



Version 2.0 App Manual



Table of Contents

New User - Getting Started	6
Signing in for the First Time	6
Creating the App	7
New User Training	12
Tasks	12
Location	12
Inspection	12
Manager Training	13
Dashboards	13
Ops	13
Scorecard	13
Reports	14
Reset Forgotten Password	15
Option 1	15
Option 2	16
Real-Time Collaboration	17
How to Use BlueTooth Thermometer With App	19
Guided Setup	20
Intro	20
Help Resources Tour	20
New Location 1 of 2	23
Locations Tags 2 of 2	26
User Filters - Creating & Assigning	27
Preloaded Checklist Overview	31
Schedule Question Sets	32
Creating and Applying Location Filters	35
Tags and Rules	37
Tags	37
Rules	37
Roles	39
Administrator Role	41



Inspector Role	41
Checklist Management Role	41
User Management Role	41
View Reports Role	41
Creating a New User (1 of 2)	42
Tags and Notifications (2 of 2)	44
Conclusion	47
Inspector Module	48
Response Filter	48
Dashboards	49
Ops	49
Scorecard	51
Reporting	55
Question Response Report	55
Question Response Count Report	56
Question Set Count Report	58
Critical Violation Dashboard Report	59
Lowest Scoring Question Set Report	62
Scheduled Question Sets Report	63
Scheduled Question Set Count Report	64
Scheduled Question Sets By Location	65
Question Sets By Day	67
Question Sets by Location	69
Custom Report Filters	71
Notifications	73
Overview of Notifications and Alerts	73
Configuring Your Notifications	74
Setting Up On Device Notifications	75
Tasks and Messages	77
Task Overview	77
The Task Notification Bar	77
Managing Tasks - Inbox	78
Creating Tasks	79
Ad-Hoc Tasks	79
Action Plan Tasks	84
Completing Tasks	87
In App Messenger	88



Admin	90
Changing the Portal Logo	90
Organization Management	91
Switching Organizations	92
User Management	93
Editing Passwords	93
Removing a User	93
Add New User	95
Roles and Users	97
Checklist Mgt	97
Inspector	97
User Mgt	97
View Reports	97
Administrator	97
Location Management	98
Inheritable Box	99
Tags	99
Question Set Management	100
Overview of the Question Set View	100
Creating a New Question Set	101
Edit a Question Set	105
True/False Question Type	107
Number Enter Number Question Type	109
Number Multiple Choice Question Type	111
Enter Date Time Question Type	113
Enter Text Question Type	116
Text Multiple Choice Question Type	118
Picture Question Type	121
No Response Question Type	122
Question Set and User Filtering	123
Question Set Filtering	123
User Filter	125
Task-List Scheduler	131
Setting Up a Daily Schedule	131
Setting Up a Weekly Schedule	133
Asset Module	134
Asset Mgt Overview	135



Create an Asset Type	136
Create an Asset	137
Common Use Cases for Asset Mgt	138




New User - Getting Started

Signing in for the First Time

When your system Admin creates your user account, you should automatically get an email in your inbox.

1. Check your inbox for an email from OpsAnalitica. (Check spam and junk inboxes if the email does not appear in your normal inbox.)
2. Click the link to **Set your Password**.
3. The link will take you to OpsAnalitica.net to create a password.
 - a. Your password must be 8 characters long.
4. Select **Set Password**.
5. Go to OpsAnalitica.net, using your username and new password, login. (Always check the **Remember Me** box.)

iPad 9:51 PM 24%



Login

johndoe@gmail.com

.....

Remember me

Login

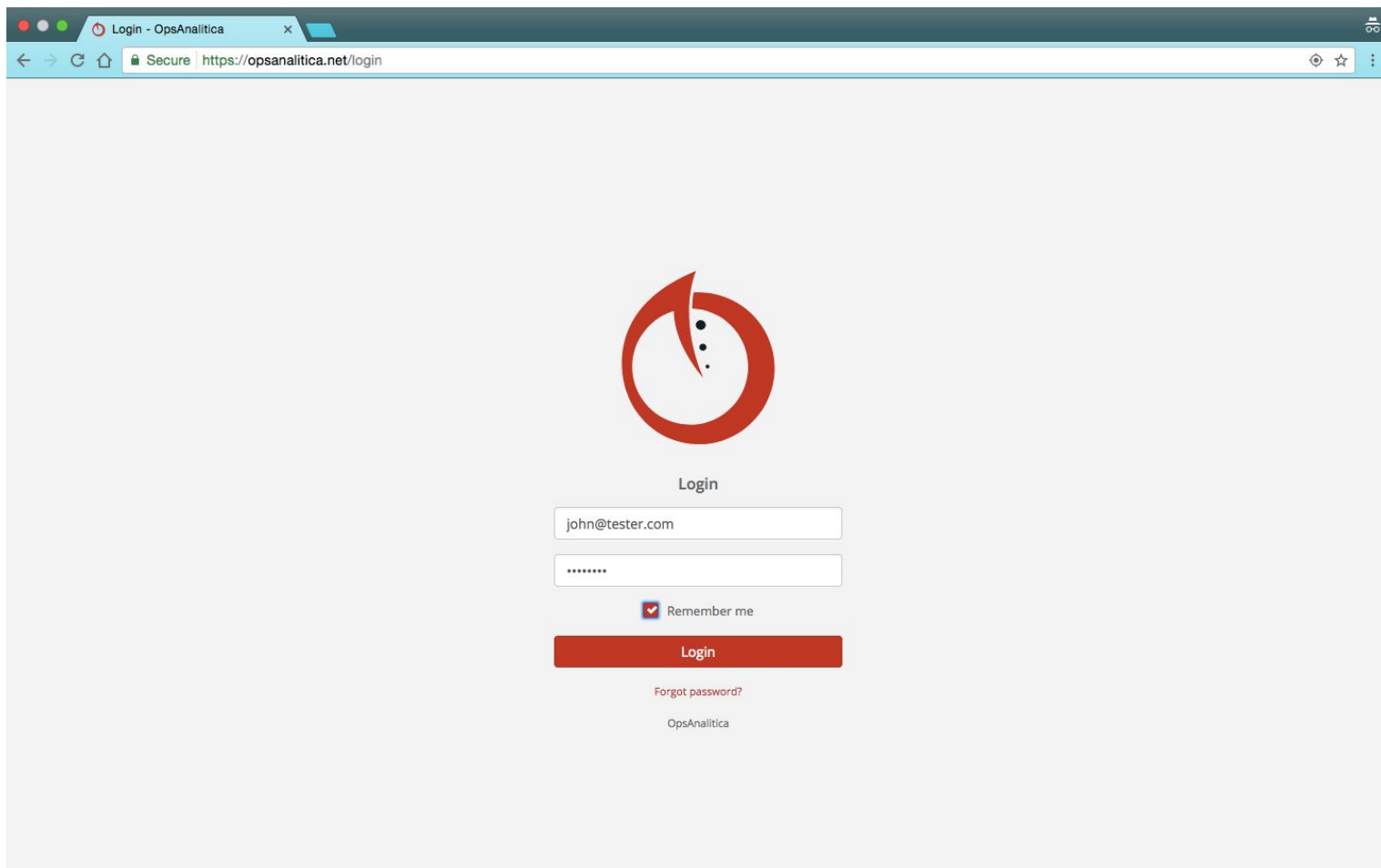
[Forgot password?](#)

OpsAnalitica



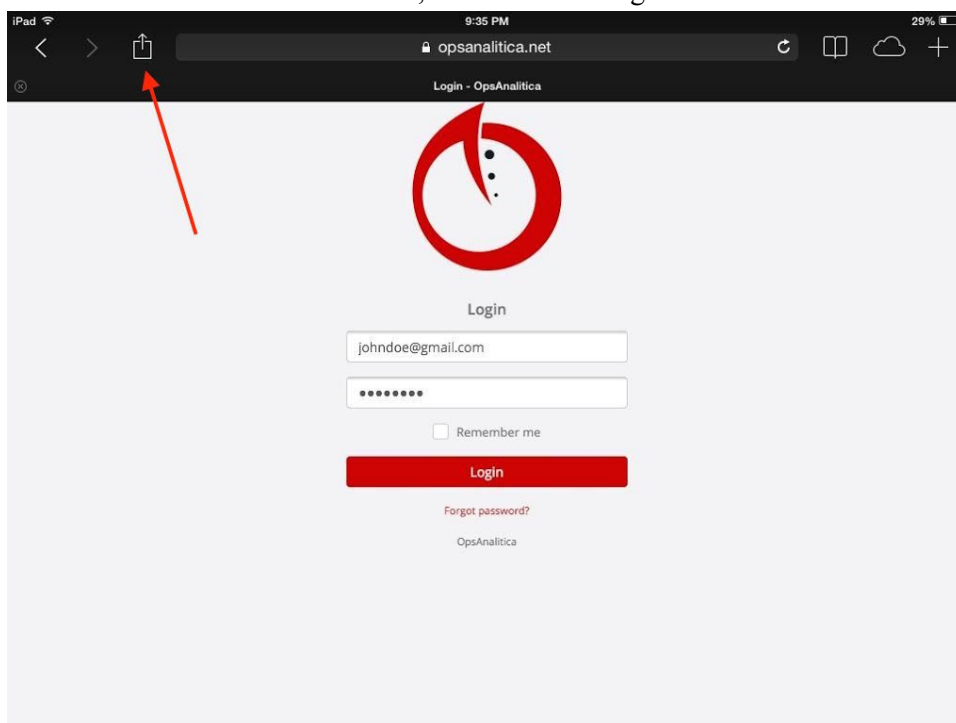
Creating the App

1. Go to OpsAnalitica.net.
2. Input **Username** and **Password** and select the **Remember Me** button.

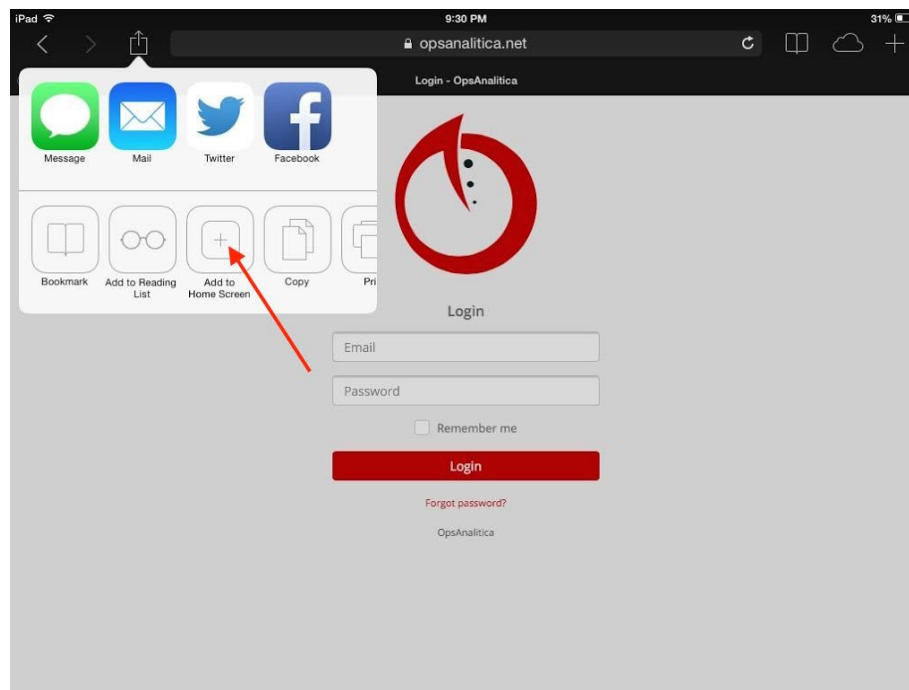




3. iOS DEVICES: In the home screen, select the 'sharing button'.



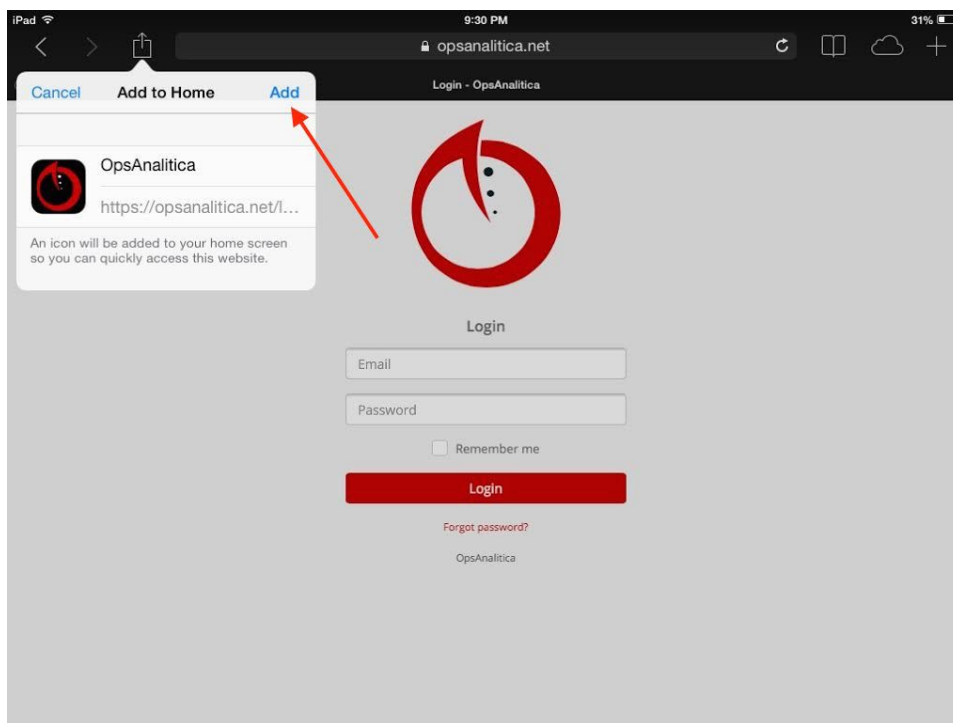
4. Select **Add to Home Screen**.



5. Select **Add**. (This should add the app to your home page.)

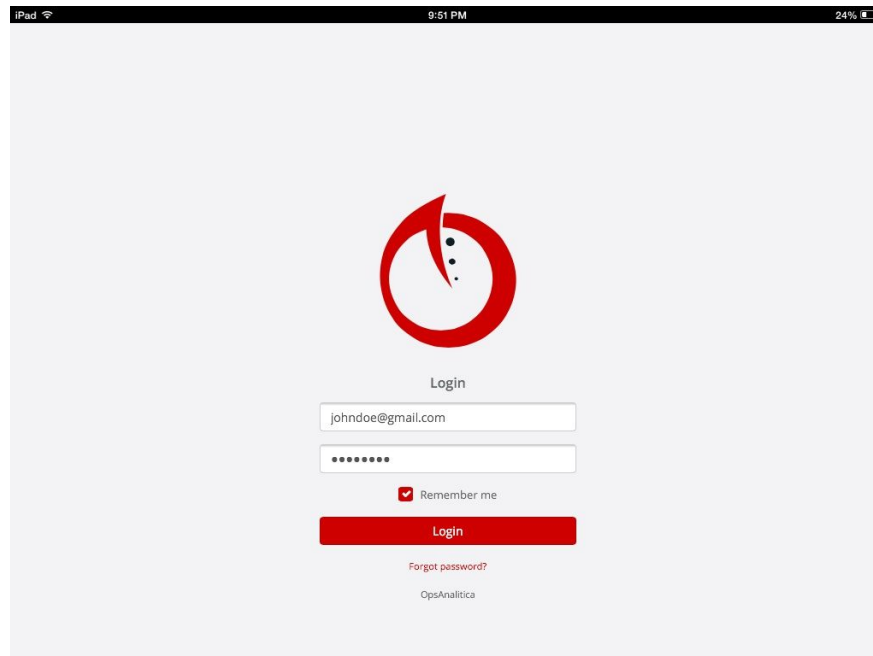


OpsAnalitica Version 2.0 App Manual



ANDROID DEVICES: In the home screen, select the ‘three dot button’ in the upper right hand corner of the screen. Select **Add to Home Screen** or **Add Bookmark**. This should add the app to your home page.

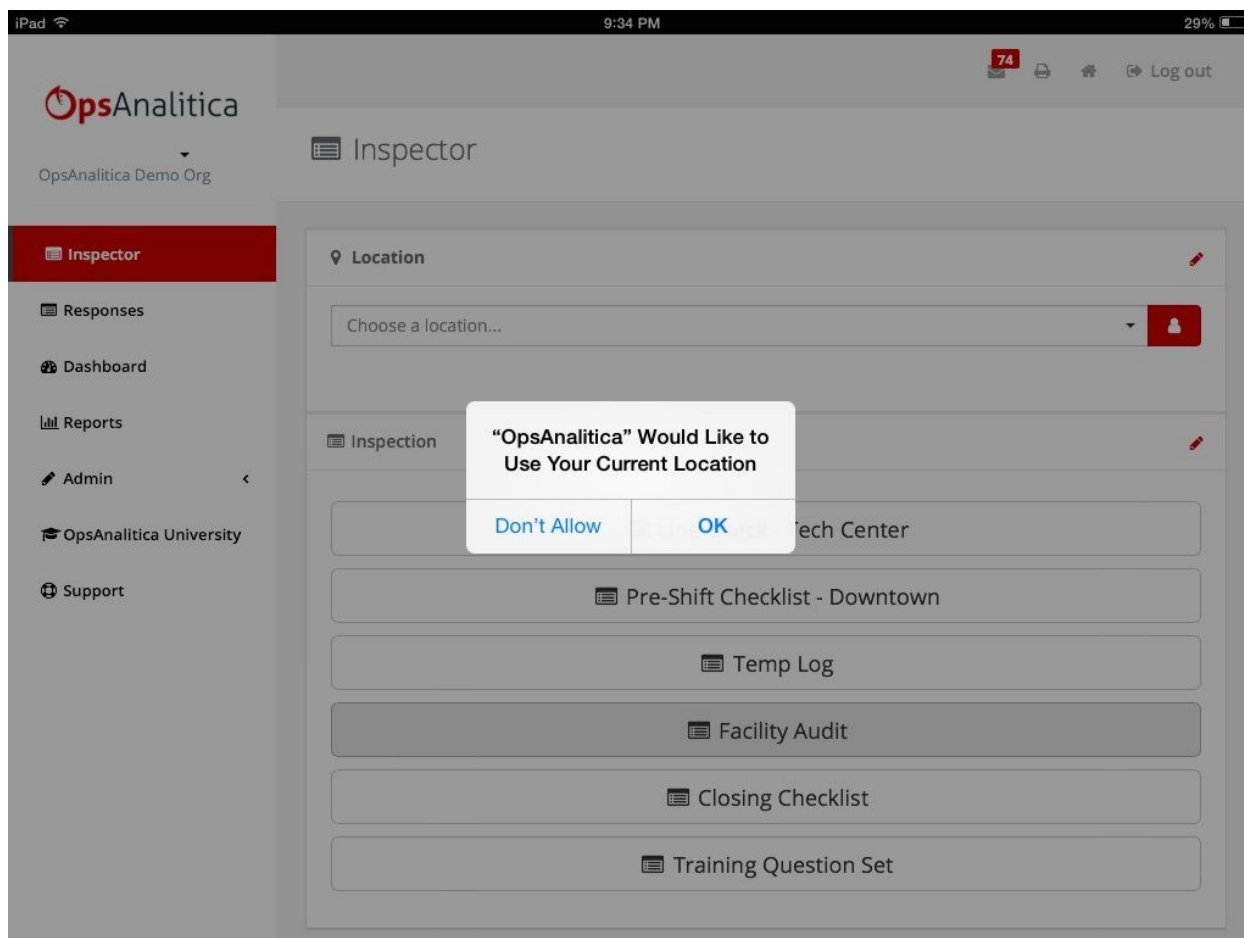
6. Click on the icon to open the app. Input **Username** and **Password**, then select the **Remember Me** button.



7. If the device asks to enable location services, always select **OK**. (This enables the app to find your geolocation.) In cases where the device asks to expand up to 50 megabytes of space for the database of the app, select **OK**. (While Ops Analytica will not take up 50 megabytes of space, the app needs the ability to do that.)



OpsAnalitica Version 2.0 App Manual





New User Training

A review of what appears on the landing screen every time the app is opened.

Tasks



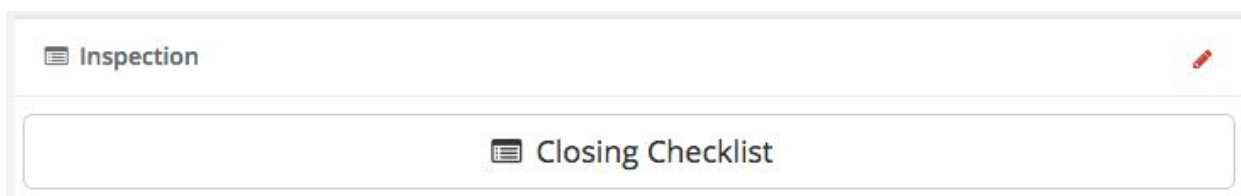
Shows you how many tasks are in progress and how many are overdue. These are tasks that have been assigned to you or tasks you have assigned to yourself. To create a new task, select the **New Task** button.

Location



Your location is automatically selected based on where your device or business is.

Inspection



A list of every inspection that is available in the app.



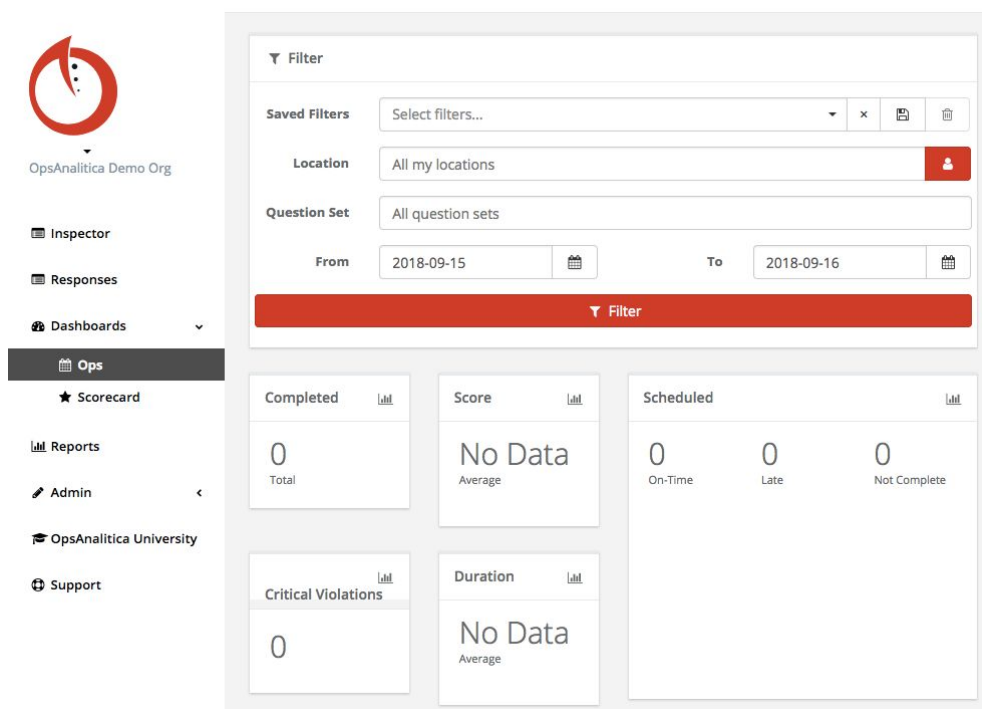
Manager Training

Using dashboards, reports, and how to add new users/manager users.

Dashboards

Ops

Shows how your team is doing at completing the checklists that have been assigned to them. Users are assigned to locations, along with checklists. A user filter determines which restaurants you have access to in this dashboard. Clicking on a box will take you to its reports.



Scorecard

Used to compare something to the whole (such as a comparison of one facility audit to all of them). The Category Score report allows you to look at individual questions and identify problems.



OpsAnalytica Demo Org

- Inspector
- Responses
- Dashboards
- Ops
- ★ Scorecard
- Reports
- Admin
- OpsAnalytica University
- Support

Scorecard Dashboard

Filter

Saved Filters: Select filters... [x] [print] [trash]

User: All users

Location: All my locations [user icon]

Question Set: All question sets

From: [calendar icon] To: [calendar icon]

Filter

All	Completed 819 Total	Score 76.65% Average Min: 0% - Max: 100%	Duration 10:05:26 Average Min: 00:00:00 - Max: 17.23:03
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Reports

A variety of reports are provided within the platform, including the Question Response Report and the Category Score Report. Each individual report is explained in detail later in the manual.

Report

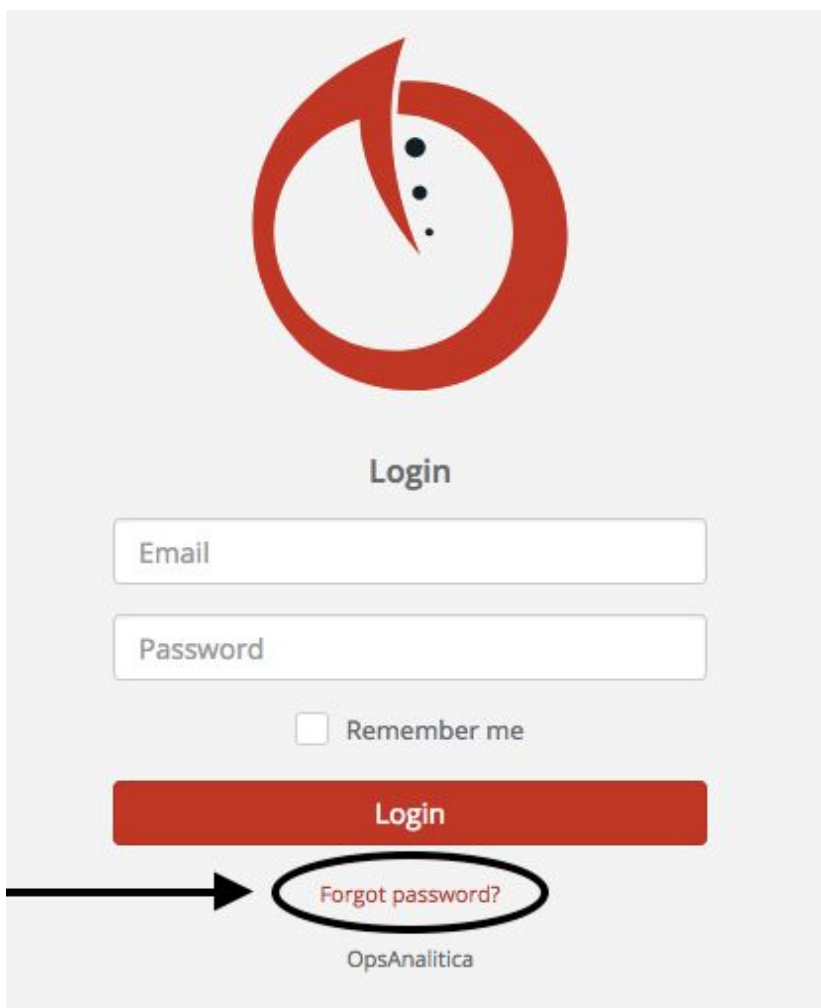
- Question Response Report
- Category Score Report
- Question Set Count Report
- Critical Violations Report
- Lowest Scoring Question Sets Report
- Scheduled Question Sets Report
- Scheduled Question Set Count Report
- Scheduled Question Sets By Location
- Question Sets by Day
- Question Sets by Location



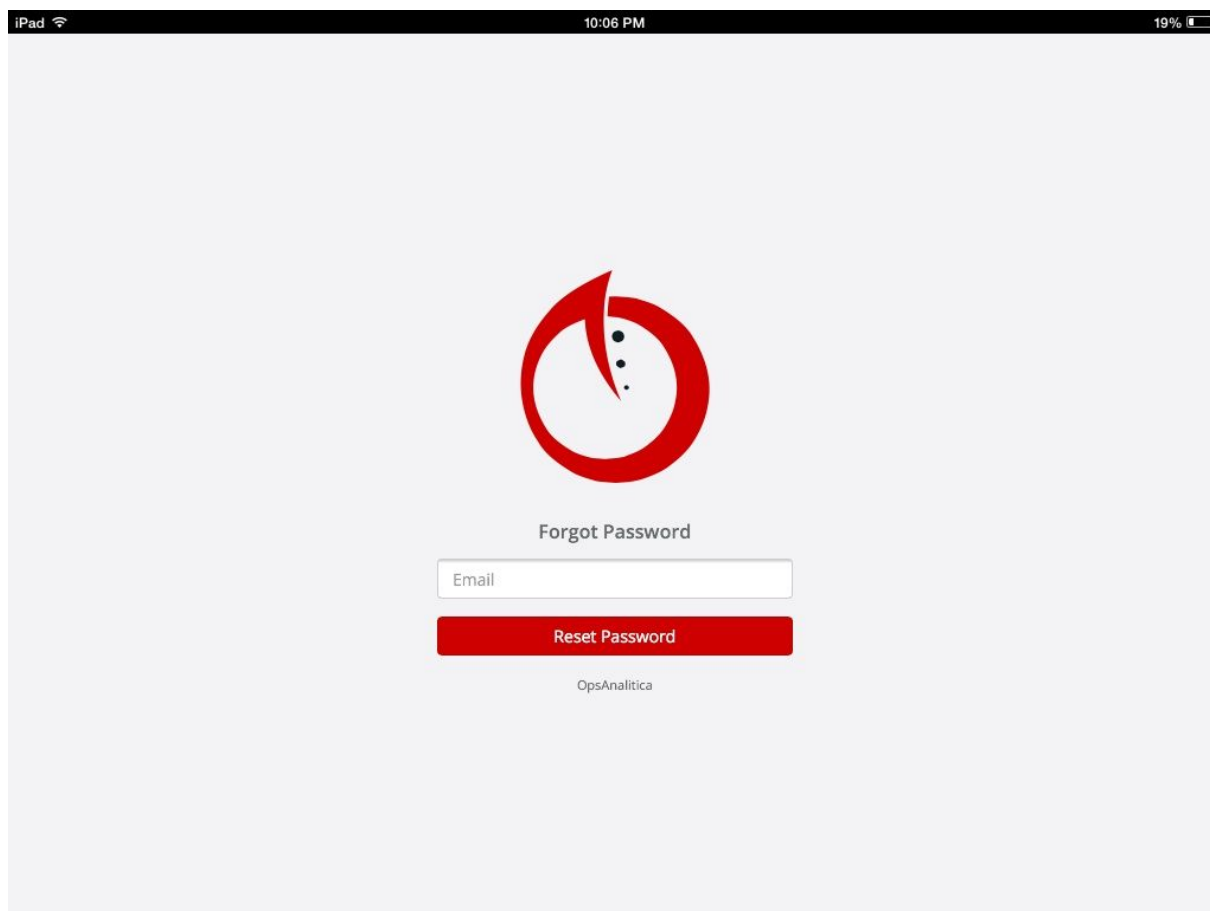
Reset Forgotten Password

Option 1

1. Open the OpsAnalitica app.
2. In the case of a forgotten password, select the **Forgotten Password?** link under the login button.



3. Input your email address and select **Reset Password**. The below screen should appear.



4. Proceed to your inbox and select the email labeled **Forgot password**. (If the email does not appear in your inbox, check your spam or junk folders.)
5. Click on the link in the email.
6. Input your new password in the **New Password** and **Confirm Password** boxes. (Both passwords must match and be 8 characters.)

Option 2

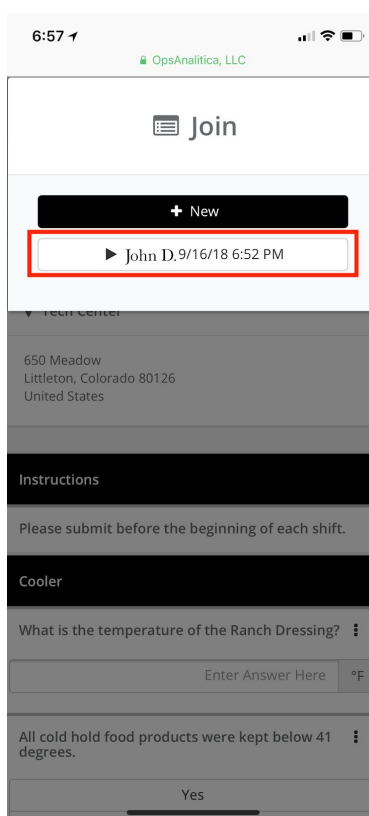
Contact the administrator of your company and have them change your password for you.



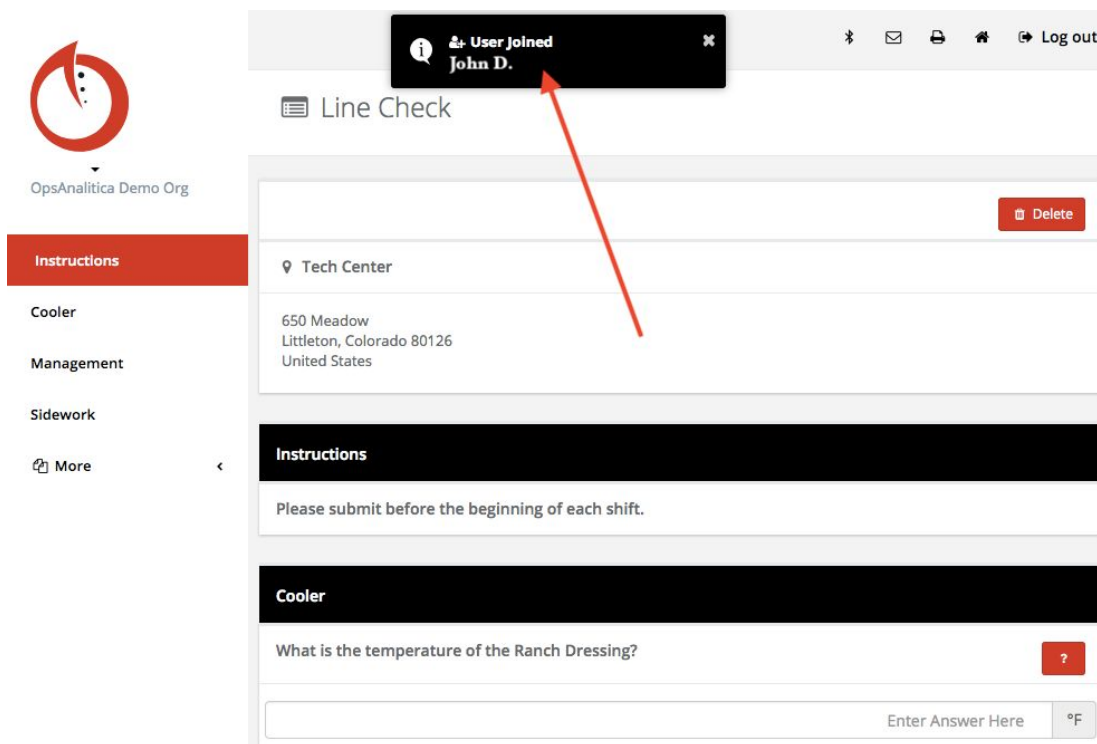
Real-Time Collaboration

Multi-user collaboration allows a checklist to be completed by multiple people simultaneously.

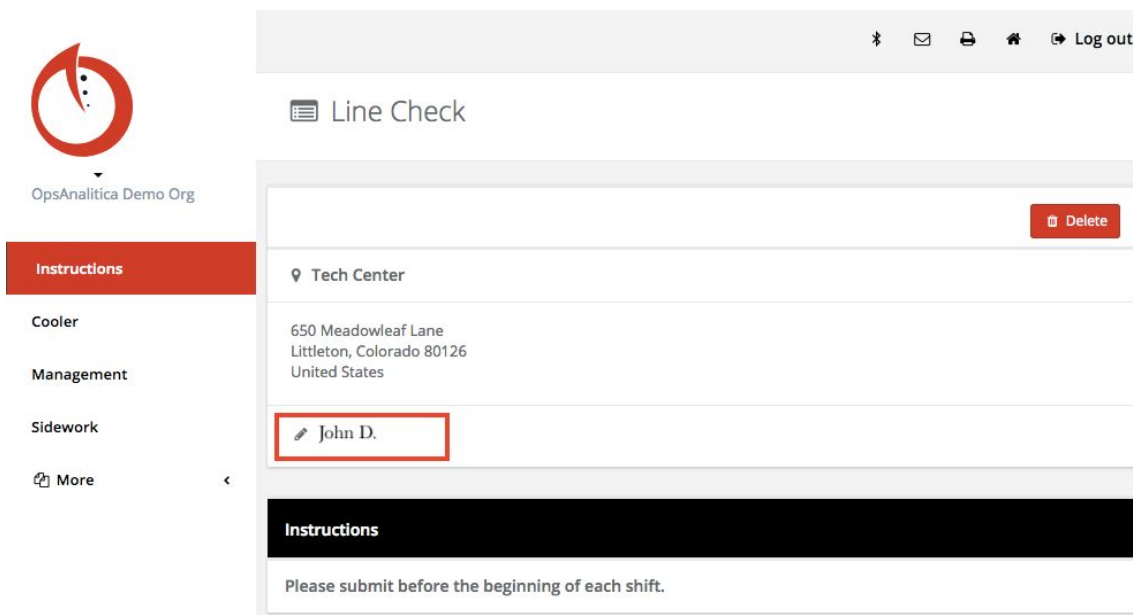
1. Open the OpsAnalitica app on your first device.
2. In the **Inspector** dashboard, select a Location and then select an Inspection (e.g. Line Check).
3. On your second device, open the OpsAnalitica app, select a location, and then select the same Inspection as in Step 2.
4. A notification will appear asking if you would like to conduct a new inspection or join one that has already been started on a separate device. Select the already started inspection to join it.



5. A notification will appear on your first device informing you another person has joined the checklist.



- 6. Changes to questions will update on each device almost instantaneously.
- 7. At the top of the inspection a list of each person who has answered a question is documented.



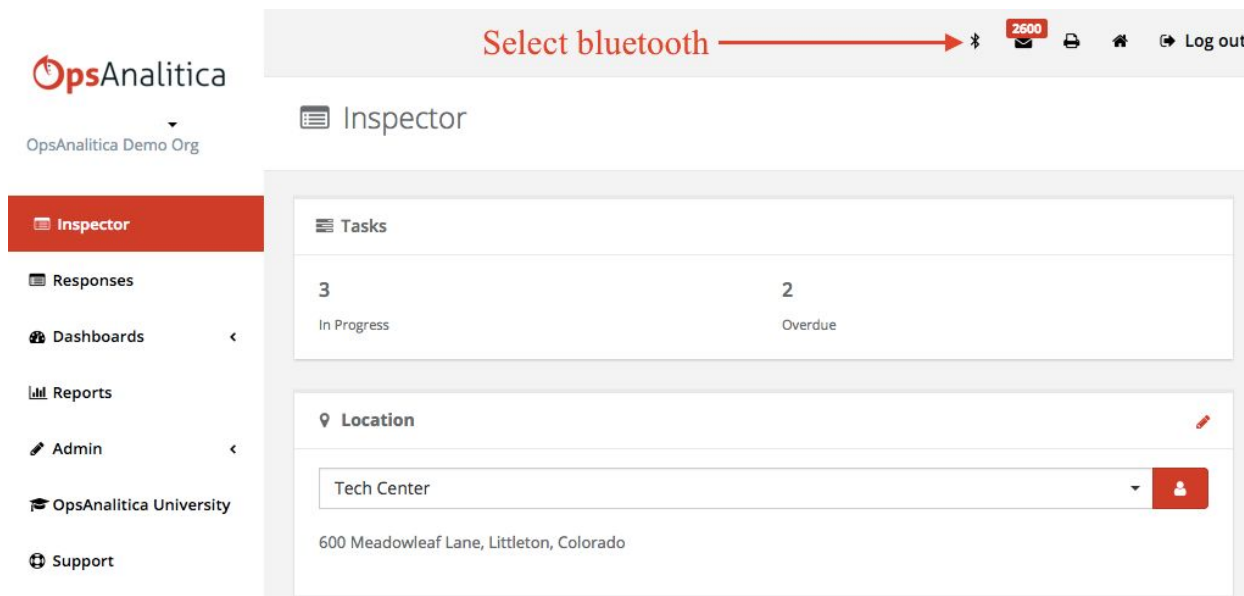
- 8. Do not **Submit** a checklist if it is uncomplete and you are switching between devices. Hit the **Home** button to exit and continue the checklist on another device.



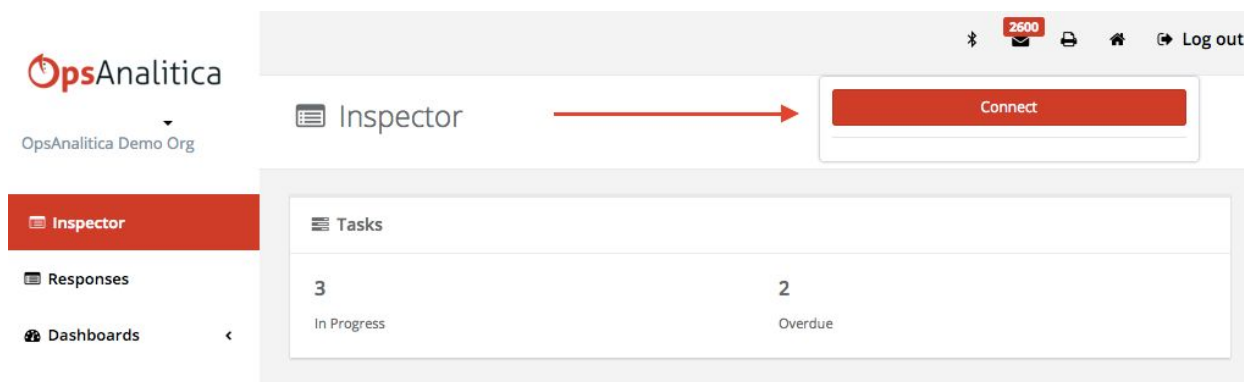
How to Use BlueTooth Thermometer With App

How to connect and use a Thermoworks Bluetooth Thermometer with the app. (Note: If you are on Android, you can use it within the Android app and if using IOS, you will need the native IOS app to connect to the bluetooth.)

1. Connect the Thermometer to the app by selecting the bluetooth button in the upper-right hand corner.



2. Select the **Connect** button.



3. A list of nearby bluetooth device will appear.
4. Select **BlueTooth Thermometer**.
5. Select **Connect**.
6. You can go into question sets and put thermometer temperatures into answers.



Guided Setup

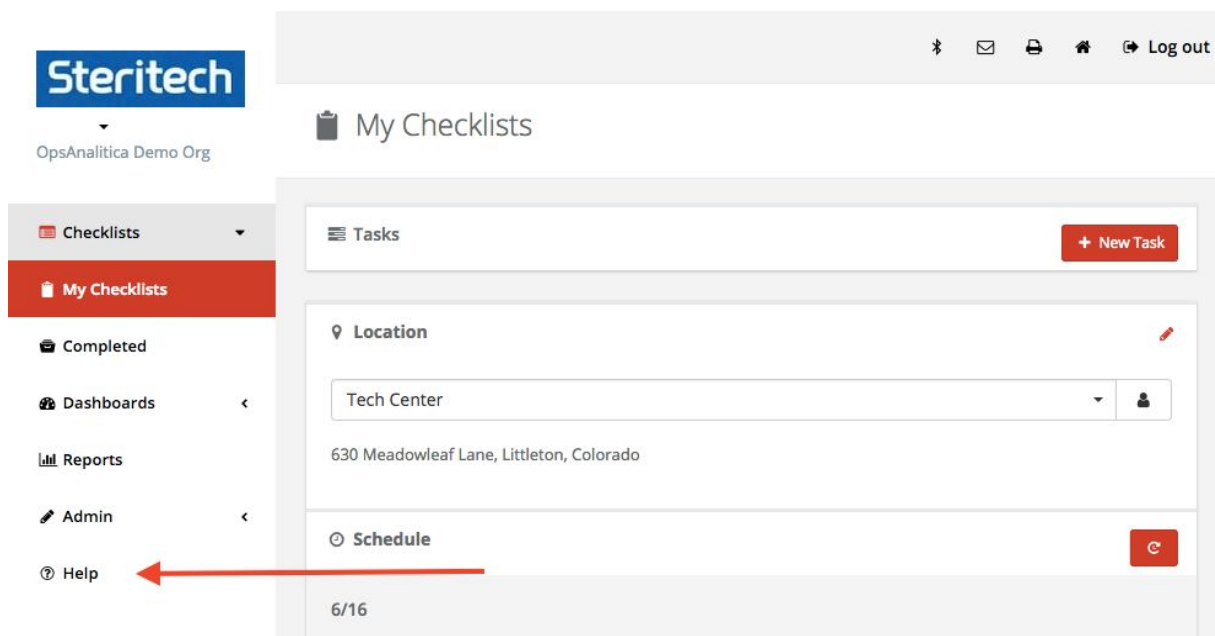
Intro

Overview of this step-by-step guide to setting up your platform.

1. Videos will only be 3-5 minutes long.
2. Some videos may have follow-up videos before beginning a task.
3. A lot of the training videos are for Multi-Unit Operators, not always Single-Unit Operators.

Help Resources Tour

1. Open the OpsAnalitica app.
2. Select the **Help** tab.



3. A variety of resources are provided to help you set up your platform.



Help

OpsAnalitica University

Watch step-by-step training videos, from new user training all the way through platform administration.

[Watch OpsAnalitica University >](#)

Support

Create a support ticket here, live chat with support techs, get your questions answered fast.

[Create a support request >](#)

Documentation

OpsAnalitica Platform documentation

[Read the docs >](#)

[API >](#)

4. The **OpsAnalitica University** offers step-by-step videos about everything in the platform. It is separated into five modules: New User - Getting Started, Guided Setup, Inspector Module, Asset Module, and Label Printing.

OpsAnalitica University

Watch step-by-step training videos, from new user training all the way through platform administration.

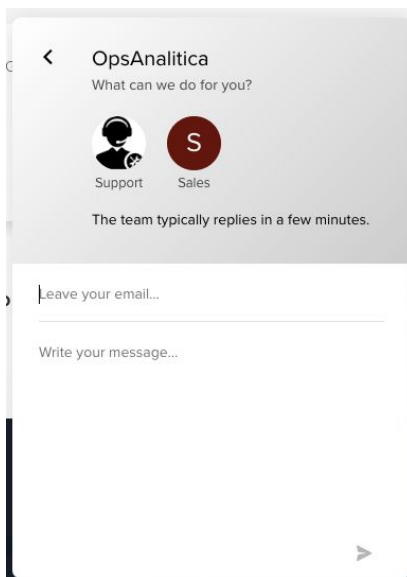
[Watch OpsAnalitica University >](#)

5. **Support** allows you to get into contact with a member of the OpsAnalitica team. It is also available in the OpsAnalitica University.


Support

Create a support ticket here, live chat with support techs, get your questions answered fast.

[Create a support request >](#)



6. **Documentation** is a pdf version of the OpsAnalitica University that is linked to different sections.



Documentation

OpsAnalitica Platform documentation

[Read the docs >](#)

[API >](#)

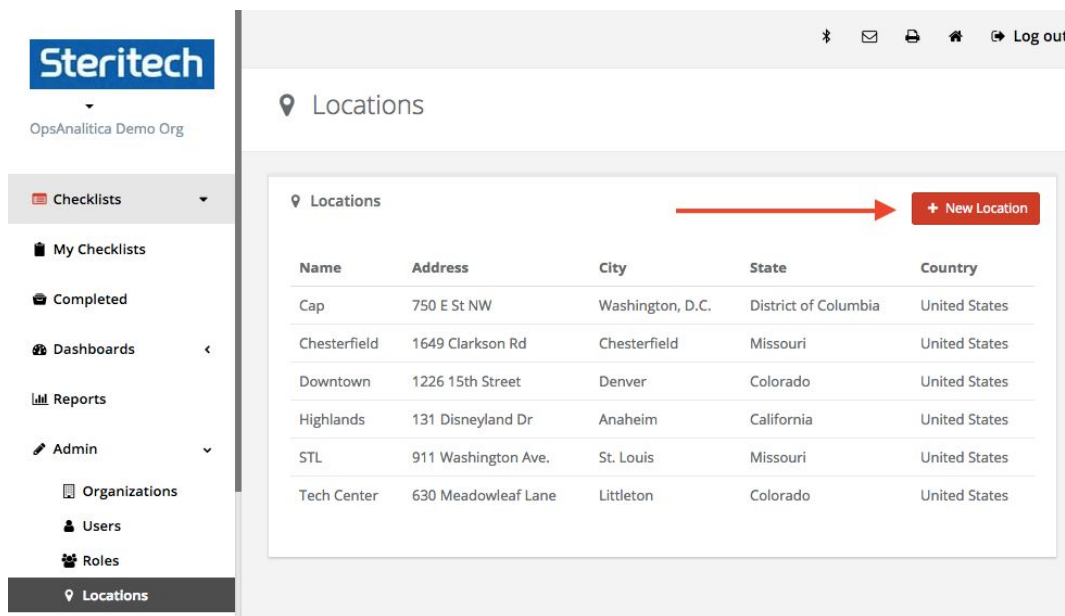




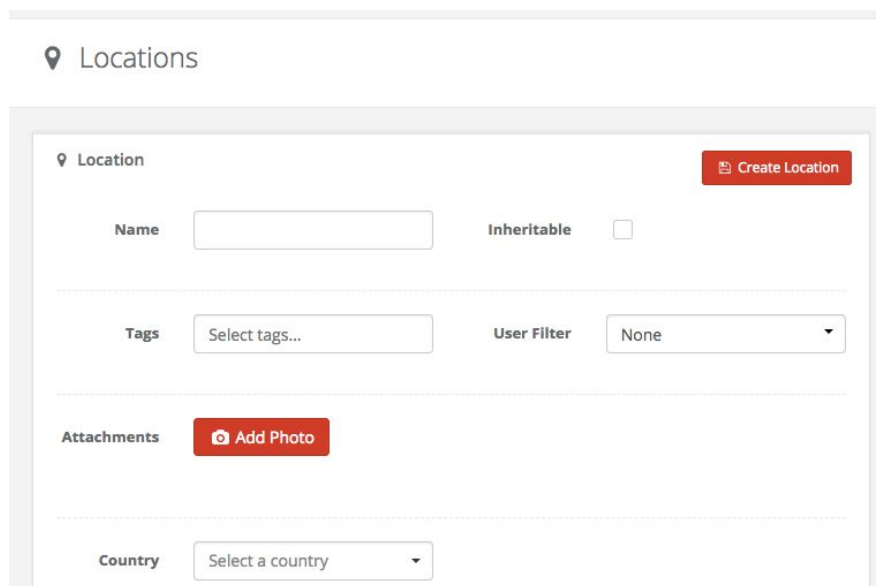
New Location 1 of 2

Watch this video along with “Location Tags 2 of 2” to learn how to add locations to your portal.

1. Open the OpsAnalitica app.
2. Select **Admin** in the left side dashboard.
3. Select **Locations**.
4. Select **+New Location**.



5. Next, follow these steps to set a new location.





6. Input a **Name** for the location.

Name

7. Fill out the basic locations data.

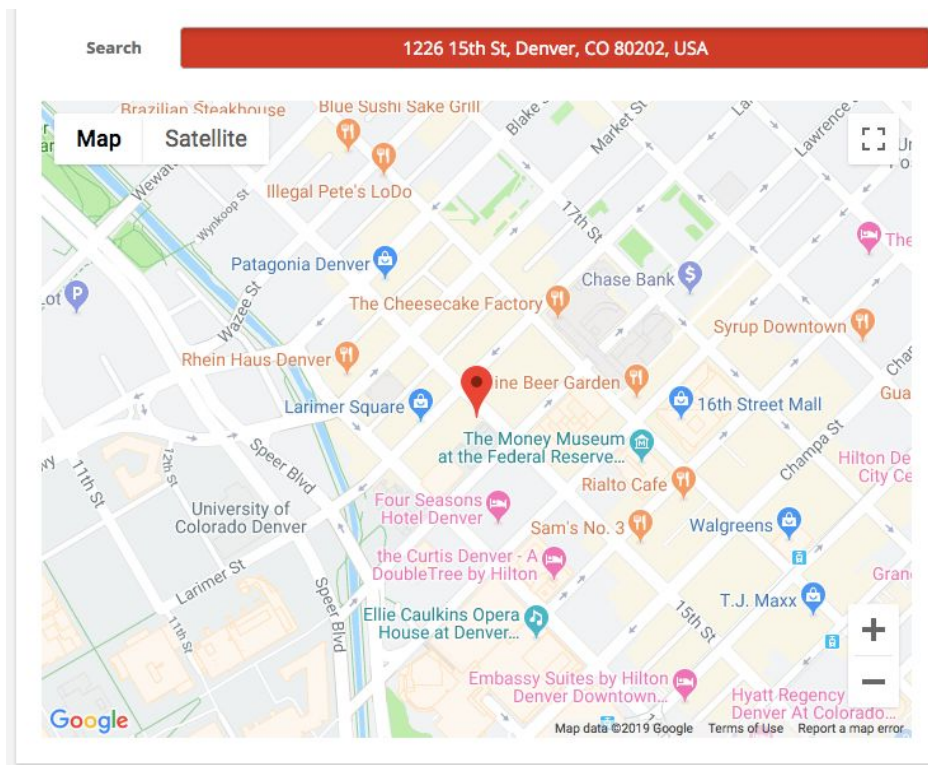
Country

Address

State **City**

Zip Code

8. The address will load onto Google Maps. You can drag the pin around to make it more exact.



9. Select **Create Location** when you are done.

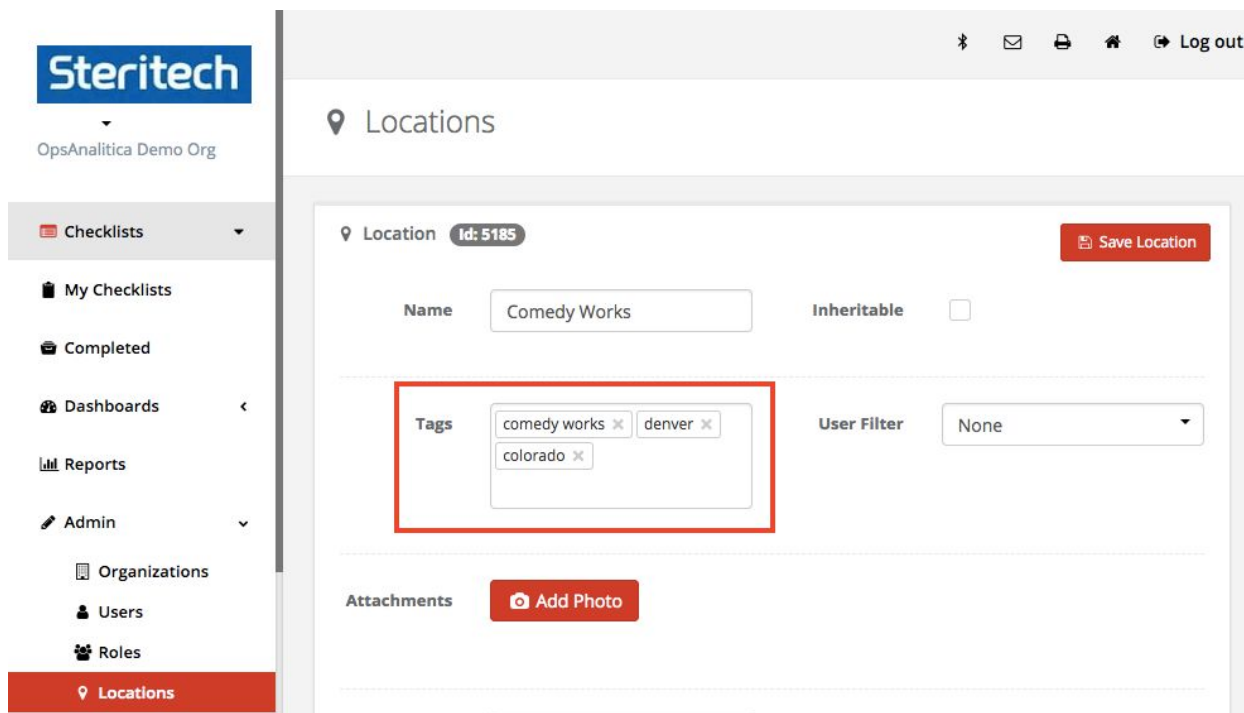




Locations Tags 2 of 2

Single-Unit Operators can skip this video since they only have one location.

1. Open the OpsAnalitica app.
2. Select **Admin** in the left side dashboard.
3. Select **Locations**.
4. Always tag a location with its name. You can add more tags on to build out a hierarchy.



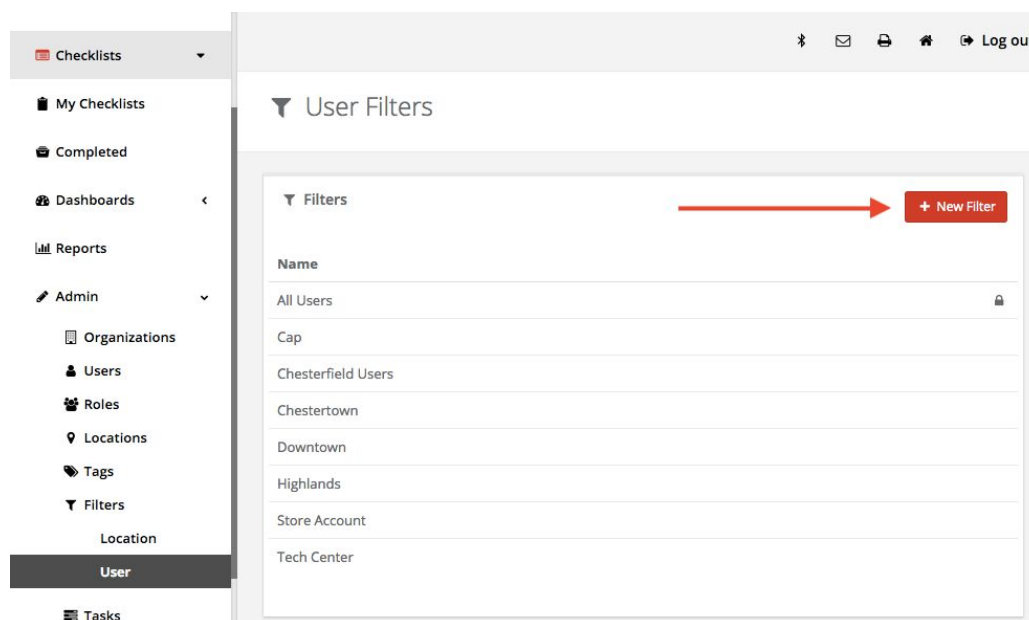
5. Two tags must always be on any location:
 - Location's Name
 - All Locations



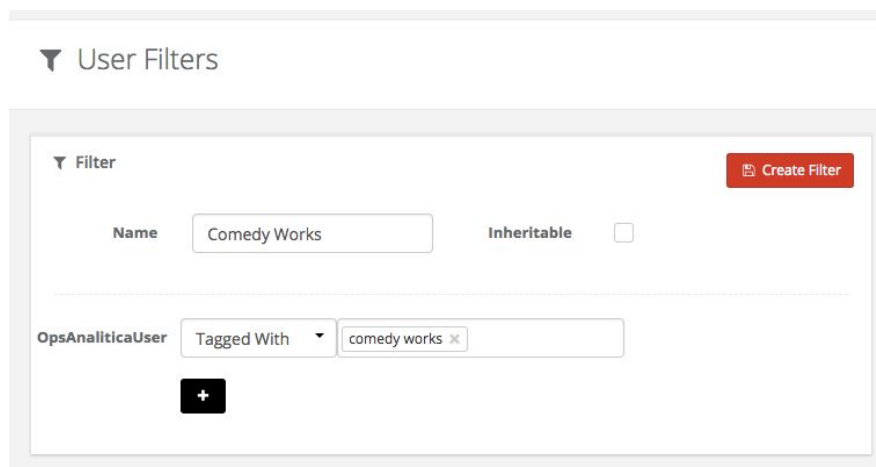
User Filters - Creating & Assigning

User Filters are about assigning people to locations; Single-Unit Operators can skip this video.

1. Open the OpsAnalitica app.
2. Select **Admin** in the left side dashboard.
3. Select **Locations**.
4. Under **Filters**, select **User**.
5. Select **+New Filter**.

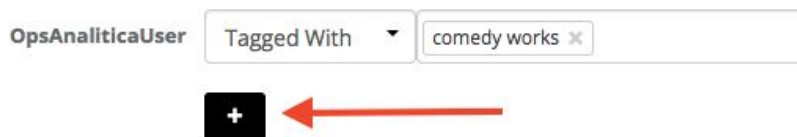


6. **Name** the User Filter the same as the Location it is being set to.
7. Select the filters tag. (The User Filter only allows you to select tags that have already been created.)

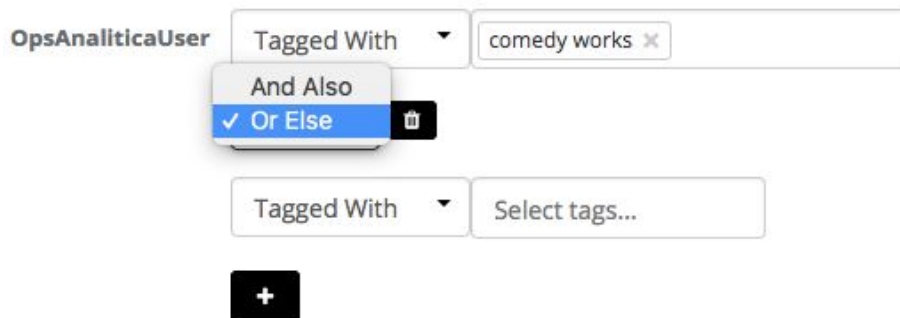




8. To build upon the tag, select the black plus sign.



9. You will get two options: **And Also** and **Or Else**



10. Tagging a location with **And Also** connects two locations such as Comedy Works and Denver so that in order to see the former, the latter would need to be tag. Generally, we recommend selecting the **Or Else** option.

11. Once you have added all your tags, select **Create Filter**.



Filter Create Filter

Name **Inheritable**

OpsAnaliticaUser

Tagged With

Or Else

Tagged With

Or Else

Tagged With

Or Else

Tagged With

Or Else

Tagged With

12. Now, going back to your original location, you can select the User Filter your created. This links the location to that specific User Filter.



📍 Locations

📍 Location **Id: 5185** Save Location

Name **Inheritable**

Tags

User Filter

- None
- Cap
- Chesterfield Users
- Chestertown
- Comedy Works
- Downtown
- Highlands
- Store Account
- Tech Center



Preloaded Checklist Overview

A quick explanation of the Preloaded Checklist.

1. Open the OpsAnalitica app.
2. Select **Admin** in the left side dashboard.
3. Select **Question Sets**.
4. Six checklists have been preloaded into the OpsAnalitica platform to help you get a headstart and reference how to create checklists.
 - Full Restaurant Inspection
 - Line Check
 - Mgr Closing Checklist
 - Mgr Opening Checklist
 - Shift Log
 - Temperature Log

The screenshot shows the 'Question Sets' interface. At the top left is a menu icon and the text 'Question Sets'. At the top right is a red button with a plus sign and the text 'New Question Set'. Below this is a table with three columns: 'Title', 'Status', and 'Tags'. The table contains six rows of data, each representing a preloaded checklist. The 'Temperature Log' row is highlighted in grey.

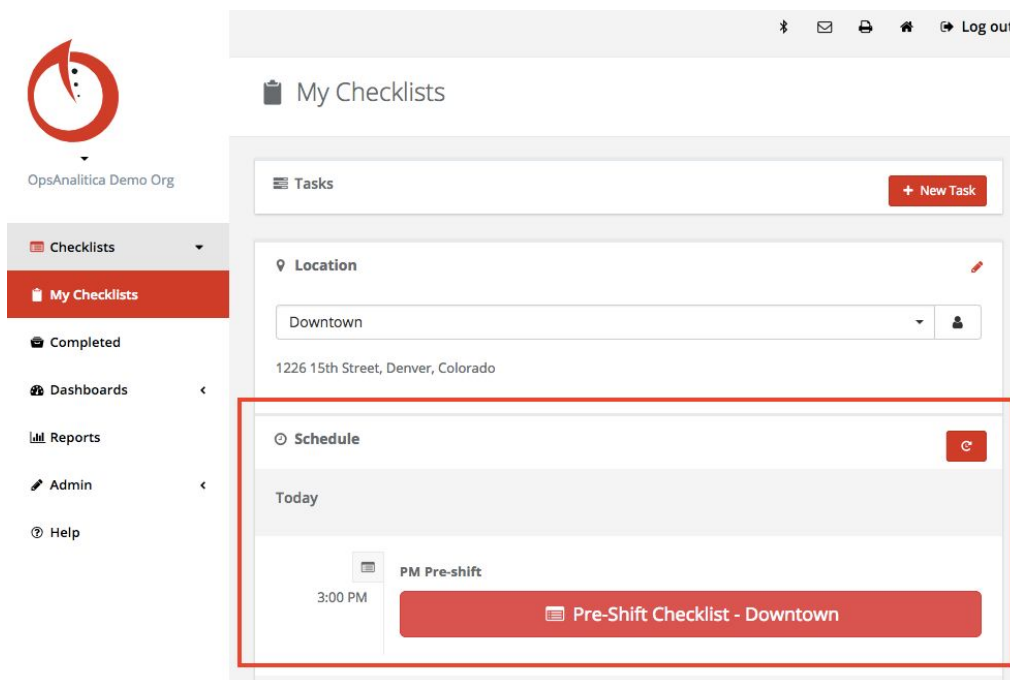
Title	Status	Tags
Full Restaurant Inspection	Active	
Line Check	Active	
Mgr Closing Checklist	Active	
Mgr Opening Checklist	Active	
Shift Log	Active	
Temperature Log	Active	

5. You can keep them **Active** or change them to **Inactive** and create your own.

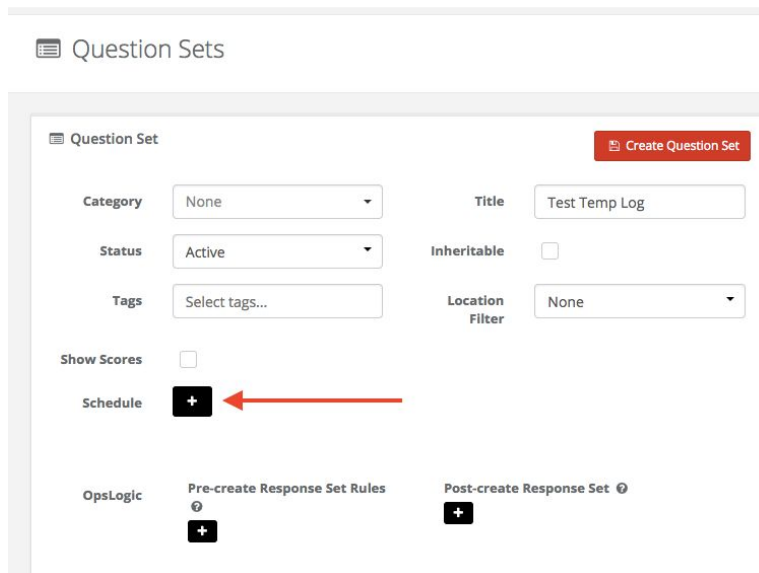


Schedule Question Sets

1. Open the OpsAnalitica app.
2. Selecting **My Checklists** in the left hand dashboard allows you to see all the checklists scheduled each day for a specific location.



3. In order to schedule a questions set, select **Question Sets** from the dashboard.
4. Select the plus sign to create a **Schedule**. To add more times a day, select the plus sign.





5. Input a **Name** and skip **Location Filter** until you have watched “Creating and Applying Location Filters.” Multiple schedules can apply to one checklist.
6. The **State On** date and time are always defaulted to when you create the schedule.

Form fields shown in the screenshot:

- Show Scores:
- Schedule:
- Name:
- Location Filter:
- Start On: 2019-06-25
- Repeat Every: 1 Day
- From: 12:00 AM
- To: 01:00 AM
- Allow Late For: 24:00:00

7. Choose how often you would like the checklist to appear: Day, Week, Month, Quarter, or Year.

Repeat Every: 1

From: 12:00 AM

To: 01:00 AM

Repeat Every options: Day, Week, Month, Quarter, Year

8. Next, input the **From** time and the **To** time. Checklists only become available at the **From** time and are due at the **To** time.

From: 12:00 AM

To: 01:00 AM

9. **Allow Late For** is an optional setting that allows you to start the checklists late. This comes into play for checklists that may not have been done on time for a variety of reasons but should still be done on a certain day.



Allow Late For

10. Once you are done creating a schedule, select **Save Question Set**.

Question Set **Id: 550**

Delete

Save Question Set

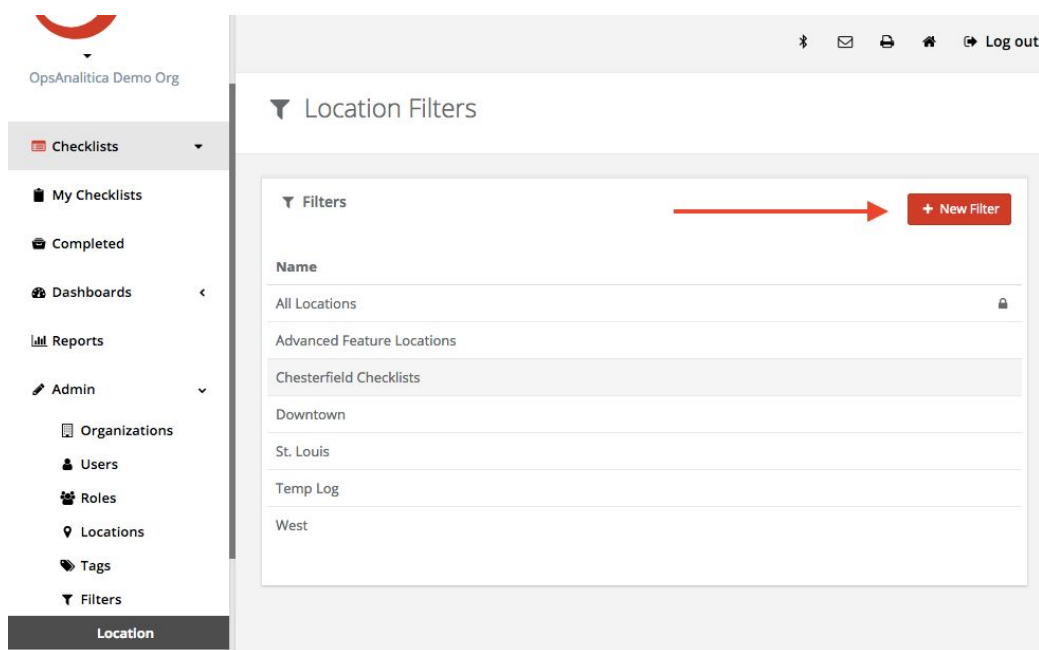
11. Now the question set will appear on your **My Checklists** whenever it is set to.



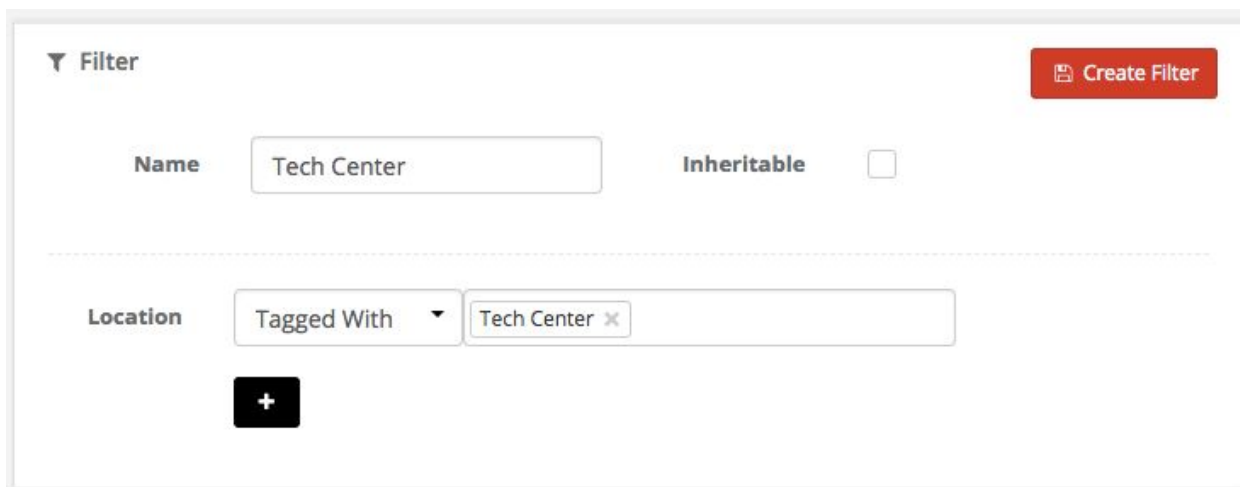
Creating and Applying Location Filters

Locations filters are used to assign a checklist to a restaurant. Single-Unit Operators can skip this video.

1. Open the OpsAnalitica app.
2. In order to apply a location filter, you must first create one. State by selecting **Admin** in the left side dashboard.
3. Select **Filter**, then **Locations**.
4. Select **+New Filter**.

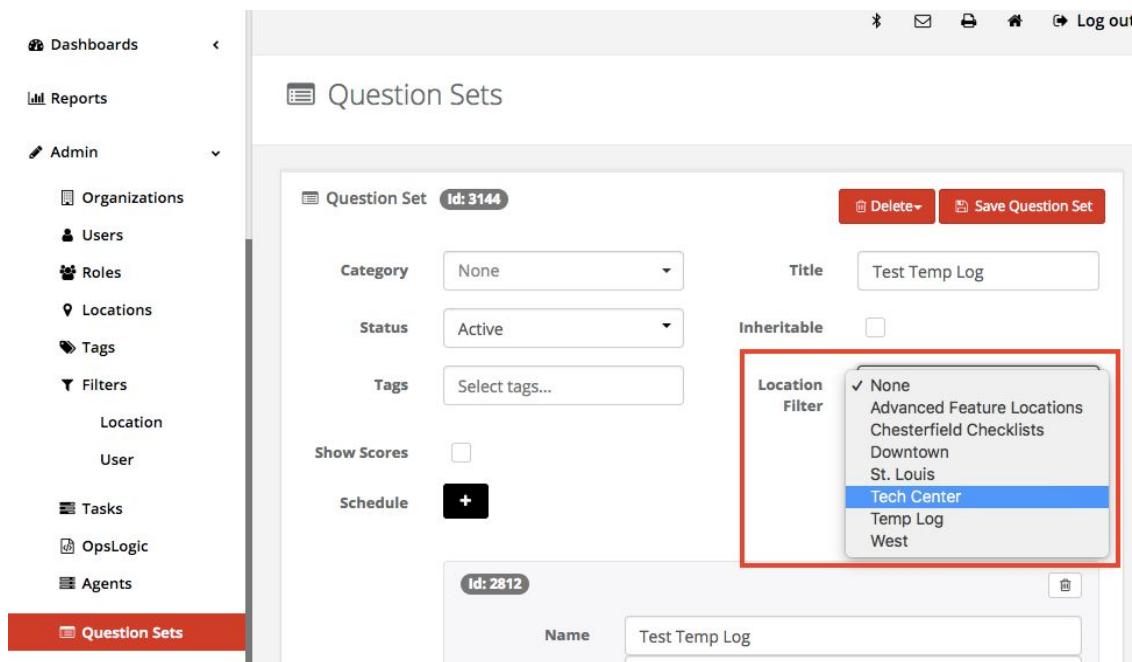


5. Input the **Name** and the **Tags** to a specific location (e.g. Tech Center).

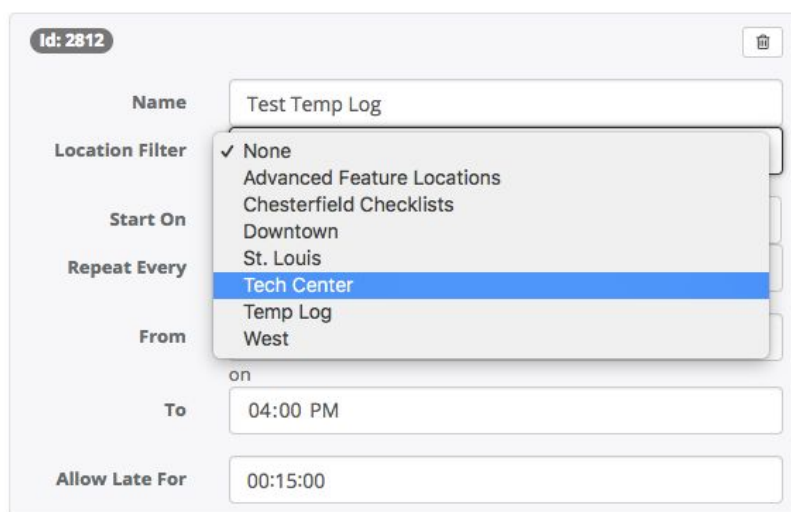




6. Select **Create Filter**.
7. Next, in the left dashboard, select **Question Sets** and select one (e.g. Test Temp Log).
8. If one checklist only applies to one location, then you would select the location from the top **Location Filter** dropdown menu.



9. If you want a checklist to apply to a certain location, only at a certain time, scroll down to the **Schedule** and select the **Location Filter**.





10. When a location filter is assigned to a restaurant, the restaurant becomes the only restaurant that can see the checklist. A checklist that does not have any location filters can be seen by all restaurants.

Tags and Rules

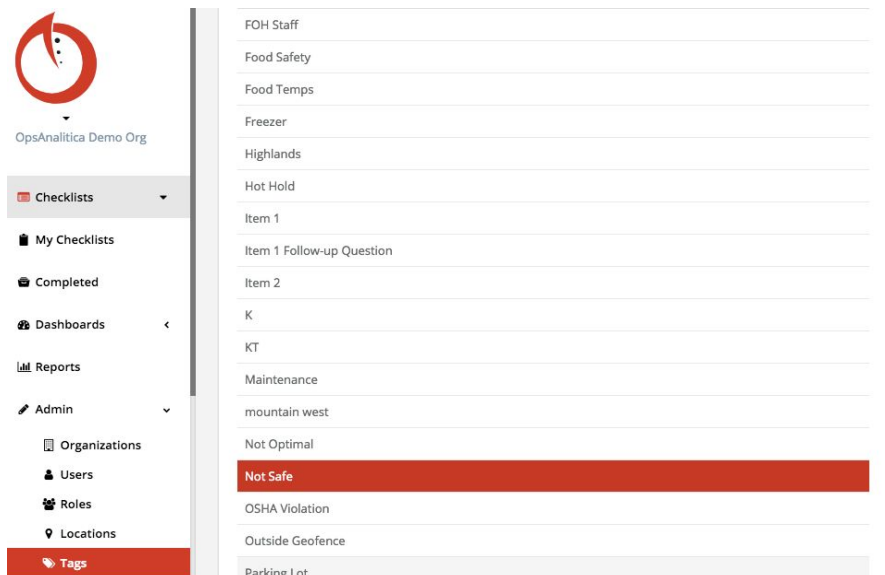
Overview of tags and the OpsLogic Engine.

Tags

1. Open the OpsAnalitica app.
2. Select **Admin** in the left side dashboard.
3. Select **Tags**.
4. You can create tags by selecting **+New Tag**. Then you may input a **Name**, designate and background and text color, and also select whether is it **Inheritable**.

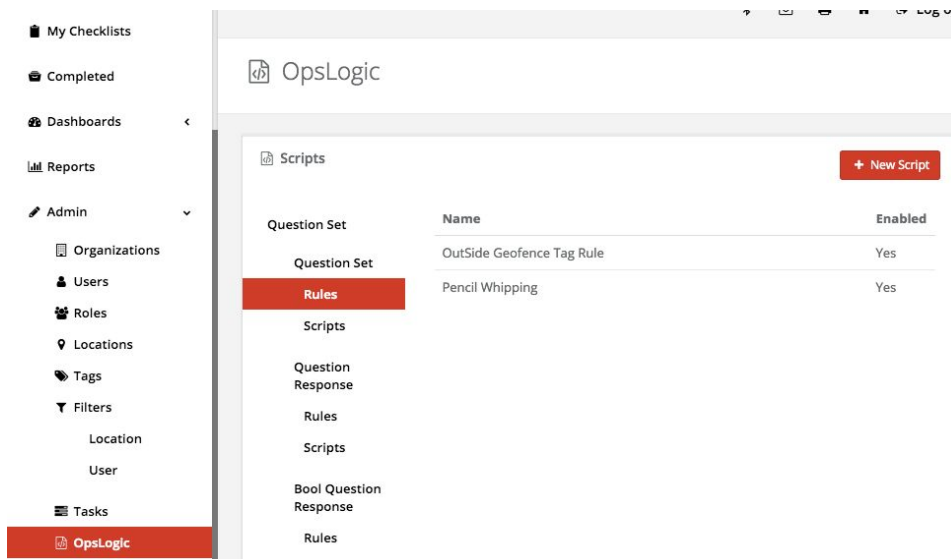
The screenshot displays the 'Tags' management interface. At the top, there is a 'Tags' header with a tag icon. Below it, a 'Tag' form is shown. The form includes a 'Name' field with the value 'Not Safe', an 'Inheritable' checkbox that is checked, a 'Background' color picker with the value '#de2323', and a 'Foreground' color picker with the value '#050505'. A red 'Create Tag' button is located in the top right corner of the form.

5. Select **Create Tag**.
6. Now the tag will appear under **Tags**.



Rules

1. Select **Admin** in the left side dashboard.
2. Select **OpsLogic**.
3. You can choose to alter **Rules** under Question Sets for each kind of question.



4. Rules are preset using an advanced code, but available for you to change once you become more familiar with the platform.



Scripts

Script

Delete Script Save Script

Name: GeoFence 500 Ft Rule Inheritable:

Enabled:

```
1 //152.4 meters is = to 500 feet. This rule will tag any question with an Outside Geofence Tag Rule.
2 // This rule needs to be used with the Outside Geofence Tag Rule.
3 const maxMeters = 152.4
4
5
6 [if This.QuestionResponseSet.Location.Geo != Null AndAlso This.Response.Geo != Null AndAlso This.Response.Tags.Add("Outside Geofence")
7   This.Response.Tags.Add("Outside Geofence")
8 end if
9
10 return This.Pass()
```

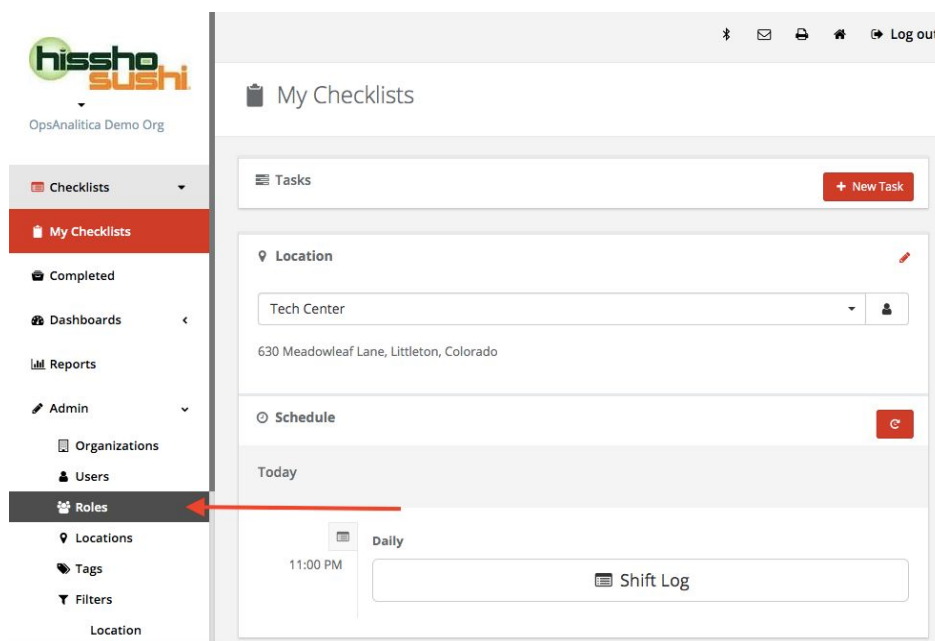
5. We suggest reaching out to the OpsAnalitica Team for support if you would like to create and save rules.



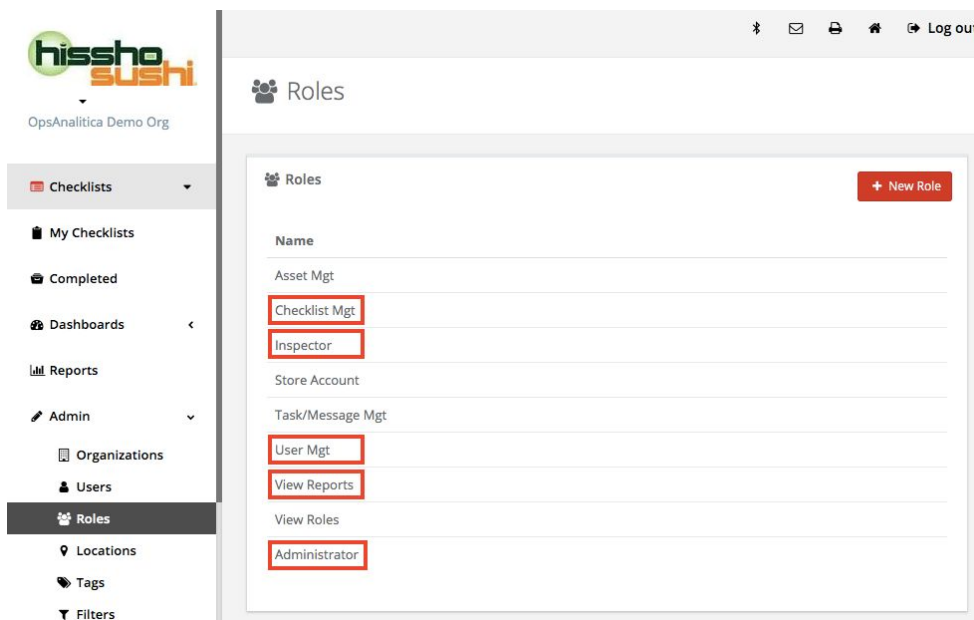
Roles

A guided overview video on all the roles available on the platform; see the Inspector Module for more.

1. Select **Admin** in the left side dashboard.
2. Select **Roles**.



3. The platform is preloaded with five different roles: Checklist Mgt, Inspector, User Mgt, View Reports, and Administrator.



Administrator Role

Allows you to do anything in the system. This role should only be given with caution. Only an administrator can give another person the administrator role.

Inspector Role

Allows you to conduct checklists and gives employees the proper permissions to access the portal.

Checklist Management Role

Allows an individual to create and edit checklists.

User Management Role

Allows an individual to create and edit users. (Examples of people who could be placed in this role include chefs, kitchen managers, and people hiring employees.)

View Reports Role

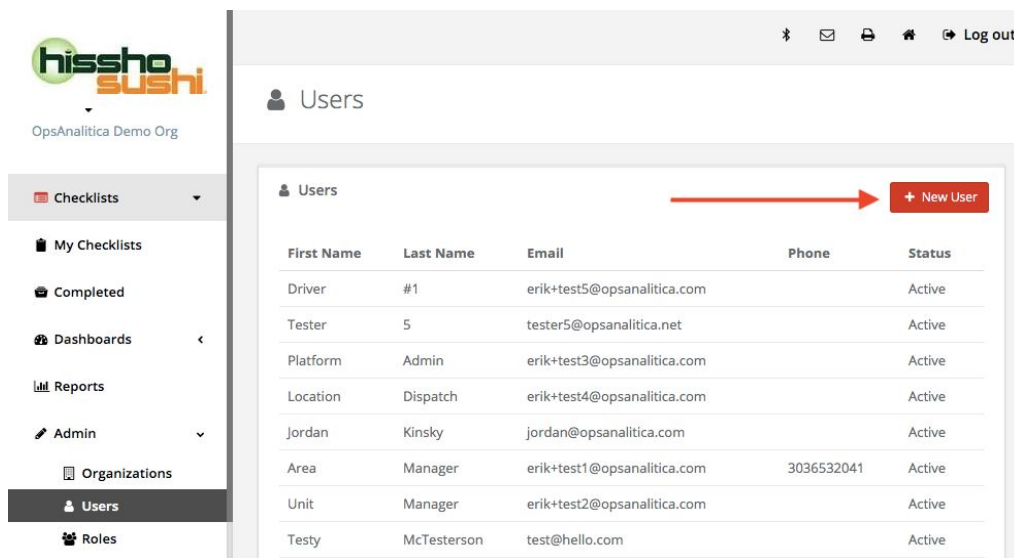
Allows access to dashboards and reports menu.



Creating a New User (1 of 2)

This video is meant to be watched before the “Tags and Notifications (2 of 2)” video. It reviews creating a new user and assigning them roles.

1. Open the OpsAnalitica app.
2. Select **Admin** in the left side dashboard.
3. Select **Users** from the drop down menu, followed by **+New User**.



4. Input all the necessary information, including a **Title, Name, Email, and Mobile Number** (optional).
 - An email address, whether it is personal or company created, is necessarily to login to the portal.

User Create User

Title **Status**

First Name **Last Name**

Email **Mobile**



5. The **Generate Password** box is checked by default. Once the user is created, they will receive an email directing them to set a password.

A screenshot of a form field labeled "Generate Password" with a red checkmark in a small square box to its right.

6. However, you may also create a password by unselecting the **Generate Password** box.

A screenshot of a form showing the "Generate Password" checkbox unchecked. Below it are two input fields labeled "Password" and "Confirm Password".

7. Next, in order for an employee to have access to the portal, they must be assigned a **Role**. All employees must at least have the **Inspector** role in order to access the portal. General employees have the **Inspector** and **View Reports** roles assigned to them.

- Roles**
- Asset Mgt
 - Checklist Mgt
 - Inspector
 - Store Account
 - Task/Message Mgt
 - User Mgt
 - View Reports
 - View Roles
 - Administrator

8. Once all steps are complete, select **Create User**.

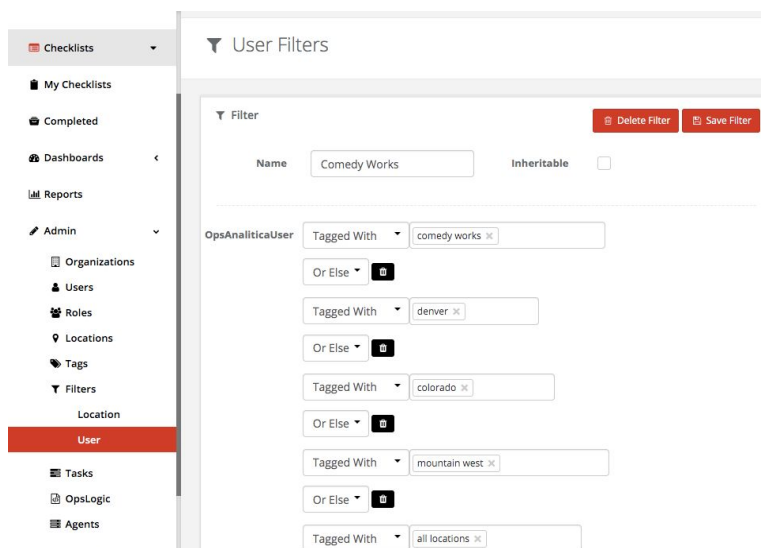
A screenshot of a form showing a "User" label with a person icon and a red "Create User" button with a document icon.



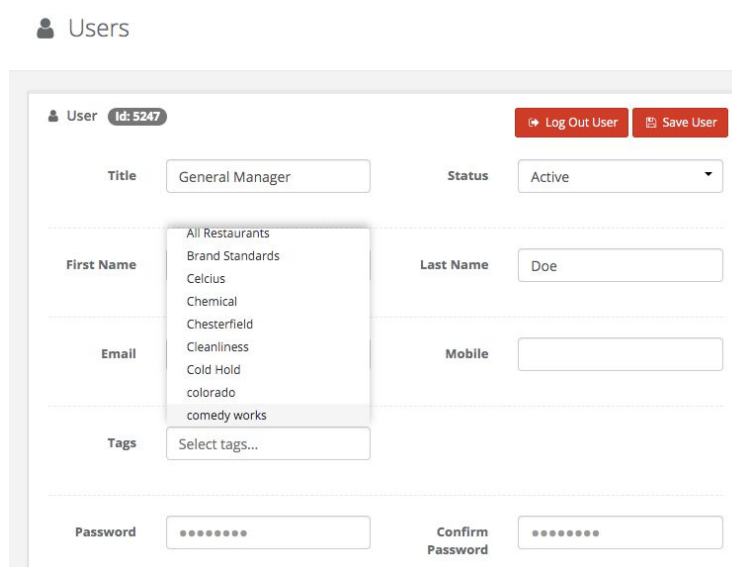
Tags and Notifications (2 of 2)

Overview on tagging users and how notifications work for each user.

1. Open the OpsAnalitica app.
2. Select **Admin** in the left side dashboard.
3. Tags are based upon locations such as
4. Tags can be applied after User Filters are set up and allow them to be accessible to certain roles and locations.

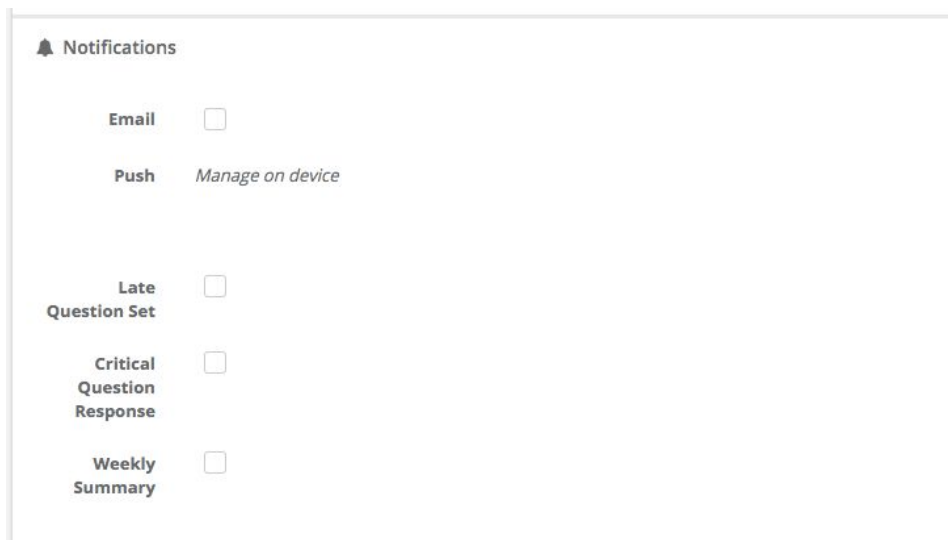


5. To apply a tag to a user, the tag must be first active. Then, it is simply a matter of selecting the tag when creating or editing a user.

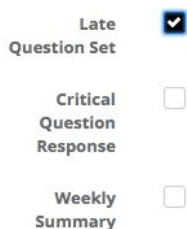




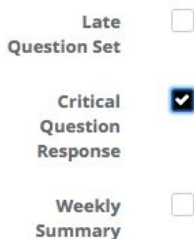
6. There are a few options for notifications. (In-system notifications go to your inbox in the portal and push-notifications can be set up from your device.)



7. **Late Question Set** notifications go off after checklist has not been done at its scheduled time.



8. **Critical Question Violation Response** comes from the critical tag and sends a notification.



9. **Weekly Summary** notification is a compliance summary.



Late
Question Set

Critical
Question
Response

Weekly
Summary



Conclusion

Congratulations!

After finishing this **Guided Set-Up Module**, you should have a functioning platform that can be used in your restaurants. Now, what's next?

We suggest rolling out your platform in small phases. Start with putting a few Checklists at a time (2-3) into the system and scheduling them in your restaurants. Get those checklists done on time and then continue!

Need more help? Continue on through the document for more in-depth reviews of setting things up or visit the OpsAnalitica University.

Good luck!

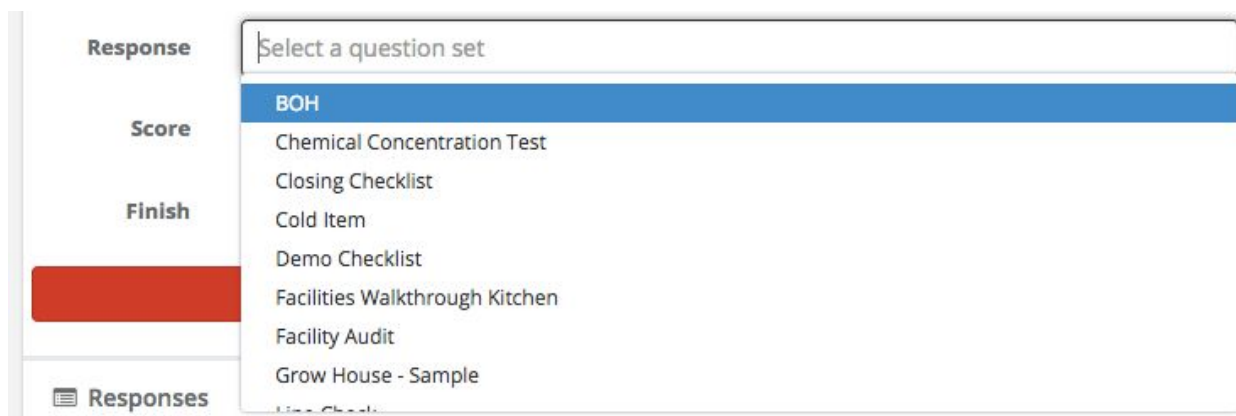


Inspector Module

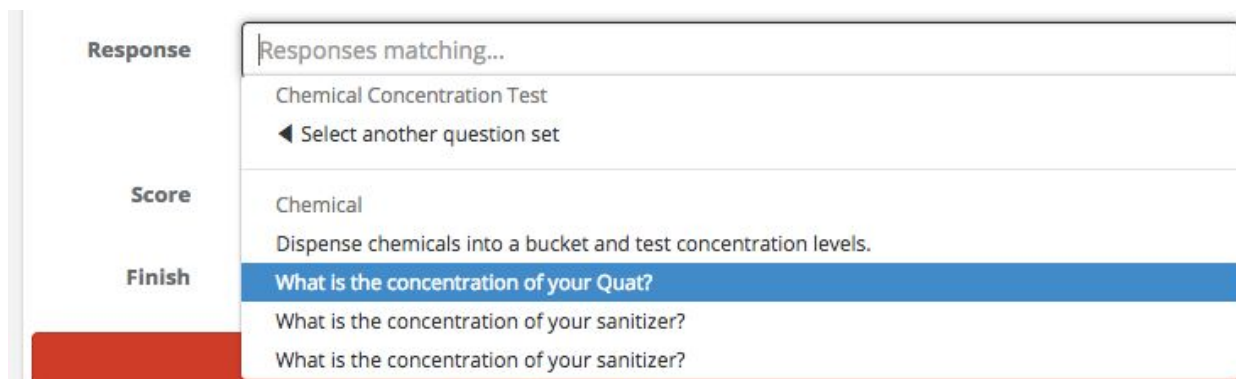
| Response Filter |

Allows you to filter all the checklists by the answers to a checklist question.

1. Open the OpsAnalitica app.
2. Select **Responses** in the left side dashboard.
3. Select a question set (such as Chemical Concentration Test).



4. Select a specific question to filter the responses by.



5. Depending on the question, you can select between true or false and a range of answers.
6. Select **Filter**.
7. The response filter can be found in the **Responses** section and also in the **Question Sets by Location** report.

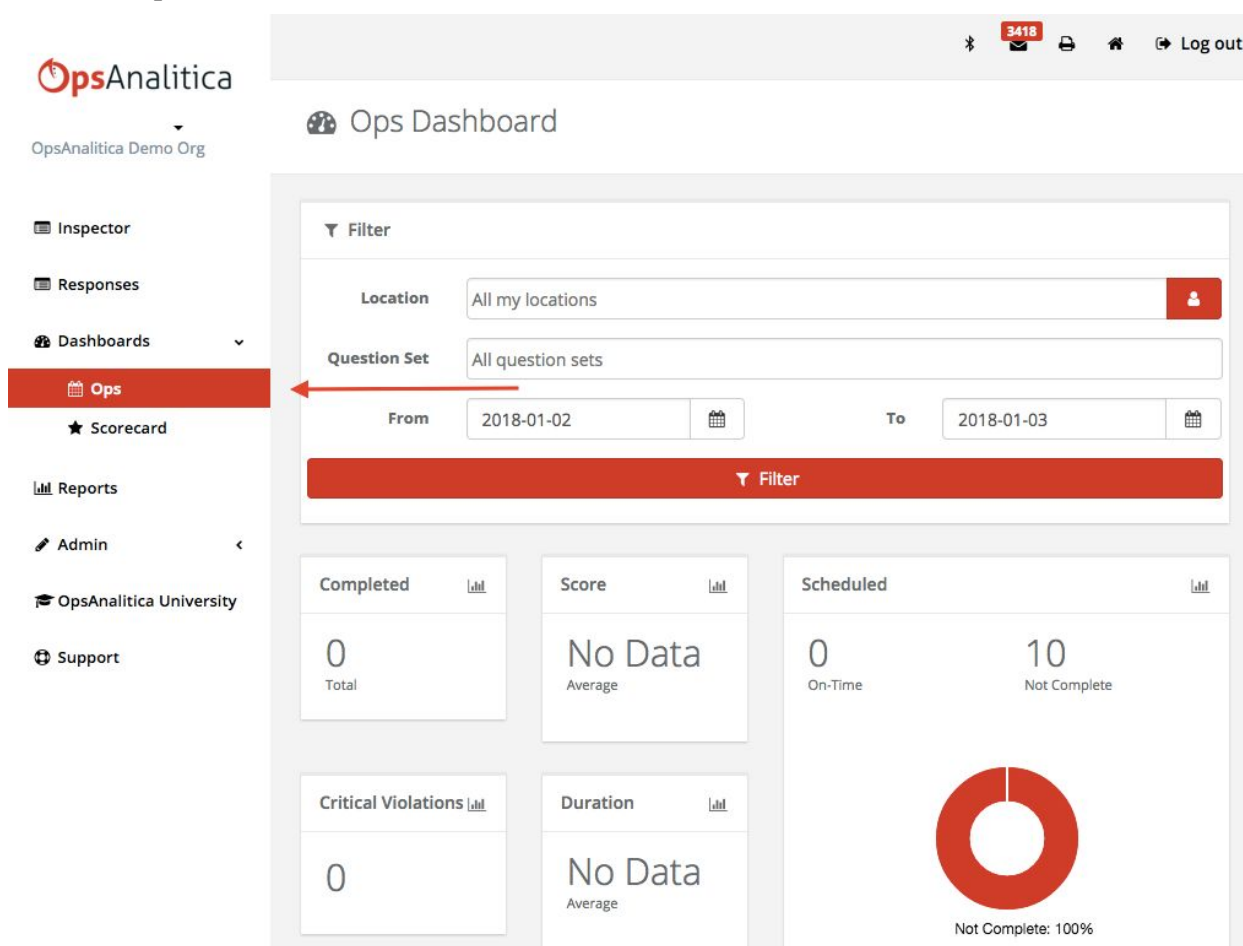


| Dashboards |

Ops

Designed for the user to view all pertinent operations statistics that are happening each day.

1. Open the OpsAnalitica app.
2. In the left dashboard, select **Dashboards**.
3. Select **Ops**.

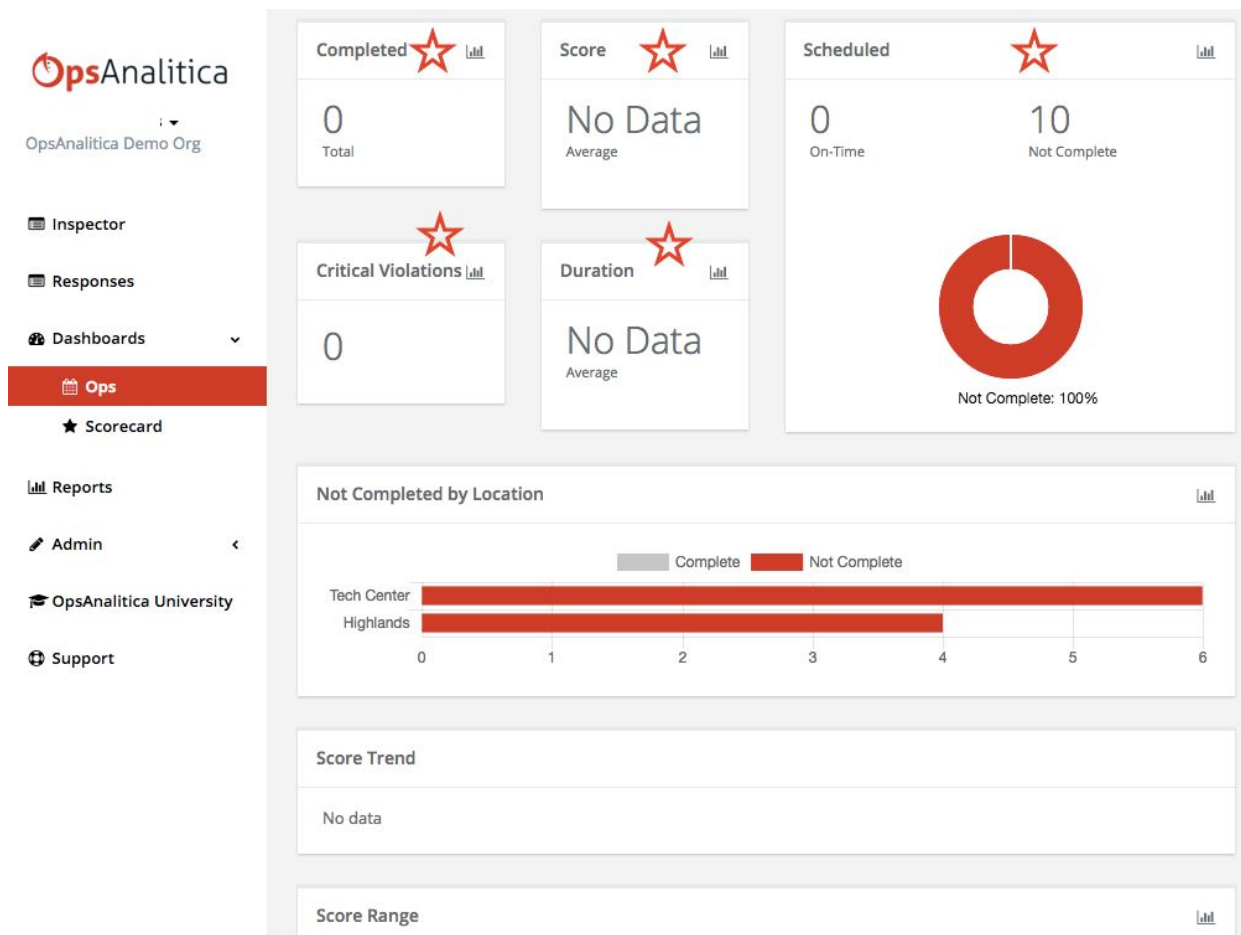


4. The **Ops Dashboard** is pre-filtered to all your restaurant locations. By selecting, **Completed, Score, Critical Violations, Duration, or Scheduled**, you can view individual reports.
 - Completed = Checklists that have been submitted into the system
 - Score = The average score
 - Duration = Average time it took to complete the checklists
 - Critical Violations = A summary of all the critical violations from your restaurants



OpsAnalitica Version 2.0 App Manual

- Schedules = All checklists separated into Not Complete and On-Time.





Scorecard

A way to look at a person, checklist, location, or any combination of all three and compare to the whole company (the chain).

1. Open the OpsAnalitica app.
2. In the left dashboard, select **Dashboards**.
3. Select **Scoreboard**.

The screenshot displays the OpsAnalitica Scorecard Dashboard. The left sidebar contains navigation items: Inspector, Responses, Dashboards (selected), Ops, Reports, Admin, OpsAnalitica University, and Support. The main area is titled 'Scorecard Dashboard' and includes a 'Filter' section with dropdowns for 'User' (All users), 'Location' (All my locations), and 'Question Set' (All question sets). Below these are 'From' and 'To' date pickers. A red bar with a 'Filter' button is located below the date pickers. The dashboard shows two rows of metrics: 'All' and 'Filtered'. The 'All' row displays 'Completed' (481 Total), 'Score' (75.56% Average, Min: 0.00% - Max: 100.00%), and 'Duration' (06:56:47 Average, Min: 00:00:00 - Max: 17.23:03). The 'Filtered' row shows the same categories but with a 'Filtered' label in the first column.

4. User filter automatically sets when the page loads.
5. **All** refers to everytime the line-check tech center has been completed.



OpsAnalitica Scorecard Dashboard

OpsAnalitica Demo Org

- Inspector
- Responses
- Dashboards
- Ops
- Scorecard**
- Reports
- Admin
- OpsAnalitica University
- Support

Filter

User: All users

Location: All my locations

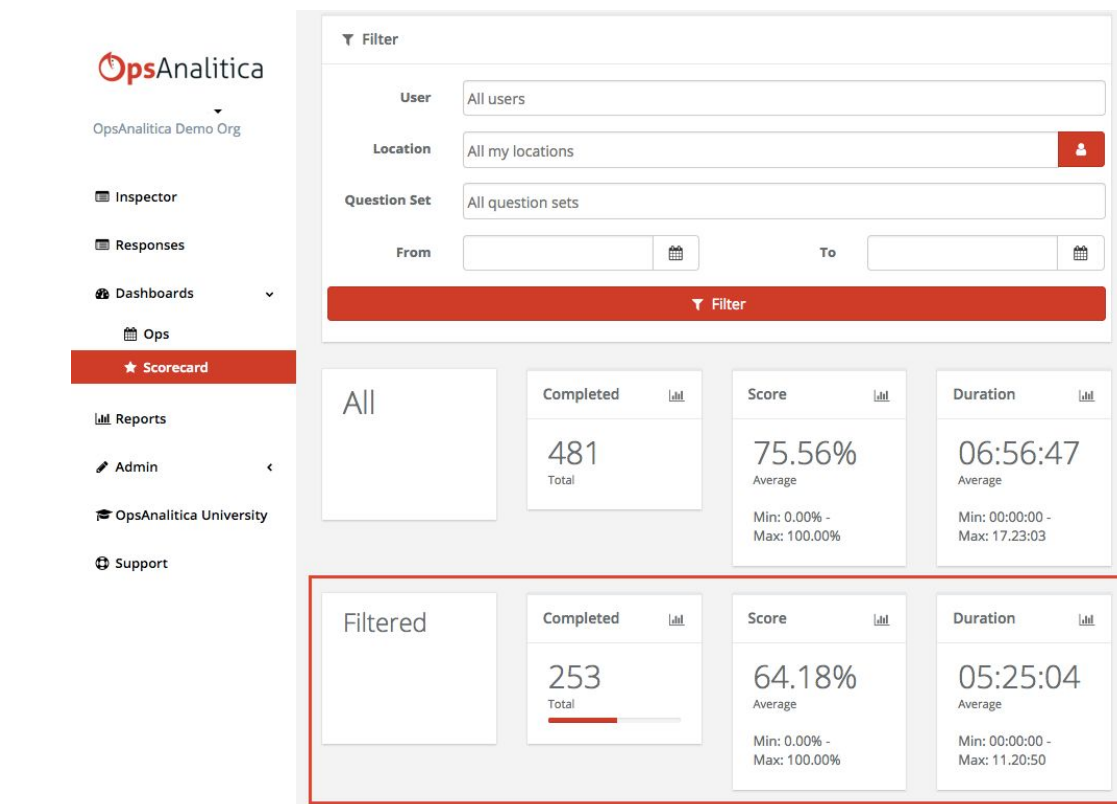
Question Set: All question sets

From: [] To: []

Filter

Category	Completed	Score	Duration
All	481 Total	75.56% Average Min: 0.00% - Max: 100.00%	06:56:47 Average Min: 00:00:00 - Max: 17:23:03
Filtered	250	66.100%	05:05:01

6. **Filtered** refers to how the tech center location did versus every time it has been done.

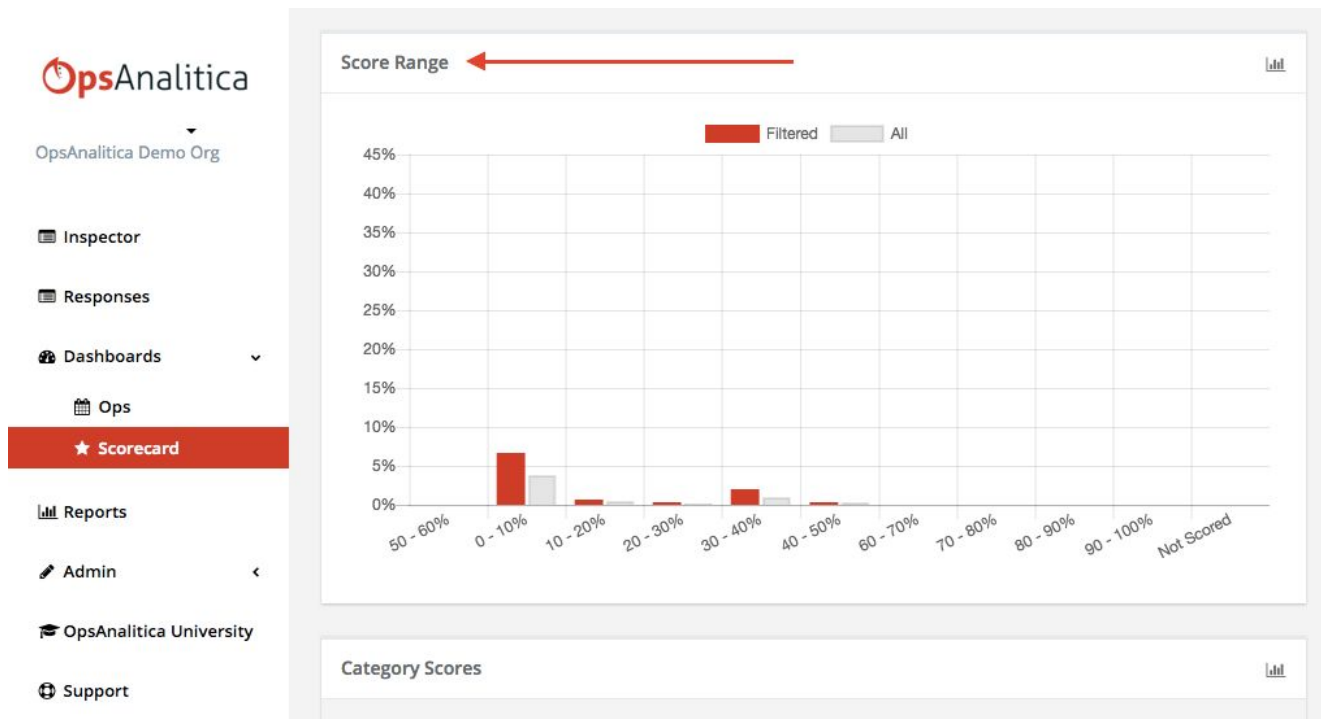


7. Score Trend - Your filter (in gray) versus the entire chain (in red).





8. **Score Range** - A different representation of how scores are grouped. By selecting the bars, it will take you to the report to show the individual inspections that make up the range.



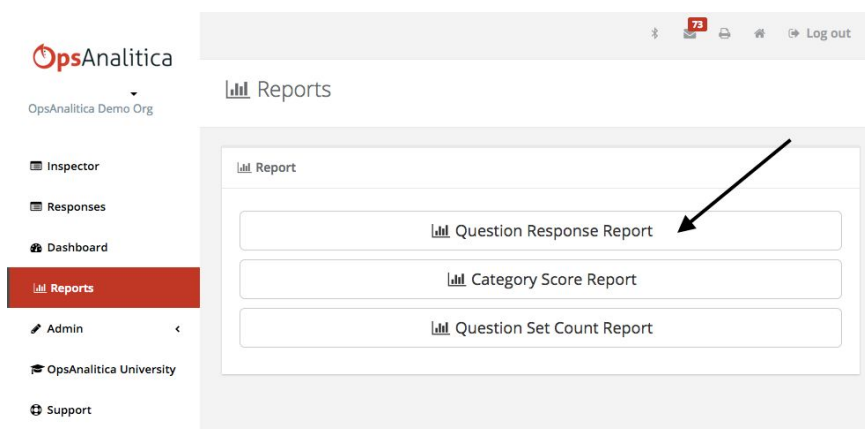


| Reporting |

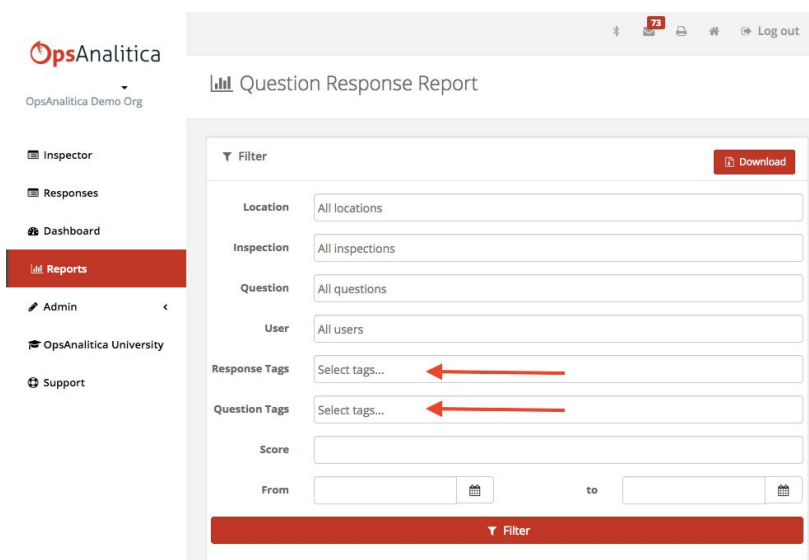
Question Response Report

The Questions Response Report is important because it allows you to look at all inspections from all locations and all users rather than just individual inspections. Applying filters is important because the Question Response Report groups everything together. You can filter by location, user, or specific inspections. This section of the manual focuses on Response Tags and Question Tags.

1. Begin by opening the OpsAnalitica app.
2. Select **Reports** in the left dashboard.
3. Select **Question Response Report**.

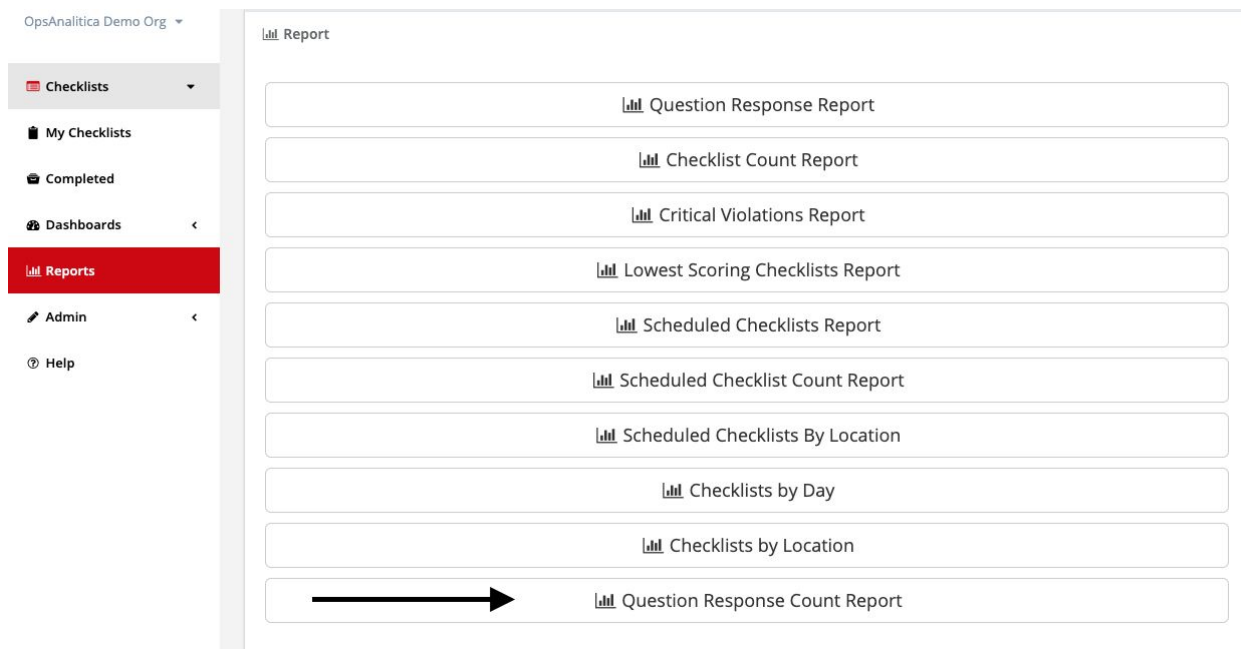


4. The screen in the image below will appear with a variety of filter options. However, we are going to focus on just Response Tags and Question Tags.





Question Response Count Report



1. Open the OpsAnalitica app.
2. In the left dashboard, select **Reports**.
3. Select **Question Response Count Report**.
4. You definitely need to filter this report.
 - a. The Between Date is required.
 - b. A common use case would be to count the amount of Unsatisfactory or Not Safe Response Tags. This would show you where you have your biggest issues in your chain.



Filter Download

Saved Filters ▼ × 📄 🗑️

Location 👤

User

Checklist

Checklist Tags

Question ▼

Question Tags

Response ▼

Response Tags Unsatisfactory Not Safe

Score **To**

Between 📅 **And** 📅

Filter

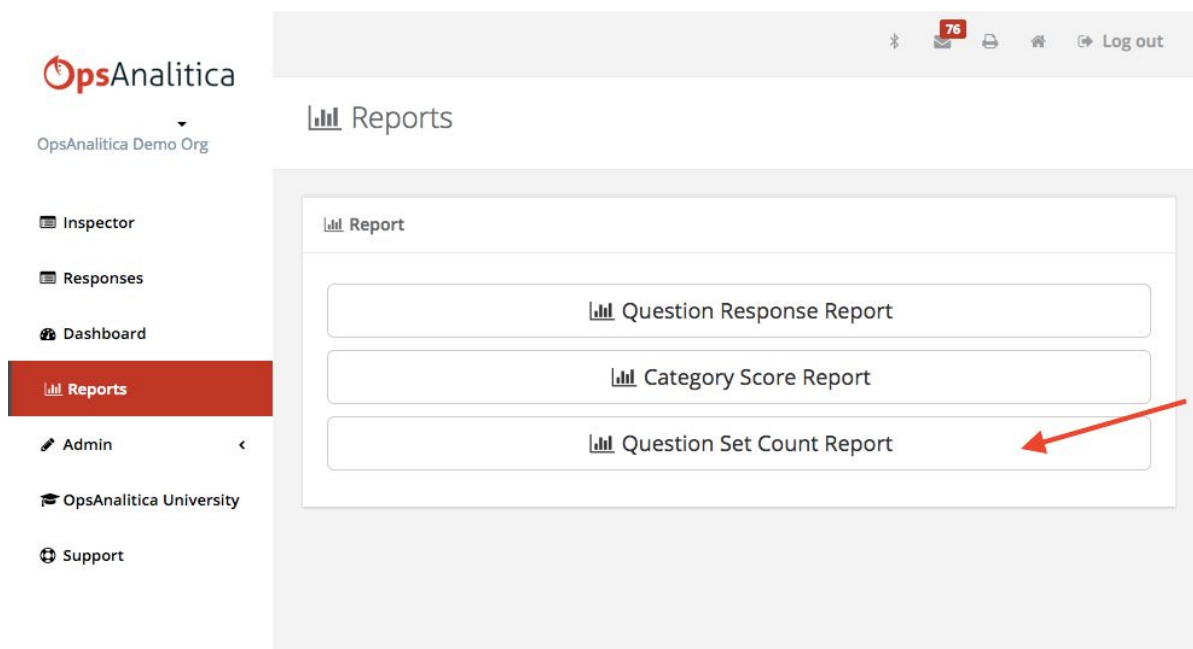
- As seen below, the report will be separated by **Checklist, Category, Question, and Total**. If you look at the first row of the report. It highlights that the question Temp Ranch Dressing has 75 instances of being Unsatisfactory and Not Safe.
- One thing to note is that because the Checklist filter was left blank that this report is looking across all checklists.

Checklist	Category	Question	Total
Line Check	Temperatures	Temp Ranch Dressing	75
Line Check	Cooler	What is the temperature of the Ranch Dressing?	17
Line Check	Cooler	All cold hold food products were kept below 41 degrees.	14
Temp Log	Cooler	What is the temperature of Reach In 1?	8
Temp Log	Cooler	What is the temperature of the walk-in?	6



Question Set Count Report

1. Open the OpsAnalitica app.
2. In the left dashboard, select **Reports**.
3. Select **Question Set Count Report**.



4. By clicking on **Question Set Count Report**, you can view all the submitted checklists. These checklists are separated by Year, Month, Location, Question Set, and Count.

Question Set Count Report

Filter [Download]

Location: All locations
Inspection: All inspections

Filter

Year	Month	Location	Question Set	Count
2017				164
	July			6
		Chesterfield		2
			Temp Log	2



Critical Violation Dashboard Report

The Critical Violations Report is a report that you can configure to consolidate all 'critical report' questions that are not answered to max points. For example, you can see temperature violations across 10 different inspections all on one report.

1. Open the OpsAnalitica app.
2. Select **Admin**.
3. By clicking on **Question Set**, you can view a variety of question sets. Clicking on a question set allows you to view individual questions like the one below.

The screenshot shows a configuration window titled "Enter Number Question". At the top right are icons for copy and download. Below the title bar are tabs for "Question" and "Help". The main question text is "What is the temperature of the walk-in?". Below the question are several configuration fields: "Possible Score" (10), "Status" (Active), "Rules" (+ Add Rule), "Precision" (0), "Before" (Label befor), "Hint" (Hint wh), and "After" (Fahrenl). A "Tags" field contains "Refrigeration" and "Critical". A "Number Cold Hold" rule is listed with a trash icon.

The question above has the tag 'Critical', which is a key component in the Critical Violations Report because without it, the report would not include this question. The Critical Violations Report runs off of 'Critical' question tags, 'Not Safe' response tags, or 'Unsatisfactory' response tags.

4. If a question does not have a temperature rule associated it to generate a 'Not Safe' tag, you can manually add a 'Unsatisfactory' tag (this works on True/False, Multiple Choice, and Number questions) by selecting **+Add Rule**, followed by **Number Tag Unsatisfactory If Response is Less Than Possible Score**.



OpsAnalitica
OpsAnalitica Demo Org

- Inspector
- Responses
- Dashboard
- Reports
- Admin
 - Organizations
 - Users
 - Roles
 - Locations
 - Question Sets**
 - Filters
- OpsAnalitica University
- Support

Enter Number Question

Question Help

What is the temperature of the walk-in?

Possible Score: 10 Tags: Refrigeration Critical

Status: Active

Rules: + Add Rule

Number Cold Hold

Precision: 0

Before: Label befor Hint: Hint wh After: Fahrenl

OpsAnalitica
OpsAnalitica Demo Org

- Inspector
- Responses
- Dashboard
- Reports
- Admin
 - Organizations
 - Users
 - Roles
 - Locations
 - Question Sets**
 - Filters
- OpsAnalitica University
- Support

Select Rules

- Number Tag Unsatisfactory If Response is Less Than Possible Score
- Number Set Score Equal to Response
- Number Required
- Number Require Comment If Response is Less Than Possible Score
- Number Hot Hold
- Number Give Full Score for Any Repsonse
- Number Freezer Rule
- Number Cold Hold
- Number Beer Rule
- Number AC Rule

+ Done



OpsAnalytica Version 2.0 App Manual

5. Select **Dashboard**, then **Ops**. Under **Critical Violations** you will be able to view all of the questions that fall under this category.

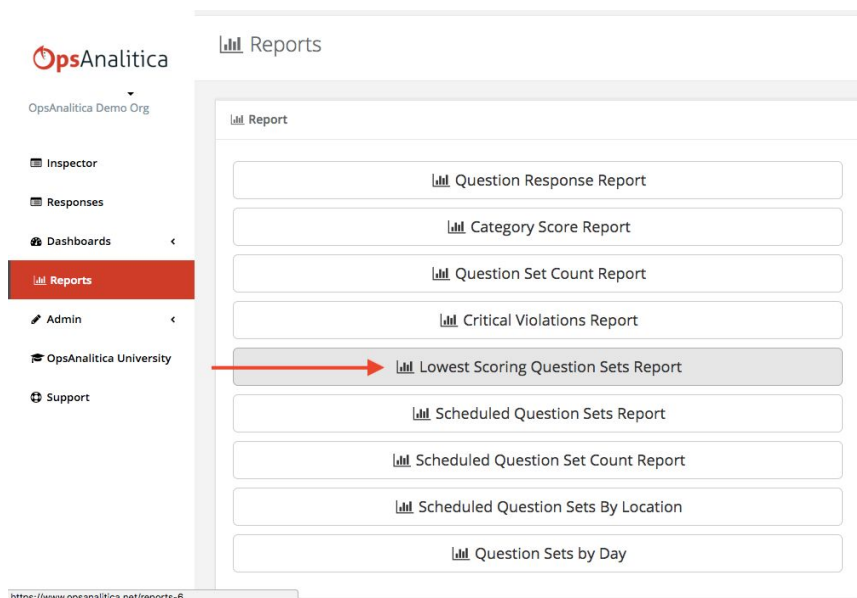
The screenshot displays the OpsAnalytica dashboard interface. On the left is a navigation sidebar with the following items: Inspector, Responses, Dashboards (selected), Ops (highlighted in red), Scorecard, Reports, Admin, OpsAnalytica University, and Support. The main content area is titled 'Ops Dashboard' and features a filter section with the following settings: Location: 'All my locations', Question Set: 'All question sets', From: '2018-01-02', and To: '2018-01-03'. Below the filter is a red bar with a 'Filter' button. The dashboard contains several data cards: 'Completed' (0 Total), 'Score' (No Data Average), 'Scheduled' (0 On-Time, 10 Not Complete), and 'Critical Violations' (0). A red arrow points to the 'Critical Violations' card. A donut chart on the right shows 'Not Complete: 100%'.



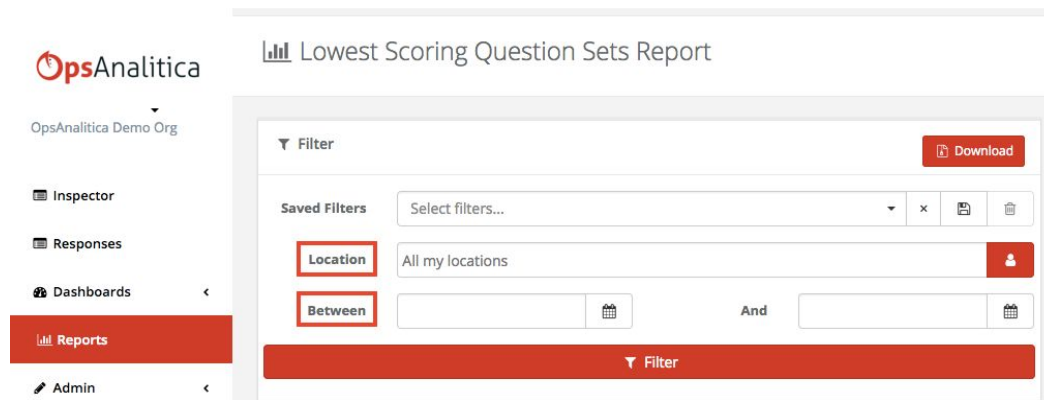
Lowest Scoring Question Set Report

This is a component of the Daily Dashboard - where it can only be seen from a one-day perspective. The Lowest Scoring Question Set Report has now been moved to Reports, where it can be looked at over time.

1. Open the OpsAnalitica app.
2. Select **Reports**, then select **Lowest Scoring Question Sets Report**.



3. The report can be filtered by time and location.



4. By selecting the icon by **Location**, you can choose between filtering **All Locations** or **All my Locations**.





Location

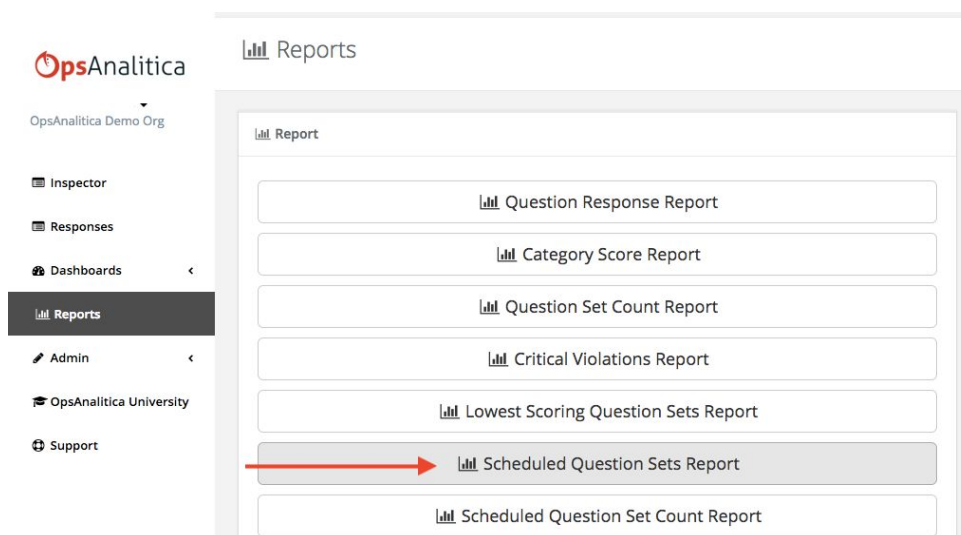
All my locations



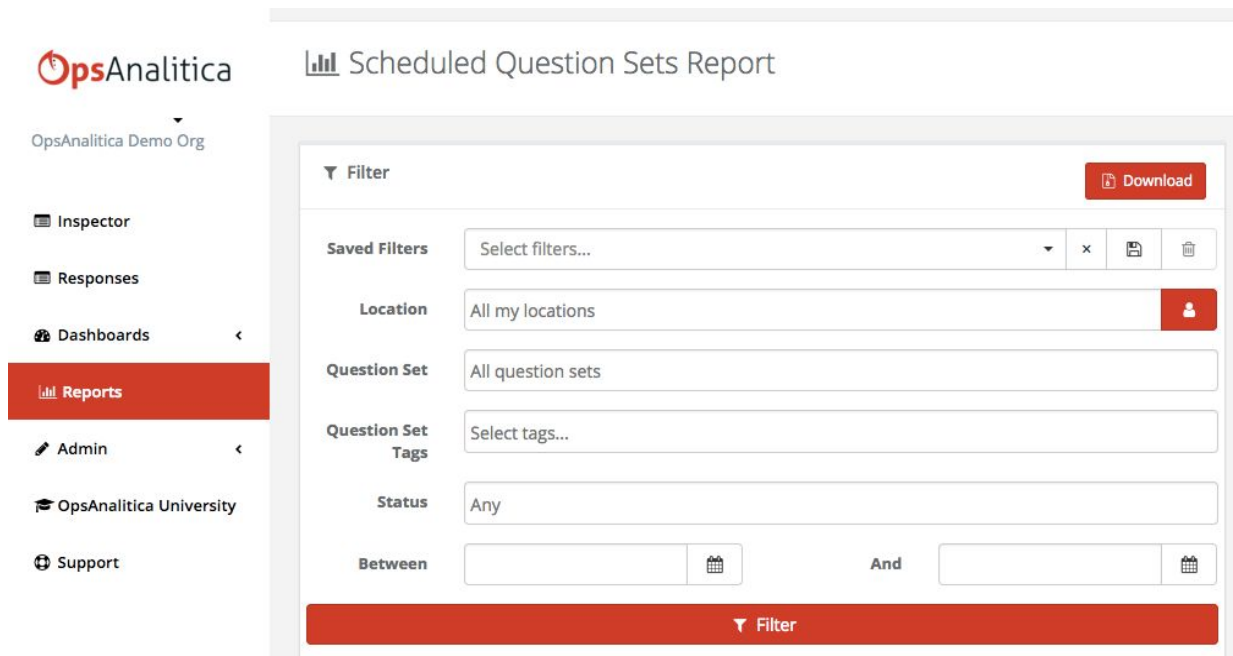
Scheduled Question Sets Report

This report is one of the Ops Dashboard Drilling Reports. It contains each and every checklist that is scheduled to be completed and their completed status.

1. Open the OpsAnalitica app.
2. Select **Reports**, then select **Scheduled Question Sets Report**.



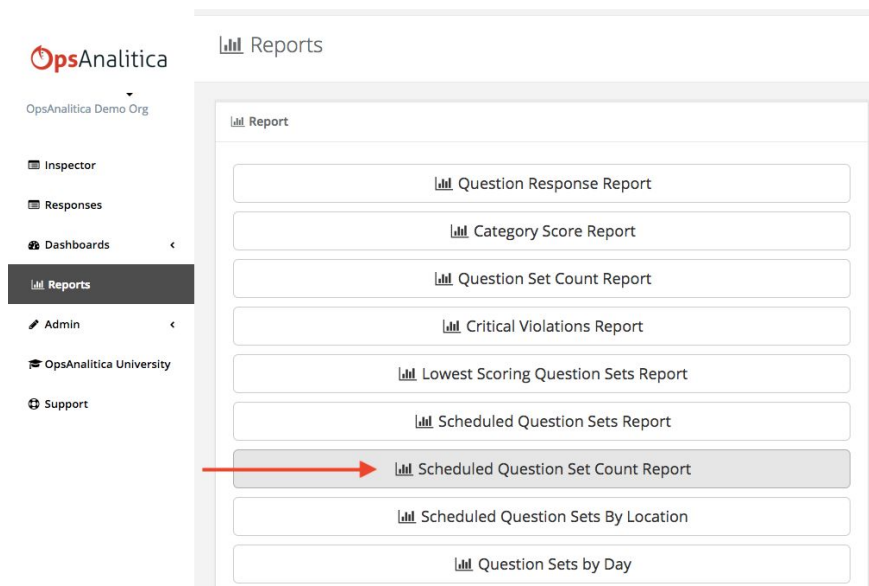
3. You can filter the reports to see comments, different schedules, question sets, locations, and due dates. By selecting the **Status** box, you can filter by the level of completion for each checklist.



Scheduled Question Set Count Report

This is a compliance report that will show by month, year, or location, how many of each checklist were completed on time, late, and not completed. This is an easy way to track how a restaurant is doing month to month.

1. Open the OpsAnalitica app.
2. Select **Reports**, then select **Scheduled Question Set Count Report**.





- The report can be filtered by Saved Filters, Location, Question Set, or Question Set Tags. The total of checklists completed will appear under the categories **On Time**, **Late**, **Not Complete**, and **Total**.

Year	Month	Location	Question Set	On Time	Late	Not Complete	Total
2018				34	61	1632	1727
	June			0	0	1	1
		Tech Center		0	0	1	1

Scheduled Question Sets By Location

This is a compliance report that allows you to look at your locations and see the percentage of checklists that are being completed on time, late, and or not completed at all.

- Open the OpsAnalytica app.
- Select **Reports**, then select **Scheduled Question Sets By Location**.

- Question Response Report
- Category Score Report
- Question Set Count Report
- Critical Violations Report
- Lowest Scoring Question Sets Report
- Scheduled Question Sets Report
- Scheduled Question Set Count Report
- Scheduled Question Sets By Location**
- Question Sets by Day



3. You can filtered the checklists by Date Range filters, Locations, and more.

Location	On Time	Late	Not Complete
Highlands	0.22%	0.00%	99.78%
Tech Center	2.96%	1.96%	95.08%

4. Set a standard for your restaurant.

- For example, you can set an expectation of 90% of checklists completed on time, and no more than 20% completed late. In order to get the completed number, add up the on time and late checklists.

Location	On Time	Late	Not Complete
Highlands	0.22%	0.00%	99.78%
Tech Center	2.96%	1.96%	95.08%

5. REMINDER

ON TIME

Scheduled checklists that were completed before the due date

LATE

Scheduled checklists that were not completed before the due date, but were completed within 24 hours after the due date

NOT COMPLETE

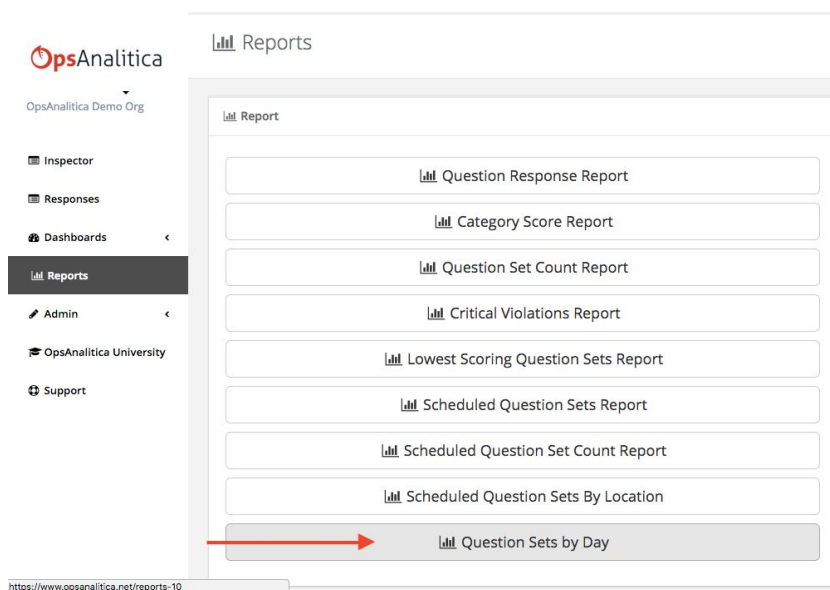
Scheduled checklists that were never completed



Question Sets By Day

An information dense report that will allow you to compare responses to a question set next to each other.

1. Open the OpsAnalitica app.
2. Select **Reports**, then select **Question Sets By Day**.



3. The **Date Range** and **Question Set** filters must be applied to this report in order to get data. Adding the **Location** filter is also advised to limit the data.
4. On the left, all the checklist questions appear. At the top, every submission from the checklist appears next to each other with the date and time they were completed.



OpsAnalitica Version 2.0 App Manual

The screenshot shows the OpsAnalitica interface with a sidebar on the left containing navigation options: Inspector, Responses, Dashboards, Reports (highlighted), Admin, OpsAnalitica University, and Support. The main content area displays a table with a 'Filter' button at the top. The table is divided into sections: 'Chemical' and 'Cooler'. The 'Chemical' section contains two rows of data, and the 'Cooler' section contains two rows. Red boxes highlight specific areas, and red arrows point to 'Submissions' and 'Questions'.

	Tuesday	Thursday	Wednesday	Tuesday	Friday
	5/1/2018	5/3/2018	5/9/2018	5/15/2018	5/25/2018
PM Line Check		AM Line Check	PM Line Check	Chem check	AM Line
	05:28 PM	11:50 AM	09:12 AM	04:25 PM	09:34 AM

Chemical							
What is the concentration of your Quat?							
What is the concentration of your sanitizer?					200.00		

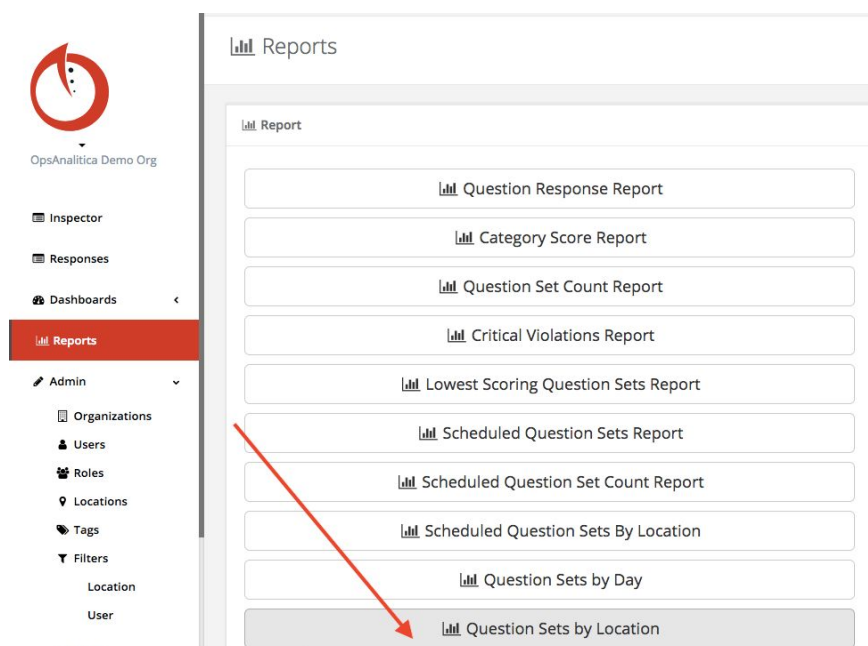
Cooler							
What is the temperature of the Ranch Dressing?	65.00	66.50	66.00	68.30		62.10	85.60
All cold hold food products were kept below 41 degrees.	False		False	False		False	False



Question Sets by Location

Similar to the *Question Sets by Day* report, this report groups responses over time at a specific location.

1. Open the OpsAnalitica app.
2. Select **Reports**, then select **Question Sets By Location** (NOTE: do not confuse this report with the Scheduled Question Sets by Location).



3. Select a Location and a Date Range. Then, select **Filter**.



Question Sets by Location

Filter

Saved Filters Select filters... [x] [Save] [Trash]

Location STL x Chesterfield x Cap x Downtown x Tech Center x Highlands x [User Icon]

Question Set All question sets

Response All responses

Between 2018-09-17 [Calendar] **And** 2018-09-18 [Calendar]

Filter



Custom Report Filters

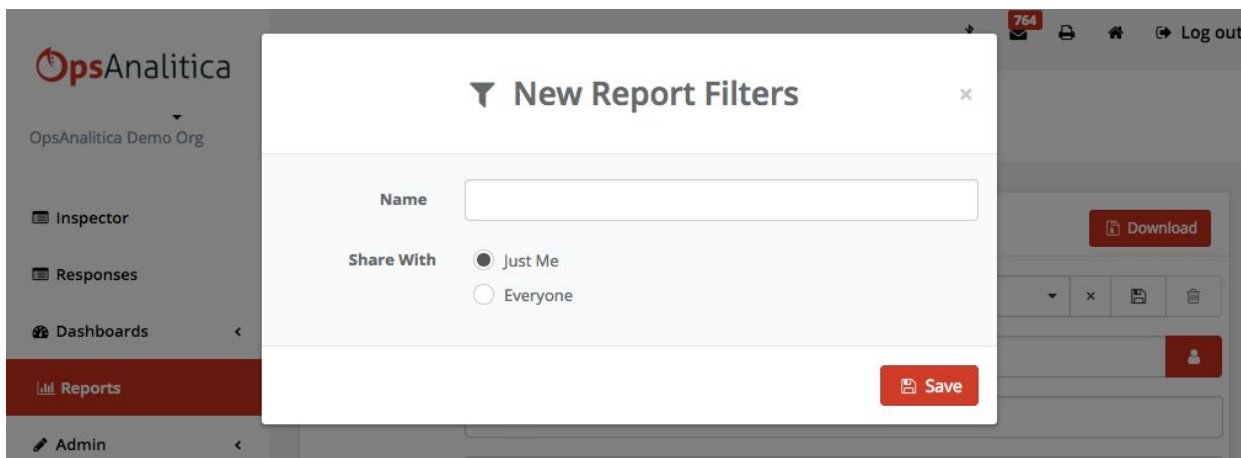
Allows you to save commonly used filters so that they can be applied to a report with one click.

1. Open the OpsAnalitica app.
2. Select **Reports**, then select any one of the reports. (In this example, **Question Reponse Report** is used).
3. For this example, let's say that John Smith wants to see refrigeration questions that were not safe responses. All he has to do is filter his question sets based on those parameters.

Time	Location	Inspector	Question Set	Category	Question	Response	Comment	Score	Possible Score
1/29/18 10:06 AM	Tech Center	Tommy Yionoulis	Temp Log	Cooler	What is the temperature of the walk- in?	42.00	Door was open during delivery. Closed now will re-temp	0	10
1/18/18 3:14	Tech Center	Tommy Yionoulis	Closing Checklist	Coolers	What is the temperature	65.00	Test	0	10

4. To save the filter, select the **Save Filter** button.

5. A small screen will appear that allows you to **Name** the filter and decide who the filter will be shared with (**Just Me** or **Everyone**).



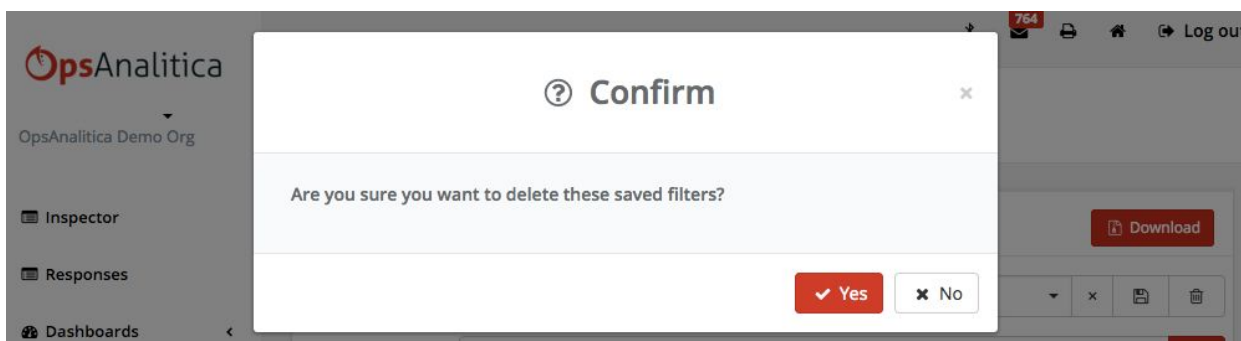
6. Select **Save**. The filter will now be accessible in the **Saved Filters** dropdown menu.



7. To delete the filter, select the **Trash** icon.



8. A small screen will appear confirming that you want to delete the filter.





| Notifications |

Overview of Notifications and Alerts

An explanation on what kinds of notifications that you can get from the system and how you can get them from the system.

Notifications can be sent out for two things:

1. Late Checklists
 - In order to get late checklist notifications, you need to have a daily or weekly schedule set up so that late checklists can be sorted.
2. Critical Violations
 - Critical violation notifications are triggered, by default, by temp questions that are in the danger zone. However, any question can be configured to be critical.
 - Selecting on a critical violation notification will take you directly to what triggered the notification.

Notifications can be sent to the following places:

1. The OpsAnalitica app inbox.



2. User emails.



3. Push notifications to Google Chrome, Android devices, or iOS devices.

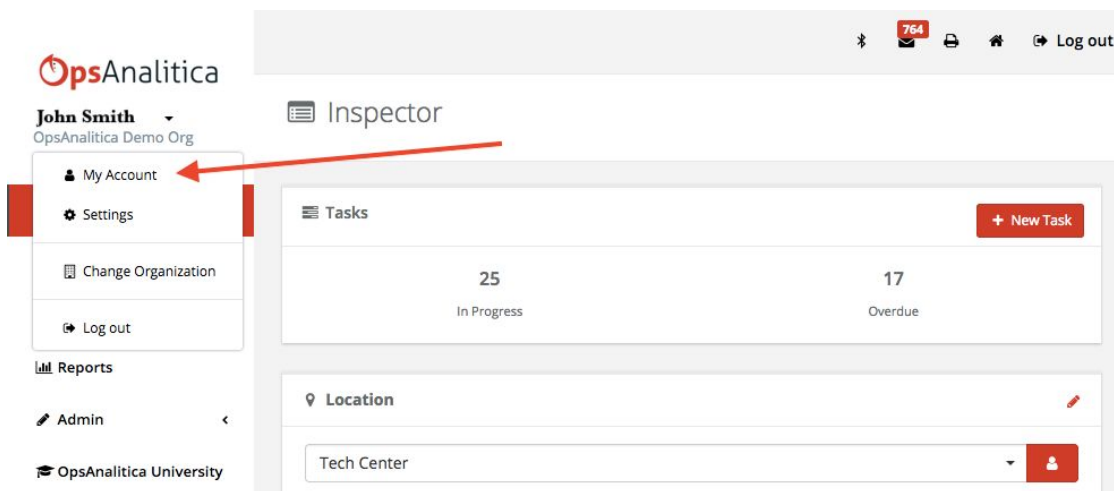




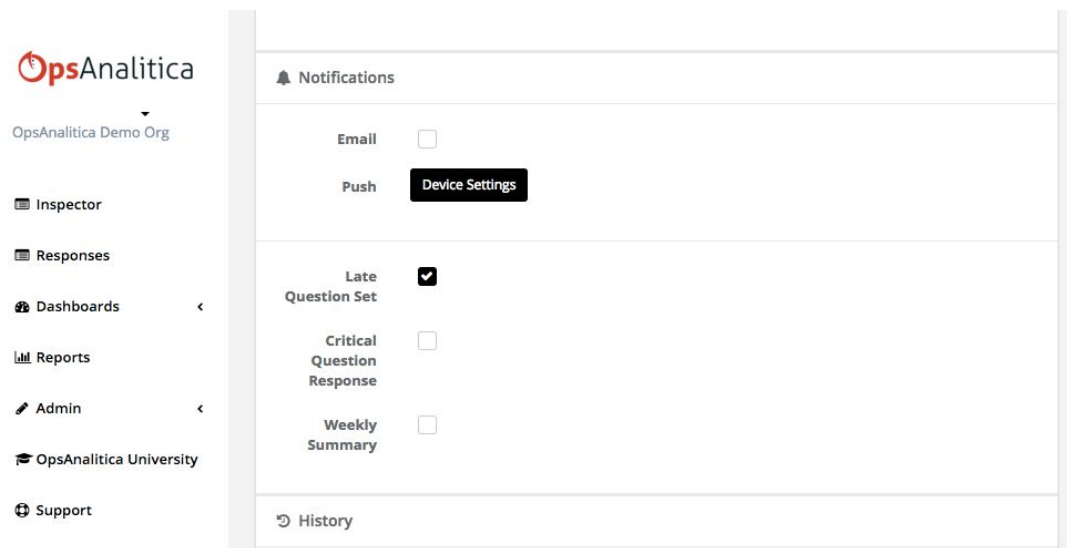
Configuring Your Notifications

By default, the system sends out two types of notifications: *Late Notifications* and *Critical Violations notifications*. They can be accessed in your inbox or by push notifications once they are configured.

1. Open the OpsAnalitica app.
2. Select the drop-down menu tab, then select **My Account**.



3. Scroll down to the **Notification** section. This is where you set email/push settings.



4. Select the boxes for the different types of notifications that you want.
 - NOTE: Most people will manage the platform on a daily basis or they manage the platform on a weekly basis (e.g. A VP of Ops would not need to see every critical and late notification so they would use the **Weekly Summary** notification).
 - Weekly Summary notifications require email to be enabled.



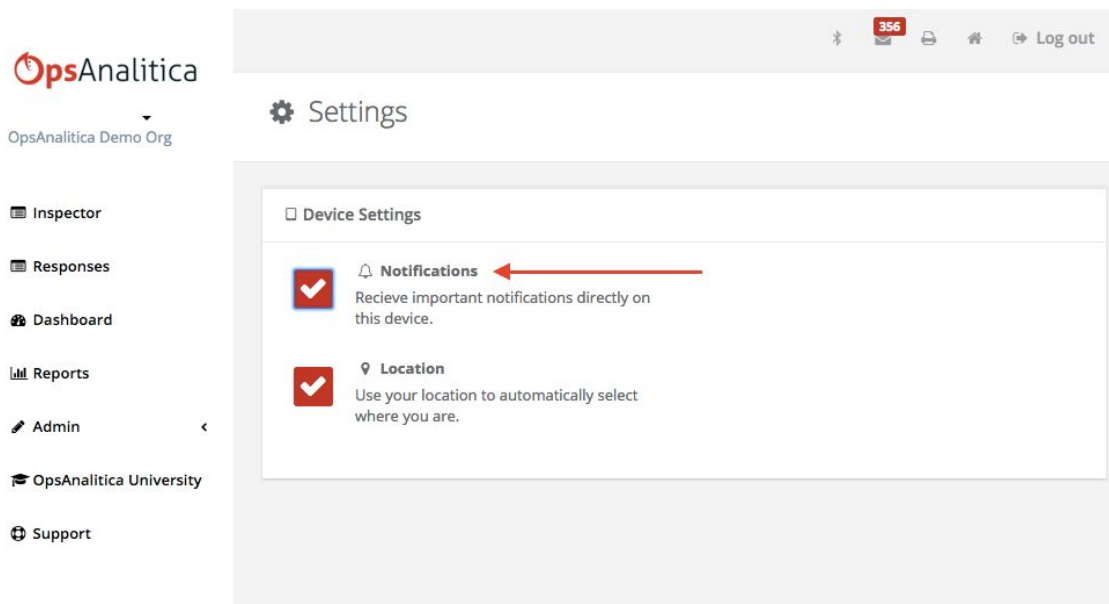
Setting Up On Device Notifications

How to set-up on device notifications in the Google Chrome Browser and for Android Devices.

1. Open the OpsAnalitica app.
2. In the dropdown menu beside the username, select **Settings**.

The screenshot shows the OpsAnalitica app interface. At the top, there's a navigation bar with the OpsAnalitica logo, a user profile dropdown for 'John Smith', and a 'Log out' button. Below the navigation bar, there's a 'My Account' section with a dropdown menu. The 'Settings' option in this menu is highlighted with a red arrow. The main content area is titled 'User' and contains several input fields: 'Title' (Mgr), 'First Name' (Thomas), 'Last Name' (Yionoulis), 'Email' (thomasyionoulis@gmail.com), 'Mobile', 'Password', and 'Confirm Password'. At the bottom, there's a 'Notifications' section with an 'Email' checkbox that is currently unchecked.

3. Check the box beside **Notifications**. Make sure that your **Location** box is always checked.



4. By enabling notifications, you will not only receive notifications in your app inbox (or user email), but you will also receive pop-up notifications on your device.
5. To disable those notifications, all you have to do it follow the same steps and uncheck the box.



| Tasks and Messages |

Task Overview

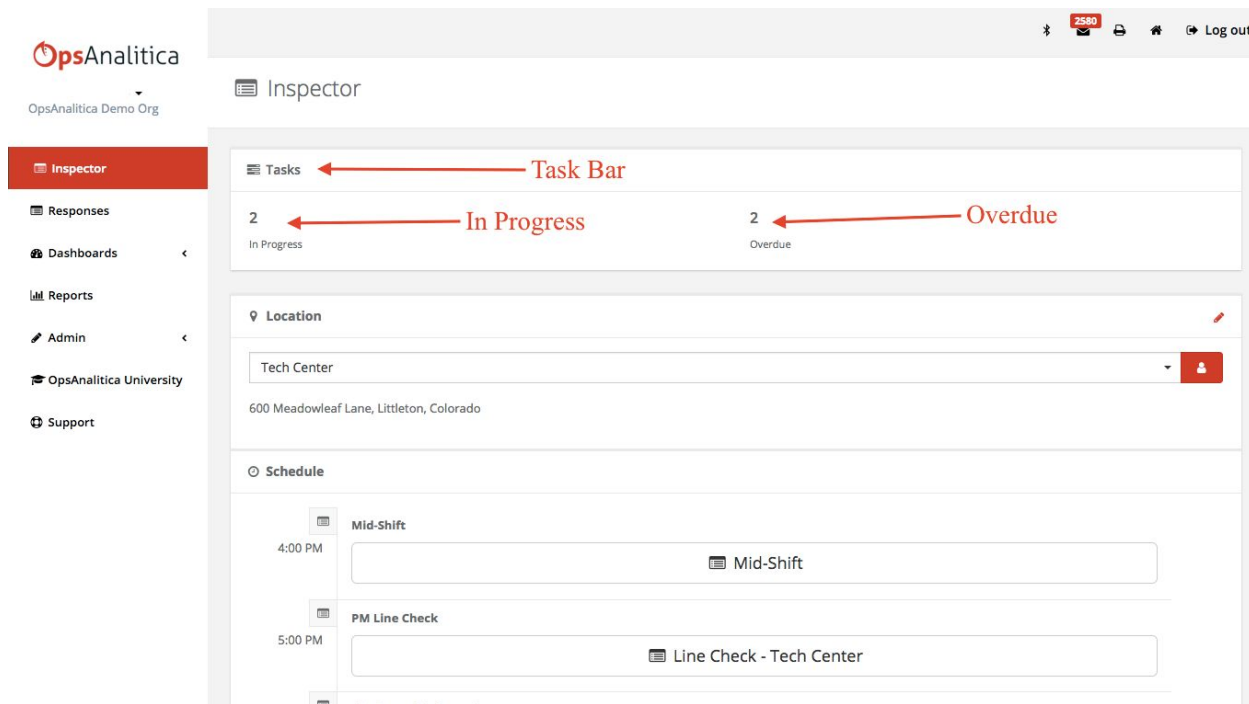
An introduction video on the new Task Management System, which has been added to the platform to give you easier management of your restaurants, visibility when you are not there, and being able to hold your team accountable. Tasks are the best way to get a job done.

The Task Notification Bar

The Task notification bar appears under **Inspector** in the platform. A culmination of tasks appear in the bar, including tasks you have created and assigned to someone else and tasks that have been assigned to you.

The bar shows:

- How many tasks are in progress
- How many tasks are overdue

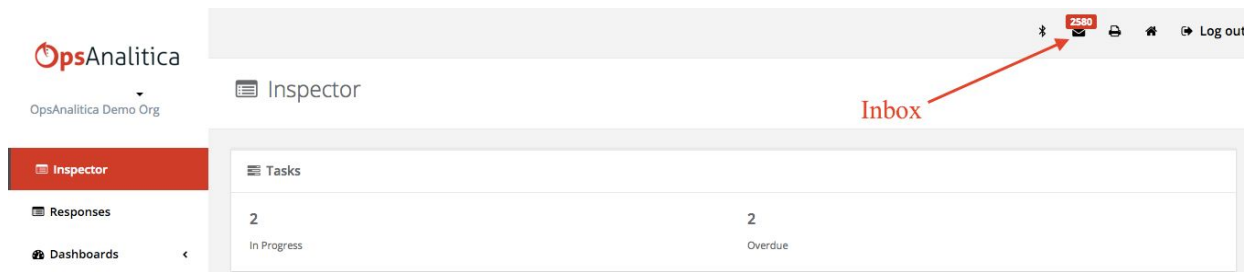




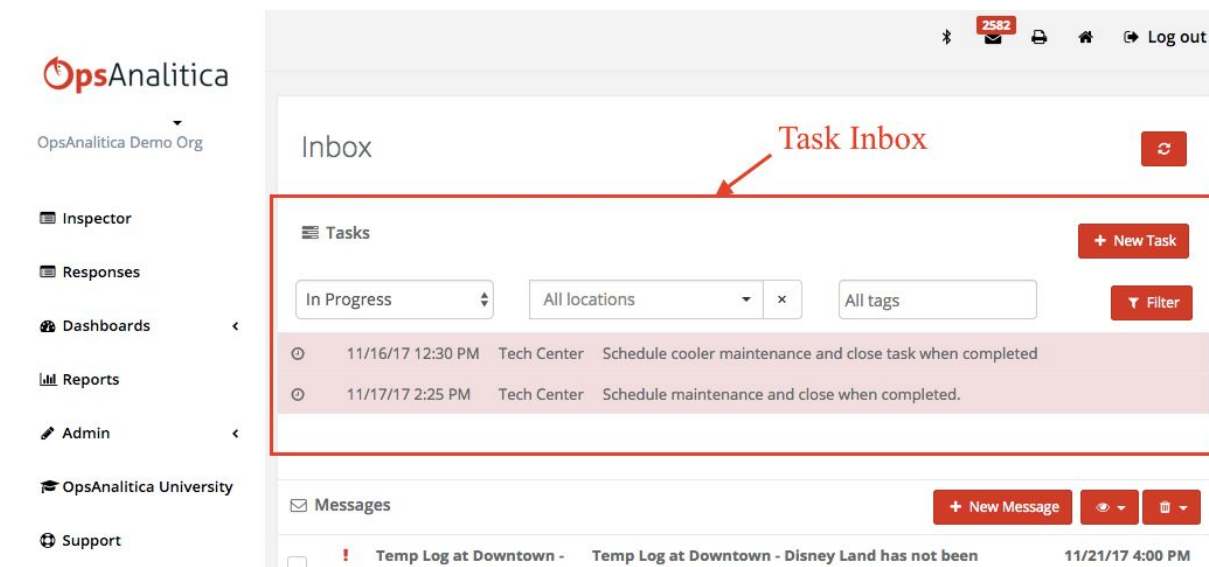
Managing Tasks - Inbox

To manage Tasks, begin by:

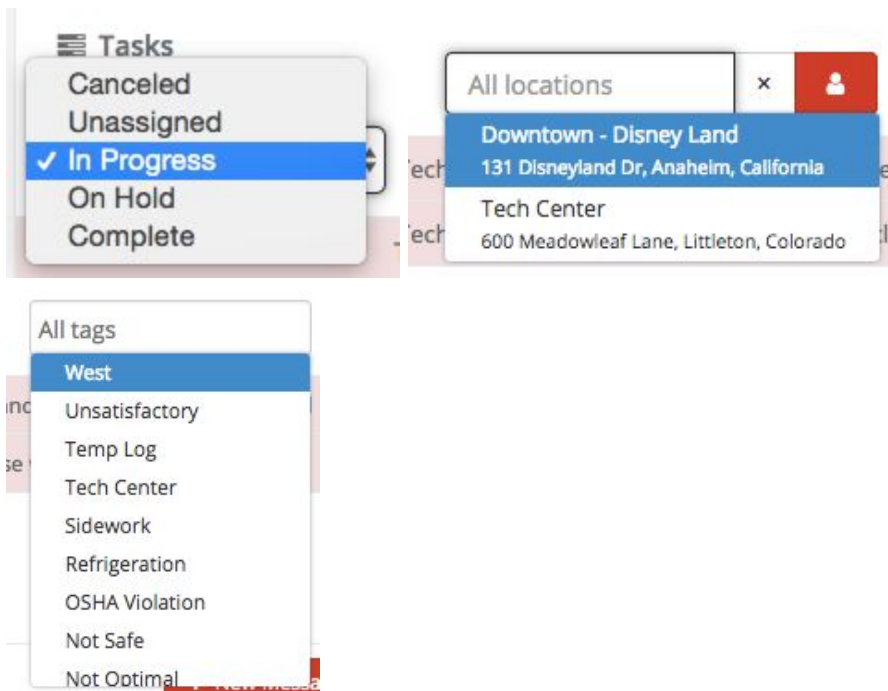
1. Selecting **Inbox** in the upper-right hand corner.



2. In order to manage and work Tasks, you must use your Task Inbox. The next section will go in further depth.



3. The Tasks can be filtered by Status, Location, or by tags. Select **Filter** to do this.

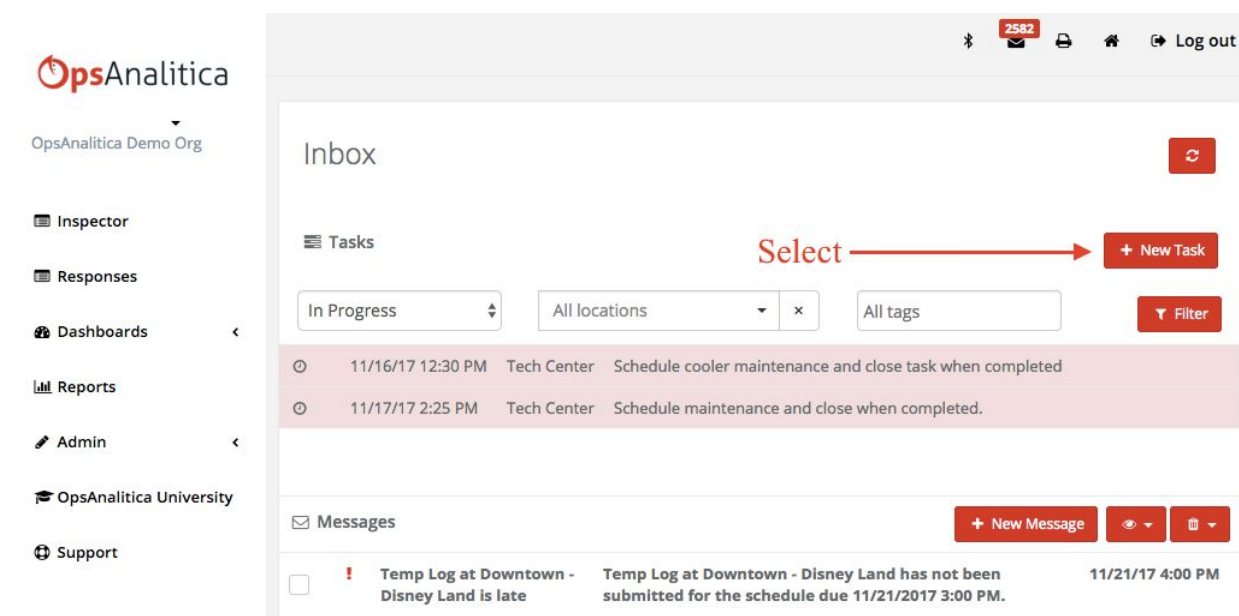


Creating Tasks

How to create Ad-Hoc Tasks and Action Plan Tasks.

Ad-Hoc Tasks

1. Select **Inbox** in the upper-right hand corner.
2. Select **New Task**.





3. Add a description (e.g. “Wax the floors”). Select **Add Photo** in order to show where something needs to be done or fixed if applicable.

New Task Create Task

Description

Add Photo

4. Whenever the app is turned on, it associates with the closest location. By selection **Location**, you can filter tasks based on location (e.g. Tech Center).

Location ▼ × 👤

5. Select the **Status** of the task. Until the task is created, its status will remain **Unassigned**. Once created, it will change to **In Progress**, where it will remain until **Completed**. You may also put a task **On Hold**. The status of a task can be changed whenever.

Status

- Canceled
- ✓ Unassigned
- In Progress
- On Hold
- Complete

6. Select the **Priority** based on your company's preferences.

Priority

- Lowest
- Low
- ✓ Normal
- High
- Highest

7. Select a **Due Date** and **Time**.



Calendar interface for November 2017. The calendar grid shows dates from 29 to 09. The date 22 is highlighted in red. Below the calendar are buttons for 'Today', 'Clear', and 'Close'. A 'Due' field shows the date '2017-11-2' and time '15 P'.

		November 2017							
		Sun	Mon	Tue	Wed	Thu	Fri	Sat	
Location	44	29	30	31	01	02	03	04	
	45	05	06	07	08	09	10	11	
	46	12	13	14	15	16	17	18	
Status	47	19	20	21	22	23	24	25	
	48	26	27	28	29	30	01	02	P
	49	03	04	05	06	07	08	09	

Buttons: Today, Clear, Close

Due: 2017-11-2, 15 P

- 8. Tags are optional ways to group things together.
- 9. Assign the task. It can be assigned to a User Filer or a User.

Assignment dropdown menu with the following options:

- Filter
- Cap
- Chestertown
- Critical Notifications
- Downtown
- Late Question Set Notifications
- Tech Center
- User

Assignees: Select assignees or enter e-mail...



Status	User
	John Smith
	Tommy Yionoulis
	Erik The Red
Due	Admin User
	Thomas Yionoulis
	Chad Test
	Tommy Yionoulis
Assignees	Erik T...
	Select assignees or enter e-mail...

10. More than one User can be assigned to a task. By selecting the **Must Complete** box, an individual must perform the task. The box will be left blank by default.

Assignees	Select assignees or enter e-mail...
	Must Complete Completed
	John Smith <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> ×
	Admin User <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> ×

11. When finished, select **Create Task**.




OpsAnalytica Version 2.0 App Manual

The screenshot displays the OpsAnalytica application interface. On the left is a navigation sidebar with the following items: OpsAnalytica Demo Org, Inspector, Responses, Dashboards, Reports, Admin, OpsAnalytica University, and Support. The main content area is titled 'Inbox' and contains a 'Tasks' section. At the top of the task list, there are filters for 'In Progress', 'All locations', and 'All tags', along with a '+ New Task' button and a 'Filter' button. The task list shows three entries, with the third entry, 'Wax the floors', highlighted in red and labeled 'New Task' with an arrow. Below the tasks is a 'Messages' section with a '+ New Message' button and a table of messages. The messages table has three rows, each with a red exclamation mark icon and a title indicating a task is late. The first message is 'Temp Log at Downtown - Disney Land is late', the second is 'Mid-Shift at Tech Center is late', and the third is 'Temp Log at Tech Center is late'. Each message includes a description of the task and its due date.

Task	Location	Due Date
Schedule cooler maintenance and close task when completed	Tech Center	11/16/17 12:30 PM
Schedule maintenance and close when completed.	Tech Center	11/17/17 2:25 PM
Wax the floors	Tech Center	11/22/17 2:15 PM

Priority	Task	Message	Due Date
High	Temp Log at Downtown - Disney Land is late	Temp Log at Downtown - Disney Land has not been submitted for the schedule due 11/21/2017 3:00 PM.	11/21/17 4:00 PM
High	Mid-Shift at Tech Center is late	Mid-Shift at Tech Center has not been submitted for the schedule due 11/21/2017 4:00 PM.	11/21/17 4:00 PM
High	Temp Log at Tech Center is late	Temp Log at Tech Center has not been submitted for the schedule due 11/21/2017 3:00 PM.	11/21/17 3:00 PM

12. Anything highlighted in red is a late task. A  means priority.



Action Plan Tasks

This differs from the ad-hoc tasks in the sense that it is directly associated to an inspection, a location, and a specific question.

1. Select **Responses** from the Dashboard.

The screenshot displays the OpsAnalitica application interface. On the left is a navigation sidebar with the following items: Inspector, Responses (highlighted in red), Dashboards, Reports, Admin, OpsAnalitica University, and Support. The main content area is titled 'Responses' and features a filter section with a 'Download' button. The filter section includes dropdown menus for 'Location' (set to 'All locations') and 'Inspection' (set to 'All inspections'), along with 'From' and 'to' date pickers. Below the filter is a table of responses.

Inspection	Location	User	Duration	Finish	Score
Temp Log	Tech Center		0:00:00	11/22/17 8:10 AM	
Line Check - Tech Center	Tech Center		0:02:20	11/15/17 2:19 PM	54.55%
Line Check - Tech Center	Tech Center		20:50:06	11/15/17 12:58 PM	77.27%

2. Select a response.
3. In the question, select the dropdown menu and then select **Create Task**.



OpsAnalitica Version 2.0 App Manual

The screenshot shows the OpsAnalitica interface. On the left is a navigation menu with items: Inspector, Responses (highlighted), Dashboards, Reports, Admin, OpsAnalitica University, and Support. The main content area shows a response card for 'Tommy' at 'Tech Center'. The card includes a 'Filter' section with a 'Tags' dropdown. Below that, the response details are shown: Score, Start - Finish (11/22/17 8:10 AM - 8:10 AM), and Duration (0:00:00). The location is '600 Meadow Littleton, Colorado United States'. A 'Cooler' section is visible, containing a table with columns: Question, Response, Time, and Score. The table entry is: Question: 'What is the temperature of the walk-in?', Response: 'Refrigeration', Time: '8:10 AM', and Score: 'Critical'. A red arrow labeled 'Create Task' points to a 'Create Task' button on the right side of the table row. Below the table is a 'Comments' section with a photo placeholder.

4. The response, time/date stamps, audit name, and location will automatically be assigned.

The screenshot shows the 'New Task' form in OpsAnalitica. The form has a 'Description' field with the placeholder 'Describe this task' and an 'Add Photo' button. Below this is a preview of a task card titled 'Temp Log' with the description 'Cooler / What is the temperature of the walk-in?' and 'Response: at 11/22/17 8:10 AM'. A red box highlights this preview card and the 'Location' dropdown menu which is set to 'Tech Center'. Below the preview, there are fields for 'Status' (set to 'Unassigned'), 'Priority' (set to 'Normal'), 'Due' (with a calendar icon), and 'Tags' (with a 'Select tags...' dropdown). At the bottom is an 'Assignees' field with the placeholder 'Select assignees or enter e-mail...'.



5. Add a description (e.g. “Schedule Annual Maintenance”). Select **Add Photo** in order to show where something needs to be done or fixed if applicable. Select **New Task**.

New Task **Create Task**

Description

Add Photo

Temp Log x

Cooler / What is the temperature of the walk-in?
Response: at 11/22/17 8:10 AM

6. Assign a **Due Date and Time**.

Location

		November 2017						
		Sun	Mon	Tue	Wed	Thu	Fri	Sat
44		29	30	31	01	02	03	04
45		05	06	07	08	09	10	11
46		12	13	14	15	16	17	18
47		19	20	21	22	23	24	25
48	Status	26	27	28	29	30	01	02
49		03	04	05	06	07	08	09

Today **Clear** **Close**

Due

- 7.
8. Select the **Priority** based on your company's preferences.

Priority

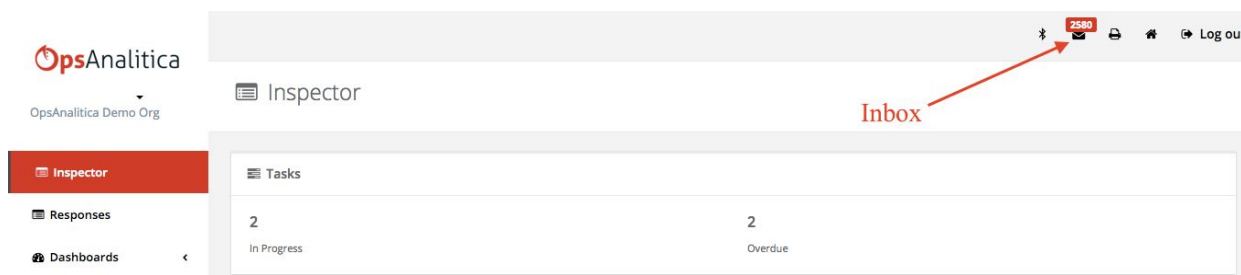
- Lowest
- Low
- ✓ Normal
- High
- Highest

9. Assign the task to a User. (Note: There is no need to check the **Must Complete** box if it is only assigned to one person.)



Completing Tasks

1. Click to you **Task Inbox** by selecting the mailbox button in the upper-right hand corner.



2. When completing tasks, those highlighted in red take priority because they are late.
3. To complete a late task, select it. By default, all that can be done while working a task is to update the task by making comments and photos, which will then update the User who created the task (e.g. leave a comment).

Comment

Menus have come in. Will switch after lunch.

 Add Photo

 Add Comment

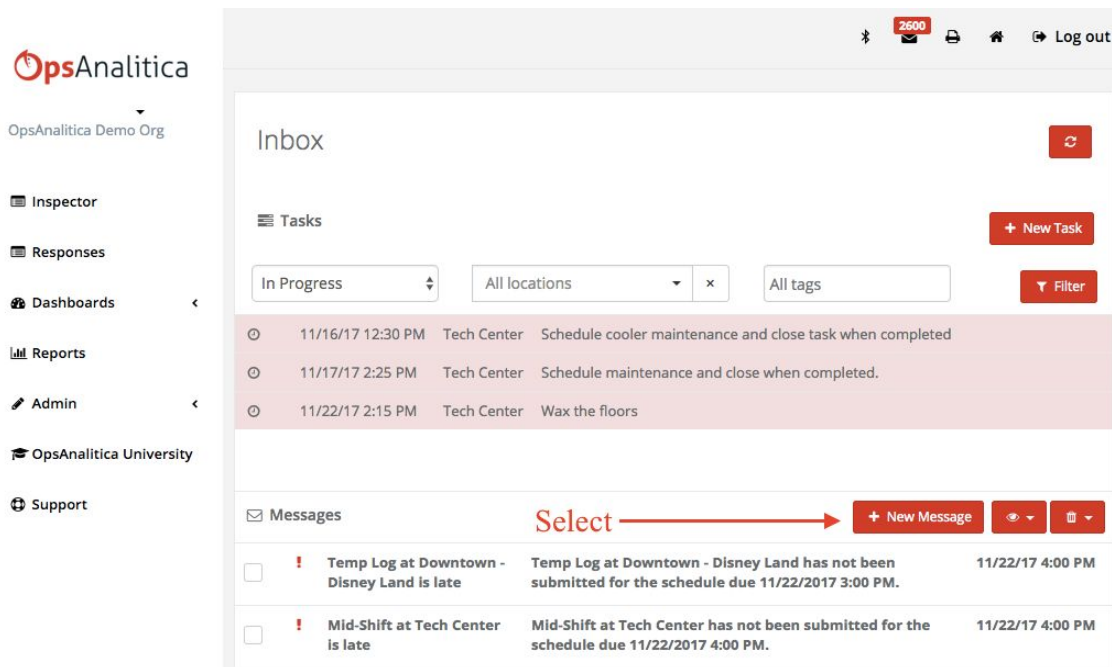
4. Select **Complete**, DO NOT select **Save Task**. The task is now completed and will disappear from the Inbox page.



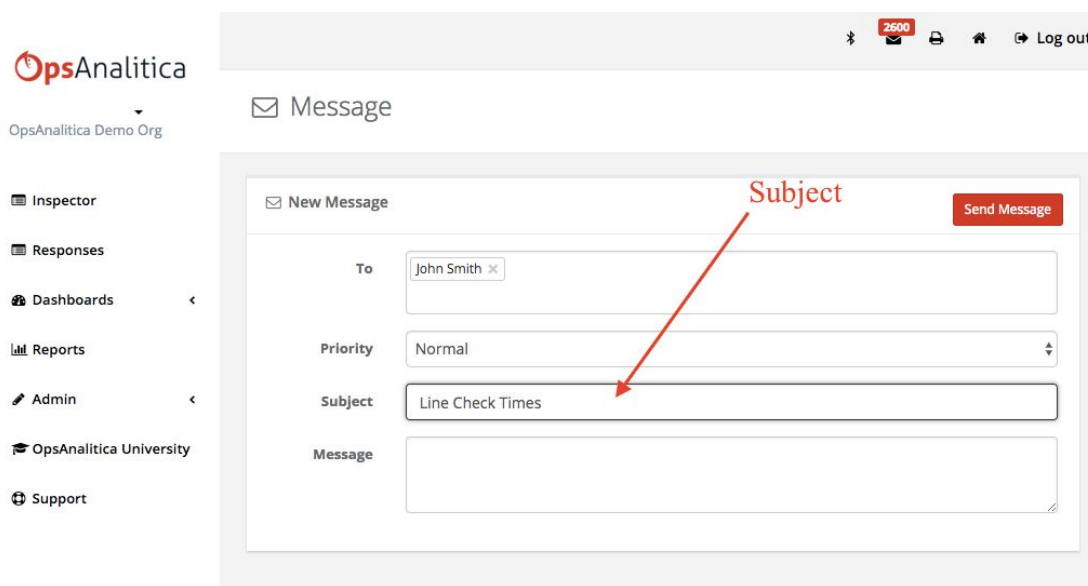
In App Messenger

In app messages appear in your inbox. You can send messages to employees through the app as well. (Note: All app messages are one-way communication; you cannot reply to them.)

1. To send a message, begin by opening your Inbox.
2. Under the messages portion, select **New Message**.



3. Select the recipient of the message (you may select User Filters or Users).
4. Input a Subject (e.g. "Line Check Times").





OpsAnalitica Version 2.0 App Manual

5. Select the priority of the message.

Priority

6. Type your message (e.g. “We are pushing back the like check times by 10 minutes”).

Message

7. Select **Send Message**. Your message will instantly send.

The screenshot displays the OpsAnalitica web application interface. At the top right, there is a notification badge with the number '2600' and a 'Log out' button. The main content area is titled 'Message' and contains a 'New Message' form. The form has the following fields: 'To' (John Smith), 'Priority' (Normal), 'Subject' (Line Check Times), and 'Message' (We are pushing back the line check times by 10 minutes.). A red arrow points from the text 'Select to send' to a red 'Send Message' button. On the left side, there is a navigation menu with items: Inspector, Responses, Dashboards, Reports, Admin, OpsAnalitica University, and Support.

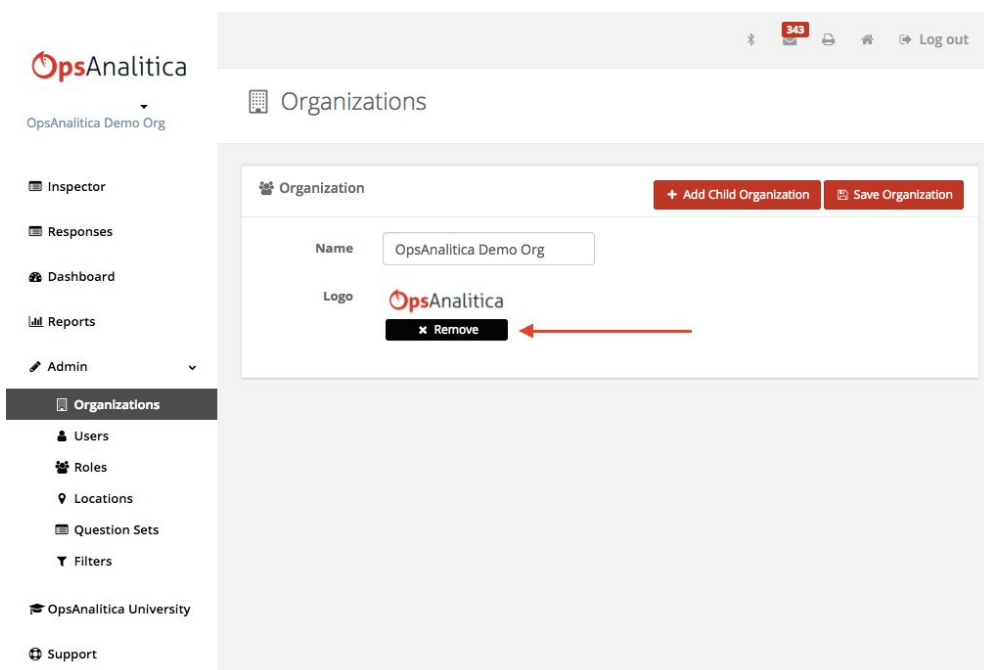


| Admin |

Changing the Portal Logo

Learn how to change your portal logo for all your organizations.

1. Open the OpsAnalitica app.
2. In the **Admin** dropdown menu, select **Organizations**.
3. Select **Remove**. (The current logo will disappear.)



4. Then, select **Save Organization**.
5. Select **Browse**.



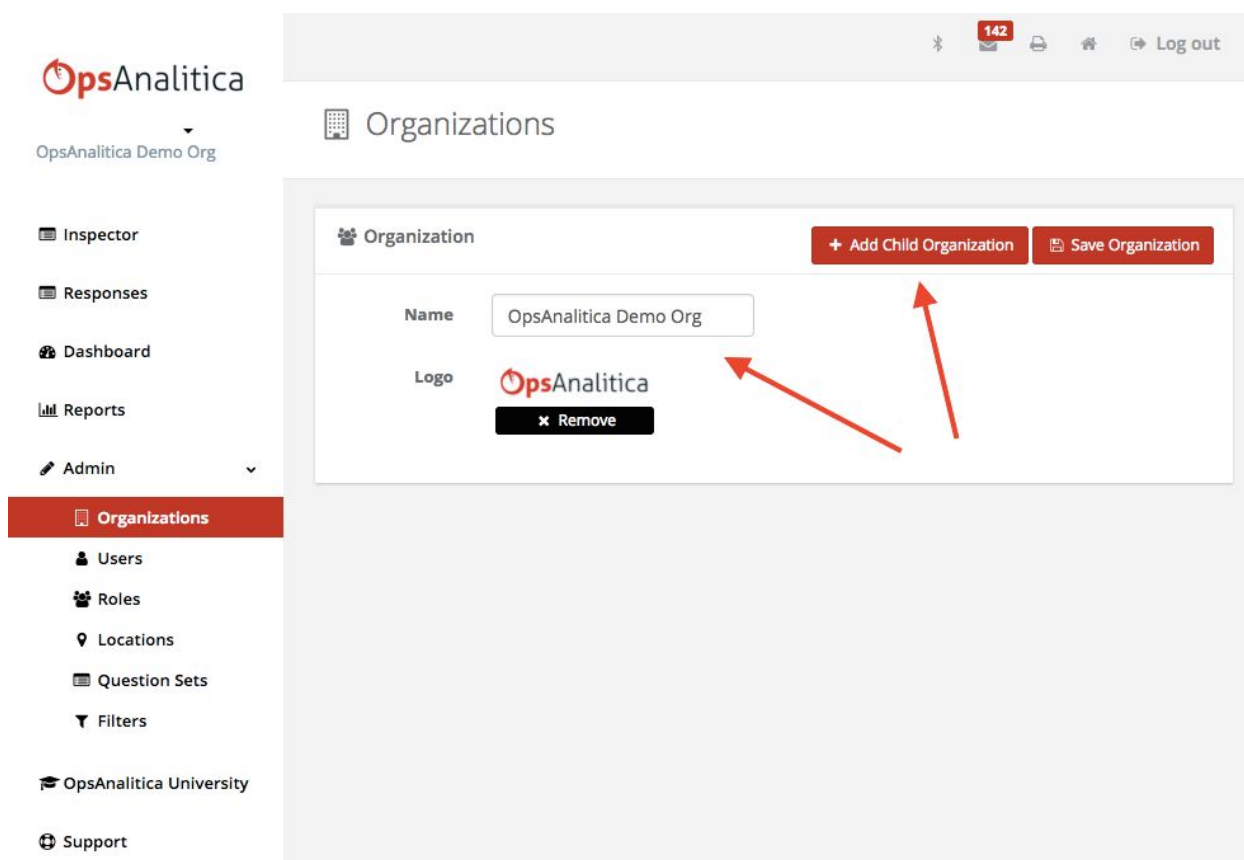
6. Find your logo in your files and select **Choose/Open**. The following file formats are supported by the portal.
 - .SVG (PREFERRED)
 - .PNG
 - JPG
7. Select **Save Organization**.
8. You may notice that the logo does not change. The reason for this is because your web page has been cached by your browser. In order to confirm that your logo has changed, you must switch to a private browsing window.
9. From your private window, login to the portal. Your new logo should appear.



Organization Management

Before creating sub organizations, open up a support ticket and set up a meeting with OpsAnalitica. Sub organizations come with limitations that should be discussed to make sure they are the right decision for your organization.

1. Open the OpsAnalitica app.
2. Select **Admin** in the left side dashboard, followed by **Organizations**.
3. You can edit the name or the already existing organization, or add a child organization by selecting **+Add Child Organization**.

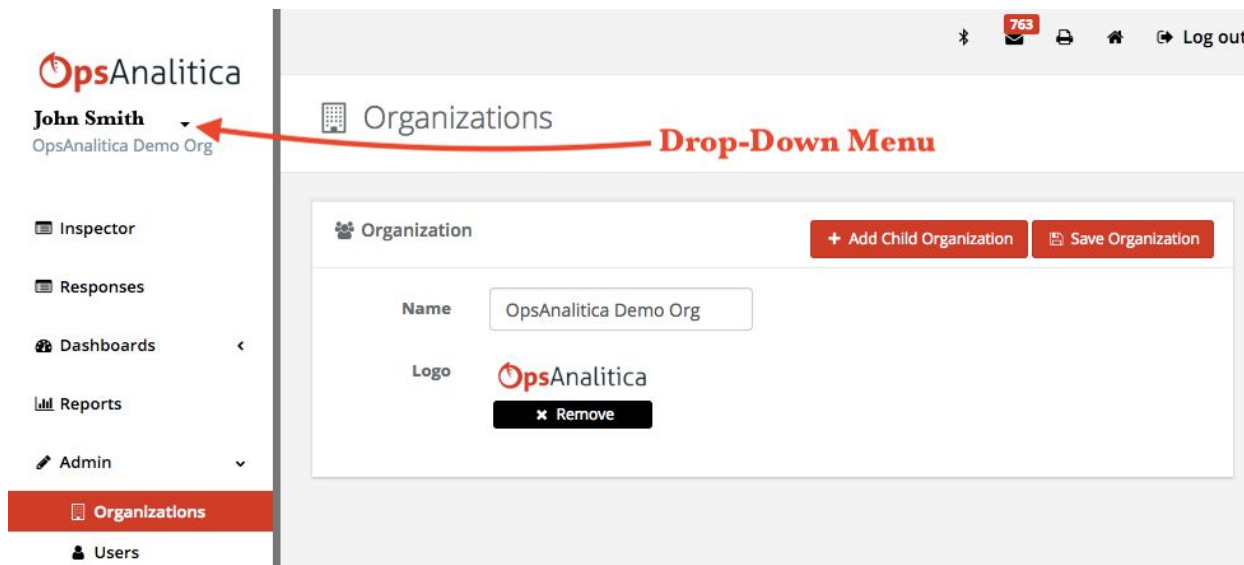


4. Once the name has been inputted, select **Create Child Organization** to save it.

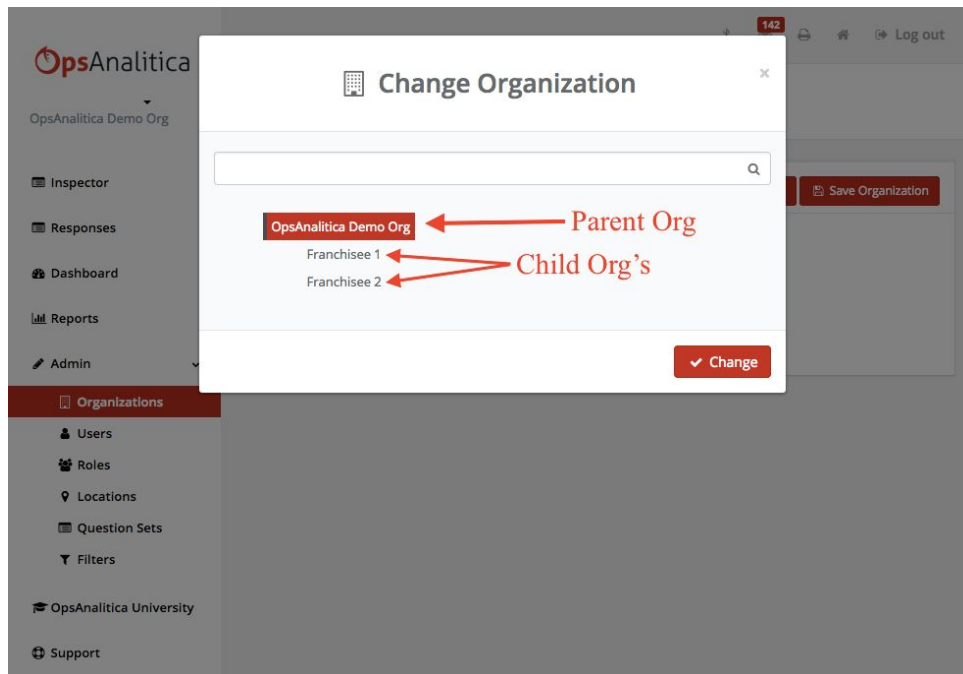


Switching Organizations

1. In order to see the organization structure available to you, select the drop-down menu next to your username.



2. Select **Change Organization**. (You can view the parent organization and child organizations.)



3. To move between organizations, select one, then select **Change**. (Child organizations cannot see each other, nor can they access the parent organization.)



User Management

1. Open the OpsAnalitica app.
2. In the left side dashboard, select **Admin**, then select **Users**.

Editing Passwords

1. Select the user.
2. Input the new password into the **Password** and **Confirm Password** boxes.
3. Select **Save User** (this will automatically save the new password).

The screenshot displays the 'User' management interface. On the left is a navigation sidebar with 'Users' selected. The main form contains the following fields and controls:

- Title:** GM of Downtown
- Status:** Active (dropdown menu)
- First Name:** John
- Last Name:** Smith
- Email:** Demo@opsanalitica.com
- Mobile:** (empty field)
- Tags:** Downtown (tagged field)
- Password:** (masked field)
- Confirm Password:** (masked field)
- Must Change Password:**
- Roles:** Checklist Mgt

Two red annotations are present: an arrow pointing to the 'Save User' button labeled 'Save User', and an arrow pointing to the 'Password' and 'Confirm Password' fields labeled 'New Password'.

Removing a User

1. Select the user.
2. Select **Log Out User** or change the users status to **Inactive**.



OpsAnalytica Version 2.0 App Manual

OpsAnalytica
OpsAnalytica Demo Org

- Inspector
- Responses
- Dashboard
- Reports
- Admin
- Organizations
- Users**
- Roles
- Locations
- Question Sets
- Filters
- OpsAnalytica University
- Support

Users

User

Log Out User Save User

Title: GM of Downtown Status: Inactive

First Name: John Last Name: Smith

Email: Demo@opsanalytica.com Mobile:

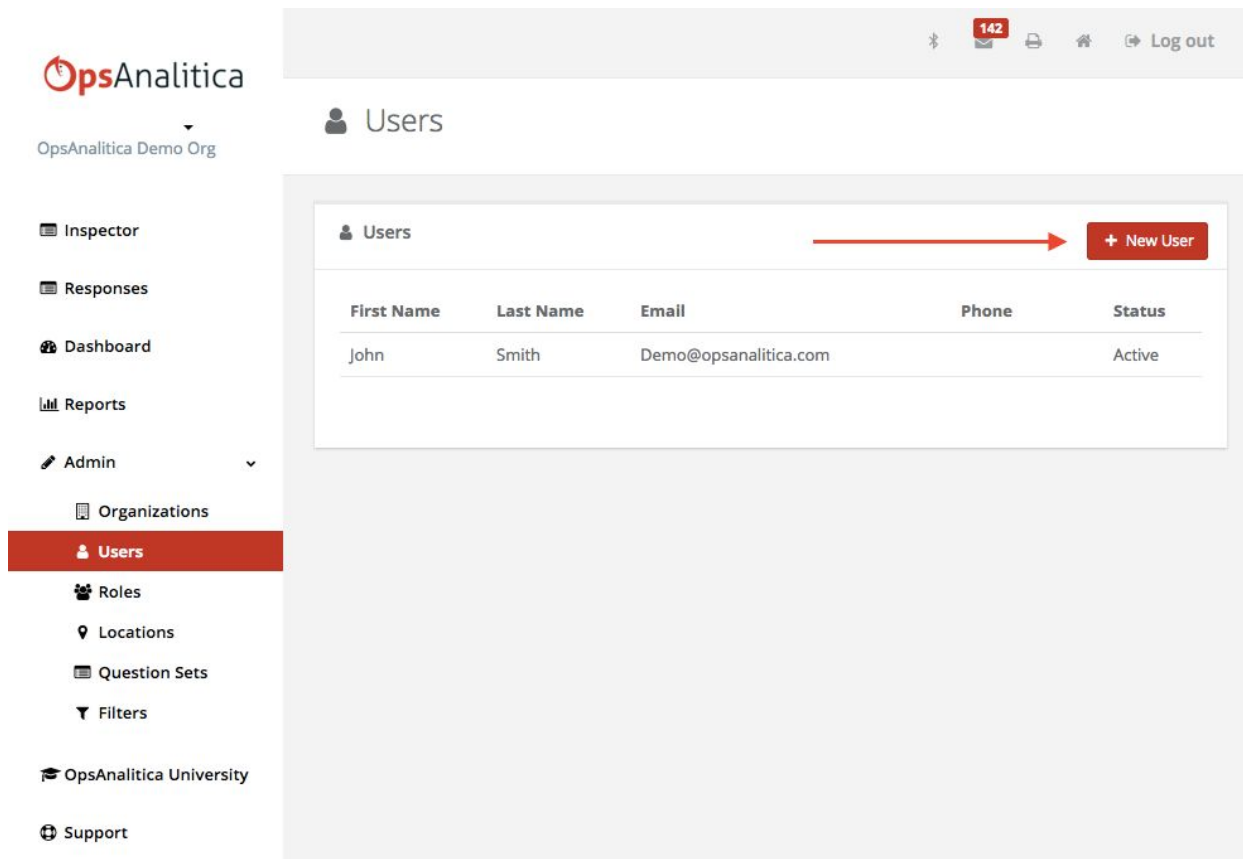
Tags: Downtown

Password: Confirm Password:

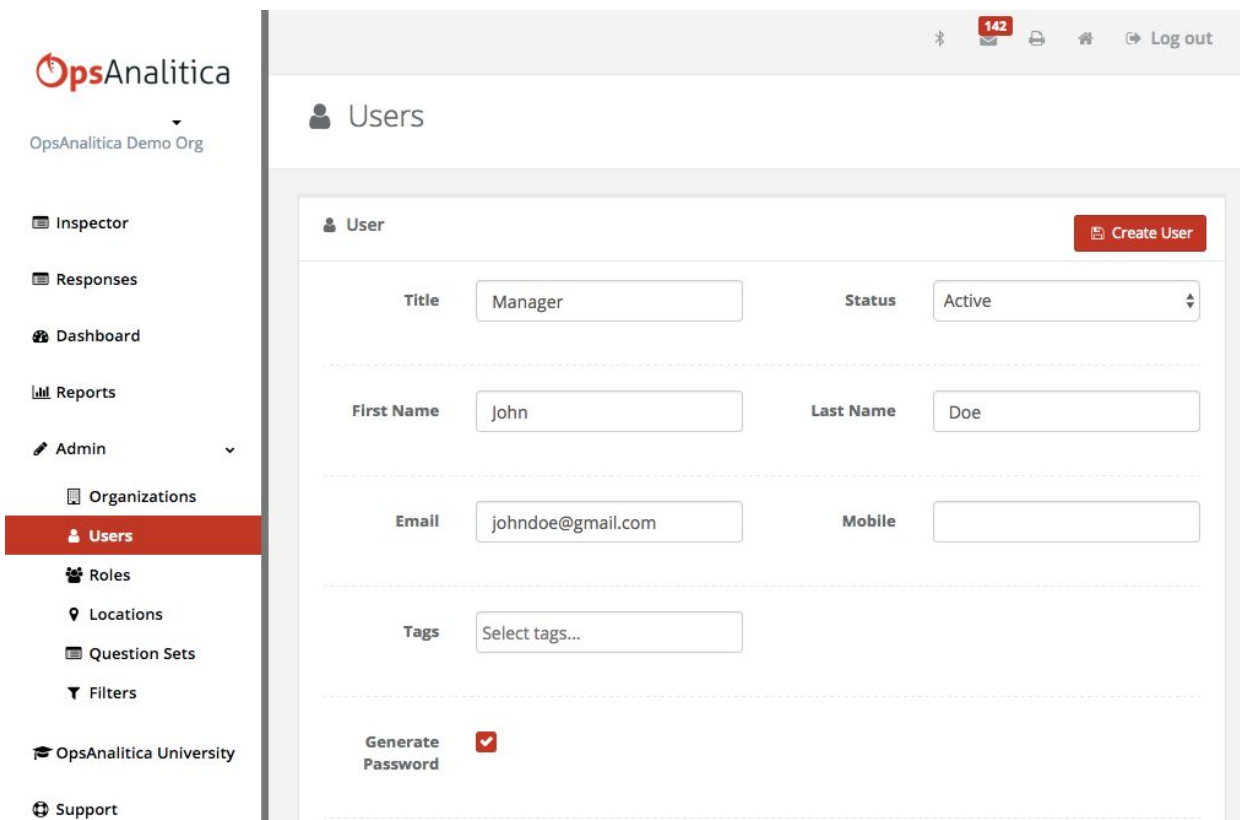


Add New User

1. Open the OpsAnalitica app.
2. In the left side dashboard, select **Admin**, then select **Users**.
3. Select **+New User**.



4. Enter key information such as **Title**, **First Name**, **Last Name**, and **Email**. Then make sure status is set to **Active**.



5. Check **Generate Password**. (The system will randomly generate a password for the new user, which will be emailed to them. The link in their email will allow them to change the password for themselves.)

Roles

- Checklist Mgt
- Inspector
- User Mgt
- View Reports
- Administrator

6. Select the new user's role.
7. Check the **Email** box.
8. Select **Create User**. The new user will now have to check their email for their generated password. (If an email does not appear in the user's inbox, check the spam and junk mailboxes.)



Roles and Users

1. Open the OpsAnalitica app.
2. Select **Admin**, then select **Roles**.

Everything accessible in the OpsAnalitica portal is based upon the following roles. More than one role can be administered at a time.

Checklist Mgt

Someone with the role of checklist management is able to create checklists.

Inspector

The inspector role is given to people who will be conducting checklists. They are able to log on, conduct checklists, and view the responses of the checklists they have created.

User Mgt

The user management role allows for someone to create users, edit them, and activate/deactivate them.

View Reports

The view reports role allows you to have access to the dashboard and the reports button so that you can look at the data that is being generated across all restaurants.

Administrator

The administrator is the default role given to the individual who signed up for the account. This role allows you to do anything in the portal. Note: It is advised that the administrator role is granted sparingly to reduce the clutter of data.



Location Management

1. Open the OpsAnalitica app.
2. In the dashboard on the left, select **Admin**, followed by **Locations**.
3. To add a new location, select **+New Location**.
4. Name your location. For example, the image below shows the name “Downtown.”

5. Input your **Country**, **Address**, **State**, **City**, and **Zip Code**. Your business will appear on the GoogleMap. You can drag the pin on the map to position it exactly where you want it to be. (The example below shows Disneyland Park as the inputted address.)



OpsAnalytica
OpsAnalytica Demo Org

- Inspector
- Responses
- Dashboard
- Reports
- Admin
 - Organizations
 - Users
 - Roles
 - Locations**
 - Question Sets
 - Filters
 - OpsAnalytica University
 - Support

Country: United States
Address: 1313 Disneyland Dr
State: California
City: Anaheim
Zip Code: 92802

Map Satellite

Map showing location in Anaheim, California. Landmarks include Disneyland Park, Knott's Berry Farm, and various streets like E Ball Rd and W Cerritos Ave.

6. Select **+Create Location** to save it.
7. You can delete a location by selecting it, then selecting **Delete Location**.

Inheritable Box

ONLY if you have a multi-tiered organization within the OpsAnalytica spectrum, check the the **Inheritable** box. This makes the location available to everyone in your organization.

Tags

Tags are an advanced functionality that is not necessary for basic location creation. However, if you are interested in using tags to segment reports or for other reasons, contact your OpsAnalytica representative to implement a tag strategy.



| Question Set Management |

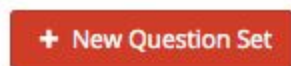
Overview of the Question Set View

View all the currently existing Question Sets. Creating and editing will come later.

1. Open the OpsAnalitica app.
2. In the dashboard to the left, select **Admin**, followed by **Question Sets**. (NOTE: Questions sets require certain roles to gain access.)
3. You can see the **Title**, **Status** (Active or Inactive), and **Tags** (based on location).

Title	Status	Tags
Closing Checklist	Active	Tech Center
Cold Item	Active	
EcoLab Chemical Concentration Test	Active	
EcoSure Demo Checklist	Inactive	
EcoSure Self Evaluation	Active	
Facilities Walkthrough Kitchen	Inactive	
Facility Audit	Active	
Grow House - Sample	Inactive	
Line Check	Active	Tech Center
Line Check Old	Inactive	
Line Check PM	Inactive	

4. To create a new Question Set, simply select **+New Question Set**.



5. Select any Question Set to view it.



Creating a New Question Set

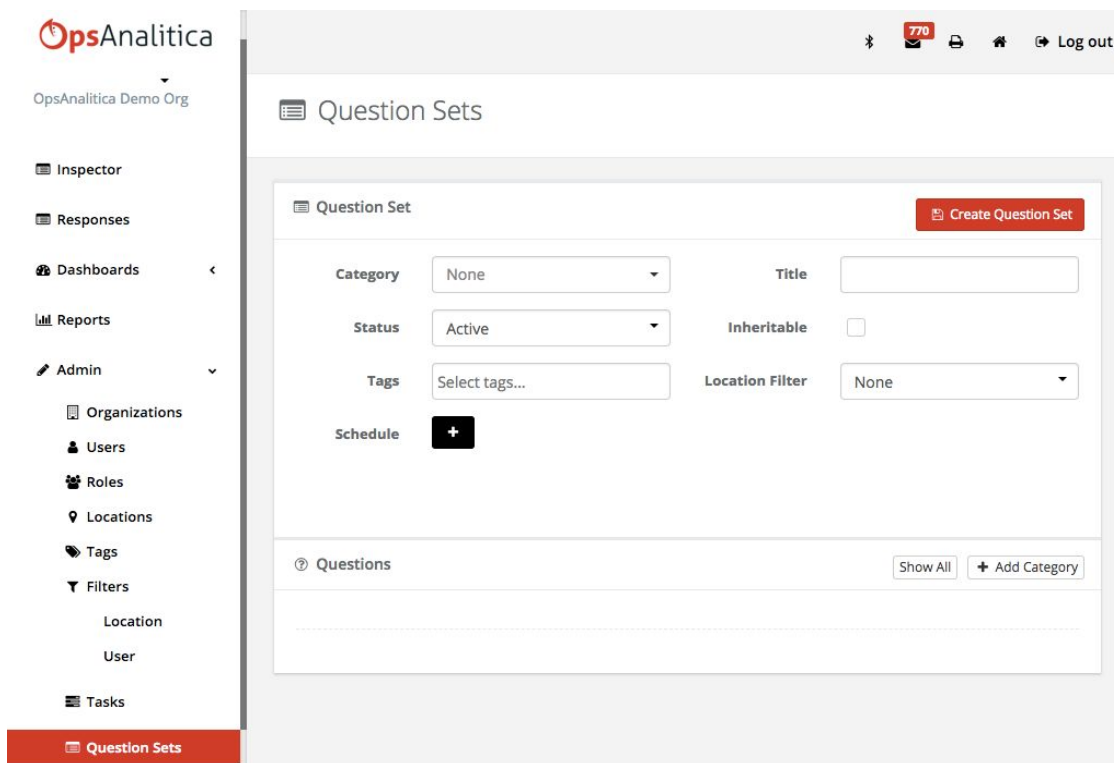
1. Open the OpsAnalitica app.
2. In the dashboard to the left, select **Admin**, followed by **Question Sets**.
3. Select **+New Question Set**.

The screenshot shows the OpsAnalitica Admin interface. The left sidebar contains the following menu items: Inspector, Responses, Dashboard, Reports, Admin (expanded), Organizations, Users, Roles, Locations, **Question Sets** (highlighted), Filters, OpsAnalitica University, and Support. The main content area is titled 'Question Sets' and features a table with the following data:

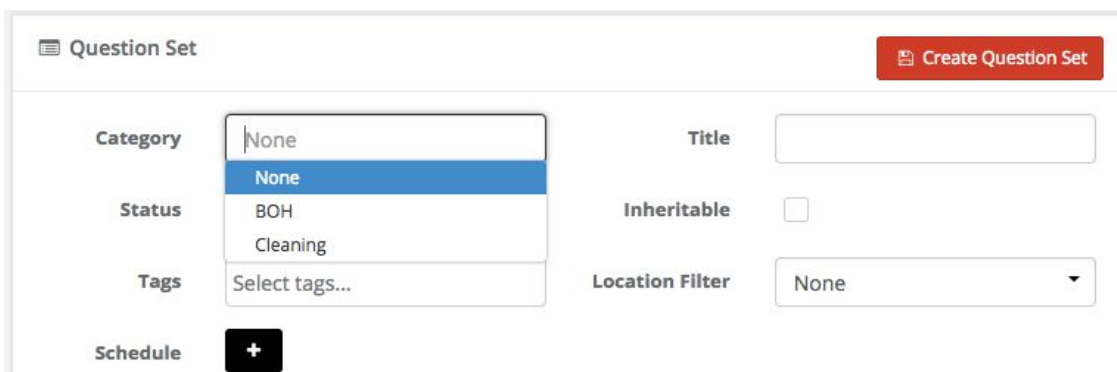
Title	Status
Line Check Old	Inactive
Line Check - Tech Center	Active
Pre-Shift Checklist - Downtown	Active
Temp Log	Active
Facilities Walkthrough Kitchen	Inactive
Multiple Choice Test 2	Inactive
Facility Audit	Active
Demo	Inactive
Closing Checklist	Active
Training Question Set	Active
Opening Checklist	Inactive

A red arrow points to the '+ New Question Set' button in the top right corner of the main content area.

4. There are a variety of question sets that you can create.



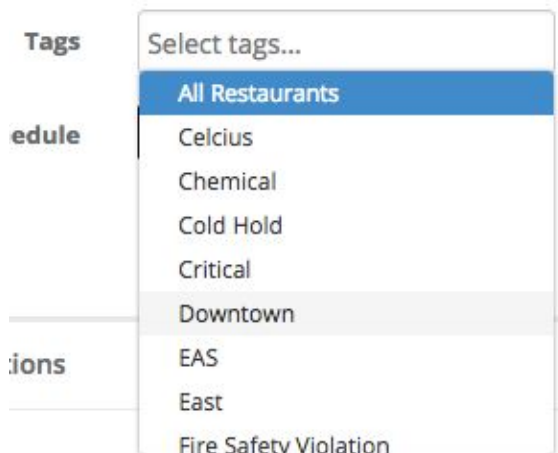
5. Select a **Category**. A Question Set **Category** organizes the inspection list by different categories.



6. Add a **Title** (e.g. Temp Log). All the steps after the **Title** are not required, but are recommended.



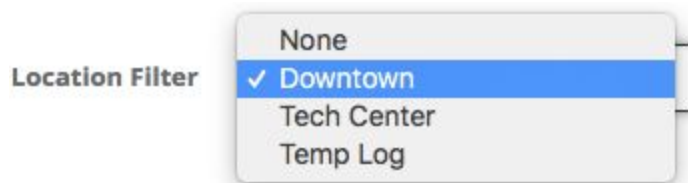
7. Since titles like “Temp Log” are common, you can choose to **Tag** the Question Set with a specific **Location** in order to recognize the specific Temp Log (e.g. Downtown). This assigns a checklist to a specific location.



8. Select **Active** or **Inactive**. (For sets that are in progress of completion, keep them on **Inactive**; for sets that are completed, set them to **Active** so that they are made public.)



9. A **Location Filter** assigns a checklist to a specific location. (Location Filters are built ahead of time to assign checklists to them.) In this example, by selecting **Downtown**, only the people in the Downtown location will be able to see the checklist.



10. If you have an organization that has sub-organizations, select the **Inheritable** box so that all organizations can complete the inspection.



11. You have the option of making the checklist appear daily or weekly by applying a schedule. (This will be explained further later in the manual.)
12. Add a **Schedule** by selecting the +. A Schedule holds people accountable to checklists on daily/weekly/quarterly systems.



13. To add a question, select **+Add Category**. Input a **Category Title**.



14. Then, select **+Add Question**.

15. A variety of options for the question type will appear, such as True/False questions or Number questions. (NOTE: Questions can only be deleted while the question set is being constructed).

16. Once the Question set is complete, select **Create Question Set**.



Edit a Question Set

1. Open the OpsAnalitica app.
2. In the dashboard to the left, select **Admin**, followed by **Question Sets**.
3. Select any Question Set to edit. (In this case, we chose a Line Check Question Set.)

Title	Status	Tags	
BOH	Active		
Closing Checklist	Active	Tech Center	
Cold Item	Active		
EcoLab Chemical Concentration Test	Active		
EcoSure Demo Checklist	Inactive		
EcoSure Self Evaluation	Active		
Facilities Walkthrough Kitchen	Inactive		
Facility Audit	Active		
Grow House - Sample	Inactive		
Line Check	Active	Tech Center	

4. You can always add questions to any question set. To “delete” a question, change its **Status** to **Inactive**.

Instructions

Category Title: Instructions

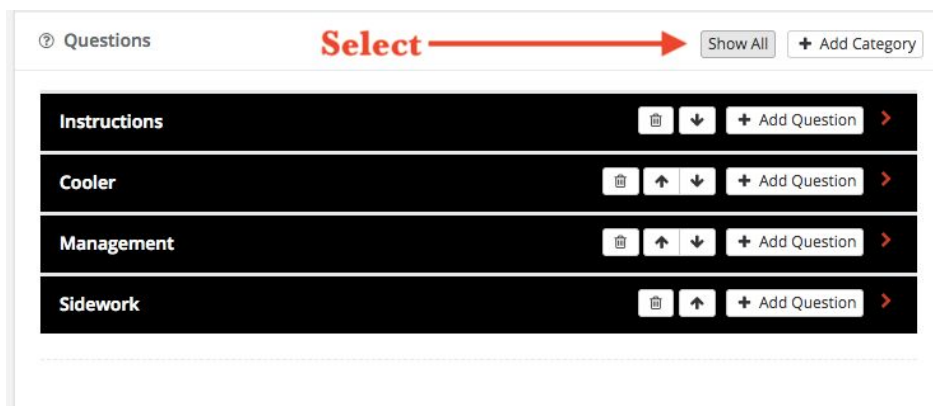
No Response

Question **Help**

Please submit before the beginning of each shift.

Status: **Inactive** (selected), Active

5. By selecting **Show All**, you can view both Active and Inactive questions from the set.



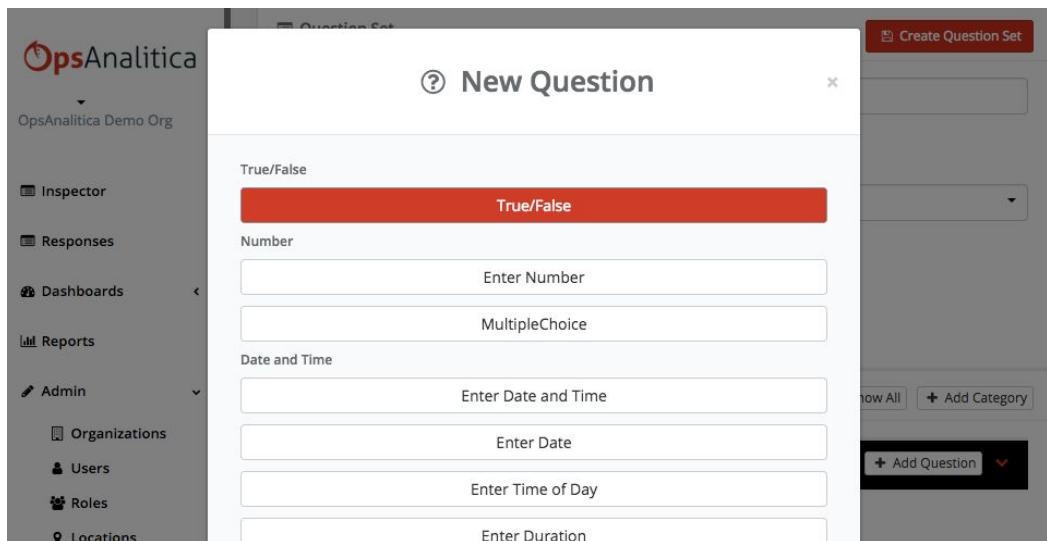
- NOTE: Do not change the meaning of a question when you are editing it. In the system, questions and responses are linked to each other. Therefore, if a question changes, the response will still be linked to the question in the system, but may no longer pertain to it.



True/False Question Type

This is a great question type for checklists and 'Critical Violation' tags.

1. In a question set, select **+Add Category**, followed by **+Add Question**.
2. Add a **True/False** question type.



3. Input your question text. (You can bold, italicize, underline, or add a photo inside the question text.)



4. The **Help** tab allows you to add additional information around the standard information of the questions.
5. Enter the **Possible Score**. (Generally, this number is 1.)

Possible Score

6. Tags are optional. However, the standard tagging process that OpsAnalitica has implemented is that anytime a refrigeration question is asked, it will be tagged with refrigeration, anytime a cold hold question is asked, it will be tagged with cold hold, and anytime there is a hot hold question, it will be tagged with hot hold.
7. Set the **Status** to **Active** or **Inactive**. (The question will not be seen if it is set to **Inactive**.)



Status

8. Add the **Rules** for this question type. The rules below are the ones available for a True/False Question (the ones that have been highlighted are required to distribute points).

- True/False Tag Unsatisfactory If False
- True/False Required
- True/False Require Photo If False
- True/False Require Comment If False
- True/False Give Full Score If True

9. Check the **Allow Null** box if your have required a question to be answered.

Allow Null

10. The **True** and **False** button labels will default as true and false, however you can change them to **Yes** and **No**.

True **False**



Number Enter Number Question Type

1. In a question set, select **+Add Category**, followed by **+Add Question**.
2. Add a **Number Question** question type.
3. The image below shows an **Enter Number Question**.

4. Input a **Title** for the question that corresponds to the questions type. (For example, the image below shows the questions “What is the temperature of the walk-in?” This question is a **Enter Number Question** so that the individual conducting the inspection can easily input the temperature.)

5. Enter the **Possible Score**. (Such as 10.)

6. Add **Tags**. (Such as **Refrigeration**.)

7. Set the **Status** to **Active** or **Inactive**. (The question will not be seen if it is set to **Inactive**.)



Status

8. Add the correct **Rules** to the question.

Select Rules ×

- Number Tag Unsatisfactory If Response is Less Than Possible Score
- Number Set Score Equal to Response
- Number Required
- Number Require Comment If Response is Less Than Possible Score
- Number Hot Hold
- Number Give Full Score for Any Reponse
- Number Freezer Rule
- Number Cold Hold
- Number Beer Rule
- Number AC Rule

9. **Precision** is how many decimal points you would like to show. If this is left blank, it will defeat to zero, which is the most common setting.

Precision

10. For certain questions, you can input a before label, hint label, or after label. (For example, fahrenheit.)

Before Hint After



Number Multiple Choice Question Type

This type of question is similar to the Number Question in that they both store number values. Multiple Choice questions allow you to add buttons with button labels that associate to certain point values.

1. In a question set, select **+Add Category** (if applicable), followed by **+Add Question**.
2. Add a **Multiple Choice** question type.
3. Input your question text. (You can bold, italicize, underline, or add a photo inside the question text.)

Multiple Choice [Number]

Rate the cleanliness of the men's room

4. The **Help** tab allows you to add additional information around the standard information of the questions.
5. Enter the **Possible Score**. (Generally, this number is 4.)

Possible Score

6. **Tags** are optional.

Tags

7. Set the **Status** to **Active** or **Inactive**. (The question will not be seen if it is set to **Inactive**.)

Status

8. **Precision** is how many decimal points you would like to show. If this is left blank, it will default to zero, which is the most common setting.

Precision

9. Select **+Add Choice**. Generally, Multiple Choice questions have four types of choices, but you can add more or less than four.



10. Input the **Label** and **Value** for each choice. You can delete choices, but labels and point values are required for each choice.

11. Select **+Add Rule**. Below are the rule options that will appear.

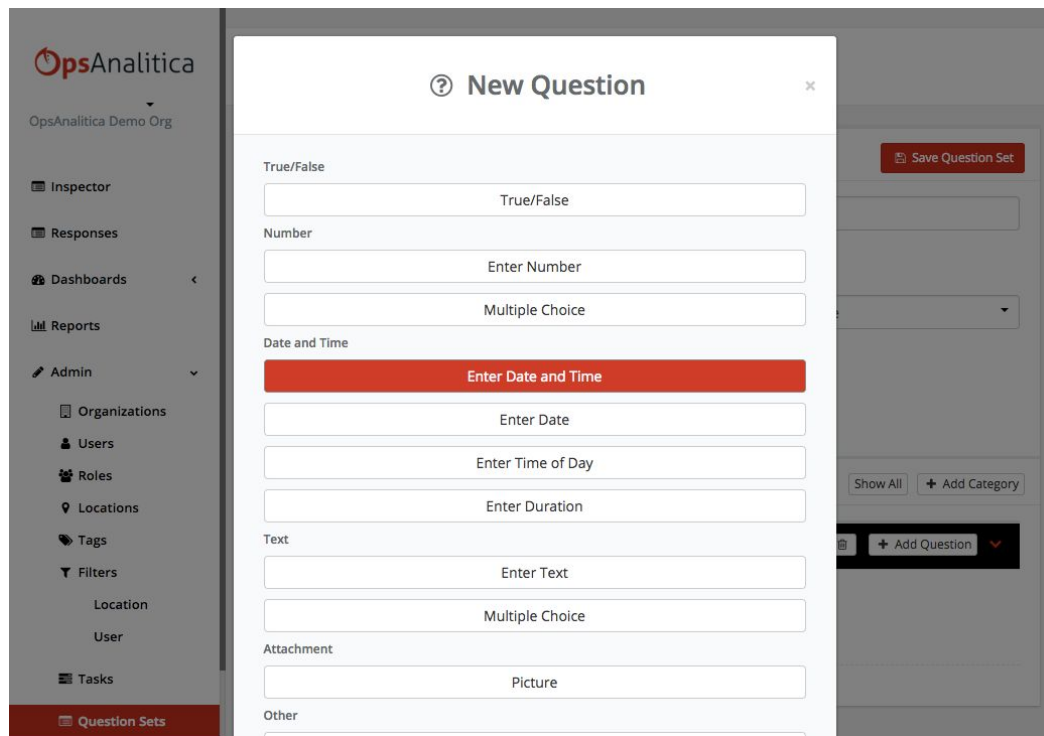
- Number Tab Unsatisfactory If Response is Less Than Possible Score (OPTIONAL)
- Number Set Score Equal to Response (OPTIONAL)
- Number Required (OPTIONAL)
- Number Require Comment If Response is Less Than Possible Score (OPTIONAL)
- Number Hot Hold (N/A)
- Number Give Full Score for Any Response (OPTIONAL)
- Number Freezer Rule (N/A)
- Number Cold Hold (N/A)
- Number Beer Rule (N/A)
- Number AC Rule (N/A)



Enter Date Time Question Type

Creating and editing the Enter Date Time question type.

1. In a question set, select **+Add Category** (if applicable), followed by **+Add Question**.
2. Select the **Enter Date Time** question type.



3. Input **Question Text**, a **Possible Score**, and set the question to **Active**.



4. Add a **Rule**.

- **Date Time Required** - makes the question required for submission
- **Date Time Give Full Score If Not Empty** - rewards points if a date time is selected

5. Additional options for the question include giving **Hints** and labels **Before** and **After** the question.





Enter Text Question Type

This question is for entering free form text. This question type is generally used for entering notes, entering names of inspectors, or any other times there is the need for text.

1. In a question set, select **+Add Category** (if applicable), followed by **+Add Question**.
2. Add an **Enter Text** question type.
3. Input your question text. (You can bold, italicize, underline, or add a photo inside the question text.)

4. The **Help** tab allows you to add additional information around the standard information of the questions.
5. Enter the **Possible Score**. (Generally, this number is 1. However, questions such as ones that ask for names can be set to 0 so that this is no penalty.)

Possible Score

6. **Tags** are optional.

Tags

7. Set the **Status** to **Active** or **Inactive**. (The question will not be seen if it is set to **Inactive**.)

Status

8. Select **+Add Rule**. Below are the rule options that will appear.

- Text Required (OPTIONAL)
- Text Give Full Score If Not Empty (OPTIONAL)

9. Check the **Multi-Line** box if you would like the question to have more than one line. (The default is 1 line.)

Multi-Line



10. Additional options for the question include giving **Hints** and labels **Before** and **After** the question.

Before

Label before

Hint

Hint when empty

After

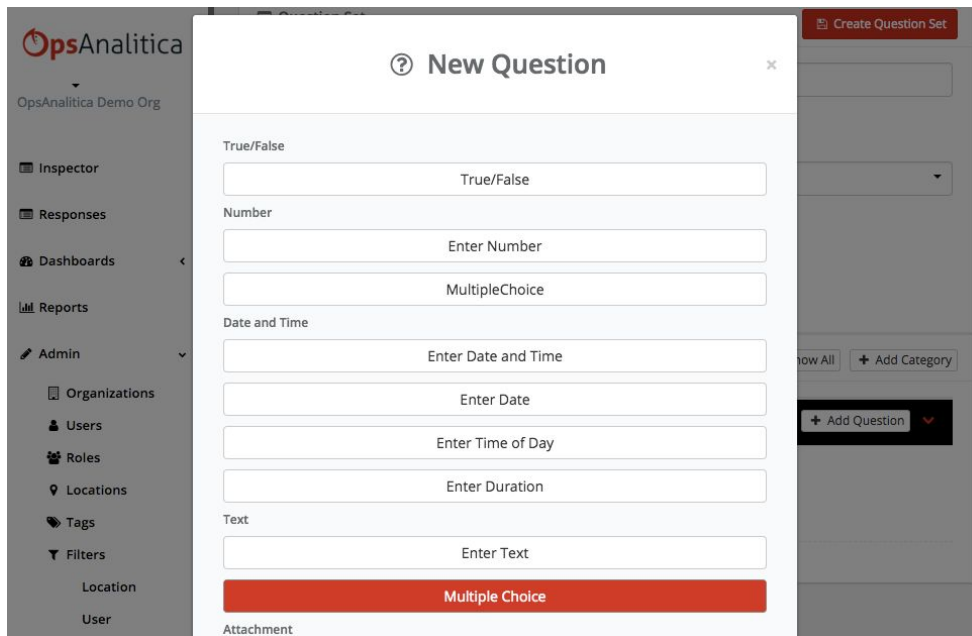
Label after



Text Multiple Choice Question Type

The entered value will be stored as a text, instead of just a number value.

1. In a question set, select **+Add Category** (if applicable), followed by **+Add Question**.
2. Add a **Multiple Choice (Text)** question type. (Note: Do not select the Multiple Choice option under **Number**).



3. Input your question text. (You can bold, italicize, underline, or add a photo inside the question text.)



4. Input the **Possible Score**. (Note: Any answer will get the possible score, unlike the scale on the original numbered value Multiple Choice question.)

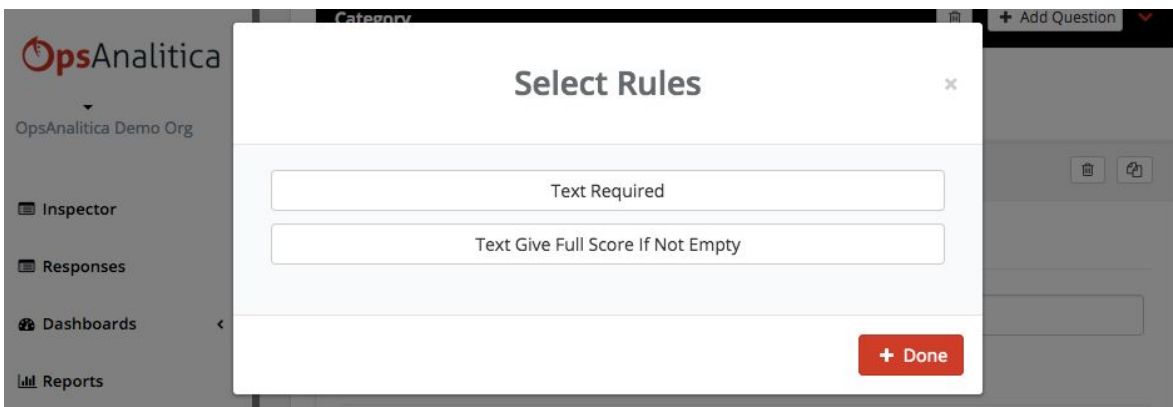
Possible Score

5. Set the **Status** to **Active**.



Status

6. Add a **Rule**.



7. Choose the **Display As** you would like.

Display As Buttons
 Radio Buttons
 Drop Down List

- Buttons - a few choices
- Drop Down List - 5 or 10 choices

8. Select **+Add Choice** to input possible answers for the question.

Choices

Label	Value	
<input type="text"/>	<input type="text" value="Text"/>	<input type="button" value="🗑"/>

User Editable

9. Add different **Labels** and **Values** that correspond to the question (in this case “Rate your service today”).



Choices + Add Choice

Label	<input type="text" value="Great"/>	Value	<input type="text" value="Great"/>	<input type="button" value="↓"/>	<input type="button" value="🗑"/>
User Editable	<input type="checkbox"/>				

Label	<input type="text" value="Okay"/>	Value	<input type="text" value="Okay"/>	<input type="button" value="↑"/>	<input type="button" value="↓"/>	<input type="button" value="🗑"/>
User Editable	<input type="checkbox"/>					

Label	<input type="text" value="Not so good"/>	Value	<input type="text" value="Not so good"/>	<input type="button" value="↑"/>	<input type="button" value="🗑"/>
User Editable	<input type="checkbox"/>				



Picture Question Type

This question allows you to attach up to 5 photos to answer a question.

1. In a question set, select **+Add Category** (if applicable), followed by **+Add Question**.
2. Add a **Picture** question type.
3. Input your question text. (You can bold, italicize, underline, or add a photo inside the question text.)

4. The **Help** tab allows you to add additional information around the standard information of the questions.
5. Enter the **Possible Score**. (Generally, this number is 1. One picture will automatically give full points.)

Possible Score

6. **Tags** are optional.

Tags

7. Set the **Status** to **Active** or **Inactive**. (The question will not be seen if it is set to **Inactive**.)

Status

8. Select **+Add Rule**. Below are the rule options that will appear.
 - Photo Required (OPTIONAL)
 - Photo Give Full Score If Any (OPTIONAL)
9. The **Label** is for the button that shows up on the inspector. Picture questions have a photo button that looks like a camera and this label is what is printed in that button.

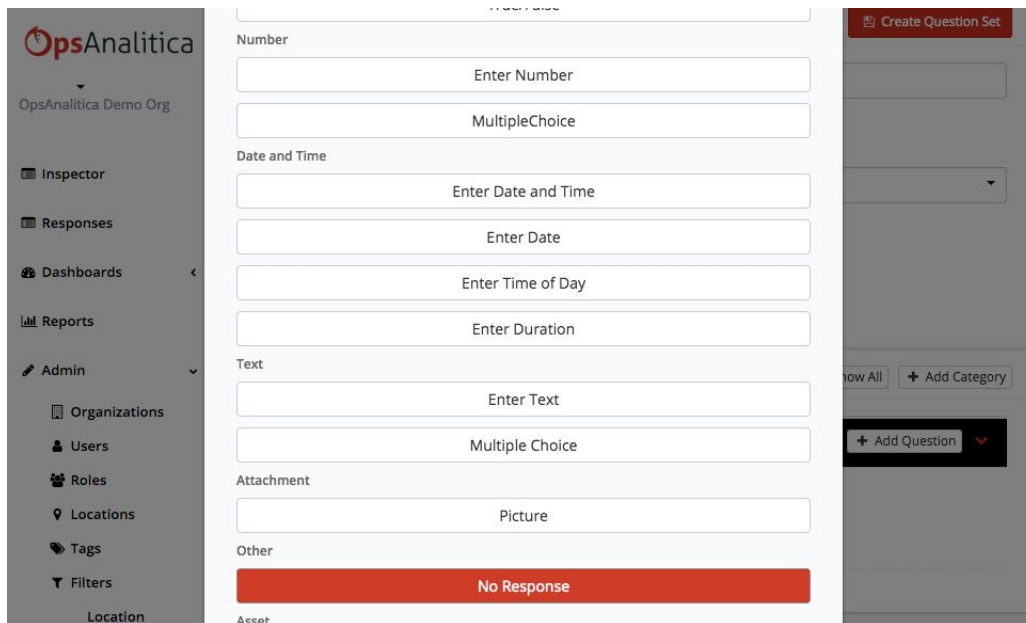
Label



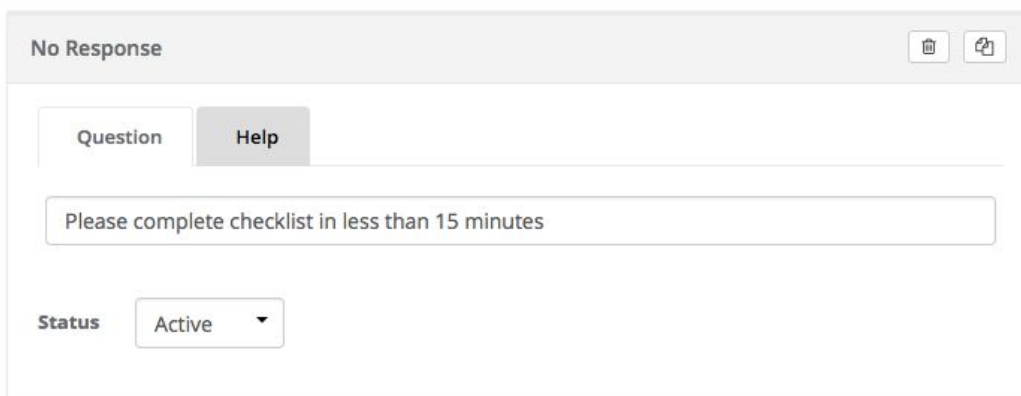
No Response Question Type

A way to put a direction block at the top of a question set or put in extra information.

1. In a question set, select **+Add Category** (if applicable), followed by **+Add Question**.
2. Add a **No Response** question type.



3. Input your question text. (You can bold, italicize, underline, or add a photo inside the question text.)



4. Set the **Status** to **Active**.
5. There is no other configuration necessary for this question type. It is generally used as directions.

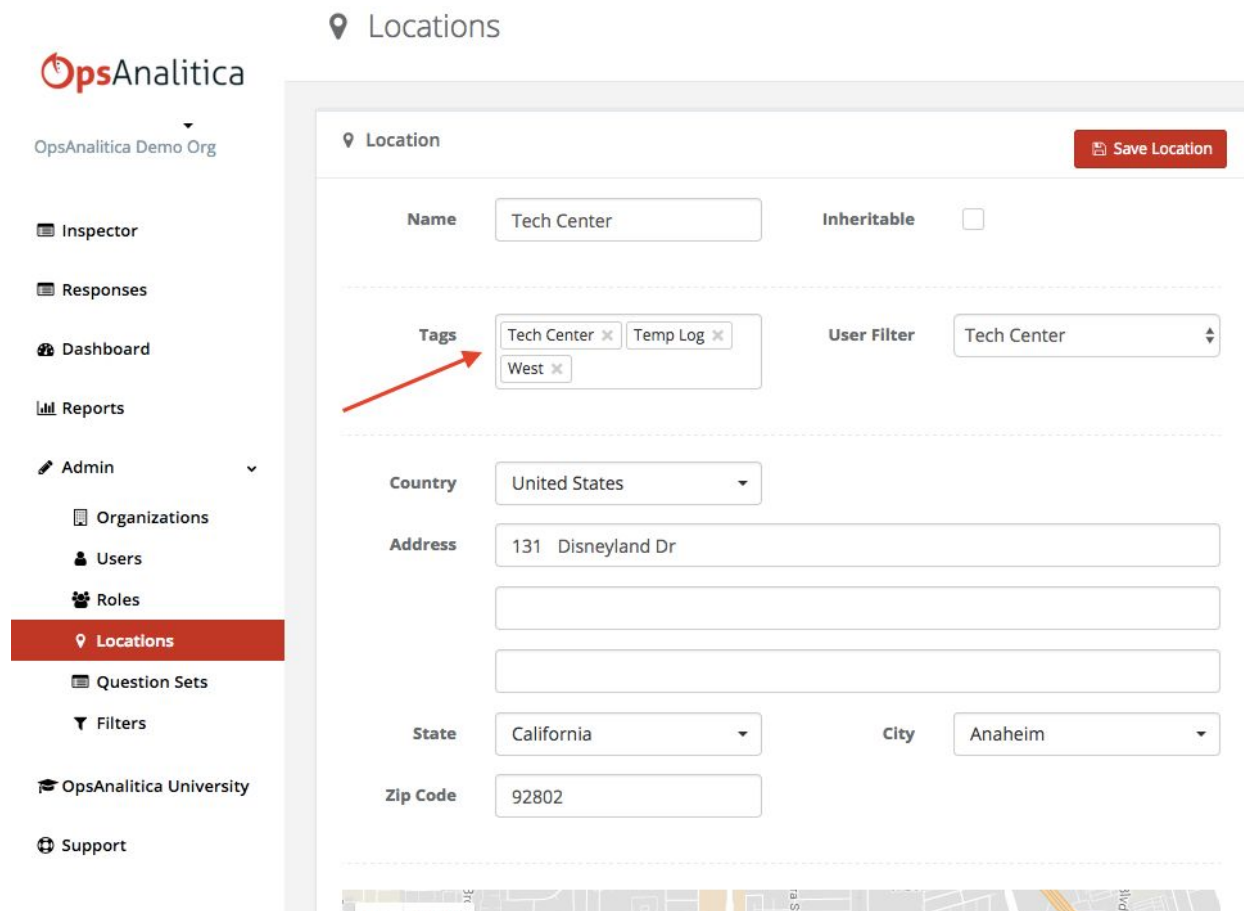


Question Set and User Filtering

Steps on how to configure filtering for inspections and users to cut-down clutter and make finding checklists simpler. It is highly recommended that you open up a support ticket to have a conversation about your tagging strategy.

Question Set Filtering

1. Open the OpsAnalitica app.
2. Select the dropdown menu for **Admin**, followed by **Locations**.
3. Select a location. (Disneyland as Tech Center will be used as an example.)
4. To build a filter, you must begin by creating the tags first. The image below shows three tags attached to the Tech Center location. (Note: The **Tag** box is where you can create additional tags.)



- Tag #1: Tech Center
This tag has the same name as the location in order for specific checklists to only be assigned to this specific location.
- Tag #2: Temp Log



This tag represents specific checklists.

- Tag #3: West

This tag represents a person's role or territory (in this case, Area Manager).

5. Once you have applied all the tags to a location, select **Save Location**.
6. In the **Admin** dropdown menu, select **Filters**.
7. Select the correct filter (in this case, **Tech Center**).

Filters

+ New Filter

Type Location

Name

Downtown

Tech Center

Temp Log

8. Input a name that corresponds to the location and tags you applied previously. The location should correspond as well.

Filters

Filter

Save Filter

Name Tech Center Inheritable

Location Tagged With Tech Center

+

9. Select **Save Filter**.



10. For questions set to location filter, you assign the filter on the question set. In the **Admin** dropdown menu, select **Question Sets**.
11. Select the correct question set.
12. Apply the **Location Filter**.

The screenshot displays the 'Question Sets' configuration interface. The sidebar on the left lists various system components, with 'Question Sets' highlighted in red. The main panel shows the configuration for a question set titled 'Line Check - Tech Center'. Key settings include: Status: Active; Schedule: Daily; Inheritable: checked; Location Filter: Tech Center (indicated by a red arrow). Below the main settings, there are two rows for scheduling: 'AM Line Check' from 10:00 AM to 11:30 AM, and 'PM Line Check' from 02:00 PM to 05:00 PM. At the bottom, there are sections for 'Cooler' and 'Management' with 'Add Question' buttons.

Since this concept can be a little confusing, here's a summary of what we just did:

First step, we created a tag. Second step, we created the filter. Third step, we linked the checklist to the location in the checklist.

In the examples above, we created a tag that said **Tech Center** for the tech center location, then created a filter called **Tech Center**, which linked the tag to a location filter. Finally, we went to a question set and selected a location filter that was called **Tech Center** and connected them all together.



User Filter

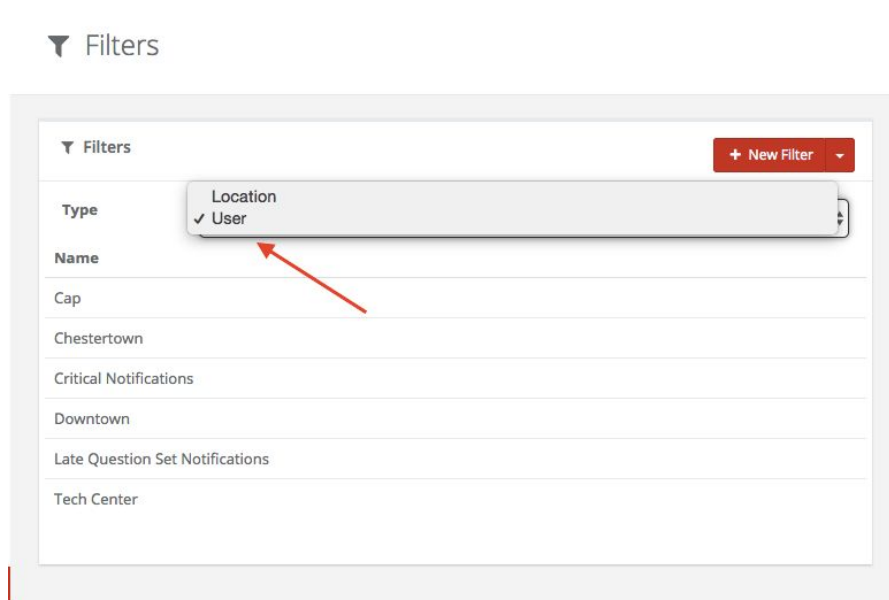
1. In the **Admin** dropdown menu, select **Users**.
2. Select a user (in this example, we will be using John Smith, the GM of our Downtown location).

The screenshot shows the OpsAnalitica user management interface. On the left, the 'Admin' menu is expanded, and 'Users' is selected. The main content area displays a 'User' form for John Smith, GM of Downtown. The form includes the following fields and values:

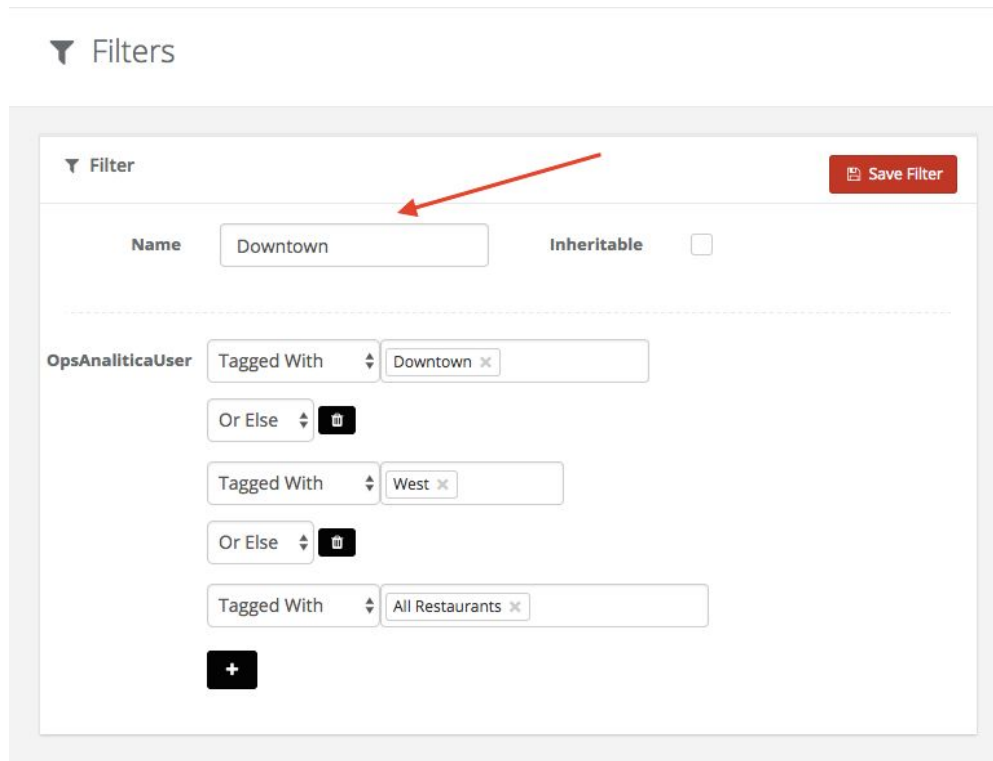
Field	Value
Title	GM of Downtown
Status	Active
First Name	John
Last Name	Smith
Email	Demo@opsanalitica.com
Mobile	
Tags	Downtown
Password
Confirm Password

Buttons for 'Log Out User' and 'Save User' are located at the top right of the form.

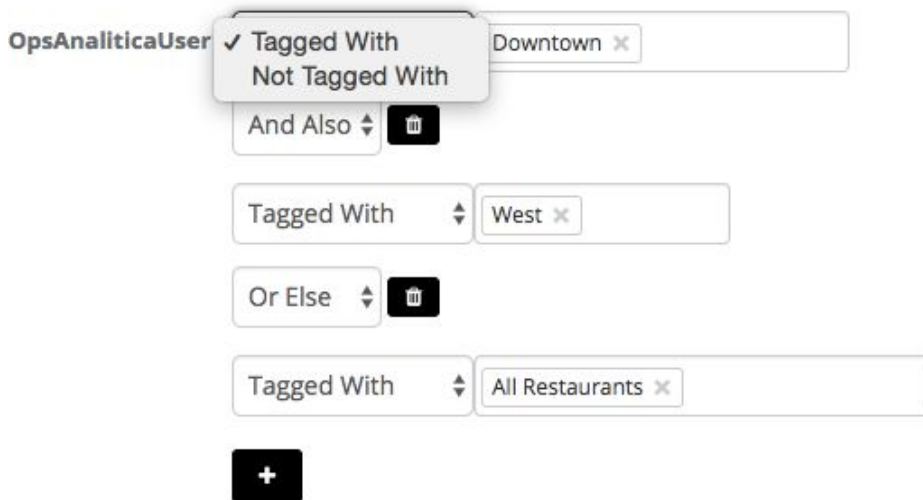
3. The tag **Downtown** has been applied to this user because he is the GM of Downtown and will therefore be assigned to the Downtown location.
4. After applying tags, select **Save User**.
5. In the **Admin** dropdown menu, select **Filters**.
6. Change the Filter type to **User**.



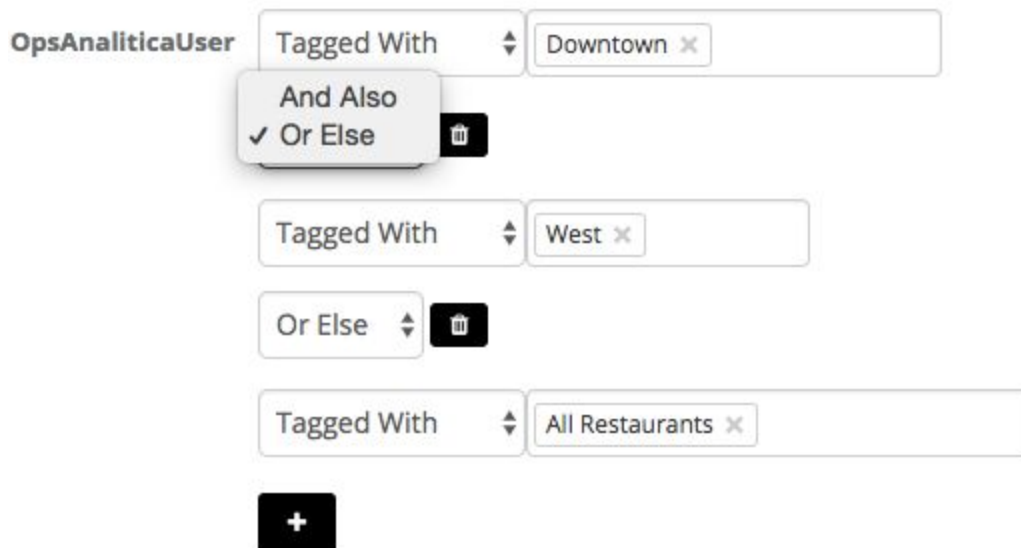
7. Then, select the filter that corresponds with the location you have linked the user to. (In this case, John Smith has been linked to Downtown.)



8. The OpsAnaliticaUser can be **Tagged With** or **Tagged Without**.



9. Tagging it with **And Also** means you have tagged the user with both places (in this case Downtown and West) and the user must have access to both. Tagging with **Or Else** means that they have been tagged with either or, not necessarily with both.



10. The user can also be tagged **And Also** or **Or Else** to other places by clicking the + sign to add a location (such as All Restaurants).
11. After you have finished tagging the user, select **Save Filter**.
12. In the **Admin** dropdown menu, select **Locations**.
13. Select the corresponding Location.
14. The Downtown location can now be filtered by user.



📍 Locations

📍 Location Save Location

Name **Inheritable**

Tags **User Filter**

- Cap
- Chestertown
- Critical Notifications
- ✓ Downtown
- Late Question Set Notifications
- Tech Center

Country

Address

State **City**

Zip Code

15. The location must also be tagged by the same tags you used for the user.

Tags

16. Select **Save Location**. The filter will now look for locations with those specific tags and the John Smith user will only see the Downtown location.





Task-List Scheduler

This is a feature that makes it easier to complete all the everyday checklists due at a specific time.

Setting Up a Daily Schedule

1. Open the OpsAnalitica app.
2. In the **Admin** dropdown menu, select **Question Sets**.
3. Select a checklist. (In this example, we will be using Facilities Walkthrough Kitchen.)
4. Set the checklist Schedule to **Daily**. (Now, this checklist will automatically appear once a day.)

The screenshot shows the 'Question Sets' configuration interface. The 'Question Set Title' is 'Facilities Walkthrough Kitcher', 'Status' is 'Inactive', and 'Location Filter' is 'Temp Log'. The 'Schedule' dropdown menu is open, showing 'Daily' selected with a red arrow. Below the schedule dropdown, there are fields for 'Name' (Test schedule), 'From' (08:40 AM), and 'To' (08:45 AM). The page also shows a list of question sets: 'Kitchen Dumpster Area' and 'Walk-in Cooler', each with a '+ Add Question' button.

5. In order for the checklist to appear more than once a day, select the + **sign**. You can select the times for the checklist to appear. (The example below shows the checklist appearing twice a day, once in the morning and once in the afternoon.)



Question Sets

Question Set

Save Question Set

Question Set Title: Facilities Walkthrough Kitcher

Inheritable:

Status: Inactive

Location Filter: Temp Log

Schedule: Daily

Name	From	To
Morning	08:00 AM	09:00 AM
Afternoon	04:00 AM	05:00 AM

+ -

- By clicking on **Inspector** in the left hand dashboard, you can view the daily schedule you have configured.

OpsAnalitica

OpsAnalitica Demo Org

Inspector

Location: Downtown

131 Disneyland Dr, Anaheim, California

Schedule

10:00 PM Closing

Temp Log

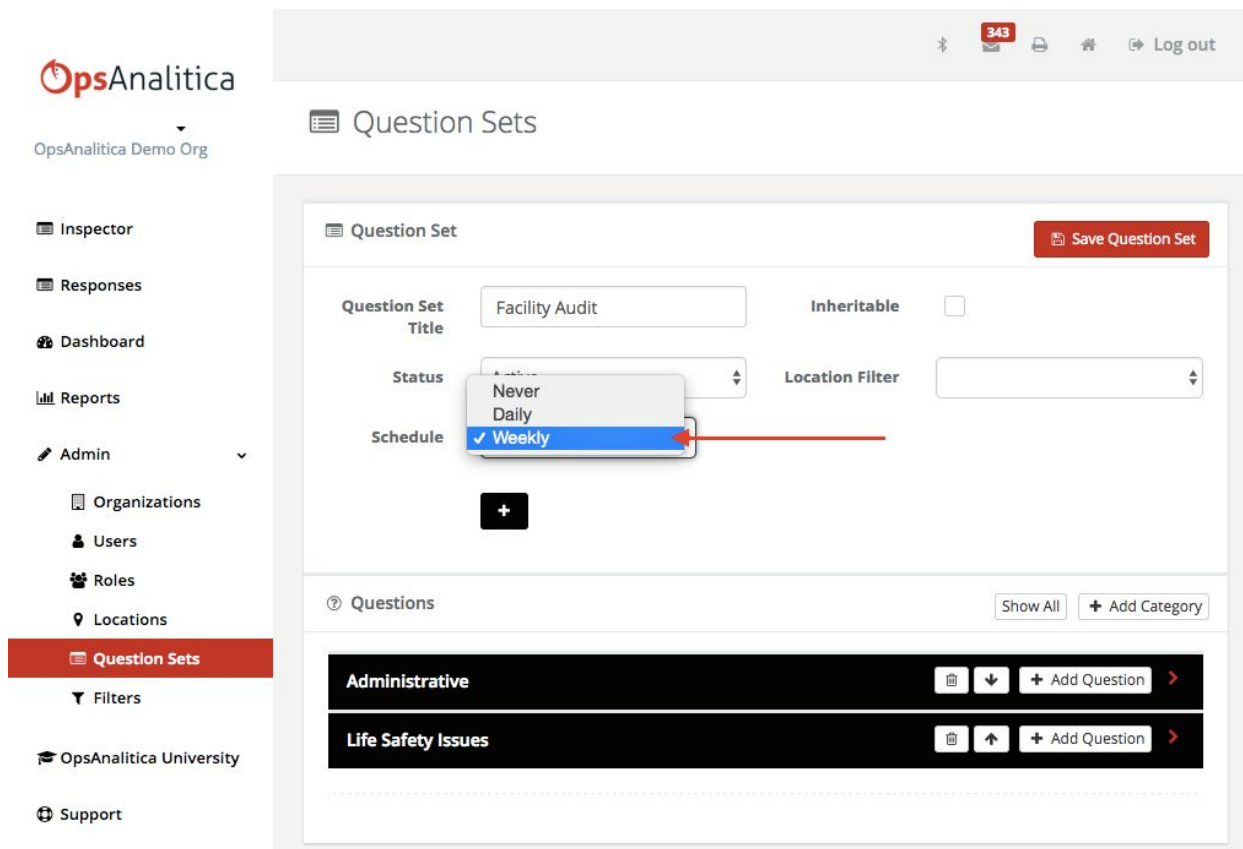
Closing Walk-through

Closing Checklist

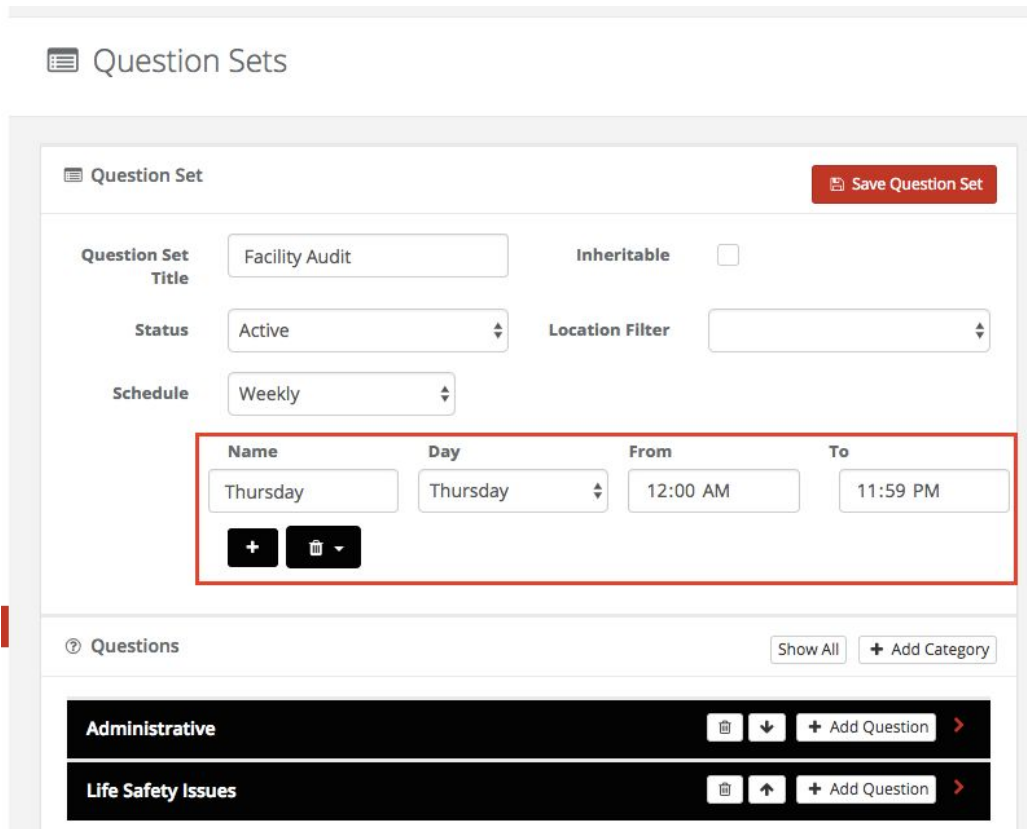


Setting Up a Weekly Schedule

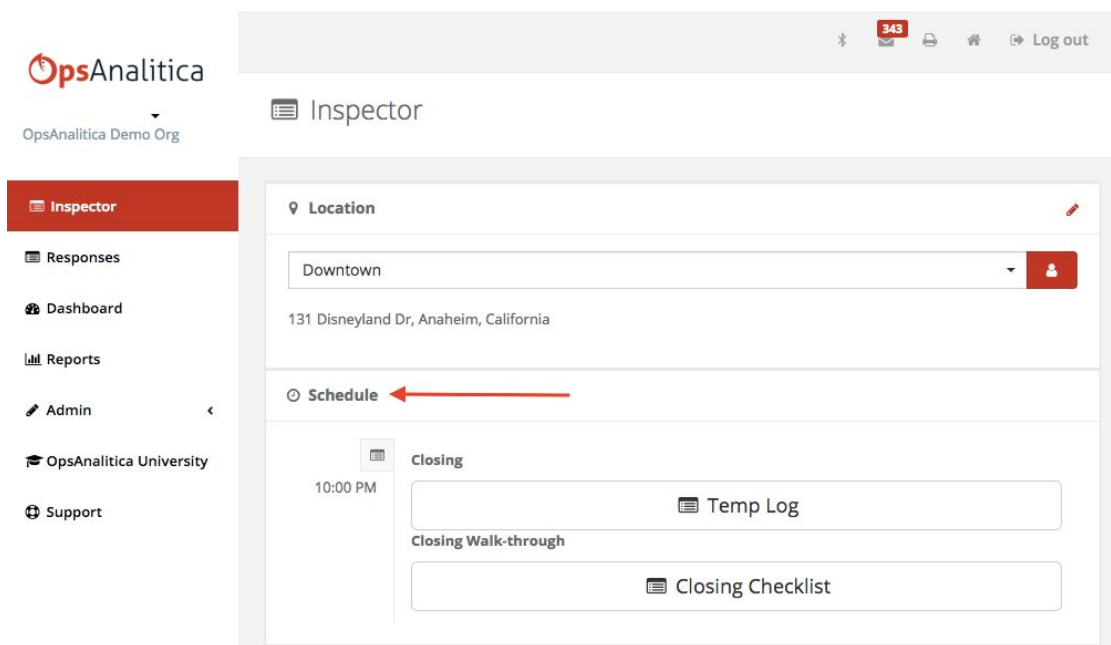
1. Open the OpsAnalitica app.
2. In the **Admin** dropdown menu, select **Question Sets**.
3. Select a checklist. (In this example, we will be using Facility Audit.)
4. Set the checklist Schedule to **Weekly**. (Now, this checklist will automatically appear once a week.)



5. In order for the checklist to appear once a week, select the **+** sign. You can select the times for the checklist to appear. (The example below shows the checklist appearing on Thursdays.)



- By clicking on **Inspector** in the left hand dashboard, you can view the weekly schedule you have configured.



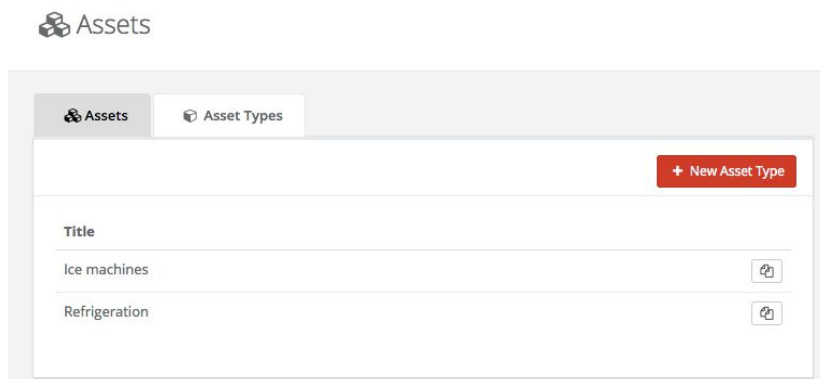
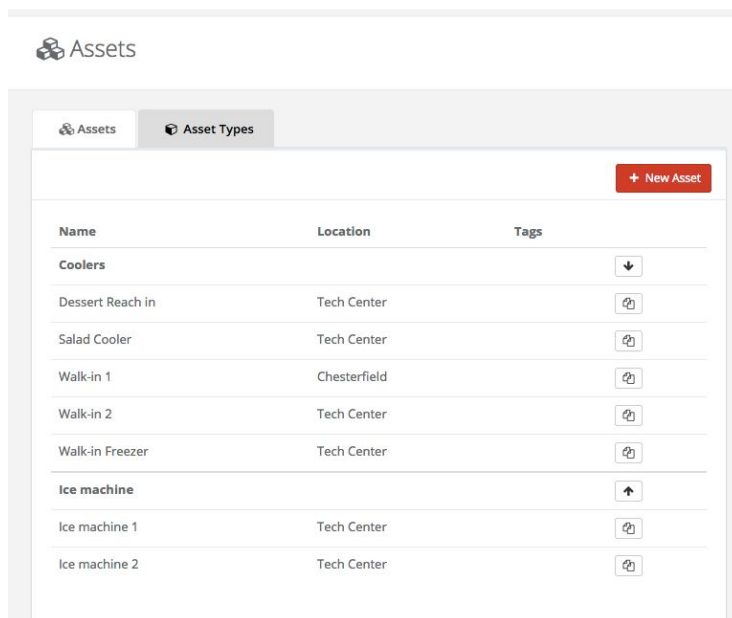


Asset Module

| Asset Mgt Overview |

Users are able to create assets within the system and track maintenance on individual items and not just locations.

1. Open the OpsAnalitica app.
2. From the left side dashboard, select **Assets**.
3. The Assets platform is separated into Assets and Asset Types.

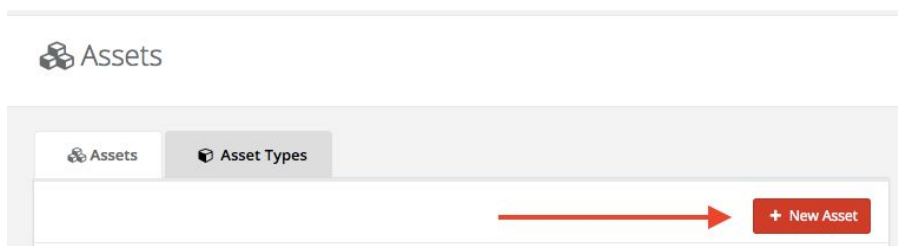




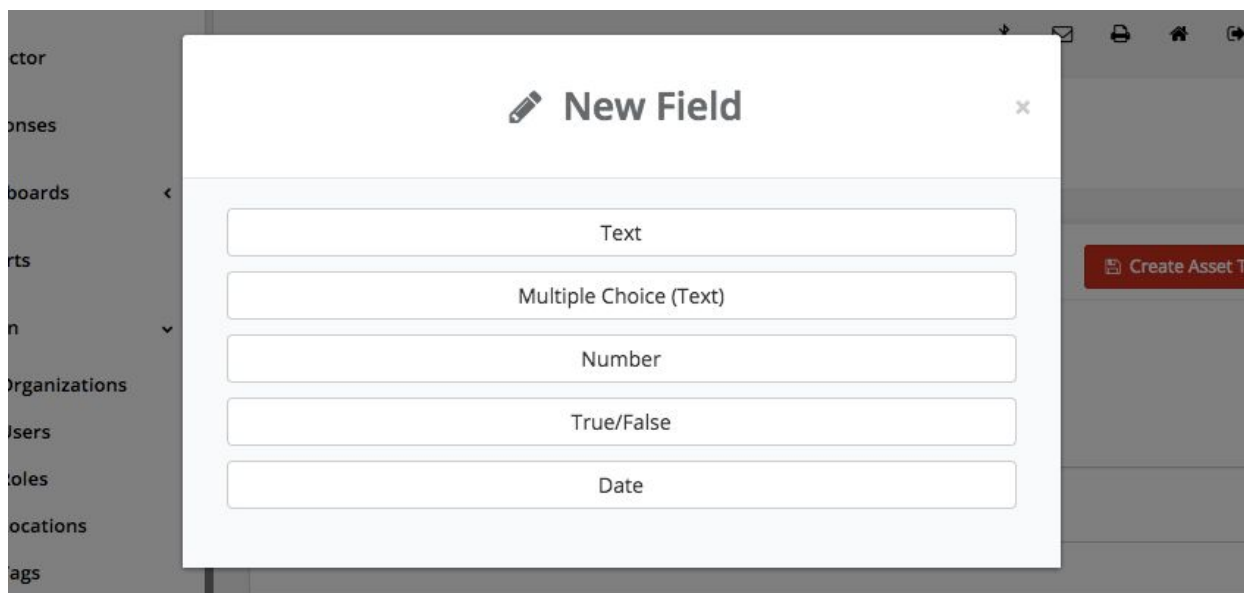
| Create an Asset Type |

Review of how to create an asset.

1. Open the OpsAnalitica app.
2. From the left side dashboard, select **Assets**.
3. Select **+New Asset**.



4. Input a **Name** (e.g. Ice Machines) and **Description** (e.g. Any machine that produces ice) and set the asset to **Active**.
5. Add a **Field** - essentially a question - and select whether is it required or not.
6. Once all desired fields are inputted, select **Create Asset Type**.





| Create an Asset |

1. Open the OpsAnalitica app.
2. From the left side dashboard, select **Assets**.
3. Next, you can input a **Description**, **Location**, **Serial Number**, **Condition**, **Purchase Date**, **Warranty Expiration Date**, **Attachments** and more.

The screenshot shows the 'Create Asset' form with the following fields and values:

- Category:** Ice machine
- Name:** Ice Machine
- Description:** (Empty text area)
- Location:** (Empty dropdown menu)
- Inheritable:**
- Attachments:** Add Photo button
- Tags:** Select tags...
- Serial#:** R78394
- Condition:** Great
- Purchase Date:** 09/04/2018
- Warranty Expiration Date:** 09/11/2018
- Location:** (Empty text field)

4. Select **Create Asset**.
5. From the **Inspector** platform, you have the option of selecting a checklist and then adding an asset or creating a new asset.

The screenshot shows the 'Request' form with the following elements:

- Request** (Section header)
- Choose piece of equipment** (Section header)
- Search input field
- + New Asset** (Red button)

