# i-Reporter manual document

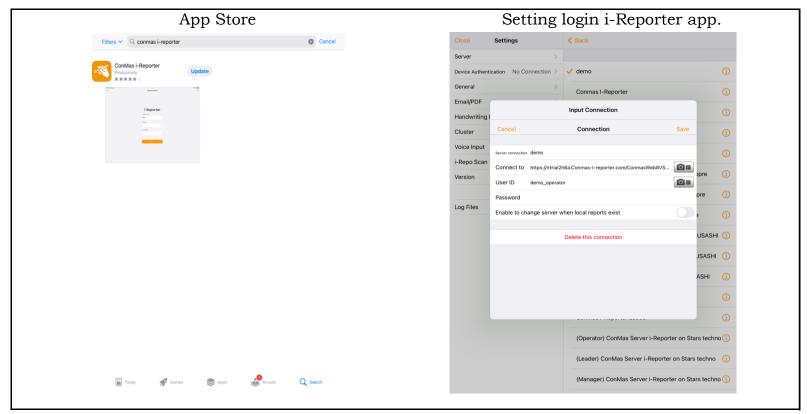
- 1. Setting i-Reporter for Window and i-Pad app., ConMas Designer app.
- 2. Setting users/groups manager (System menu)
- 3. Creating address for forms and documents (Labels menu)
- 4. Creating forms document
  - 4-1. Creating forms document on Excel file
  - 4-2. Creating forms document on ConMas Designer app.
- 5. Selecting address for forms and documents Document permission setting, Document visibility permission (Forms menu)
- 6. Setting approved (System menu)
- 7. Locking signature fields for individuals by group (Forms menu)
- 8. Custom menu
- 9. Library menu
- 10. Schedule menu

# 1. Setting i-Reporter for Window and i-Pad app, ConMas Designer app

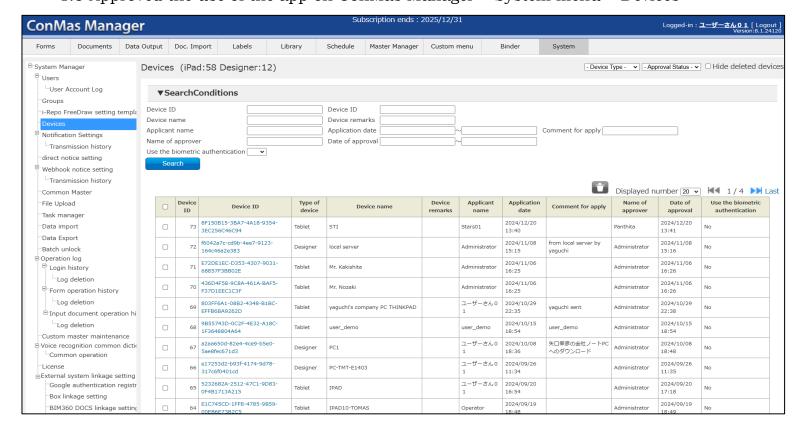
1.1 Download i-Reporter for Windows app. And ConMas Designer app. On Website: https://cimtops-support.com/i-Reporter/en/dl-software-en and login



1.2 Download i-Reporter app. in App Store on i-Pad And and login

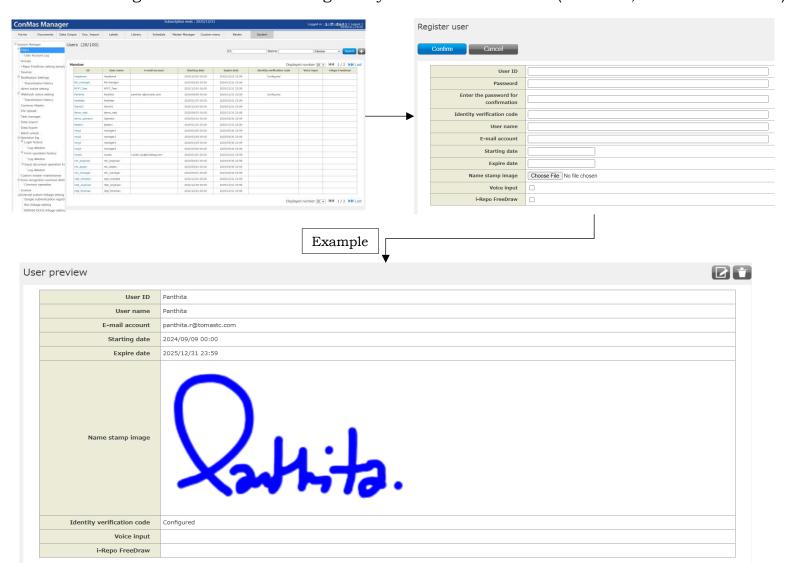


1.3 Approved the use of the app on ConMas Manager > System menu > Devices

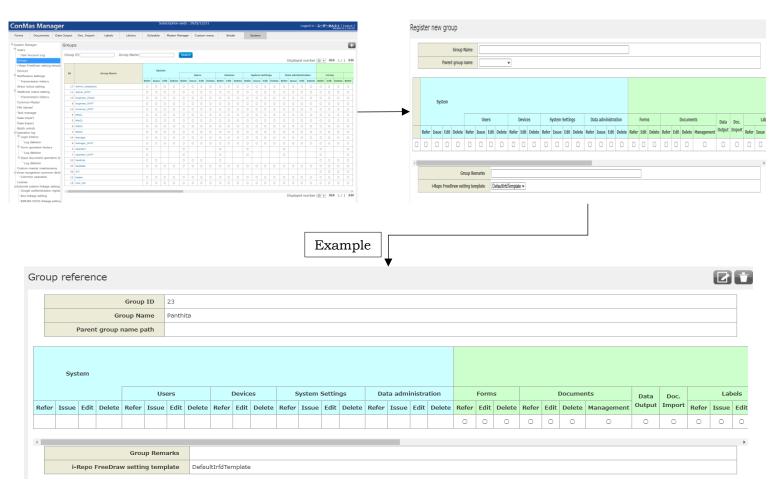


# 2. Setting users/groups manager (System menu)

2.1 Setting user on ConMas Manager > System menu > Users > (add user, edit or delete user)

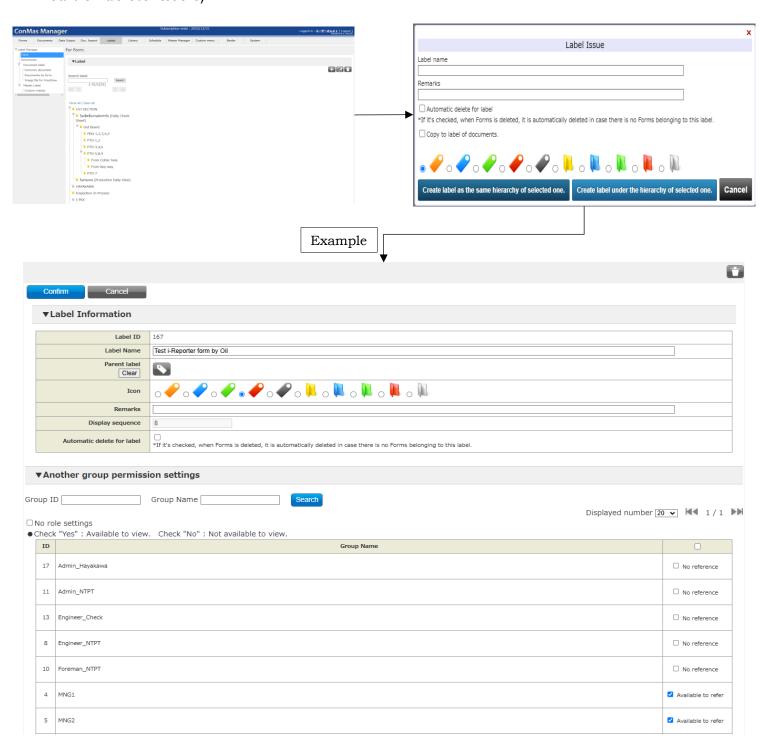


2.2 Setting groups on ConMas Manager > System menu > Groups > (add groups, edit or delete groups)

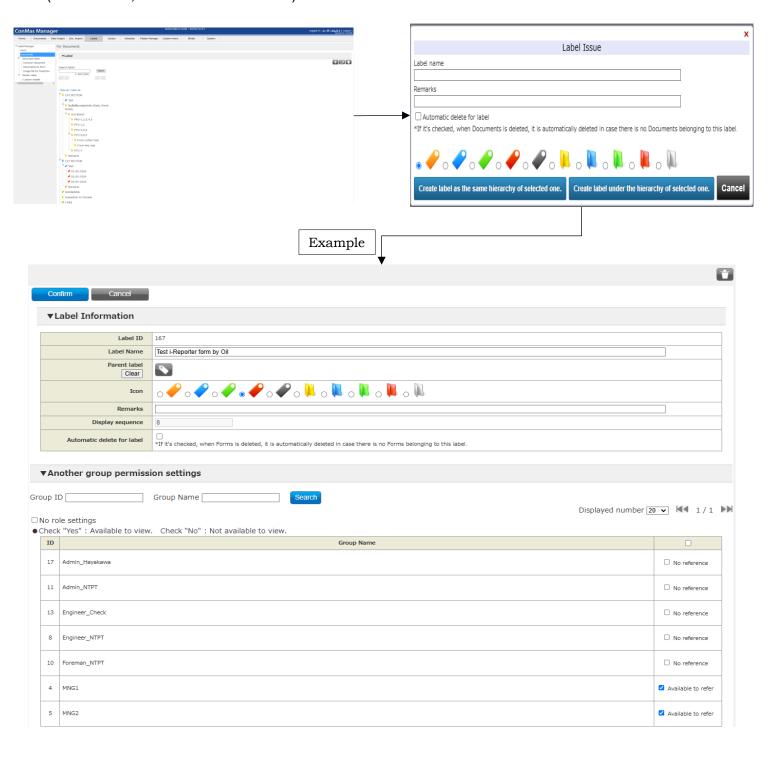


# 3. Creating address for forms and documents (Labels menu)

3.1 Creating address for forms on ConMas Manager > Labels menu > Form (add labels, edit or delete labels)

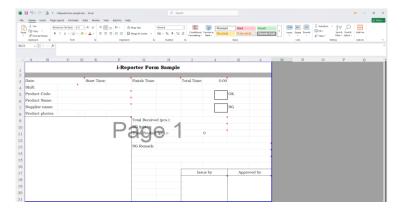


3.2 Creating address for documents on ConMas Manager > Labels menu > Document (add labels, edit or delete labels)

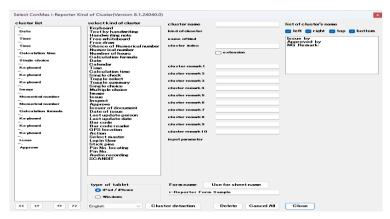


# 4. Creating forms document

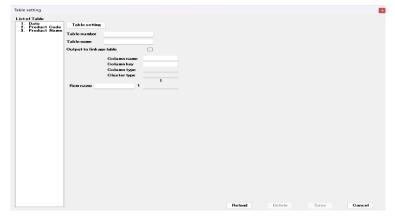
4.1 Creating a document forms on Excel file (document page layout and inserting various clusters, including setting up table(some forms document))



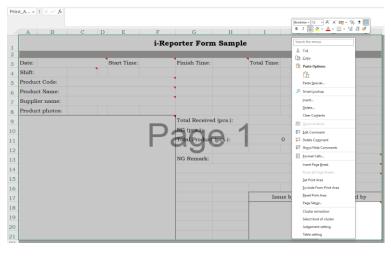
Create a document forms on Excel file.



Add each type of cluster according to its application.



Setting table (some forms document) (The report data is automatically outputted to a dedicated table. (Two types are available)
In case of the form having tabular style, a table data is created for each setting table.
It will make more easy to be referred from external system such as BI tool.
The table data can be referenced via ConMas Manager and API \* via the reference view, and also CSV output can be performed.)



Cover the document form area and then select 'Set Print Area' and save document forms.

# **Cluster Type**

Keyboard

You can enter characters from the software keyboard of your tablet or an external input device such as a keyboard or barcode reader.

It is a cluster that can be linked with external systems.

## Text by handwriting

In order to use the function of this cluster, iPad App. "7notes Pad+WC" (provided by MetaMoji, annual amount usage 3,000 yen) needs to be installed in iPad.

If "7notes Pad + WC" is installed, start "7notes Pad + WC" by linking between apps, convert handwritten characters to text, and confirm, the text will be displayed in the corresponding cluster of i-Reporter. It will be entered.

If "7notes Pad + WC" is not installed, normal keyboard text input will be used.

It is a cluster that can be linked with external systems.

#### Handwriting note

You can input multiple lines by handwriting. No text conversion is performed, and the entered content is input as it is as an image.

#### Free white board

In addition to freehand drawing, you can call the camera and paste the image of the camera roll by pressing and holding the cluster. No text conversion is done and the entry is saved as an image.

It is a cluster that can be linked with external systems.

#### Free draw

A high-performance drawing tool with a dedicated editing screen.

It is a cluster that can be linked with external systems.

#### Choice of Numerical number

You can create a list (or counter) of numbers in a specified range at regular intervals.

It is a cluster that can be linked with external systems.

# Numerical number keyboard

You can enter numerical values with the numeric keypad.

It is a cluster that can be linked with external systems.

#### Number of hours

Available to input length of time, such as "260 minutes", "36 hours 15 minutes".

External system coordination is possible.

## Calculation formula

You can use operations for clusters with numerical values and Excel functions when importing Excel.

#### Date

You can enter the date from the list.

It is a cluster that can be linked with external systems.

## Calendar

You can select and enter the date with the calendar-type picker. The parameters are the same as for the date cluster.

It is a cluster that can be linked with external systems.

## Time

You can se linked with external systems.

### Time calculation

Specify two time clusters and calculate the elapsed time in minutes for less than 24 hours (1439 minutes or less).

Calculations that span days are also possible. It is a cluster that can be linked with external systems.

## Single check

You can click the "check mark" or "circle" that can be used in checklists. It is a cluster that can be linked with external systems.

## Toggle select

Each time you click multiple character strings, they are switched and displayed. You can set the label character string for display and the numerical value for internal calculation.

It is a cluster that can be linked with external systems.

# Toggle summary

You can aggregate the Toggle select values on a group-by-group basis. There are two methods of aggregation: "Calculation of total score" by choice and "Summary count (Full points)" that displays the perfect score for the entire group.

## Single choice

You can select one item from the list. It is a cluster that can be linked with external systems.

The items in the list consist of a "Label" for display, a "Value" used for system linkage, and a "Default" specified for the initial display.

## Multiple choice

Select multiple items from the list. External system coordination is possible.

The items in the list consist of a "Label" for display, a "Value" used for system linkage, and a "Default" specified for the initial display.

Parameter is same as "Single choice" cluster.

## Image

Insert the image taken by the camera or the image in the terminal.

The size of the image is reduced to fit in the cluster frame. It is a cluster that can be linked with external systems.

#### Issuer

It is mainly used to fill in the Signature Image and Sign of the person in charge. When you c be displayed.

#### Inspector

It is mainly used to fill in the Signature Image and Sign of the person in charge.

When you click the Inspector cluster in the app, a pop-up will display the logged-in user information, comment, Signature Image or Sign entry field, and when you register, the Signature Image or Sign will be displayed.

# Approver

Applies can be made by workers and approvals can be made by superiors and managers. When applying, click the cluster to display the logged-in user information, comment entry field, and apply button. After applying, a user with approval authority can click the cluster to approve or reject.

Once rejected, you will be able to apply again.

Approval authority is set in Manager.

#### Issuer of document

Create a document and display the user who originally saved it on the server.

It is automatically entered and cannot be edited.

#### Date of issue

Creates a document and displays the date it was originally saved on the server.

It is automatically entered and cannot be edited.

# Last update person

Edit the document and display the user who last saved it on the server.

It is automatically entered and cannot be edited.

#### Last update date

Edit the document and display the date it was last saved on the server.

It is automatically entered and cannot be edited.

#### Bar code

Click to scan the barcode (or QR code) using the camera of your iOS device or an external reading device and enter the text. It is a cluster that can be linked with external

#### Barcode reader

When clicked in the app, the software keyboard is not displayed and only input from external devices is accepted.

It is a cluster that can be linked with external systems.

## **GPS** location

Records the latitude and longitude information of your current location when saving. To use GPS location information, enable location services and allow it to be used in the app.

You can configure your iOS location services in Settings> Privacy> Location Services.

#### Action

Action clusters, unlike other clusters, are buttons on your app to perform specific actions. Action type

## 1) Jump to Reference document

Opens the specified file. It is necessary to register for Library management in Manager in advance.

#### 2) Sheet Jump

When you click the cluster in the app, it will move to the specified sheet. You cannot specify the same sheet as the cluster itself. Also, it cannot be used for document with only one sheet.

## 3) Server connecting menu

You can specify one item of "Server connecting menu" of the application and place it as a shortcut.

If "Use for Windows app. Version." Is checked, only the menus available for Windows apps will be displayed.

#### Available server send menu

iOS App. (iPad/iPhone)	Windows App.
Save to iPad local storage	Save to Windows local storage
Save to server and keep editing	Save to server and keep editing
Save to server and finish editing	Save to server (Editing)
Save to server (Complete)	Save to server (Complete)
Save to server and finish editing (continue)	Save to server and finish editing (continue)
Save to server as completion (continue)	Save to server as completion (continue)
Send with JPEG	Not available.
Send mail with PDF	Not available.
Open as PDF	Not available.
Print page	Print page
Not available.	Save as PDF
Not available.	Save as EXCEL
Receipt printing	Receipt printing
Save to iPad local storage	Not available.

# 4) Sheet copy

When you click the cluster in the app, the specified number of sheets will be copied. The copy destination is immediately after the sheet where the cluster is located, and the input values can be copied at the same time.

#### 5) Display non-required mark

When you click a cluster in the app, the "no entry required mark" specified in the Forms information settings will be displayed on the target cluster.

## 6) Open URL

Opens the specified URL. In addition to opening in the safari browser, it also supports custom URL schemes, so you can launch another iOS app.

#### 7) Execute external application

Executes the external program specified by the command.

# 8) Export data (Text)

The text set in advance on Designer is output to the specified file path. Some cluster values and document information can be output as text. The output destination of the file is fixed and will be in the following folder.

Output destination: C: ¥ Users ¥ (user name) ¥ AppData ¥ Roaming ¥ CIMTOPS ¥ ConMas i-Reporter for Windows ¥ output destination ("(User name)" is the name of the user logged in to Windows)

(Also, please note that "AppData" is a hidden folder.)

## 9) Automatic input

The configuration file prepared in advance in the local environment is read, and the value described in the configuration file is automatically input to the specified cluster.

# 10) Back to main screen

You can do the same thing in the Action cluster as the "Back to main screen" icon.

## 11) Gateway linkage

This is the action type used to link the Gateway. Please refer to the attached ConMas Gateway Manual and ConMas IoT Manual for how to link ConMas Gateway / ConMas IoT.

Also, from Ver.8.0.21050, only when the action type is set to Gateway linkage, it is possible to set "Focus on the cluster Start up as input wait state." even if it is an action cluster.

12) Start timer it is used as a set with the schedule time of the action type. Gateway linkage".

> When the timer is started, the timer mode is set, and no document editing is possible until the timer mode is canceled.

In this state, when the time set in the schedule time of "Gateway linkage" is reached, the corresponding "Gateway linkage" is automatically executed.

If the network is set to operate during the timer mode, the operation of the network function is not guaranteed

# 13) QR code generation

This is an action type that generates a QR code by using the Calculation formula cluster of the reference destination and the Image cluster of the output destination together.

Set the three clusters of Action cluster, Calculation formula cluster, and Image cluster set in "QR code generation" as one set.

## 14) Biometric authentication

This is an iOS version limited function. Click to ask for biometrics. When used in combination with the network settings, it can be set to allow input of subsequent clusters of the network if biometric authentication is successful.

#### 15) Batch clear

It is a function to clear all the input values of the cluster registered in advance by Clicking the Action cluster.

#### Select master

You can specify the custom master registered in Manager and the fields to be referenced from it, and enter values for multiple associated clusters at once.

## Log-in user

Enter the user name or user ID that is currently logged in to the app.

## Stick pins

It will be the area to hit the pin on the app. Only one can be placed in the entire document.

It is a cluster that can be linked with external systems.

## Pin No. locating

It works with the pinning cluster and displays the number of the pin hit by the pinning cluster.

#### Pin No.

The pin No. in the pinning table is displayed.

## Audio recording

Click to record up to the specified maximum recording time, and after recording, click to play, delete or rerecord the recorded data.

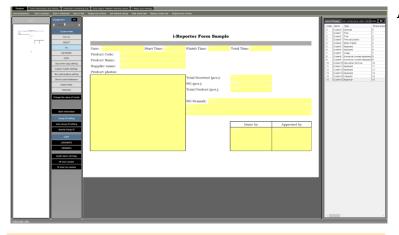
SCANDIT cluster is a dedicated cluster for use with i-Repo Scan.

i-Repo Scan is an optional function of i-Reporter and requires a separate i-Reporter contract in addition to the i-Repo Scan license.

## 4.2 Creating forms document on ConMas Designer app.



Select to create a forms document an existing file.



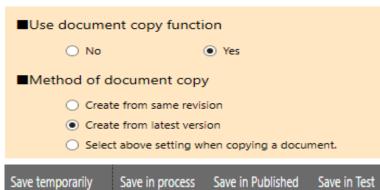
Additional settings in different clusters.



Set the document name to identify the data according to the desired cluster.

■Generate table for line	kage (For Bl, etc)		
○ No	<ul><li>Yes</li></ul>	All items	V
- Table with "Output to	t to linkage table" chec linkage table" checke	ked on the input paramet d in table settings of EXCE se refer to the manual for	L COM Add-in

Set "Yes" when using the table function.

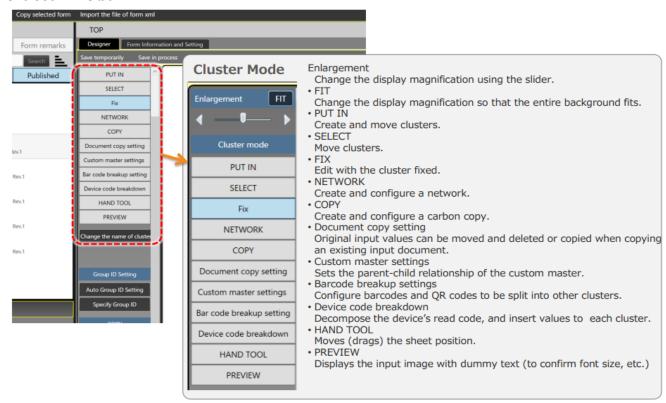


Set "Yes" when using the document copy function and select the 'Method of document copy' menu option.

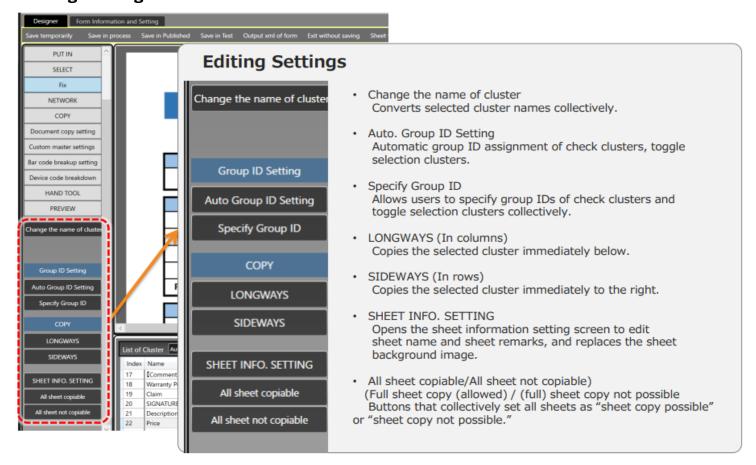
ve temporarily Save in process Save in Published Save in Test

Save form documents.

#### **Cluster Mode**



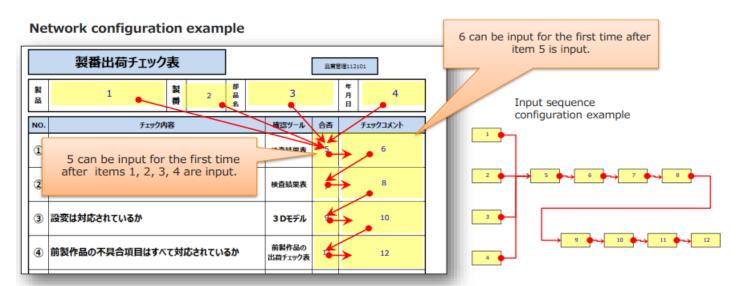
# **Editing Settings**



## **Network settings**

Two clusters can be set as "Prior" and "Successive," and are connected by network.

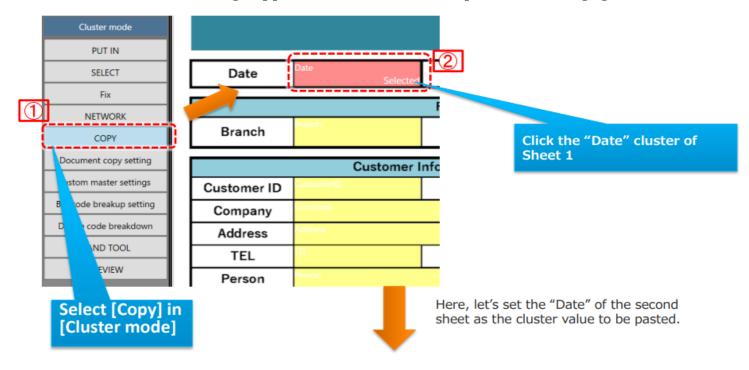
- Control the input order and input without errors or omissions
- Automatically require "Successive" input fields depending on the "Prior" selection
- Perform control such as limiting the seleselection value of the "Prior" .

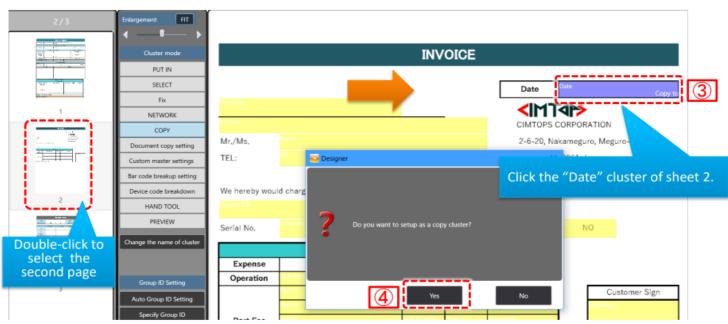


# **Carbon Copy Settings**

Use ConMas Designer "Carbon copy setting" in Cluster mode.

- Switch Cluster mode to "Copy" ①
- Click in the order ②cluster (Value to be copied) > ③cluster (Value to be pasted) on the next page
- A confirmation message appears, click "Yes" to complete the setting 4.



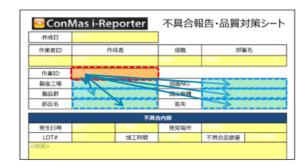


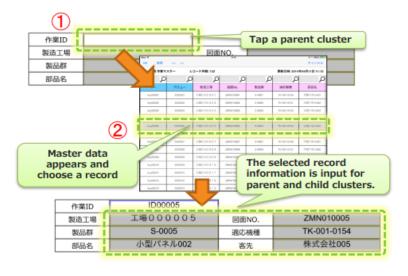
# **Custom Master**

Entering information using master data (registered on the server).

- 1 Tap a "Select Master" cluster (Parent cluster) for master data to appear.
- 2 Select a record from the master data and then values in the record are entered to clusters (child clusters) accordingly.

# Entering information using master data





By creating master data and linking it with clusters in the template form, data can be input via tablet.



# "Excel book for custom master" and ConMas Manager

- Creating master data in CSV files using an Excel book (Custom Master Input Sheet)
- · Upload the master data in CSV using ConMas Manager



# **ConMas Designer**

- · Custom master settings for clusters in a template form
- · Linking the parent-child relationships of master data



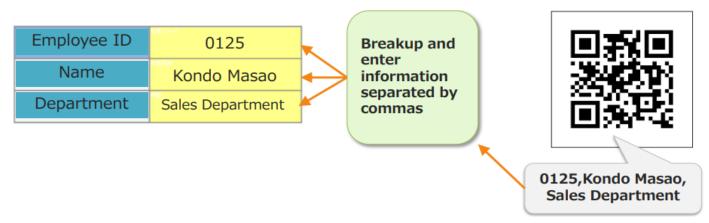
# i-Reporter app

- · Input values using master data
- · Master data downloads

# **Barcode Breakup Function**

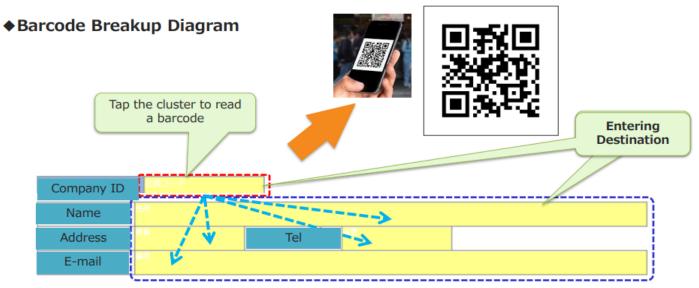
This functithe information into multiple clusters at one time.

♦ Scan a barcode and breakup to enter the information according to the settings.



Set up a cluster to read barcode and to enter the values after breaking up the read data. Barcode reading (Cluster Type: Bar code): A cluster that reads a barcode Entering destination (Cluster Type: Bar code): Barcode data that splits into multiple clusters

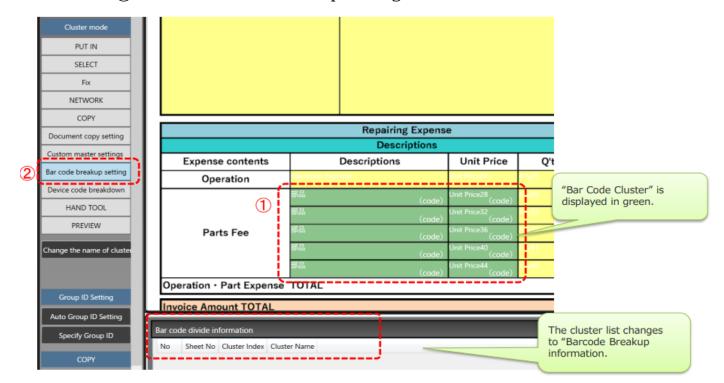
\* Up to 100 "Entering destinations" can be set from one "Barcode reading."



\* Cluster of "Company ID" is composed of "Barcode reading" and "Entering destination".

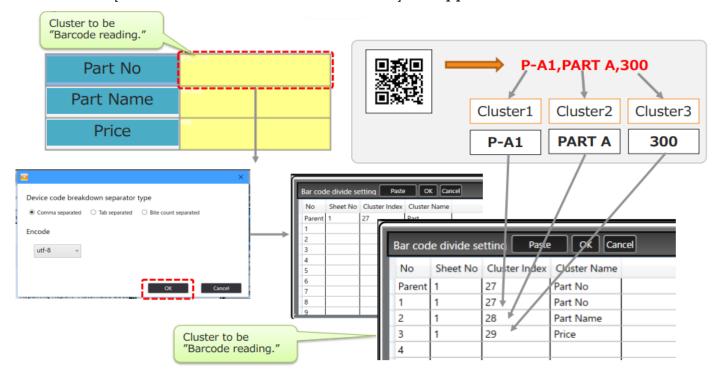
Barcode breakup is set in ConMas Designer

- 1) Cluster types should be set as "Bar code(s)."
- (2). Select "Bar Code Breakup Setting." from Cluster mode.

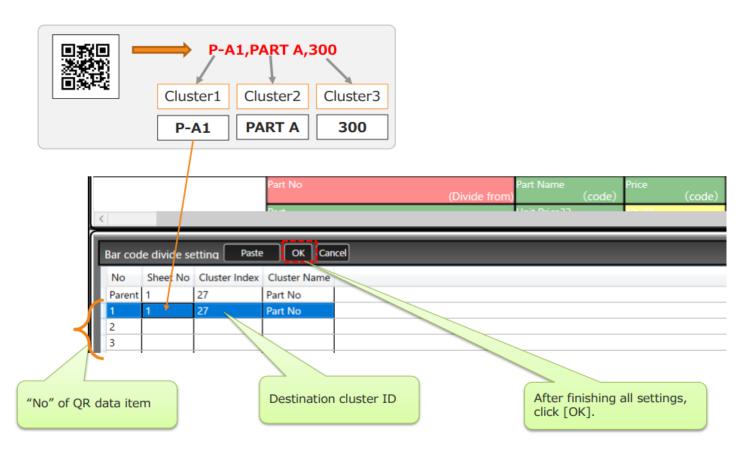


# Barcode reading cluster setting

- Click the cluster to be "Barcode reading" and choose the separator type, then click [OK].
- [Device code breakdown information] list appears.



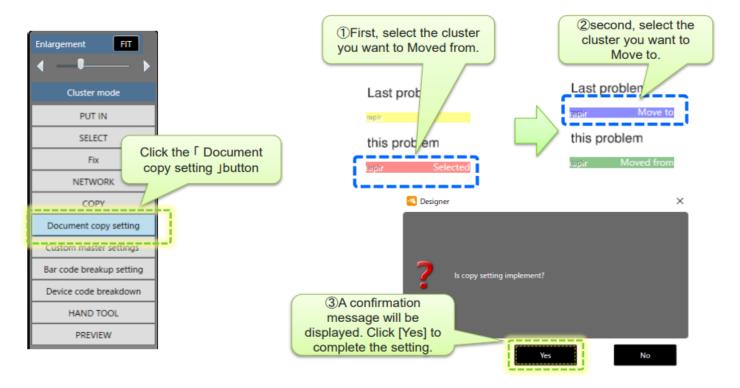
\* In this case, cluster ID 27 is composed of "Barcode reading" and "Entering destination".



# **Document copy settings**

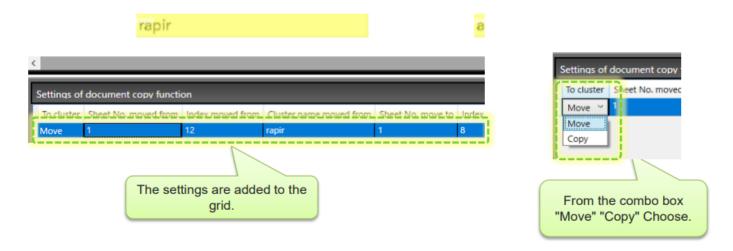
Click the "Document copy setting "button from "Cluster mode" on the edit screen to enter the mode to set the input value movement.

First, You can set the Moved from cluster and Move to cluster by selecting the Moved from cluster and then selecting the Move to cluster.



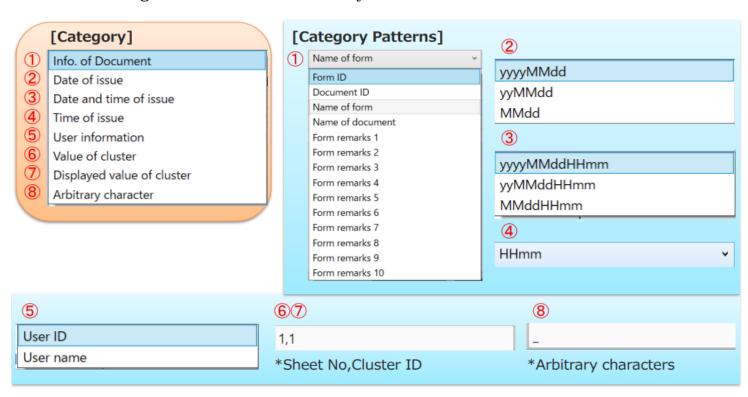
When you set the Moved from and Move to clusters, the settings are added to the "Settings of document copy function" grid.

By double-clicking the "To cluster" item on this grid, you can select the document copy function" grid. By double-clicking the "To cluster" item on this grid, you can select the "Move" and "Copy" settings from the combo box. The default setting is "Move".

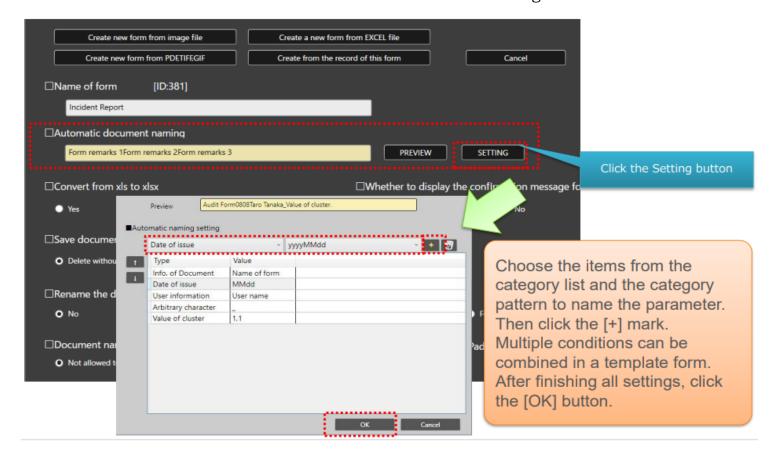


# **Automatic File (Document) Naming Function**

Parameter (Category)-dependent file naming when saving a document. The following contents can automatically be added to the file name.



Click the "SETTING" button in the "Form Information Setting" Tab.



# Main menu of the Designer editing screen

Save temporarily Save in process Save in Published Save in Test Output xml of form Exit without saving Hide sheet view Maximize screen size Output Excel of form.

• Save temporarily

Temporarily saves the file locally. When an error occurs, you can resume from the temporarily saved state.

• Save in process

Store it privately on the server.

• Save in Published

It will be saved to the server as public and can be viewed on the iPad app.

• Save in Test

Save it to the server for testing. You can see it if the iPad app is set to display the test document.

- \* Please use the document created from the test public definition only for the purpose of testing before operation.
- Output xml of form

Save the Forms locally as an xml file.

• Exit without saving

Discard the edited contents and close the editing window.

• Hide sheet view

Hides the thumbnail list of the sheet.

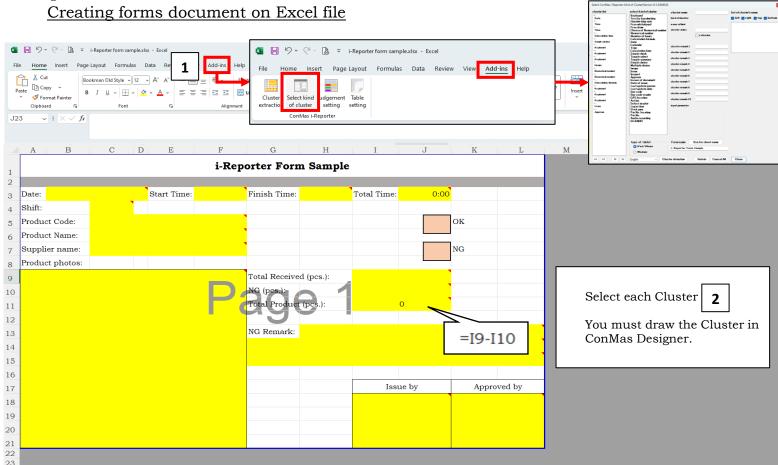
• Maximize screen size

Hides the window frame and Forms list, and maximizes the editing screen.

• Output Excel of form.

Valid only when the Forms is created from the EXCEL file. Return the Forms information to the EXCEL file and output it again.

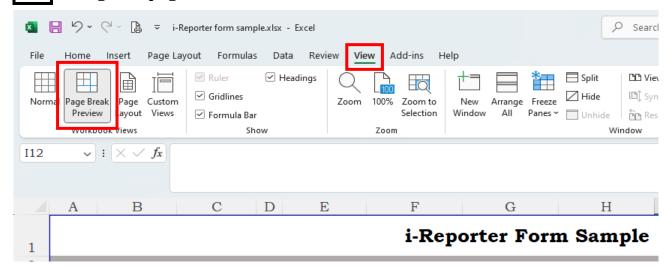




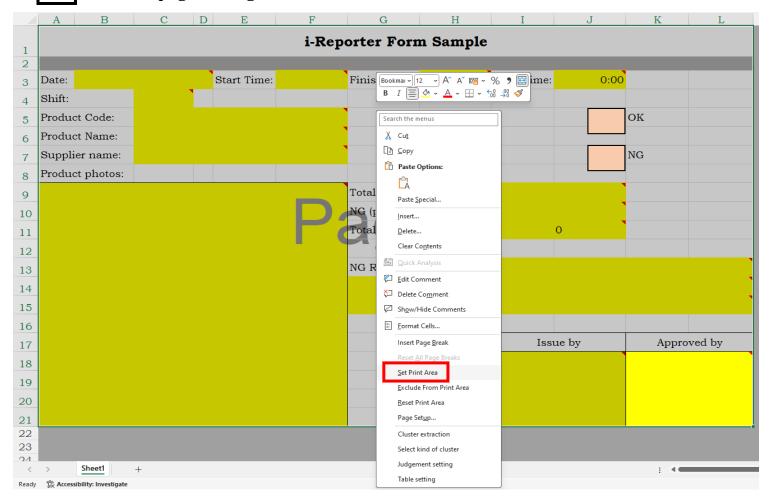
# 2 Select kind of cluster

Title	Cluster type
Date:	Date
Start Time:	Time
Finish Time:	Time
Total Time:	Calculation time
Shift:	Single choice
Product Code:	Keyboard
Product Name:	Keyboard
Supplier name:	Keyboard
Product photos:	Image
Total Received (pcs.):	Numerical number
NG (pcs.):	Numerical number
Total Product (pcs.):	Calculation formula
NG Remark:	Keyboard
Issue by	Issue
Approved by	Approve

# 3 Change the page view

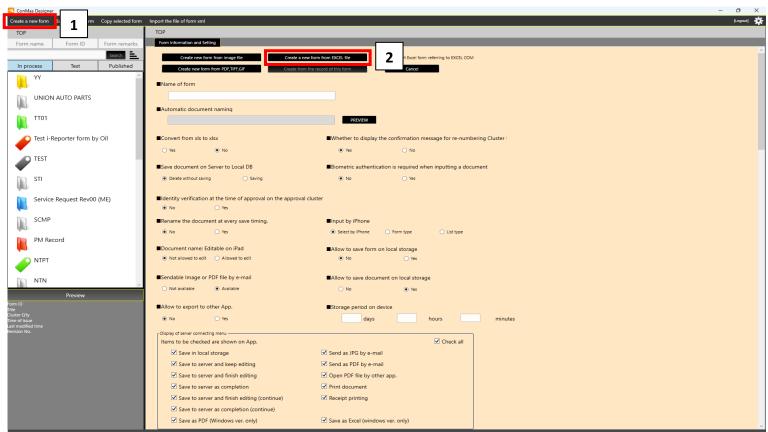


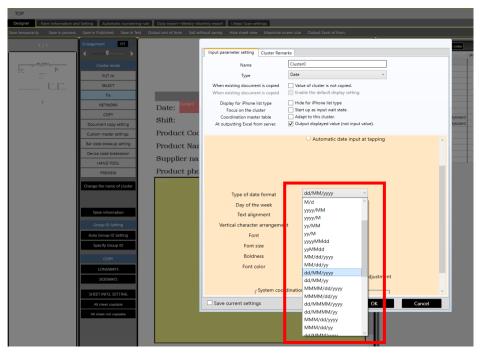
4 Cover the page and right click to select 'Set Print Area'



5 Save and close excel file

Creating forms document on ConMas Designer app.





☐ Value of cluster is not copied.

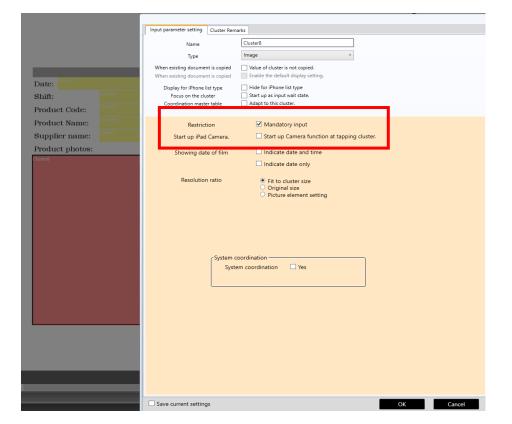
✓ Enable the default display setti Hide for iPhone list type

Start up as input wait state.

Adapt to this cluster.

✓ Output displayed value (not input value). Product Name: Supplier name: Product photos ration with stick pins functio Set pin colors for alternatives

Item of choices Take item of choices as a number. ltem 1 Value Label Default
A A 
B B 
B ☐ Input with Keyboard. Save current settings OK Cancel



**3** Select the date display format as desired.

- Select data input style
- Enter choice data.

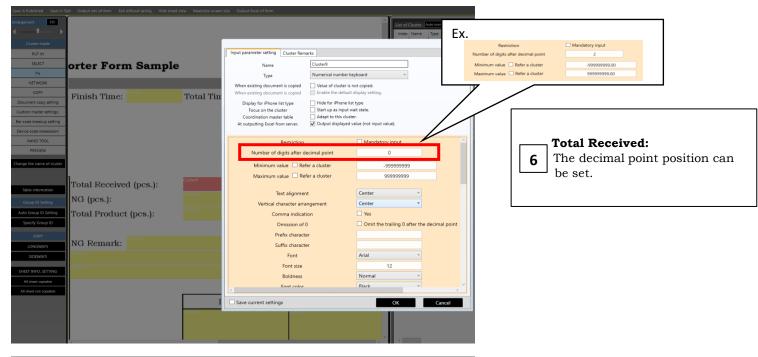
#### **Product photos:**

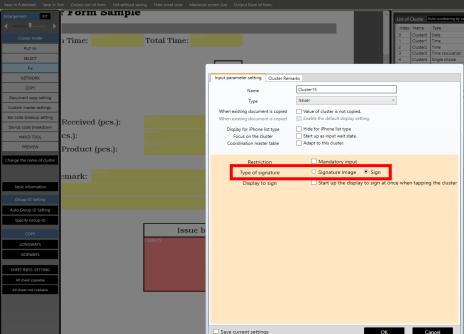
5

Set up camera and library usage.

- Restriction = Pop-up choice between Open camera or library.
- Start up iPad Camera = Opening the camera to take a photo.

Shift:





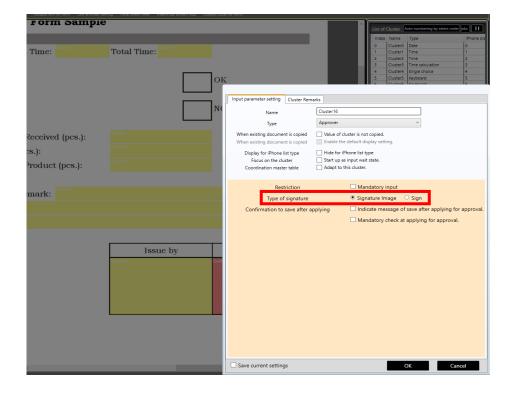
#### Issue:

Select the type of signature placement.

7

- Signature Image (In order to use this field, the user must attach a picture of their signature on the ConMas Manager).

- Sign.

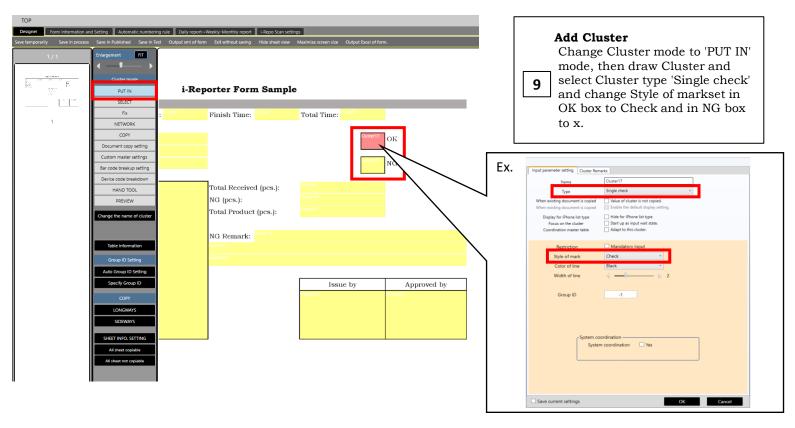


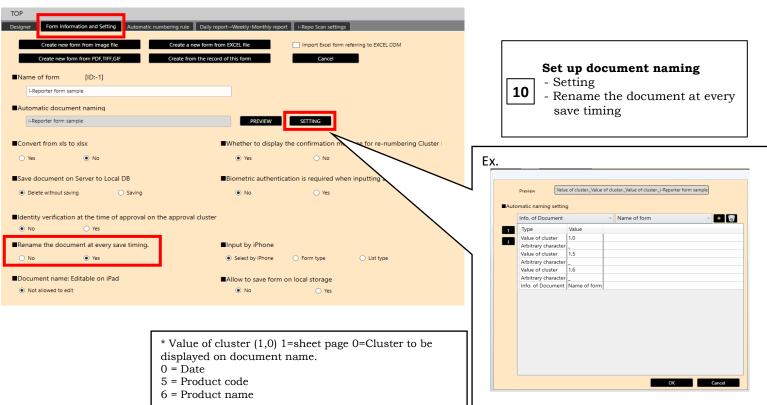
#### Approver:

Select the type of signature placement.

- Signature Image (In order to use this field, the user must attach a picture of their signature on the ConMas Manager).

- Sign.





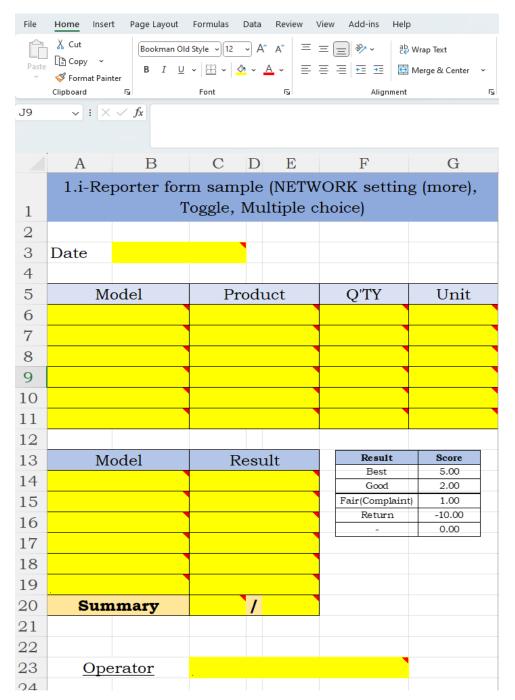


# Save

- Save temporarily
- Temporarily saves the file locally. When an error occurs, you can resume from the temporarily saved state.
- Save in process
- Store it privately on the server.
- 11 Save in Published
  - It will be saved to the server as public and can be viewed on the iPad app.
  - Save in Test
  - Save it to the server for testing. You can see it if the iPad app is set to display the test document.
  - \* Please use the document created from the test public definition only for the purpose of testing before operation.

# Example 2 NETWORK, Toggle, Multiple choice mode

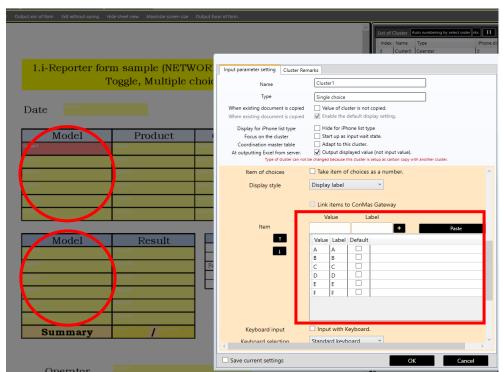
Creating forms document on Excel file



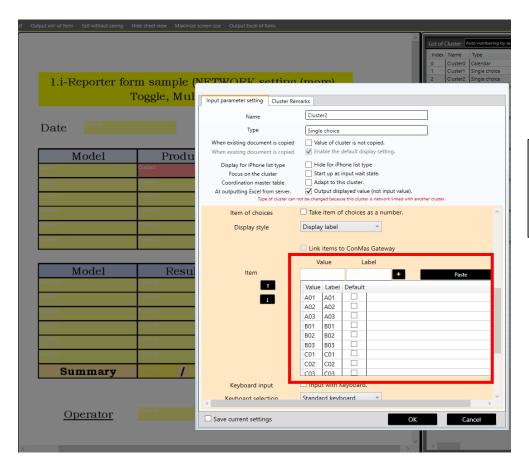
Select kind of cluster

Title	Cluster type
Date	Date
Model	Single choice
Product	Single choice
Q'TY	Numerical number
Unit	Single choice
Model	Single choice
Result	Toggle select
Summary	Toggle summary
Operator	Multiple choice

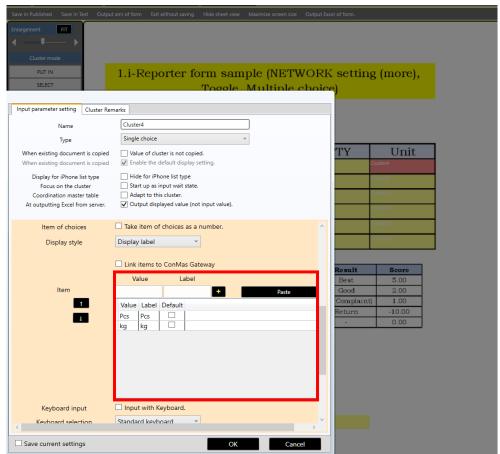
# Creating forms document on ConMas Designer app.



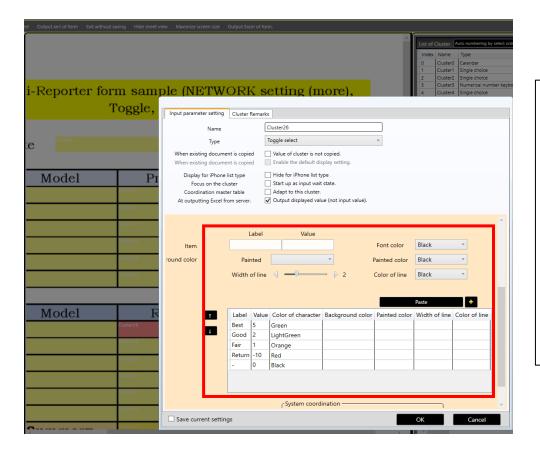
1	<b>Model:</b> Enter choice data.

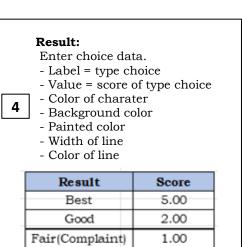


Product:
Enter choice data.



**3** Unit: Enter choice data.

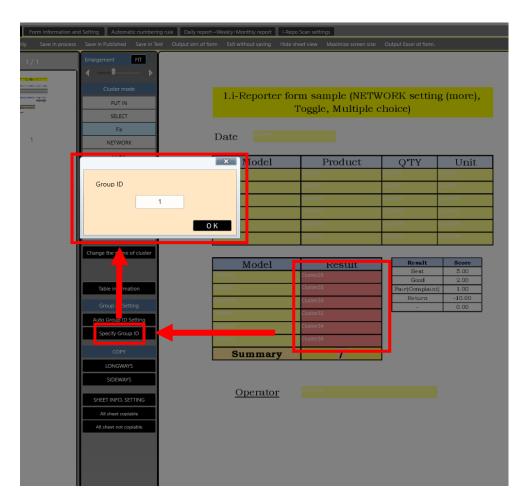




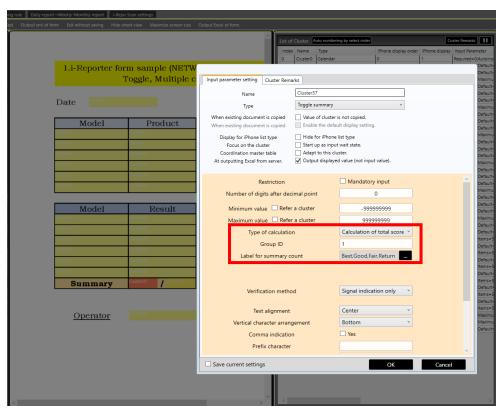
Return

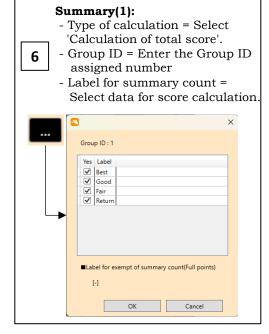
-10.00

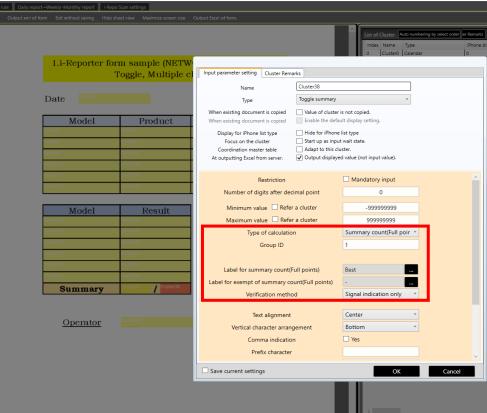
0.00

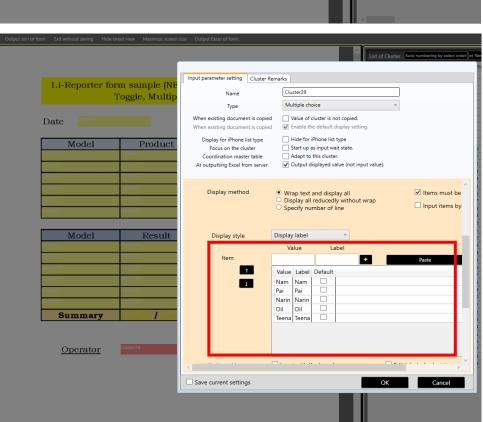


Select the Result set data, then press the 'Specify Group ID' command and enter the Group number as '1'.









## Summary(2):

- Type of calculation = Select 'Summary count(Full points)'.
- Group ID = Enter the Group ID assigned number
- Label for summay count(Full points) = Select the data with full score.

Ex. Best = 5.00

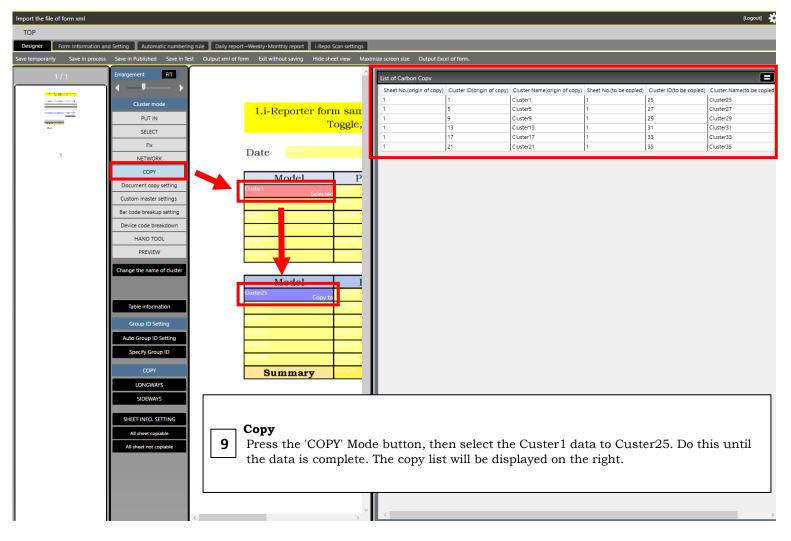
 Label for exemt of summary countIFull points) = Select data without scores.

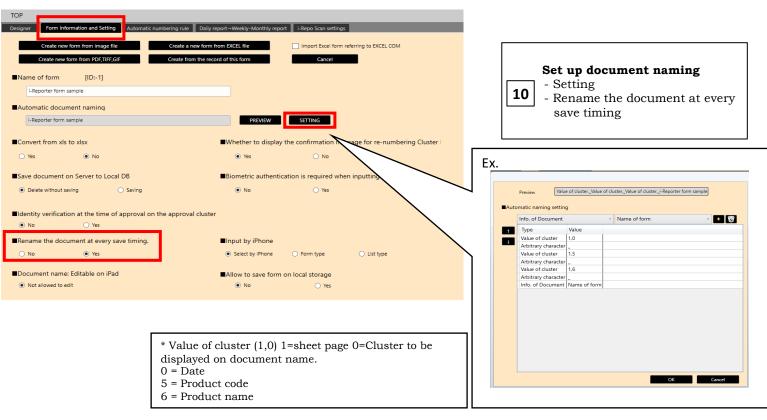
Ex. - = 0

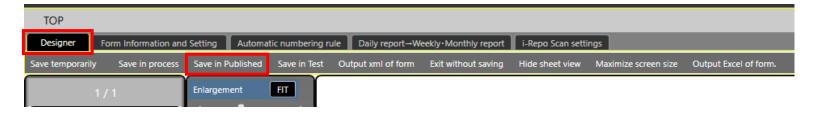
7

Verification method = Select'Signal indication only.

8 Operator: Enter choice data.







#### Save

- Save temporarily
- Temporarily saves the file locally. When an error occurs, you can resume from the temporarily saved state.
- Save in process

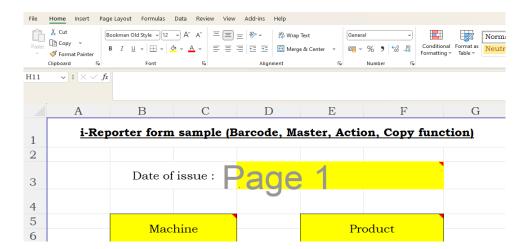
- Store it privately on the server.

   Save in Published

  It will be saved to the server as public and can be viewed on the iPad app.
- Save in Test
- Save it to the server for testing. You can see it if the iPad app is set to display the test document.
- \* Please use the document created from the test public definition only for the purpose of testing before

# **Example 3 Barcode, Master, Action function**

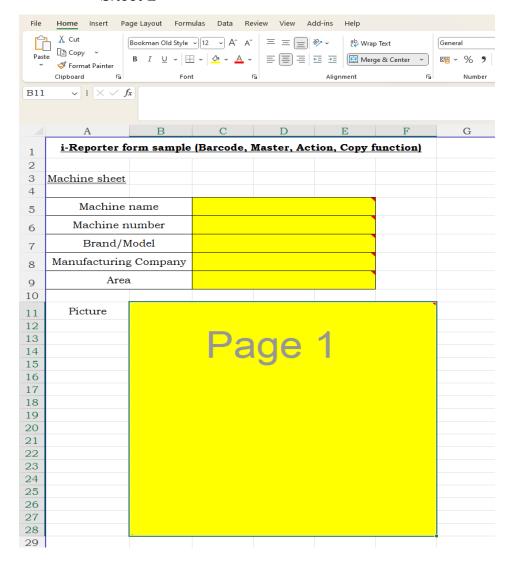
Creating forms document on Excel file
"Sheet 1"



#### Select kind of cluster

Title	Cluster type
Date of issue	Date of issue
Machine	Action
Product	Action

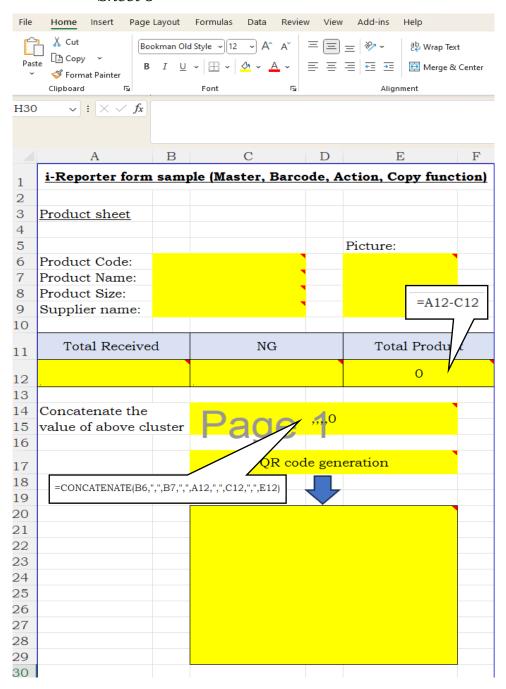
"Sheet 2"



#### Select kind of cluster

Title	Cluster type	
Machine	D 1-	
name	Bar code	
Machine number	Bar code	
Brand/Mod el	Bar code	
Manufacturi ng Company	Bar code	
Area	Bar code	
Picture	Image	

"Sheet 3"



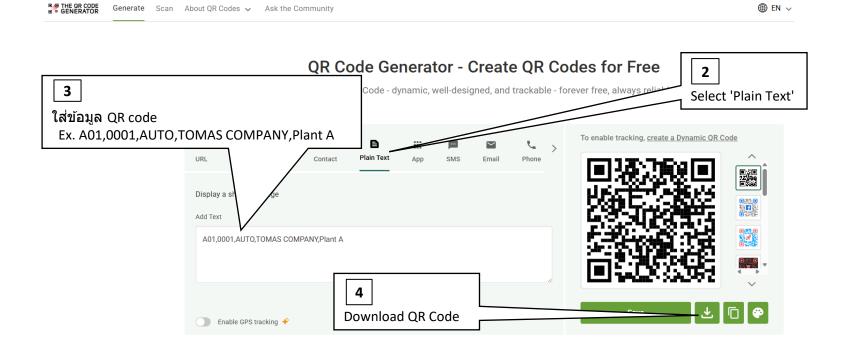
#### Select kind of cluster

Title	Cluster type			
Product Code:	Select master			
Product Name:	Keyboard			
Product Size:	Keyboard			
Supplier name:	Keyboard			
Picture:	Image			
Total Received	Numerical number			
NG	Numerical number			
Total Product	Calculation formula			
Concatenate the value of above cluster	Calculation formula			
QR code generation	Action			
	Image			

⊕ EN ∨

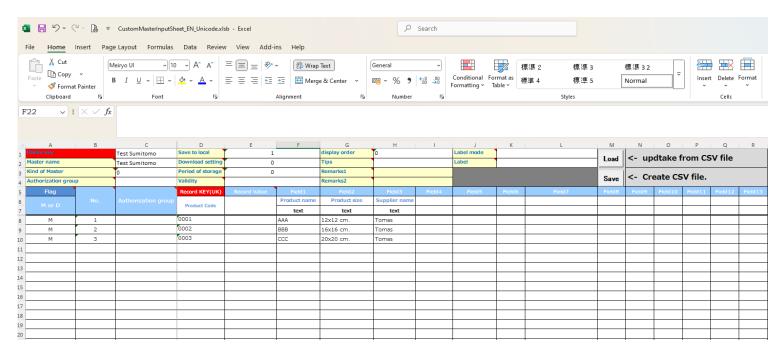
# Creating Bar code

Go to the website to create a QR code. <a href="https://www.the-grcode-generator.com/">https://www.the-grcode-generator.com/</a>



# Creating Master Manager

1 Open excel file 'CustomMasterInputSheet\_EN\_Unicode.xlsb'



2 Enter the values in each cell of the basic master information as follows.

Master key	Test Sumitomo
Master name	Test Sumitomo
Kind of Master	0
Authorization group	

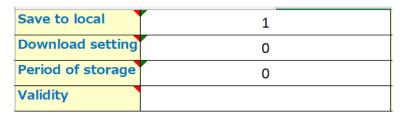
**Master key:** Enter as a character string (required) **Master name:** Enter the name as a character string

If not specified, the master key will be used as the name.

**Master type:** Please select 0.

**Authorization group:** Enter the referable group

number, separatedby;.

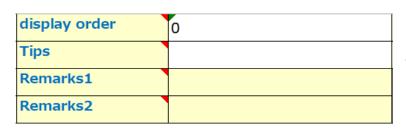


**Save to local:** 0: not allowed 1: allowed (Set by one of these)

**Download setting:** 0: Automatic download 1: manual download (Set by one of these) **Period of storage:** Set the value in minutes.

(If not entered, no setting)

**Validity:** Specify in yyyy/MM/dd format (If not entered, no period is specified.)



**Display order:** Specify with a numerical value from 0 (can be not entered)

**Tips & Remarks:** Enter master remarks as a character string (can be not entered)

Label mode
Label [icon=2]Label1/Label1-1;[icon=3]Label2

**Label mode:** 0: Do nothing 1: Set to 1 if this master is already labeled and you want to release it. (Set by one of these)

**Label:** Specify labels separated by ; in the input example format. For example [icon=2]Label1/Label1-1;[icon=3]Label2

3 Set the actual record information that makes up the custom master table.

Flag		Authorization	
M or D	No.	group	
M	1		
M	2		
M	3		

**Flag:** M : Performs merge operation D : Delete operation is performed

Blank: No record is created

When creating a new record -> M When editing and updating -> M When no change is made at the time of update -> Blank

**No:** The sequence in which records are displayed is 0 to Specified by numerical value (can not be entered)

**Authorization group:** Specify referable groups separated by ;. (Can be not entered)

4 Set the key information that makes up the custom master table and the information for its fields.

Record KEY(UK)	Record Value	Field1	Field2	Field3	
Dundrich Code		Product name	Product size	Supplier name	
Product Code		text	text	text	
0001		AAA	12x12 cm.	Tomas	
0002		BBB	16x16 cm.	Tomas	
0003		CCC	20x20 cm.	Tomas	

**Record key:** Enter the name as a character string (Can be not entered)

**Record value:** Enter as string (Can be not entered) **Field name:** Enter as string (Can be not entered)

Field type: Define the field type to be associated with each input cluster, and set the input format

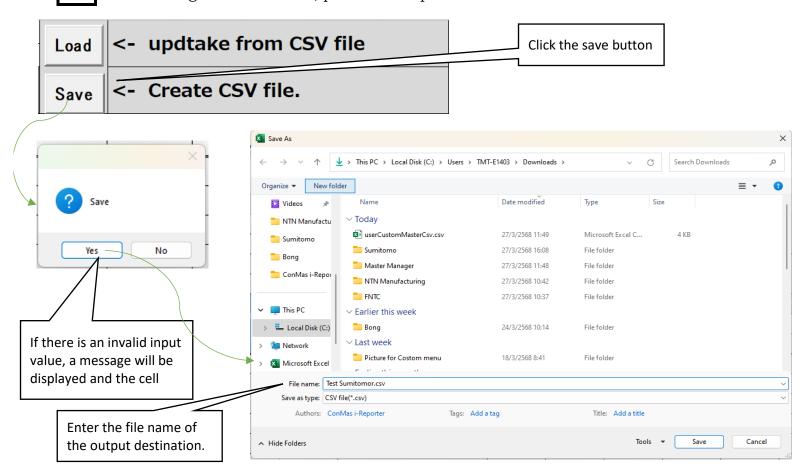
according to the type as follows.

text: character string date: yyyy/MM/dd format

time: hh:mm numeric: numeric bool: TRUE / FALSE

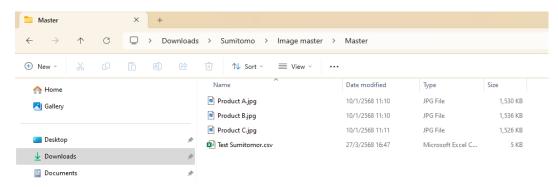
Setting record information: Setting image information	Image01	Image02	Image03
Image field name: Enter as a character string.	Image		
(Can be not entered)			
Field name: Enter the name of the image file	Product A.jpg		
(Can be not entered)	Product B.jpg		
	Product C.ipg		

5 After entering a value in a cell, perform the operation save.

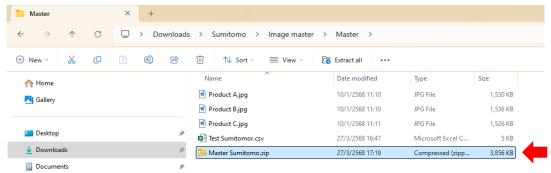


# 6 Upload CSV

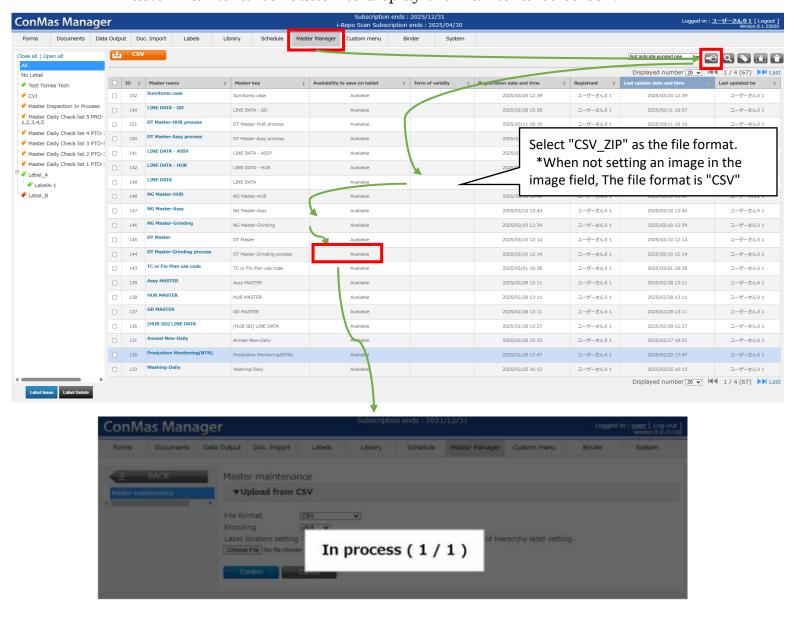
6.1 Place the imported CSV and the target image file in the same folder.



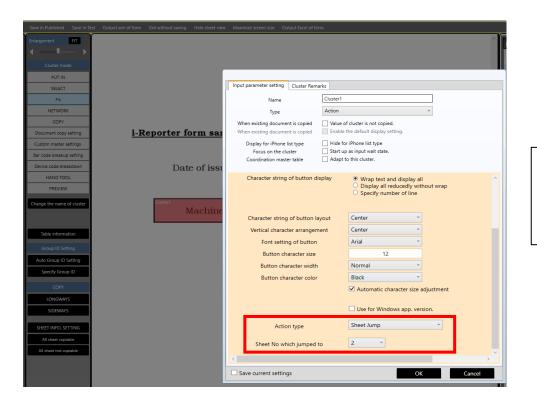
6.2 Select multiple imported CSV and image files and perform Zip compression.



6.3 Upload the created CSV\_ZIP to Manager. Click the Manager menu "Master Manager" -> "Master maintenance" button to display the maintenance screen.

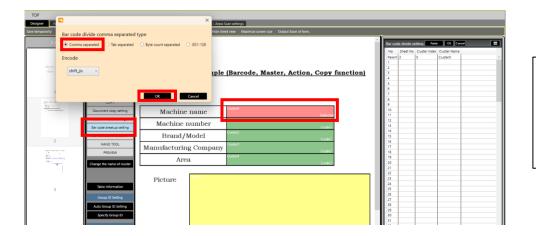


Creating forms document on ConMas Designer app.



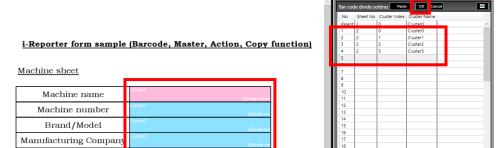
# Machine & Product:

- Action type = Select 'Sheet Jump'
   Sheet No which jumped to = The page you want to open
  Ex. Machine jumped to "2",
  - Product jumped to "3"



#### Setting Bar code:

- Select MODE 'Bar code breakup setting'
- Double click on the 'Machine name' box
  - Select Type bar code 'Comma separated' and press 'OK'

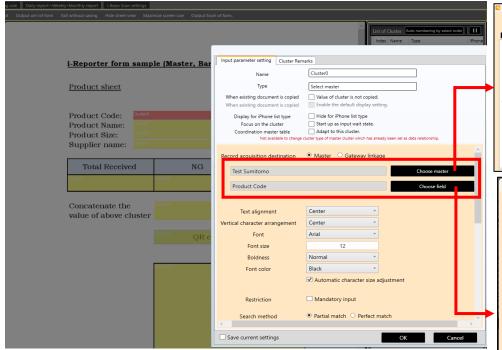


Area

#### Setting Bar code:

Click on the Bar code divide setting box in order, starting from the 1st order, then click on the box data that you want to display bar code data in the 1st order, do this until all the boxes that you have prepared are complete.

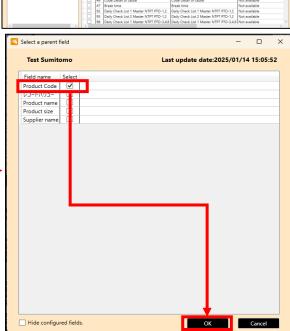
prepared are complete.
The pink box will be the QR Code scan box and you want the data to appear in that box first, so the 1st order is the setting at Machine name box in the blue box section, which will be the box where the QR Code will automatically display data in order.

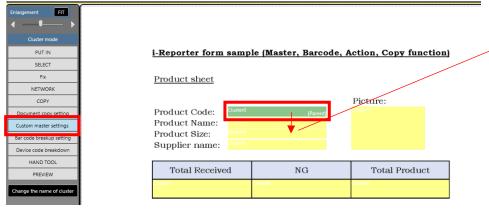


## **Setting Master:**

4

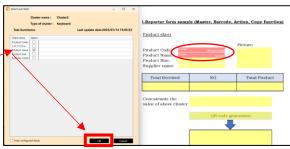
Click on the 'Product Code' field to select the Master and select the data usage in the 'Product Code' field.





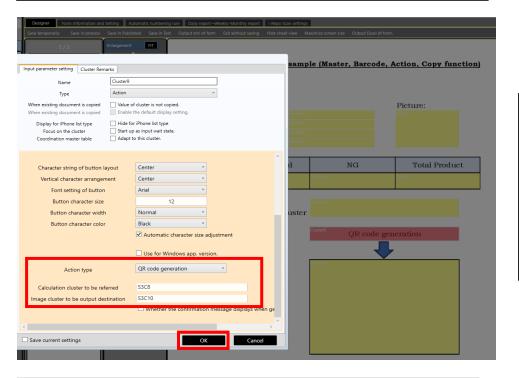
#### Setting Master:

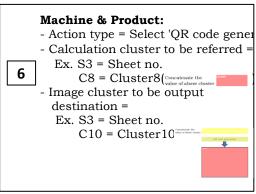
Change the mode to 'Custom master setting'. The fields where we have set the Master will be green. Click on the green fields to turn them into pink. Then click on the fields where you want the Master data to be automatically displayed and select the data set to match that field. An example of where you want the data to be displayed according to the selected Master is the Product Name, Product Size, Supplier name, and Picture fields.

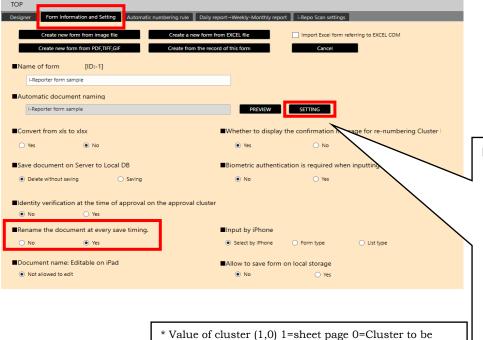




Select and fill in all fields of the data set you want. The Master data set list will be displayed on the left sidebar. To delete, right click and select 'Release parental relation in







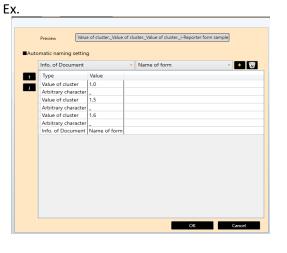
displayed on document name.

0 = Date 5 = Product code 6 = Product name

#### Set up document naming

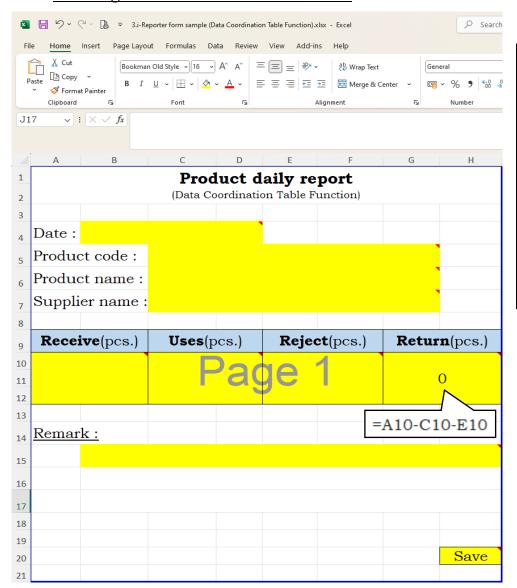
7 - Setting

- Rename the document at every save timing



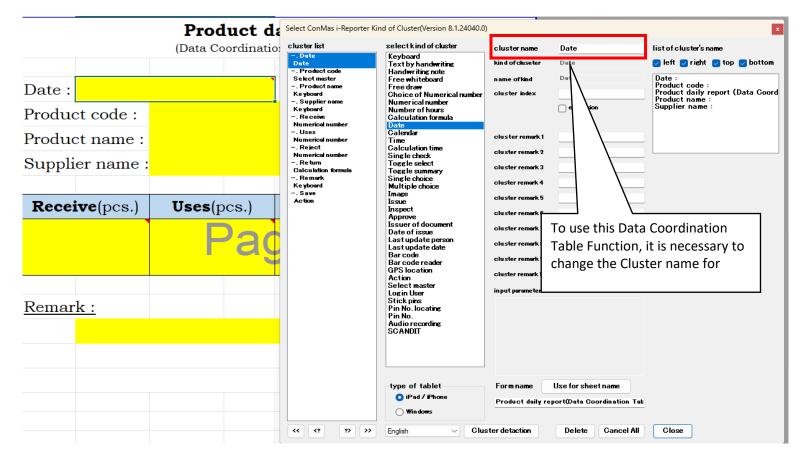
## **Example 4 Data Coordination Table Function**

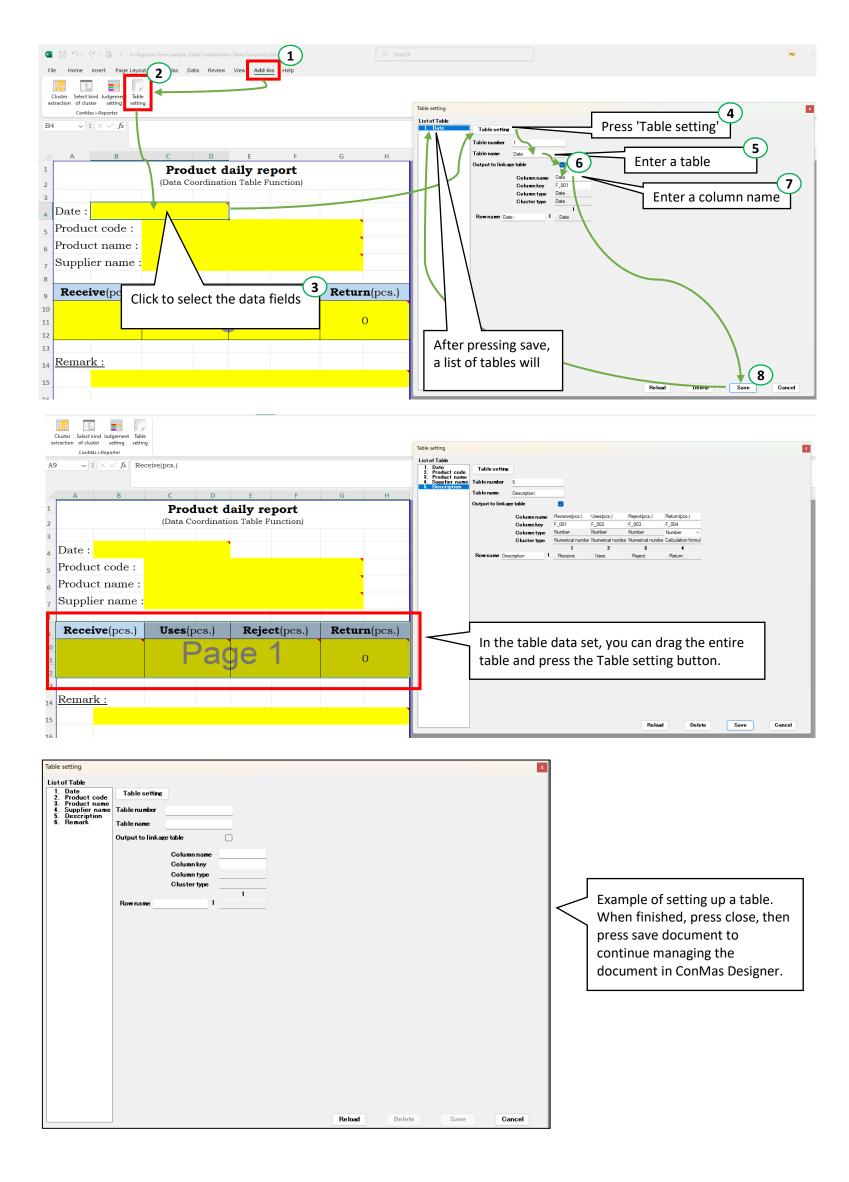
Creating forms document on Excel file



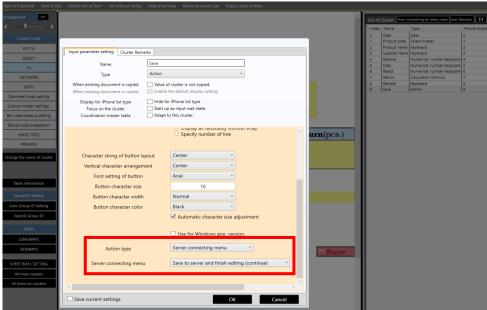
Select kind of cluster

Title	Cluster type	
Date	Date	
Product code	Select master	
Product name	Keyboard	
Supplier name	Keyboard	
Receive	Numerical number	
Uses	Numerical number	
Reject	Numerical number	
Return	Calculation formula	
Remark	Keyboard	
Save	Action	





## Creating forms document on ConMas Designer app.



## Designer Form Information and Setting Automatic numbering rule Daily report—Weekly-Monthly report i-Repo Scan settings Displayed value of clu v System key 3 System key 4 System key 5 ■Recording cluster data format ■Auto. File output at document saving as editing ■Auto. File output at document completed No Yes (according to system settings) Yes (Set individually) ■Generate table for linkage(For Bl, etc) Yes All items Output target of "Specify items": - Clusters with "Output to linkage table" checked on the input parameter setting screen - Table with "Output to linkage table" checked in table settings of EXCEL COM Add-in There are precautions for using "All items". Please refer to the manual for details. ■Use document copy function ■Prohibit to re-edit the cluster value that has been saved once ■Mutual exclusion for a created document Auto. data acquisition for the items of SINGLE/MULTIPLE-CHOICE No No Yes Cooperated sorting form ID ■Coordination with sorting form ■Set this form as sorting form Cooperated sorting form ID Single choice cluster for cooperated sorting Cooperated sorting form ID

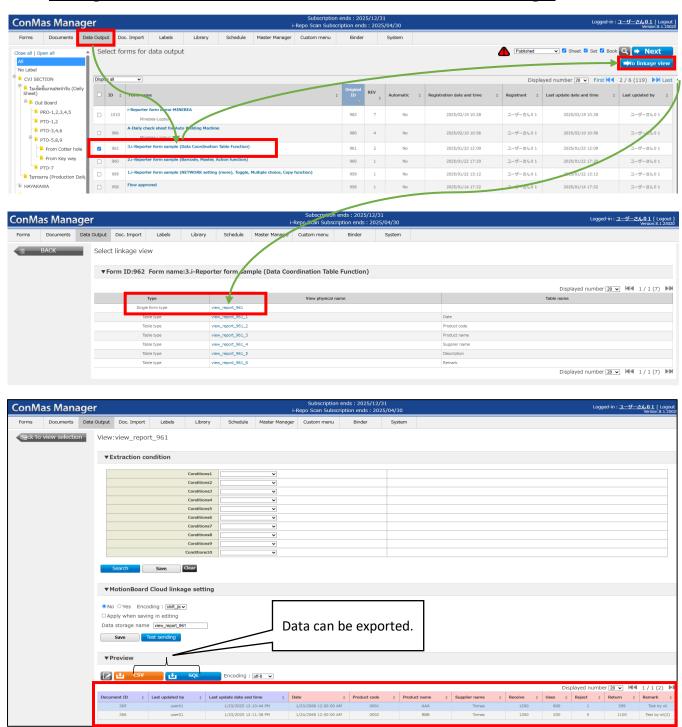
#### Save:

- Action type = Select 'Sever connecting menu'
- 'Sever connecting menu = Save to server and finish editing (continue)

## $\ \ \, \textbf{Form Information and Setting:}$

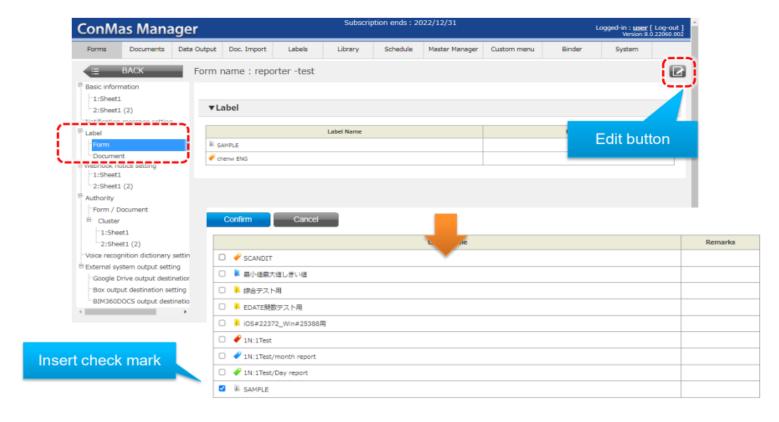
- Generate table for linkage (For BL, etc) = 'Yes' and select 'All items'

## Example Data Coordination Table Function on ConMas Manager



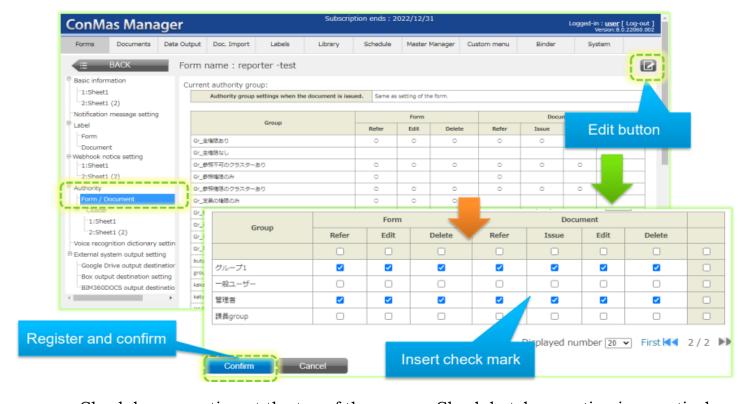
# 5. Selecting address for forms and documents - Document permission setting, Document visibility permission (Forms menu)

- 1. Forms Label
  - Labels are separately configured for Forms and Documents. Create a label in advance in "Labels."
  - Documents labels can also be configured later in "Documents."



#### 2. Forms – Authority

- For the Forms authority, the authority set up in "Groups" at the time of definition creation is set up as the initial value.
- In the editing screen, the list of groups and check boxes for each authority are displayed Register the necessary authority by inserting a check mark.



• Check box operation at the top of the screen: Check batch operation in a vertical row.



• Check box operation at the right of the screen: Check batch operation in a horizontal rov



• Check box operation in the upper right corner of the screen: All checks are batch operations.



• Set "what group" to which "right" is given for the corresponding template form

#### 

#### **Form**

- Refer
   Manager, Designer authority to reference the corresponding forms
- Edit
   Manager, Designer authority to edit the corresponding forms
- Delete
   Manager the right to delete the corresponding forms

## **Document**

- > Refer: In i-Reporter, Manager, authority to reference the input document created from this template form.
- Issue: In i-Reporter, Manager authority to create a new input document from this template form.
- Edit: In i-Reporter, Manager authority to edit the input document created from this template form.
- Delete: In Manager, the authority to delete the input document created from this template form.

## 6. Setting approved (System menu)

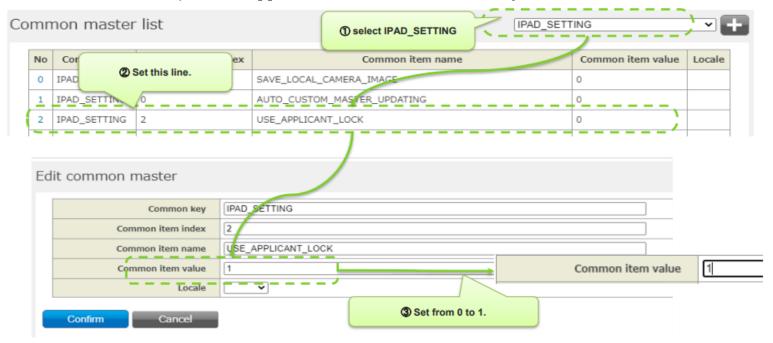
Enable this function for all forms (common setting)

You can set the applicant edit lock function for the entire system by selecting  $\rightarrow$  Common Master from the menu "System".

The applicant edit lock function is enabled for all forms.

\*If set for the entire system, the form definition settings will be ignored.

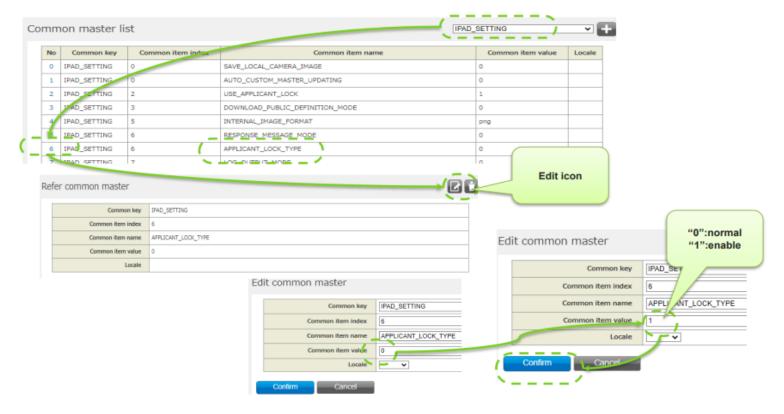
- 1. Select "IPAD\_SETTING" from the common key.
- 2. Change the common item name "USE\_APPLICANT\_LOCK" from "0" to "1".
- "0": Disabled) No system-wide settings (default)
- "1": Enabled) Enable applicant edit lock for the entire system



#### Enable applicant edit lock mitigation mode

The settings are enabled in the Common Master of System.

- ➤ Common key "IPAD\_SETTING"
- ➤ Common item name "APPLICANT\_LOCK\_TYPE"
- > Common item value "0": Normal "1": mitigation mode
- $\triangleright$  \* The default is "0"

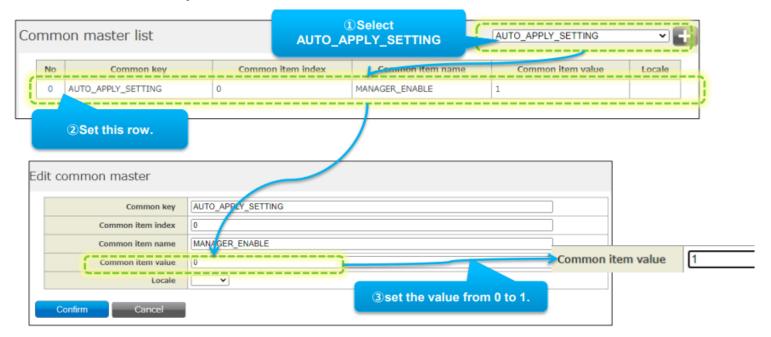


## Enable automatic network application

In the menu "System" -> "Common Master", enable the automatic network application function or the entire system.

\*There is no individual setting for each Forms.

- 1. Select "AUTO\_APPLY\_SETTING" from the common key.
- 2. Change the common item name "MANAGER\_ENABLE" from "0" to "1" to make it effective for the entire system.

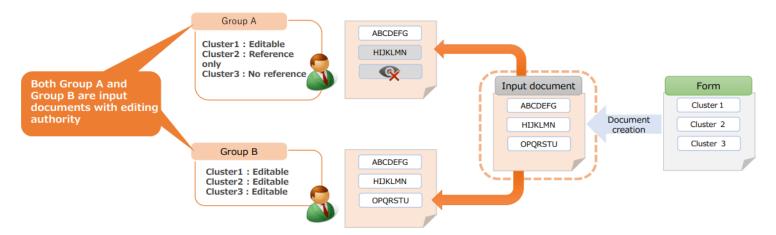


## 7. Locking signature fields for individuals by group (Forms menu)

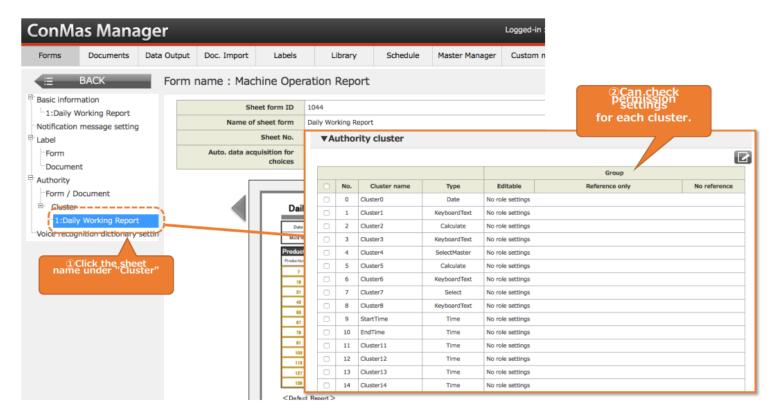
#### **Authority for Clusters**

The following authority can be set for each cluster

- ◆ Editable: Enter values in the cluster and check the entered values
- ◆ Reference only: Cannot enter values in the cluster, but you can check the entered values
- ◆ No reference : Cannot enter values in the cluster, nor can you confirm the value(s) entered.
- \* An "approved cluster" cluster type means the following.
- \* Editable → Can be approved \* Reference only → Applicable \*No reference → Cannot perform any operations



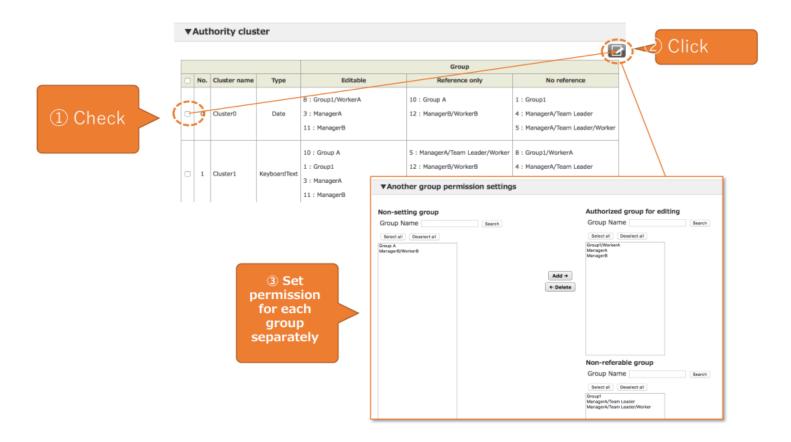
## **Authority for Clusters: Setting**



## **▼**Authority cluster



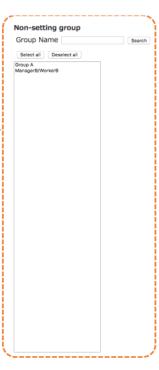
					Group	
	No.	Cluster name	Туре	Editable	Reference only	No reference
0	0	Cluster0	Date	8 : Group1/WorkerA 3 : ManagerA 11 : ManagerB	10 : Group A 12 : ManagerB/WorkerB	1 : Group1 4 : ManagerA/Team Leader 5 : ManagerA/Team Leader/Worker
0	1	Cluster1	KeyboardText	10 : Group A 1 : Group1 3 : ManagerA 11 : ManagerB 10 : Group A	5 : ManagerA/Team Leader/Worker 12 : ManagerB/WorkerB 8 : Group1/WorkerA	8 : Group1/WorkerA 4 : ManagerA/Team Leader 3 : ManagerA
	2	Cluster2	Calculate	1 : Group1	11 : ManagerB 12 : ManagerB/WorkerB	4 : ManagerA/Team Leader 5 : ManagerA/Team Leader/Worker
				"Editable" For target clusters, groups with editable permission settings are displayed.  *In the case of an approval cluster, "Approving group" is set.	"Reference only" For target clusters, cannot be edited, but groups that can be referenced are displayed.  *In the case of an approval cluster, set "group(s) that will apply"	"No reference" For target clusters, groups that cannot be referenced are displayed. *In the case of an approval cluster, add "Group that does not perform any operation of application approval" here

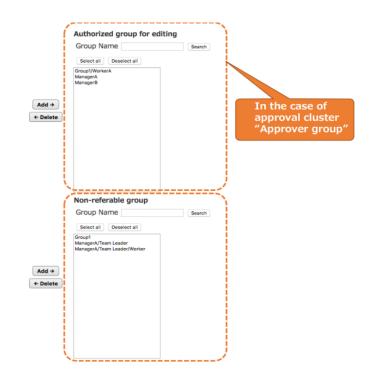


# Group(s) with "No" cluster permission setting

For groups that belong here with "reference only" settings, only when there is no setting in the editable group, and if there are settings for editable groups with the same authority as "editable."

In the case of approval cluster "Applicant group"

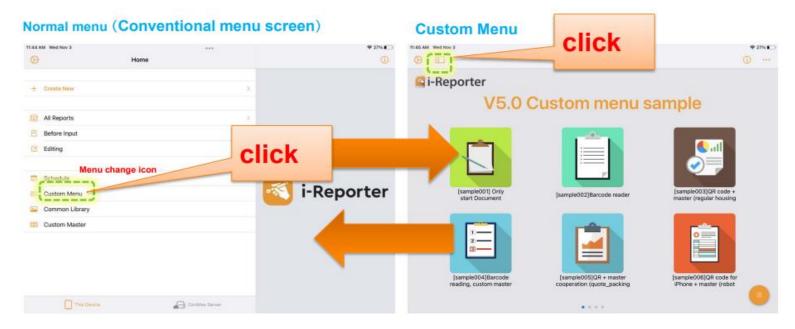




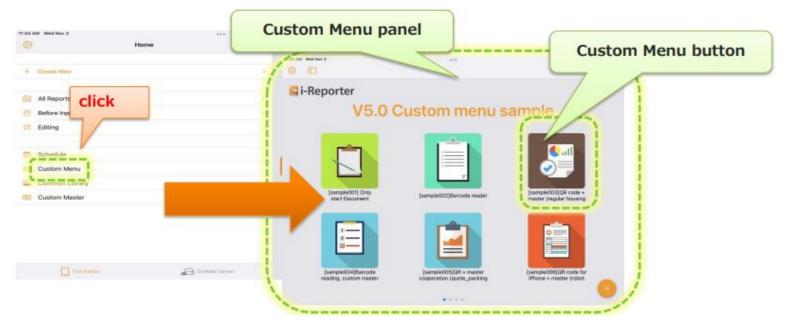
## 8. Custom menu

- ◆ This is a business menu that can be set by the user. You can place 6 businesses.
- ◆ Custom menu is set by the user in the Manager.

  It's automatically delivered to iPad and iPhone which has been set to Custom menu.
- ◆ You can click the menu change icon to switch to the conventional menu (Normal menu).

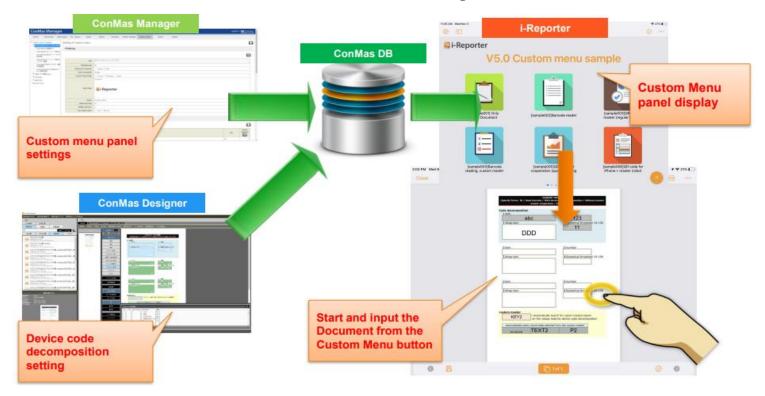


- ◆ The user can freely set the Custom Menu panel to be displayed on i-Reporter.
- ◆ The following actions can be assigned to the Custom Menu button located in the Custom Menu panel on i-Reporter.
  - 1. Call the Forms and create a new Document (display of Document input screen)
  - 2. Start Documents (display of Document input screen)
  - 3. When the Document is started, the value of the read device code is decomposed and automatically input to the decomposition destination cluster



## Custom menu settings

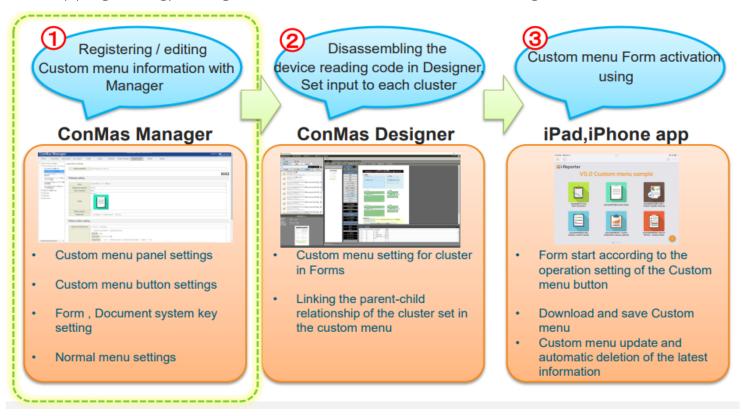
- Custom menu are created in ConMas Manager.
- The iPad and iPhone apps download and use the setting information.
- The settings for how to decompose the code read by the device into each cluster of Document are set in the Forms in ConMas Designer.



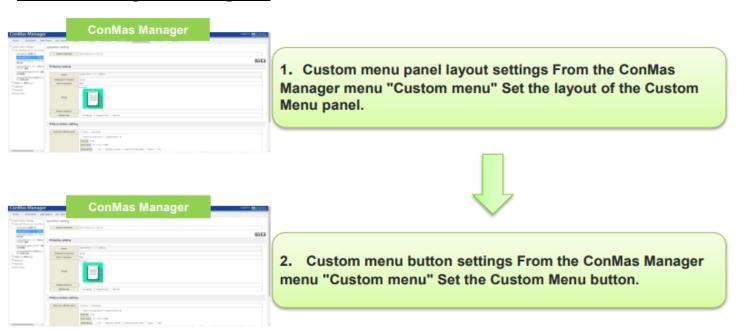
#### Custom menu settings Overall flow

The roles, (in the following flow. This section describes"

(1) Registering/editing Custom menu information with Manager".



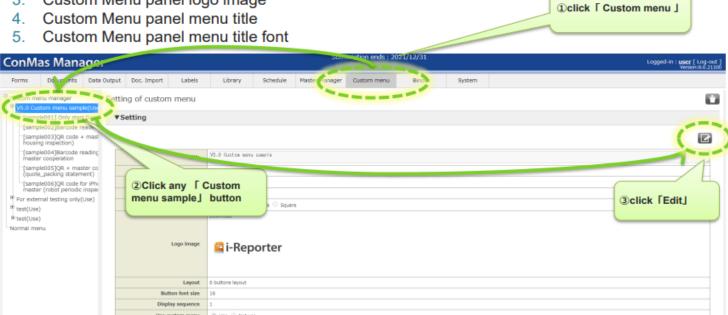
## Custom menu panel setting flow

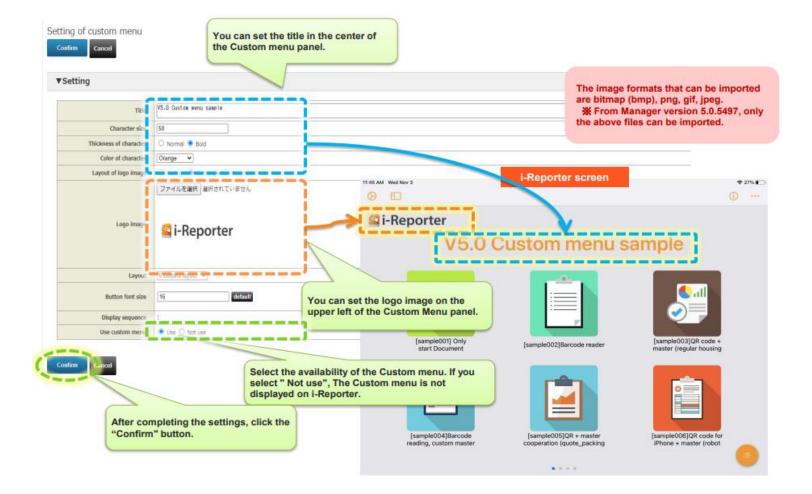


## The Custom Menu panel Layout settings

Layout settings for Custom Menu panel are made in ConMas Manager.

- The screen that displays the Custom menu button is called the custom menu panel.
- In the layout settings of the Custom Menu panel, you can set the following.
- 1. Availability of Custom menu
- 2. Custom Menu panel logo image layout
- 3. Custom Menu panel logo image





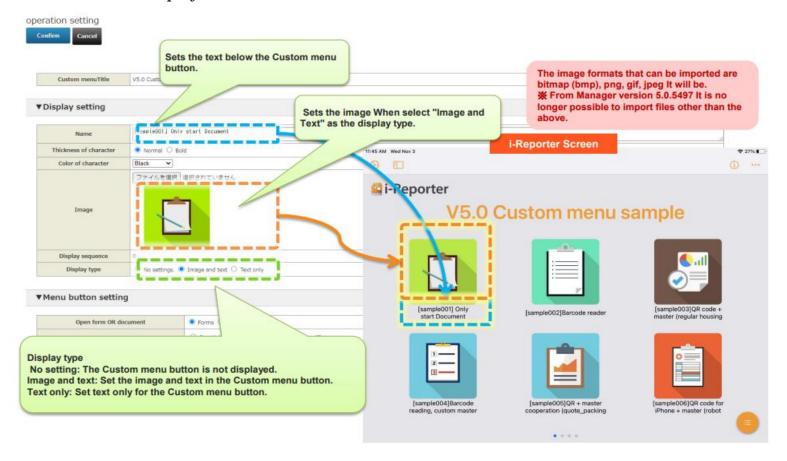
## Custom menu button settings

Custom menu button is set in ConMas Manager.

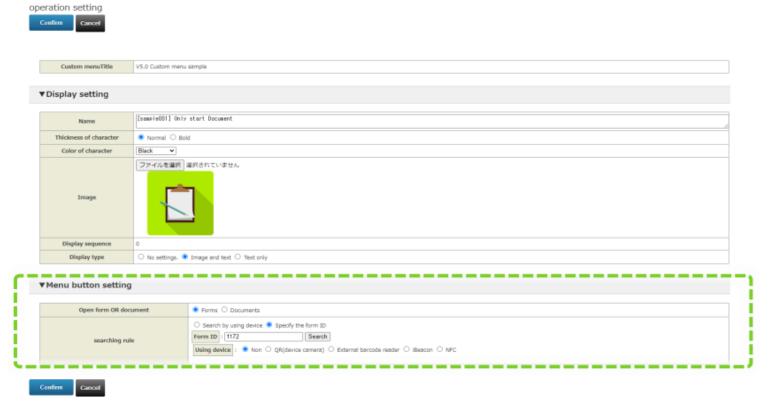
· Up to 6 Custom menu buttons can be set.



1. Custom menu button settings Set the display of Custom menu buttons.



2. Custom Menu button setting Set the operation to be assigned to the Custom menu button.



Set whether to call the Forms or the Documents from the Custom menu button.

- When "Forms" is selected, a new Document is created from the Forms and started.
- When "Documents" is selected, the Document is started.

#### 9. Library menu

#### Using Library management function

To use Library management function, please execute the following procedures in Manager.

- 1. Set the group that has authority for Library management.
- 2. Set the labels for Library management.
- 3. Register documents in common.
- 4. Register documents by form.
- 5. Set the documents to be referenced in the form.

## Setting document labels

Labels can be set for Common document or Documents by form.

- Click Labels, and then click Document Label / Common document or Documents by form from the label tree on the left side of the label management screen.
- To add a label, click the add "+" button at the top right of the screen.
- To add new a label below an existing label, click the "+" button with the label selected. If no label was selected, then a label will be created at the topmost layer.

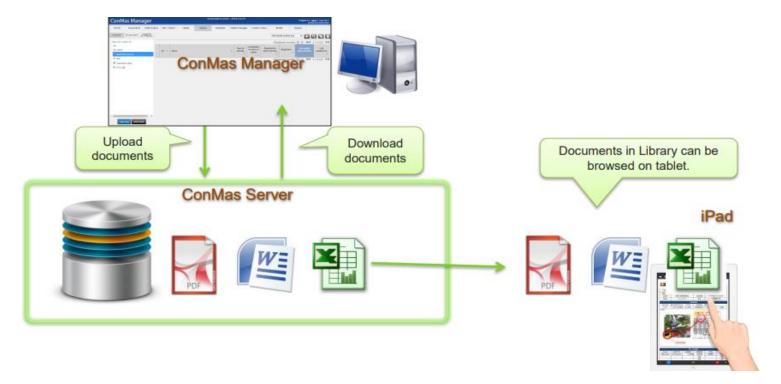


#### Managing Library

To manage library, all operations is executed in Manage.

- Library has two classifications: "Common" and "Document by form".
- Documents can be stored with hierarchical label.
- Authority can be set by group for each label.
- Authority can be set by group for each document.

(You can manage the reference authority in the same way as the Forms and Documents.)



#### Available file format

Following types of files are available.

- MS Office documents in Excel, Word, and PowerPoint
- PDF
- Images (jpg/gif/png)
- Audio (mp3/wma/wav)
- Video (mp4/mov)
- 3D viewer "iXVL" by Lattice Technology Co., Ltd.
- Web page URL

#### Freedraw image

Register the images that can be used in the FreeDraw in the iOS app.

§Feature of FreeDraw image document

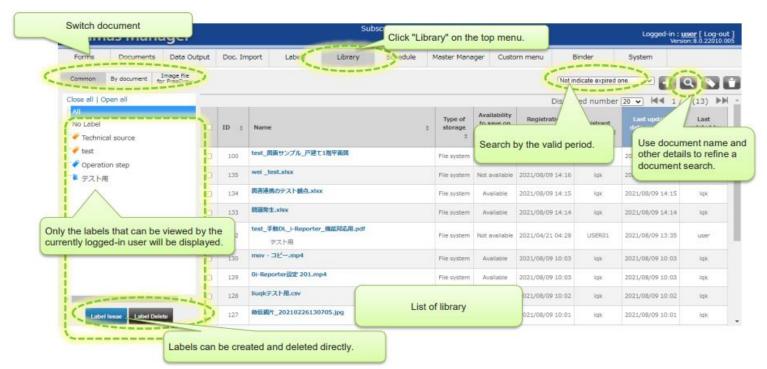
- Images handled by Fr library, and saved on the iPad itself.
- Click the dedicated icon on the FreeDraw screen of the iPad to display the list, and you can register multiple images at once from there.



## List of library

List of documents in Manager.

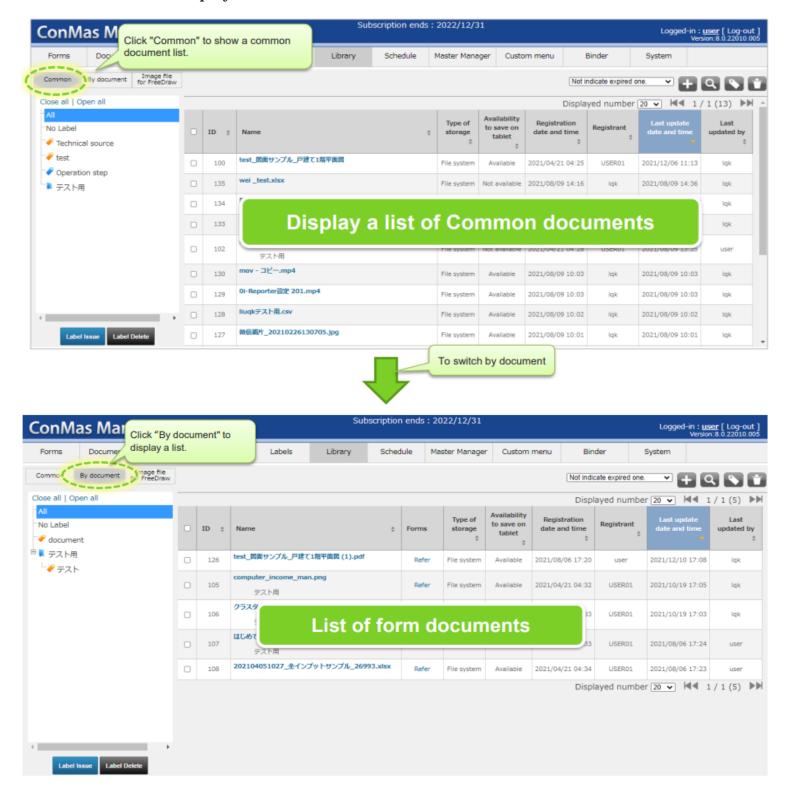
• Click top menu "Library", and display "Library management" screen. (if the user doesn't have an authority, the menu is not displayed.)



## Switching between Common and By document

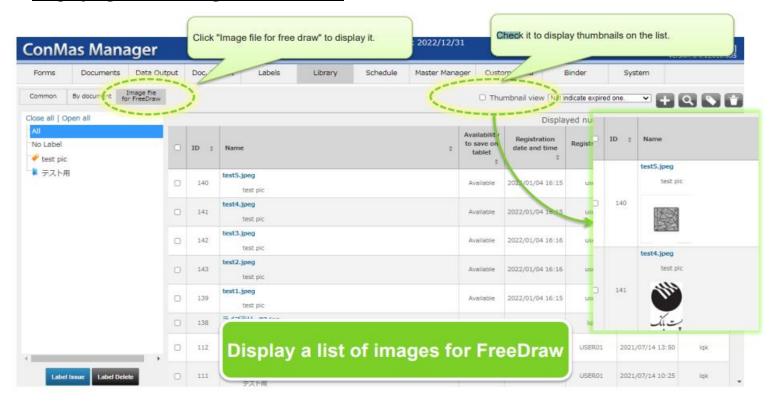
Click on the "Common" / "By document" toggle button at the top left of the screen to switch between common documents and form documents.

• The initial display shows "Common" list.



The method of operating is the same for both common and document by form.

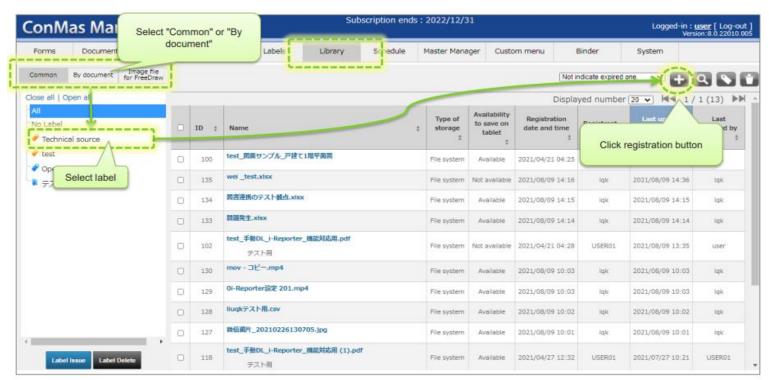
#### Displaying a list of images for FreeDraw



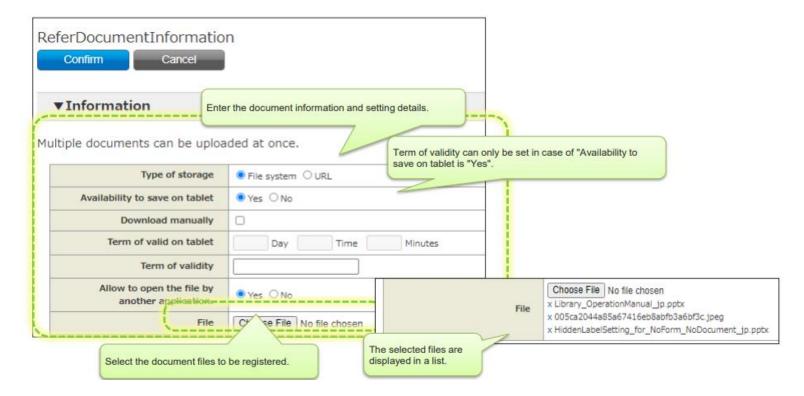
#### Register common / documents by form

Registering documents (Common and by form)

- Click "Library" on the top menu to display "Library management" screen.
- To add a document in library, click "+" button at the upper right of the screen.
- To add a new document with a label, click "+" button with the label selected.
- The label can also be designated on the next step.

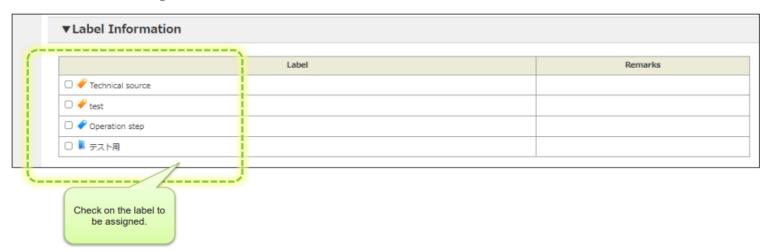


- In Common library, register three items: "▼Information", "▼Label Information",
- "▼ Another group permission settings ".
- In "By document", in addition to the above three items, register "▼Document which is linked to this file".
- Enter "▼Information", and select the documents to be uploaded.
- Up to 10 document files can be uploaded at once. When you select a file in File, a list of files is displayed below the file selection. You can delete it by clicking the "x" in front of the file name.
- Upload file name becomes "document name", and icon is automatically set by extension of the file. Enable to edit the file name after uploading.



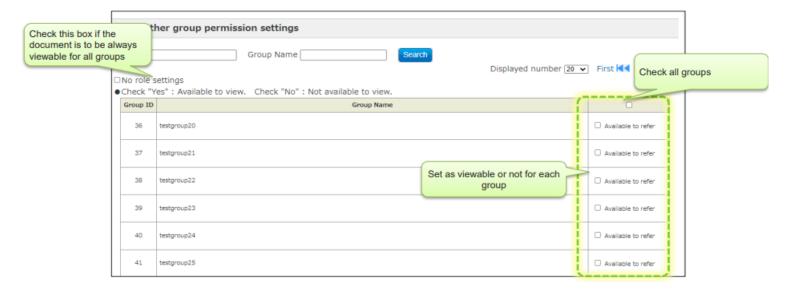
#### Set label.

- Under "▼Label Information", set the label to be put to the file.
- \* "Common library label" or "By document label" must have been created beforehand in label management.



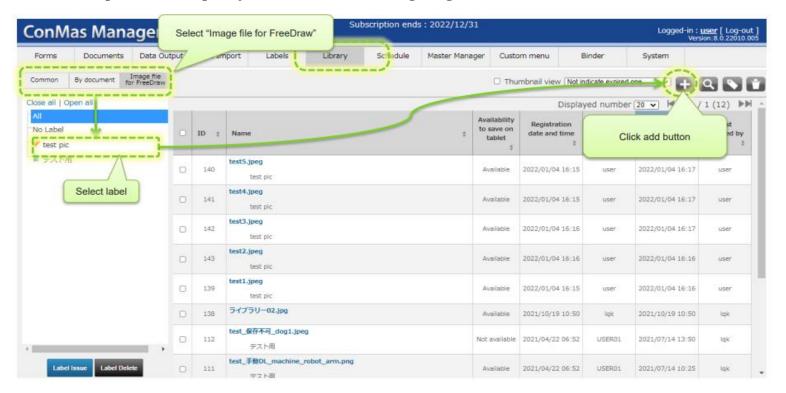
Set viewing authority for each group.

- Set the authority under "▼Another group permission settings".
- If "No role settings" is checked, all groups will be able to view

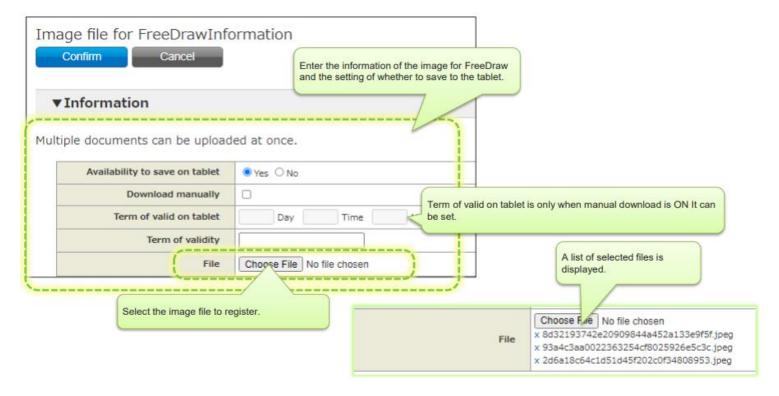


#### Register images for FreeDraw

- Click "Library" in the menu to display the "Library" screen, and click the image for FreeDraw.
- To add an image, click the Add [+] button at the top right of the screen.
- When add a new image to the label, select the label and click the Add [+] button.
- It possible to specify the label on the image registration screen.

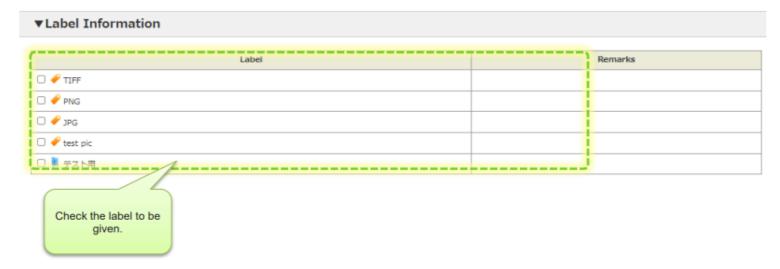


- Register "▼ Information", "▼ Label Information", and "▼ Another group permission settings ".
- First, enter "▼ Information" and select the image to upload.
- Up to 10 image files can be uploaded at once. When you select a file in File, a list of files is displayed below the file selection. You can delete it by clicking the "x" in front of the file name.
- The file name will be "Name" for the first upload. You can change it by editing it after the upload is completed.



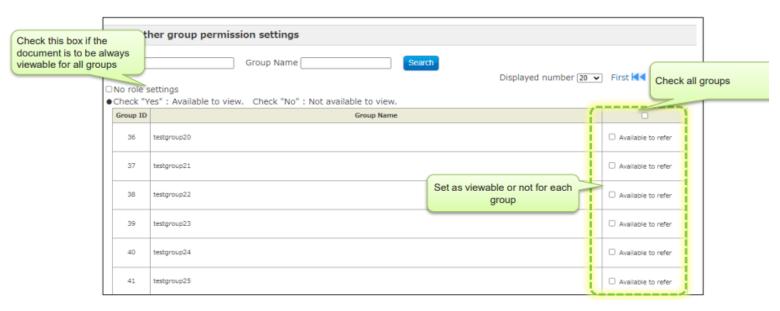
## Setting label.

- In "▼ Label information", set the label to be given to this image.
- \* It is necessary to create a label for "image for FreeDraw" in advance by label managemen



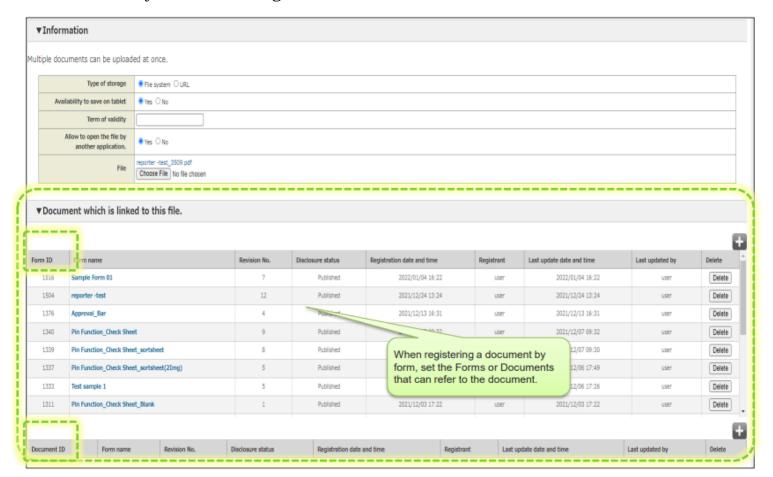
Set viewing authority for each group.

- Set the authority under "▼Another group permission settings".
- If "No role settings" is checked, all groups will be able to view.

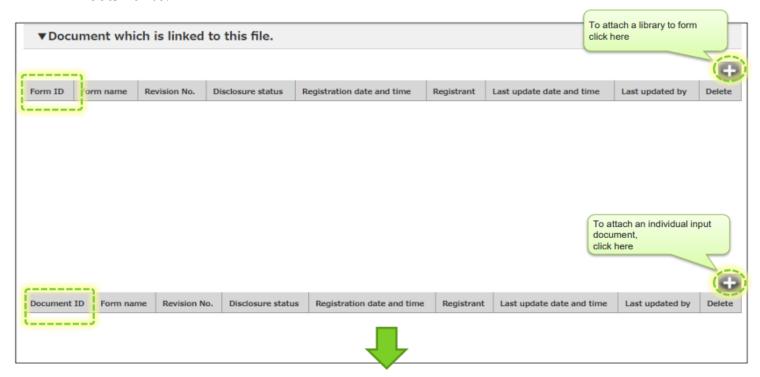


## Form allocation of documents by form

Documents by form can be registered for each of the Forms and document.

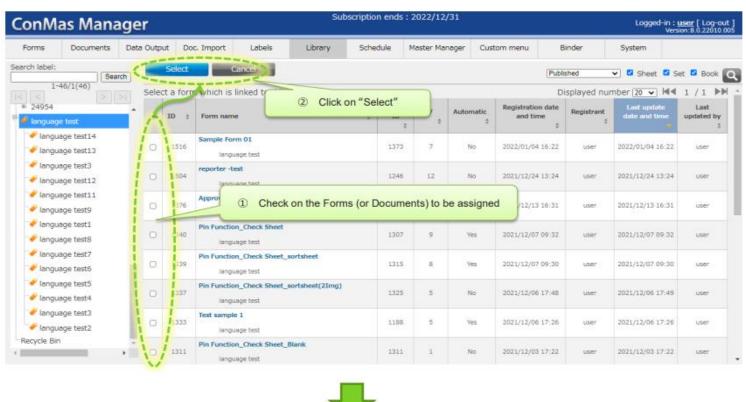


- Assign a Forms or Documents that can refer to a document by form.
- If assign a Forms, the Documents created from that Forms inherits the document information that can be referenced.
- To enable only an individual Documents to view the document, assign the individual Documents.



Select the Forms and Documents to view the document

- List of Forms or Documents is displayed.
- Check the Forms or Documents to be assigned from the list, and click the select button.



Register the document.

- Click on "Confirm" button to register the document.
- \*There is \*Confirm" button at the bottom of screen, Whichever you click is the same.



#### 10. Schedule menu

#### Using Schedule Management function

To use Schedule management function, following procedures on ConMas Manager are required Preparation

- 1. Set the authority groups for schedule management.
- 2. Register the task in task management.
- 3. Register public holidays.

#### Daily operation

- 1. Use Automatic document creation function to create input documents.
- 2. Register the schedule.

#### Registering task

- Select "System management/Task manager".
- "Task list" is displayed. Click "+" button to create new task.
- Enter the information in "Create task" screen. (Task ID is setting automatically.)



#### Editing and deleting tasks

- On the "Task list" screen, click on a registered task name to open the "Task edit" screen.
- Edit the task on the task editing screen.
- Check the task to be deleted from the list and click delete icon at the upper fight. Or, delete button at upper right in editing task screen, too.



## Registering public holidays

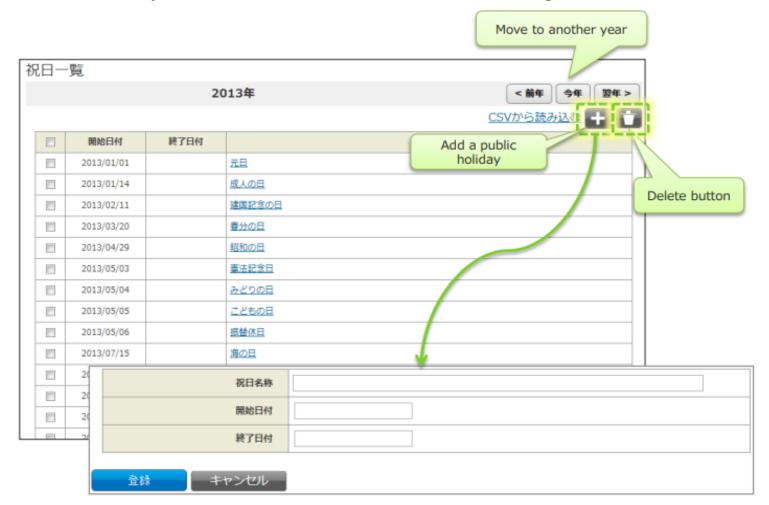
Setting public holidays

- Public holidays and weekend can be registered to display them on the calendar.
- Click on "To holiday setting" at the lower left of the schedule screen.



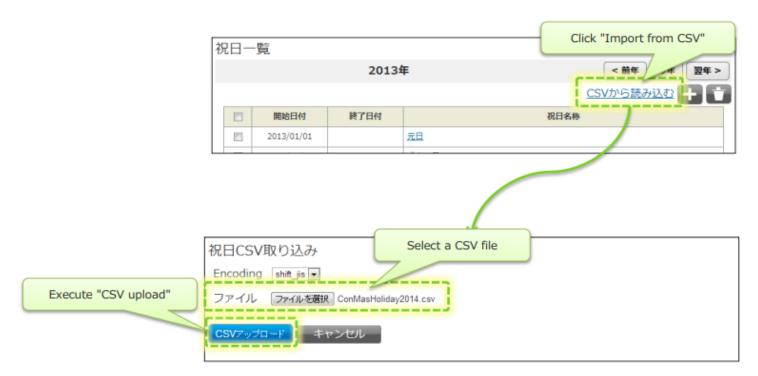
## Registering public holidays

- On the "Public holiday list" screen, a list of public holidays for the year is displayed for each year.
- To register a public holiday, click on the "+" button.
- Public holidays that are checked on the list can be deleted using the delete button.



## Registering public holidays from CSV

• "Import from CSV" enables public holiday information to be imported in a batch from a CSV file.



## Layout for public holiday setting CSV file

• The layout for CSV file for setting public holidays is as follows.

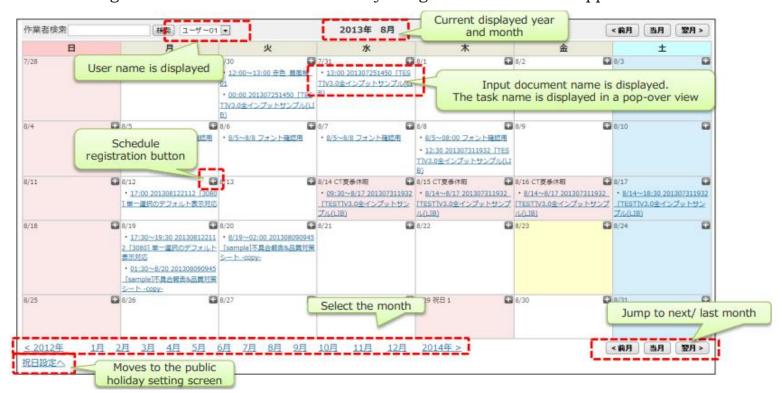
NO	Item	Description
1	Public holiday start date	Start date of public holidays. Mandatory item.
2	Public holiday finish date Finish dates of public holidays. If in identically holidays start date, May is omitted.	
3	Public holiday name	name Shou of public holidays. Mandatory item.

## Managing Schedule

Schedule management screen

Schedule management is conducted from "Schedule" on the menu.

- The administrator performs schedule registration for each user (worker).
- Items to be set are user, task, start/end date and time, comments, and relevant input document for this task.
- Registered schedule can be viewed by assigned user on tablet App.



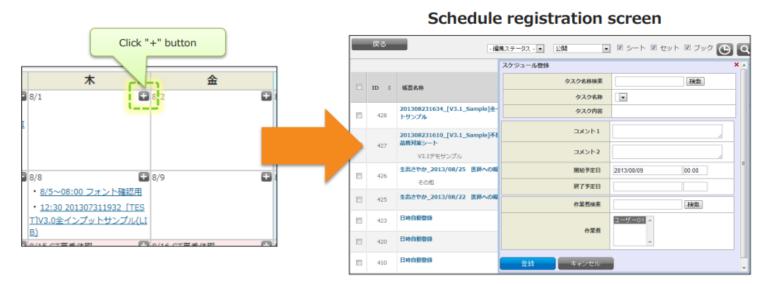
## Searching for worker name and switching the display



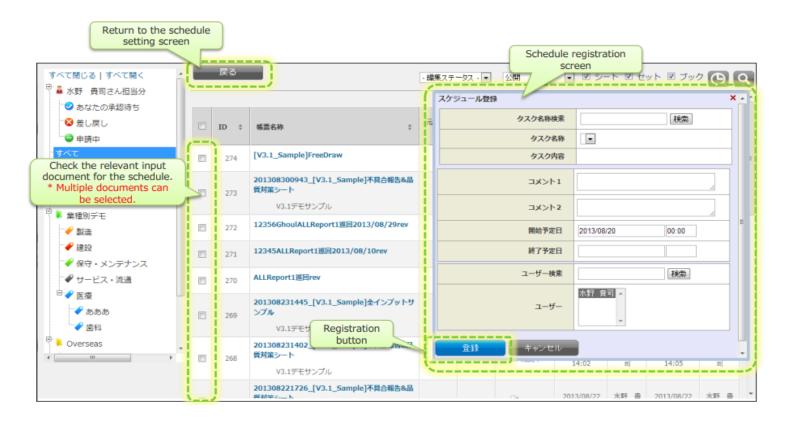
## Registering schedule from calendar

Register schedule for each worker from the calendar display screen.

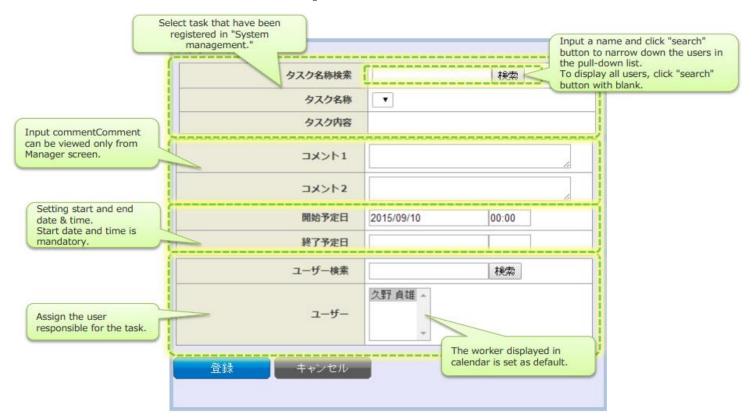
- Click "+" button at upper right of the date.
- Schedule registration screen is displayed.



- Click "+" button at upper right of the date for registering schedule.
- Schedule registration screen is displayed.
- In back of schedule registration screen, input document list screen is displayed. Select the relevant input document.

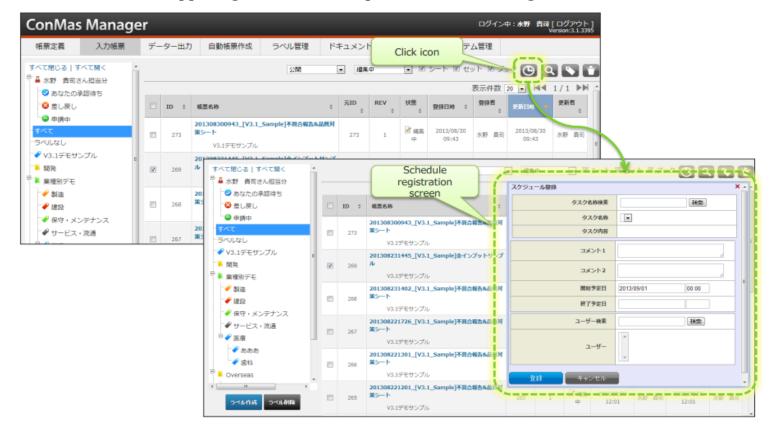


• From schedule registration screen, setting worker (login User), start/end date and time, task, comments, and relevant input document.



## Registering schedule from input document list

- Schedules can also be registered from the document list.
- Select an input document from the list and click the "Schedule" button with the clock icon at the upper right of screen to open the "Schedule registration" screen.



## Editing and deleting schedule

- Click an input document name displayed in each date to open the registration screen for that schedule.
- Click delete icon to delete the schedule. (Document will not be deleted.)

