

scoop[®]

Mobilize Your Business TM

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new feature

Scoop Activities: tasks, comments & filters

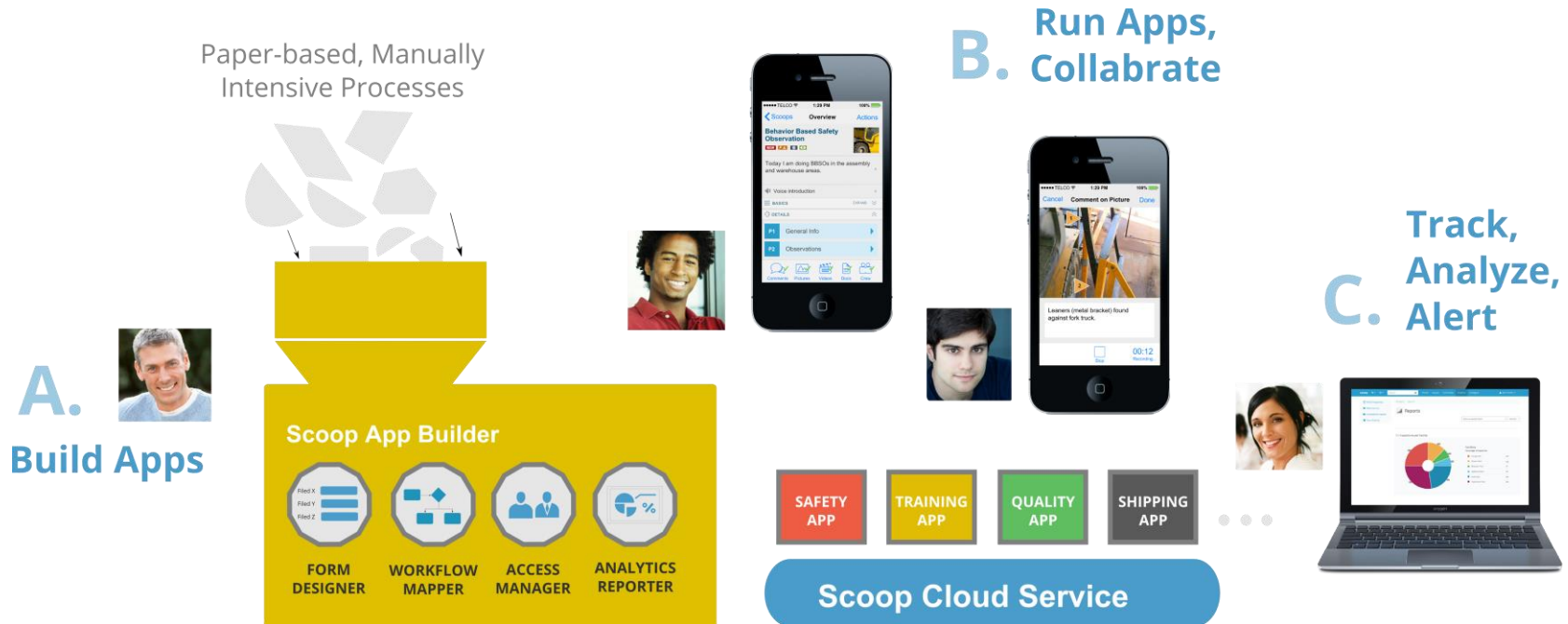


NEW FEATURE OVERVIEW

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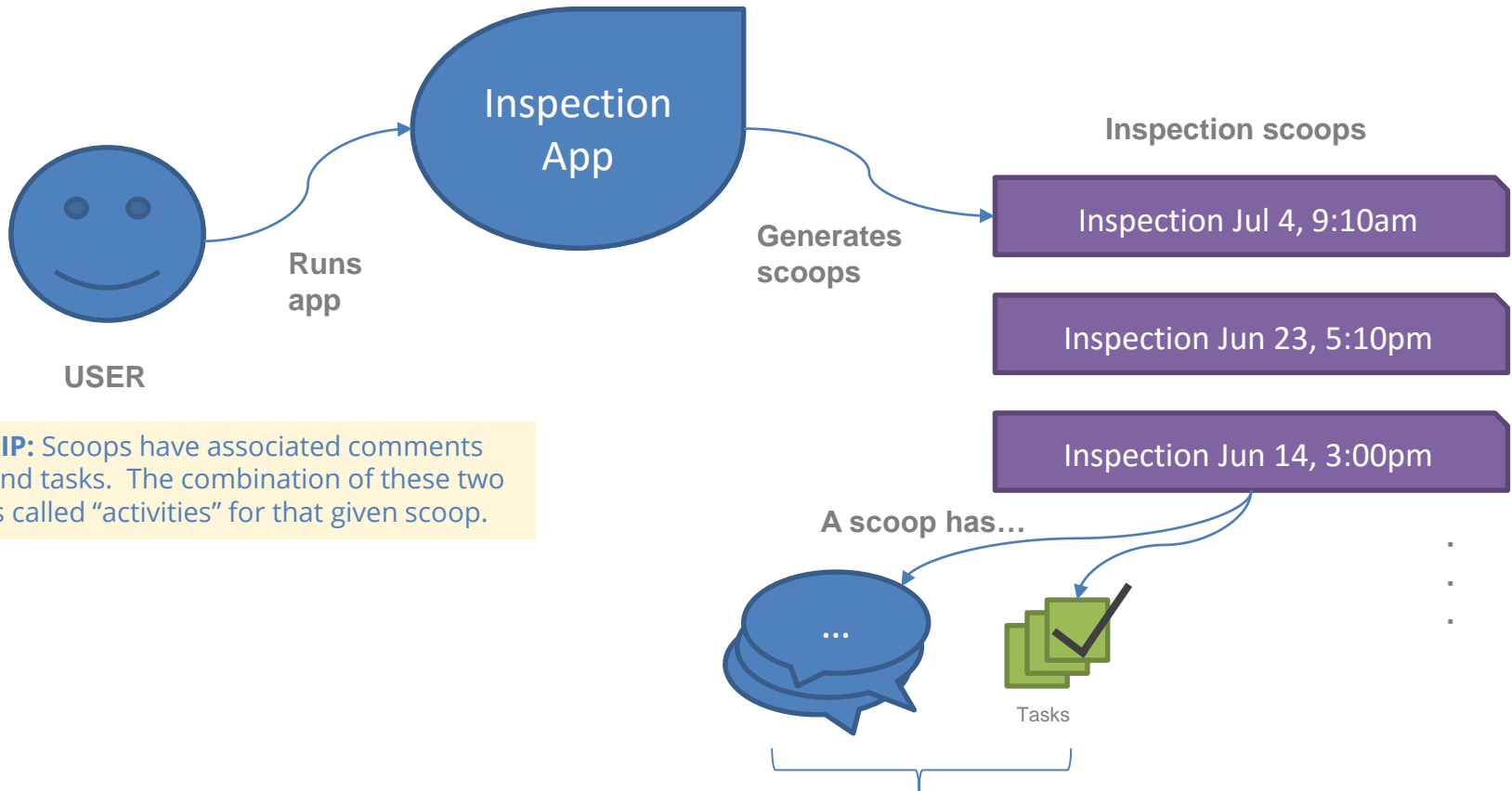
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Scoop apps allow users to report scoops (stories) about various activities as they go about their day while commenting and multimedia facilitate communication. Ultimately some activities result in the need for **corrective actions, to-do items and tasks**. The new **Activities** functionality allows teams to not only talk about issues via commenting but to assign tasks and track them to resolution.



Activities = Tasks + Comments

An important bit of terminology to understand first...



TIP: Scoops have associated comments and tasks. The combination of these two is called “activities” for that given scoop.

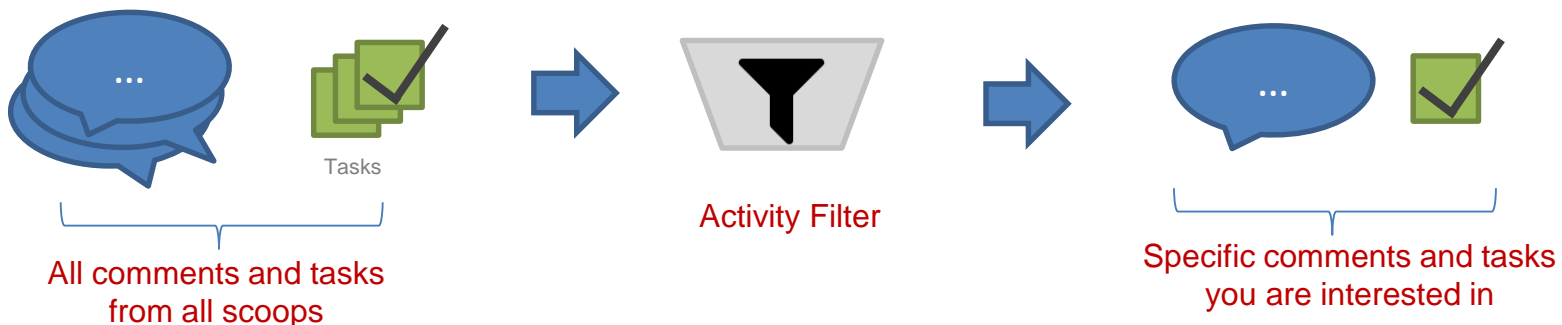
We refer to comments and tasks as *activities* of a given scoop

The Role of Activity Filters

Weekly update meetings, project status tracking and other “roll-up” functions often require managers to query, view and track lists of specific tasks. Examples include:

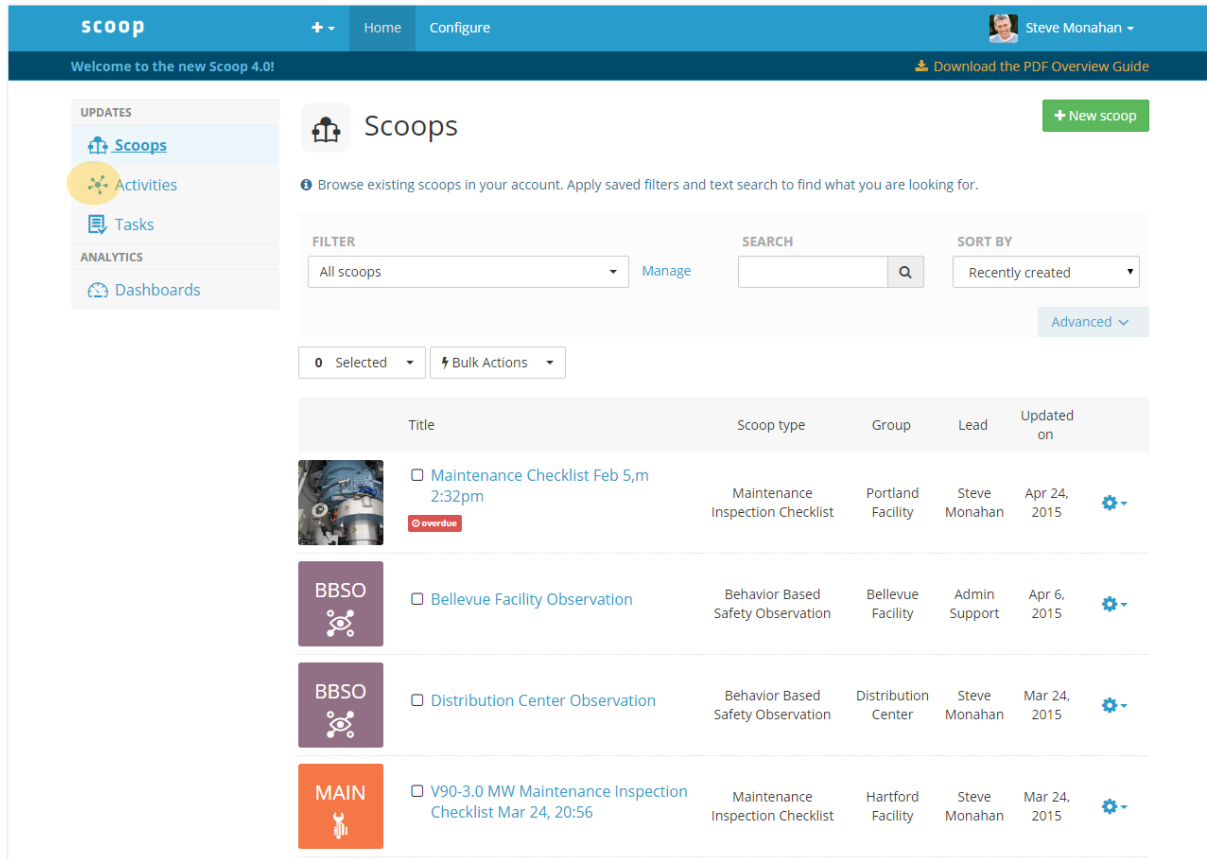
- All open tasks related to specific type of inspection for a given project
- All comments related to a specific form field in a quality checklist that is marked defective

In these and similar cases activity filters allow managers and team members to create specific search queries and therefore pull the right list of activities from the system. Activity filters are described further down in this guide.







Viewing Global Activities on Your App

ON THE WEB APP

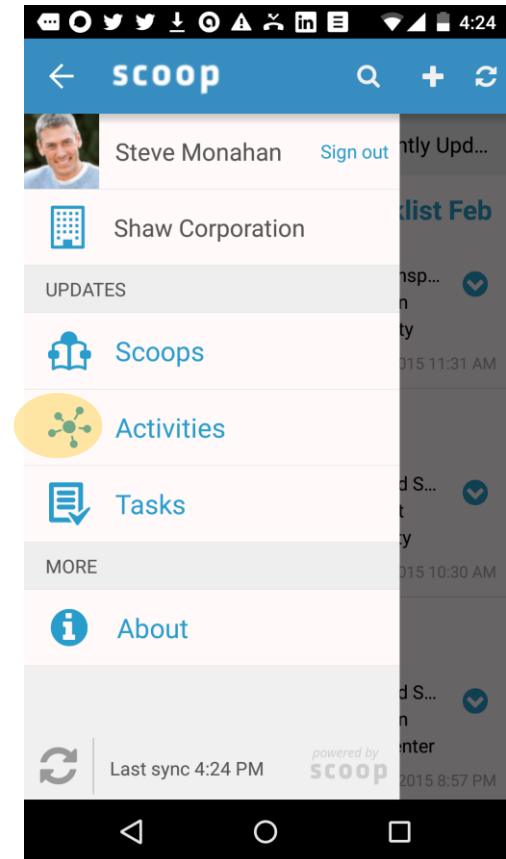


The screenshot shows the Scoop web application interface. The top navigation bar includes the 'scoop' logo, a '+ -' toggle, 'Home', 'Configure', and a user profile for 'Steve Monahan'. A welcome message 'Welcome to the new Scoop 4.0!' and a link to 'Download the PDF Overview Guide' are displayed. The left sidebar contains a menu with 'Updates' (Scoops, Activities, Tasks), 'Analytics' (Dashboards), and a 'Main' section. The 'Activities' option is highlighted with a yellow circle. The main content area is titled 'Scoops' and includes a '+ New scoop' button. Below the title, there is a search bar and a filter dropdown set to 'All scoops'. A table lists various activities, including 'Maintenance Checklist Feb 5, m 2:32pm', 'Bellevue Facility Observation', 'Distribution Center Observation', and 'V90-3.0 MW Maintenance Inspection Checklist Mar 24, 20:56'. Each activity entry includes a title, scoop type, group, lead, and update date.

Title	Scoop type	Group	Lead	Updated on
 Maintenance Checklist Feb 5, m 2:32pm	Maintenance Inspection Checklist	Portland Facility	Steve Monahan	Apr 24, 2015
 Bellevue Facility Observation	Behavior Based Safety Observation	Bellevue Facility	Admin Support	Apr 6, 2015
 Distribution Center Observation	Behavior Based Safety Observation	Distribution Center	Steve Monahan	Mar 24, 2015
 V90-3.0 MW Maintenance Inspection Checklist Mar 24, 20:56	Maintenance Inspection Checklist	Hartford Facility	Steve Monahan	Mar 24, 2015

TIP: Global activities show activities from all scoops in one place. This is a good list if you would like to see, search and filter all activities.

ON THE MOBILE APP



The screenshot shows the Scoop mobile application interface. The top navigation bar includes the 'scoop' logo, a search icon, a '+ -' toggle, and a refresh icon. The user profile 'Steve Monahan' is visible. A sliding menu is open, showing options: 'Scoops', 'Activities' (highlighted with a yellow circle), 'Tasks', 'About', and 'More'. The 'Activities' option is selected. The background shows a list of activities, including 'Shaw Corporation' and 'Maintenance Checklist Feb 5, m 2:32pm'. The bottom status bar shows the time as 4:24 PM and the text 'Last sync 4:24 PM'.

Switch to Activities from the sliding menu
(android: swipe right)
(iOS: tap on menu icon top left of screen)

Adding an activity – to a form field – web app

TIP: You can add an activity (comment or task) to each form field. This is the best option if the given activity is in fact related to a particular form field.

By doing this you preserve the relationship and can easily search and find all tasks or comments related to that field at a later time (using activity filters)

Form

ActivitiesMediaCrew

CancelSave

▼

1 Basic Information

Field name		Value	
1.1 System owner company name	?	Dyson	⚙️
1.2 System owner contact name	?	John Hertzell	⚙️
1.3 Equipment model being inspected*		P120 - 5200MW	⚙️
1.4 Date first commissioned	?	February 17, 2010	📅
1.5 Wind turbine manufacturer*		AREVA (France) Purchased Multibrid (Germany)	⚙️

2 comments1 media

New Comment
New task
Attach multimedia

Adding an activity – to a form field – mobile app

TIP:

1. Tap on the given field to open the field editing screen.
2. At the bottom of this screen use the Comment or Add Task icons to add the appropriate activity to this field.
3. Use “Related” to see any existing activities or media related to this particular field.

Form

John Hertzell

1.3 Equipment model being inspected *

P120 - 5200MW Tap...

1 media file 2 comments

1.4 Date first commissioned ?

February 17, 2010

1.5 Wind turbine manufacturer *

AREVA (France) Purchased Multibrid (Germany)

Equipment model being inspect...

Please select a choice (required)

[blank]

P90 - 1200MW

P90 - 3200MW

P120 - 5200MW ✓

P120 - 9200MW

P300 - 15000MW

Adding an activity – to a scoop – web app

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TIP:

Sometimes an activity is not related to a form field within a scoop but rather it is more generally related to the given scoop.

In these cases you may add an activity via the “Activities” folder of the particular scoop. Use the + icon to do this.

You can also select to see All activities, Comments or Tasks separately for the particular scoop by selecting the appropriate tab.

The screenshot displays the Scoop web application interface. At the top, a blue header bar contains the 'scoop' logo, navigation links for '+', 'Home', and 'Configure', and a user profile for 'Steve Monahan'. Below the header, a dark blue banner reads 'Welcome to the new Scoop 4.0!' and includes a link to 'Download the PDF Overview Guide'.

The main content area is divided into two sections. On the left, a sidebar under the heading 'UPDATES' lists 'Scoops', 'Activities', 'Tasks', and 'Dashboards'. The 'Activities' section is currently selected. The right section displays a 'Maintenance Checklist Feb 5,m 2:32pm' with a 'SCOOP' icon and an 'Actions' button. Below the title, a table lists details: SCOOP TYPE (Maintenance Inspection Checklist), STAGE (Draft), GROUP (Portland Facility), PRIORITY (Normal), LEAD (Steve Monahan), DUE DATE (September 30, 2015), CREATED ON (February 2, 2015 9:27 PM), LAST MODIFIED ON (August 26, 2015 4:59 PM), and DESCRIPTION (We performed a key inspection in the nacelle area today.). Navigation tabs for 'Form', 'Activities', 'Media', and 'Crew' are shown below the table.

Below the table, a section titled 'All Activities' (selected), 'Comments', and 'Tasks' shows a comment by 'Steve Monahan' from 'Northwest > Portland Facility' added on April 24, 2015 at 11:31 AM. The comment text is 'I could feel quite a bit of vibration on the main transfer housing shown here especially at the sprocket shown.' and is accompanied by a photo of a mechanical sprocket.

Adding an activity – to a scoop – mobile app

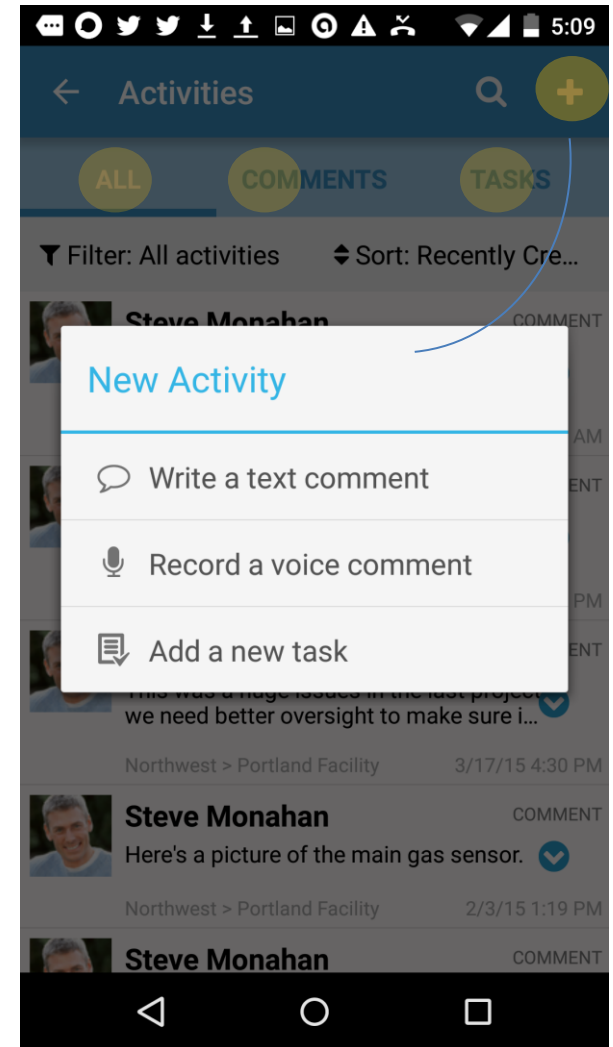
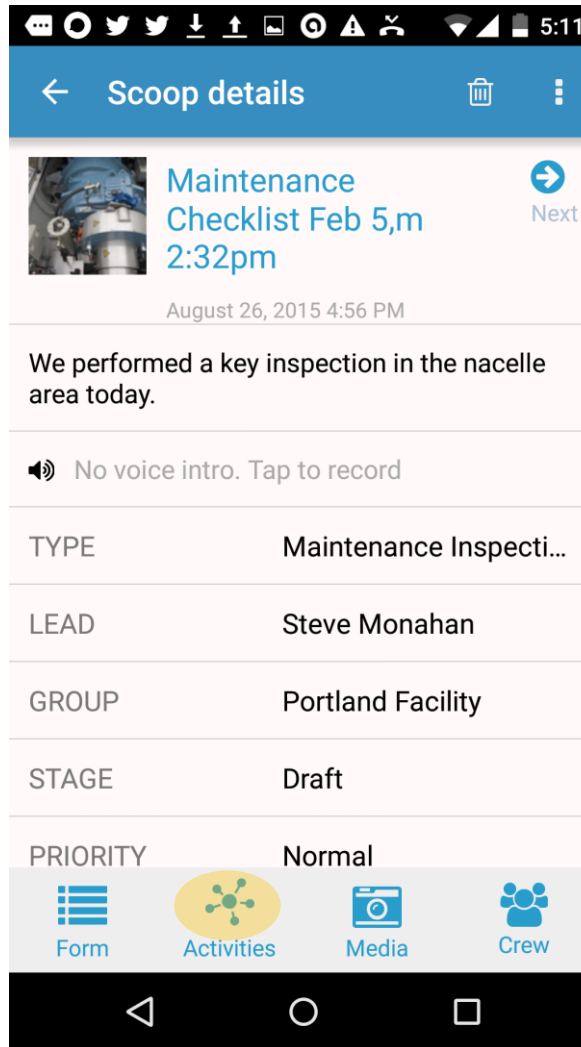
TIP:

Sometimes an activity is not related to a form field within a scoop but rather it is more generally related to the given scoop.

In these cases you may add an activity via the “Activities” tab of the particular scoop.

Tap on this tab then use the + icon to add the new activity

You can also select to see “All activities”, just Comments or just Tasks separately for the particular scoop by selecting the appropriate tabs highlighted on the right.



Activity Filters – Find What's Important

Depending on your role and job function you will likely have different needs when it comes to locating the right activities:

- **By individual scoop:** You want to find all comments or tasks related to a particular scoop (say a specific inspection or issue report done last week)
How to: find the particular scoop then look in its activities folder
- **By scoop type:** You want to find all comments or tasks related to a particular *type* of scoop (i.e., created using a specific app) **How to:** create a filter and specify the app type(s) and a date range
- **By scoop field:** You want to find all comments or tasks related to a particular *type* of scoop (i.e., created using a specific app) and a particular field **How to:** create a filter and specify the app type(s) and the specific field(s)

TIP: These are just some examples. Activity Filters allow you to specify a highly customized set of criteria to find comments and or tasks related to one or more scoop types.

Add an Activity Filter – Web App

TIP:

1. Visit the (global) Activities page.
2. Switch to “Advanced” filter (causes panel to slide down with extended filtering options)
3. Specify necessary filter parameters to search for the types of activities that you wish to find (see an upcoming slide for list of what each parameter type and purpose)
4. If you wish to recall this filter at a later time, provide a name and hit Save (or skip this step) Note: any filters you save, will be available view the Filter drop-down (5) as well as on the mobile app under Activities.
6. Press Apply to view the results of your filter.

The screenshot shows the Scoop web application interface. At the top, there's a navigation bar with 'scoop', '+', 'Home', and 'Configure'. A user profile for 'Steve Monahan' is on the right. Below the navigation bar, a welcome message says 'Welcome to the new Scoop 4.0!' and a link to 'Download the PDF Overview Guide' is present. The main content area is titled 'Activities' and includes a sub-header 'This is a list of activities from all scoops. Activities include comments and tasks.' Below this, there are tabs for 'All Activities', 'Comments', and 'Tasks'. A 'FILTER' section contains a dropdown menu labeled 'All' (callout 5) and a 'Manage' link. To the right of the filter section is a 'Basic' toggle (callout 2). The filter section is divided into several columns: 'KEYWORDS' with a text input 'Type in keywords'; 'ACTIVITY TYPE' with a dropdown 'All'; 'RELATED GROUPS' with a dropdown 'All'; 'CREATED DATES' with a dropdown; 'SCOOP TYPES' with a dropdown 'All'; 'FORM VALUES' with a dropdown 'All' and an info icon; 'AT THESE STAGES' with a dropdown 'All' and an info icon; 'SCOOP PRIORITY' with a dropdown 'All'; 'TASK ASSIGNEES' with a dropdown 'All' and an info icon; 'TASK STATUS' with a dropdown 'All' and an info icon; 'RELATED FORM FIELDS' with a dropdown 'All' and an info icon; and 'SORT RESULTS BY' with a dropdown 'Recently updated'. At the bottom of the filter section are 'Apply' and 'Reset' buttons (callout 6). Below the filter section is a 'SAVE ABOVE AS NEW FILTER' section with a text input 'Enter filter name' (callout 4), a 'SAVE' button, and a 'manage filters' link. Callout 1 points to the 'Activities' link in the left sidebar under the 'UPDATES' section. Callout 3 points to the filter section.

Add an Activity Filter – Mobile App

TIP:

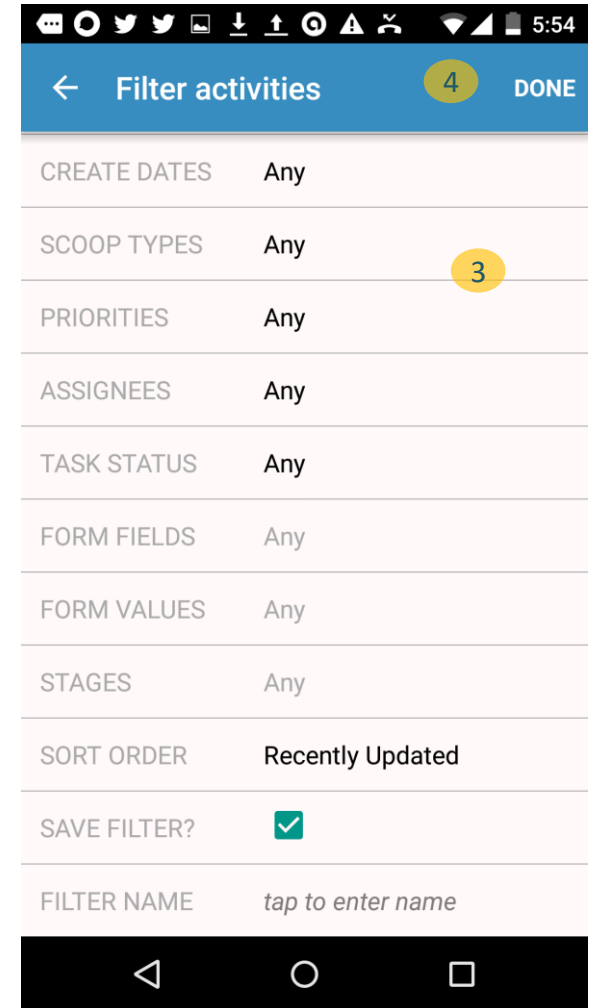
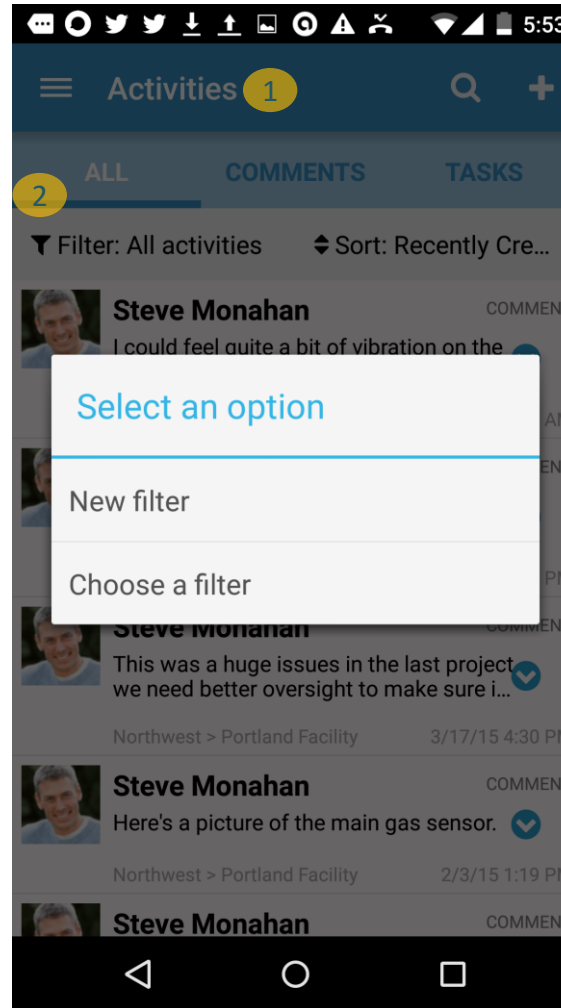
1. Visit the (global) Activities screen from the sliding menu on the home screen of the app (iOS: use menu icon at top left of screen)

2. Tap on filter and select an options (New, Choose)

3. Specify filter parameters by using the various options. If you wish to recall this filter at a later time, check the “Save filter?” checkbox, provide a name and hit Done at the top of the screen (or skip this step)

Note: any filters you save, will be available via the Filters list on the mobile and web apps (filters are synched)

4. You can also just press Done without saving the filter as a named filter. I



Activity Filter – details of parameters 1

TIP:

When filtering activities you can specify a number of parameters most of which are intended to narrow down the scoops to which the activities are related.

The activities you are seeking...

1. Do they have any specific keywords
2. What type are they: tasks, comments or both
3. To which groups in the organization are they related
4. When were these activities created

The screenshot shows the 'Activity Filter' interface. It features a grid of filter categories, each with a numbered callout (1-4) in a yellow circle. Callout 1 points to the 'KEYWORDS' section, which has a text input field containing 'Type in keywords'. Callout 2 points to the 'ACTIVITY TYPE' section, which has a dropdown menu set to 'All'. Callout 3 points to the 'RELATED GROUPS' section, which has a dropdown menu set to 'All'. Callout 4 points to the 'CREATED DATES' section, which has a dropdown menu. Below the grid are 'Apply' and 'Reset' buttons. At the bottom, there is a 'SAVE ABOVE AS NEW FILTER' section with a text input field 'Enter filter name', a 'SAVE' button, and a 'manage filters' link. A 'Basic ^' tab is visible in the top right corner of the filter panel.

1	2	3	4
KEYWORDS <input type="text" value="Type in keywords"/>	ACTIVITY TYPE <input type="text" value="All"/>	RELATED GROUPS <input type="text" value="All"/>	CREATED DATES <input type="text"/>
SCOOP TYPES <input type="text" value="All"/>	FORM VALUES ⓘ <input type="text" value="All"/>	AT THESE STAGES ⓘ <input type="text" value="All"/>	SCOOP PRIORITY <input type="text" value="All"/>
TASK ASSIGNEES ⓘ <input type="text" value="All"/>	TASK STATUS ⓘ <input type="text" value="All"/>	RELATED FORM FIELDS ⓘ <input type="text" value="All"/>	SORT RESULTS BY <input type="text" value="Recently updated"/>

Apply **Reset**

SAVE ABOVE AS NEW FILTER **SAVE** [manage filters](#)

Activity Filter – details of parameters 2

5. What type of scoops do they belong to
6. Are they related to scoops where a form field has a certain value
7. Are they related to scoops that are at a specific stage
8. Are they related to scoops that have a certain priority
9. If looking for tasks, are these assigned to a specific person(s),
10. Do the tasks you're looking for have a certain status
11. Are these activities related to a form field (regardless of value assigned to that field in the scoops)
12. How should the results of the filter be sorted
13. Enter a name to save your filtering parameters if you wish to use the same filter later

The screenshot shows the 'Activity Filter' interface. At the top right is a 'Basic ^' tab. The filter is organized into a grid of dropdown menus. Callout 5 points to the 'SCOOP TYPES' dropdown. Callout 6 points to the 'FORM VALUES' dropdown. Callout 7 points to the 'AT THESE STAGES' dropdown. Callout 8 points to the 'SCOOP PRIORITY' dropdown. Callout 9 points to the 'TASK ASSIGNEES' dropdown. Callout 10 points to the 'TASK STATUS' dropdown. Callout 11 points to the 'RELATED FORM FIELDS' dropdown. Callout 12 points to the 'SORT RESULTS BY' dropdown, which is currently set to 'Recently updated'. Callout 13 points to the 'Enter filter name' input field. Below the filter grid are 'Apply' and 'Reset' buttons. At the bottom, there is a 'SAVE ABOVE AS NEW FILTER' button, the 'Enter filter name' input field, a 'SAVE' button, and a 'manage filters' link.

KEYWORDS	ACTIVITY TYPE	RELATED GROUPS	CREATED DATES
<input type="text" value="Type in keywords"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text"/>
SCOOP TYPES 5	FORM VALUES 6	AT THESE STAGES 7	SCOOP PRIORITY 8
<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="All"/>
TASK ASSIGNEES 9	TASK STATUS 10	RELATED FORM FIELDS 11	SORT RESULTS BY 12
<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="Recently updated"/>

[manage filters](#)