muddy boots ®
SOFTWARE

GREENLIGHT QC MOBILE
USER GUIDE

quality control
greenlight

CONTENTS

DOCUMENT CONTROL

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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.

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

GREENLIGHT 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.

LOGGING IN

Begin by turning on your device and double-clicking on the Greenlight QC Mobile icon to open the application:

Login to the application using your own personal Username and Password issued by your administrator. Enter your Username and Password and click Login. Press Cancel to quit the application.

USABILITY TIPS

The following tips can be used to enable swift use of this application:

- If the response to a question is a selection from a list of options, typing in the first few letters will bring up relevant responses.
- Where there is a drop down of multiple response options, you can click on the downward arrow icon to see the list or click the magnifying glass to view/search the list in a pop out window.
- Use Tab key to move forward through response boxes.
- Use Double click in a response box to open a list of responses.
- For questions where the response must be a date, double click to enter today's date.
- For questions where the response must be a long text entry, double click to open a larger response box.
- Use *F* keys to move between screens or 'tabs' within an assessment.
- Assessments can be set up with a 'tree' view to navigate quickly to sections and specific questions (this is a configuration option when the assessment is set up in Greenlight QC Office Web).
- Short text questions have a number pad button so that you can either type a word into the box or use the number pad to quickly enter a number:
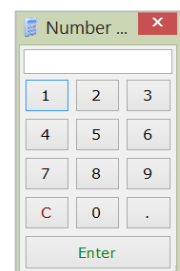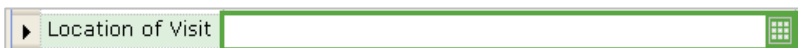
- The *Alt* key can be used to shortcut to various actions. Hold down the Alt key on your keyboard and you will see certain letters underlined in various words on the screen. Press the letter of the action that you want to select. For example, to save a check press *Alt* and *S*:
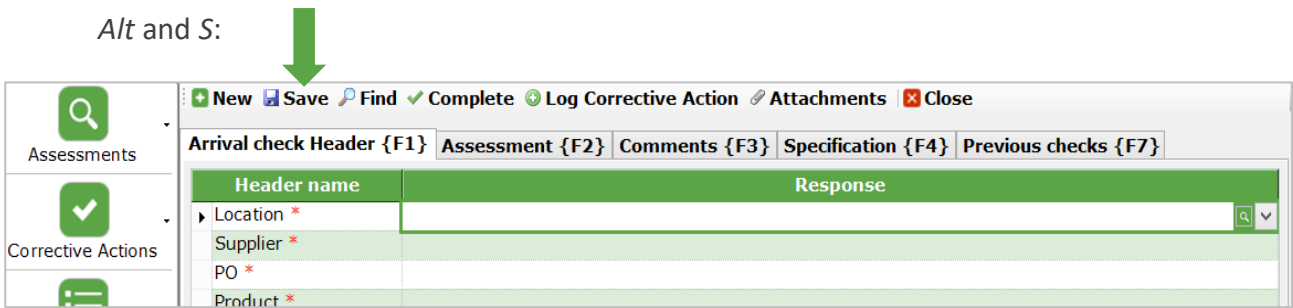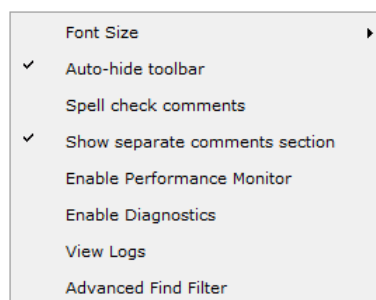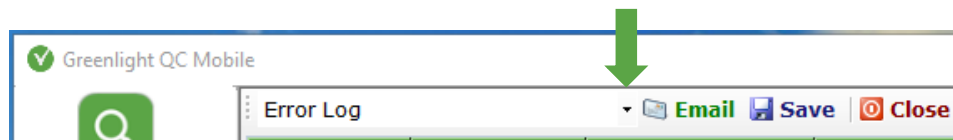

OPTIONS

There are several features within Greenlight QC Mobile that you can change to customise how you use the system. All options are available by clicking the cog icon at the bottom of the screen:
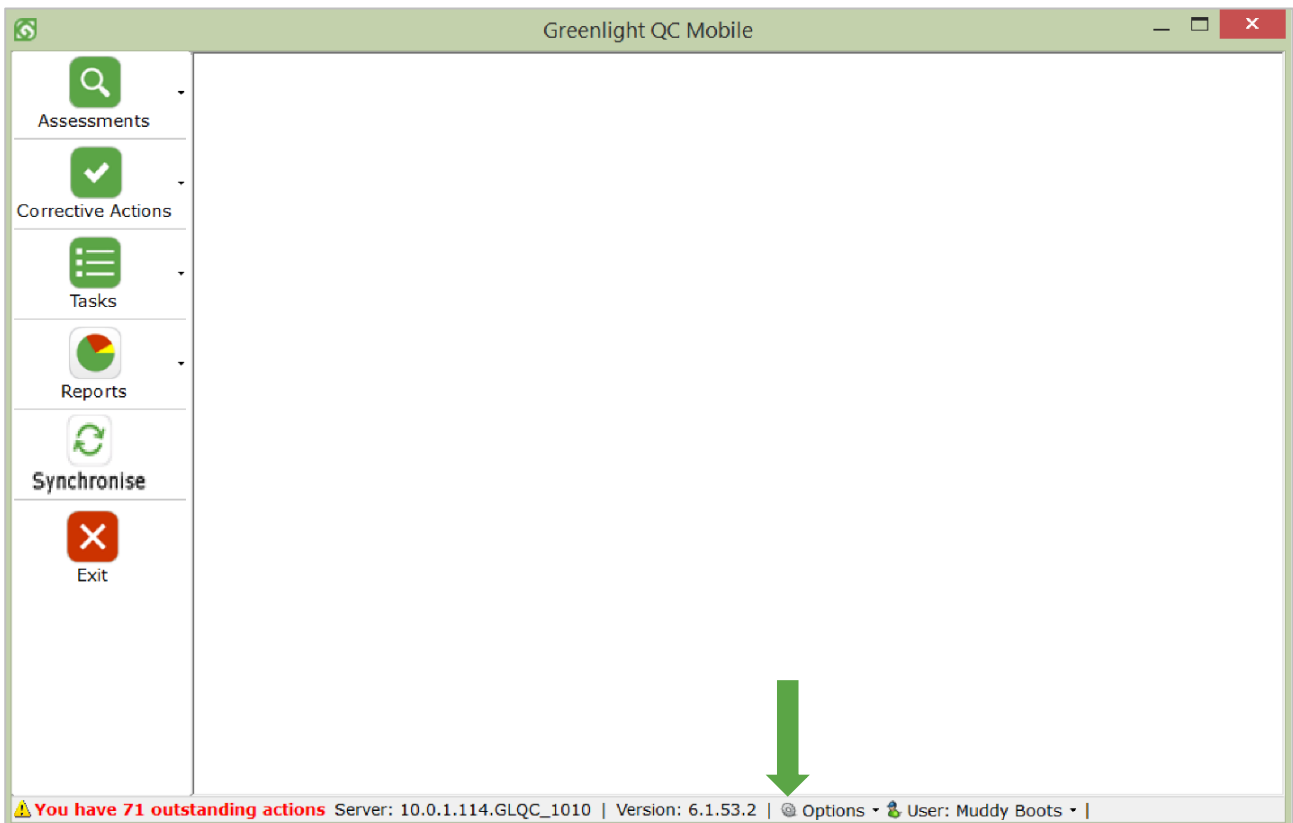
You will then have the following options to choose from:

- **Font size**

    Select a size from **small**, **medium**, **large**, **X-large** or **XX-large**.

- **Auto-hide toolbar**

    The toolbar (options list on the left of the page) can be displayed or hidden.

    To change this setting, click on **Options** at the bottom of the screen. From the menu that opens click on **Auto-hide toolbar** to deselect this option.

- **Spell check comments**

    The default setting is to display spell check comments. To turn this option off, click on **Options** at the bottom of the screen (as shown above). From the menu that opens click on **Spell check comments** to deselect this option.

- **Show separate comments**

    Assessments can be configured to have an extra tab where overall comments can be added. To enable this screen, select **Show separate comments section** from the Options menu. It is also possible to complete the assessment from this tab. If your assessments include Footer Questions it is important to ensure that this comments tab is shown, as that is where the Footer Questions will be viewed. **We recommend this is activated to ensure the screens show the same information as this user guide.**

- **Enable Performance Monitor**

    This should only be enabled at the request of the Muddy Boots Support team.

- **Enable Diagnostics**

    This option is no longer used.

- **View Logs**

    Acts as a shortcut to the user's error and sync logs. Toggle between these by using the button at the top left.

- **Advanced Find Filter**

    Adds extra filter options to each column within the Find screen.

SYNCHRONISING THE DEVICE

Synchronising copies any updates from Greenlight QC Office to your Mobile device and copies any completed QC checks back into Greenlight QC Office. Your Mobile device can be set up to synchronise automatically throughout your shift or you can synchronise manually by clicking the **Synchronise** button.
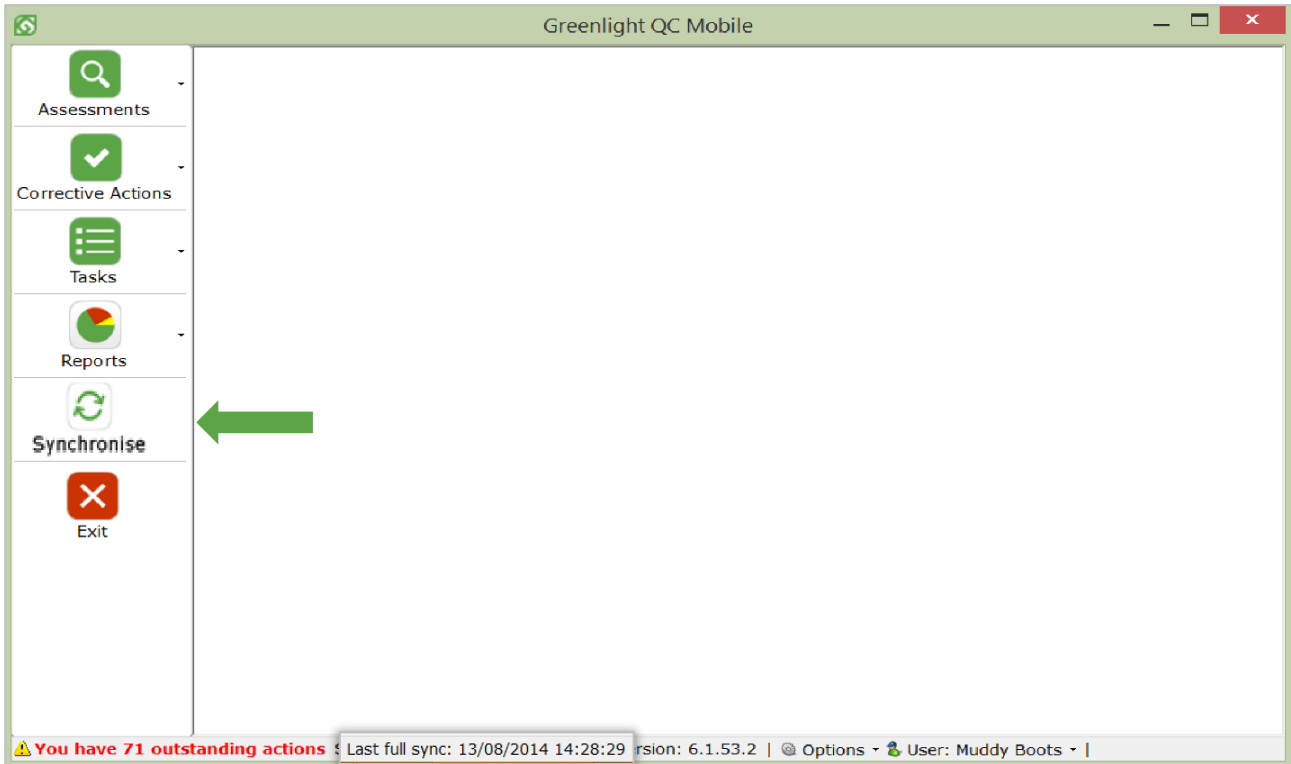
Please note:

- You need to be connected to the internet to synchronise your Mobile device.
- You can view the date and time of the last sync at the bottom of the Mobile screen. If this date and time is red, this means the device has not been synchronised in the last 24 hours.
- If you have automatic synchronising set up you can still run a manual sync at any time by clicking the synchronise button displayed above.

SYNCHRONISING AUTOMATICALLY

Auto-syncing will run when the device has network connection meaning that users can continue to work whilst the sync happens in the background. Mobile users can also run a manual sync at any time if required using the **Greenlight Sync Config Tool.**

To open the **Greenlight Sync Config** manager, follow the step below to find the tool:
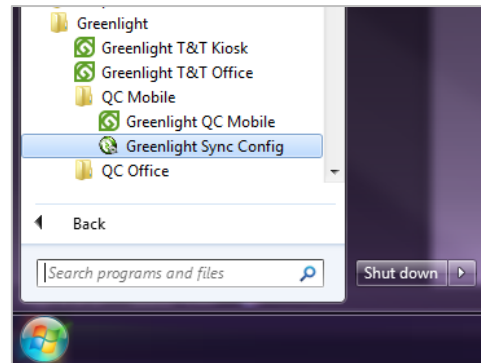
Windows 7

Click Start

▼

Select All programs

▼

Select Muddy Boots Software

▼

Select Greenlight QC Mobile

▼

Select Greenlight Sync Config
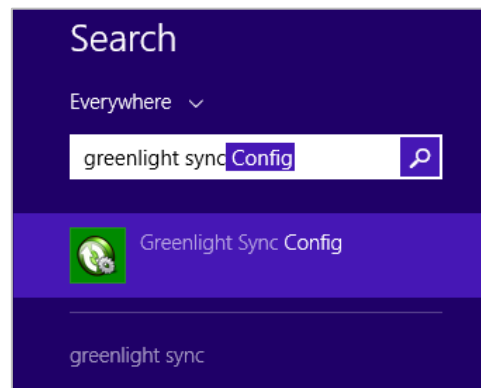
Windows 8.1 and Windows 10

Click Start

▼

Begin typing 'Greenlight Sync Config'

▼

As you type, a list of option will appear

▼

Select Greenlight Sync Config

The tool will open, follow the steps below:

TURN ON THE AUTO-SYNC SERVICE USING THE GREENLIGHT SYNC CONFIG TOOL

1. In the **Service Settings** tab, check that the **Service URL** is correct.
2. Add time periods as follows:
   a. **Run light sync every** = This is how often you want the Mobile device to synchronise if the device is turned on but the user is not logged into Mobile.
   b. **Run full sync every** = This is how often you want the Mobile device to synchronise when the user is logged into Mobile.
3. Tick the **Use sync compression** check box.
4. In the **Status** tab, click the **Start** button to start the auto sync service:
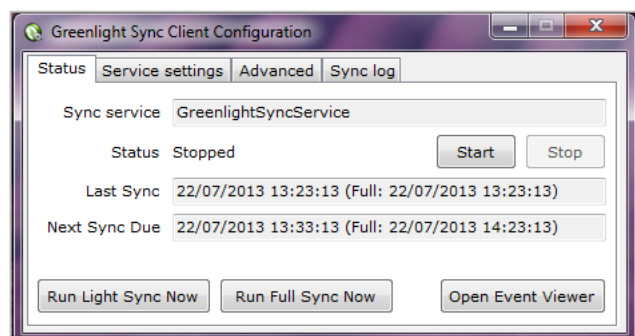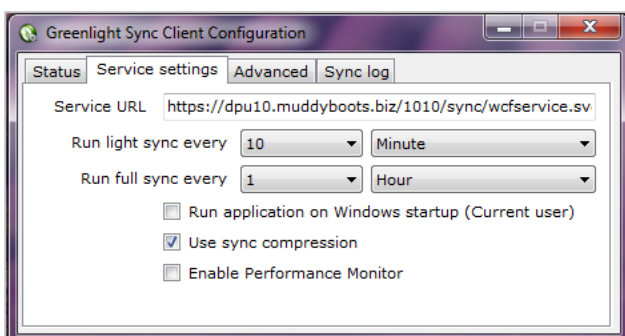
Please note:

- The Status tab also shows when the last sync was run and at what time the next sync will be run.
- If there is no internet connectivity when an automatic sync is due, Greenlight QC will keep retrying every 30 seconds until the sync is completed.
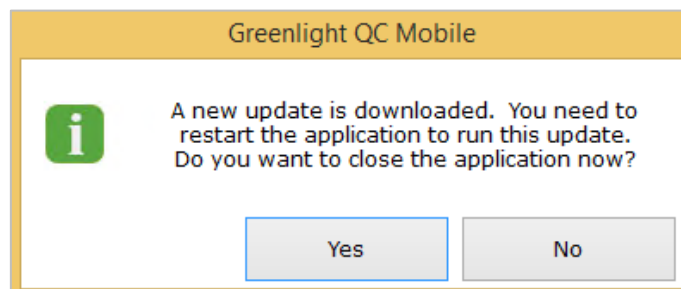
HOW TO RUN AN UPDATE

Log in and synchronise your devices, as normal.

When an update is available, you will see a pop-up box appear at the end of the sync, which will automatically download the new update file.
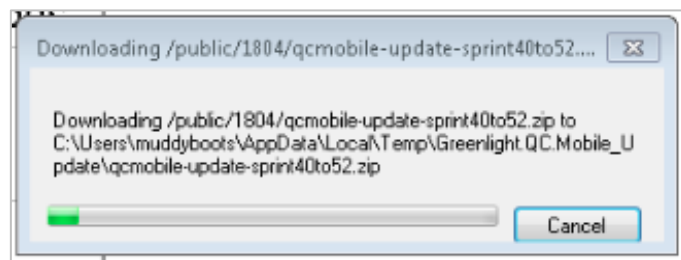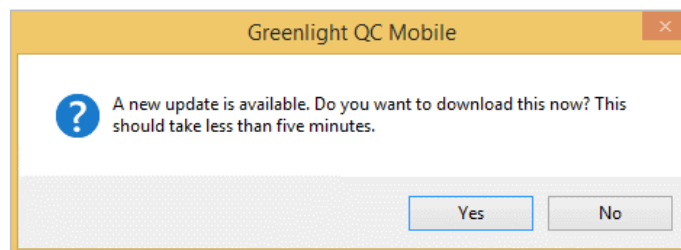

When the update has downloaded, you will see a new notification box as shown below - Click **Yes**.

The mobile application will be closed, and you will return to your desktop. Open the application again and you will see a prompt asking if the update can be installed – Click **Yes**.
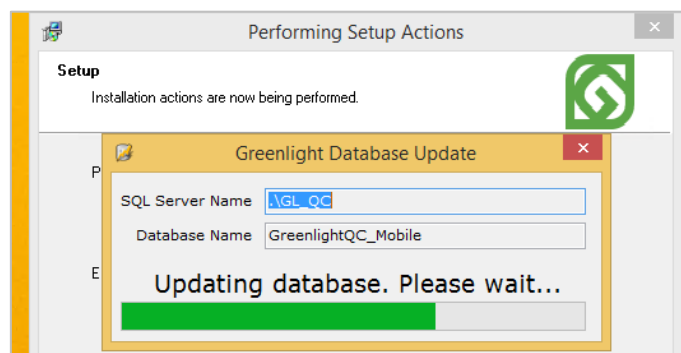
Please note: Install times may be slower depending on the strength of the network connection.

You may see a Windows confirmation message – If you do, click **Yes**.
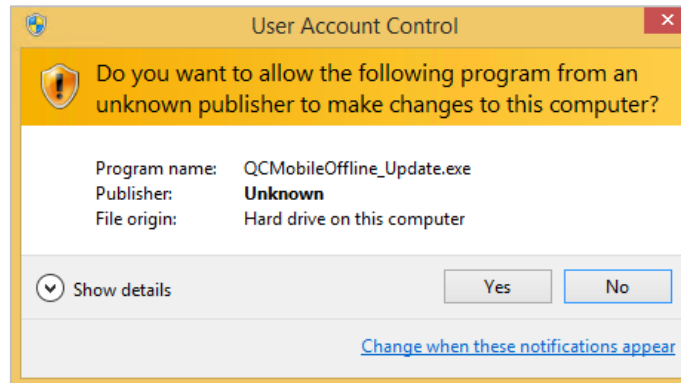
The update will install. When the update has finished installing, the QC Mobile application login screen will appear and you can login as normal.
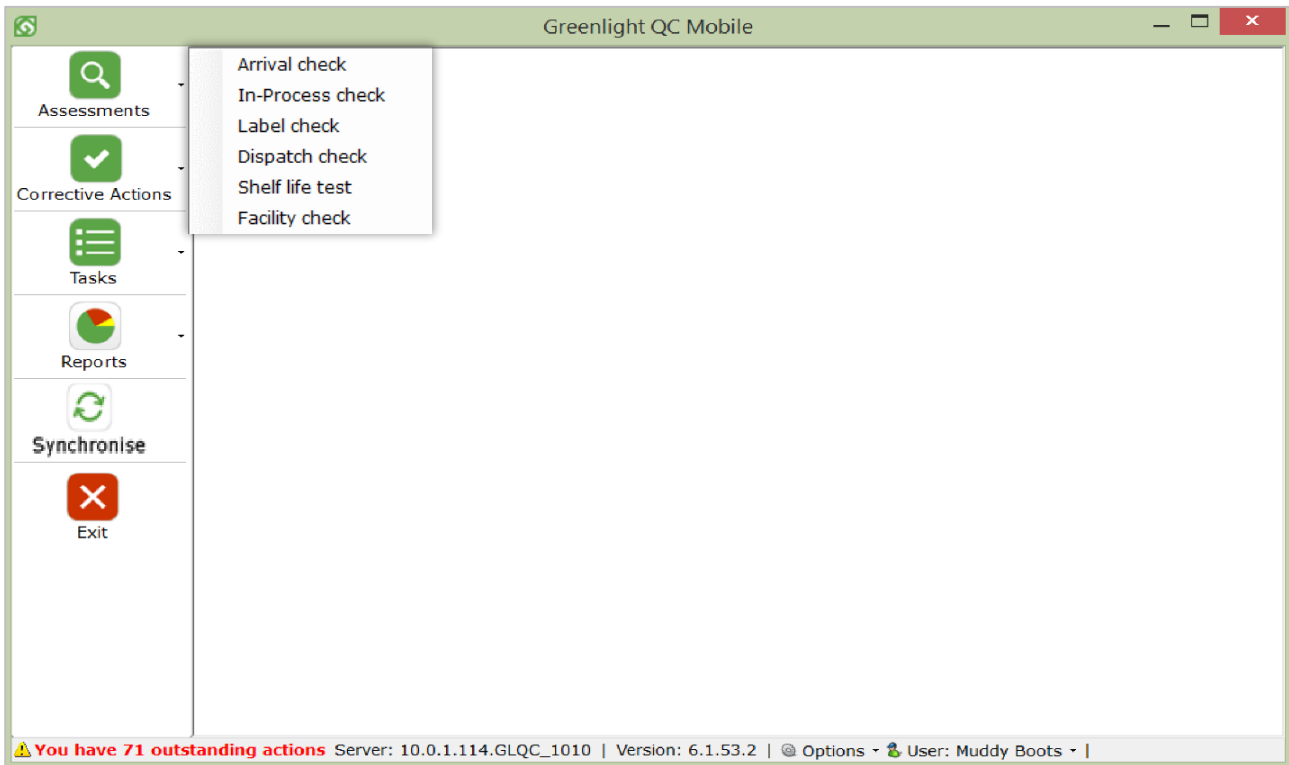
ASSESSMENTS

These instructions apply to all Assessment Types, except for Facility and Shelf Life checks. Please see the relevant section in this guide for how to complete Facility or Shelf Life checks.

PERFORMING A CHECK

1. To begin an Assessment, click on **Assessments** in the toolbar.
2. From the menu that opens, select the type of Assessment type that you want to use.
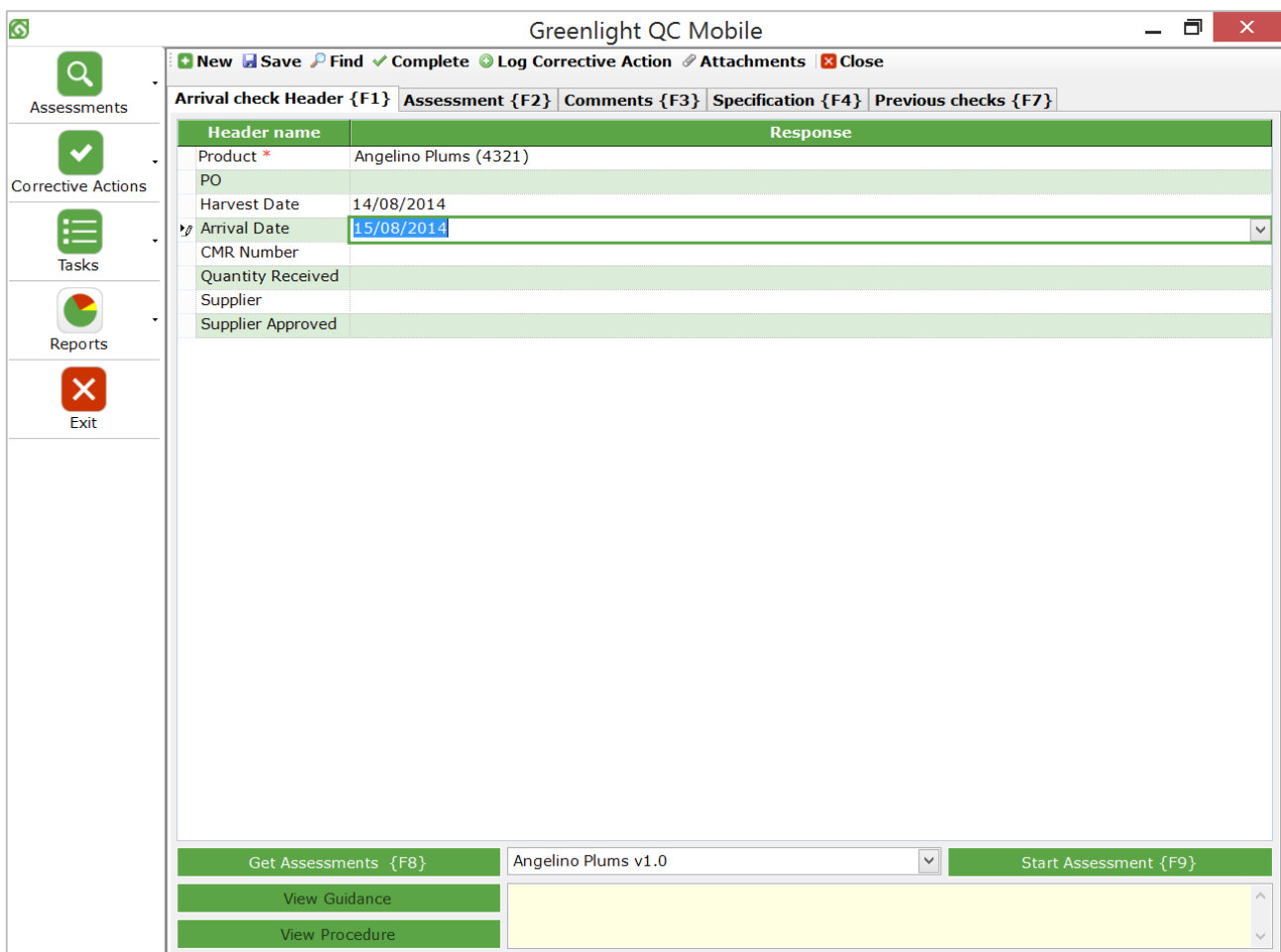
3. In the screen that opens, make sure that the tab titled **[Assessment Type] Header** is selected. Alternatively, a user can select this tab by pressing F1.

4. Answer the relevant questions by clicking in the response column and typing in your response or selecting a response from a drop down list (see keyboard shortcuts above).

   Please note:

   - Mandatory questions will be indicated by a red asterisk (*).
   - To enter a barcode using the barcode scanner, click in the response box for the question requiring a barcode, then scan the barcode.
   - You may be able to copy the arrival header question responses from the previous check by clicking the Copy button at the top of the screen. You may also be able to copy from any previous assessment by clicking on the Previous Assessments tab, clicking on the check whose header you want to copy and then clicking the Copy button at the top of the screen. Only selected questions may be copied. *You may not have this option, in which case you will not see the Copy button.*

5. Once Header information has been entered, click **Get Assessments** (or press F8).

6. Select the assessment you want from the drop down menu.

7. Before starting the assessment, **View Guidance** associated with that assessment. If there are guidance notes, these are shown in the yellow box at the bottom of the screen.

8. Click **Start Assessment** (or press F9) which will open the **Assessment** tab.
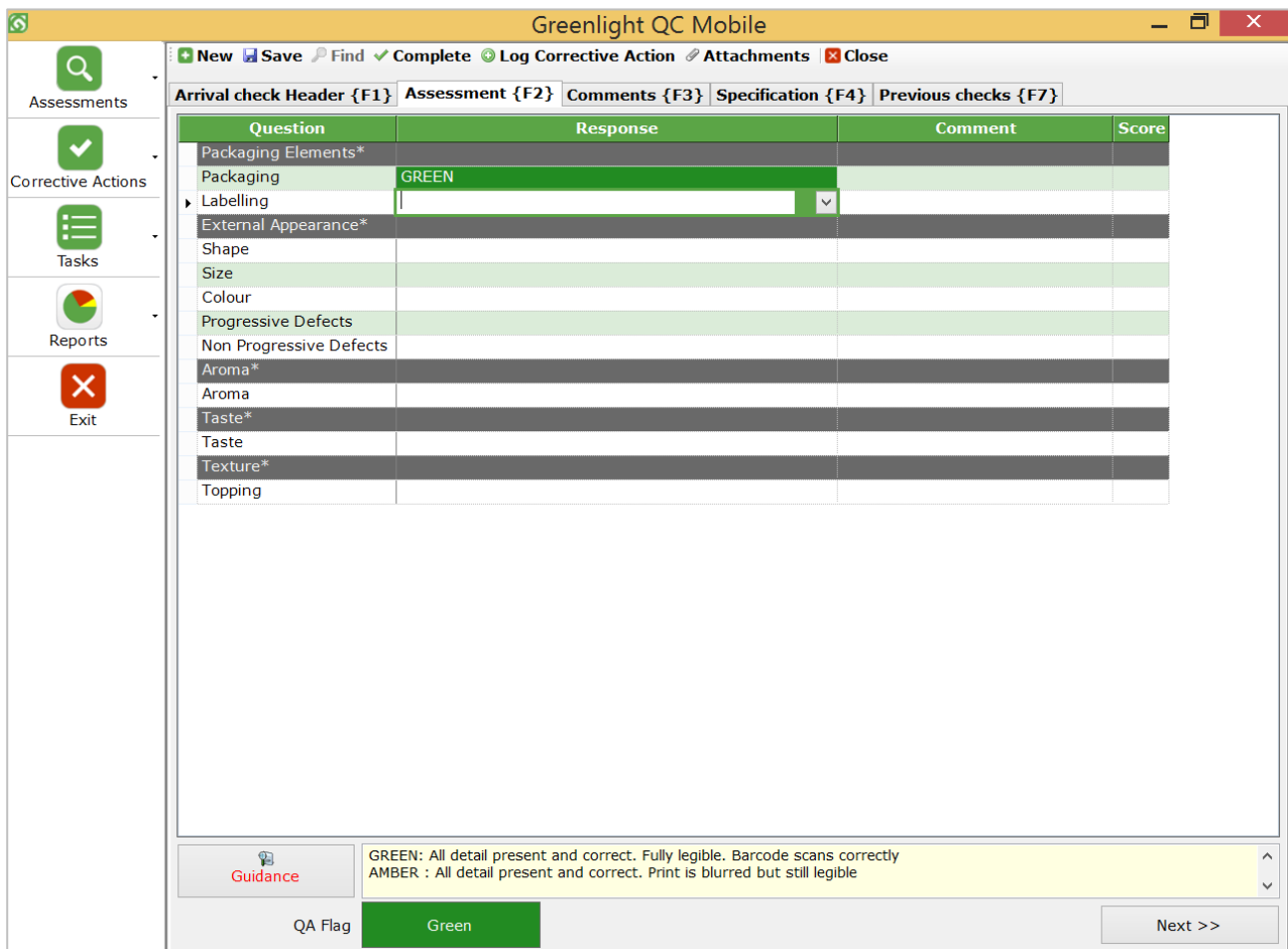
9. View the product specification by clicking on the **Specification** tab or by pressing F4. To navigate back to the Assessment screen, click on the **Assessment** tab or press F2.

10. View previous checks on the same product by clicking the **Previous Checks** tab.

11. For each question, you can view guidance in the box at the bottom of the screen. This will display in a pop-up box when the **Guidance** button is pressed.

12. Enter responses to questions in the **Response** column.

13. Add comments for any question in the **Comments** column.

14. When you have finished, click **Next** in the bottom right of the screen.

Please note:

- For questions requiring samples to be taken and sample data to be entered, click **S** in the response box, enter the information and an average will be calculated.
- Rows shown in dark grey indicate either a question group (i.e. a title that questions are grouped under) or a formula question. Neither require you to add a response.
- In order to see the 'Next' button you must have the 'Show Separate Comment Section' enabled via the Options. This is detailed within the 'Options' section of this user guide.

15. You will be in the **Comments** tab. There may be questions here that you need to answer.
16. Add a **Comment** if required.
17. You may be able to override the **QA Flag** by clicking on an alternative flag if required.
18. Click **Complete Check** to finish.
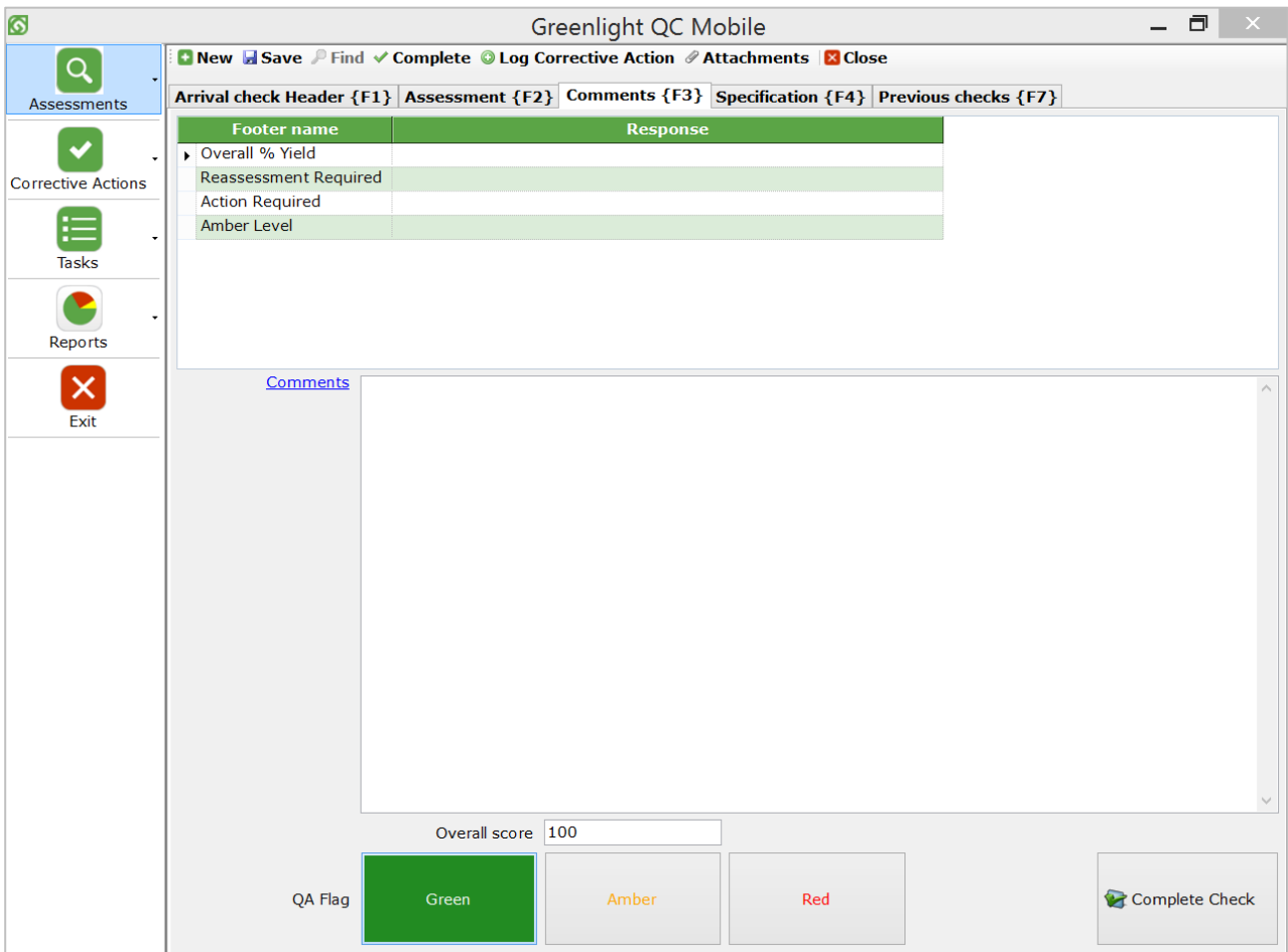
Please note:

- You may **not** have the ability to override the QA Flag.
- Depending on how your system is configured, you may see additional questions on the Comments tab. These are called 'Footer' Questions and can also be answered or edited after the assessment has been completed by using the QC Actions screen. See relevant section of this guide.

19. You will receive a message to confirm the check has been completed:
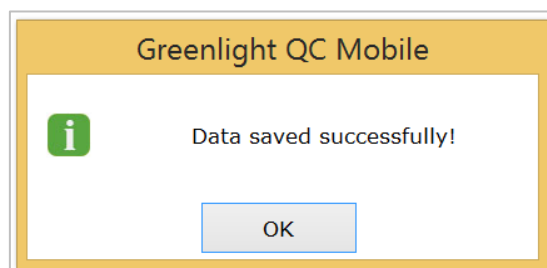
ADDING ATTACHMENTS TO CHECKS

1. To add an attachment, click **Attachments** at the top of the screen:
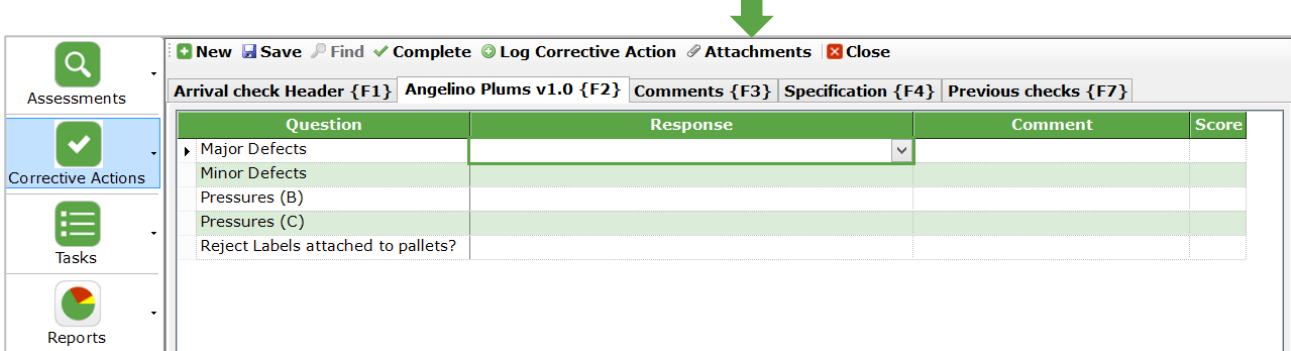
2. You will be navigated to your 'My Pictures/Documents' library. Select the images or documents you wish to attach and click **Open (Please note:** the attachment size limit is set per file attachment at 250KB. Any image that is bigger than this will automatically resize**)**.
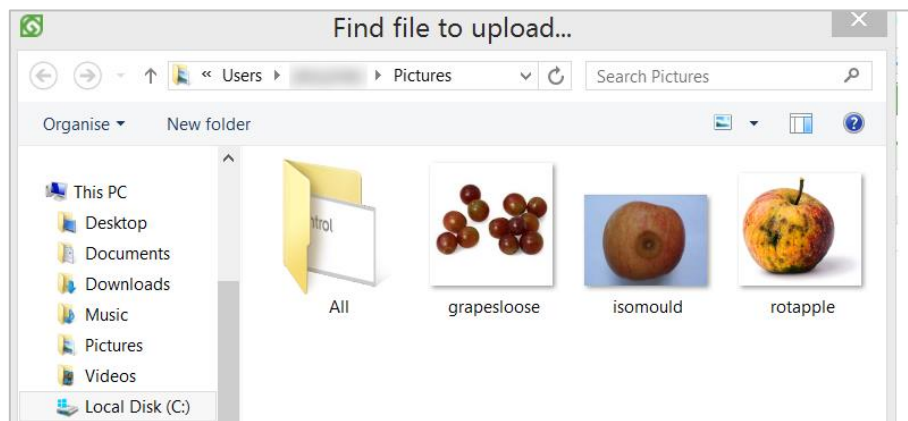
You will see the following pop-up containing your selected items.

3. You can add multiple items by clicking **New.**
4. Preview an item by selecting **View Attachment.**
5. Delete an item by selecting the row then clicking **Delete.**
6. When you have finished attaching files, click **Close**. All items are saved and the attachments button at the top of the screen will be highlighted red to denote.
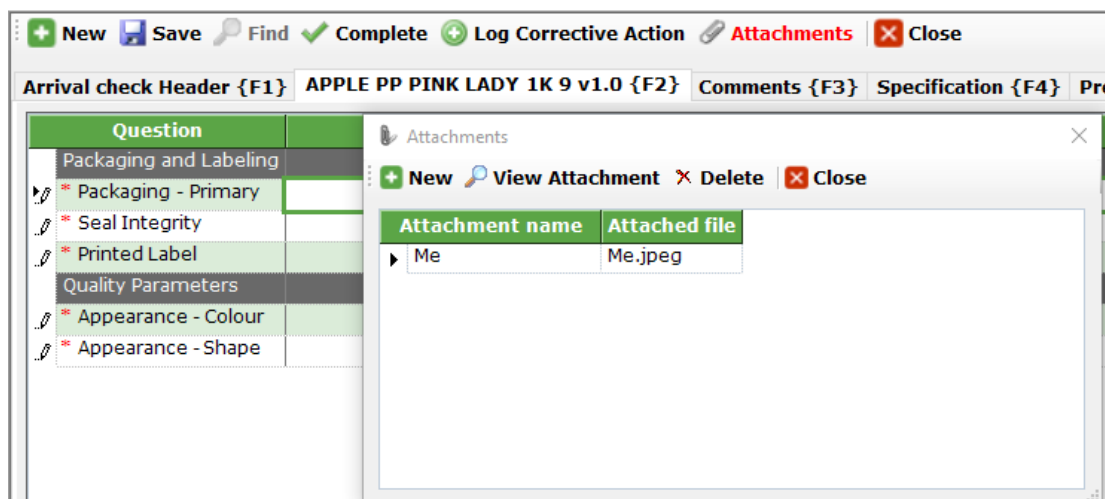
SAVE AN ASSESSMENT AND RETURN TO IT LATER

1. With the Assessment still open, click **Save** at the top left of the screen:
2. You will see a pop-up to confirm **Data Saved Successfully**. You can close the assessment by clicking **Close** at the top right of the screen.

3. To return to this Assessment, click on **Assessments** in the toolbar and select the type.
4. Click on the **Previous checks** tab (F7).
5. This will open a screen showing all Assessments (complete and incomplete, viewable by clicking the 'show outstanding' tick box as shown above). Double click on the Assessment you want to open. Please note you cannot load and edit a completed assessment.
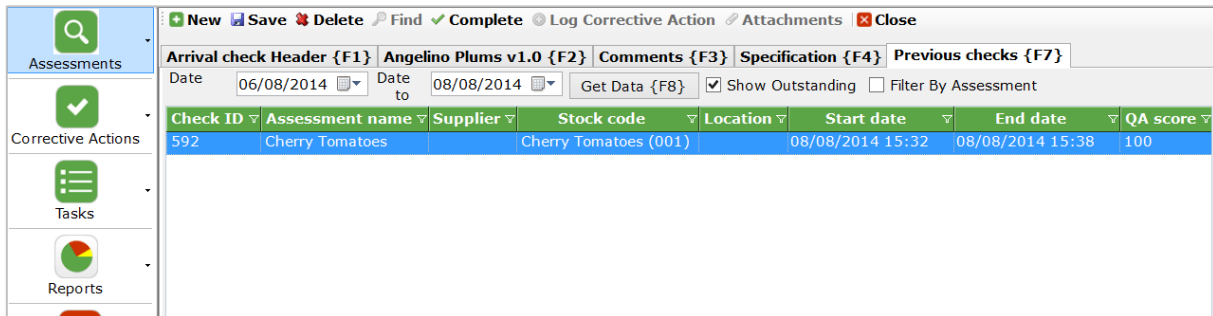
Please note:

- You can filter assessments in the Previous Checks tab by clicking on the filter icons next to the title of the column you wish to filter.
- You can access incomplete assessments by clicking on the **Outstanding Actions** link in the bottom left of the screen. This list will include Corrective Actions, Tasks, and Assessments to be completed.
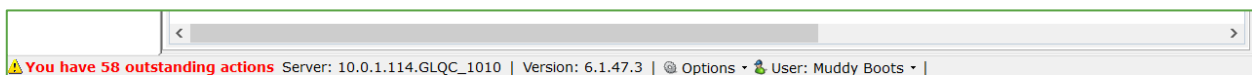
DELETING INCOMPLETE ASSESSMENTS

If you have saved a check but do not want to complete it, you can delete it in the **Previous checks** tab as follows:

1. Click **Assessments** and select the type of check you want to delete.
2. Click the **Previous checks** tab. This tab will show all checks that have been saved on the device between the dates stated at the top of the screen.
3. Click on the check you want to delete.
4. Click the **Delete** button at the top of the screen.
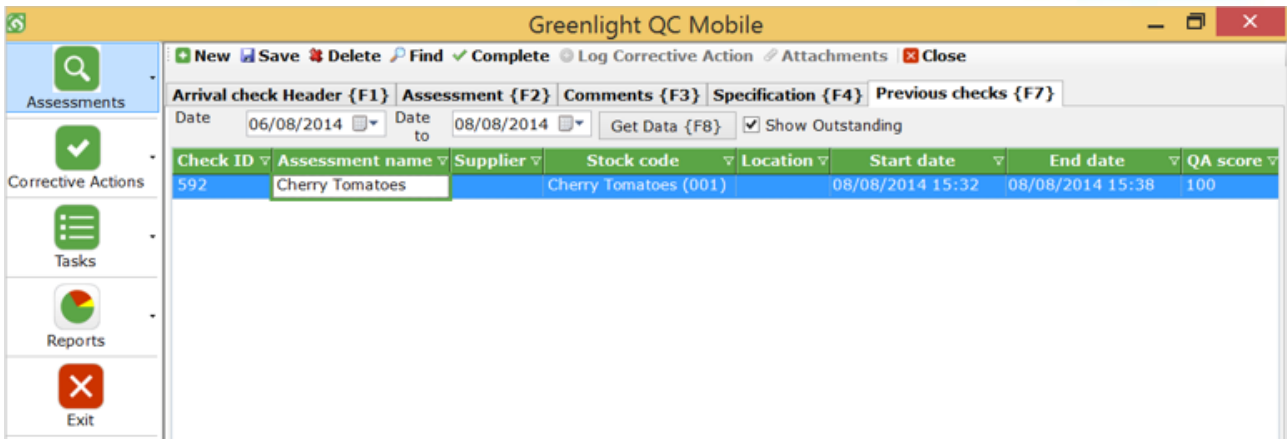
5. A pop-up will appear to confirm you want to delete the check.
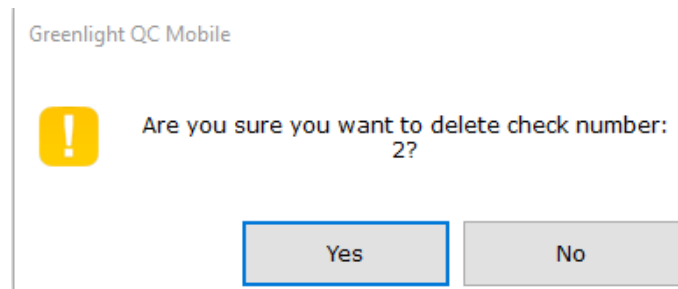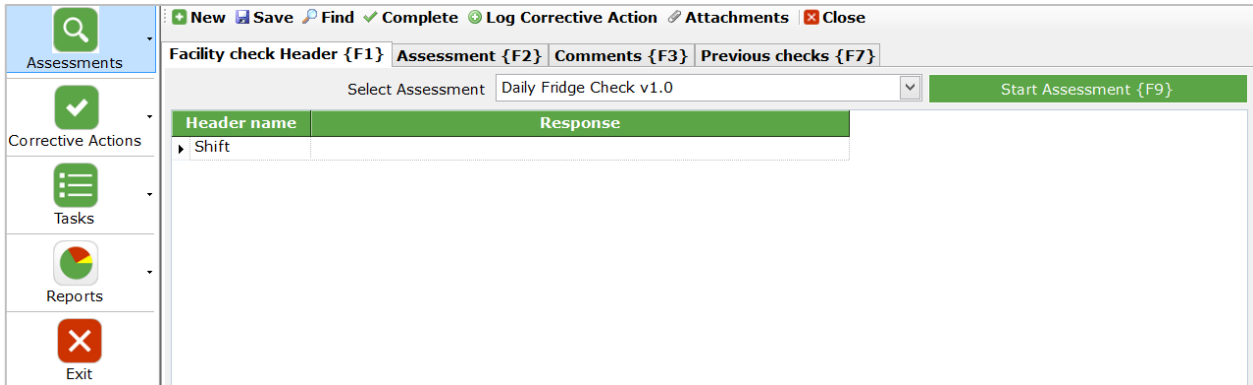
Please note:

- This screen only shows checks saved on this device. Therefore, you will not see or be able to delete checks saved on another device.

FACILITY CHECKS

Facility check headers are slightly different in that you will select the assessment first and then complete the header questions:

1. Click **Assessments** in the toolbar and select **Facility check.**
2. Choose the assessment from the **Select Assessment** box at the top of the screen.
3. Complete the header questions.
4. Click **Start Assessment** or press {F9}.
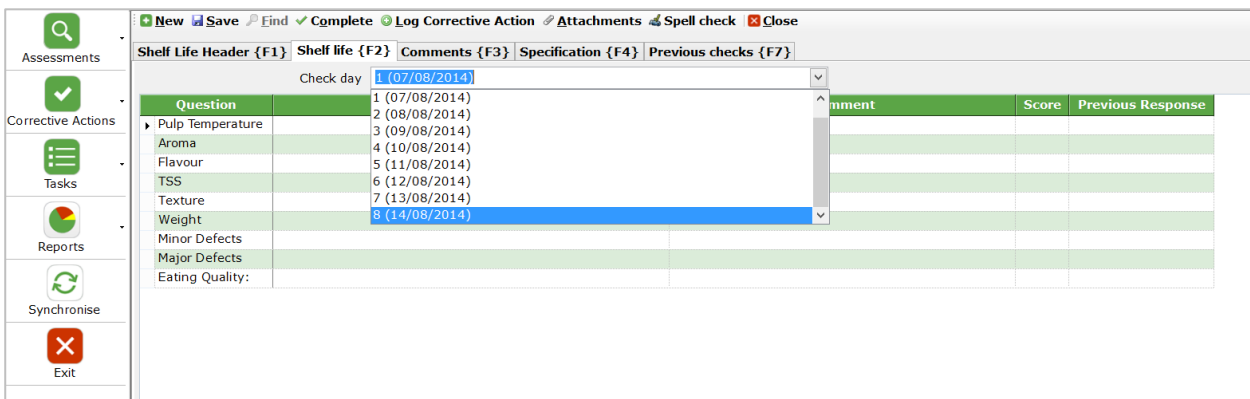
You will navigate to the **Assessment** tab to continue the check as normal.

SHELF LIFE TEST CHECKS

To complete a shelf life test check, the user must save the check on each day they assess the quality of the product and finally, complete the check on the last day (after all individual day checks have been recorded):

1. As per other checks, start a Shelf life test check by clicking **Start Assessment** in the header tab after you have answered the header questions and chosen the assessment. You will be taken to the next tab as normal.
2. Select the day of the check from the **Check day** drop down at the top of the screen.
3. Respond to the check questions as required.
4. Instead of completing, make sure you save the check by clicking **Save** at the top of the screen.
5. To enter the next day's check, re-open the in-progress assessment by navigating to the **Previous Checks** tab and double clicking (refer to bullet #10 of 'Performing a Check' to see how do this).
6. Select the next **Check day** from the drop down in the **Shelf Life Assessment {F2}** tab and respond to the questions for that day – Click **Save**.
7. Re-open the same check for each day that you need to assess the product and save each day as above.
8. At the end of the check, click **Complete** and all responses recorded across all days will be stored as one Shelf Life Check.

Please note:

- You will not be able to complete the check until you have assessed the quality of the product on or after the DU date.
- The DU date of the product is the day highlighted with an asterisk in the check day drop down list.
- DU = Display Until.

Here is an example of Shelf Life Check Report:

QC CHECK REPORT

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Overall QA score	RED	
Location	Location 1	
Product	Apples - Braeburn (18)	
Supplier	Supplier A	
Customer		
Depot Date	19/05/2016	
Test Type	Ambient	
Check no	1191	
Assessment name	Demo Shelf Life check v1.0	
Assessment type	Shelf life test	
Date assessed	19/05/2016	
Assessed by	Muddy Boots	

Day	Rot	Wet Rot	Discoloured Bruise	Eating Qualities	Quality Score
0	No (example comments)	No	No	4	8
1	No	No	No	2 ()	5
2	Yes	No	No	2	2

Comments overall comments

MULTI-CHECK

It is possible to set up Greenlight Quality Control Mobile to allow a user to complete multiple checks simultaneously, instead of completing one at a time. This significantly increases the speed of completing checks, especially in time-pressured environments. *Please contact Muddy Boots if you are interested in using this feature and do not currently have it enabled; this feature is called 'Multi-Check' and will be a new assessment type.*

Please note:

- The individual checks within a Multi-Check are called child checks.
- All child checks will use the same assessment.
- All checks will need to be completed at the same time, or the check will need to be saved in-progress.
- Each child check within a Multi-Check has its own responses, overall QA flag, score and comments.

If your subscription includes Multi-Check, you will see the option within the list of your available assessments.
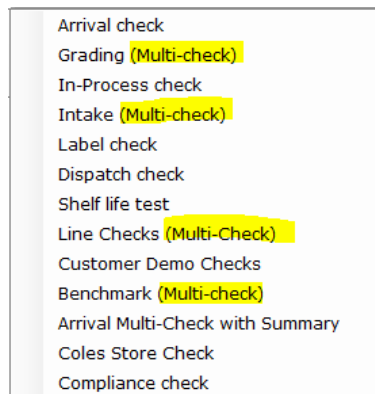
To complete multiple checks:

1. Fill in the header questions, select the desired assessment at the bottom of the screen and click **Start assessment**. You automatically move to the **Multi check {F2}** tab.
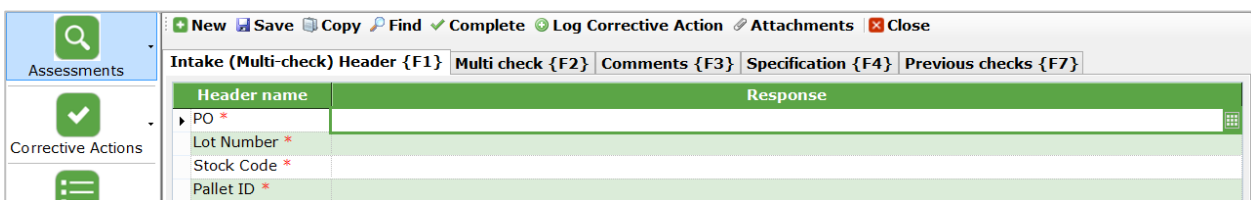
2. Enter the **Number of checks** needed - Click the -/+ icons or type in how many checks you wish to conduct to create the check columns (the image below shows 3 child check columns created).

3. You can now enter in your question responses for each check.
   It is possible to copy responses from one question in the first check to the subsequent checks by double clicking on the question.
   It is possible to copy an entire check by double clicking the column header of the check. This will copy the question responses from the check on the left of it.

4. To add a comment to an assessment question response, click the speech bubble icon button in the response box. The question response box will flag a comment has been added by displaying a triangle on its left.

5. Add attachments by clicking in any question cell of the relevant check and click the **Attachments** button at the top of the screen. The child check the attachment is associated with will be indicated when you select the **Attachments** button.
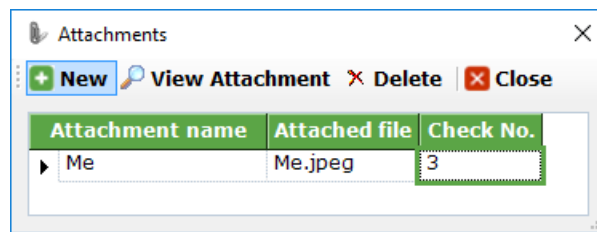

6. To raise an ad hoc Corrective Action for one of the checks, click in the relevant question response cell and click **Log Corrective Action**.
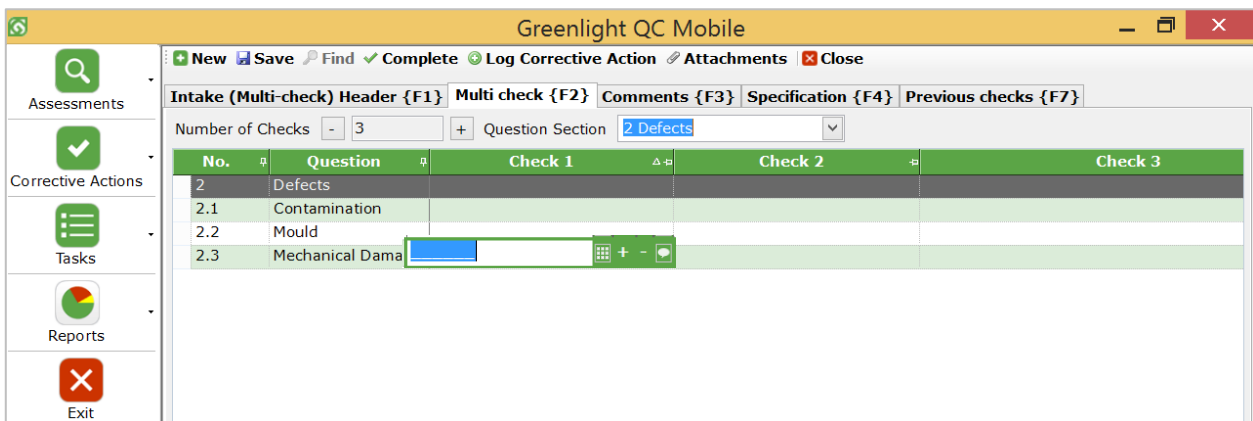
7. The overall score, QA flag and overall comments are displayed at the bottom of each column. Add **Overall Comments** and edit the **QA Flag** if required:

8. Complete all checks simultaneously go by clicking **Complete** at the top of the screen.

Please note:

- Some header questions will be copied across all checks and some header responses may not be editable. These are referred to as 'Fixed' or 'Variable' Headers and are set up by Muddy Boots.
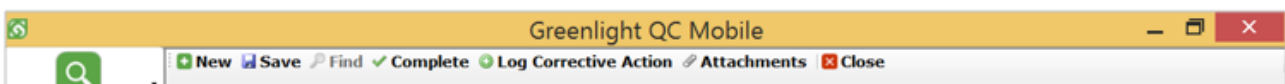- You can move back and forth between sections without completing all questions in that section.
- Corrective Actions (triggered or raised ad-hoc during a check) and attachments will only apply to the check they relate to, not all checks being completed.
- Each completed check can be viewed after completion in the QC Check Report.
- Some questions may be hidden and are only displayed if you answer a question with a red flag response. For example, if you answer 'No' to a question with this hidden response, an additional question will appear. You only need to answer these questions for the check with the red flag response.

Below is an example of Multi-Check Check Report (with Summary column) for Arrival Checks:

MULTIPLE QC CHECK REPORT

greenlight

Average score	100

Product	Pineapple (4)	Exporter	dr
Importer		Vessel Name	
Arrival Date	07/07/2016	Arrival Port	
Quantity		Inspection Date	
Container Number			

Assessment Name	Pineapples v1.0	Assessment Type	Arrival Multi-Check with Summary
Date Assessed	07/07/2016	Assessed By	Muddy Boots
Check no	1256		

Variable Header	Check 1	Check 2	Check 3	
Label				
Code ID				
Pallet Number	1	2	3	
Question	**Check 1**	**Check 2**	**Check 3**	**Summary**
Basics				
Count	10	10	10	30
Temperature	10.40	7.00		5.80
Weight				
Min Fruit Weight	0.50	0.80		0.43
Max Fruit Weight	0.60	0.90		0.50
Tare				
Net Weight	2.17	2.47		4.64
Underweight	25	0		
Overweight	0	100		
Gross Weight	2.17	2.47		1.55
Brix	13.00	15.00		9.33
Quality				
Appearance*				
Good	10	10		20
Fair				0
Poor				0
Overall Score	100	100	100	
QA Flag	Green	Green	Green	

Comments

Question	Check	Comments
Net Weight	Check 1	0.6

CORRECTIVE ACTIONS

It is possible to log ad hoc Corrective Actions. However, during a QC Check you may find one is automatically triggered. Corrective Actions can be logged and completed as part of the check or can be viewed and completed afterwards by using the Corrective Action Manager screen, as detailed below. Corrective Actions can be assigned to Mobile users or may be assigned to other users outside of Greenlight QC Mobile. To complete a Corrective Action in Mobile after a check has been completed:

1. Click on **Corrective Actions** in the toolbar and select **Corrective Action Manager** from the submenu.
2. At the top of the screen, select the status of the Corrective Actions you want to see.
3. Add a filter (if required) by ticking the **Filter Data** tick box and selecting a filter.
4. Change the dates (if required).
5. Click **Refresh** to refresh the list.

6. Double click on a Corrective Action to open it.
7. View the details on the **Corrective Action** tab.
8. Click the **Complete** tab and change the **Status.**
9. Add details to the **Action taken** box and **Comments** box (if required).

10. Click **Audit Trail** to see a history of the Corrective Action
11. Click **Save and Close** at the top of the screen.

TASKS

QC ACTIONS

The **QC Actions** function enables users to view a grid of completed checks and perform set actions against a check, such as voiding a check, overriding a rejection or updating the QA Flag. By voiding a check you, can return to the check and edit any part of it (if required). The QC Actions screen allows you to answer or edit the Footer Questions. Suppliers, Assessors and notification groups can be notified of these changes (if required).

Please note: It is possible to perform QC Actions on completed checks via Greenlight QC Office Web.

### USING QC ACTIONS TO EDIT A COMPLETED CHECK

1. Click on **Tasks** in the toolbar.
2. In the submenu that opens, click on **QC Actions.**
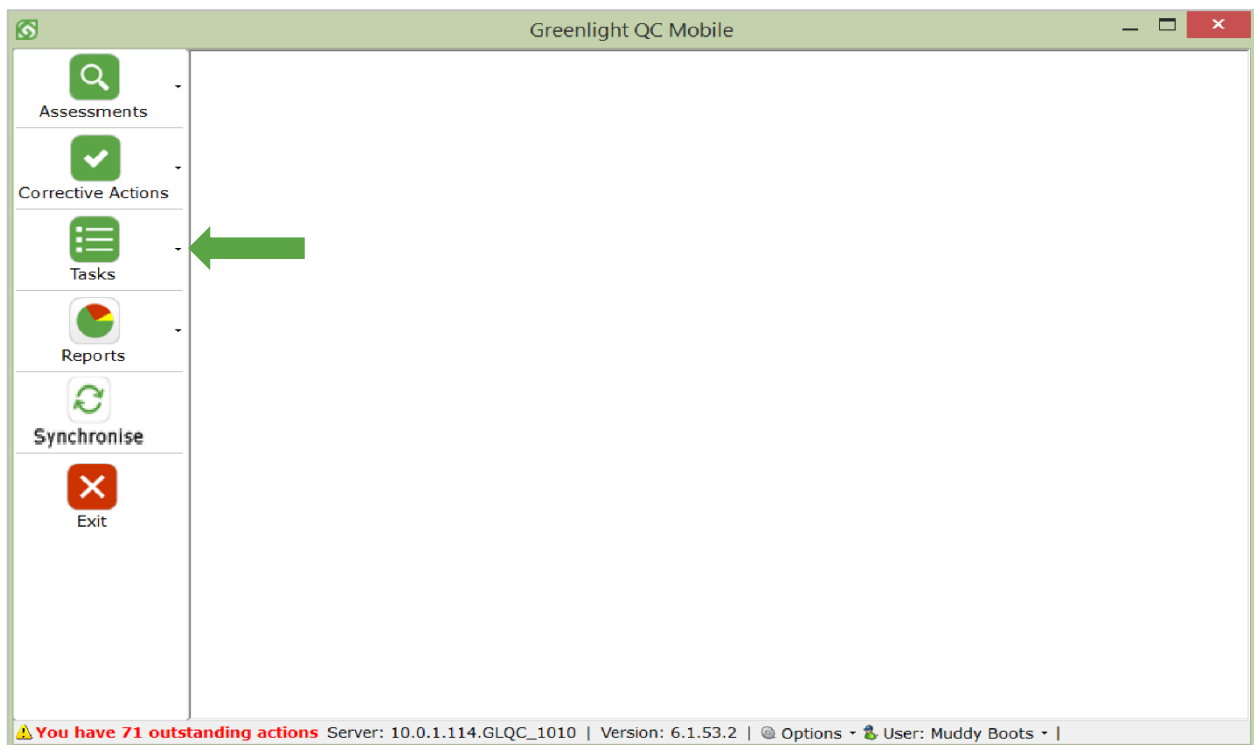
3. The screen that opens gives you details of all completed checks. Filter the checks by choosing options at the top of the screen:
   - Assessment Type (e.g. arrival)
   - QA Flag (Red/Amber/Green)
   - Date from and Date to

As you make your choices, the grid will automatically populate.

4. Click on the check you want to perform a QC Action on.
5. You can answer or edit the Footer Questions at the bottom of the screen (if applicable).
6. At the bottom of the screen, select an option from the **Action** dropdown menu you want to apply to the complete check (if applicable).
7. To update the QA Flag, select the appropriate option from the **Update QA Flag** drop down menu.
8. Tick the **Notify Group** box if you want to send a notification to a User Group. Wait for the screen to reload to show a drop down list of notification groups you can select from.
9. If you want to notify the Supplier or Assessor of these changes, tick the **Notify Supplier** or **Notify Assessor** check box.
10. Add relevant comments to the **Comments** field. This field is mandatory.
11. Click **Update**.
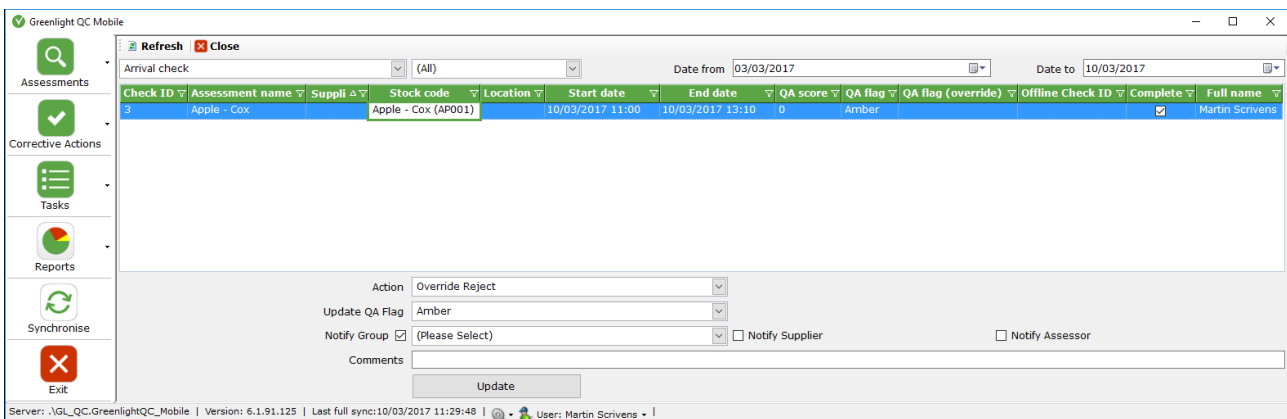
UPDATING COMPLETED CHECKS USING THE 'VOID CHECK' OPTION

12. If you select **Void Check**, a pop-up will appear asking 'Do you want to update details for the void check?' click **Yes** if you want to open the check and edit it. Click **No** if you want to void and discard the check.
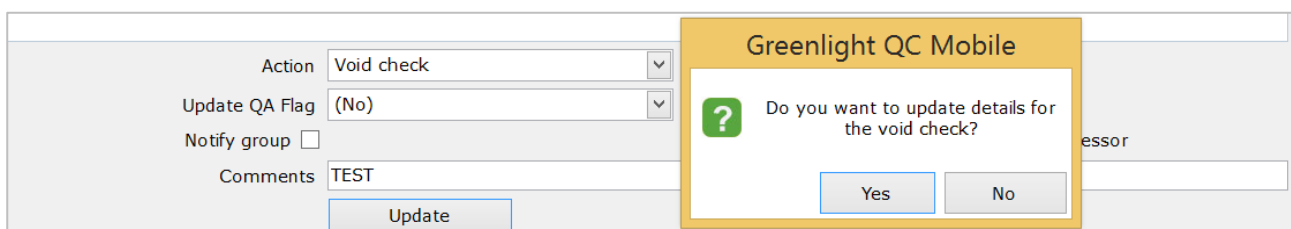
REPORTS

1. Click on **Reports** in the Toolbar.

Choose the report you want to view from the submenu that opens. The following reports may be available:

- Scorecard Report
- QC Check Report
- Sampling Report
- Supplier Profile Report
- Corrective Action Report

2. Reports are intuitive; as an example, to create a QC Check Report:
   a. Select an Assessment Type to see relevant completed check reports.
   b. Select a date range from the **Date From** and **Date To** calendar boxes.
   c. Select an option of **Detailed** or **Summary Report** for a full report on one check or a summarised report collating multiple checks.
   d. Select the check(s) you want to create a report for by ticking the box to the left.
   e. Click **Preview** to view the report.
   f. You can also choose to **Show Corrective Actions** and **Show Guidance Notes** by ticking the relevant options.

QC CHECK REPORT

Overall QA score	96		

Area(Ha)		Location	
Product	10 Orchids (MN778899)	Supplier	
PO		Variety	
Arrival Date	10/03/2017	Country of Origin	
DU Date		Quantity Received	
Supplier Approved			
Check no	4	Assessment type	Arrival check
Date assessed	10/03/2017	Assessed by	Martin Scrivens
Assessment name	10 Orchids (MN778899) v1.0		

| No.	Question	Response	Score
1	Sample Counted		
2	Packaging Elements*		
2.1	Packaging	Green	0
2.2	Labelling	Green	0
3	External Appearance*		
3.1	Shape	Amber	2
3.2	Size	Green	0
3.3	Colour	Green	0
3.4	Progressive Defects	Green	0
3.5	Non Progressive Defects	Green	0
4	Aroma*		
4.1	Aroma	Amber	2
5	Texture*		
5.1	Texture	Green	0
6	Bruising	GREEN	0

Comments

LOGGING OUT

A user must always **Synchronise** before logging out of Greenlight QC Mobile. To log out, click **Exit** from the toolbar.
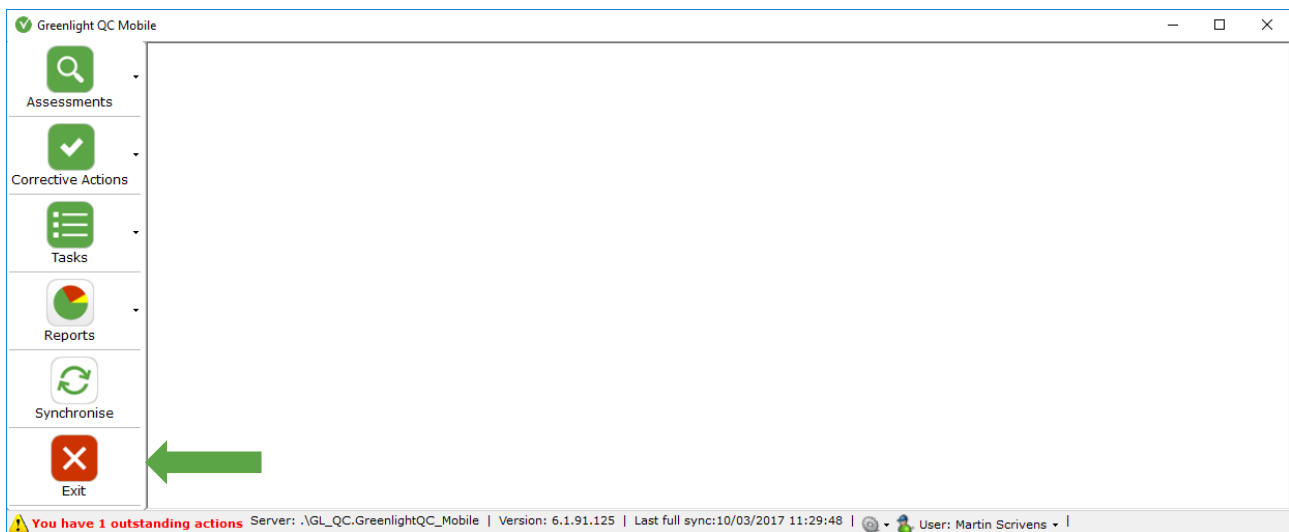
Please note: The system will warn you if you have left any assessments open or have not synchronised some checks back to the server.

SENDING SYNC LOGS

To send sync logs to Muddy Boots Support, click **Options** and select **View logs.** In the screen that opens, you can view the **Error Log** and **Sync Log**. Click the **Email** button and **synchronise** to email both to the Muddy Boots Support Team.

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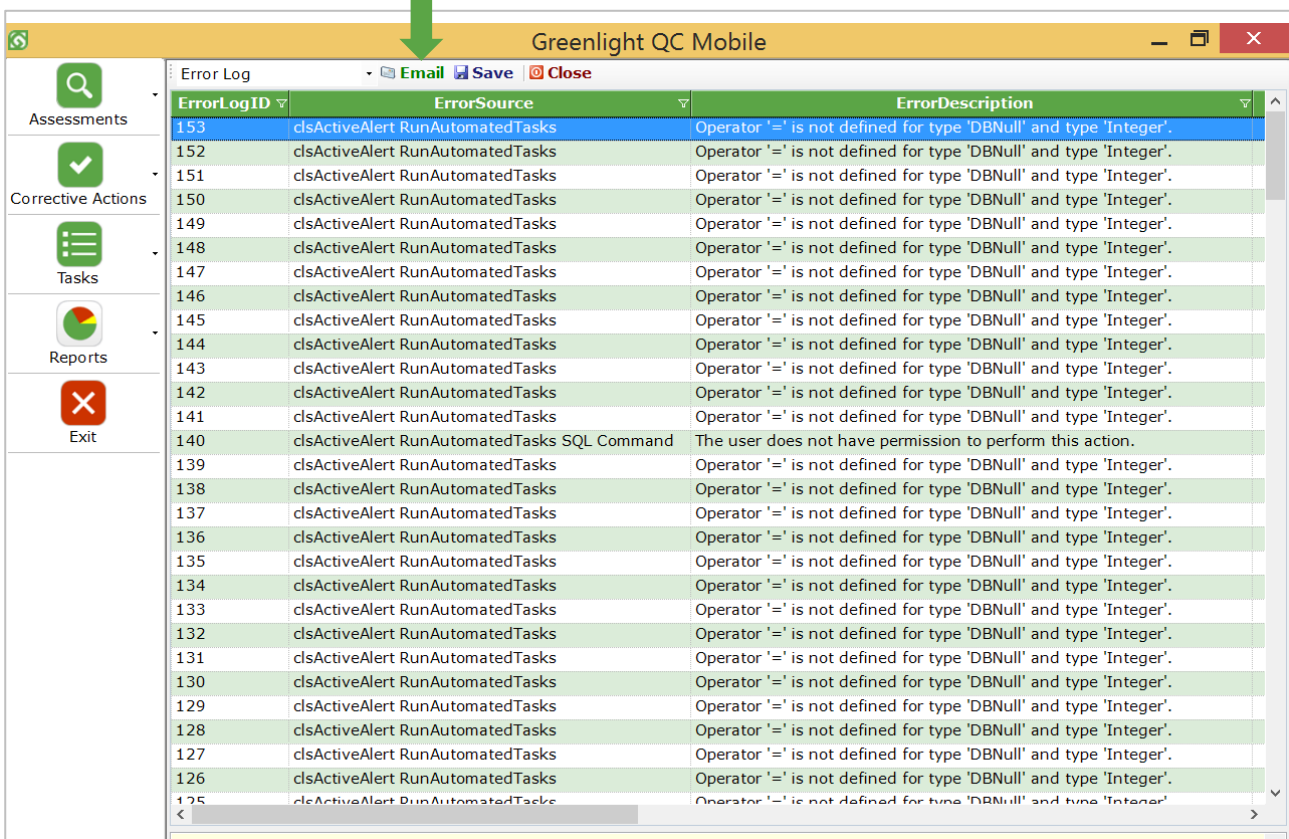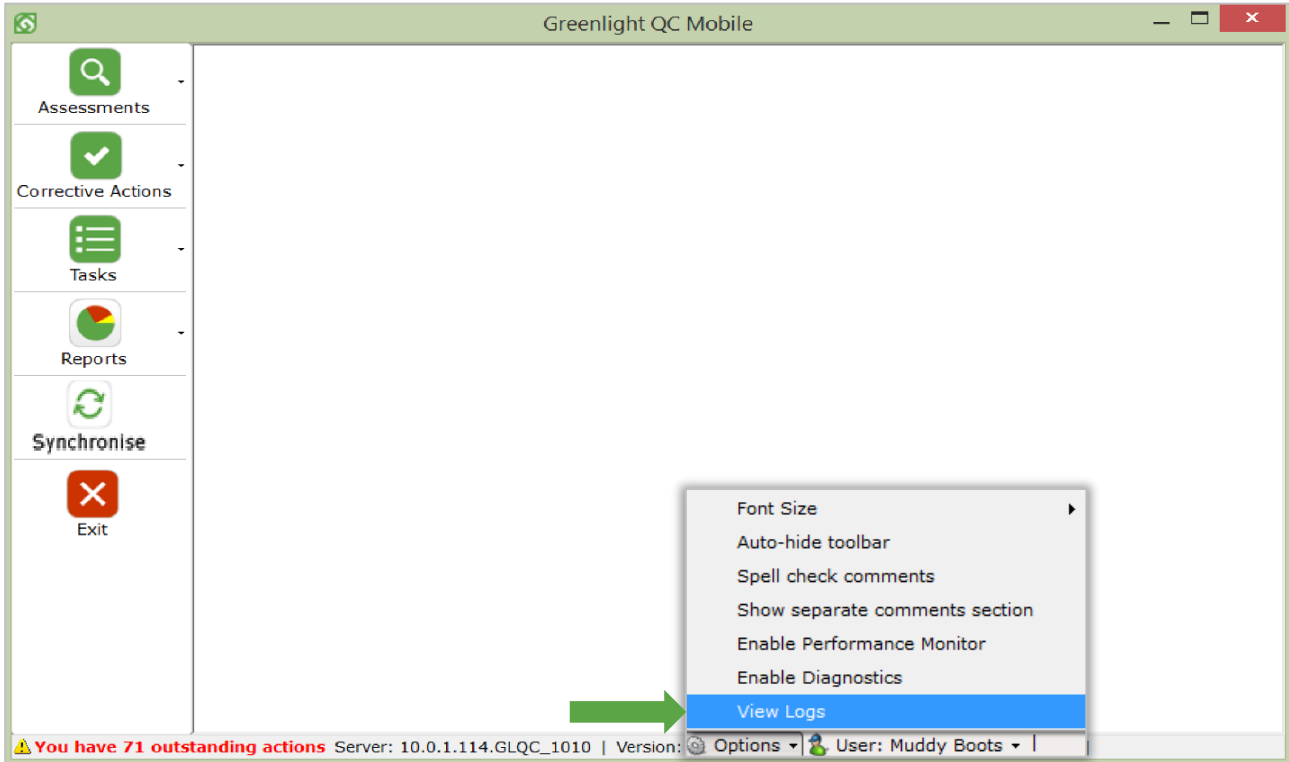
Contact Us

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. For information on training sessions, webinars and user materials, please contact Product Adoption via productadoption@muddyboots.com.

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