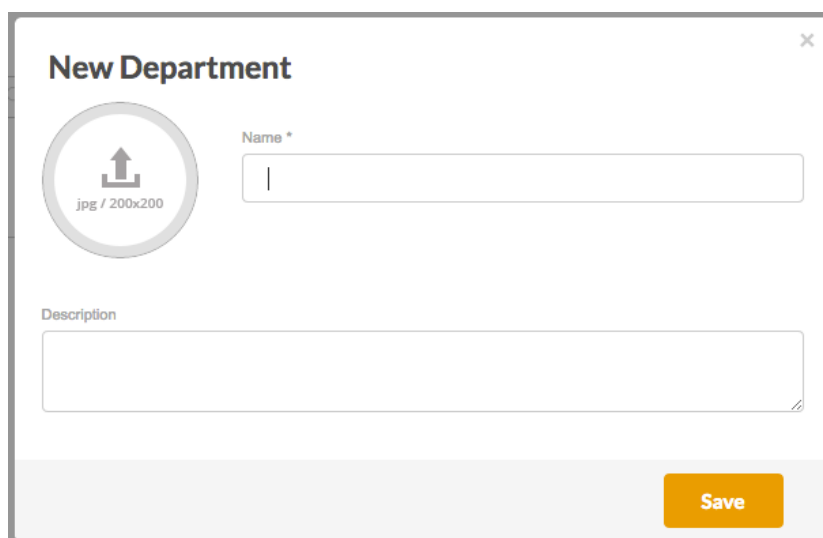- Account information: all your information regarding your Iristrace account.

DEPARTMENTS

Like we said before a department is a customer, shop, team, location. It is whatever you use to organize your inspections and audits.

To create a new department you must click on the 'Departments' section and then click the blue button in the upper right corner 'New Department'.

A new window will open where you can enter the new department's name, logo and description

When you save the department, you will have a full record of it where you can continue filling out data needed: For example: email, phone, location, etc.

Furthermore, you can also have the possibility of using labels (tags) to filter all your departments.

Each department will have assigned one or more users. You can add or remove users from the bottom of this tab.

On top, you have all the department's possibilities. These are:

1. Which Checklists are assigned to this department
2. A Calendar with all planned checklists with specific dates
3. More features: You can attached documents (word, excel, pdf) to all departments and you also have the option to customize your future report with a header, footer or a logo.

Moreover, from the upper right corner, you can duplicate, archive or delete all departments directly.

If you want to customize the name of the label Departaments, go to the account details and click on Customización tab. Here, you can change the language of the account too.

If you add tags to the Departmets, you can use advanced filters of Iristrace. Furthermore you can modify the color of the tags, clicking directly on the tag and choosing the colour.

TEMPLATES

Once you've created the departments you need, the next step is to create checklist templates.

The process to create a new template is the same as building new departments, you need to go first to 'Templates' section and click on the 'New Template' button.
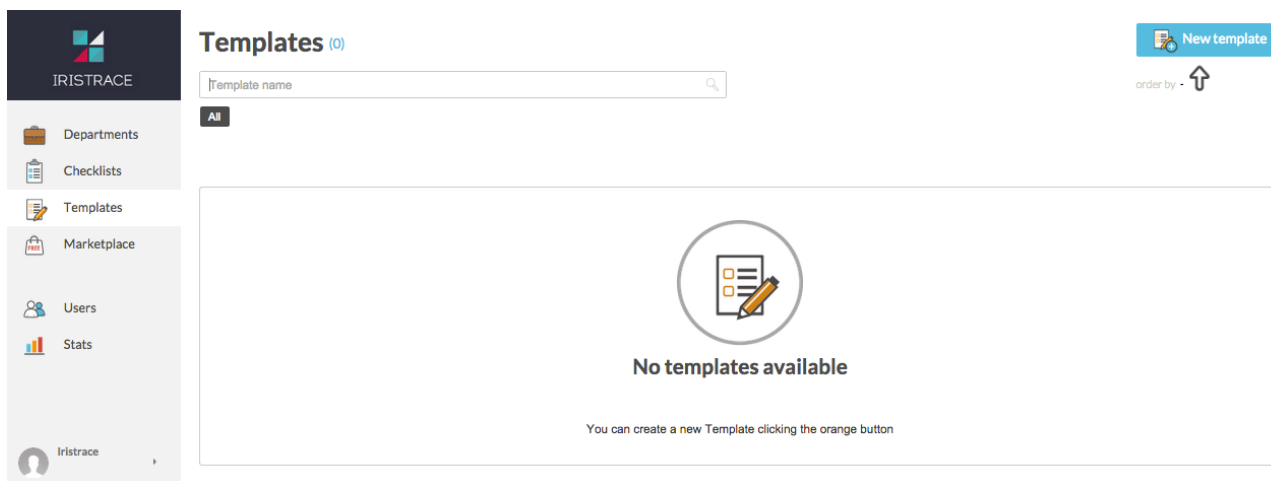
A new window will open where you can enter the name of the new template and a logo that identifies it.
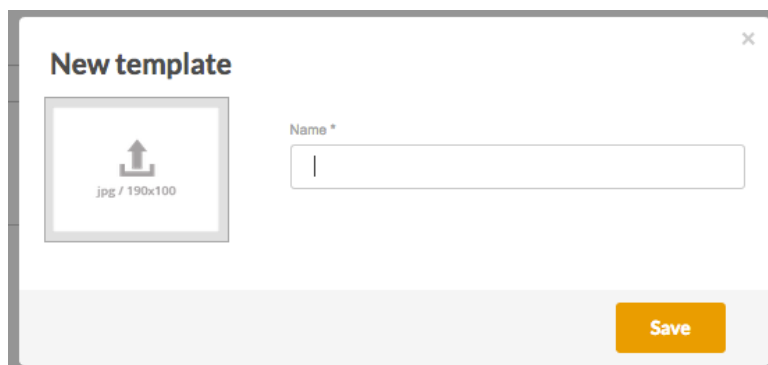
Once you have created it, you can start adding sections and questions to your checklist template.

Why use Templates?

You can create templates and then transform them into checklist. Doing this you can have a database of questions that can be easily adapted to each of your departments' needs.

The initial screen to create a new "Template" is seen as follows:
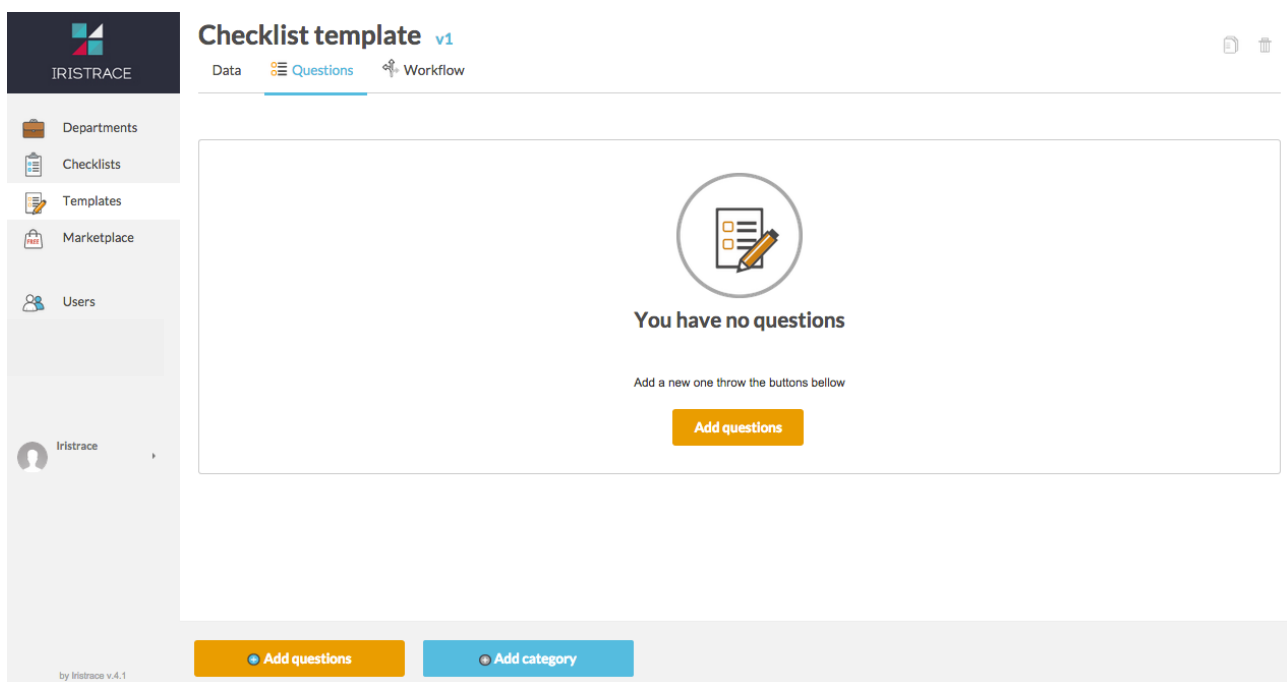
You can start by creating a new Category or Section so you can build a type of index. Then, you can add all your questions under this section by pressing the (+) button, so they can be added in it.
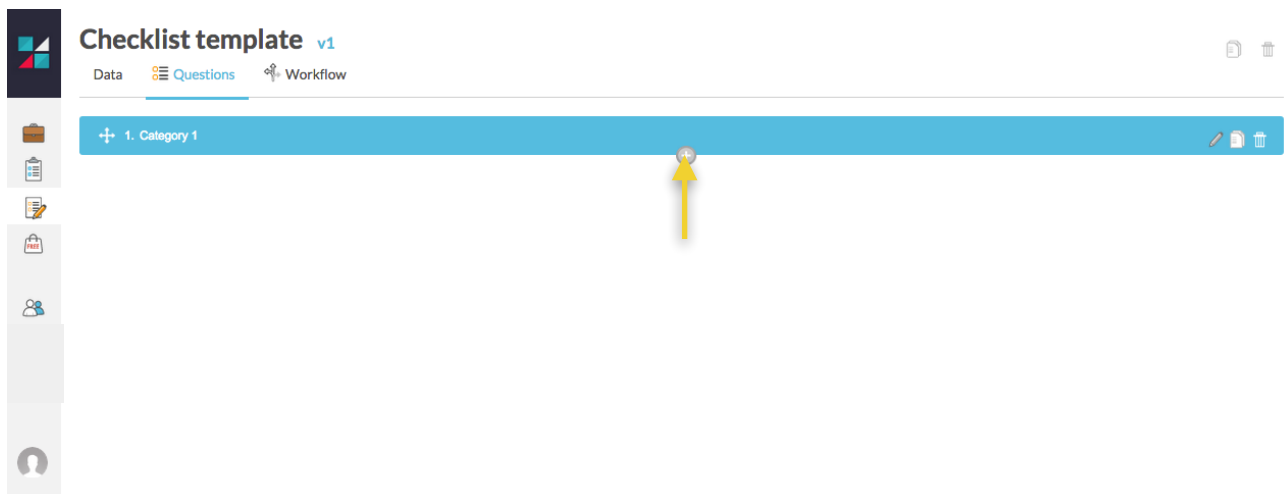
If you want to add in questions to categories, you should click on the left cross of the question, dragging to the right into the box or category you want.

When adding your new questions. You can choose between the following types of responses:

Add New question

T	**0. CATEGORY**

1. CHECKBOX	2. SINGLE CHOICE	3. MULTIPLE CHOICE
✓	Answer1 / Answer2 / Answer3	✓ Answer1 / ✓ Answer2 / ✓ Answer3

4. NUMERIC	5. TEXT	6. SLIDER
Label1 ☐ - ☐ ºC / Label2 ☐ - ☐ ºC	Label1 ☐	⬡

7. DRAW	8. SIGNATURE	9. SMILIES
🖌	✍	😐 ☹ ☹

0. **Category:** to add a new category to the template.
1. **Checkbox:** Questions with only one validation needed.
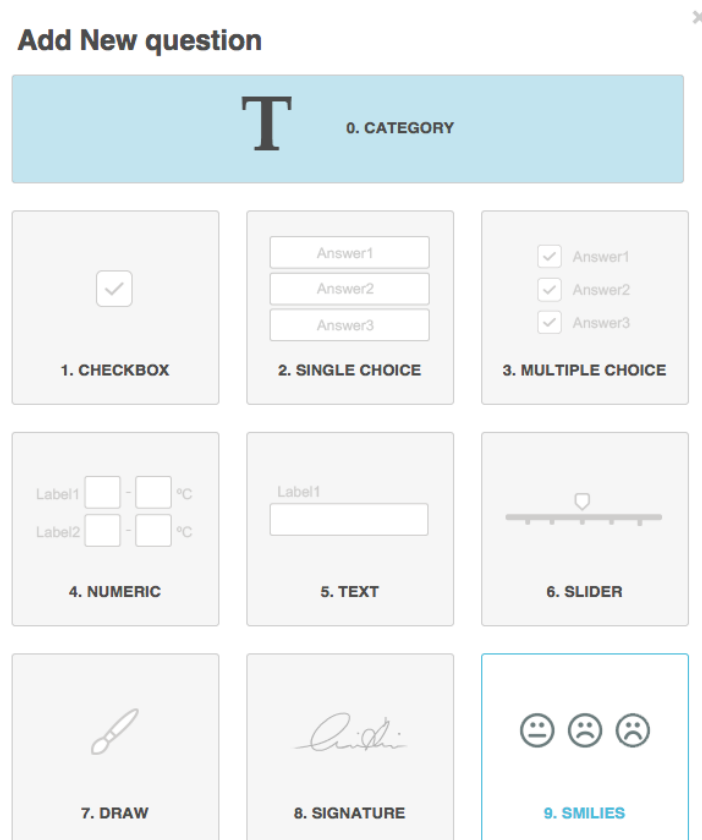2. **Single choice:** One choice for all possible answers, you may select only one, also, you can assign each answer a color.
3. **Multiple choice answers:** You can select multiple answers.
4. **Numeric answers:** To evaluate your answers numerically. For example: temperature, humidity, percentages or amounts. You just have to indicate the numbers, units you need and if it is necessary a maximum and minimum limit.
5. **Text:** Questions that need a text field answer.
6. **Slider:** To create assessments slider, you can add the minimum and maximum range as well as the laps between the assessments.
7. **Draw:** For answers that require a drawing on a white background.
8. **Signature:** In case you may require a signature field.
9. **Smileys:** valorized answers with smileys

All responses have the options of:

⚠️

Create an alert sign: In particular answers you can create an alert sign. You can put it on the alerts section and solve it later. In addition, the alerts can be part of a rule of workflow and have an implication. For example: If the freezer's temperature is out of range then the system will automatically send an email to the maintenance department.

🔔 0

Evaluating responses: you can give a value to each answer, then in the report, you can find the final assessment with average percentages or average numbers.

Furthermore, when you are answering the questions you can:

💬 **Comments:** when answering the checklist, you can add any comment to your answer.

📷 **Attach a picture:** You can attach a picture to the checklist if you answer from a computer, tablet or smartphone. You can also take a picture at the time.

📎 **Attach a document:** Add any document in word, excel or pdf to your answers.

⚠️ **Immediate Alert:** Answering a checklist you can push the button 'immediate alert' when you need it.

Once you have added all questions, you can move to the template's data and fill in everything you need.

- **Tags:** the same as the departments, this will help you to filter and identify all your checklists in the future.
- **Audits:** you can add a number, location, personnel in charge and get a full report.
- **Random questions:** you can generate checklists, with the number of random questions you need, based on a template.

- **Rating units:** if you wish to evaluate your checklists' answers, you can choose here an assessment for each answer of your checklists.

 It can be a plus (+) or an average percentage (%).
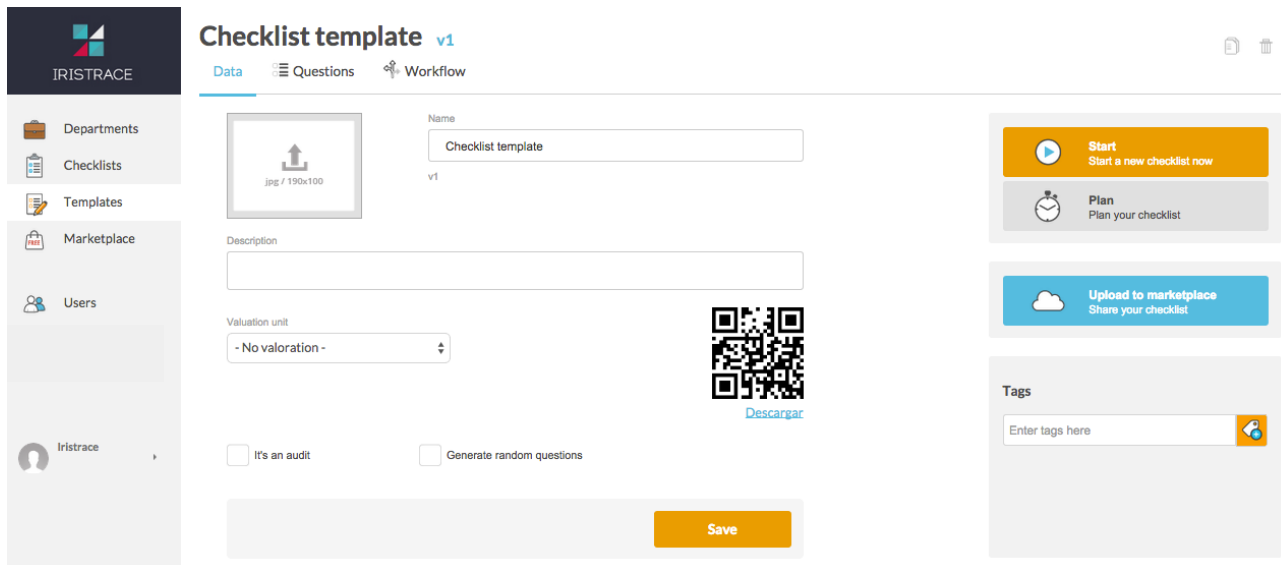
- **QR code:** It is a bar code that identifies your templates. The moment you scan it you can access all questions directly.

Once you have all data from your Template, you will be able to:
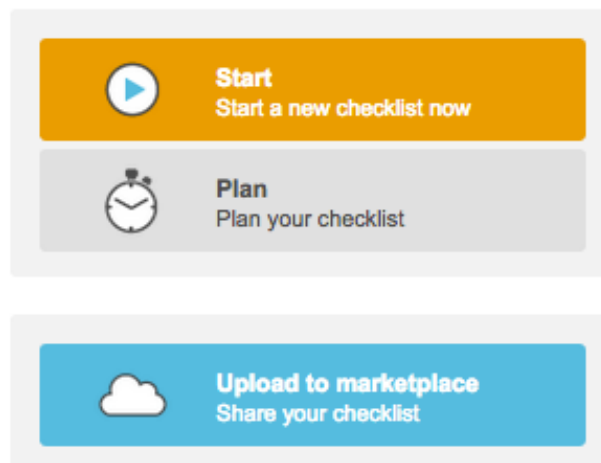
1. **Start:** this will take you directly to answer all checklists. Selecting at first step which department you wish it to be assign.

2. **Plan:** You can choose to schedule a specific date on the calendar and also set a frequency for all your checklists. For example: every 15 days the storage room has to be checked. You also can assign it from everywhere checklists to different departments. With the

Iristrace system you can set the time and date you need it to be done.
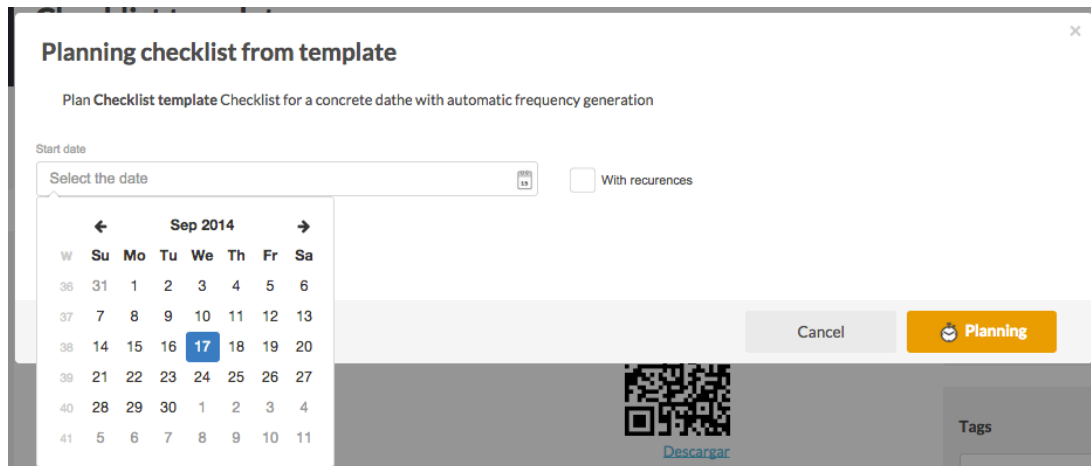
3. Upload to Marketplace: make available to all Iristrace users your templates. (not mandatory)

Besides, you can use the template or remove it directly from the upper right corner

Workflow

It allows you to automatize a process of a warning notice with an email or a new Checklist plan assigning it to any department. If any of the following situations happen when answering a checklist:

- If an incident occurs
- Checklist ends without incidents
- The checklist is not complete
- A specific question is answered with pictures, incident, with or without response, without comment
- The assessment checklist is more or less a figure

When you want automatize a process of a warning notice you should go to the template, and click on the 'Workflow' tab.
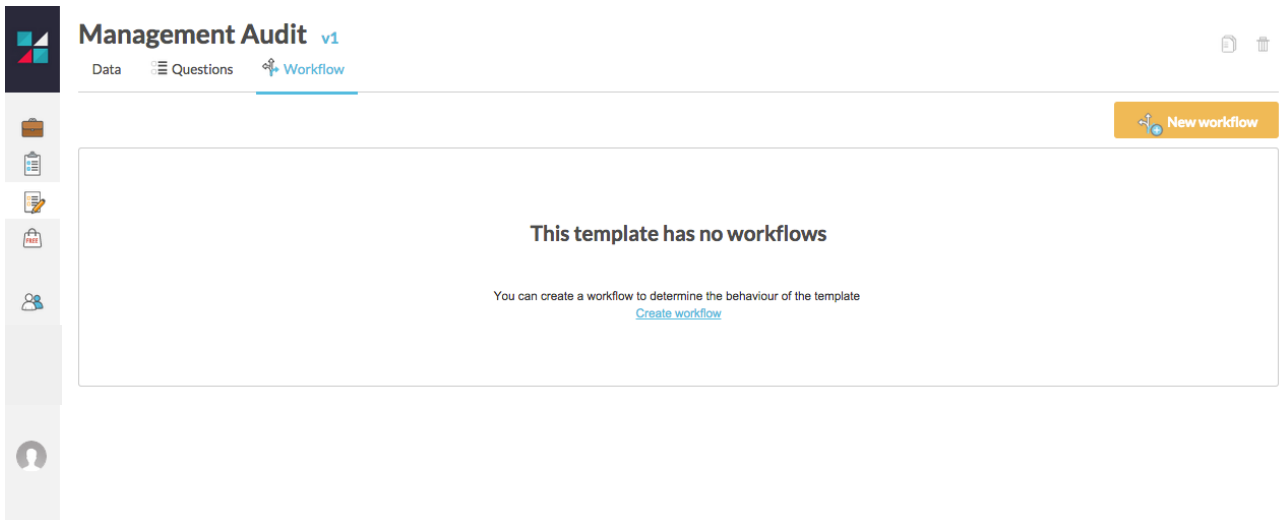
Here, you will have available all the 'Workflows' created for this template and you can create new ones clicking on 'New Workflow'.

When you want add a new one, you have the following options:
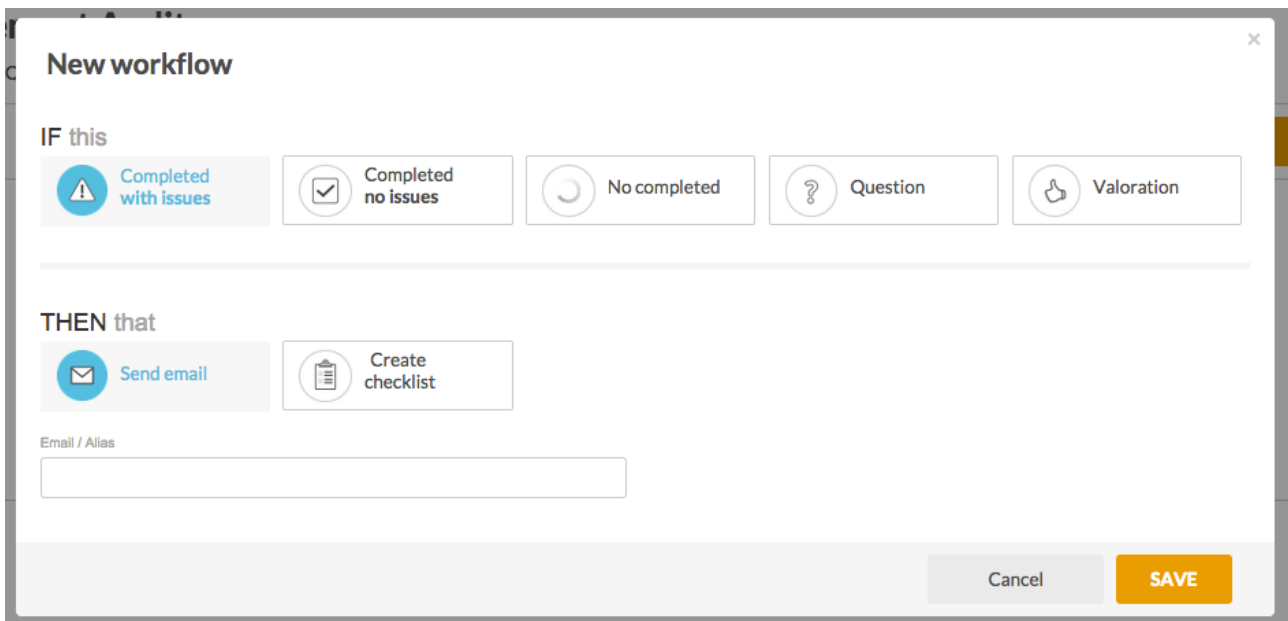
And it's here, where you could create as many automatizations as you need.

The workflow makes Iristrace a flexible tool to manage your controls and processes.
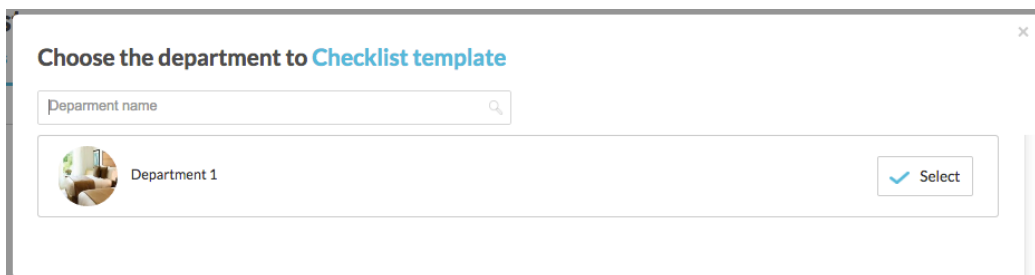
CHECKLIST

When you have made all your templates you can convert them into checklists. First you have to click on "Checklists" and then go to "Reply checklist" button.
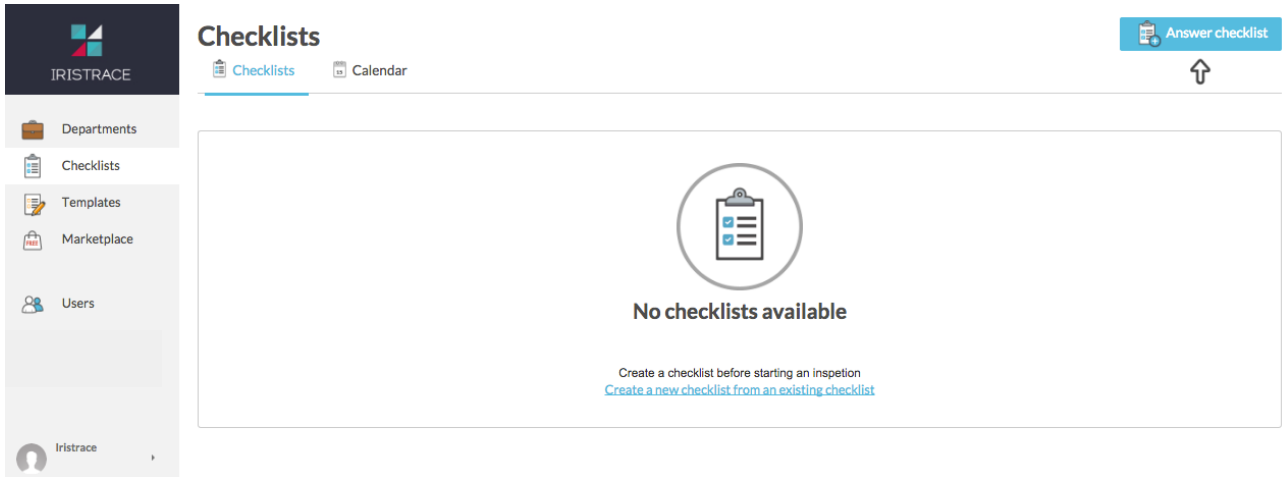
A window with a list of templates that you have created will open and you can choose which one you need.
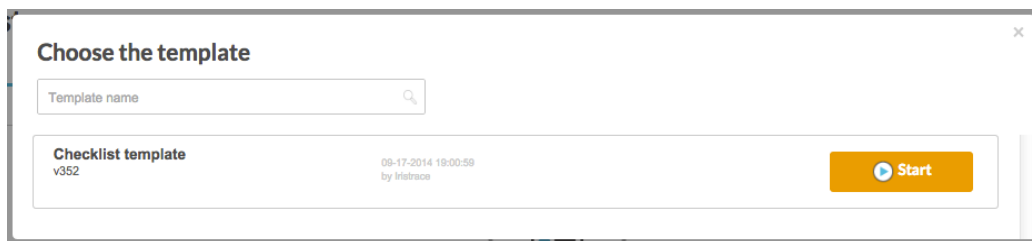
To continue, you must assign the department.

Then you can begin to answer the checklist from the computer.
If you want to start it from a tablet or smartphone, you must access from the device and the department has to be assigned with a checklist. (*see: Planning checklists*)

When you want to finish the checklist, you have 2 options:

- Ready for QC para revisión: you finish the checklist but you allow the Controller or the admin to check it and finish it.
- Finish checklist: The user complete and finish the checklist.

There are 5 status of a checklist:

1. inicial -> the checklist has been planned but not executed yet
2. in progress -> the checklist is being answered
3. ready for QC -> the checklist is answered and waiting for QC
4. in QC -> the checklist is now being reviewed by the supervisor
5. Completed -> the checklist is completed

Once you finish the checklist, there are some tabs with information about it:

Data   ⚠ Issues 2   ⚴ Workflow   📷 Media   Activity

Issues: the red number is the number of issues the cchecklist have. Here you can see the comments and pictures that the user have made answering the checklist. You can answer and fix the issue from here, and see the evolution or resolve the issue with one click.

Workflow: where you can see the automatized workflows that this checklist had previously in the template.

Media: you can see here all the pictures that the user upload to Iristrace while was answering the checklist. You can see here if the pictures are positive and negative.

Actividad: here you can see the table of the activity that the users have made on the checklist: questions answered, modifications, checklist status…

USERS

You can create as many users as you need within your organization with Iristrace. To start, you only have to go on 'Users' section and click on 'Add a new user'
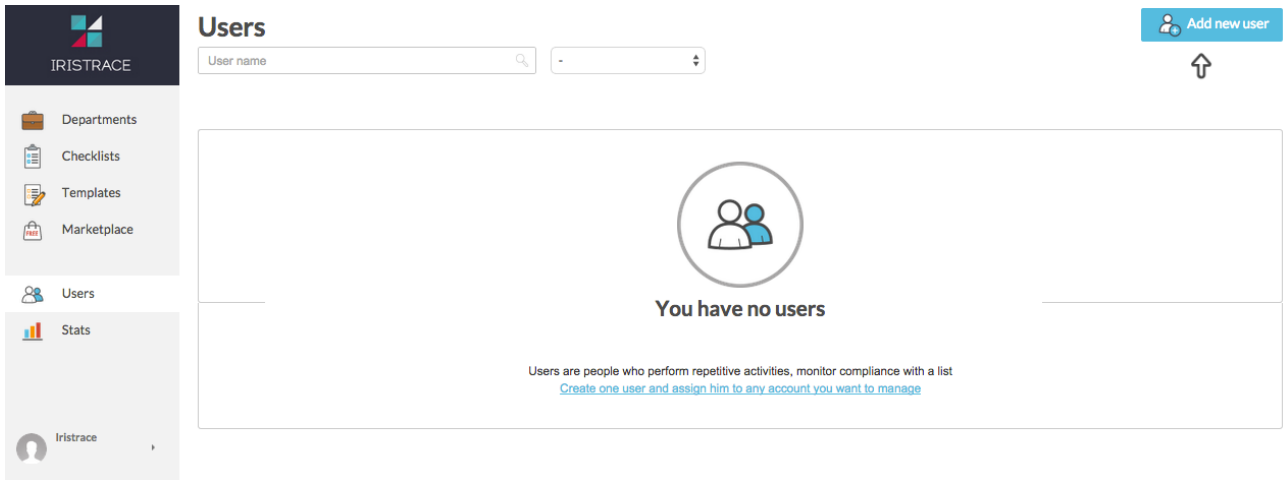
You should fill in the user profile with an email and password from which he or she can access to the information you allow him/ her to enter.

You can choose your user's role:

- Checker: The user is only allowed to answer checklist.
- Controller: User is allowed to create new users and departments
- Admin: All access

Furthermore, you can also create a "viewer user". This user will be only allowed to see data from your account.

Once users are created, you can go to 'Departments' section and select within each department which users are authorized to enter this department. So they will be only able to see checklists associated with this department.

Important: You should also know that a user can belong to several departments.

USER ACCOUNT

Your admin account is allowed to see and change:

- Personal data
- Invoicing
- Standard answers
- Customization

The last ones allow you to customize your Iristrace account.

Standard Answers

If you usually use the same answers in your templates, this feature will be very handy. You can create your 'standard answers' then later you can select them when you are creating a new template.

Customization

You can replace the logo of Iristrace menu with your own corporate logo right away from this tab. Furthermore, you can choose the sizes of your logo for your tablet and smartphone.

Customize corporative image

Corporative logo

.jpg 190x100

Responsive logo

.jpg 80x100

Mobile logo

.jpg 480x100

Save

Customize documents

☐ Header on final report

☐ Footer

☐ Personalize disclaimer

☐ Personalize confidentiality

On the other hand, if you want to customize your reports with headers, Footer's disclaimer and confidentiality note, this is the point that you can edit them all.

With Iristrace you can always safely leave the system by logging out from your account.

Data > Permissions

In Iristrace, we offer you the opportunity to customize you own URL input application from this window. You can choose your subdomain and define the IPs from which you will be allowed to connect to Iristrace.

Permission

URL*

subdomain .iristrace.com

IPs

Introduce las IPs entre comas.
Si no se introduce ninguna no habrá limitación de IPs.

CALENDAR

Each Department has a Calendar view where you can see the plan over the time of your checklist: monthly, weekly or daily basis.

In red color, you will have the Checklist with issues that you should check. Clicking on it, you will go directly to these alerts.