

# GREENLIGHT QC OFFICE USER GUIDE



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## ABOUT GREENLIGHT QC

Greenlight QC is a comprehensive technology solution for managing product quality and facility checks.

The solution has a number of component parts designed to meet specific functions. The main components are Greenlight QC Office and Greenlight QC Mobile.

### GREENLIGHT QC OFFICE WEB

Greenlight QC Office is a web-based solution where users with the appropriate permissions can login via the internet to manage QC Assessments and set the parameters by which a check will pass or fail; set up Users; update User Permissions; set up Alerts and view QC Check reports in real time.

### GREENLIGHT QC MOBILE APPLICATION

Greenlight QC Mobile is the portable component of the software. It can be synchronised with Greenlight QC Office to allow for active QC Checks to be made. QC Checks can be performed at remote site locations and the data synchronised in real time or at a future point in time, depending on connectivity available.

Specifications, guidance and visual references are displayed at question level giving support to the user in completing the QC Check. Supporting evidence such as digital pictures can be attached to QC Checks.

Please see the Greenlight QC Mobile User Guide for more information.

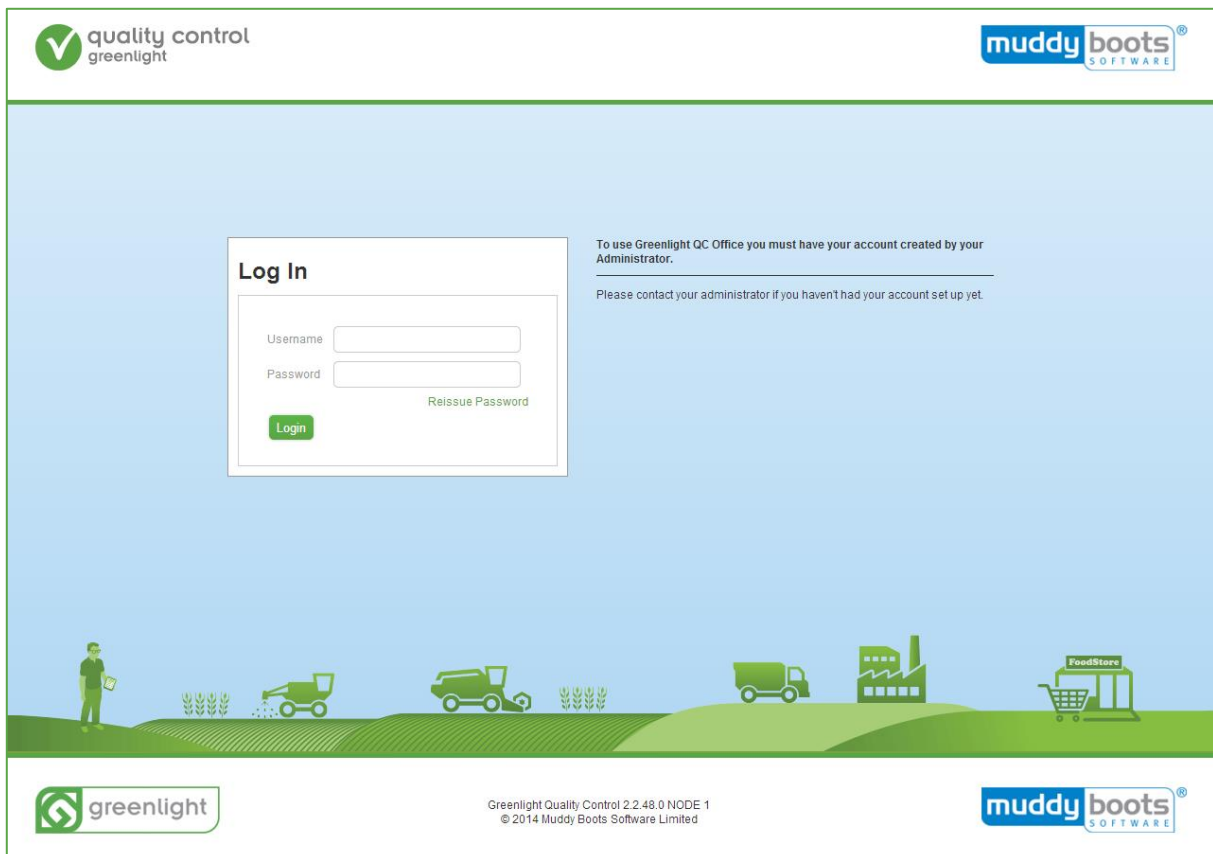
## GETTING STARTED

### LOG IN AND YOUR PROFILE

Use your web browser to navigate to the Greenlight QC Office website.

**Please note:**

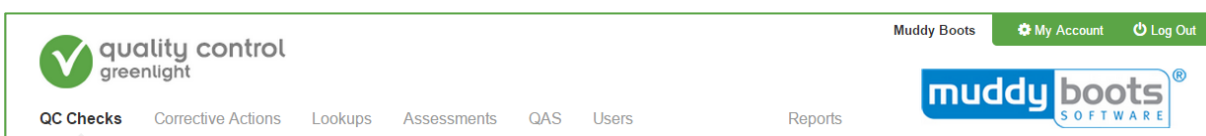
- Internet Explorer 11 and the two latest versions of Firefox and Google Chrome are supported.
- Earlier versions of Internet Explorer are not supported; avoid using those browsers.
- Enter your username and password and click **Login**.



If you have forgotten your password, you can reissue it by clicking the **Reissue Password** link on the login screen.

To log out, click **Log Out** in the top right of the screen.

If you wish to update your details, including your email address and password, go to **My Account** in the top right of the screen.



Search for... Home

---

**User Profile**

Full Name:

Position:

Mobile:

Home Page:


Favourite Pages:

- 
- 
- 
- 
- 

**Restricted Details**  
For security reasons, you must enter your current password to make any changes to your email address or your password.

Current Password: 1

Email:

New Password: 2  

Confirm Password: 2

Greenlight Quality Control 2.2.107.28 NODE 1 © 2018 Muddy Boots Software Limited

**\* Please Note: The password must be at least seven characters and consist of one upper case letter, one lower case letter and one number or non-alphanumeric character (e.g. a ?). It will expire after 180 days and therefore, require updating.**

**Please note:** If you are logged on using one computer and try to log on at a different computer, you will be logged out from the first computer and a warning message will be displayed.

### COMMON SCREEN USABILITY FUNCTIONS

Screens within Greenlight Office share many common functions, however screens are being redesigned on an iterative basis and there may be some differences. The menu along the top of the screen allows you to navigate around the system. Each option has a submenu to choose where you go in the system.

At the top left of some screens is a search box allowing you to search for a screen name rather than locating it in the menu.

Many screens show grids where data is displayed in rows. Beneath most grids are fields allowing you to add a record by entering data and clicking a save button at the bottom.

Grid data can be edited by clicking the edit button next to a row on the left hand side. The data will show in the boxes below the grid allowing it to be edited. When editing is complete, you can click the update button at the bottom to update the data.

## Typical Screen Layout

**Question Administration**

Edit	Question	Assessment Section	Data type	System lookup	Custom lookup	Question level	Question Group	Question
	% Damage Defects	<input type="checkbox"/>	Numeric (Integer)					
	% Dehydration Defects	<input type="checkbox"/>	Numeric (Integer)					
	% Half Leaf Defects	<input type="checkbox"/>	Numeric (Integer)					
	% Leaf size/ stem size Defects	<input type="checkbox"/>	Numeric (Integer)					
	% Packs	<input type="checkbox"/>	Numeric (Integer)			None		
	% Pieces	<input type="checkbox"/>	Numeric (Decimal)			None		
	% Wetness Defects	<input type="checkbox"/>	Numeric (Integer)					
	1. Bread Wt Minus crumb loss (g)	<input type="checkbox"/>	Short text			None		
	1. Total Bread & Butter Wt (g)	<input type="checkbox"/>	Numeric (Decimal)					
	1. Total Butter Wt (g)	<input type="checkbox"/>	Numeric (Decimal)					
	100g	<input type="checkbox"/>	Numeric (Decimal)					

Page size: 20 | 970 items in 49 pages

Show system questions

**Add A Question**

Question:  Quick guidance:

Assessment Section:  Question tags:

Data type:  Assessment type:

System lookup:  Default question:

Custom lookup:  Hide:

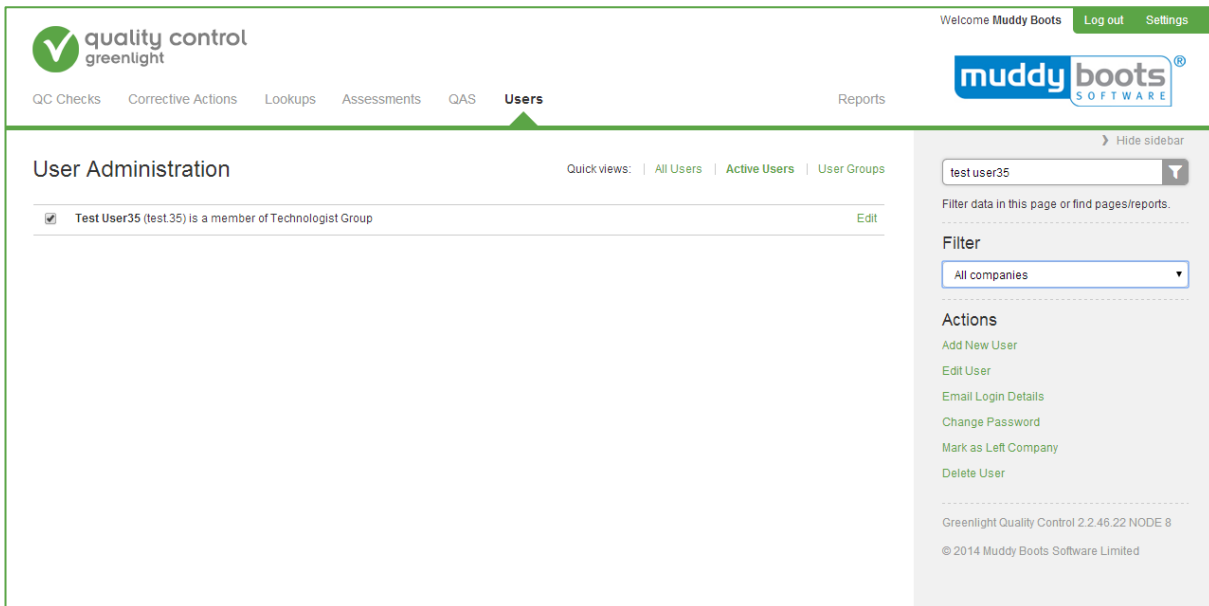
Question level:  Question Group:

Question Sub Group:

Data within grids can be filtered by right-clicking on the column header and selecting a filter. You can choose your filter options and click **Filter** to apply to the column.

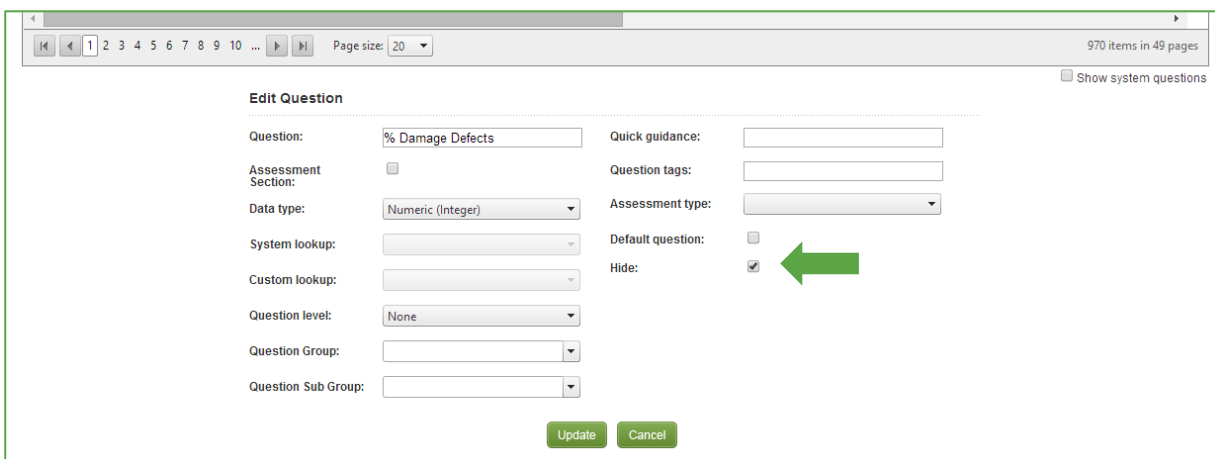
You will also see screens where you can search the records in the screen using a search box on the top right.

You can also use filters and quick views to sort the records, while there will be a list of actions you can undertake. You may need to select the record before you choose the action you want to apply.



### IMPORTANT POINTS BEFORE YOU BEGIN

Many grids contain delete buttons on the far right of each to allow you to delete records. It is generally NOT advisable to delete rows, as this may remove data from previously completed Assessments; instead, **Hide** the data. To do this, click to edit a record, tick the Hide check box, then click Update. This allows the information to remain within the system but no longer be viewable.



**Please note:** Some grids (e.g. **Question Administration**) contain a column titled 'In Active Assessments', which enables you to see how many active assessments the item is being used in to inform you of whether the record should be hidden or deleted.

Assessments must be checked out to you to work on them. An assessment can only be checked out to one user at a time. Please see the section on **Assessments > Check out an Assessment** for more details.



**Please note:** Reports are generated in pop-up windows as PDF documents, so please be sure these are allowed (in your web browser's settings) for this website to enable you to view reports.

## RECENT ACTIVITY SCREEN

The first screen you see when you log in is the **Recent Activity** page. This automatically displays recent announcements, such as new release information, rejections, corrective actions and recent QAS activity (if applicable). Use the quick views at the top of the grid to change your view.

quality control greenlight

Welcome Muddy Boots | Log out | Settings

QC Checks | Corrective Actions | Lookups | Assessments | Users | **Reports**

### Recent Activity

All | Announcements | Rejections | Corrective Actions | QAS

ACTIVITY	DETAILS	VIEW
REJECTION	21/08/2014 09:03 Intake - [redacted]	View
REJECTION	was rejected on 20/08/2014 16:29 Intake - [redacted]	View
REJECTION	was rejected on 20/08/2014 16:16 Intake - [redacted]	View
REJECTION	from [redacted] was rejected on 20/08/2014 16:13 Intake - [redacted]	View
REJECTION	from [redacted] was rejected on 20/08/2014 15:53 Intake - [redacted]	View
CORRECTIVE ACTION COMPLETED	High priority Corrective Action for srf was completed on 14/08/2014 11:02 sfd: sweff	View
CORRECTIVE ACTION COMPLETED	Unknown priority Corrective Action for test was completed on 14/08/2014 10:56 test: test	View

Search (start typing)

Filter data in this page or find pages/reports.

**Favourite Actions**

Edit Favourites

**Recent Checks**

Green Red

## YOUR HOMEPAGE

You can set your own preference for the first screen you view after you log in via **My Account** options. It is also possible to set your **Favourite Pages** from this screen.

quality control greenlight

Muddy Boots | My Account | Log Out

QC Checks | Corrective Actions | Lookups | Assessments | QAS | **Users** | Reports

Search for... Home

### User Profile

Full Name: Muddy Boots

Position: System User

Mobile: [redacted]

Home Page: Home > Reports > Dashboards > Intake Dashboard

Favourite Pages: Home > QC Checks > View QC Checks

Home > Users > User Administration

Home > Assessments > Assessment Question Administration

Home > Reports > Dashboards > Recent Activity

Select a favourite page

**Restricted Details**  
For security reasons, you must enter your current password to make any changes to your email address or your password.

Current Password: [redacted]

Email: support@muddyboots.com

New Password: [redacted]

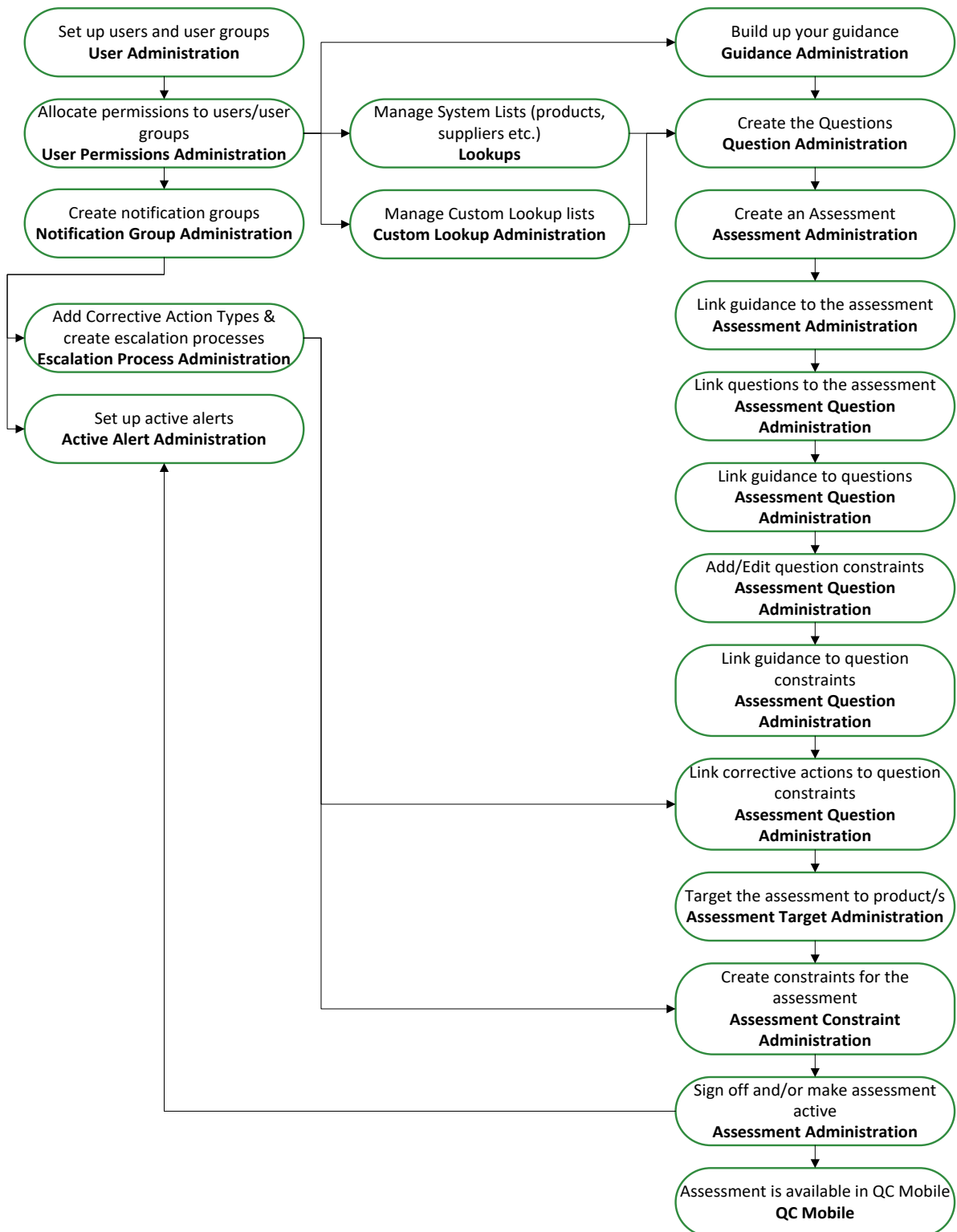
Confirm Password: [redacted]

Update Cancel

## MAIN USER FUNCTIONS

The flowchart describes the main flow of functions a user will perform in QC Office prior to a check being completed in QC Mobile. The function/activity is displayed in normal type and the corresponding submenu is shown in bold type.

**Please note:** Not all steps are mandatory.

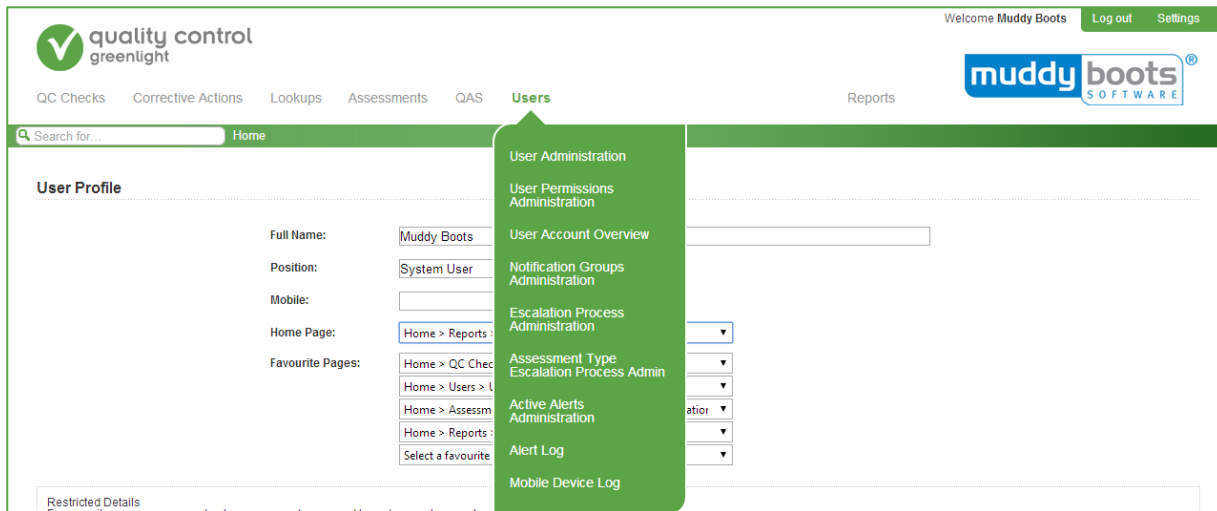


## USERS

### USER ADMINISTRATION

You can create individual users and user groups that will have access to the system.

- 1) Hover over **Users** in the menu and select **User Administration** from the submenu.



### CREATE USER GROUPS

**User Groups** allow users to be grouped together to allow permissions to be applied to a group rather than individuals.

- 1) From the **User Administration** screen, select **User Groups**, which changes the action available to **Add New User Group** on the right of the screen.
- 2) Enter the **Full Name** of the group, select the **User Level** and **Company**.
- 3) Make sure the **User Group** option is ticked.
- 4) Click **Save**.

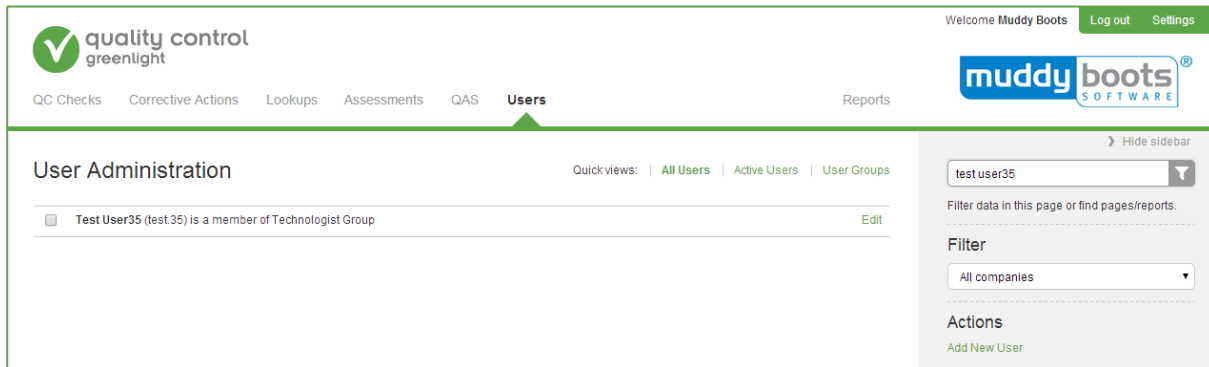
The screenshot shows the 'Add User Group' form. It has a search bar at the top right. Below it, there are fields for 'Full Name', 'User Level' (Standard), and 'Company' (Select Company). There is a checkbox labeled 'User Group' which is checked. At the bottom left, there are 'Save', 'Clear', and 'Back' buttons. On the right side, there are 'Actions' (Save, Clear, Back) and footer information: 'Greenlight Quality Control 2.2.46.22 NODE 8' and '© 2014 Muddy Boots Software Limited'.

**Please note:** When selecting the user level you can choose from the following:

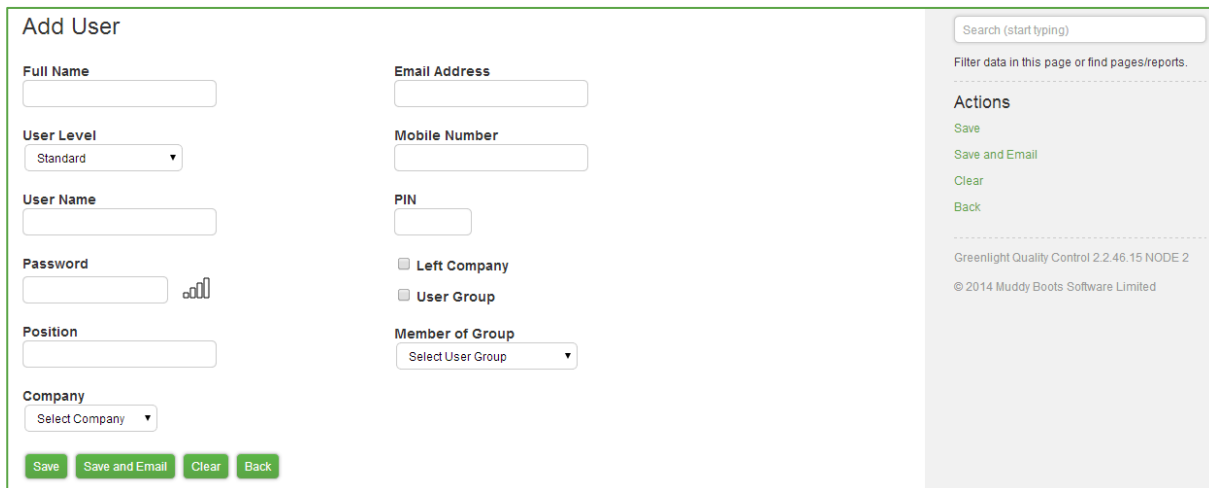
- a) Administrator - Always has full access to all screens and data and can create any level of user.
- b) Super User - Can view and create assessment administrators, standard and supplier users.
- c) Assessment Administrator - Can view and create standard and supplier users.
- d) Standard - Can view and create supplier users.
- e) Supplier - Will not be able to access the user administration or user permission administration screens nor view or create other users.

## CREATE NEW USER

- 1) In the **User Administration** screen, select **All Users** or **Active Users** from the option at the top.
- 2) Click **Add New User** on the right of the **User Administration** screen.



You will be taken to the entry screen.



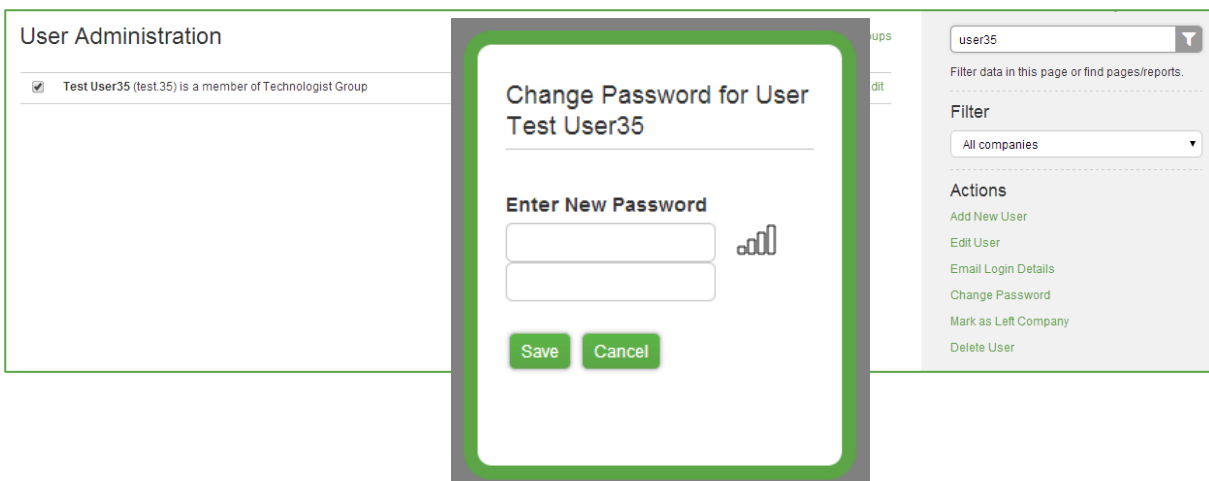
- 3) Enter user information:
  - **Full Name** - Free text.
  - Choose **User Level**.
  - **Username** - This could be in the format 'firstname.username'.
  - **Password** - Free text, which has to meet complexity requirements (at least 7 characters of which, 1 must be upper case, 1 lower case and 1 number or non-alphanumeric character (e.g. a ?). *It will expire after 180 days and therefore, require updating.*
  - **Position** - Free text.
  - **Company**.
  - **Email Address** - Required for alerts and notifications to be sent to user.
  - **Mobile Number** - Required for SMS alerts and notifications to be sent to user.
  - **Member of Group** - This can only be added when you have set up user groups.
- 4) Click **Save**.

**Please note:** You do not need to enter data into the following field:

- **Left Company** - This tick box is used to signify an employee has left the company. If this is ticked, a user will no longer be able to log into the system but the history of any system activity performed by them is retained (e.g. checks they have completed or assessments they have created will still show their name).
  - For all user levels (except Administrators), the screens which they can see are typically defined by their membership of a specific User Group. The User Groups will be assigned screen permissions using the User Permissions Administration screen. Until these screens are selected, the user will not be able to access anything within Greenlight QC, apart from their own account settings.
- 5) Click **Save** or **Save and Email** (to send login details to the user).

### CHANGE OR REISSUE PASSWORD

- 1) In **User Administration**, tick the user to select them.
- 2) To change the password select **Change Password** from the actions menu.
- 3) In the pop-up that opens, enter the new password twice and click **Save**.



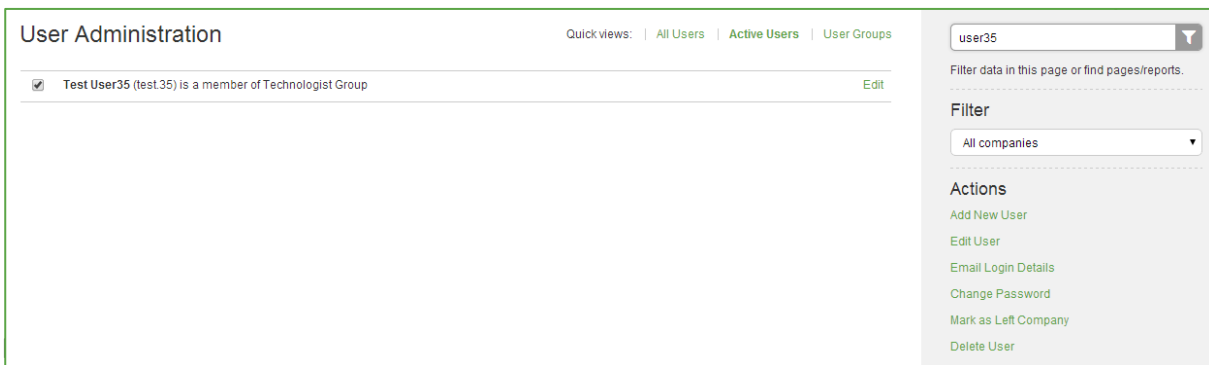
**\* Please Note:** The password must be at least seven characters and consist of one upper case letter, one lower case letter and one number or non-alphanumeric character (e.g. a ?). It will expire after 180 days and therefore, require updating.

- 4) To reissue a password, select **Email Login Details** from the actions menu. The user will be sent an email containing their username and a link to reset their password.

## USERS DEPARTING COMPANY & DELETING USERS

If a user leaves the company, the following steps must be followed. This will deactivate the user's account so they cannot log into Greenlight QC.

- 1) In **User Administration**, tick the user to select them.
- 2) If a user leaves the company, select **Mark as Left Company** from the actions menu.
- 3) To delete a user, select **Delete User** from the actions menu.



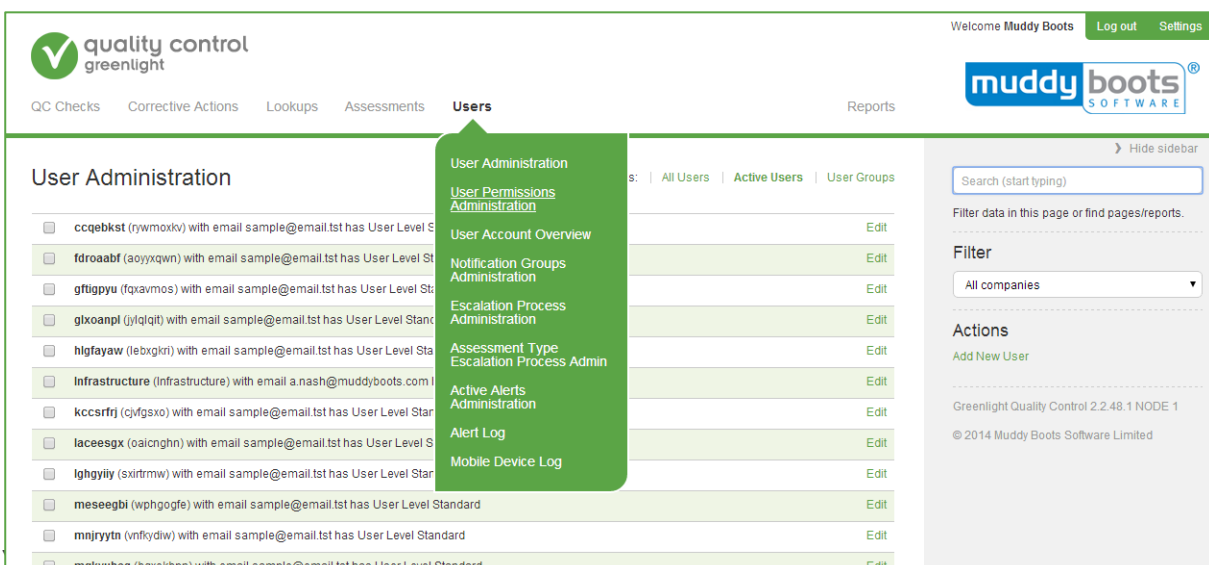
logging in. If they have completed any QC checks, their name will disappear from those checks. To prevent their name being removed from actions such as this, instead please 'Mark as Left Company'.

## USER PERMISSIONS ADMINISTRATION

You can apply permissions to individual users or user groups. Permissions include **Application Permissions** (i.e. choosing which screens in QC Office and QC Mobile a user can access when they log in) and **Data Permissions** (i.e. choosing what information a user can see when they log in, such as stock codes).

## ASSIGN USER PERMISSIONS

- 1) Hover over **Users** in the menu, and select **User Permissions Administration** from the submenu.



SCREEN	ALLOWED
All Screens (0 of 57 screens)	<input type="checkbox"/>
▶ QC Checks (0 of 4 screens)	<input type="checkbox"/>
▶ Corrective Actions (0 of 4 screens)	<input type="checkbox"/>
▶ Lookups (0 of 9 screens)	<input type="checkbox"/>
▶ Assessments (0 of 9 screens)	<input type="checkbox"/>
▶ Reports (0 of 22 screens)	<input type="checkbox"/>
▶ Users (0 of 9 screens)	<input type="checkbox"/>

## Application Permissions

- 1) Make sure **Application Permissions** are selected using the button on the right to begin applying screen permissions to users.

SCREEN	ALLOWED
All Screens (0 of 58 screens)	<input type="checkbox"/>
▶ QC Checks (0 of 4 screens)	<input type="checkbox"/>
PQI Facility check	<input type="checkbox"/>
▶ Corrective Actions (0 of 4 screens)	<input type="checkbox"/>
▶ Lookups (0 of 9 screens)	<input type="checkbox"/>
▶ Assessments (0 of 9 screens)	<input type="checkbox"/>
▶ Reports (0 of 22 screens)	<input type="checkbox"/>
▶ Users (0 of 9 screens)	<input type="checkbox"/>

- 2) From the **Permission Type** drop down, select QC Office Web or QC Mobile.
  - QC Mobile Permissions – To select which QC Mobile options a user can access.
  - QC Office Web Permissions – To select which QC Office screens a user can access.
- 3) Select a **Group** or **Individual User** to apply the permissions to. You can also select a **Company** to filter the available users further.

**Please note:** Group application permissions will override individual application permissions for any user that is a member of the relevant User Group. Muddy Boots recommends all non-Administrators are a member of an appropriate User Group.

- 4) The table of contents on the left will display all areas where it is possible to apply permissions to. Anything ticked indicates the permission is allowed.
- 5) Click on the green arrow to the left of the permission section to expand the view and check the appropriate boxes to select the permissions you wish to apply.

6) When you have selected the appropriate permissions, select **Save Changes** (on the right).

## Data Permissions

1) Click on **Data Permission** to begin applying supplier, location and stock code permissions to users.

- 2) Choose a **Permission Type** from the drop down. This is a list of all areas to apply permissions to:
  - a) **Location Permissions** – Link a user to locations relevant to them so they only see data associated with checks completed at those locations.
  - b) **Supplier Permissions** – Link a user to the relevant supplier company or companies so they only see data associated with those suppliers.
  - c) **Business Group Permissions** - Link a user to the relevant **Business Group** (if applicable)
  - d) **Stock Code Sub-Group Permissions** - Link a user to the stock code sub-groups relevant to them so they only see data associated with checks completed for those stock code sub-groups.
  - e) **Stock Code Permissions** - Link a user to the relevant stock codes so they only see data associated with checks completed for those stock codes.



- 3) Select a user to apply the permissions to. You can also select a company to narrow down the available users further.



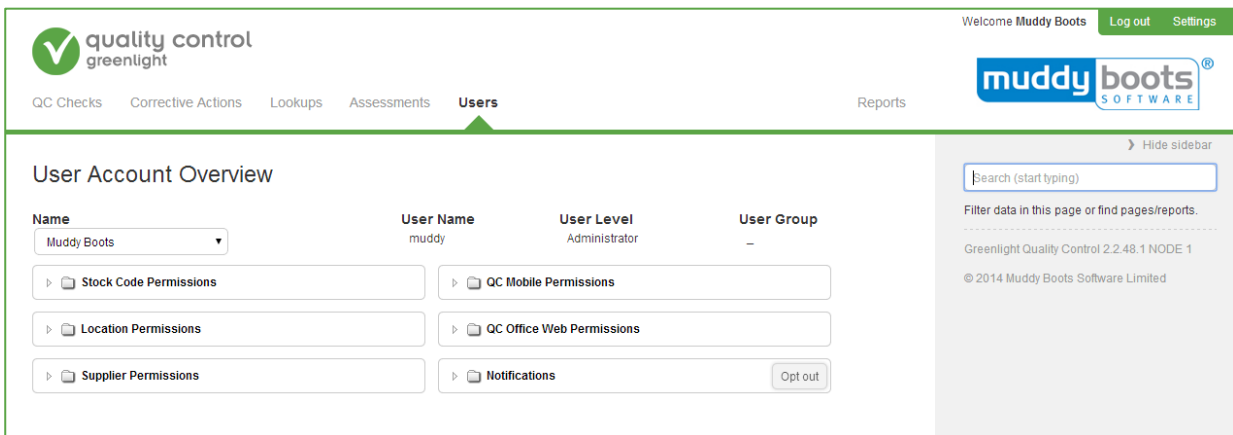
**Please note:** The screen will only display assigned permissions by default; you will need to select **All Items** (top right above grid view) to display the full list of permissions.

- 4) Depending on the **Permission Type** you have chosen, different areas will display in a grid; it is possible to click on these cells to select an area to apply permissions to. Any green cells indicate permissions are allowed.
- 5) When you have selected the appropriate permissions, select **Save Changes**.



### USER ACCOUNT OVERVIEW

The **User Account Overview** screen allows you to see the permissions your user account has and what notification groups you are in. You can opt out of a notification group if required. Administrators can use this screen to view details of any user.



**Please note:** A user needs to be given the permission to see this screen in the **User Permission Administration** screen.

## NOTIFICATION GROUPS ADMINISTRATION

Notification groups are used in multiple ways in Greenlight QC (e.g. to assign corrective actions to or to send active alerts to). Users can be in multiple groups if necessary.

### CREATING A NOTIFICATION GROUP

- Hover over **Users** in the menu, and select **Notification Groups Administration** from the submenu.

The screenshot shows the 'Users' menu in the Muddy Boots software. The 'Users' menu is open, and the 'Notification Groups Administration' option is highlighted in green. The main content area shows a list of users with their names, email addresses, and user levels. The right sidebar contains a search bar, a filter dropdown set to 'All companies', and an 'Add New User' button.

- Enter the name of the **Notification Group** and click **Save**. The group you created will appear in the grid at the top of the screen.

The screenshot shows the 'Notification Groups Administration' screen. It features a table with three columns: 'Notification group name', 'Enabled', and 'Delete'. The table contains three rows: 'QC Check Alerts', 'Quality Manager', and 'test'. Below the table is an 'Add A Group' form with a 'Group Name' input field, an 'Enabled' checkbox, and 'Save' and 'Cancel' buttons.

Edit	Notification group name	Enabled	Delete
	QC Check Alerts	<input checked="" type="checkbox"/>	
	Quality Manager	<input checked="" type="checkbox"/>	
	test	<input checked="" type="checkbox"/>	

- Add **Users** to this group by clicking on the edit button next to the group name.
- Scroll to the bottom of the screen and either:
  - a) Under the heading **Add A User** select individual users from the drop down list.
  - b) Click **Add Multiple Users** button to select multiple Users.

- Click **Save**.

**Notification Groups Administration**

Edit	Notification group name	Enabled	Delete
	QC Check Alerts	<input checked="" type="checkbox"/>	
	Quality Manager	<input checked="" type="checkbox"/>	
	test	<input checked="" type="checkbox"/>	

**Edit Group**

Group Name:  Enabled:

User	E-mail address	Company	Supplier	Delete
No records to display.				

**Add A User**

User:

**Please note:** If you click **Add Multiple Users**, you have the option of copying users from another notification group by choosing the group, selecting the users and then clicking **Save**.

**Copy From:**

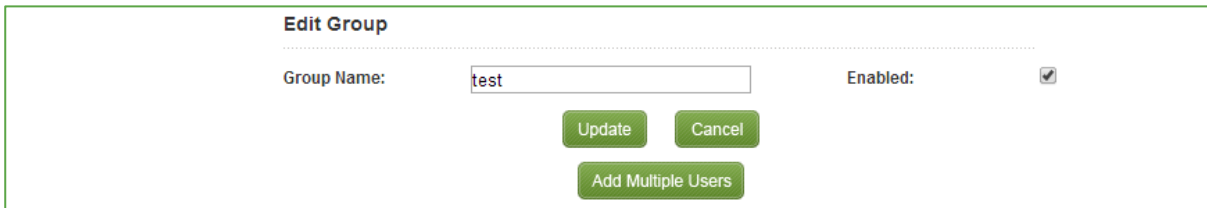
<input checked="" type="checkbox"/>	Full name	E-mail address	Company
<input checked="" type="checkbox"/>	Muddy Boots	support@muddyboots.com	

## DISABLING A NOTIFICATION GROUP

**Please note:** It is not advisable to delete an existing **Notification Group** as there may be data associated with it; disable it instead.

To disable a **Notification Group**:

- 1) Complete steps 1 and 2 of **Edit a Notification Group**.
- 2) Click on the **Enabled** check box to remove the tick.
- 3) Click **Update**.



The screenshot shows a form titled "Edit Group". It has a "Group Name" field with the text "test" and an "Enabled" checkbox which is checked. Below the form are three buttons: "Update", "Cancel", and "Add Multiple Users".

To enable a **Notification Group**, repeat this process and tick the **Enabled** check box.

## ESCALATION PROCESS ADMINISTRATION

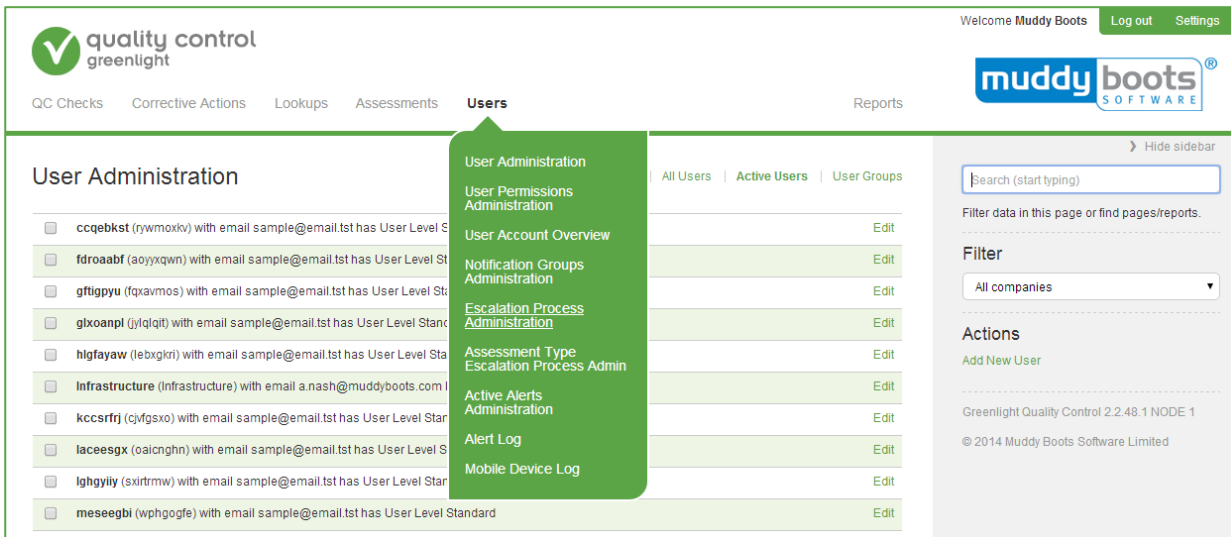
This area is used to define a corrective action and create the escalation processes that will be followed when a corrective action or failure is raised from the system. The escalation process means email alerts can be sent to a user or user group if the corrective action is not complete after a certain period. If the corrective action remains incomplete, another email alert can be sent to the same or a different user or user group. You can add as many levels as you need into the escalation process.

After creating a corrective action and escalation process, you can link it to your assessments:

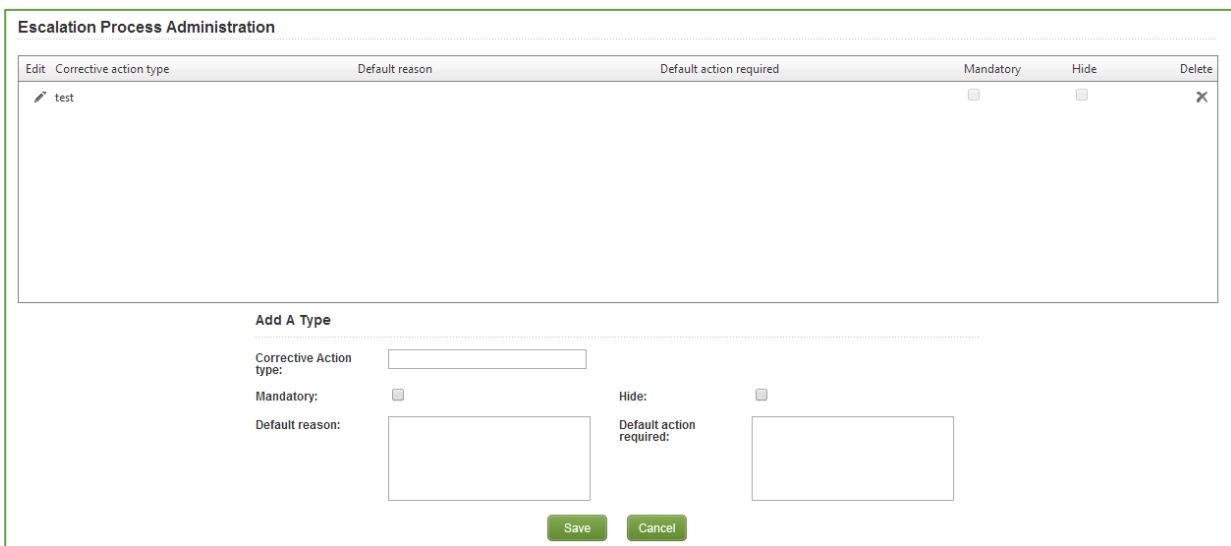
- **Assessment Question Administration** – To link your corrective action to a question constraint.
- **Assessment Constraint Administration** – To link your corrective action to the overall QA flag for an assessment.
- **Assessment Type Escalation Process Admin** – To link your corrective action to all assessments of an assessment type.

## CREATING AN ESCALATION PROCESS

- 1) Hover over **Users** in the menu and select **Escalation Process Administration** from the submenu.



- 2) Enter the **Corrective Action type**, **Default Reason**, **Default Action Required** and select whether the corrective action is mandatory (i.e. must be saved by the user when raised). Do not tick **Hide**.
- 3) Click **Save**. Your corrective action will appear in the grid at the top of the page.
- 4) Click the edit button next to the corrective action.



- 5) Scroll to the bottom.
- 6) Under the heading **Add A Level** enter the following data:
  - a) **Sort Order** – Defines the order the process will go through. The lowest number will be the first level called in that failure.
  - b) **Notification Group or Assign User or Assign supplier** – Select one of these options to choose who to send the corrective action to.
  - c) **Reminder Alert** – Tick this box if you want an email reminder to be sent to the user(s) when the corrective action is due to expire.

- d) **Failure Notification Group** – Select a notification group to be informed if the corrective action deadline passes and it has not been closed.
  - e) **Deadline Interval and Interval Unit** – Enter a number in the **Deadline Interval** field and enter the unit in the **Interval Unit** field to specify the period which an email notification will be sent if the corrective action has not been completed.
  - f) **Allow Deadline Override** - Tick this if you want users to be able to edit the deadline when the corrective action is triggered in QC Mobile.
  - g) **Priority Level** – Select from Low / Medium / High.
- 7) Click **Save**.

**Add A Level**

Sort order:  Deadline interval:

Notification group:  Interval unit:

Assign user:  Allow deadline override:

Assign supplier:  Priority level:

Reminder Alert:

Owner Notification Group:

- 8) Repeat steps 6 and 7 to create more than one level in the escalation process.

### DEACTIVATE AN ESCALATION PROCESS

- 1) Hover over **Users** in the menu, and select **Escalation Process Administration** from the submenu.
- 2) The screen will show all escalation processes that exist. Click the edit button on the one you want to deactivate.
- 3) Fields under the grid will be populated with data regarding that escalation process. Select the **Hide** check box to remove this escalation process from use.
- 4) Click **Update**.

**Escalation Process Administration**

Edit	Corrective action type	Default reason	Default action required	Mandatory	Hide	Delete
	Line Check Failure	Line Check Failure	Stop Production. Inform your supervisor.			
	Metal Detector Failsafe failure	question failure	action required	<input type="checkbox"/>	<input type="checkbox"/>	✕
	MN CA	Test Reason	Test Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✕
	Quality Failure	Out of Specification	Stop Production. Inform QA Manager of the situation.	<input type="checkbox"/>	<input type="checkbox"/>	✕
	Scale Calibration Fail	The testing measurements entered are outside of the testing tolerances	Ensure QC Manager is contacted.	<input type="checkbox"/>	<input type="checkbox"/>	✕
	Steve Test	test	test	<input type="checkbox"/>	<input type="checkbox"/>	✕

**Edit Type**

Corrective Action type:

Mandatory:  Hide:

Default reason:

Default action required:

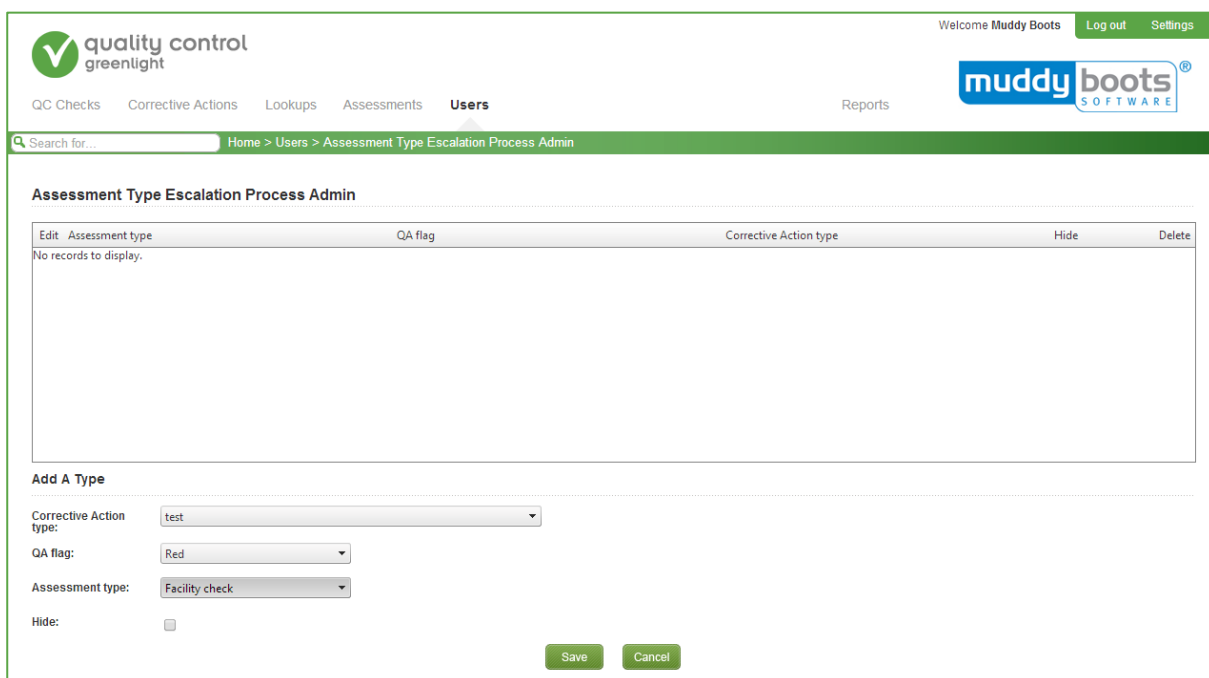
**Please note:** You can reactivate an escalation process in the future by removing this tick in the **Hide** check box.

## ASSESSMENT TYPE ESCALATION PROCESS ADMINISTRATION

This screen is used to link a corrective action to all checks of an assessment type in one go (e.g. the same corrective action can be triggered for all arrival checks with a QA flag of red). Create the corrective action and escalation process in the **Escalation Process Administration** screen before following the process to link it to the assessment type.

### LINK ESCALATION PROCESS TO ASSESSMENT TYPE

- 1) Hover over Users and select Assessment Type Escalation Process Admin from the submenu.
- 2) Choose the Corrective Action Type, QA Flag and Assessment Type.
- 3) Click **Save**.



The screenshot displays the 'Assessment Type Escalation Process Admin' interface. At the top, there's a navigation bar with 'quality control greenlight' and 'muddy boots SOFTWARE' logos. The main content area features a table with the following structure:

Edit	Assessment type	QA flag	Corrective Action type	Hide	Delete
No records to display.					

Below the table is the 'Add A Type' form:

- Corrective Action type:
- QA flag:
- Assessment type:
- Hide:

Buttons for 'Save' and 'Cancel' are located at the bottom right of the form.

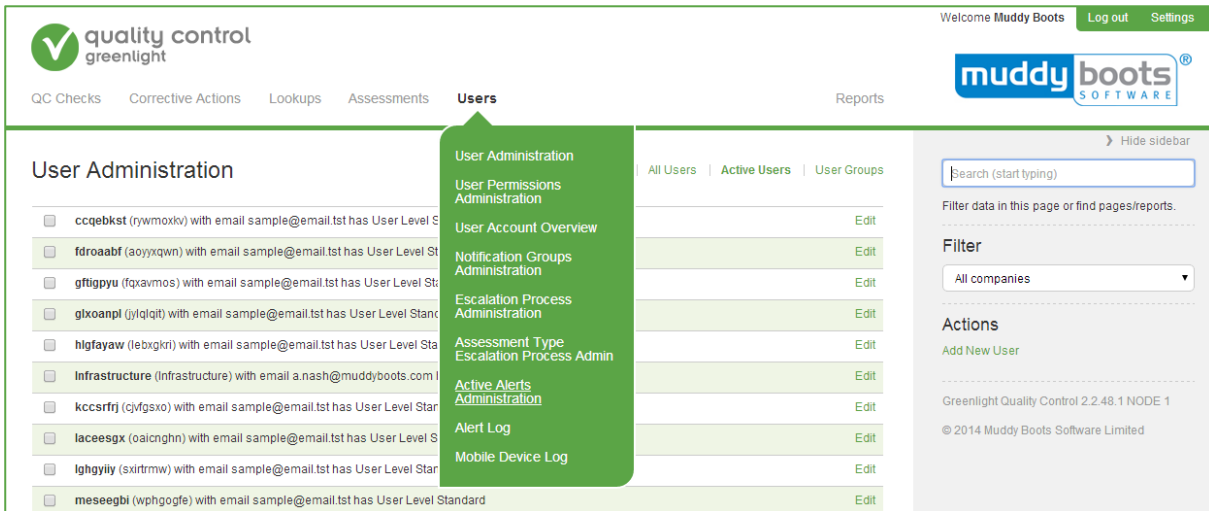
## ACTIVE ALERTS ADMINISTRATION

### SET UP AN ACTIVE ALERT

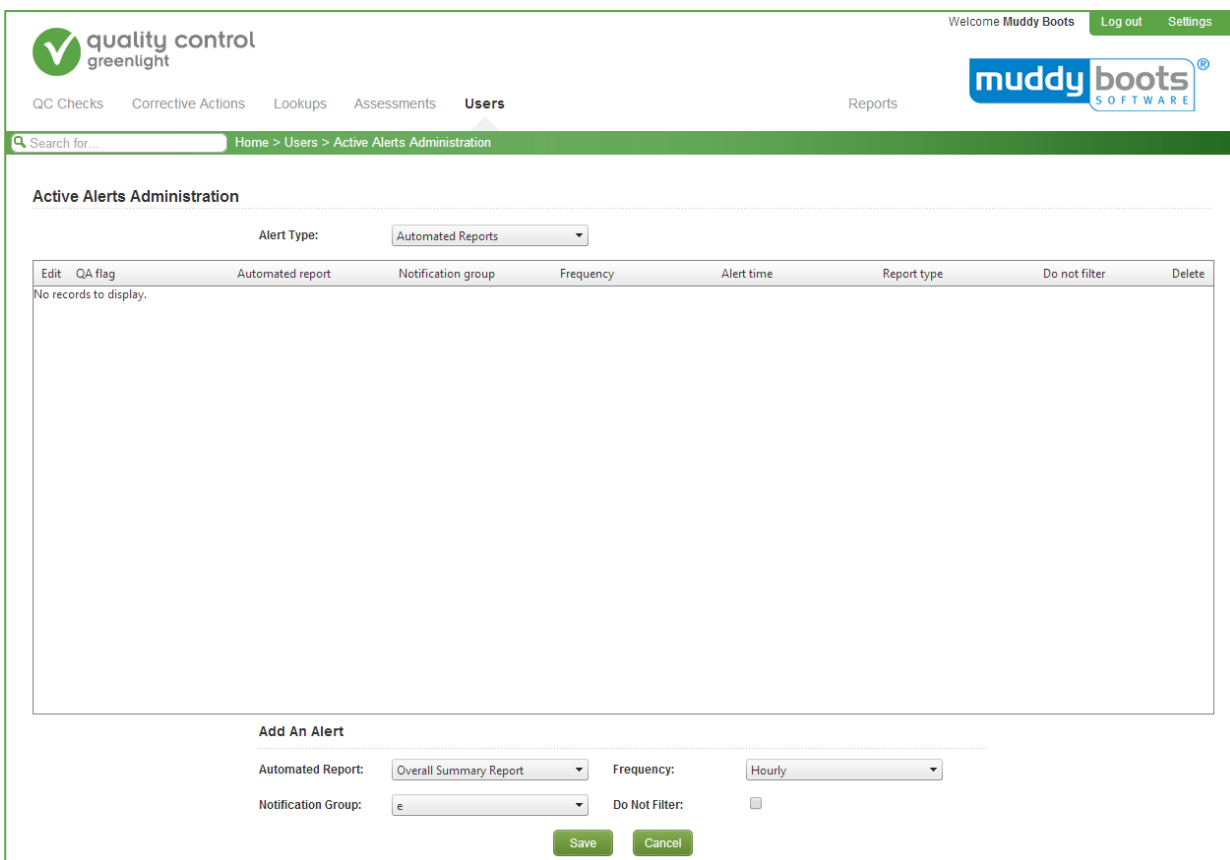
Active alerts are emails with reports attached that are sent automatically to notification groups.

Choose from **QC Check Reports** that are sent when a check is completed in QC Mobile (see '**by Assessment**' or '**by Assessment Type**' alerts) or standard reports that can be sent at a set frequency chosen by you (see '**Automated Report**' alerts). To create an active alert:

1) Hover over **Users** in the menu and select **Active Alerts Administration** from the submenu.



- 2) Select the alert type you want to create from the drop down list at the top of the screen:
  - a) **By Assessment type** - Notification is sent when any assessments of a certain type (e.g. Arrival, Facility, Shelf Life) are completed with a certain QA Flag (all / red / amber / green).
  - b) **By Assessment** - Notification is sent when a particular assessment is completed.
  - c) **Automated Reports** - Select a report to be sent at defined intervals.
- 3) Complete in fields below the grid to customise the alert.





For **Assessment Type** active alerts:

- 1) Choose **Assessment Type** from the drop down field.
- 2) Pick the **QA Flag** you want to trigger the active alert from.
- 3) Choose the **Notification Group** you want the active alert to be sent to.
- 4) Choose the **Frequency** to set when you want the active alert sent.
- 5) Click **Save**.

For **Assessment** active alerts:

- 1) Select the **Assessment** for which you want to trigger an active alert. The alert will be sent every time this assessment is completed.
- 2) Choose the **Notification Group** you want the active alert to be sent to.
- 3) Choose the **Frequency** to set when you want the active alert sent.
- 4) Click **Save**.


For **Automated Reports**:

- 1) Choose the **Automated Report** that you would like to be sent:
- 2) Choose the **Notification Group** you want the report sent to.
- 3) Choose the **Frequency** to set when you want the report sent.
- 4) Click **Save**.

**Add An Alert**

---

Automated Report:  Frequency:

Notification Group:  Alert Time:  

Do Not Filter:

If you select a frequency of **Daily** for **By Assessment Type** or **By Assessment** you will be able to choose the report type. Choose between:

- ★ **Summary** – One email containing the QC Summary Report.
- ★ **Detail** – One email with one report containing the detail from all QC checks completed that day.

You can set up multiple alerts on each report if required.

Where the QC Check Report is sent as part of the active alert (i.e. by assessment and by assessment type alert types), any additional attachments (such as .ttx, .das and .ltd file types) will be attached to the email rather than embedded in the QC Check Report.

**Please Note:** If you select a frequency of daily, you will be able to specify the time of day the alert is sent in the **Alert Time** box that appears.

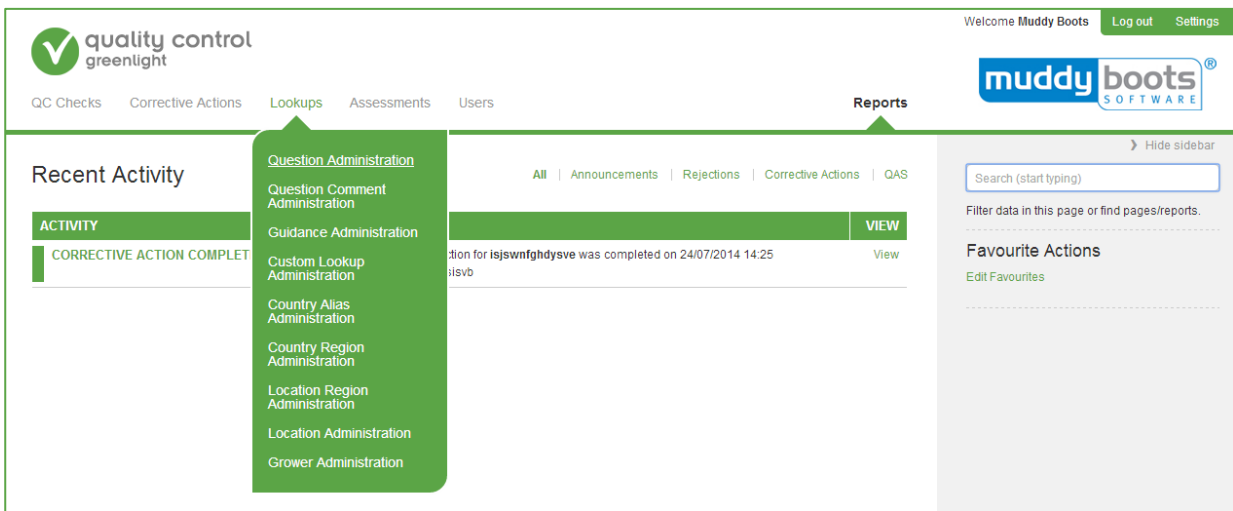
## LOOKUPS

The **Lookups** area of the menu lists information used when creating assessments. Generally, it is best to create these lists and then link them into assessments.

### QUESTION ADMINISTRATION

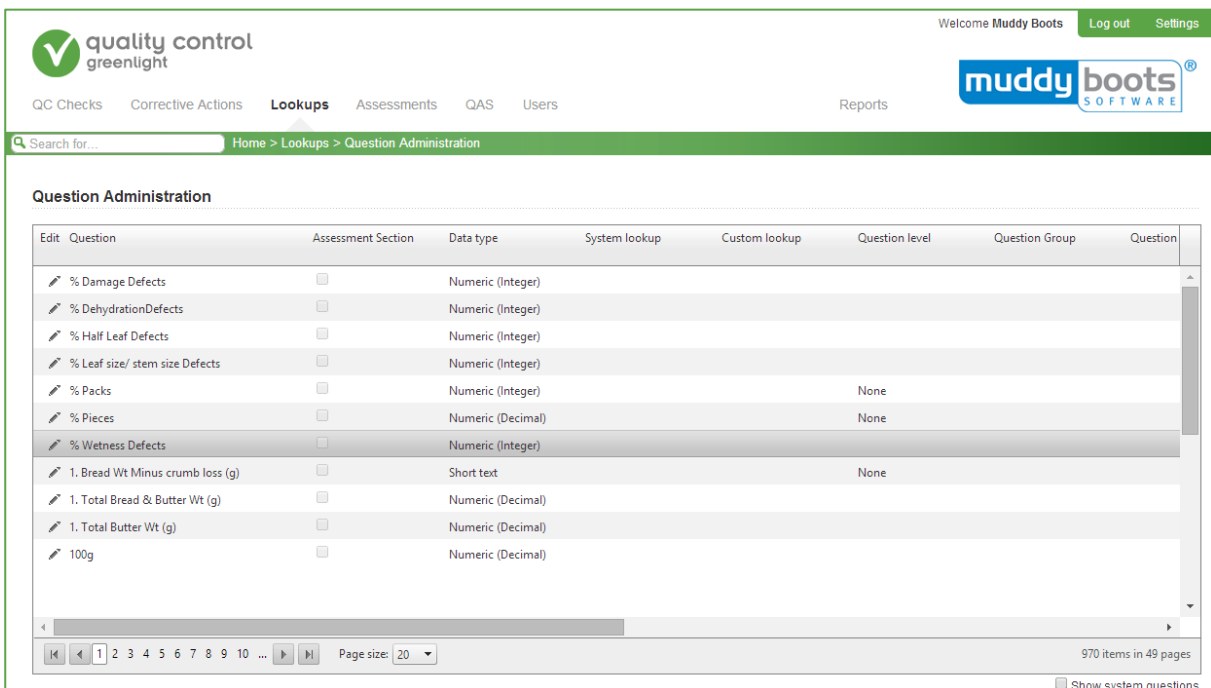
The **Question Administration** page holds a list of all questions available to be added to assessments. Questions need to be entered here before they can be added to an assessment.

Hover over **Lookups** in the menu, and select **Question Administration** from the submenu.



### ADD A QUESTION

- 1) To add a question, first check the question is not already within the system by opening the **Question Administration** page and searching the questions shown in the grid.



- 2) Under the heading **Add A Question** enter the following data:
- a) **Question** - Enter the title of the question you want to add.
  - b) **Assessment Section** - Leave blank.
  - c) **Data type** - This is the type of response to be entered for this question. Select one of the following:
    - **Short text** - A text entry up to 50 characters.
    - **Long text** - A text entry up to 255 characters.
    - Date.
    - Time.
    - Date/Time.
    - **Numeric (integer)** - Allows only whole numbers.
    - **Numeric (decimal)** - Allows numbers up to two decimal places.
    - Yes/No.
    - **System Lookup** - Allows data to be selected from a lookup of other data in the system (e.g. stock codes, suppliers).
    - **Custom Lookup** - Data can be selected from a user-defined lookup created in the **Custom Lookup Administration** page.
  - d) **System Lookup** - If you have specified system lookup as the data type, select which system list to use in this field.
  - e) **Custom Lookup** - If you have specified custom lookup as the data type, select which custom list to use in this field. If you need to set up a new **Custom Lookup** list, refer to **Custom Lookup Administration**.
  - f) **Question Level** - Defines the severity level of the attribute / defect, if applicable. Within an assessment, questions of the same level can later be grouped and the overall result of the assessment determined by the results of each level.
  - g) **Question Group** - Select the group the question belongs to for reporting purposes. To add a new question group, type the name into the box.
  - h) **Question Sub Group** - Select the sub-group the question belongs to for reporting purposes. To add a new question sub-group, type the name into the box.
  - i) **Quick Guidance** - Add up to 255 characters of text here to assist users with answering this question.
  - j) **Question Tags** - Define any tags you want to apply to the question. Separate multiple tags with a semi-colon. These tags can then be used to filter questions according to their tags.
  - k) **Assessment Type** - Choose the assessment type which this question will be used in if it is to be used in one type only. If the question is to be used in more than one assessment type, leave this blank.
  - l) **Default Question** - When creating your assessments you can '**Fill with Default Questions**'. If you want your question to appear in that list, tick this box.
  - m) **Hide** - Ticking this box prevents the question from being available for selection when creating assessments, but does not remove it from the system.

**Add A Question**

---

Question: <input type="text"/>	Quick guidance: <input type="text"/>
Assessment Section: <input type="checkbox"/>	Question tags: <input type="text"/>
Data type: <input type="text"/>	Assessment type: <input type="text"/>
System lookup: <input type="text"/>	Default question: <input type="checkbox"/>
Custom lookup: <input type="text"/>	Hide: <input type="checkbox"/>
Question level: <input type="text" value="None"/>	
Question Group: <input type="text"/>	
Question Sub Group: <input type="text"/>	

3) Click **Save**. Your question will appear in the grid at the top of the page.

### ADD AN ASSESSMENT SECTION

---

Assessment questions can be grouped under **Assessment Sections**. To create one:

- 1) Under the **Add A Question** page, enter the following:
  - a) **Question** - Title of the question group.
  - b) **Assessment Section** - Tick this box.
- 2) Click **Save**.

**Add A Question**

---

Question: <input type="text"/>	Quick guidance: <input type="text"/>
Assessment Section: <input checked="" type="checkbox"/>	Question tags: <input type="text"/>
Data type: <input type="text"/>	Assessment type: <input type="text"/>
System lookup: <input type="text"/>	Default question: <input type="checkbox"/>

### QUESTION COMMENT ADMINISTRATION

In Greenlight QC Mobile, users can add free text comments against questions whilst completing a QC Check. As an alternative, you can create a drop down list of comments they can choose from. To add a comment option to a question:

- 1) Hover over **Lookups** in the menu and select **Question Comment Administration** from the submenu.
- 2) Select the question you want to add the comment to.
- 3) Type the comment text in the **Comment** box.
- 4) Click **Save**.

**Please note:** You can add more than one comment option to each question if required.

## GUIDANCE ADMINISTRATION

Guidance administration allows you to link large amounts of guidance text, external documents, web links or images to questions so this information can be viewed by the QC Mobile users when they are completing QC Checks. This can be linked to an assessment (in the **Assessment Administration** screen), a question (in the **Assessment Question Administration** screen) or a constraint (in the **Assessment Question Administration** screen). To create a guidance record:

- 1) Hover over **Lookups** in the menu, and select **Guidance Administration** from the submenu.
- 2) The grid at the top of the screen gives details of all existing guidance records. The grid also shows how many active assessments each guidance record is being used in (see **In Active Assessments** column), as well as **Edit** and **Delete** buttons for each record.
- 3) Under the heading **Add Question Guidance**, enter data in the following fields where required:
  - a) **Guidance Description** - This is the title or a short description of the guidance.
  - b) **Guidance Text** - Enter full guidance text you want to appear when the guidance is shown. This could be to supplement a picture or document that the guidance links to, or may be the full guidance description without any linked document.
  - c) **Guidance URL** - A web link or a link to an external document to reference the guidance. Click the **Test** button to test the link.
  - d) **Procedure URL** - A web link or a link to an external document to display a procedure that should be followed. Click the **Test** button to test the link.
  - e) **Specification URL** - A web link or a link to an external document to display the product specification. Click the **Test** button to test the link.
  - f) **Add Attachment** - Click **Browse** and select a file to be linked to this guidance.
  - g) **Hide** - Leave blank, unless you want to hide this record from being included in assessments.
- 4) Click **Save**.

**Add Question Guidance**

---

Guidance Description:

Guidance Text:

Guidance URL:

Procedure URL:

Specification URL:

Hide:

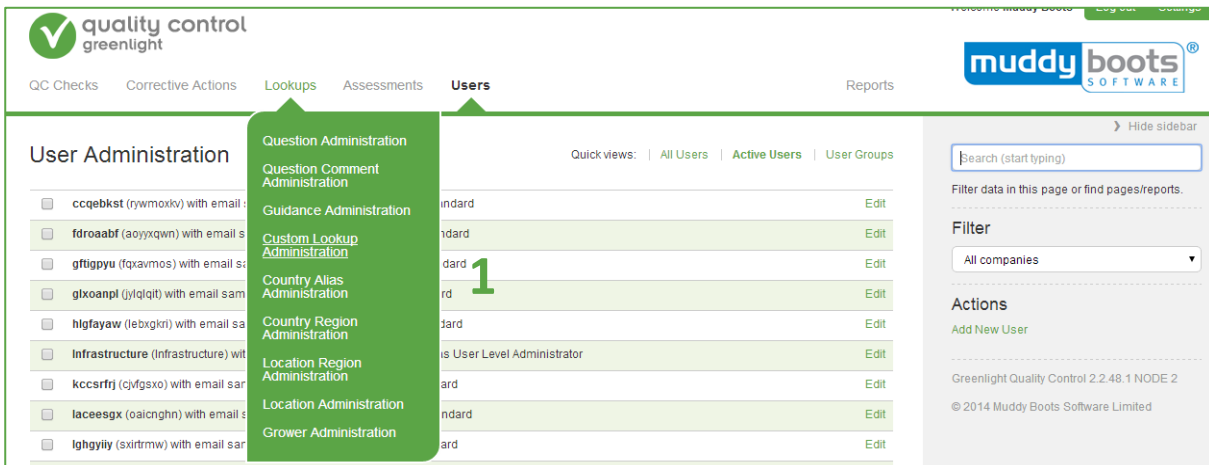
No file chosen

Your guidance will now appear in the grid at the top of the screen and will be available for selection in the **Assessment Administration** and **Assessment Question Administration** screens.

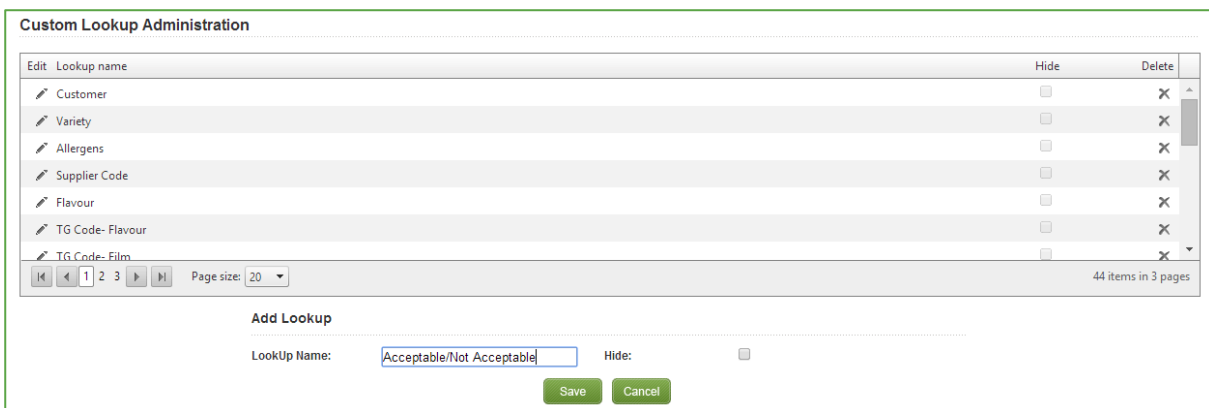
## CUSTOM LOOKUP ADMINISTRATION

Custom lookups are user-defined lists, which can be linked to a question to give the user a choice of responses. They are created in the **Custom Lookup Administration** and linked to a question in the **Question Administration** or **Assessment Question Administration** screens. To add a new custom lookup:

- 1) Hover over **Lookups** in the menu, and select **Custom Lookup Administration** from the submenu.



- 2) Under the heading **Add Lookup**, enter the name of the **Lookup**.
- 3) Click **Save**.



- 4) Your lookup will now appear in the grid at the top of the page. From the grid, click on the edit button next to your lookup.
- 5) Under **Add Item**, fill in the details next to Display Text, Sort Order, QA Flag and Score.
- 6) Click **Save**.

**Custom Lookup Administration**

Edit	Lookup name	Hide	Delete
	Customer	<input type="checkbox"/>	
	Variety	<input type="checkbox"/>	
	Allergens	<input type="checkbox"/>	
	Supplier Code	<input type="checkbox"/>	
	Flavour	<input type="checkbox"/>	
	TG Code- Flavour	<input type="checkbox"/>	
	TG Code- Film	<input type="checkbox"/>	

Page size: 20      45 items in 3 pages

**Update lookup**

LookUp Name:       Hide:

Edit	Display text	Sort order	QA flag	Score	Hide	Delete
	Var 1	1			<input type="checkbox"/>	
	Var 2	2			<input type="checkbox"/>	
	Var 3	3			<input type="checkbox"/>	

**Add Item**

Display Text:       Score:

Sort Order:       Hide:

QA Flag:

Each item will appear in the grid when you click **Save**. Repeat steps 4 and 5 to add as many items as you need to your custom lookup.

### SUPPLIER ADMINISTRATION

*A list of your supplier companies can be made available in Greenlight QC if it has been integrated with another of your computer systems that holds this data. If your Greenlight QC system has not been integrated, you can manage your own list of supplier companies as follows:*

This list of suppliers will appear on mobile devices for any checks where there is a question that has been created as a system lookup question linked to the supplier list. If creating a new supplier user in the **User Administration** screen, you will be able to link the user to one of the supplier companies added. To add a new supplier company:

- 1) Hover over **Lookups** and select **Supplier Administration** from the submenu.
- 2) To add a supplier to the screen scroll to below the grid and under the heading **Add Supplier**, add **Supplier code**, **Supplier name**, **Email address** and **Country of Origin**.
- 3) Click **Save**.

**Supplier Administration**

Edit	Supplier code	Supplier name	E-mail address	Country	Hide	Delete
	2540	Supplier A			<input type="checkbox"/>	
	1652	Supplier B			<input type="checkbox"/>	
	2911	Supplier C			<input type="checkbox"/>	
	4435	Supplier D			<input type="checkbox"/>	
	5634	Supplier E			<input type="checkbox"/>	
	8978	Supplier F			<input checked="" type="checkbox"/>	
	8545	Supplier G		Brazil	<input type="checkbox"/>	
	1234	Supplier H (1234)			<input type="checkbox"/>	

**Add Supplier**

Supplier code

Supplier name

E-mail address

Country of Origin

Hide

## STOCK CODE ADMINISTRATION

A list of your stock codes can be made available in Greenlight QC if it has been integrated with another of your computer systems that holds this data. If your Greenlight QC system has not been integrated, you can manage your own list of stock codes as follows:

This list will be linked to any question that was created as a system lookup question where the system lookup is 'stock code'. QC Mobile users will be able to select from this list when they are completing checks and therefore, your data can be grouped per stock code in your reports. You will also be able to target assessments to stock codes meaning that when the QC Mobile user enters a particular stock code, the appropriate assessment will be automatically available.

When adding stock codes you can categorise them into a product hierarchy by using the business unit, business group, stock code area, stock code group, stock sub-group and stock code segment boxes. This can be useful when you look at Greenlight Quality Control reports, as you can filter data on any of these levels. To add stock codes:

- 1) Hover over **Lookups** in the menu and choose **Stock Code Administration** from the submenu.
- 2) Below the grid enter the following information:
  - a) **Stock type** - Select the type of product you are adding.
  - b) **Stock code** – The code for the product (e.g. 01234).
  - c) **Description** – The description of the product (e.g. Apples x6).
  - d) **Business Unit** – Type or select the top level of your product hierarchy.
  - e) **Business Group** – Type or select the next level in your product hierarchy.
  - f) **Stock code area** – Type or select the next level in your product hierarchy.
  - g) **Stock code group** – Type or select the next level in your product hierarchy.
  - h) **Stock code sub-group** – Type or select the next level in your product hierarchy.
  - i) **Stock code segment** - Type or select the final level in your product hierarchy.
  - j) **Unit stock code** – Choose the unit of packaging the product would be in.\*



- k) **Parent Stock Code** – This is only applicable to stock codes that are seed/variety stock types.
- l) **SKU** – Enter the SKU for the product if applicable.
- m) **Customer** – Select the customer if applicable.

### Stock Code Administration

Stock sub-group:

Edit	Stock type	Stock code	Description	Business Unit	Business Group	Stock code area
	Raw Material Product	4321	Angelino Plums			
	Raw Material Product	23	Asparagus		Produce	
	Raw Material Product	1234	Asparagus		Produce	
	Raw Material Product	9998	Asparagus			
	Raw Material Product	24	Asparagus Tips		Produce	
	Raw Material Product	25	Aubergine		Produce	
	Raw Material Product	26	Avocado		Produce	
	Raw Material Product	1235	Baby Plum Tomato			

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### Add Stock Code

Stock type:     Stock sub-group:   
 Stock code:     Stock code segment:   
 Description:     Unit Stock Code:   
 Business Unit:     SKU:   
 Business Group:     Customer:   
 Stock code area:      Hide  
 Stock code group:

3) Click **Save** to finish.

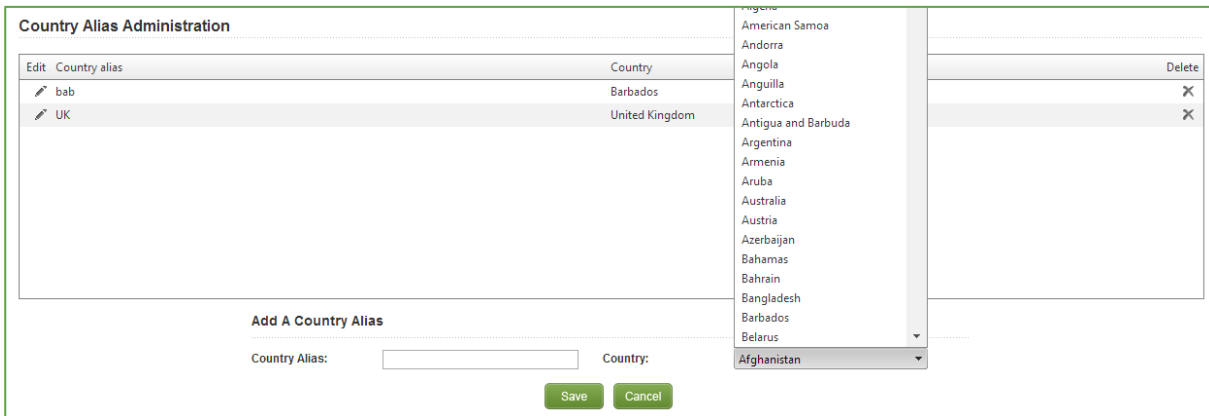
**Please note:**

- \*To create a list of unit stock codes, you will first need to add them on this screen with the relevant stock type.
- To add a list of customers, please contact Muddy Boots who will add this so it is available to select.

## COUNTRY ALIAS ADMINISTRATION

Greenlight QC has a standard list of countries. If users commonly refer to a country by an alternative or alias name (or abbreviation), you can add this on this page and link it to the name in the standard list. When a QC Mobile user enters the alias name, Greenlight QC will recognise it.

- 1) Hover over **Lookups** and select **Country Alias Administration** from the submenu.
- 2) Under the heading **Add A Country Alias**, type in the **Country Alias** and select the **Country** you want to associate it with from the drop down list.
- 3) Click **Save**.



**Country Alias Administration**

Edit	Country alias	Country	Delete
	bab	Barbados	
	UK	United Kingdom	

**Add A Country Alias**

Country Alias:  Country:

Country List (from dropdown):

- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua and Barbuda
- Argentina
- Armenia
- Aruba
- Australia
- Austria
- Azerbaijan
- Bahamas
- Bahrain
- Bangladesh
- Barbados
- Belarus
- Afghanistan

## COUNTRY REGION ADMINISTRATION

Follow steps detailed in 'Country Alias Administration' section.

## LOCATION REGION ADMINISTRATION

Follow steps detailed in 'Country Alias Administration' section.

## LOCATION ADMINISTRATION

Use this section to set up different locations around your business premises or set up multiple sites if applicable.

- 1) Hover over **Lookups** and select **Location Administration** from the submenu.
- 2) Click the edit icon next to an existing location to change details, or use the **Add a Location** form to add a new location to the list.
  - a) Location Name
  - b) Location Code
  - c) Location Type
  - d) Supplier
  - e) Region
- 3) Click **Save**.

Your new location will now appear in the grid view.

### Location Administration

Edit	Location type	Location name	Location code	Region	Supplier	Hide	Main location	Delete
	Store	Berkhamsted	223			<input type="checkbox"/>		
	Store	Biggin Hill	240			<input type="checkbox"/>		
	Store	Billericay	229			<input type="checkbox"/>		
	Store	Bishop's Stortford	101			<input type="checkbox"/>		
	Store	Blaby	141			<input type="checkbox"/>		
	Store	Bloomsbury	207			<input type="checkbox"/>		
	Store	Brackley	797			<input type="checkbox"/>		
	Store	Brackley	797			<input type="checkbox"/>		
	Store	Brackley	797			<input type="checkbox"/>		

322 items in 17 pages

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### Add A Location

Location name:	<input type="text" value="Location 1234"/>	Location type:	<input type="text" value="No type selected"/>
Location code:	<input type="text" value="1234"/>	Supplier:	<input type="text" value="No supplier selected"/>
Hide:	<input type="checkbox"/>	Region:	<input type="text" value="Herefordshire"/>

## GROWER ADMINISTRATION

Use this section to set up different growers connected with your business.

- 1) Hover over **Lookups** and select **Location Administration** from the submenu.
- 2) Click the edit icon next to an existing location to change details, or use the **Add a Location** form to add a new location to the list.
  - a) Grower Code
  - b) Grower Name
  - c) Supplier
- 3) Click **Save**.

Your new growers will now appear in the grid view.

**Grower Administration**

Edit	Grower code	Grower name	Supplier	Hide	Delete
	g1	grow	Supplier C	<input type="checkbox"/>	✕
	003	Grower 3	Supplier B	<input type="checkbox"/>	✕
	004	Grower 4	Supplier B	<input type="checkbox"/>	✕
	002	Grower B	Supplier A	<input type="checkbox"/>	✕
	005	Grower X	Supplier C	<input type="checkbox"/>	✕
	006	Grower Y	Supplier D	<input type="checkbox"/>	✕
	TEst 11	TEsting 001	Supplier A	<input type="checkbox"/>	✕
	999	Zhang	Supplier A	<input type="checkbox"/>	✕

**Add A Grower**

Grower Code:       Supplier:

Grower Name:       Hide:

## ASSESSMENTS

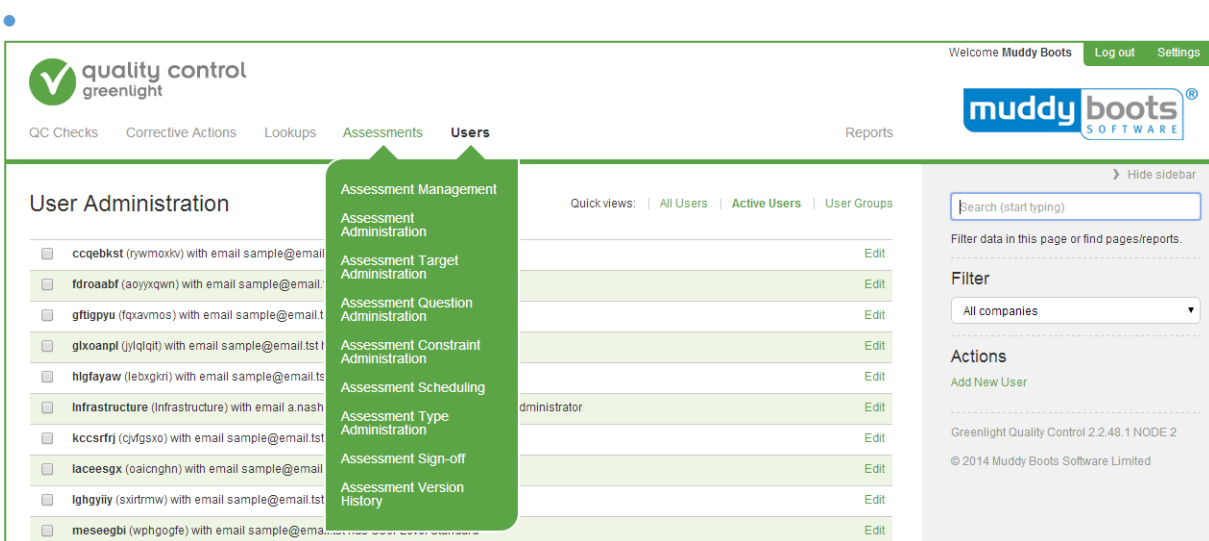
### ASSESSMENT MANAGEMENT

#### CHECK OUT AN ASSESSMENT

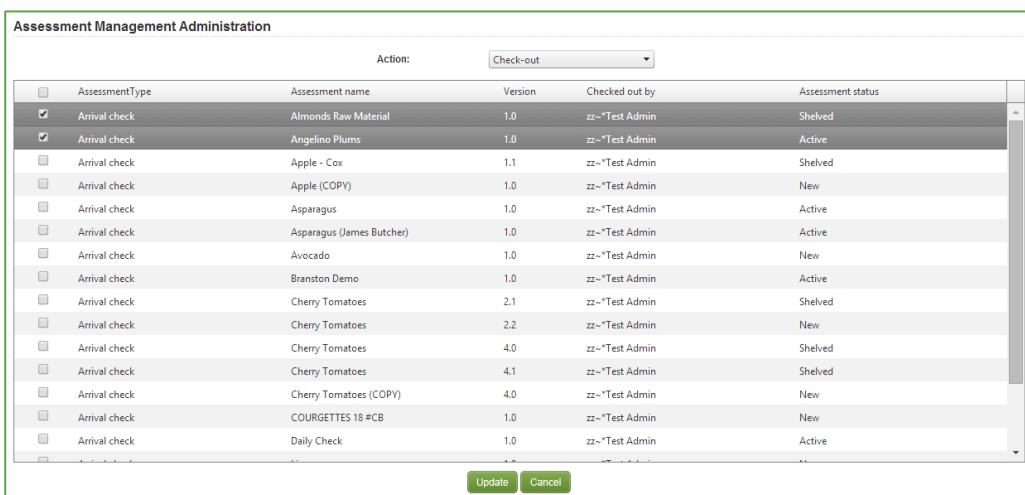
To work on an assessment it must be checked out to you. An assessment can only be checked out to one user at a time. This prevents more than one user from editing an assessment simultaneously and causing confusion.

**Please Note:** If you create a new assessment, it will be automatically checked out to you until you check it in.

- 1) Hover over **Assessments** in the menu and select **Assessment Management** from the submenu.



- 2) Ensure the **Action** field at the top of the screen shows **Check-out**. You will see a grid of all assessments available to check out. If the assessment you want to work on does not appear in this list, it might be checked out to you already or checked out to someone else.
- 3) Select the tick box to select one or more assessments.
- 4) Click **Update**.



The assessment will be checked out to work on. If you change the **Action** field to show **Check-in**, the assessment will display in that list.

### CHECK IN AN ASSESSMENT

To check in an assessment to make it available to other users:

- 1) Hover over **Assessments** in the menu and select **Assessment Management** from the submenu.
- 2) Change the **Action** field at the top of the screen to show **Check-in**. You will see a grid of all assessments checked out to you.
- 3) Select the tick box to select the assessment.
- 4) Click **Update**.

**Assessment Management Administration**

Action: Check-in

<input type="checkbox"/>	AssessmentType	Assessment name	Version	Checked out by	Assessment status
<input type="checkbox"/>	Arrival check	85vl Fresh Beef Trim	1.0	Muddy Boots	Active
<input type="checkbox"/>	Arrival check	AA Assessment	1.0	Muddy Boots	Active
<input checked="" type="checkbox"/>	Arrival check	Angelino Plums	1.0	Muddy Boots	Active
<input type="checkbox"/>	Arrival check	Apples - Jazz	1.0	Muddy Boots	New
<input type="checkbox"/>	Arrival check	Apples - Organic Braeburn	1.0	Muddy Boots	Active
<input type="checkbox"/>	Arrival check	Asparagus	1.0	Muddy Boots	Active
<input type="checkbox"/>	Arrival check	Bakery QuPig Template	1.0	Muddy Boots	Active
<input type="checkbox"/>	Arrival check	Cherry Tomatoes	5.0	Muddy Boots	Active
<input type="checkbox"/>	Arrival check	Giraffe Bloomer 800g	1.0	Muddy Boots	Active
<input type="checkbox"/>	Arrival check	Morrisons Fresh Beef Trim 612 85VL	1.0	Muddy Boots	Active
<input type="checkbox"/>	Arrival check	O'Hanlon Intake cut herbs	1.0	Muddy Boots	Active
<input type="checkbox"/>	Arrival check	Valley Produce Test	1.0	Muddy Boots	Active
<input type="checkbox"/>	Arrival check	Vitacress	1.0	Muddy Boots	Active
<input type="checkbox"/>	Arrival check	Wellpak Incoming Quality Report	1.0	Muddy Boots	Active
<input type="checkbox"/>	Dispatch check	Staples Positive Release	1.0	Muddy Boots	Active

Update Cancel

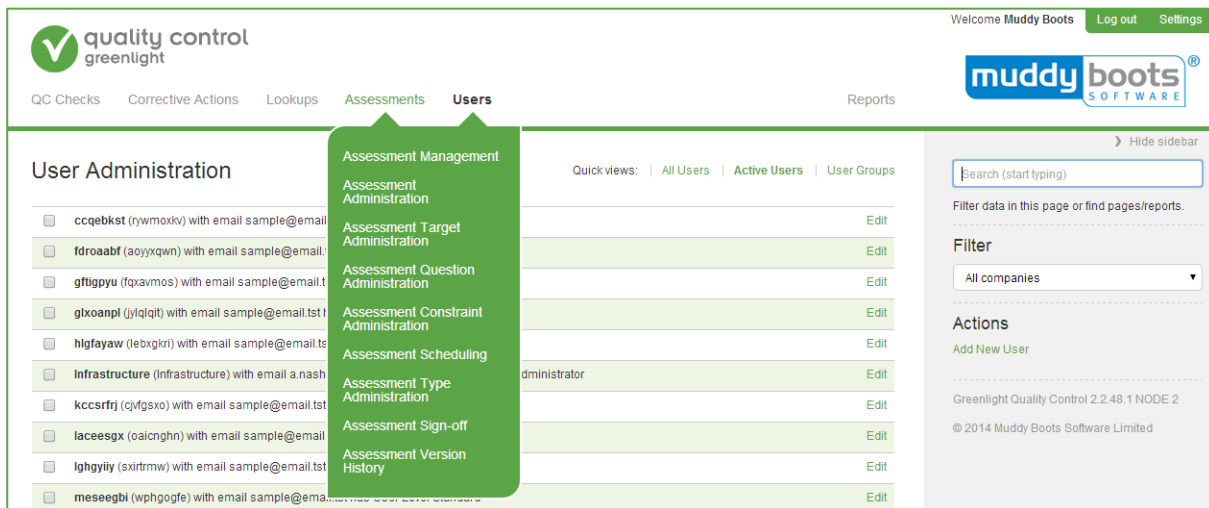
The assessment will be checked in. If you change the **Action** field to show **Check-out**, the assessment will display in that list.

## ASSESSMENT ADMINISTRATION

### CREATE A NEW ASSESSMENT

To create a new assessment in the **Assessment Administration** screen:

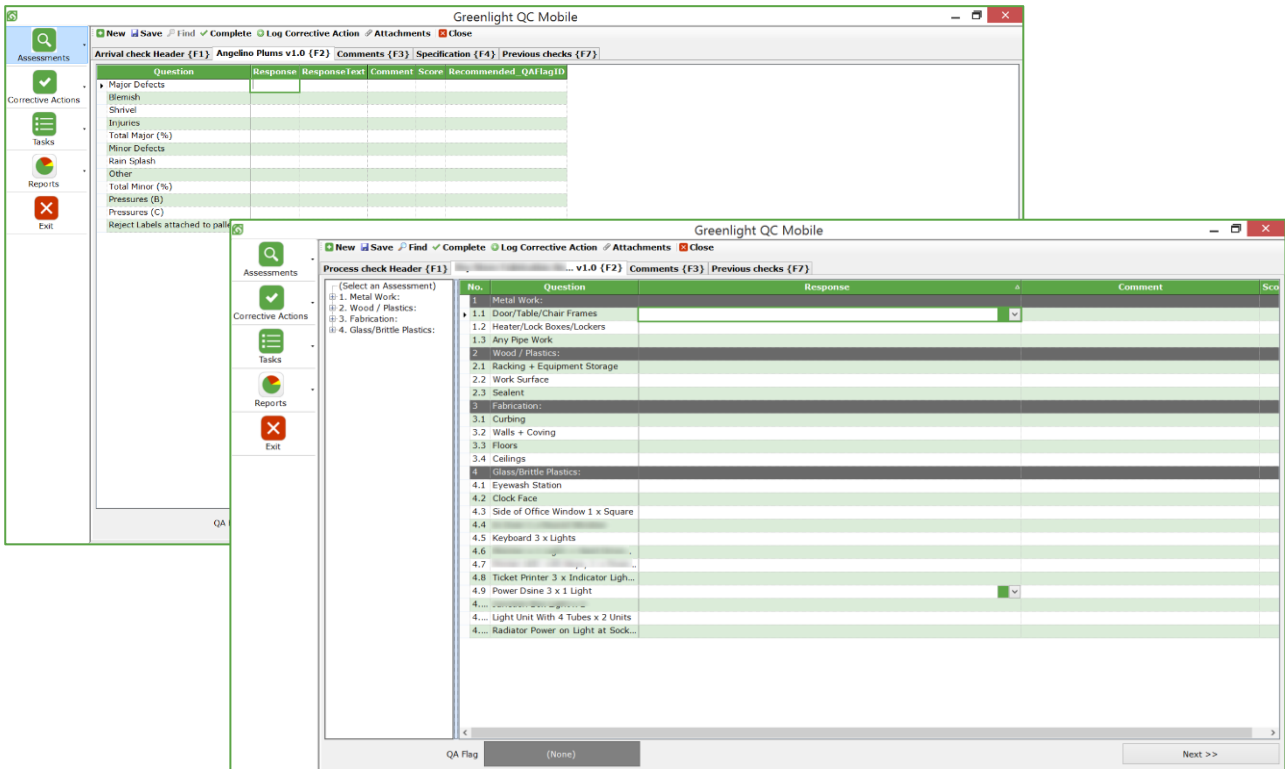
- 1) Hover over **Assessments** in the menu and select **Assessment Administration** from the submenu.



- 2) Scroll down and under **Add An Assessment**, enter the following data, where required:
  - a) **Assessment Type** – Select which type of assessment you want to create. The type of assessment will determine which questions are shown in the header tab of the assessment when it is completed in Greenlight QC Mobile.
  - b) **Assessment Name** - The title or name for the assessment.
  - c) **Assessment Description** - Any further descriptive text you want to apply to this assessment.
  - d) **Assessment Target Type** - This defines what you are targeting with this assessment. You can select one of the following options (or leave blank for no target):
    - **Stock code (or product)** – Indicates you are assessing a product, either in raw or packed form.
    - **Location** – Indicates you are assessing a location, for example a depot, pack-house, production area or cold store.
  - e) **Version** - The version number of the assessment.
  - f) **Valid From and Valid To** - Enter dates here if you want the assessment to only be available temporarily between certain dates. For new assessments, you can add a date solely in the **Valid From** box so the assessment will not appear in QC Mobile until a certain date has passed.
  - g) **Auto-Expire** - Tick this check box if you want the assessment to be shelved when the **Valid To** date has been exceeded.
  - h) **Expiry Notification** - Select a user group to be notified once the **Valid To** date has been exceeded. The group will be notified daily starting from 2 days before the **Valid To** date is reached.
  - i) **Guidance** - This is a drop down list of guidance created in the **Guidance Administration** screen. Choose which to associate with this assessment.

- j) **Display Mode** - Choose how you would like the assessment to be viewed in Greenlight QC Mobile. You can choose either **Tree view**, **Flat view** or **Flat view (with Guidance)**. Below are examples of the same assessment in each mode shown in Greenlight QC Mobile. The tree view has a tree diagram of the questions on the left of the screen and the flat view with guidance shows the quick guidance text to the right of the question column.

- **Flat View in Mobile**



- **Tree View in Mobile**

- k) **Assessment Status** - This displays and allows you to edit the current status of the assessment. If you are creating a new assessment, leave the status as New.
- 3) Once complete, click **Save**.

**Add An Assessment**

---

<p>Assessment Type: <input type="text" value="Arrival check"/></p> <p>Assessment Name: <input type="text"/></p> <p>Description: <input type="text"/></p> <p>Target Type: <input type="text" value="Select Assessment Target Type"/></p> <p>Version: <input type="text" value="1.0"/></p> <p>Valid From: <input type="text"/></p> <p>Valid To: <input type="text"/></p>	<p>Temp Assessment: <input type="checkbox"/></p> <p>Auto-Expire: <input type="checkbox"/></p> <p>Expiry Notification: <input type="text" value="Select Expiry Notification"/></p> <p>Guidance: <input type="text" value="Search items..."/></p> <p><input type="text" value="Select Guidance"/></p> <p>Display Mode: <input type="text" value="Flat view"/></p> <p>Assessment Status: <input type="text" value="New"/></p>
--	--

The newly created assessment will appear in the grid at the top of the screen.



## COPYING OR CREATING NEW VERSIONS OF AN ASSESSMENT

- 1) Hover over **Assessments** in the menu and select **Assessment Administration** from the submenu.
- 2) Click the edit button next to the assessment you want to copy or create a new version of.

**Please Note:** Only assessments checked out to you will appear in this screen. If the assessment you want does not appear, return to the **Assessment Management** screen and check it out.

### Assessment Administration

Edit	Assessment type	Assessment name	Assessment description	Assessment target type	Version	Temp assessment	Valid from	Valid to	Aut
	Arrival check	85vl Fresh Beef Trim		Stock code	1.0	<input type="checkbox"/>			<input type="checkbox"/>
	Arrival check	AA Assessment	DO NOT USE	Business group	1.0	<input type="checkbox"/>			<input type="checkbox"/>
	Arrival check	Angelino Plums		Stock code	1.0	<input type="checkbox"/>			<input type="checkbox"/>
	Arrival check	Apples - Jazz		Stock code	1.0	<input type="checkbox"/>			<input type="checkbox"/>
	Arrival check	Apples - Organic Braeburn		Stock code	1.0	<input type="checkbox"/>			<input type="checkbox"/>
	Arrival check	Asparagus		Stock code	1.0	<input type="checkbox"/>			<input type="checkbox"/>
	Intake (Multi-check)	Avocado Intake		Stock code	1.0	<input type="checkbox"/>			<input type="checkbox"/>
	Arrival check	Bakery QuPig Template		Business group	1.0	<input type="checkbox"/>			<input type="checkbox"/>
	Arrival check	Cherry Tomatoes		Stock code	5.0	<input type="checkbox"/>			<input type="checkbox"/>
	Shelf life test	Emma's Shelf Life check		Stock code	1.0	<input type="checkbox"/>			<input type="checkbox"/>

#### Edit Assessment

Assessment Type:	<input type="text" value="Arrival check"/>	Temp Assessment:	<input type="checkbox"/>
Assessment Name:	<input type="text" value="Angelino Plums"/>	Auto-Expire:	<input type="checkbox"/>
Description:	<input type="text"/>	Expiry Notification:	<input type="text" value="Select Expiry Notification"/>
Target Type:	<input type="text" value="Stock code"/>	Guidance:	<input type="text" value="Search items..."/>
Version:	<input type="text" value="1.0"/>		<input type="text" value="Select Guidance"/>
Valid From:	<input type="text"/>	Display Mode:	<input type="text" value="Flat view"/>
Valid To:	<input type="text"/>	Assessment Status:	<input type="text" value="Make Active"/>

Function:

- 3) Scroll to the bottom of the screen and select one of the following options from the **Function** box:
  - **Copy to New Assessment** – This will copy the selected assessment but the new assessment will be completely separate and will have a version number of 1.0.
  - **Create New Version** – This will copy the selected assessment and the two assessments will be linked. The new assessment will have a version number of 1 more than the copied assessment.
  - **Create Temporary Assessment** - This will copy the selected assessment and the two assessments will be linked. The new assessment will have a version number of 0.1 more than the copied assessment. You will be able to specify the date the temporary assessment expires in the **Valid To** date box that appears.
- 4) Click **Go**.

Version:

Valid From:

Valid To:

Display Mode:

Assessment Status:

Function:

## ASSESSMENT QUESTION ADMINISTRATION

After you have created or checked out an assessment, you can add questions. Questions need to be added to the **Question Administration** screen first.

### ADDING OR EDITING QUESTIONS IN AN ASSESSMENT

- 1) Hover over **Assessments** in the menu and select **Assessment Question Administration** from the submenu.
- 2) On the right of the screen, select the assessment type and assessment under **Filters**.
- 3) Click Add a Question.

**Please Note:**

- Only assessments checked out to you will be available for you to select. Therefore, if the assessment does not appear, return to the **Assessment Management** screen to check it out.
- You can add all questions that have been labelled as default in the **Question Administration** screen by clicking the **Fill Default Questions** button.

Assessment Question Administration Expand all | Collapse all

Angelino Plums v1.0

SELECT	NO.	QUESTION	DATA TYPE	LEVEL	GUIDANCE	SAMPLE SUMMARY	EDIT
<input checked="" type="checkbox"/>	1	Major Defects	Yes/No	None			Edit
<input type="checkbox"/>	1.1	Blemish	Numeric (Decimal)	None	Enter %		Edit
<input type="checkbox"/>	1.2	Shrivel	Numeric (Decimal)	None	Enter %		Edit
<input type="checkbox"/>	1.3	Injuries	Numeric (Decimal)	None	Enter %		Edit
<input type="checkbox"/>	1.4	Total Major (%)	Numeric (Decimal)	None		Average	Edit
<input type="checkbox"/>	2	Minor Defects	Yes/No	None			Edit
<input type="checkbox"/>	2.1	Rain Splash	Numeric (Decimal)	None	Enter %		Edit
<input type="checkbox"/>	2.2	Other	Numeric (Decimal)	None	Enter %		Edit
<input type="checkbox"/>	2.3	Total Minor (%)	Numeric (Decimal)	None		Average	Edit
<input type="checkbox"/>	3	Pressures (B)	Numeric (Decimal)	None		Average	Edit
<input type="checkbox"/>	4	Pressures (C)	Numeric (Decimal)	None		Average	Edit
<input type="checkbox"/>	5	Reject Labels attached to pallets?	Yes/No	None			Edit

Search (start typing)

Filter data in this page or find pages/reports.

**Filters**

Arrival check

Angelino Plums v1.0

**Actions**

[View Spec](#)

[Add a Question](#)

[Fill Default Questions](#)

[Add Constraints](#)

[Remove Question](#)

Greenlight Quality Control 2.2.46.22 NODE 8

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- 4) Select the question from the question box. This will pull through information associated with that question from the **Question Administration** screen.
- 5) Edit any data in the other fields to customise this question. This will NOT change the question in the **Question Administration** screen.

### Add Question

Arrival check / Angelino Plums v1.0

<p><b>Question Items</b></p> <p><b>Question Number</b> 6</p> <p><b>Question</b> Select a Question</p> <p><b>Sub Question Of</b> Select a Question</p> <p><b>Guidance</b></p> <p><b>Guidance</b> Filter (start typing) Select Guidance View Guidance</p> <p><b>Quick Guidance</b></p> <p><b>Samples</b> <input type="checkbox"/> Allow Samples</p>	<p><b>Data Type</b></p> <p><b>Data Type</b> Select a Data Type</p> <p><b>Question Level</b> None</p> <p><b>Formulae</b></p> <p><b>Response Formula</b></p> <p><b>Score Formula</b></p> <p><b>Other</b></p> <p><input type="checkbox"/> Response Required <input type="checkbox"/> Guidance Required <input type="checkbox"/> Hide <input type="checkbox"/> Hide from Reports</p>	<p>Search (start typing)</p> <p>Filter data in this page or find pages/reports.</p> <p><b>Change Assessment</b></p> <p>Arrival check Angelino Plums v1.0</p> <p><b>Actions</b></p> <p>Save Save and Add Another Question Clear Back</p> <p>Greenlight Quality Control 2.2.46.22 NODE 8 © 2014 Muddy Boots Software Limited</p>
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Save Save and Add Another Question Clear Back

Enter data in the following fields if required:

- **Question Number** - This sets the order of the questions in the assessment.
- **Sub-Question Of** - Select the question or question group that your question should be a sub-question of. This creates hierarchy and groups in your assessment.
- **Data type** - This is the type of response allowed for this question.
- **Question Level** - This is used for grouping questions together to determine whether the overall assessment will pass or fail based on that group of questions.
- **Guidance** - Link guidance to a question by searching and selecting from the drop-down. For example, this could be visual guidance to illustrate the defect or attribute being assessed. Guidance needs to be set up in the **Guidance Administration** screen before it will appear in this drop-down. Click the **View Guidance** button to check you have linked in the correct guidance.
- **Quick Guidance** - Text added here will appear in QC Mobile to guide the user in answering this question.
- **Allow Samples** - Tick this check box if you want the user to take several samples to answer this question. This only applies if the data type is numeric.
- **Sample Summary** - If you have selected the **Allow Samples** option, this field indicates how the samples should be summarised to result in the single response for the question. If you leave this blank, the user will be able to choose the summary when they have entered the samples in QC Mobile.
- **Sample Data Type** - You will see this field if your question data type is NOT numeric or Yes/No. This field allows you to stipulate the data type of the samples that need to be collected.
- **List Samples of Report** - Tick this if you want to include the individual samples on the QC Check report. If you leave this unticked, only the sample summary will show.

- **Response Formula and Score Formula** - These are used for entering formulas which will calculate the response or score for this question.
- **Score Calculation** - You can choose one of these options to determine how the score is calculated if applicable:
  - **Response is score** – This will make the response to the question the score. Only applicable to numeric questions.
  - **% of sample size** – You will also need to add the system question, “Sample Count” to your assessment to use this option. Greenlight Quality Control will take the response to this question and convert it into a percentage by referring to the number of samples (captured in the sample count question). Only applicable to numeric questions.
  - **Formula** – Select this option if you are entering a formula in the **Score Formula** box.
- **Response Required** - Ticking this check box makes the question mandatory.
- **Hide** – To hide this question from the assessment in QC Mobile.
- **Hide from reports** - Tick this if you want the answers to this question to not be shown in QC Check reports.

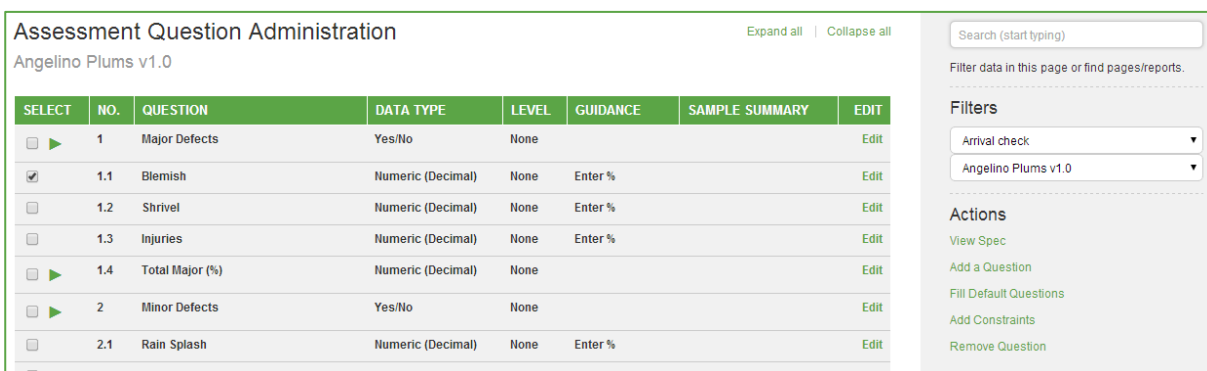
**Please note:** You cannot build a formula that adds together the scores for other questions.

- 6) When you have entered all necessary data, click **Save** or **Save and Add Another Question**.

#### ADDING CONSTRAINTS AND CORRECTIVE ACTIONS TO A QUESTION

When you have added questions to an assessment, you can add constraints for each question to show what equates to a red, amber or green response. You can also add a score to each constraint. The individual scores can be used to define the overall QA flag in the **Assessment Constraints Administration** screen.

- 1) Hover over **Assessments** in the menu and select **Assessment Question Administration** from the submenu.
- 2) Select the Assessment Type and Assessment.
- 3) Tick the check box next to the question you want to add constraints to.
- 4) Click **Add Constraints** from the **Actions** menu.



SELECT	NO.	QUESTION	DATA TYPE	LEVEL	GUIDANCE	SAMPLE SUMMARY	EDIT
<input type="checkbox"/>	1	Major Defects	Yes/No	None			Edit
<input checked="" type="checkbox"/>	1.1	Blemish	Numeric (Decimal)	None	Enter %		Edit
<input type="checkbox"/>	1.2	Shrivel	Numeric (Decimal)	None	Enter %		Edit
<input type="checkbox"/>	1.3	Injuries	Numeric (Decimal)	None	Enter %		Edit
<input type="checkbox"/>	1.4	Total Major (%)	Numeric (Decimal)	None			Edit
<input type="checkbox"/>	2	Minor Defects	Yes/No	None			Edit
<input type="checkbox"/>	2.1	Rain Splash	Numeric (Decimal)	None	Enter %		Edit
<input type="checkbox"/>	2.2	Other	Numeric (Decimal)	None	Enter %		Edit

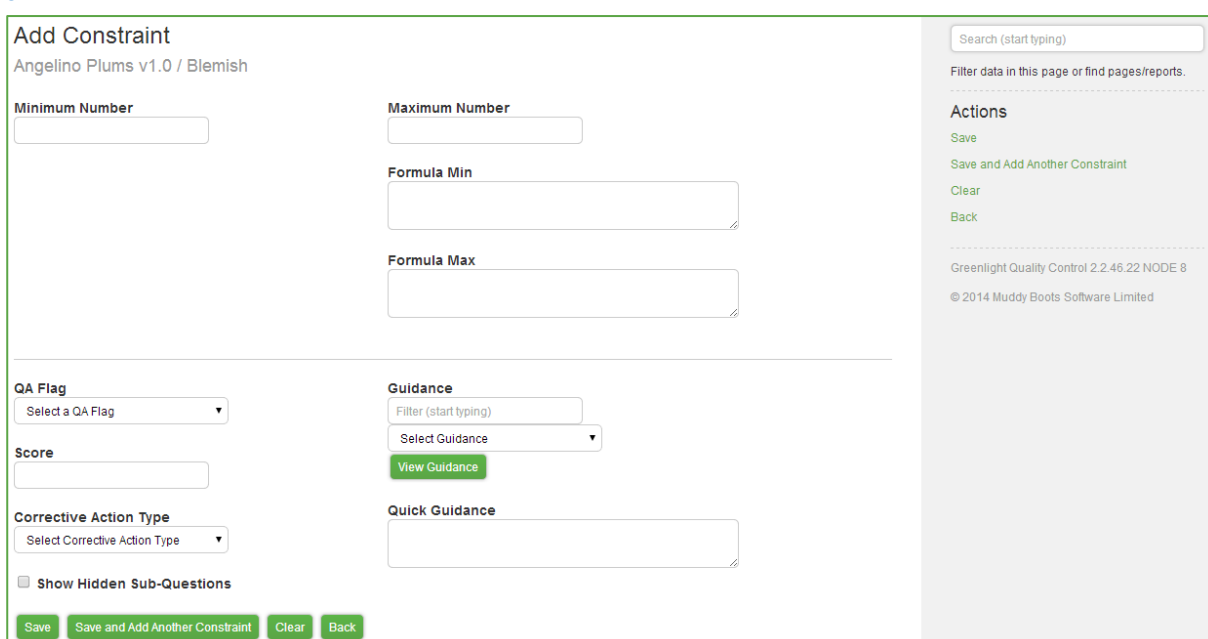
- 5) Enter information for the first constraint, including:
  - a) **Item constraint** - Choose the response given by the user (e.g. if you have a numeric question, you need to enter minimum and maximum numbers).
  - b) **QA Flag** - Specifies whether the constraint has a red / amber / green rating.

- c) **Score** - Enter a score for the constraint which will be deducted from the overall assessment score if the question response falls within this constraint.
- d) **Guidance** - Select guidance from the **Guidance Administration** area to link to this constraint. Guidance needs to be created in the **Guidance Administration** screen before it will appear in the drop-down.
- e) **Quick Guidance** - A text entry of specific guidance for this response constraint can be entered here. This will be displayed in QC Mobile in the guidance text if you select guidance in the **Guidance** field as well.
- f) **Corrective Action Type** - Select a **Corrective Action type** (as created in the **Escalation Process Administration** screen) to be triggered if the question response falls within this constraint.

**Please Note:** Depending on the data type of your question, you may also see some of the following options:

- **Text Constraint** - For short text or long text questions, you can specify text in this box. Greenlight QC will check the response entered by the user to see if it matches.
- **Check first** - For short text or long text questions, you can specify a number of letters to be checked from the response given by the user.
- **Maximum Number** and **Minimum Number** - For numeric questions, you can specify a value range.
- **Yes / No Constraint** - You can choose yes or no question responses.
- **Minimum Date** and **Maximum Date** - For date questions, you can specify a date range.
- **Date Lookup** – This option allows you to compare the date entered for this question with one of the options from this Date Lookup list (e.g. arrival date, depot date, DU date).
- **Min Date +** and **Max Date +** - To be used for date questions in conjunction with the date lookup option. This allows you to specify a range when comparing the question response date to the date selected in the date lookup box.

6) Once complete, click **Save** or Save and **Add Another Constraint**.



**Add Constraint**  
Angelino Plums v1.0 / Blemish

Minimum Number

Maximum Number

Formula Min

Formula Max

---

QA Flag

Guidance

Score

Corrective Action Type

Show Hidden Sub-Questions

Search (start typing)

Filter data in this page or find pages/reports.

**Actions**

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**Please Note:** When you return to the **Assessment Question Administration** screen, you will see the constraints for each question by clicking the green '>' arrow.

Assessment Question Administration Expand all | Collapse all

Angelino Plums v1.0

SELECT	NO.	QUESTION	DATA TYPE	LEVEL	GUIDANCE	SAMPLE SUMMARY	EDIT
<input type="checkbox"/>	1	Major Defects	Yes/No	None			Edit
SELECT	ITEM CONSTRAINT	QA FLAG	SCORE	GUIDANCE	CORRECTIVE ACTION TYPE	EDIT	
<input type="checkbox"/>	Yes	Red				Edit	
<input type="checkbox"/>	No	Green				Edit	
<input type="checkbox"/>	1.1	Blemish	Numeric (Decimal)	None	Enter %	Edit	
<input type="checkbox"/>	1.2	Shrivel	Numeric (Decimal)	None	Enter %	Edit	

Search (start typing)

Filter data in this page or find pages/reports.

**Filters**

Arrival check

Angelino Plums v1.0

**Actions**

View Spec

Add a Question

Fill Default Questions

### HIDING QUESTIONS SO THEY ONLY APPEAR AFTER A SPECIFIC RESPONSE

You can create assessments so that sub-questions are revealed when the parent question is answered with a specific response; all other responses will leave the question hidden. To do this:

- 1) Ensure the question(s) to be hidden is a sub-question of the parent question.

<input type="checkbox"/>	<input checked="" type="checkbox"/>	5	Appearance - Colour	Yes/No	Standard	Edit
<input type="checkbox"/>		5.1	Appearance - Shape	Yes/No	Standard	Edit

- 2) Edit each sub-question and tick the Hide box:

**Samples**

Allow Samples

**Other**

Response Required

Guidance Required

Hide

Hide from Reports

Save
Save and Add Another Question
Clear
Back

- 3) Add constraints (including a QA Flag) to the parent question and tick the “Show Hidden Sub-Questions” check box:

**QA Flag**

Green

**Score**

0

**Corrective Action Type**

Select Corrective Action Type

Show Hidden Sub-Questions

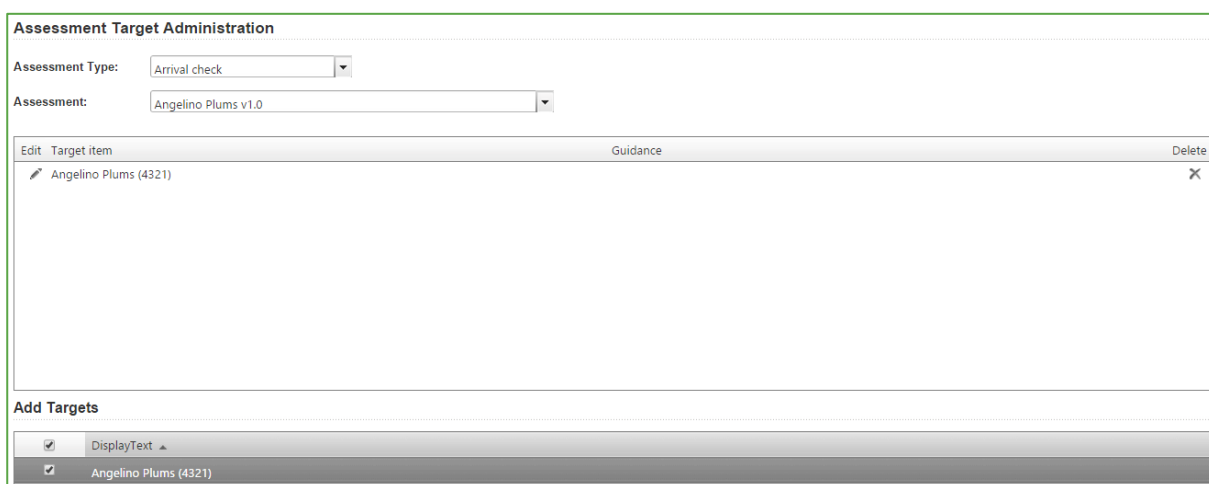
Save
Save and Add Another Constraint
Clear
Back

- 4) Press Save.

## ASSESSMENT TARGET ADMINISTRATION

Targeting allows you to link an assessment to a product (or location). When the user enters that target in QC Mobile, the correct assessment will be available to them without the need to search. The list of targets shown will be based on the target type associated with the assessment when it is created in **Assessment Administration**. To add a target to an assessment:

- 1) Hover over **Assessments** in the menu and select **Assessment Target Administration** from the submenu (it is not possible to target a facility assessment).
- 2) Select the **Assessment Type** and **Assessment** from the fields at the top of the screen. The assessments shown in this drop-down will be those checked out to you. Therefore, if the assessment you want is not listed, follow the process to ensure it is checked out to you.
- 3) Select a target (or targets) from the list under **Add Targets**.



**Assessment Target Administration**

Assessment Type:

Assessment:

Edit	Target item	Guidance	Delete
	Angelino Plums (4321)		

**Add Targets**

- DisplayText ▲
- Angelino Plums (4321)

- 4) Click **Save**.

## TARGETING GUIDANCE TO AN ASSESSMENT

You can target specific guidance to a stock code relating to an assessment through **Assessment Target Administration**. To target guidance to a stock code:

- 1) Click the edit icon next to the stock code (pencil); the **Edit Target Details** option appears underneath the table.
- 2) Search for the guidance you need using the search box (this is stored in **Guidance Administration**, which can be found under the **Lookups** tab).
- 3) Select the relevant guidance.
- 4) Click **Save**.

**Assessment Target Administration**

Assessment Type:

Assessment:

Edit	Target item	Guidance	Delete
	Angelino Plums (4321)		

**Edit Target Details for Angelino Plums (4321)**

Guidance:

**Add Targets**

DisplayText

In the **Assessment Target** table, there is a **Guidance** column; your chosen guidance is now visible in the table.

Edit	Target item	Guidance	Delete
	Angelino Plums (4321)	Plums guidance	

### ASSESSMENT CONSTRAINT ADMINISTRATION

Assessment constraints are created to determine the overall QA flag for a completed check, based on the cumulative scores from the question responses (i.e. which overall assessment scores equate to red, amber and green overall QA flag).

Assessment constraints are created per question level (i.e. minor, major or critical) and each question can have a question level stated (in the **Assessment Question Administration** screen). To add a constraint to an assessment:

- 1) Hover over Assessments in the menu and select Assessment Constraint Administration.
- 2) Select the **Assessment Type** and **Assessment** from the fields at the top of the screen.
- 3) Scroll to below the grid and add constraints by completing the fields:
  - a) **Constraint type** - Select whether you are applying the constraint to the overall score of the assessment or total minor, major or critical question scores.
  - b) **Minimum Score** and **Maximum Score** - Enter the minimum and maximum score of the overall assessment constraint.
  - c) **QA Flag** - Add a red, amber or green flag to show what this range of scores signifies.
  - d) **Guidance** - Select guidance (as set up in the **Guidance Administration** screen).
  - e) **Corrective Action type** - Add a corrective action which will be shown in QC Mobile if an assessment is completed within this constraint. Corrective actions are created in the **Escalation Process Administration** screen.
  - f) **Date Lookup** - (For questions where the data type is date) Choose the date you want to compare the response with.
  - g) **Min Date +** - (For questions where the data type is date) Enter the minimum number of days.



- h) **Max Date + -** (For questions where the data type is date) Enter the maximum number of days.
- 4) Click **Save**.

**Assessment Constraint Administration**

Assessment Type:

Assessment:

Edit	Constraint type	Minimum score	Maximum score	QA flag	Guidance description	Corrective Action type	Delete
	Overall score	0	0	Green			X
	Overall score	1	99	Amber			X
	Overall score	100		Red			X

**Add Constraint**

Constraint Type:  QA Flag:

Minimum Score:  Guidance:

Maximum Score:  Select Guidance:

Corrective Action Type:

### MAKING AN ASSESSMENT ACTIVE AND ASSESSMENT SIGN-OFF

To make an assessment available for use in Greenlight QC Mobile, its status must be Active and (if required) Signed-off (the latter is optional).

New or Shelved assessments will not be available for use in QC Mobile until they are made Active. This allows you to work on an assessment before releasing it for use.

### MAKE AN ASSESSMENT STATUS ACTIVE

- 1) Hover over **Assessments** in the menu and select **Assessment Management**.
- 2) Change the **Action** field at the top of the screen to show **Make active**.
- 3) All assessments checked out to you that have a status of New or Shelved are listed.
- 4) Tick the check box next to the relevant assessment.
- 5) Click **Update**.

**Assessment Management Administration**

Action:

<input type="checkbox"/>	AssessmentType	Assessment name	Version	Checked out by	Assessment status
<input checked="" type="checkbox"/>	Arrival check	Apples - Jazz	1.0	Muddy Boots	New
<input type="checkbox"/>	Label check	Example Label Check	1.0	Muddy Boots	New

**Please Note:** The assessment will be sent for Sign-Off if this function has been activated; if not, the assessment will be Active immediately.

## SIGN-OFF AN ASSESSMENT

---

This is an optional feature, which, if activated, will apply to all assessments of an assessment type.

- 1) Hover over **Assessments** in the menu, and select **Assessment Sign-off**.
- 2) Select the **Assessment Type** from the drop-down at the top of the screen.
- 3) The grid will populate with all assessments of that type that are awaiting sign-off.
- 4) Tick the check box next to an assessment, and then:
  - a) Click the **View New Spec** or **View Previous Spec** buttons to review the assessment specifications; **View Previous Spec** will only be available if a previous linked version of the assessment exists. Assessment specifications will open in a new window.
  - b) Click **Reject Changes** or **Sign-off Assessments** buttons.

**Reject Changes** will change the assessment status to Shelved. The assessment will need amending and its status changing to Active again before submitting for sign-off again.

**Sign-off Assessments** changes the assessment status to Active and makes it available for use in Greenlight QC Mobile.

## ASSESSMENT SCHEDULING

You can schedule assessments so they are completed within a set period. Notifications can be sent to a notification group to prompt them to complete the assessment(s). The system allows you to issue notifications to different users/groups should the assessment(s) not be completed as scheduled. To set up a new schedule:

- 1) Hover over **Assessments** in the menu and select **Assessment Scheduling**.
- 2) Select the **Assessment Type** and **Assessment** from the drop-down options. The assessments shown in these drop-down lists will only be those checked out to you.
- 3) Scroll to below the grid and under the heading **Add An Assessment Schedule**, the following data is required:
  - a) **Schedule Type** - Choose **Schedule every** (schedule one assessment to be completed in a set period) or **Complete quantity every** (schedule a set quantity of assessments to be completed in a set period).
  - b) **Quantity required** - You will only be able to edit this field if you select **Complete quantity every** as the schedule type. Enter the number of assessments you want completed within the period.
  - c) **Deadline interval** (enter integer) and **Interval Unit** (choose minute / hour / day / week) - Enter the period.
  - d) **Days of Week** – Select which days you want to schedule for.
  - e) **Start Time** and **Finish Time** - Use these values to specify if the assessment is only applicable during certain hours of the day.
  - f) **Request Notification** - Choose the user group to be notified to complete these assessments. This will appear as a task for them to complete in Greenlight QC Mobile.
  - g) **Owner Notification** - Choose the user group to notify if these assessments are not completed within this schedule.
- 4) Click **Save**.

**Assessment Scheduling**

Assessment Type:  Assessment:

Edit	Schedule type	Quantity required	Deadline interval	Interval unit	Start time	Finish time	Days of week	Request notification	Owner notification	Delete
No records to display.										

**Add An Assessment Schedule**

Schedule Type:  Start Time:

Quantity Required:  Finish Time:

Deadline Interval:  Request Notification:

Interval Unit:  Owner Notification:

Days Of Week:

The schedule will appear in the grid. You can add more than one schedule per assessment.

### ASSESSMENT VERSIONING

Previous versions of assessments can be viewed in the **Assessment Version History** screen. Assessments listed there include those that have an Archived status. Archived assessments can be restored from this screen, if required:

- 1) Click Assessments in the menu and select Assessment Version History.
- 2) Choose the **Assessment Type** and **Assessment** from the fields at the top of the screen.
- 3) The grid will populate with all versions of this assessment.
- 4) To restore an archived assessment version, click the **Restore** button (to the right of the selection).

**Assessment Version History**

Assessment Type:  Assessment:

Valid from	Valid to	Assessment status	Modified date	Modified by	Checked out by	Question changes	Restore	Delete
		Active	30/07/2014 12:35:04	zz--*Test Admin	Muddy Boots		<input type="button" value="Restore"/>	<input type="button" value="Delete"/>

This will change the assessment status to Shelved.

## ASSESSMENT HEADER

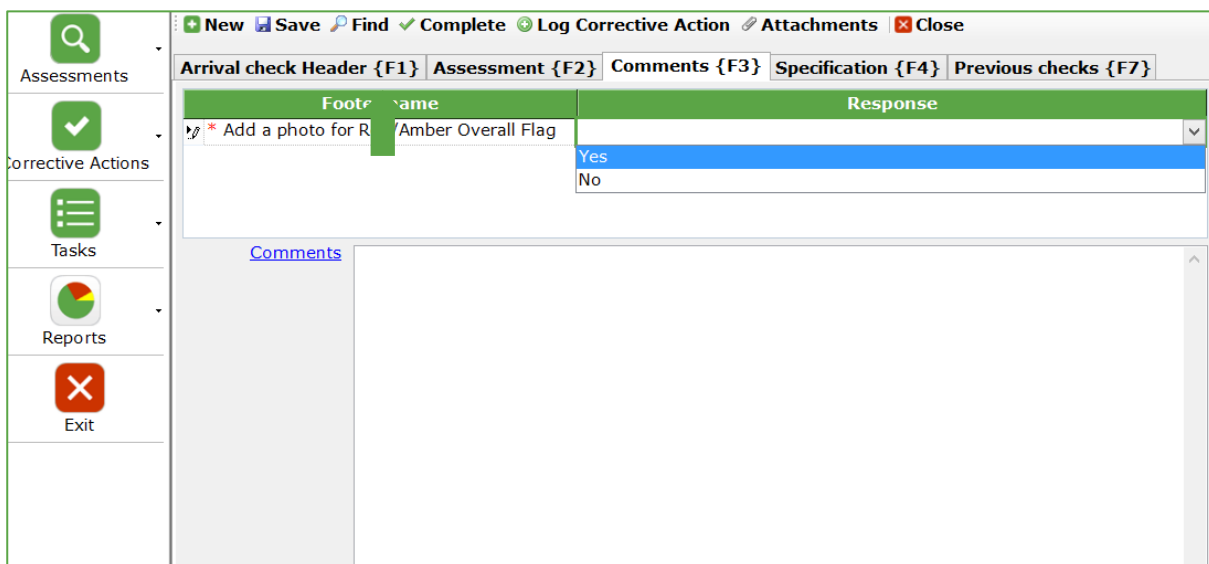
Muddy Boots create the questions that appear in the header tab of QC Mobile; it may be possible to change these, if required. In addition to the individual questions, you have the following configuration options:

- 1) Choose whether a user can copy a previously completed arrival header and select which individual questions should be copied.
- 2) Choose which questions are mandatory and which are optional.
- 3) Set the order of the questions.
- 4) Choose which questions to match for a re-check.
- 5) Choose which questions should retain their last response for the next check.

Contact Muddy Boots to change any of these configuration options.

## ASSESSMENT FOOTER

The assessment footer enables questions to be set up that appear on the Comments tab in QC Mobile when a user is completing a check.



Footer Name	Response
* Add a photo for R	
Amber Overall Flag	<div style="border: 1px solid black; padding: 2px;"> <span style="background-color: #007bff; color: white; padding: 2px;">Yes</span> <span style="padding: 2px;">No</span> </div>

These questions can also be answered or edited in **QC Actions** of QC Mobile. Muddy Boots create these questions; if you need to add specific questions to your assessments, contact Muddy Boots.

## QC CHECKS

### VIEW QC CHECKS AND VIEW QC CHECK DETAILS SCREENS

View completed checks in the **View QC Checks** and **View QC Check Details** screens:

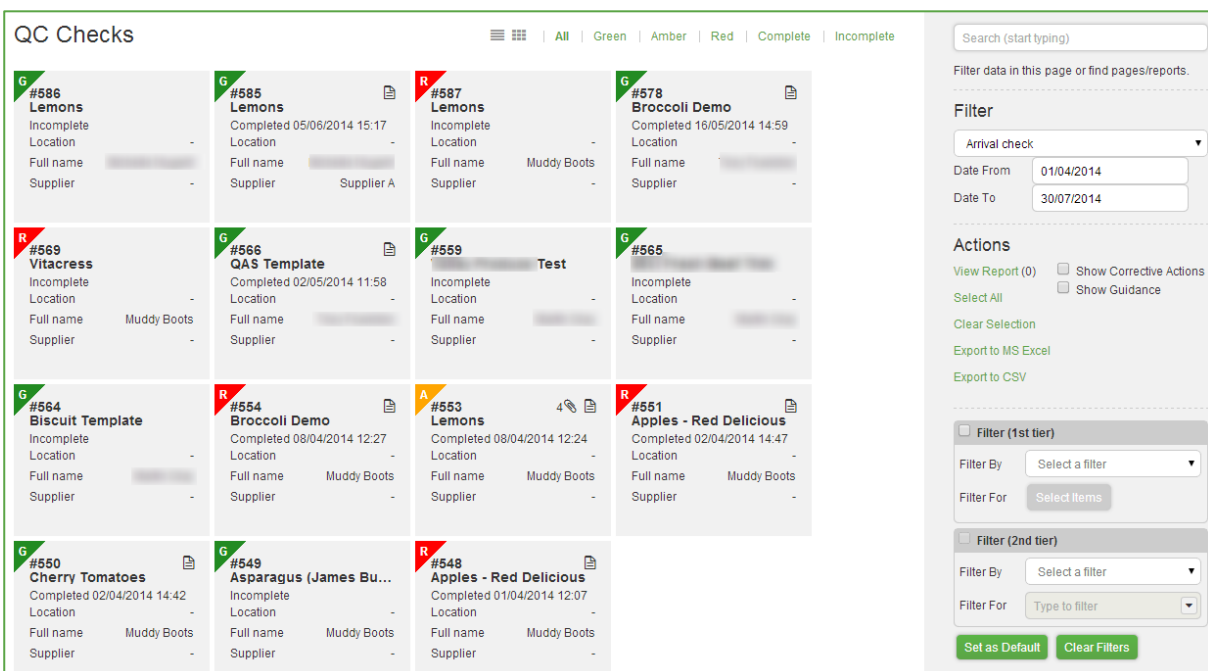
- **View QC Checks** will display the overall result of a QC check.
- **View QC Check Detail** will display the results of each question within each completed assessment.
- All completed assessments / questions are colour coded in line with their QC score.

### View QC Checks

1) Hover over **QC Checks** in the menu and select **View QC Checks**.



- 2) At the top of the screen, use the quick links to change your view to display **All** checks (green, amber, red, complete and incomplete checks). The page automatically populates the relevant assessments.
- 3) View checks as a list or in a 'tile' format by clicking on the icons.
- 4) If required, you can export this data to Excel or CSV by clicking the export options from the actions menu.
- 5) Click on a tile/row to select a check, or search for the desired check using the search box on the top right.
- 6) Click on the report icon to load the full detail QC Check Report of the selected QC check.
- 7) Click on the paper clip icon to preview and download images attached to the QC Check.



## View QC Check Details

- 1) Hover over **QC Checks** in the menu and select **View QC Check Detail**.

**View QC Check Detail**

View:

Date From:

Date To:

RAG	Check ID	Assessment name	Supplier	Stock code	Location	End date	Overall QA flag	Question	Que
●	586	Lemons		Lemons (3)		05/06/2014 15:18	Green	Packaging Standards*	Non
●	586	Lemons		Lemons (3)		05/06/2014 15:18	Green	Tray/Punnet/Pack	Non
●	586	Lemons		Lemons (3)		05/06/2014 15:18	Green	Film (if applicable)	Non
●	586	Lemons		Lemons (3)		05/06/2014 15:18	Green	Label	Non
●	586	Lemons		Lemons (3)		05/06/2014 15:18	Green	Print Quality & Coding	Non
●	586	Lemons		Lemons (3)		05/06/2014 15:18	Green	Shelf Life*	Non
●	586	Lemons		Lemons (3)		05/06/2014 15:18	Green	Min Life to Warehouse	Non
●	586	Lemons		Lemons (3)		05/06/2014 15:18	Green	Appearance*	Non
●	586	Lemons		Lemons (3)		05/06/2014 15:18	Green	Size	Non

Page size: 50 | 94 items in 2 pages

- 2) Choose which assessment type you would like to view checks for.
- 3) Select a date range for the checks you want to view.
- 4) Scroll right to see more details of each check.
- 5) If required, export the data to Excel or CSV by clicking the export options.

## QC ACTIONS

The **QC Actions** screen enables users to view a grid of completed checks and perform actions against these, such as **Overrule** and **update QAS Flag**. Suppliers and notification groups can be notified of these changes, if required.

- 1) Hover over **QC Checks** in the menu and select **QC Actions**.

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Welcome Muddy Boots | Log out | Settings

QC Checks | Corrective Actions | Lookups | Assessments | Users | Reports

View QC Checks | View QC Check Detail | **QC Actions** | Export Data

All | Announcements | Rejections | Corrective Actions | QAS

COMPLETED	DETAILS	VIEW
	High priority Corrective Action for isjswfnfghdysve was completed on 24/07/2014 14:25 /foifmksihatghd.idndffbsisvb	View

Search (start typing)

Filter data in this page or find pages/reports.

Favourite Actions  
Edit Favourites

- 2) Select the required check.
- 3) Select **Set Action** from the actions menu.

QC Checks | All | Green | Amber | Red | Complete | Incomplete

<b>#586</b> <b>Lemons</b> Incomplete Location - Full name - Stock code Lemons (3)	<b>#585</b> <b>Lemons</b> Completed 05/06/2014 15:17 Location - Full name - Stock code Lemons (3)	<b>#587</b> <b>Lemons</b> Incomplete Location - Full name Muddy Boots Stock code Lemons (3)
--	--	--

Search (start typing)

Filter data in this page or find pages/reports.

**Filter**

Arrival check ▼

Date From 17/05/2014

Date To 30/07/2014

---

**Actions**

View Report (1)  Show Corrective Actions

Select All  Show Guidance

Clear Selection

Export to MS Excel

Export to CSV

Set Action

- 4) Select an action.
- 5) Tick whether to notify the supplier, assessor and/or group.
- 6) Update the QA flag
- 7) Add any relevant comments.
- 8) Click **Save**.

**Set Action**  
Check #586 Lemons

**Action**

Void check ▼

**Update QA Flag**

Green ▼

**Comments**

Product meets specification

Save Back

**Notifications**

Notify Supplier

Notify Assessor

Notify Group

Search (start typing)

Filter data in this page or find pages/reports.

**Actions**

Save

Back

---

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## EXPORT DATA

Data can be exported from the **Export Data** screen to Excel. Three types of export are available:

- 1) **QC Check Summary** - This provides top level details of each check completed between chosen dates. This is similar to View QC Checks but you are able to export a larger volume of data.
- 2) **QC Check Detail** - This provides details of each question for each check completed between chosen dates. This is similar to the View QC Check Details screen but you are able to export a larger volume of data.
- 3) **RAG analysis** - This provides data on the number of checks per week of the year, including the number that were red, amber or green overall.

To export this data:

- 1) Hover over **QC Checks** in the menu and select **Export Data**.
- 2) Select the **Export Type** required.
- 3) Select the Assessment type.
- 4) Choose the dates.
- 5) Click Excel Export.

**Data Export**

Export Type: QC Check Summary ▼

Assessment type:

Arrival check  
 Grading (Multi-check)  
 In-Process check  
 Intake (Multi-check)  
 Label check  
 Dispatch check  
 Shelf life test  
 Taste Panel Check

Date From: 23/07/2014

Date To: 30/07/2014

## CORRECTIVE ACTIONS

Assessments can be configured to automatically trigger a corrective action following a non-compliance whilst a QC Check is being completed in QC Mobile (see **Escalation Process Administration** section). It is also possible to log ad hoc corrective actions in both Greenlight QC Mobile and QC Office. These will not be linked to an assessment but can be viewed in the relevant screens and signed-off or rejected.

### CORRECTIVE ACTION STATUSES

When a corrective action is created, it will have a status of New. This can be changed to In Progress or Completed. When it has been completed, the status should be changed to Signed-Off or Rejected.

To view and edit corrective actions, go to the **Corrective Action Manager** screen. The corrective actions displayed are determined by the user's data permissions that have been set in the user permission administration screen.



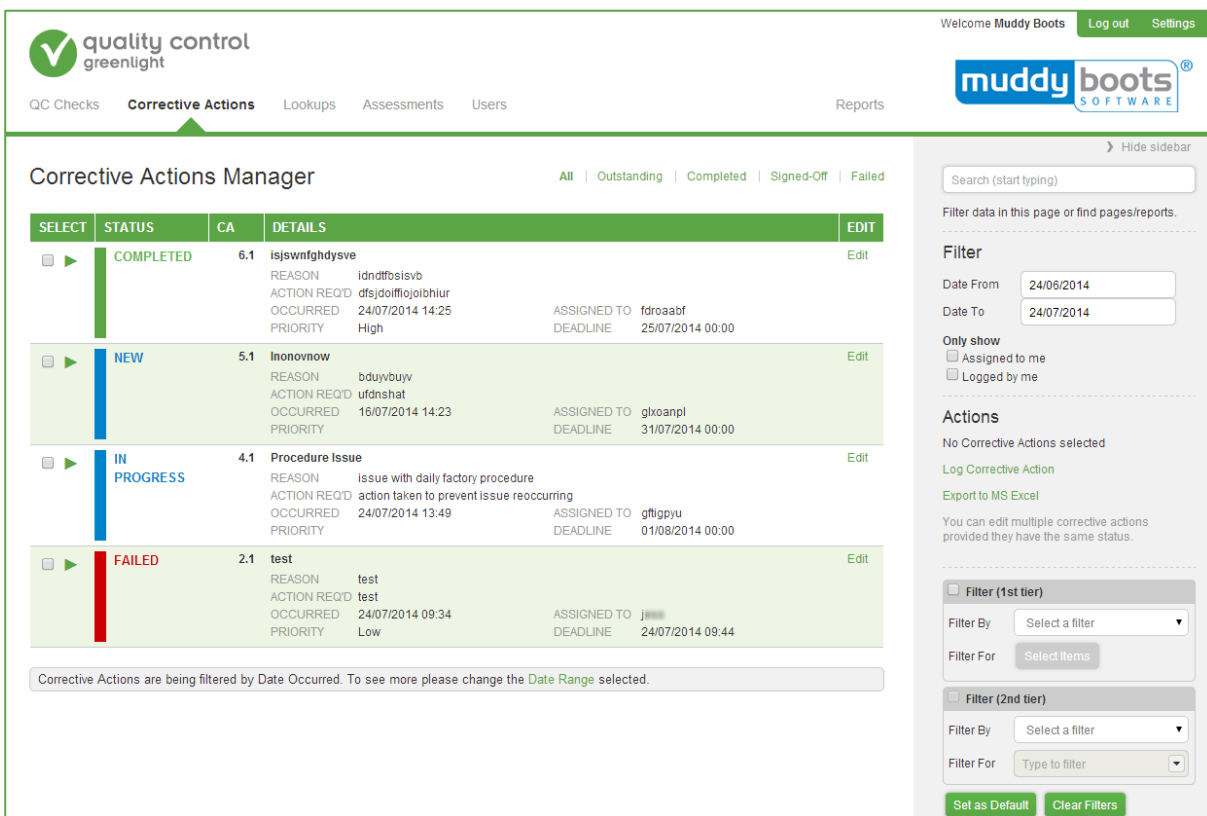
## VIEW CORRECTIVE ACTIONS

The corrective actions display as a list, with one item per row. The status of each corrective action is indicated by a colour and 'Status'.

- 1) To view corrective actions by status, use the **Outstanding, Completed, Signed-Off** and **Failed** quick filters above at the top of the screen.
- 2) Further narrow your search using the date range filters.

**Please note:** Overdue issues have a date range and therefore, any corrective action that has been overdue for more than one month will not be included in the view by default. It is possible to see older overdue issues by extending the date range using the date filter.

- 3) You can use the search feature to find the item you are looking for.



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Welcome Muddy Boots Log out Settings

QC Checks **Corrective Actions** Lookups Assessments Users Reports

muddy boots SOFTWARE

### Corrective Actions Manager

All | Outstanding | Completed | Signed-Off | Failed

SELECT	STATUS	CA	DETAILS	EDIT
<input type="checkbox"/>	COMPLETED	6.1	isjswfghdysve REASON idndfbsisvb ACTION REQ'D dfsjdofffojoihbliur OCCURRED 24/07/2014 14:25 PRIORITY High ASSIGNED TO fdroaafb DEADLINE 25/07/2014 00:00	Edit
<input type="checkbox"/>	NEW	5.1	Inonovnow REASON bduyvbuv ACTION REQ'D ufdnshat OCCURRED 16/07/2014 14:23 PRIORITY ASSIGNED TO glxoanpl DEADLINE 31/07/2014 00:00	Edit
<input type="checkbox"/>	IN PROGRESS	4.1	Procedure Issue REASON issue with daily factory procedure ACTION REQ'D action taken to prevent issue reoccurring OCCURRED 24/07/2014 13:49 PRIORITY ASSIGNED TO gtlgpyu DEADLINE 01/08/2014 00:00	Edit
<input type="checkbox"/>	FAILED	2.1	test REASON test ACTION REQ'D test OCCURRED 24/07/2014 09:34 PRIORITY Low ASSIGNED TO j... DEADLINE 24/07/2014 09:44	Edit

Corrective Actions are being filtered by Date Occurred. To see more please change the Date Range selected.

Search (start typing)

Filter data in this page or find pages/reports.

**Filter**

Date From 24/06/2014  
Date To 24/07/2014

**Only show**

Assigned to me  
 Logged by me

**Actions**

No Corrective Actions selected

Log Corrective Action  
Export to MS Excel

You can edit multiple corrective actions provided they have the same status.

Filter (1st tier)

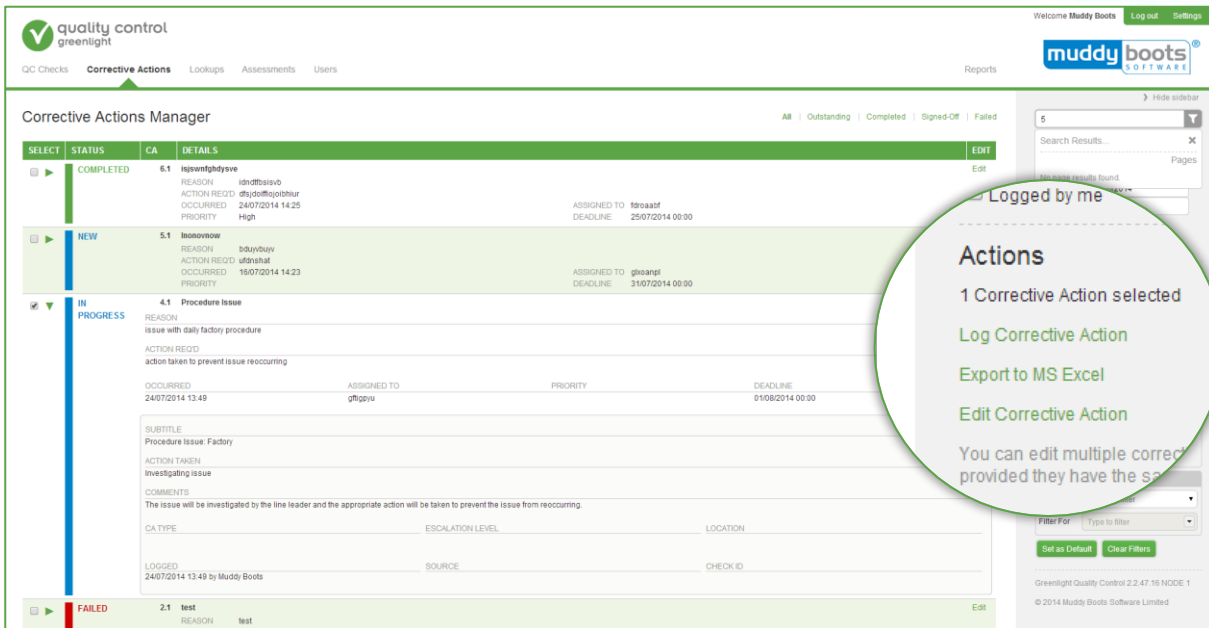
Filter By Select a filter  
Filter For Select Items

Filter (2nd tier)

Filter By Select a filter  
Filter For Type to filter

Set as Default Clear Filters

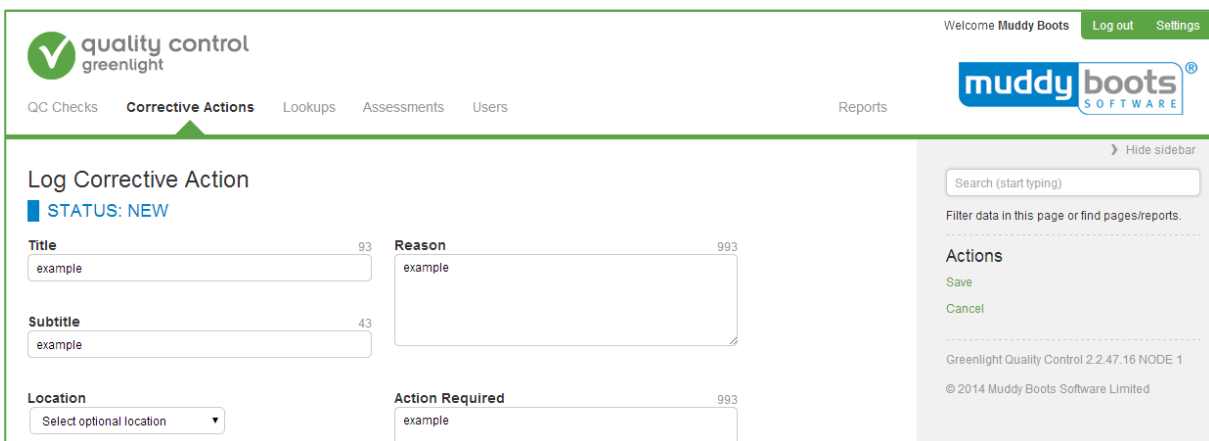
- 4) To edit the corrective action, select **Edit** to the right of the row, or alternatively use the options in the **Actions** column on the right.
- 5) For a quick view of the details behind each corrective action, click the small green arrow to expand their selection. The **Source** field displays if the corrective action was raised from a check, question or ad-hoc.
- 6) The export functionality is still available using the quick links within the actions menu on the right. You can export your corrective action list in Excel.
- 7) It is also possible to log a new corrective action from the **Actions** menu.



## LOGGING CORRECTIVE ACTIONS

Corrective actions can be assigned to a group (notification group) or an individual user.

- 1) The status of the corrective action is indicated by a colour and text at the top of the form. This will be New (blue) or In Progress (orange).
- 2) You can **Save** or **Cancel** the entry at any time using the links from the actions menu on the right.



- 3) Complete the fields to detail your corrective action.
- 4) Assign a **Priority level**; a **Deadline** and **Reminder date** will be generated. It is possible to override the dates generated by the system.
- 5) Upload documents or images to attach to the corrective action.
- 6) Manually change the status of your corrective action.
- 7) **Save** or **Cancel** using the buttons at the bottom of the screen.

## EDITING CORRECTIVE ACTIONS

It is possible to edit new or outstanding corrective actions using **Edit** on the right of the row or select **Edit** from the actions menu, as described in the **View Corrective Actions** section. Users can edit the details of a single corrective action, or edit the status of multiple corrective actions.

### Edit single Corrective Action

- 1) From **Corrective Actions Manager**, click the box next to the corrective action to select it.
- 2) Select **Edit Corrective Action** from the actions menu on the right of the screen.

SELECT	STATUS	CA	DETAILS	EDIT
<input checked="" type="checkbox"/>	NEW	8.1	test test REASON: test ACTION REQ'D: test OCCURRED: 25/07/2014 12:17 PRIORITY: Low ASSIGNED TO: gffppiv DEADLINE: 31/08/2014 12:17	Edit
<input checked="" type="checkbox"/>	FAILED	7.1	example REASON: example ACTION REQ'D: example OCCURRED: 24/07/2014 14:29 PRIORITY: Medium ASSIGNED TO: gffppiv DEADLINE: 26/07/2014 14:29	Edit
<input checked="" type="checkbox"/>	COMPLETED	6.1	isjswfghdyse REASON: idrftbaisb ACTION REQ'D: dfgjoffghjhour OCCURRED: 24/07/2014 14:25 PRIORITY: High ASSIGNED TO: ftrqaadt DEADLINE: 25/07/2014 00:00	Edit
<input checked="" type="checkbox"/>	NEW	5.1	lnoovnow REASON: bdyvbbv ACTION REQ'D: ulnshah OCCURRED: 16/07/2014 14:23 PRIORITY: High ASSIGNED TO: ghrcanpl DEADLINE: 31/07/2014 00:00	Edit
<input checked="" type="checkbox"/>	IN PROGRESS	4.1	Procedure issue REASON: Issue with daily factory procedure ACTION REQ'D: action taken to prevent issue reoccurring	Edit

- 3) In the **Edit Corrective Action** screen, the **Corrective Action ID** and status is displayed beneath the **Edit Corrective Action** screen title. This will be 'New' (blue), 'In Progress' (orange), 'Completed' (green) or 'Failed' (red).
- 4) After editing, click **Save**.
- 5) You can view an audit trail of each corrective action, detailing when a selected item was last updated, who by, from which device and what action was taken.

### Edit Corrective Action

#7 (example)  
■ STATUS: NEW

**Title**

**Reason**

**Subtitle**

**Location**

**Escalation**

**Assign To**  
 User  Group  Supplier

**User**

**Occurred**

**Priority**

Search (start typing)  
 Filter data in this page or find pages/reports.

**Actions**  
 Save  
 Cancel  
 Review  
 Audit Trail

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### Edit Corrective Action

#6 (isjswnfghdysve)  
■ STATUS: COMPLETED

**Title**

**Reason**

**Subtitle**

**Location**

**Escalation**

**Assign To**  
 User  Group  Supplier

**User**

**Occurred**

**Priority**

Search (start typing)  
 Filter data in this page or find pages/reports.

**Actions**  
 Save  
 Cancel  
 Review  
 Audit Trail

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Audit Trail

UPDATED	USER NAME	MACHINE	ACTION TYPE
24/07/2014 14:25:47	Muddy Boots	192.168.0.168	Updated

### Edit Multiple Corrective Actions\*

- 1) From **Corrective Actions Manager**, tick the boxes next to the corrective actions you want to update the status of.
- 2) Select **Edit Multiple Corrective Actions** from the actions menu on the right of the screen.

#### Corrective Actions Manager

SELECT	STATUS	CA	DETAILS
<input checked="" type="checkbox"/>	NEW	8.1	test REASON: test ACTION REQD: test OCCURRED: 25/07/2014 12:17 PRIORITY: Low ASSIGNED TO: gflgpyu DEADLINE: 01/08/2014 12:17
<input checked="" type="checkbox"/>	FAILED	7.1	example REASON: example ACTION REQD: example OCCURRED: 24/07/2014 14:29 PRIORITY: Medium ASSIGNED TO: gflgpyu DEADLINE: 26/07/2014 14:29
<input checked="" type="checkbox"/>	COMPLETED	6.1	isjswnfghdysve REASON: idnddbsivb ACTION REQD: dtyjdtffjgplshur OCCURRED: 24/07/2014 14:25 PRIORITY: High ASSIGNED TO: mrossaf DEADLINE: 25/07/2014 00:00
<input checked="" type="checkbox"/>	NEW	5.1	mononow REASON: bduybuy ACTION REQD: dteabot

Corrective Actions selected

Log Corrective Action

Export to MS Excel

**Edit Multiple Corrective Actions**

You can edit multiple corrective actions provided they have the same status.

- 3) A pop-up will appear allowing you to amend the status of the selected items to New, In Progress or Completed.
- 4) Click **Save**.

#### Corrective Actions Manager

SELECT	STATUS	CA	DETAILS	EDIT
<input checked="" type="checkbox"/>	NEW	8.1	test test REASON: test ACTION REQD: test OCCURRED: 25/07/2014 12:17 PRIORITY: Low ASSIGNED TO: gflgpyu DEADLINE: 01/08/2014 12:17	Edit
<input checked="" type="checkbox"/>	FAILED	7.1	example REASON: example ACTION REQD: example OCCURRED: 24/07/2014 14:29 PRIORITY: Medium ASSIGNED TO: gflgpyu DEADLINE: 26/07/2014 14:29	Edit
<input checked="" type="checkbox"/>	COMPLETED	6.1	isjswnfghdysve REASON: idnddbsivb ACTION REQD: dtyjdtffjgplshur OCCURRED: 24/07/2014 14:25 PRIORITY: High ASSIGNED TO: mrossaf DEADLINE: 25/07/2014 00:00	Edit
<input checked="" type="checkbox"/>	NEW	5.1	mononow REASON: bduybuy	Edit

Update Multiple Corrective Actions

Status:

Search (start typing)

Filter data in this page or find pages/reports.

**Filter**

Date From: 28/06/2014  
 Date To: 28/07/2014

**Only show**  
 Assigned to me  
 Logged by me

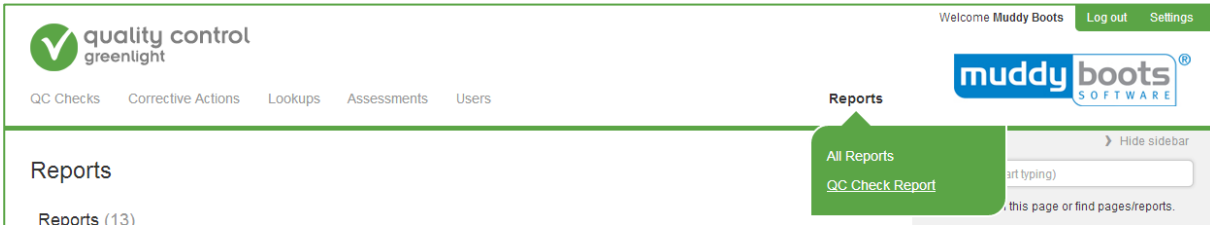
**Actions**  
 2 Corrective Actions selected  
 Log Corrective Action  
 Export to MS Excel  
**Edit Multiple Corrective Actions**  
 You can edit multiple corrective actions provided they have the same status.

## REPORTS

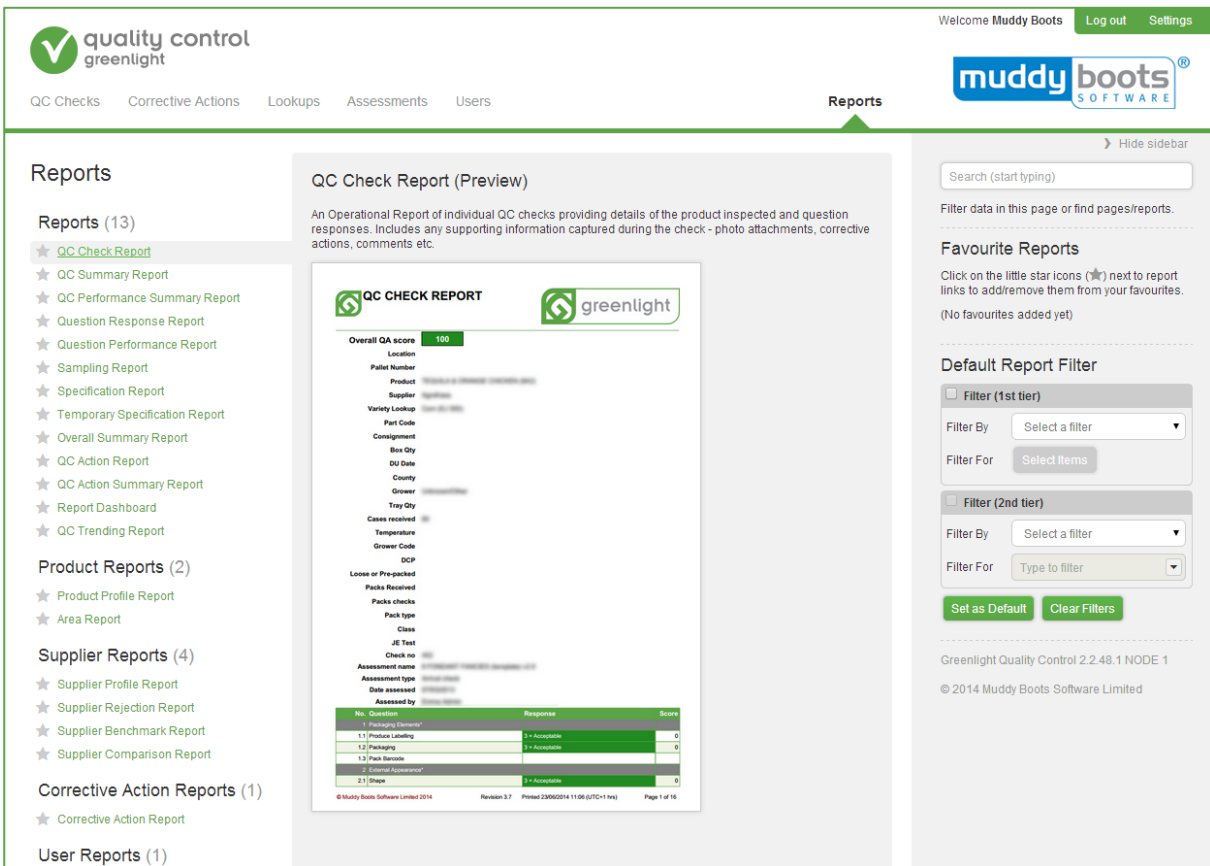
Many reports are available on Greenlight QC under the **Reports** option of the menu (select **All Reports**).

### REPORTS SUITE

Navigate to the **Reports** tab to access the full suite of reports available.

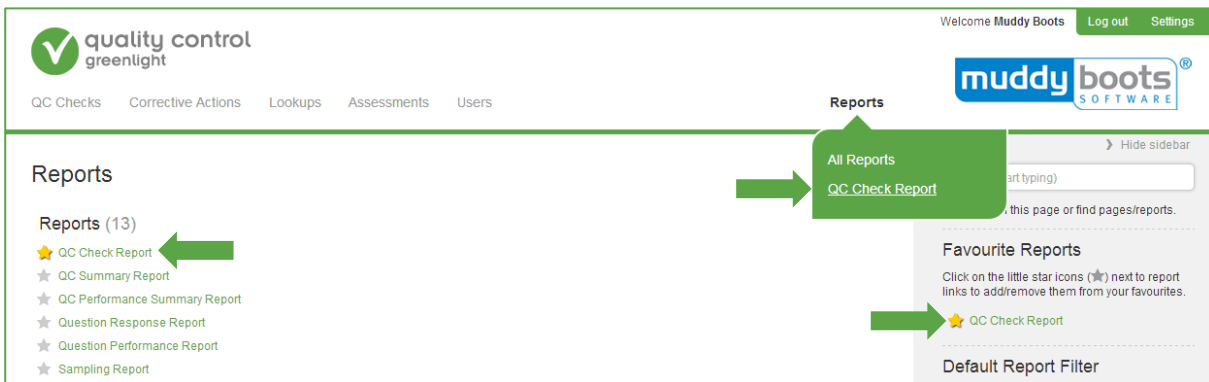


You can hover over each report to see a preview.



## FAVOURITES

You can click the star on the left of the report name to mark it as a favourite. It will be added to the report menu so that when you hover over **Reports** you can easily access your favourites.



## VIEWING REPORTS

When you click on a report, you can use filtering criteria to help find the data you want to display in the report. When you have selected the required options, click View Report to generate the report.

- Choosing assessment types

Many reports allow you to choose what assessment types you want to see data for. If the assessment type you want to select does not show in the list of assessment types, this signifies that no checks have been completed for that assessment type.

- Grouping data

Many reports allow you to choose how to group data in the report. Data can be grouped (e.g. supplier, location) to help you drill down into your data.

- Filtering data

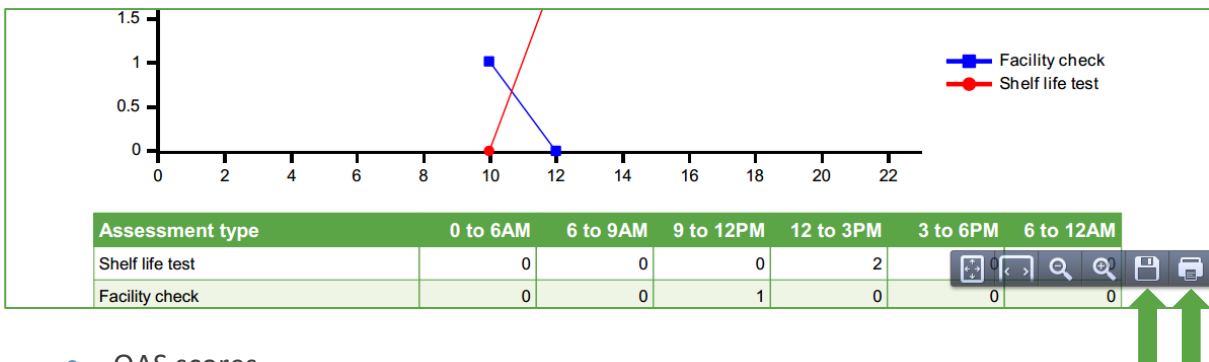
Many reports contain filters to enable you to select what data you see in the report (e.g. filter by supplier); this helps you drill down into your data. You can filter on two levels (e.g. supplier and stock code) on various report types.

- Exporting data

Report data can be exported by clicking an **Export** button at the bottom of the screen or using the **Export Data** screen.

- Printing and saving reports

Each report will open in a new tab or a new window on your computer. You can save a copy of the report or print it by using the icons at the top of the screen:



- QAS scores

If a QAS score has been overridden and updated after the check has been completed, the updated score is shown in the reports rather than the original QAS score.

- Data permissions

Your user account's settings for data permissions will filter the information you see in the report filters and reports. Click on your **User Account Profile** (under **Users**) to check what permissions you have.

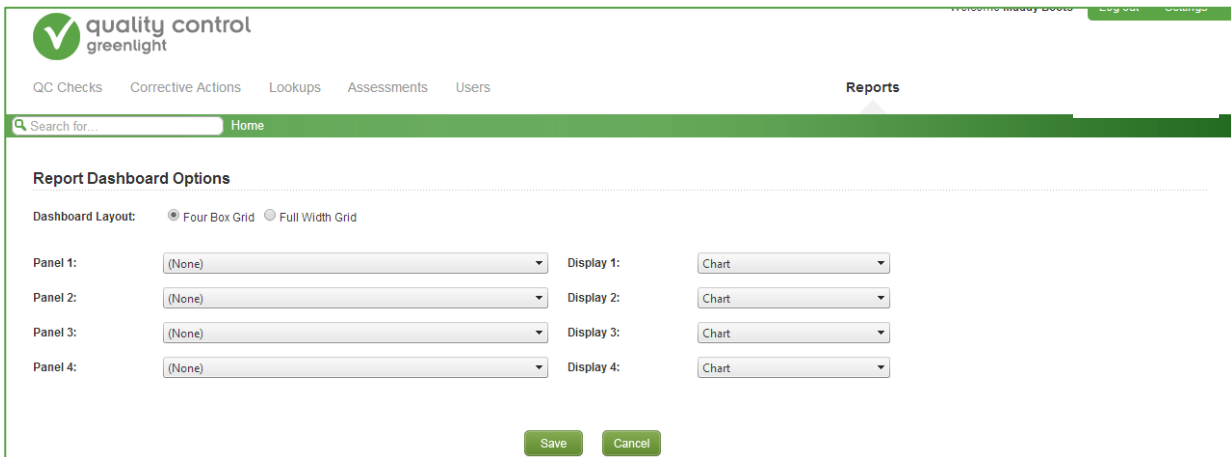
- Date, time and time zone details

On all reports, the date and time (and time zone) indicating when the report was generated is shown.

## REPORT DASHBOARD

The first screen you view when you log in for the first time is the dashboard screen. This displays up to four charts or graphs chosen by the user. To change what data you view:

- 1) Choose whether you want the panels to be shown in a **Four Box Grid** or a **Full Width Grid**.
- 2) Choose what data is shown in each panel.
- 3) Click **Save**.



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QC Checks Corrective Actions Lookups Assessments Users **Reports**

Search for... Home

### Report Dashboard Options

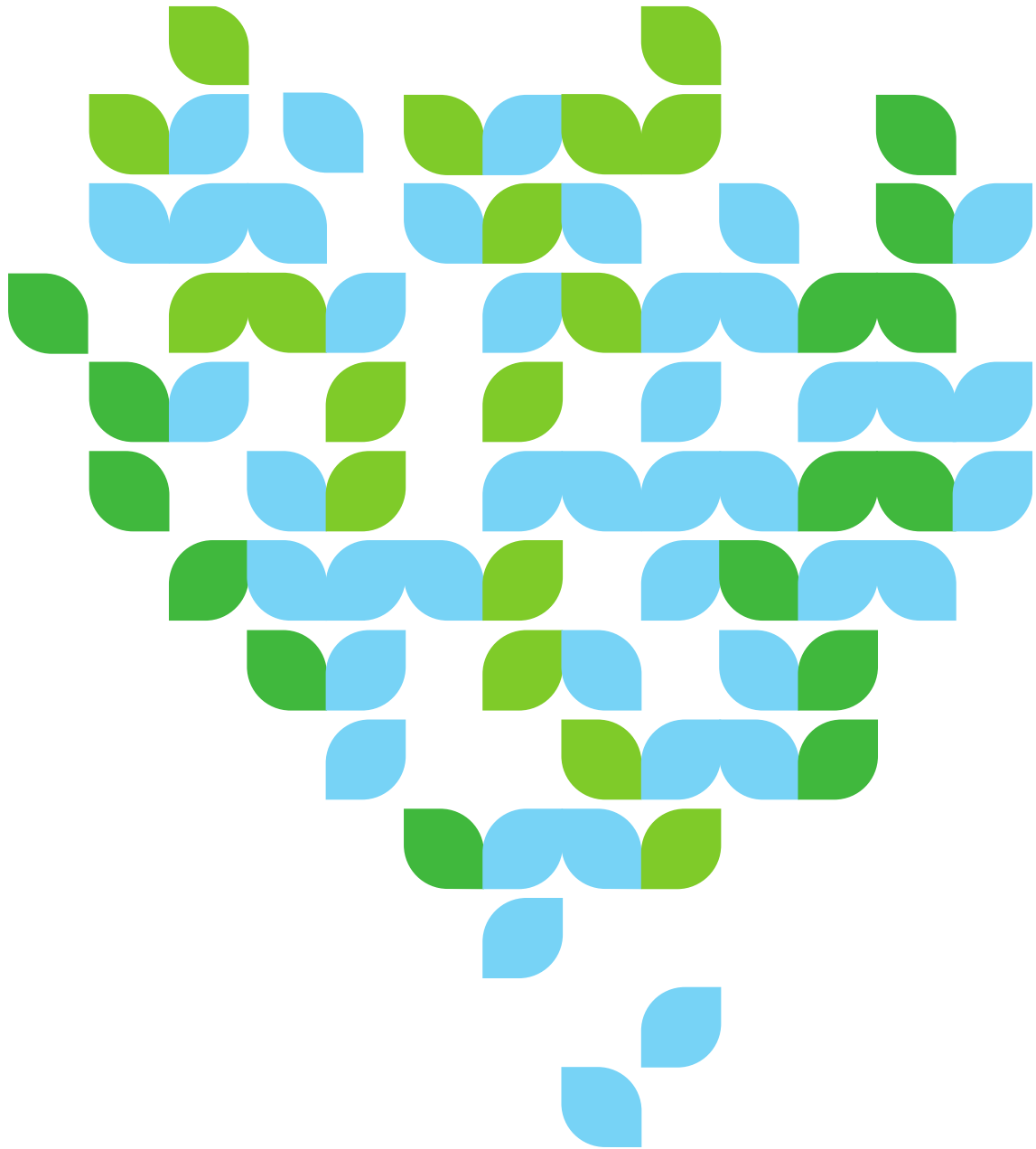
Dashboard Layout:  Four Box Grid  Full Width Grid

Panel 1:	<input type="text" value="(None)"/>	Display 1:	<input type="text" value="Chart"/>
Panel 2:	<input type="text" value="(None)"/>	Display 2:	<input type="text" value="Chart"/>
Panel 3:	<input type="text" value="(None)"/>	Display 3:	<input type="text" value="Chart"/>
Panel 4:	<input type="text" value="(None)"/>	Display 4:	<input type="text" value="Chart"/>



APPENDIX 1: GLOSSARY

Term	Meaning
Active Alerts	Notifications
Assessment	The template used to form a QC Check
Custom Lookup	A user-defined “lookup” or data list, created in the Custom Lookup Administration, to be used as a response data type in assessments
GLQC	Greenlight QC
Guidance	User defined guidance that can be linked to an assessment or a question to assist the person performing a QC Check
Header	The screen/data which is used to create the static list of data required to identify what is being assessed for each type of assessment
Header Questions	Data used to identify what is being assessed for each type of assessment
Lookup	A list of data, either user defined or system defined, which can be used as a response data type in assessments
QC	Quality Control
QC Check	Where QC data is captured by product or facility
QC Mobile	Greenlight QC Mobile application – the software used on mobile devices for capturing QC check results
Mobile	Greenlight QC Mobile application – the software used on mobile devices for capturing QC check results
QC Office	Greenlight QC Office application – the software used for user administration, QC check administration and reporting.
Office	Greenlight QC Office application – the software used for user administration, QC check administration and reporting.
Region	E.g. a county, state or province
Specification	An attachment which can be linked to GLQC and exposed on QC Mobile to show detail/guidance relating to the item being assessed
Stock Code	A product
System Lookup	A system-defined “lookup”, or data list, which allows data to be selected from a lookup of other data in the system (e.g. stock codes, suppliers or consignments).



## Contact Us

We aim to meet all your expectations regarding User Support for your chosen Software Solutions from Muddy Boots. If you require further technical assistance with Greenlight Quality Control, please contact our Support team via [support@muddyboots.com](mailto:support@muddyboots.com). For information on training sessions, webinars and user materials, please contact Product Adoption via [productadoption@muddyboots.com](mailto:productadoption@muddyboots.com).

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