

flowtify

Manual for the mobile app

Version 8.0.4 Hackklotz

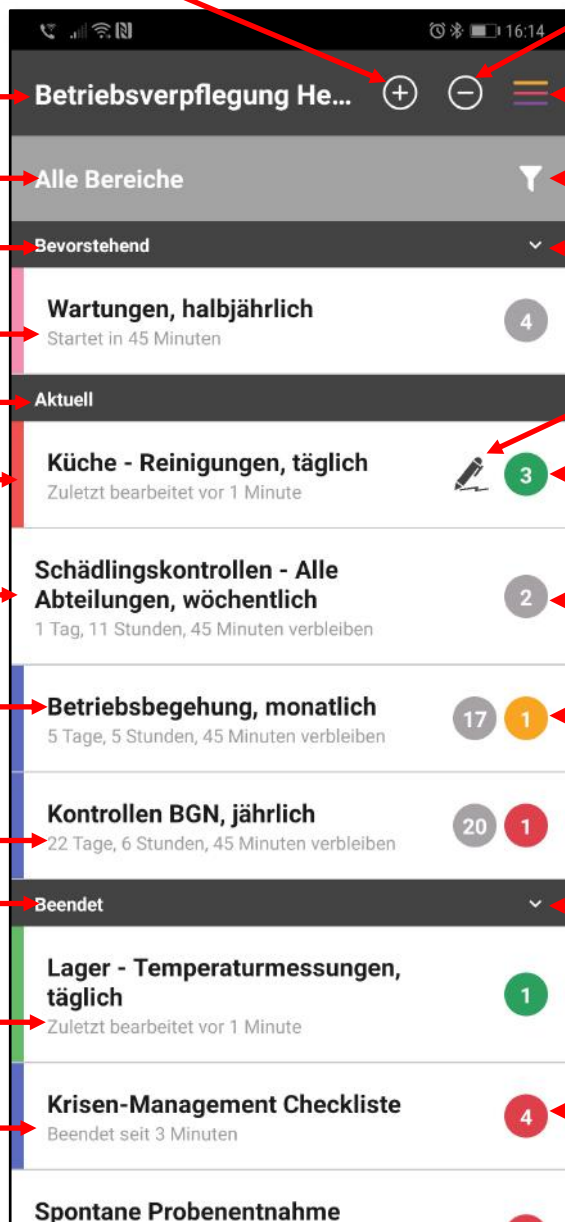
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Calling up checklists spontaneously

Deactivate checklists

Department name



flowtify menu

Filter checklists by area

Filter by area

Show upcoming checklists

Expands or collapses the "Upcoming" section

Countdown until the checklists can be used

Collective signature for checklist still pending

All currently published checklists

Colour coding of an area

Number of positive completed tasks

Checklist that is not assigned to a particular area (without colour)

Total number of unfinished tasks

Name of the checklist

Number of critical tasks

Remaining time to finish the checklist

Expired/Done checklists

Expands the "Expired" section

Processing still possible, but checklist has already been completed

Time since the processing is no longer possible.

Total number of problematic tasks

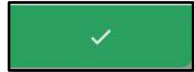
Meaning of individual buttons and displays



Red circle with a small "x" → to leave a window or dialogue
Alternative to Android's "Back" button.



Grey with check mark → Another action must be executed before the button turns to active.



Green with check mark → for successful confirmation of an action



Blue with arrow → another action follows before the task can be completed



Red with "X" → to report a problem. A reason/explanation must be given for the cause of the problem

Attention

- The red rectangle with the "X" is often mistakenly used to leave a dialogue (especially during follow-up-checks). This leads to unnecessary error messages in the administration. Use the small "x" in the circle to leave dialogues and tasks!
- We are already working on a graphic optimization to prevent this misunderstanding.

Practical examples can be found on pages 10 & 11



Rotated arrow → to reset a task whose value was entered incorrectly. Function is only available in certain screens.



Camera icon → for taking photos spontaneously



Speech bubble → for adding a comment; has no influence on the "completed" or "unfinished" status of a task



Shows the time within which a checklist has to be completed



Task with green background and check mark → Task completed successfully



Yellow highlighted task with warning sign → Task has a critical value

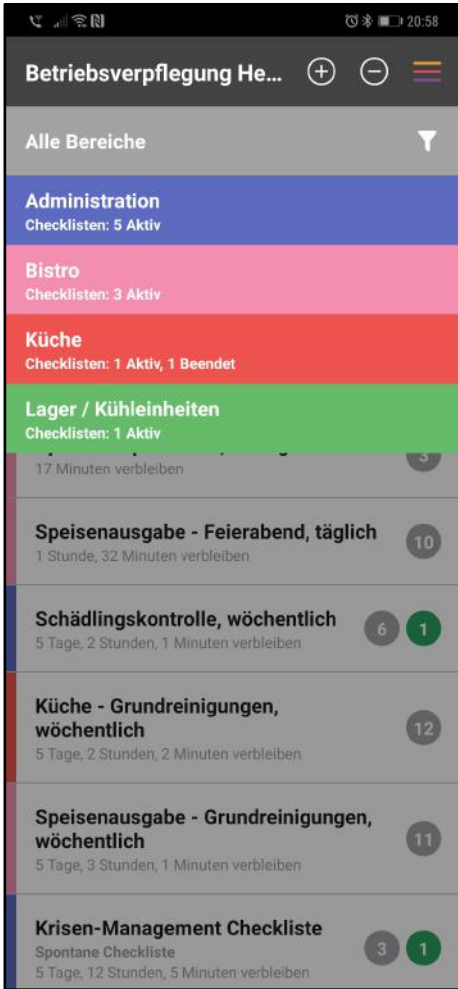


Task highlighted in red with an "x" → Task has a problem



Grey highlighted tasks with lock → Task has not yet been released for processing

Areas



By tapping on the funnel symbol you can display all available areas.

Select the desired area by tapping on the coloured area. Only the checklists that are relevant for this area will then be displayed.

You can change the area anytime by tapping the funnel symbol again.

Good to know:

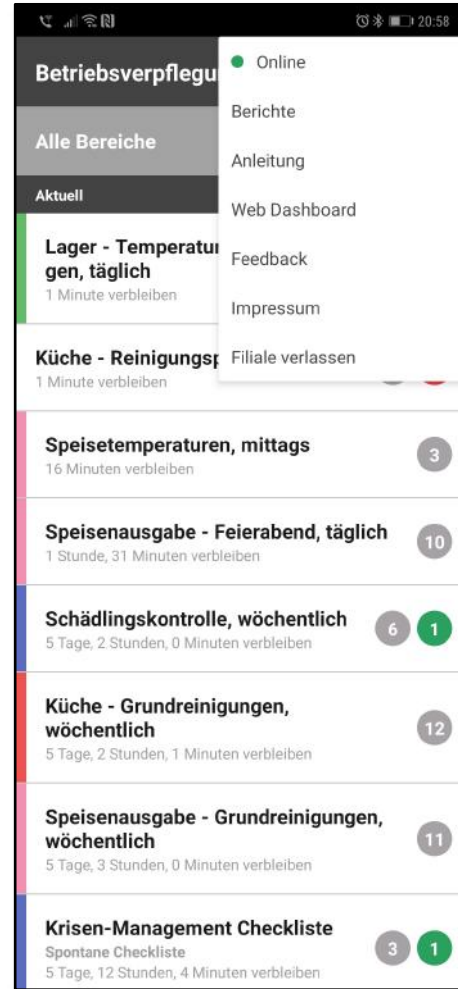
If the app is closed and reopened at a later time, the last selected area will appear.

If there are several tablets in operation, you can, for example, set the kitchen tablet to "Kitchen" and the bistro tablet to "Bistro" to make it easy for each department.

Info:

- Below the area name you can see how many checklists in an area are currently "active" or already "finished".

Menu



Tap on the three colored lines in the upper right corner to open the menu.

In the menu you can:

- see if the device is online or offline
- generate reports
- open the online manual
- go to the web administration
- send feedback
- view the imprint
- log off the device from the department

Good to know:

If unexpected problems should occur, check first whether your device is "online"!

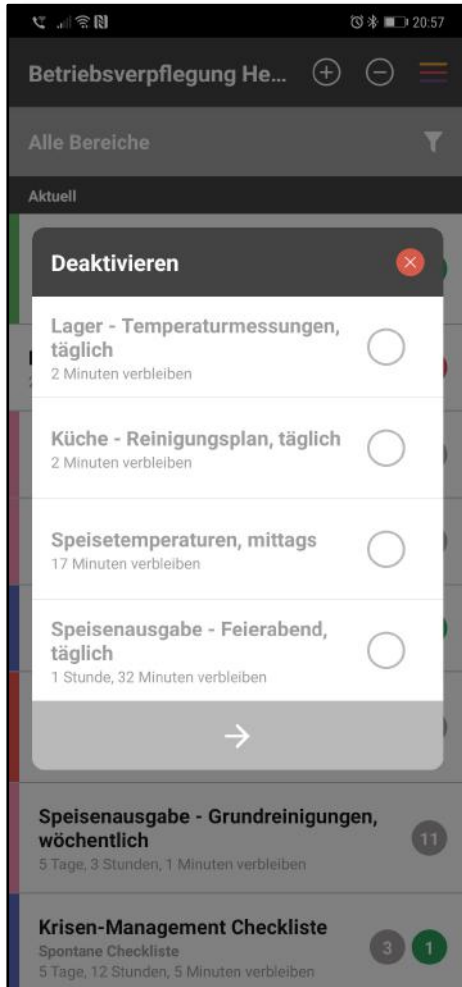
If it shows a status other than "green/online", this is most probably the reason for possible synchronization problems between the device and the server.

In this case, the first step is to reconnect to the Internet. This will solve most problems in a few seconds. Especially in terms of reports.

Info:

- Please also have a look at the online manual before using flowtify the very first time. We show you in less than 3 minutes the most important functions of the flowtify app in short animations.

Deactivation



By tapping on the minus symbol next to the menu selection, you can either deactivate entire checklists or individual tasks.

When should I "disable" tasks or checklists?

Always when, for a legitimate reason, the task or checklist cannot be completed before it expires!

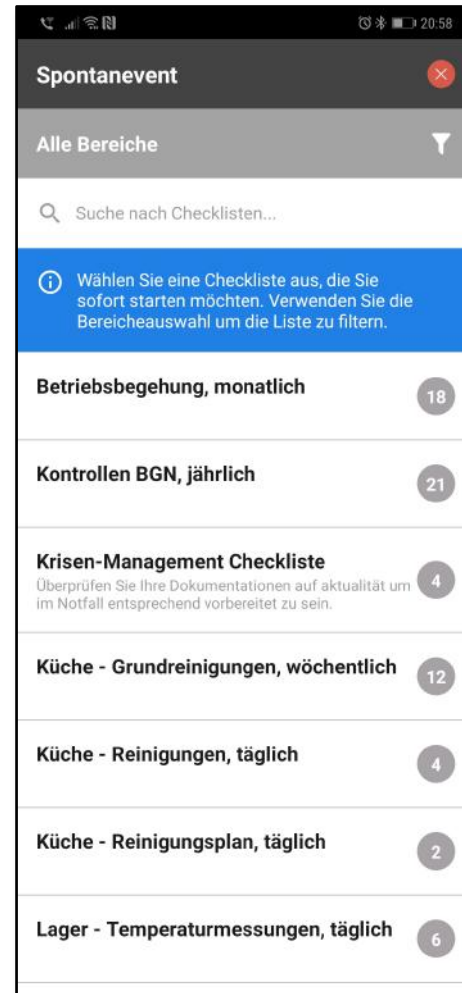
What do I have to do to deactivate a task or checklist?

- When you tap on the minus button, you will receive a selection of all tasks or checklists currently possible to deactivate.
- Select one or more by clicking
- Then tap on the blue arrow
- Enter the reason why the task or checklist should be deactivated.
- Select the blue arrow
- Now enter your name and signature and confirm with the green button

Info:

- By "Deactivating" you prevent that "unfinished" checklists or tasks will pop up in the administration. The deactivation shows that you have not simply forgotten the tasks or checklists, but that you had a good reason for doing so!

Spontaneous Checklists



By tapping on the plus symbol you get a selection of checklists for spontaneous activation.

You can either search for a specific checklist or use the filter to reduce the selection accordingly.

When should I open tasks/checklists "spontaneously"?

Whenever there are activities that cannot be planned regularly, such as irregular goods deliveries or unplanned physical-sample drawings that need to be documented.

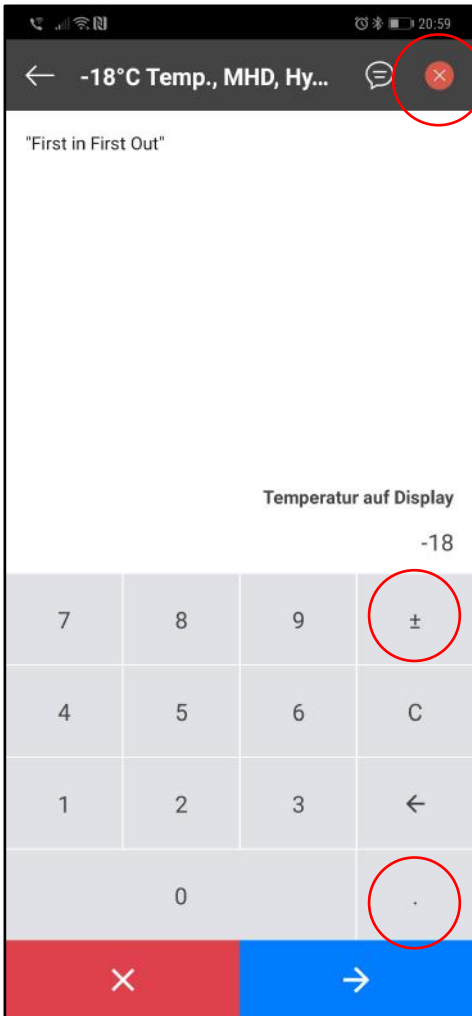
What do I have to do to start a checklist spontaneously?

- Tap the plus button
- Select the desired list
- Confirm the selection by tapping on Start
- Now the checklist with the note "Spontaneous checklist" appears in the "Current" overview and can now be handled normally

Important:

- "Spontaneous checklists" can only be started with an existing internet connection.
- The administrator defines the runtime of a spontaneous checklist.

Temperature Input



If you are prompted to enter a temperature, please note the following:

Make sure that you have entered the correct sign and decimal places!

The correct input of the sign:

- You can change the sign by tapping the \pm symbol. It does not matter whether you enter a number before or after it.

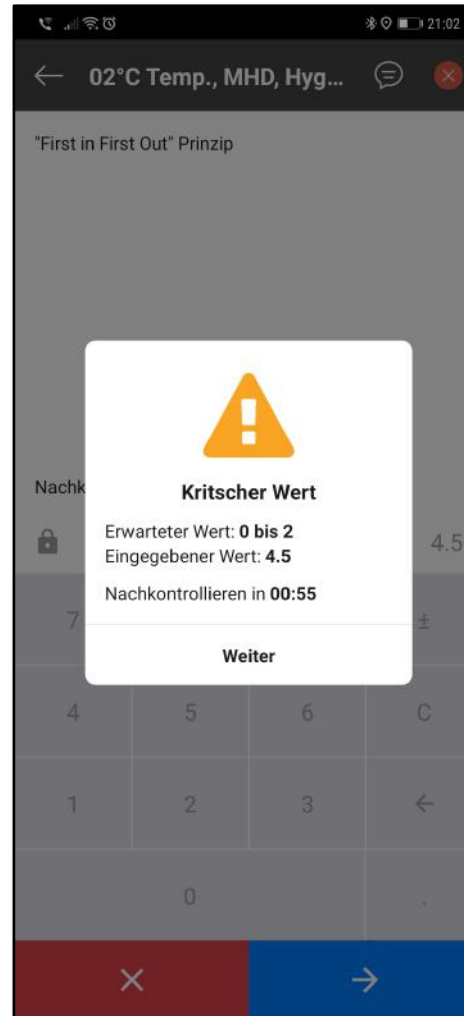
The correct input of the decimal place:

- After you have entered the numbers before the decimal point, tap on the dot symbol on the lower right of the keyboard, next to the zero.
- Now you can enter the corresponding decimal places.

Important:

- The large red X at the bottom left of the screen is not intended to leave or cancel the input. This is done via the small "x" in the upper right corner. Alternatively, you can use the Android-typical backspace key.

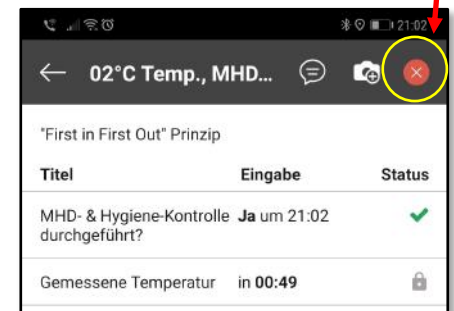
Critical Values



If you are prompted for a follow-up-check due to a temperature deviation, you will see this dialogue.

What do I have to do for follow-up-checks?

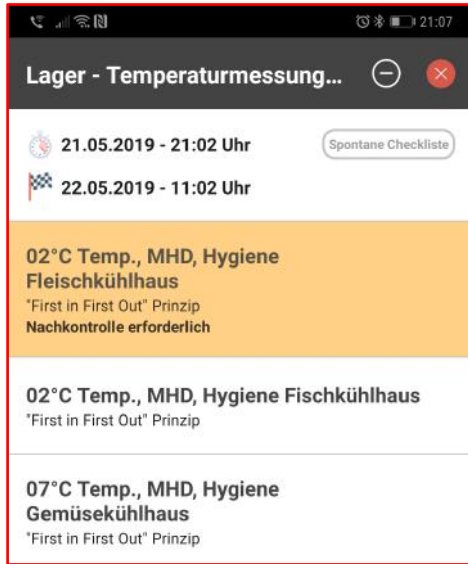
- Tap on "Next" to leave the dialogue.
- In the overview that is displayed, you can see the countdown to the follow-up check as well as a grey lock indicating that no processing is currently possible.
- Tap on the small "x" in the upper right corner to continue with other activities in the meantime.**
- You will be reminded automatically as soon as the final measurement can take place.



Important:

- The large red "X" at the bottom left of the screen indicates that tasks are "problematic". However, this would be wrong at the moment, since the re-measurement should be carried out first!

Follow-up-Checks



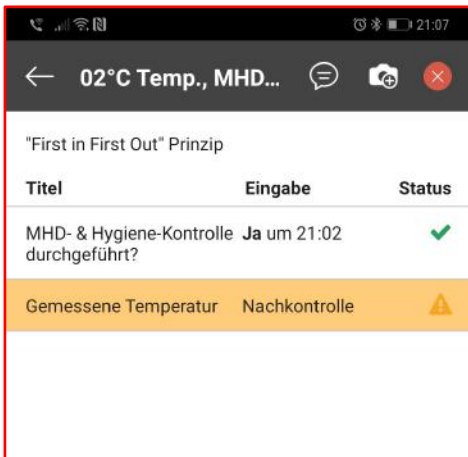
If a final measurement is due, you will be informed by an alarm clock and a yellow flashing note in the title of the corresponding checklist as well as in the title of the corresponding task.

How does a follow-up-check work?

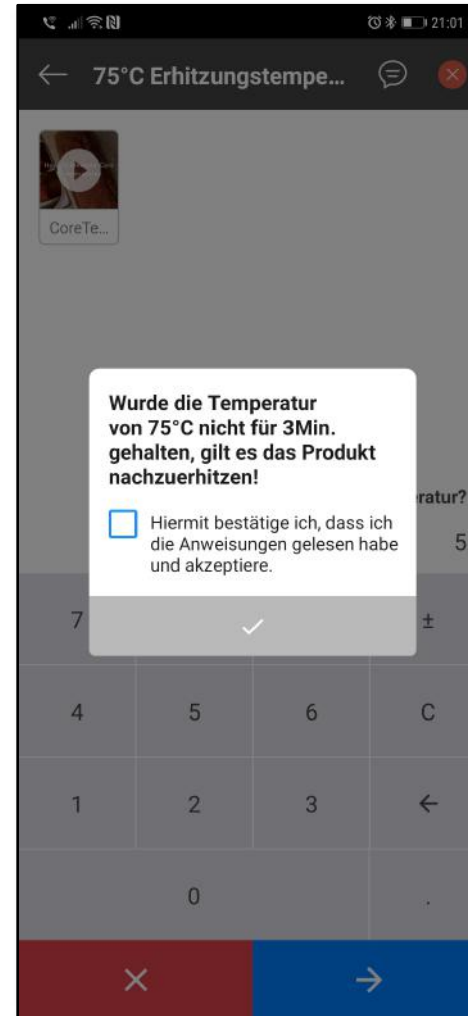
- Tap either "Go to task" or "Later" in the alarm clock.
- If you have selected "Later", you will see a yellow blinking title of the checklist and task until you have edited the task again or until its time has expired.
- Select the task as usual and enter the measured value.

Important:

- If the new value corresponds to the expected value, the task is marked "green/done".
- If the value deviates again from the expected value and there are no further measurements, either an action instruction appears, or the task is marked as critical (yellow) and you do not have to do anything else.



Instructions



Instructions for action can appear as a result of deviations from the expected results value. It is intended to support you in the further handling of a task.

What to do with instructions?

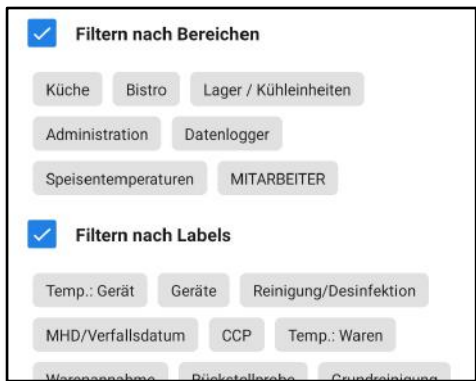
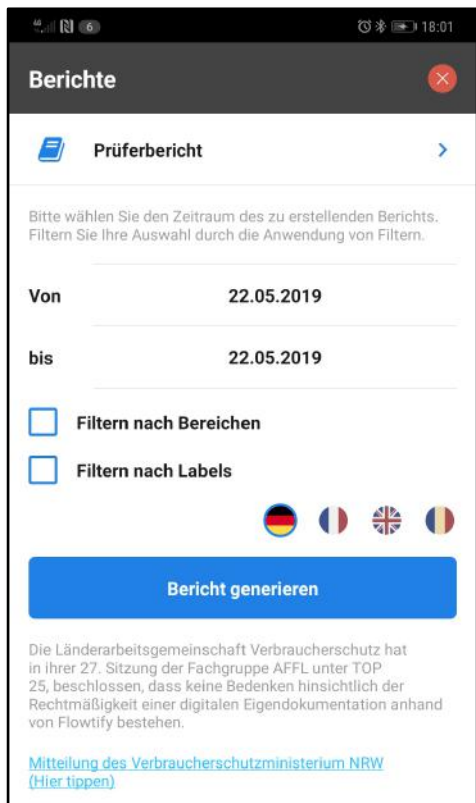
- Read the information displayed carefully
- Confirm that you have read and understood the information by checking the blue box and then on the blue check mark.
- Now enter the action you have taken. This should result from the action instruction. Then select the blue check mark.
- The task or the individual confirmation type within the task is now marked as critical (yellow).



Important:

- It can also contain individual sub-items of a task, follow-up-checks or instructions for action - the principle is the same every time.

Generate Reports



You can access the same reports on mobile devices as on the Web Dashboard.

Important:

- **A prerequisite for calling up reports is an existing internet connection.**

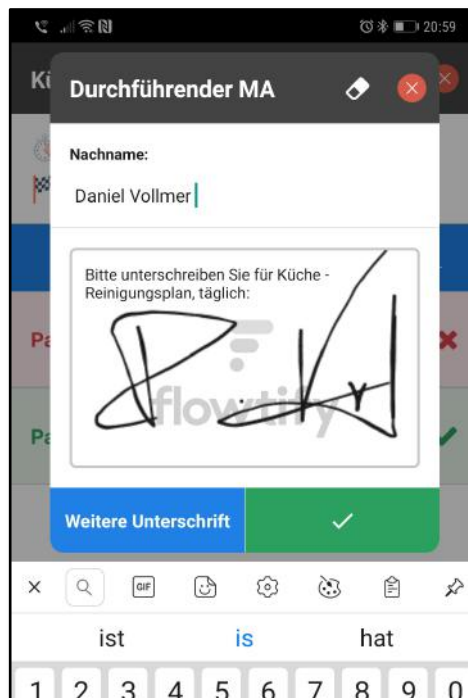
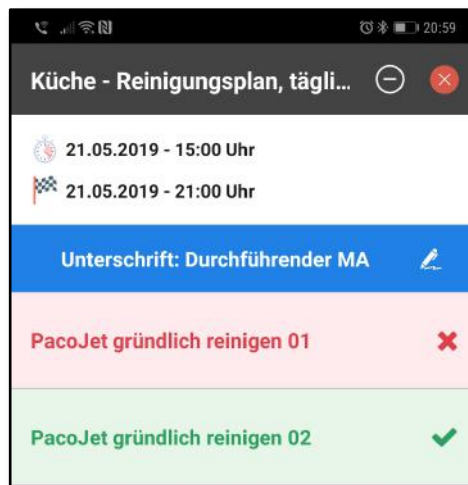
How do I generate a report?

- Tap on the three colored bars at the top right to open the menu.
- Select "Reports"
- Now the view you see on the left will open
- There are different setting options here:
 - First select the report type. The "Assessment Report" is activated by default.
 - Specify the time period that the report should cover.
 - Now you can, depending on the type of report, use filters to reduce the amount of results to the desired topics

Good to know:

- Via "Filter by labels" you can, for example, only display tasks that have a certain label, like " CCP".

Collective Signatures



Collective signatures can be requested after the last task in a checklist has been completed.

It does not matter if one or more tasks were successful, problematic or critical! It is only a matter of documenting the actual status of a list after completion.

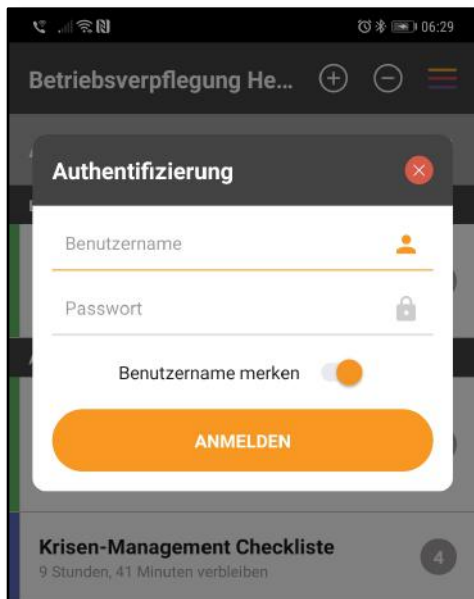
How do I sign a collective agreement?

- As soon as the last task in a checklist has been completed, a blue field with a pencil symbol appears.
- Tap on the blue field
- Depending on the setting, you will first be prompted to enter a text, such as your first & last name and then sign the form. Alternatively, only one signature can be requested.
- Confirm the dialog with the green check mark.

Good to know:

- Collective signatures can still be made up to 12 hours after completion of a checklist. If this is necessary, open the "Finished" section. For all checklists that show the pen symbol, no collective signature has been provided yet. You can do this now!

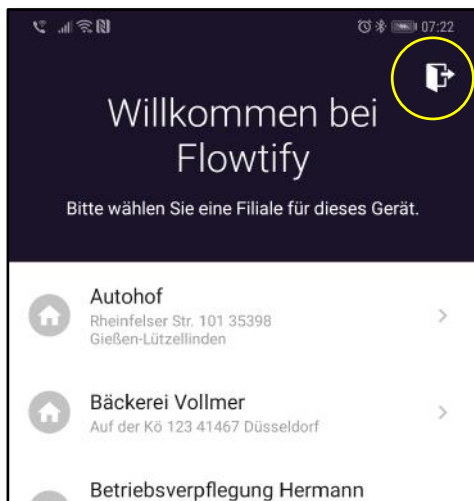
Login/Logout of Devices



In case you want to log in or out of the device, proceed as follows.

Logout of the device:

- Open the menu in flowtify (the three coloured bars at the top right)
- Select "Leave department"
- Now you can see the dialogue as shown here
- Enter the user name and password with which the device was currently logged in
- Select "Login"
- In the following dialogue you will see an overview (similar to the one below)
- Select the door with the arrow to log out of the device



Login device:

- In the dialog shown above, enter the user name and password
- Select "Login"
- In the following dialog you will see an overview (similar to this one)
- Select your department by tapping on its name
- All data for your department will then be loaded

Important:

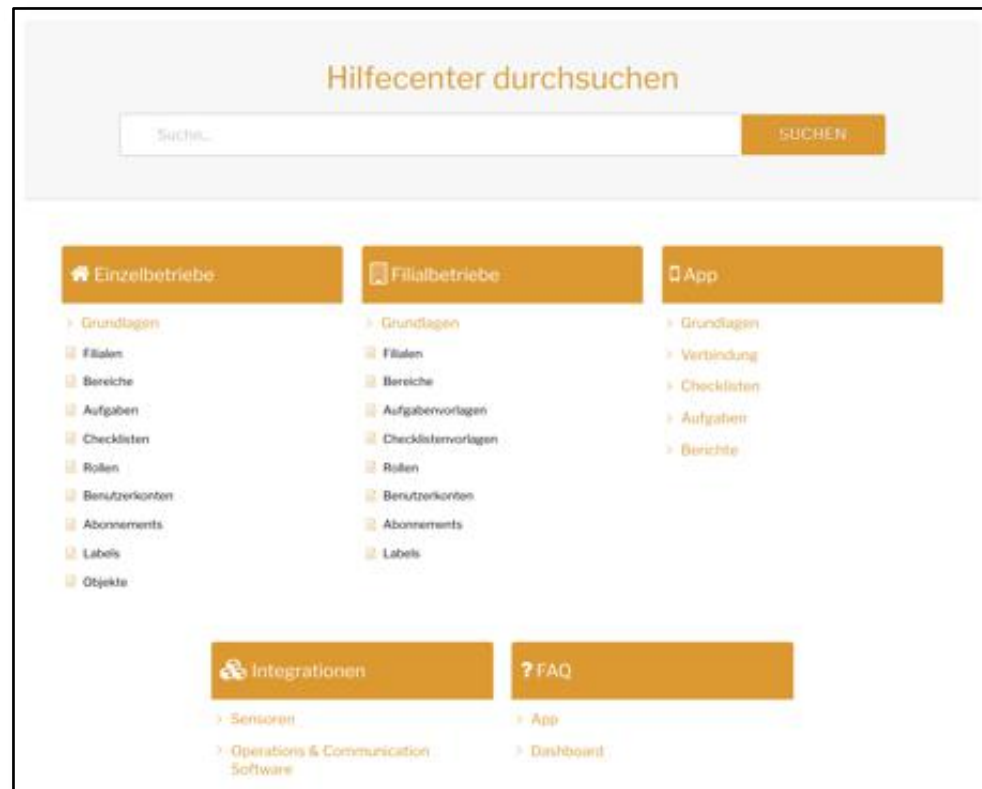
- **Login/logout only works with a working internet connection.**
- **Please ask your superiors for username & password.**

flowtify Knowledge Base

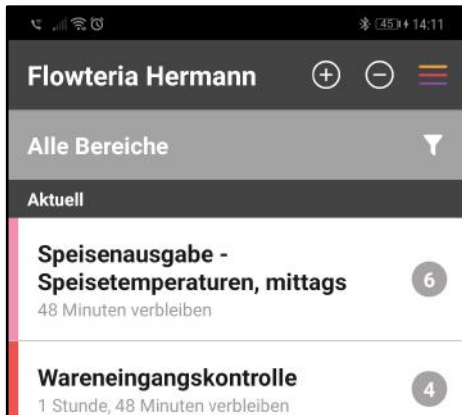
If you have further questions about flowtify, you will find more information in our help center. The help center offers help for the app as well as for the Web Dashboard.

If you are already in the Web Dashboard, you will find a link to the help center in the menu bar on the left. Alternatively, you can enter the following address in your browser:

<https://flowtify.de/knowledge-base/>



Practical Example 1: "No Delivery Today"



It sometimes occurs that deliveries are cancelled, for instance, due to public holidays.

How do I document correctly in this case?

Possibility:

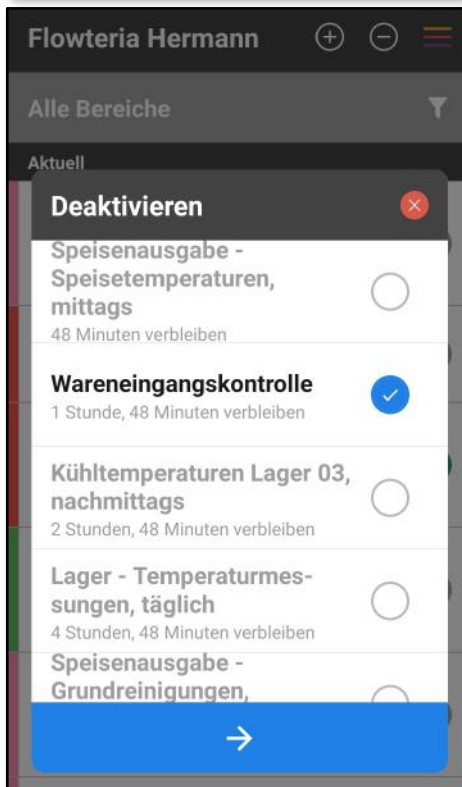
- Deactivate a checklist or task via the minus button. Enter "No delivery" as reason, for example. See page 4 "Deactivate".

Good to know:

- If the delivery arrives one day later, but the checklist for the delivery is not open, you can spontaneously open the checklist for the acceptance of goods via the plus button. See also page 4 "Spontaneous checklists".

Important:

- The goal should always be to ensure that no checklists run as unfinished business! This leads to unnecessary work in the administration, since first of all "why hasn't it been done" has to be researched.
- If a task or checklist cannot be completed on time, you always have the possibility to deactivate the checklist with an appropriate reason.



Practical Example 2: "Wrong Number Input"



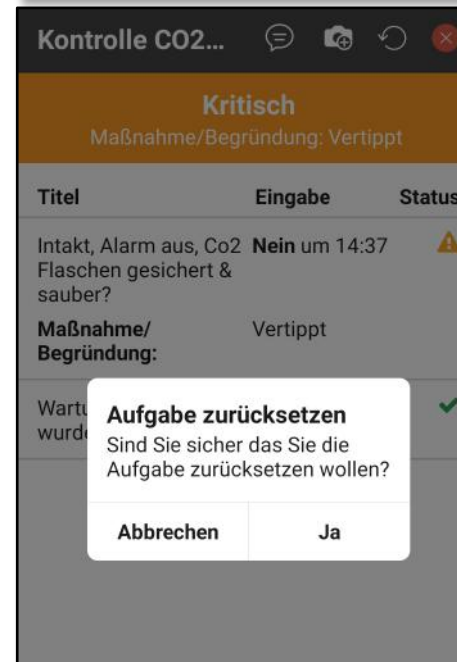
In the buzzing daily business it can happen that you make mistakes when entering temperatures or yes/no confirmations and thus by mistake produce critical values.

How can I cancel my entry in this case?

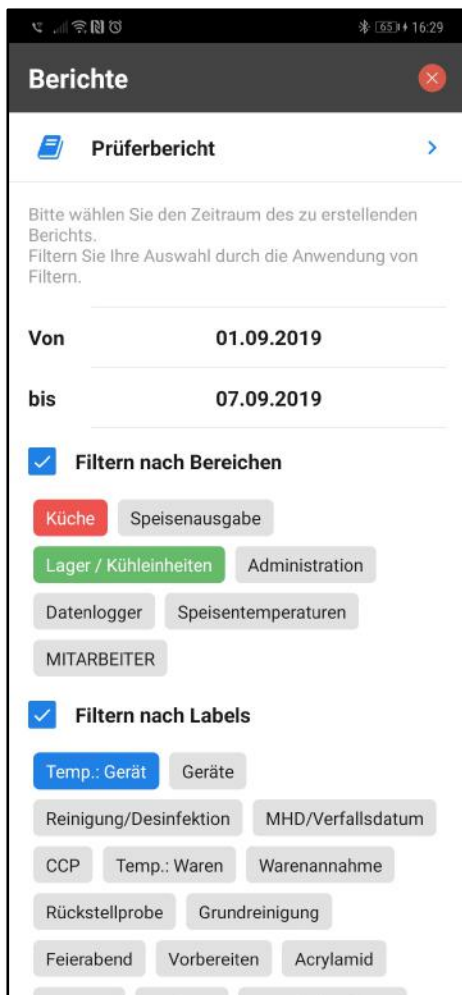
- Reset the task using the rotated arrow.

Important:

- A task can only be reset as long as there is still time for processing.
- For temperature inputs, you can only reset tasks after the final measurement! This can take up to 20 minutes.



Practical Example 3: "The Auditor is here!"



As it is known, visits are carried out by the veterinary office and service providers without prior notice.

If no responsible person with access to the Web Dashboard is on site during a visit, you as an employee can also generate the desired reports via the app.

Please have a look at "View reports" on page 7. It explains how to create reports.

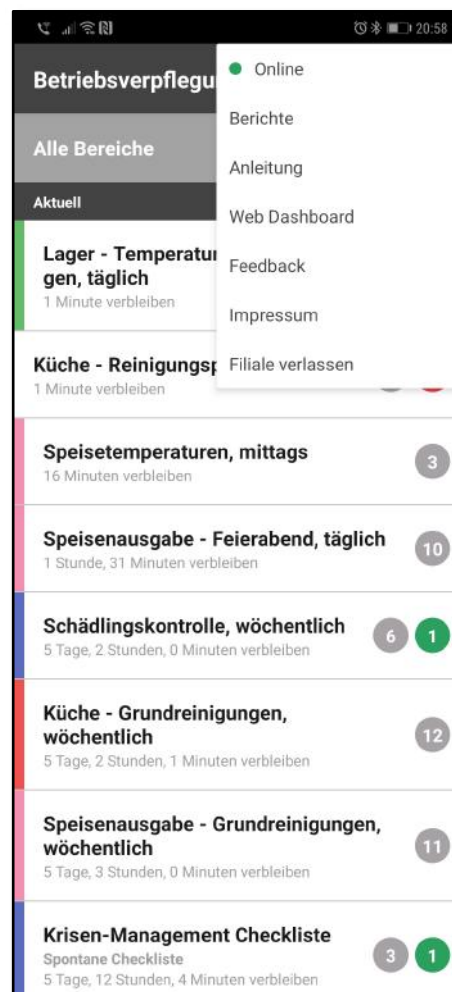
Good to know:

- If the inspector only wants to check individual inspection points in an area, such as "Kitchen" and "Storage / Cooling units", the area filter is suitable.
- Use the "Temp.: Device" label to call up all tasks related to the cooling units.
- If you now generate a report, you will only have displayed those tasks that correspond to one of the two areas and the label.

Info:

- The "assessment report" is the most compact type of report. It is the fastest to generate, even with a weak internet connection, because it is reduced to the essentials.

Practical Example 4: "Done on Tablet but not in Report"



Under certain circumstances, the information on the tablet may reflect something other than what colleagues see in reports or email notifications.

There is usually a relatively simple reason for this:

One or more tablets of a company have not yet been synchronized with the server!

What do you need to be aware of in this case?

- First, check whether all devices in the menu are set to "green/online".
- If this is not the case, the device is offline and has not yet connected to the server in order to exchange data and synchronize with the web dashboard and other connected devices. Please consult your IT department in order to establish a working internet connection.

Important:

- In case of problems it is recommended to simply restart the tablet!