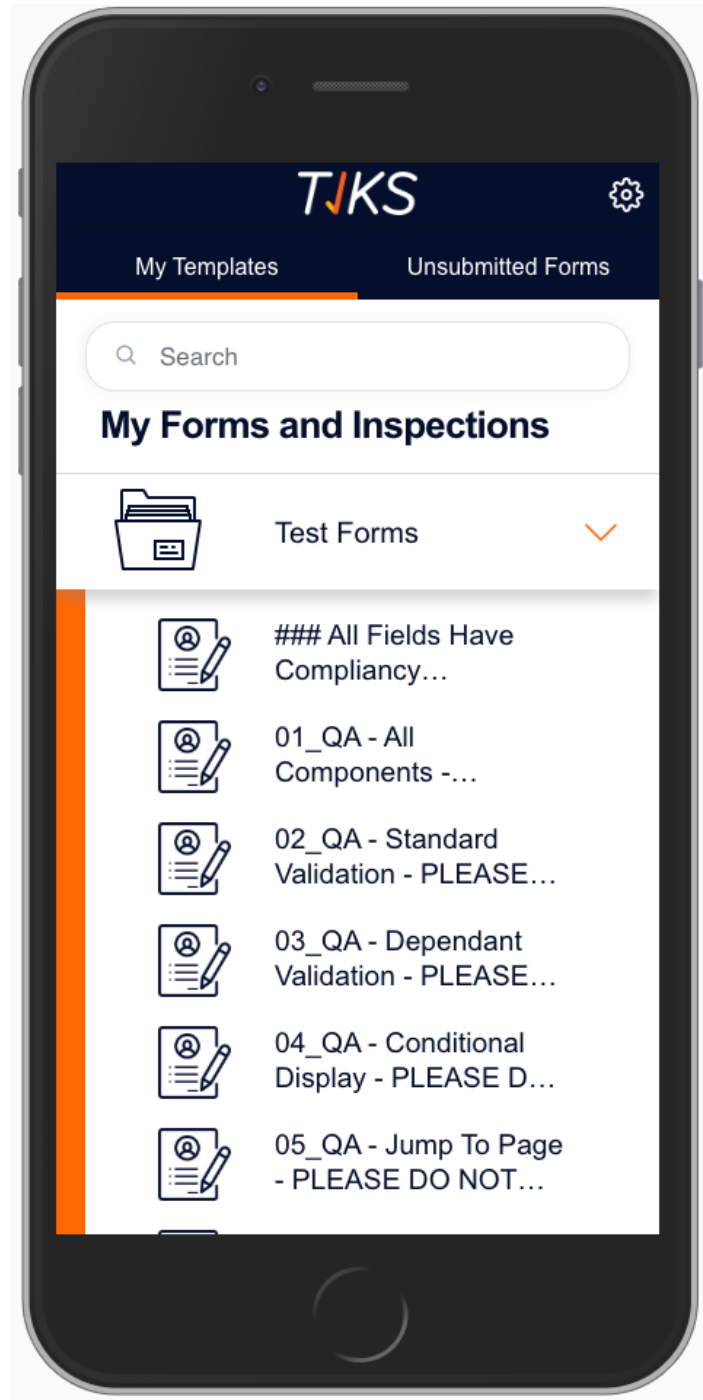


# TIKS Assure User Manual

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## 1.0 Getting Started

TIKS Assure is Australian engineered software designed to make pre-check forms quick & easy. Assure is a software application that digitally streamlines your pre-check process. Through its online portal, you can manage and create forms, sort forms into categories and run reports. Information is automatically Published according to your preferences. Users simply download the Assure app and tap their way to form completion. This manual explains Assure’s admin portal and how to create and manage pre-check forms.

### 1.1 Log In

To log into the Assure admin portal you need connection to the Internet. Launch any modern browser and create a new tab. Enter the Assure default URL:

Default URL:

<https://clientname.assure.stage.code.chocolatecoded.com.au/auth/login>

Default User-name: **firstname.lastname**

Default Password: **Ch8ng3m3**

- Enter your login credentials: username and password.

### 1.2 Admin Portal

Welcome to the Assure’s admin portal. At the left of your page are menu tabs; these are Reports, Forms and Categories, User and Mobile User. From Assure’s admin portal you can manage and create forms, categories and generate reports.

## 2.0 Reports

After logging into Assure’s admin portal, the default-landing page is Reports. All data that is captured using Assure’s app is seen here. Assure has the reports function that allows you to filter through data, generate reports and export results as a CSV or PDF file. Reports will only ever display data from active forms that have been filled at least once. As the data set increases in size the report graphs adapt to display the information.

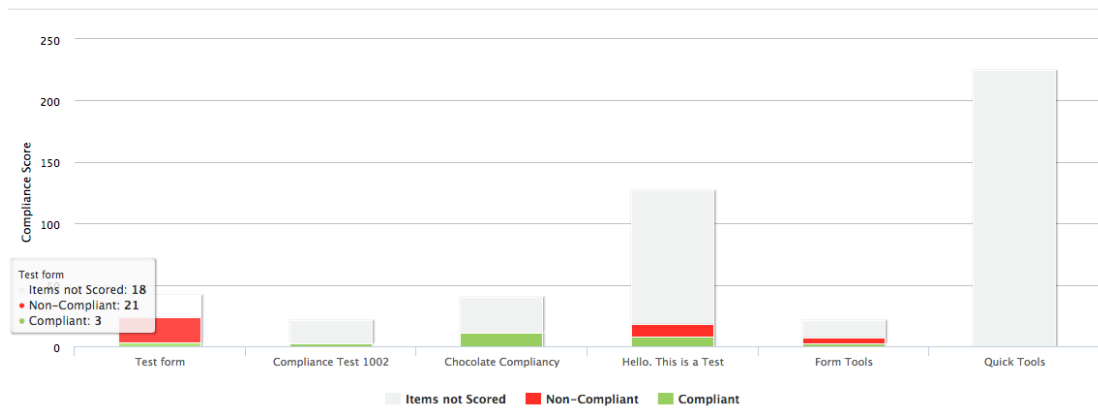
### 2.1 Filter Report Data

To filter report data, simply select your range criteria from the drop down menu and press the blue *Apply* button to narrow/ refine your search.

- ‘Filter By’ ranges include Form types and Date range.
- Reports results are displayed as a bar graph.

### 2.2 Reports Graph

Reports graph displays the following values: Not Scored, Non-Compliant and Compliant as a bar graph. Each bar represents an individual form. The Y-axis represents total compliance score; the X-axis represents the name of a form.



The following table indicates score value:

Score Value	Colour Code
Items not scored	Grey
Non-compliant	Red
Compliant	Green

- Hide/unhide any score by clicking on its corresponding label, doing this will alter the graph too.
- The Report Graph is interactive; when a cursor is hovered over a bar, numeric points will display data within your selected date range.

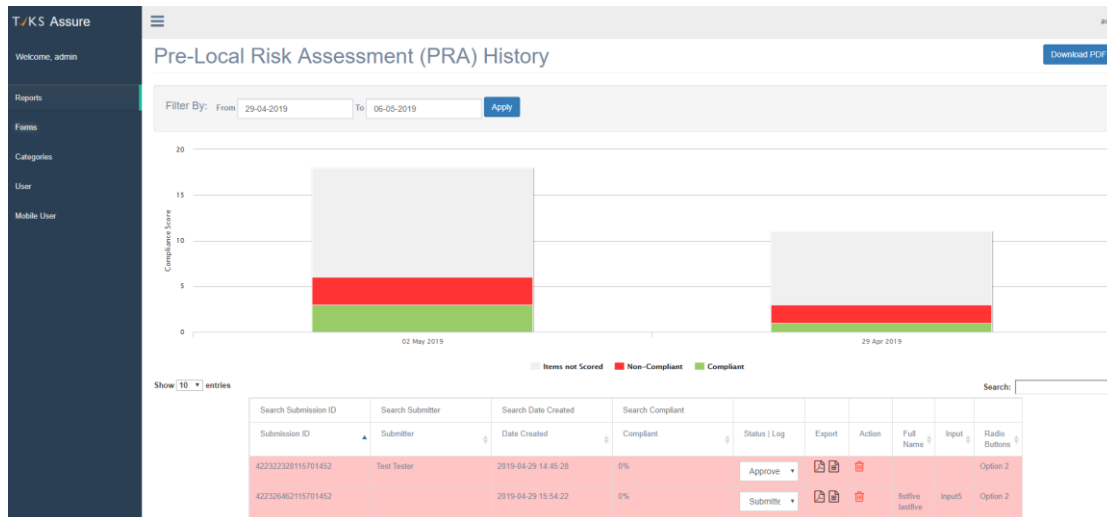
### 2.3 Report Table

- At the bottom of the page is a list of active forms.
- To be active a form needs to be completed and submitted at least once.
- View the history of each form by selecting 'View History' highlighted in blue.

Title	Submissions	Last submission	Summary
Test form	6	07/11/2014 11:20 AM	<a href="#">View History</a>
Compliance Test 1002	1	31/10/2014 6:04 PM	<a href="#">View History</a>
Chocolate Compliancy	4	07/11/2014 9:58 AM	<a href="#">View History</a>
Hello. This is a Test	9	07/11/2014 10:26 AM	<a href="#">View History</a>
Form Tools	7	07/11/2014 1:52 PM	<a href="#">View History</a>
Quick Tools	21	07/11/2014 12:01 PM	<a href="#">View History</a>

### 2.4 Form History

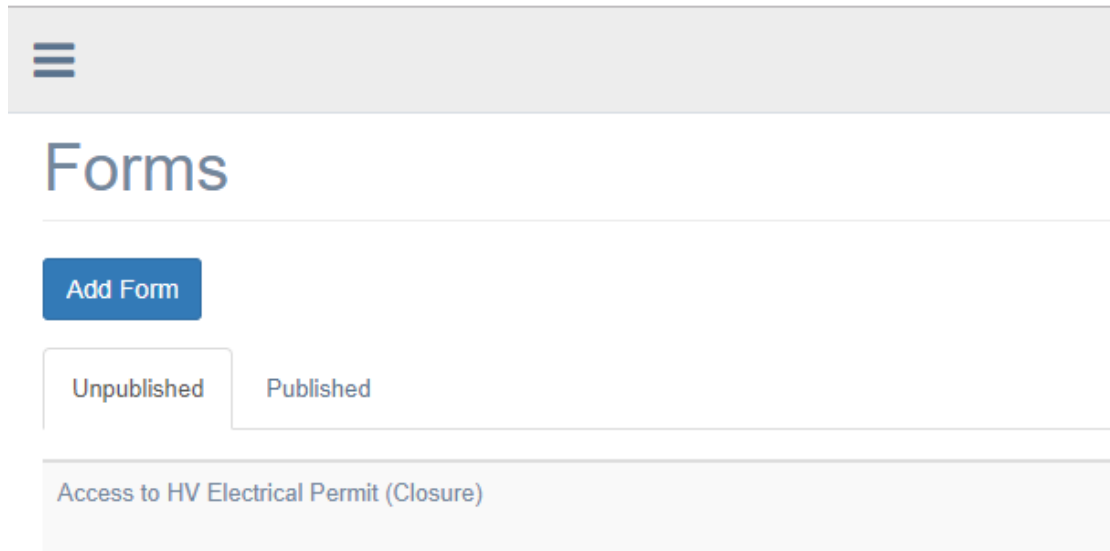
- Form history displays the same values as the Reports page.
- Bars represent a single day within your selected range
- Compliance is displayed in percentile
- Download a PDF, or CSV file for individual form entries.
- Download a PDF for the selected ranges by clicking the blue button at the top of screen.
- Change the status of a form under the status / log column:
  - Submitted [default], In Progress, Reviewed, Declined, Approved, Complete;
  - this is not tracked but allows an admin to change and observe the status of the form.



### 3.0 Forms

Forms tab is located on the menu bar at the left of your screen. Create new forms, edit or clone existing forms and sort forms into categories. Forms are divided into two main groups: Published and Unpublished.

*Note: users cannot view or use Unpublished forms\**

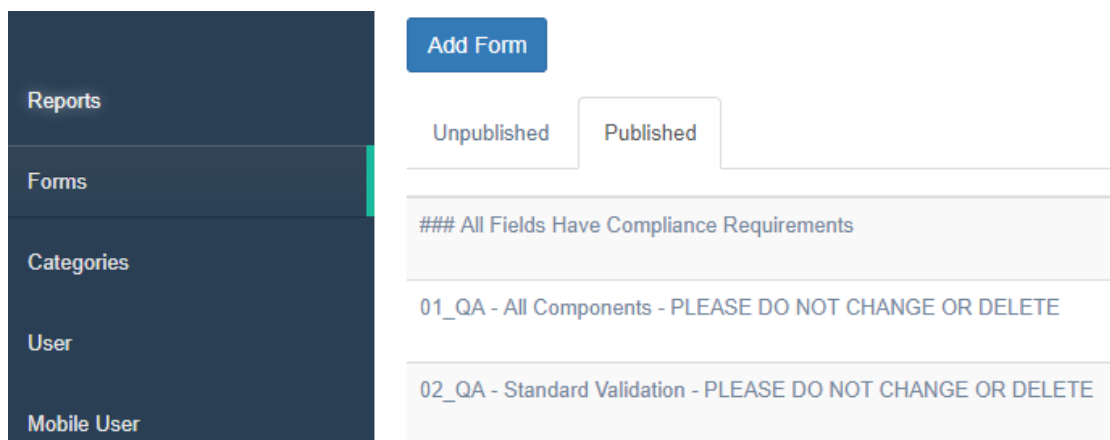


#### 3.1 Unpublished Forms

Unpublished forms are forms that have not yet been Published into categories. Assure users are not able to view or use Unpublished forms. Forms that are in the process of being edited are saved and can be accessed from this page at a later time. Hovering the cursor over a form will bring up its options. Edit a form, sort a form into categories, set recipients, or delete a form.

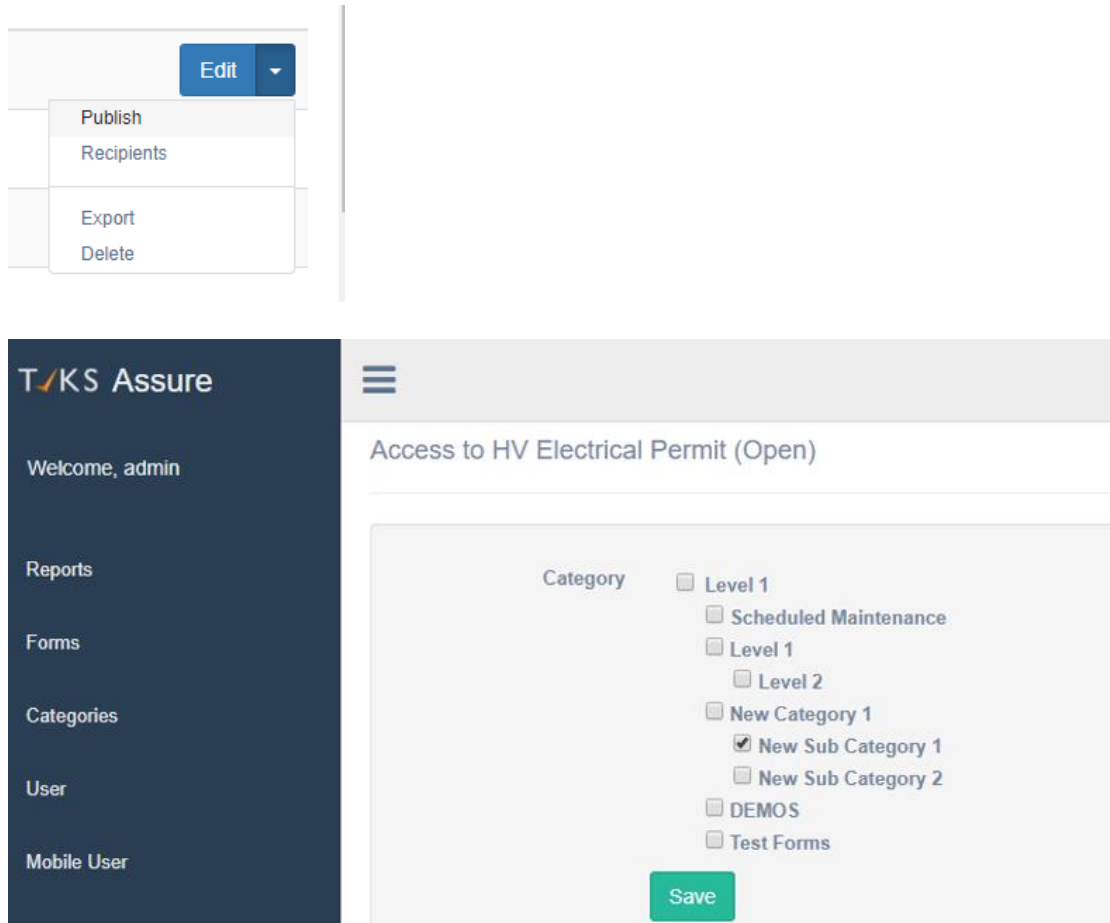
#### 3.2 Edit a form

To edit a form, select the blue *Edit* button on the right hand side of the table, this will launch the Assure form builder.



### 3.3 Publishing a form

To sort a form into categories, bring up the form options by clicking the blue *arrow* button. A drop down menu will appear, select *Publish* from the list. You will be taken another page that displays all categories; select the check box/boxes of the categories that form will belong to.



- Forms are managed via categories (see below).
- After a form is Published, users will be able to see and use the form on their mobile device via the Assure app.

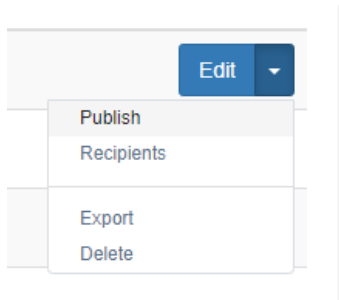
### 3.4 Published Forms

Published forms are forms that have been Published into at least one category. Once a form is Published, users can view and use forms on their mobile device via the Assure app.

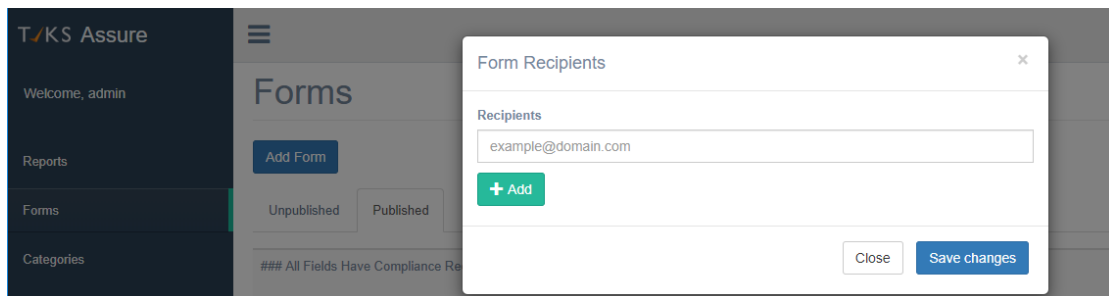
- Forms can belong to more than once category;
- Forms that belong to more than one category will display these labels separated by commas.

### 3.5 Form Recipients

Set a list of email recipients for each form. Form recipients will receive completed forms via email. Forms sent by email are a PDF format. If any part of the completed form is non-compliant the Form Recipients will receive a notification.



- Add Form Recipients by selecting the blue *arrow* button.
- Select Recipients.
- A new window opens up within the same page.
- Existing Form Recipients are listed here.
- To add a new recipient select the green *+ Add* button
- Type the From Recipients email address in full.



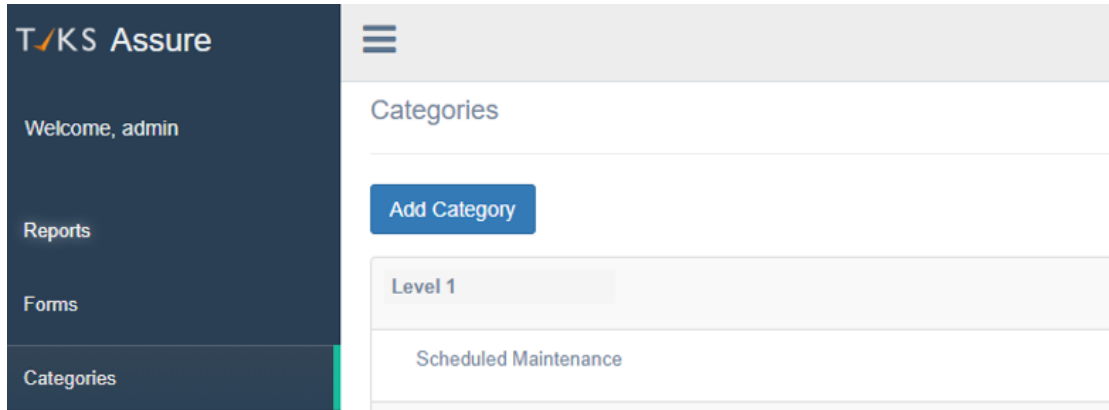
- After changes have been made, select the blue *Save Changes* button; this will close the window.
- If you do not wish to save any changes select the grey *Close* button.

### 4.0 Categories

Categories tab is located on the menu bar at the left of your screen. Create new categories, edit or delete existing categories.

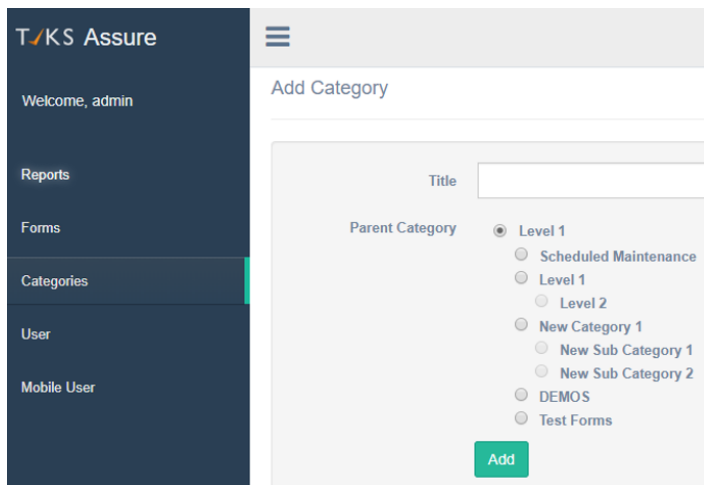
### 4.1 Families

Families are different groups that forms are Published into. Users see families' in-app as a levelled menu. Families make it easy for users to find forms.



### 4.2 Add Category

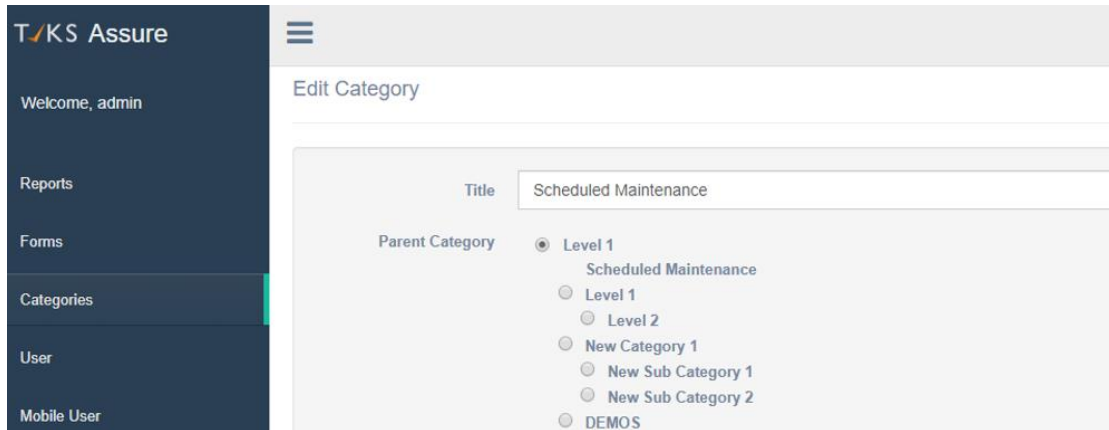
To add categories select the blue *Add Category* button. This will bring you to a new page, which displays a list of all existing categories.



- To add new categories simply type a label into the *Title* field;
- Then select which family it can be accessed from.
- New categories can only be assigned to one family group.

### 4.3 Edit Categories

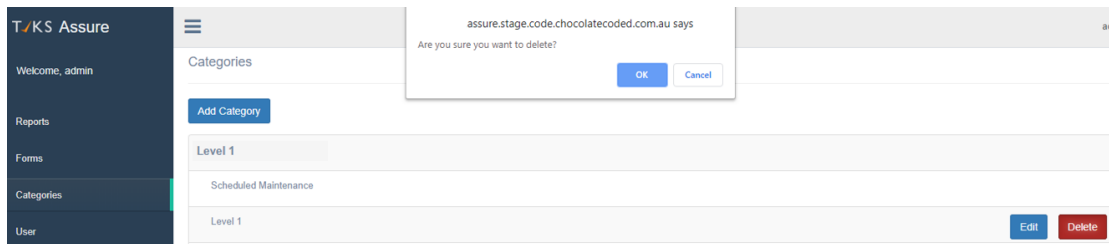
By editing a category you can either update the title – or change the family it belongs to. To edit a category, hover the cursor to bring up the blue *Edit* button. Selecting edit will bring you to a new page; this displays a list of all categories.



- Note that categories being edited do not display a radio button.
- To finish editing a category, select the green *Update* button.

#### 4.4 Delete Categories

You may need to delete a category if it is no longer valid. To delete a category select the red Delete button. Assure will prompt you to confirm your decision through a browser alert.

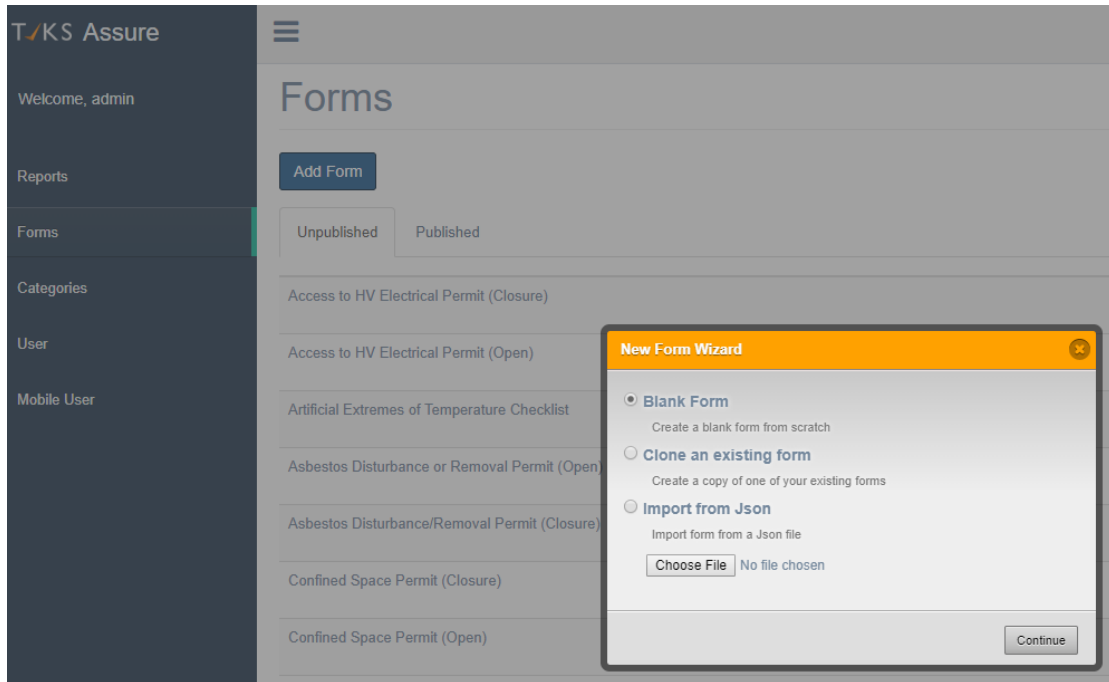


- Select 'OK' to confirm
- If you do not wish to delete select 'Cancel'

Forms can belong to more than one category. If a form belongs to a single category and that category is deleted, the form will return to *Unpublished Forms\**

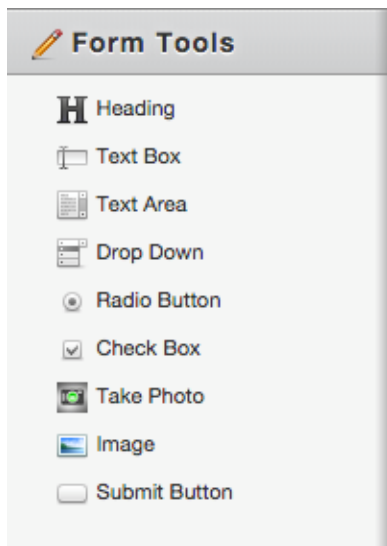
#### 5.0 Form Builder

Through the form builder you can create simple or more complex forms for your users. At the top of your form builder are Control Options; these include standard features such as save, undo, redo etc. Some form fields have more in-depth options; refer to "6.0 Form Builder Index".



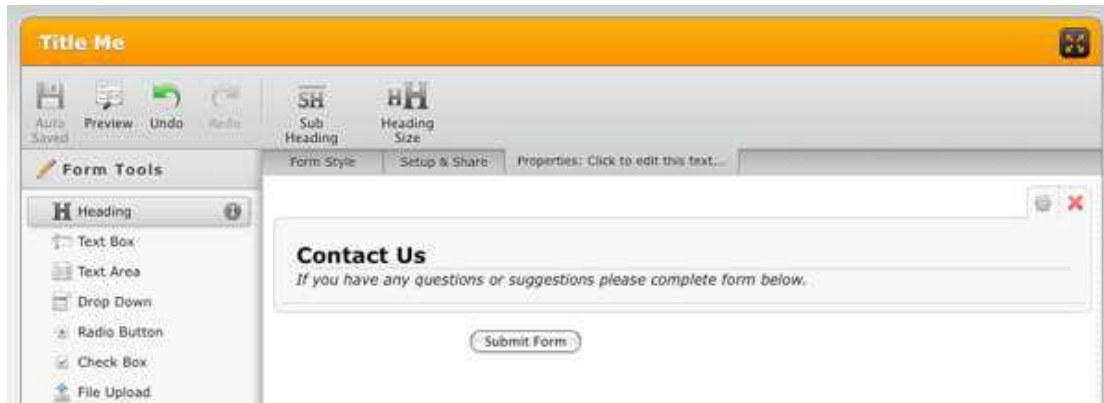
## 5.1 Form Tools

Form tools include straightforward fields, such as headings, text box, radio buttons etc.



### 5.1.2 Headings

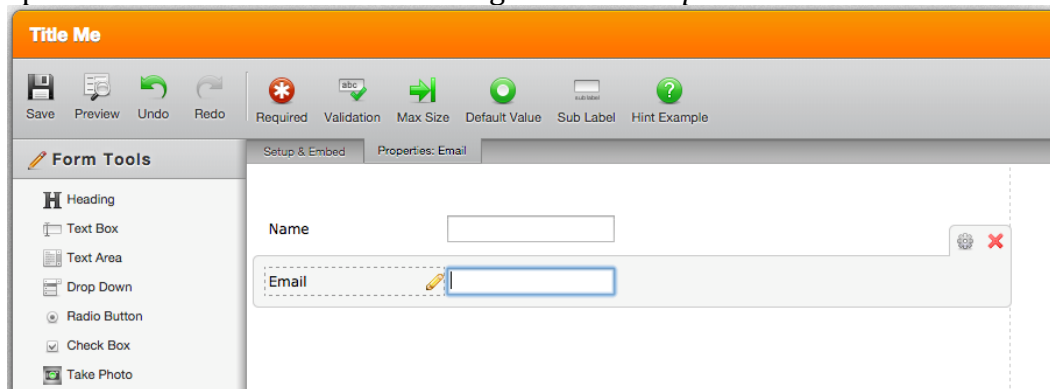
Headings state the purpose of your form. They can also be used to title different sections of a form.



- Use the Heading tool to place a brief description.
- Resize the heading or convert the heading into a Sub Heading using the *control options* above.

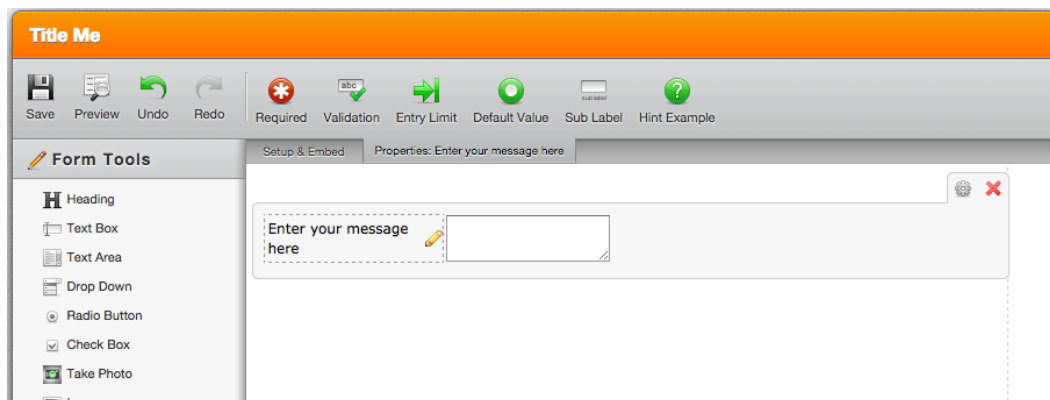
### 5.1.3 Text Box

Text Boxes are useful for short answers, such as name, email, number etc. Assign specific criteria for the answer using the *control options* above.



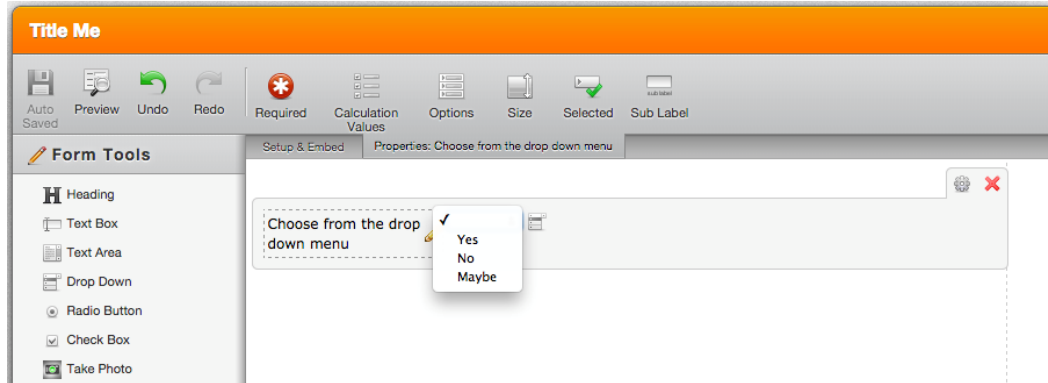
### 5.1.4 Text Area

Text areas are useful for long answers e.g. entering a description or message. Assign specific criteria for the answer using the *control options* above.



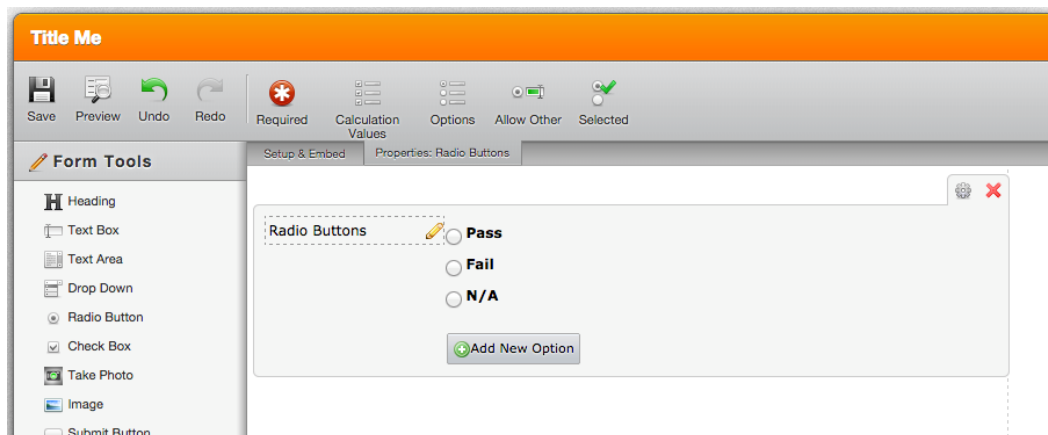
### 5.1.5 Drop Down

Drop Down menus enable users to select a value from a drop down menu. Drop Down menus are commonly used for single selection only questions e.g. yes/no/maybe.



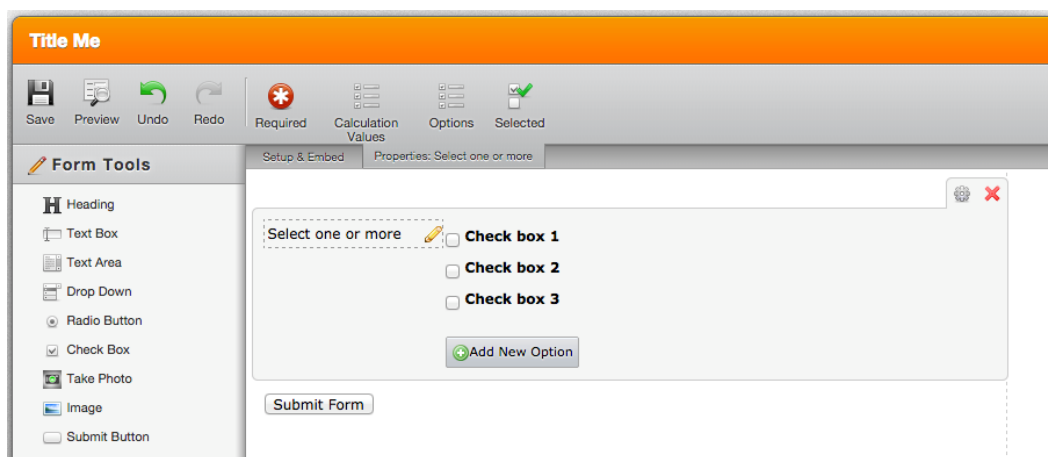
### 5.1.6 Radio Button

Radio Buttons are useful for lists of 2 or more options that are differ in value, users must select only one e.g. compliant/non-compliant.



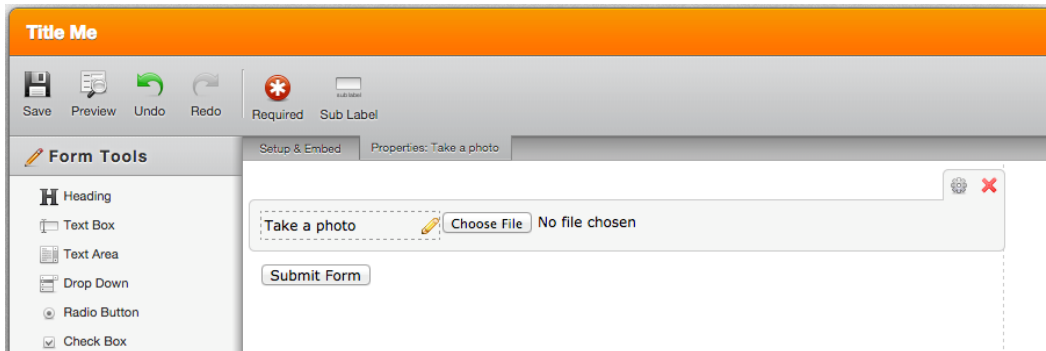
### 5.1.7 Check Box

Check Boxes are useful for multiple questions that belong to the same category. Users can select more than one if it applies to them.



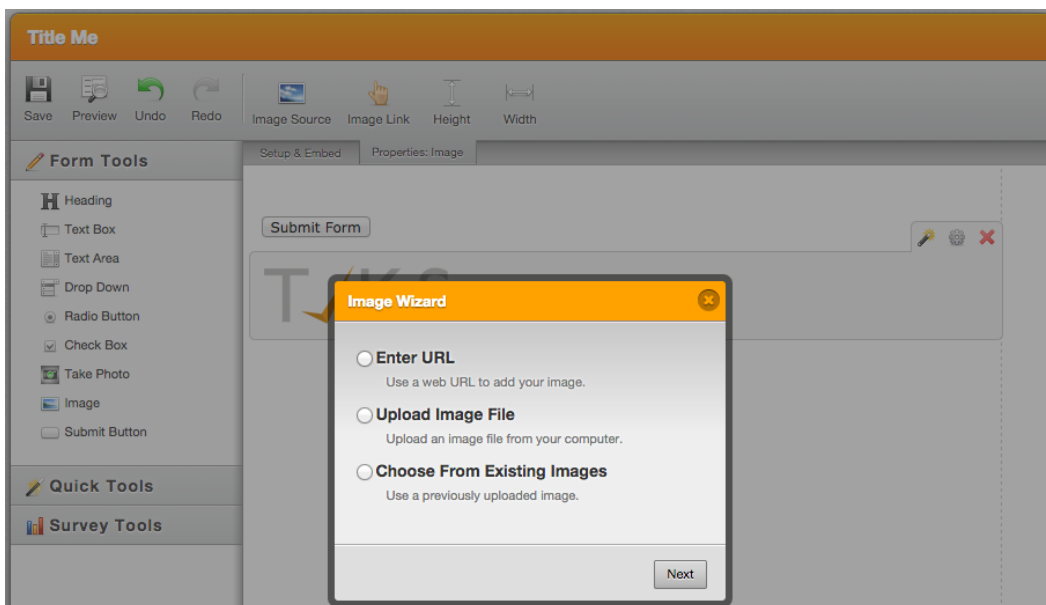
### 5.1.8 Take Photo

'Take photo' option enables users to capture photos using their mobile device.



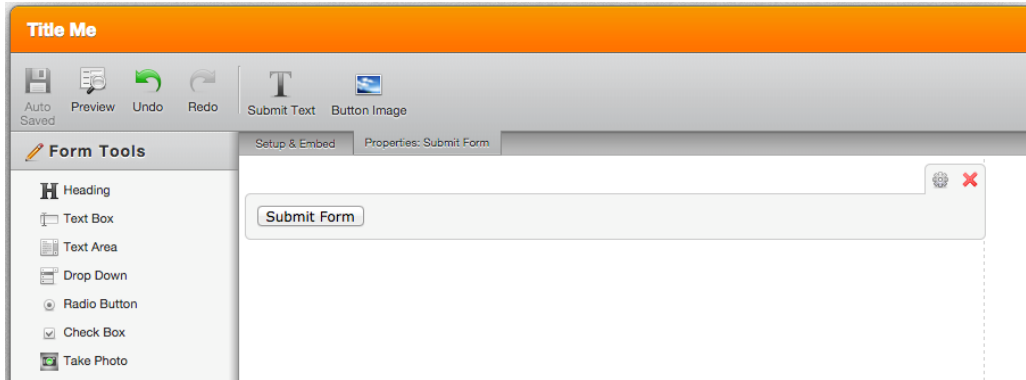
### 5.1.9 Image

Image Wizard enables you to add an image to your form. Images can be uploaded from a file, by entering an image URL, or by choosing from an existing image (previously uploaded).



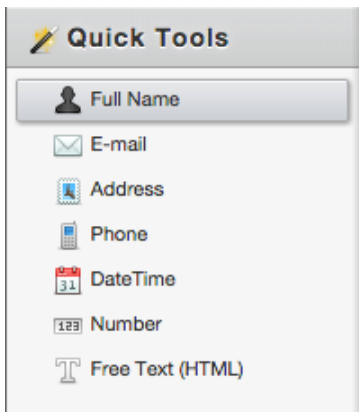
### 5.1.10 Submit Form

Marks where the form ends and lets the user submit the form. 'Submit' text can be altered and an image can be added by using the *control options* above.



## 5.2 Quick Tools

Quick tools are commonly used questions that enable you to create a form faster. You can choose to edit the pre-set questions, however this is optional.

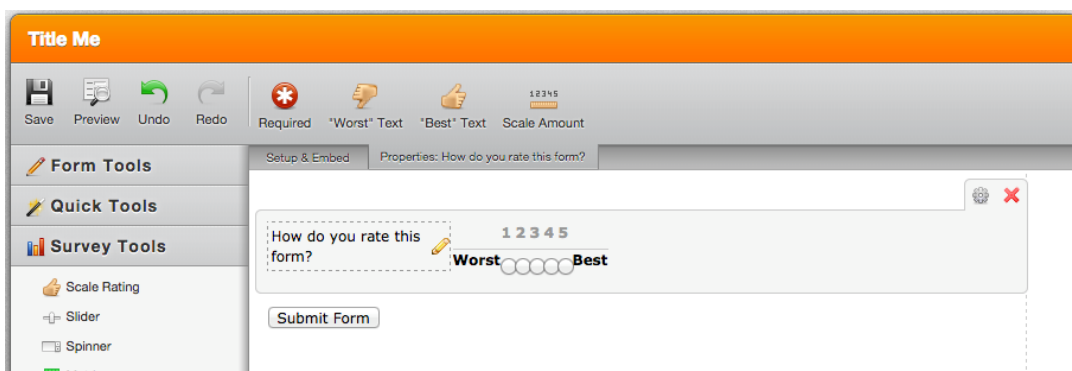


## 5.3 Survey Tools

Survey tools allow you to create questions that can measure users answers. Surveys can be used to collect information on a wide range of things, including personal facts, attributes, behaviour and opinions.

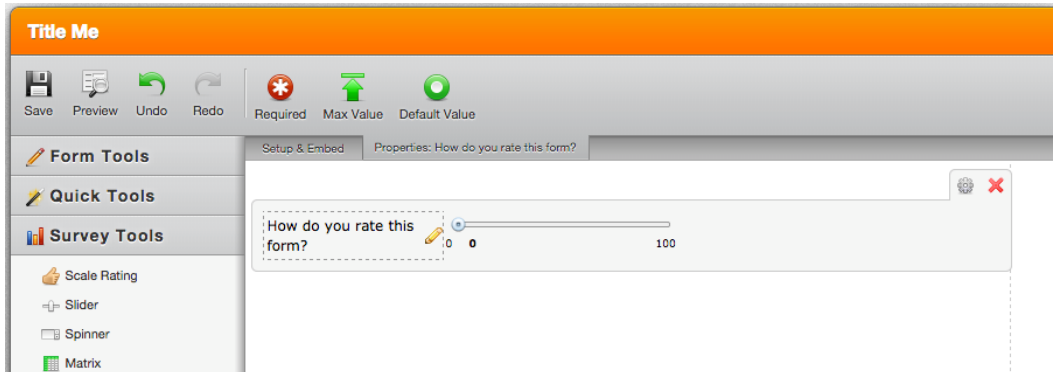
### 5.3.1 Scale Rating

Scale Ratings are used to indicate preference based on scale points. Lower numbers universally represent the worst and higher numbers represent the best.



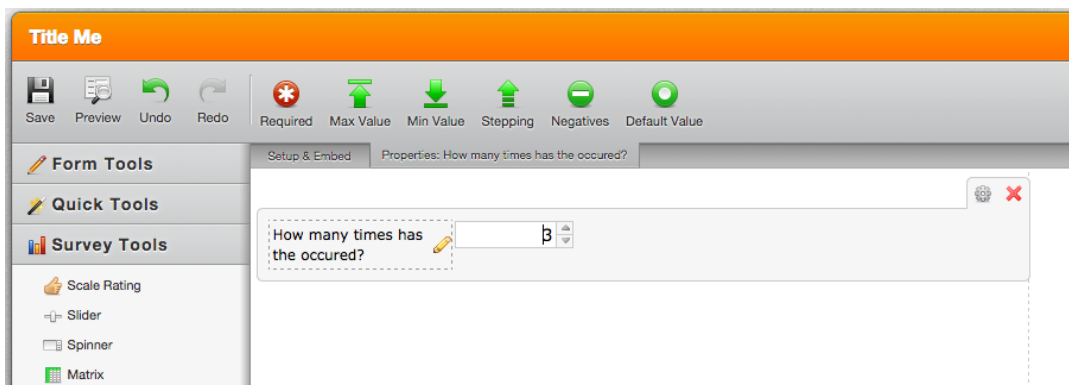
### 5.3.2 Slider

Slider scales enable users to indicate their preference using a draggable scale, rather than traditional scale points.



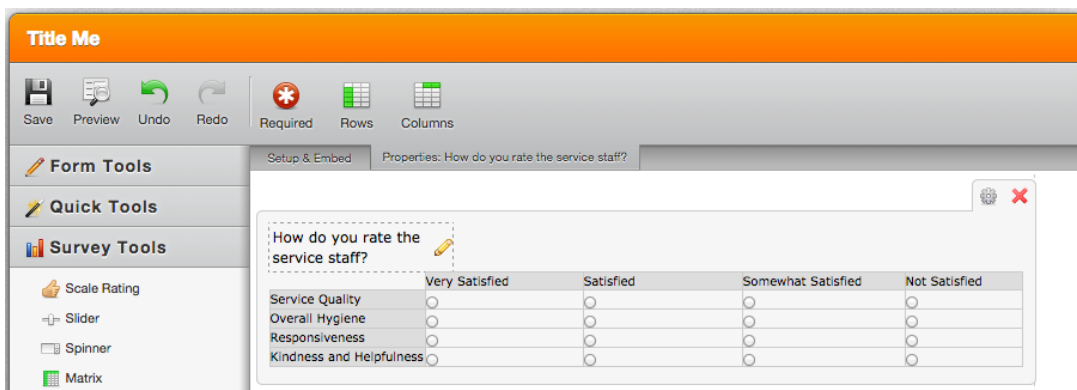
### 5.3.3 Spinner

The 'Spinner' tool measures numerical value. The *control options* at the top of the screen enable you to customise values and value stepping.



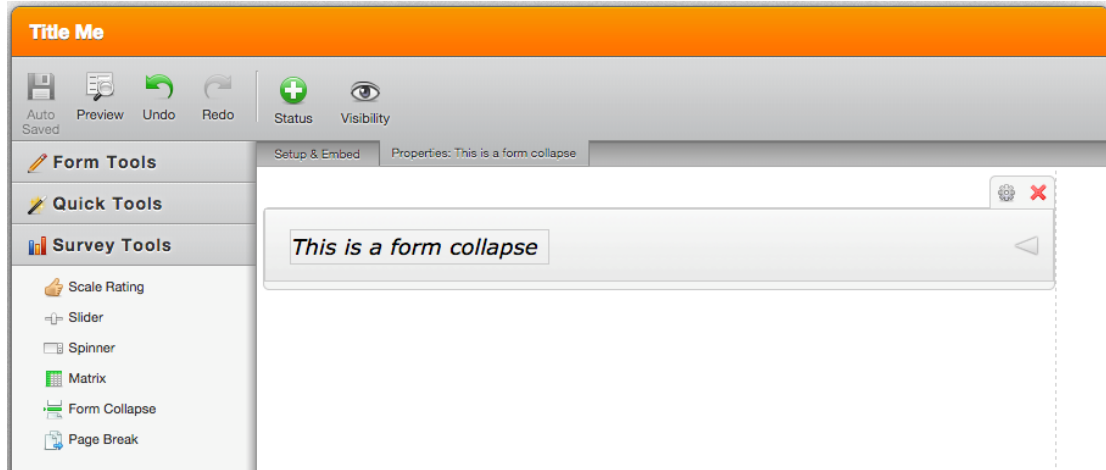
### 5.3.4 Matrix Scale

Matrix scales are used to indicate user preferences based on a series of predefined questions. Edit and add rows or columns using the *controls options* above.



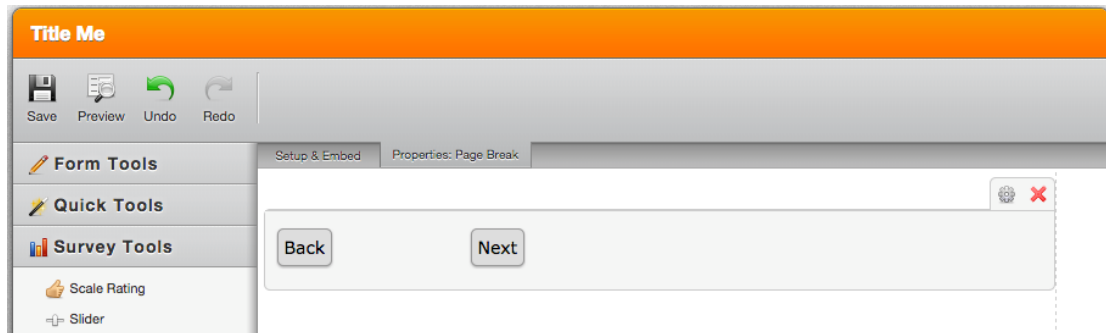
### 5.3.5 Form Collapse

Form Collapse hides and expands questions within your form. The *Status* option will pre-define Form Collapse to be either opened or closed. *Visibility* allows you to leave the form collapse visible or hidden to users.



### 5.3.6 Page Break

Inserting a page break signifies the start of a new page.



## 6.0 Form Builder Index

Save	Saves your form. Note the document auto-saves every 60 seconds.
Preview	Previews your form in a browser tab.
Undo	Undo's your last move.
Redo	Redo's your last move.
Required	A required question needs to be answered in order to move to the next page, or submit the form.
Validation	Assigns validation value to the question e.g. Must be entered as an email, numeric, alphabetic format.
Max Size	Assigns limit of characters e.g. up to a 10 digit mobile number must be entered.
Default Value	Assigns default value to question
Sub label	Optional, can be used to display a message underneath text box.
Hint Example	Hints an example if the user has entered a question incorrectly.
Calculation Values	Assigns value to corresponding answer. 1 is a pass, and 0 is a fail. Values are separated by rows i.e. 1 0 1
Options	Alter the option text. Options are separated by rows i.e. Option 1 Option 2 Option 3
Size	Size expands the visibility of drop down selections. Useful for large quantities of data.
Entry Limit	Limit entry by words or letters
Selected	Sets a pre-selection to a question