



User Guide

1st Edition 2017
Clipboard is Created by
-Field Inspections Plus-

Preface

Welcome to **Clipboard!** Managing your projects, customers and reports just got much easier.

Now that you are moving to a paperless solution, we need to get you started with the transition. There are a few things that are critical to helping you get moving quickly. First item of business is to move your existing customer list into **Clipboard** so that you may associate it with the projects you intend to create. This can be accomplished manually by quickly adding new customers – see [Chapter 1](#) as a reference. Additionally, we can add your entire list customers for you, if you export your current customer list to an excel format and send the file to our support team.

Secondly, we will demonstrate how to add new team members to a project. Once you have added your team to projects, which takes minutes, you can deploy your projects to them live in the field while they are working, or while they are in transit. They are able to take the **Clipboard** offline with our feature that needs no wifi or cell signal to operate, collect data on **Clipboard**, and then synchronize their collected information with the home office server. This feature and many more, are covered in [Chapter 2](#).

Thirdly, we need to get your inspection forms created in your new **Clipboard** space. One of our trainers will spend time getting you trained to create these forms at your convenience. Once trained, normally a 1 to 2 hour process, you will then be able to tailor your own forms, at will. **Clipboard's** user friendly interface allows you to have full control over your library of forms. You never have to wait on someone to alter or get creative with your reports. In [Chapter 5](#), you will find all of the information you need to get really creative with your inspection forms and how they can be organized in the project equipment tree.

We are here to make your transition to **Clipboard** a success. We also understand that this is your business and value the importance of making sure you do not see any disruption to your daily activities. **Clipboard** trainers will reach out to work with you after hours and weekends, if that is what your schedule permits. Simple! Make an appointment at support@fieldip.com, when you need additional support calls or web meetings.

[\(Return to Table of Contents\)](#)

Table of Contents

Chapters

[Preface - Welcome to Clipboard](#)

[Preface - How to Log In](#)

[1. Create a Customer](#)

[Building Customers](#)

[Projects Associated with Customers](#)

[Privacy and Security](#)

[FAQ](#)

[2. Building Additional Teams Members](#)

[Creating New Team Member](#)

[Team Member *Roles* - Level of Access](#)

[Key Points](#)

[FAQ](#)

[3. Project Creation](#)

[Project Form](#)

[Project Organization](#)

[4. Template or Form Creation](#)

[Creating Equipment Templates](#)

[Managing Formulas](#)

[Managing Templates](#)

[5. Creating Equipment Trees in Projects](#)

[Appendix](#)

[A. Troubleshooting Browser Issues](#)

[1. Internet Explorer](#)

[Delete Browser History and Clear Cache and Cookies](#)

[Update Browser](#)

[2. Safari](#)

[Delete Browser History](#)

[Clear Cache and Cookies](#)

[Update Browser](#)

[\(Return to Table of Contents\)](#)

[3. Chrome](#)

[Delete Browser History](#)
[Clear Cache and Cookies](#)
[Update Browser](#)

[4. Mozilla Firefox](#)

[Delete Browser History](#)
[Clear Cache and Cookies](#)
[Update Browser](#)

[B. Downloading Clipboard](#)

[C. Technical Information](#)

[D. Collateral Documents](#)

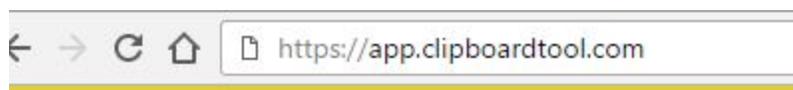
[Prospective Customer Questionnaire](#)
[Training Agenda](#)
[Additional Applications That Will Help](#)
[Android Applications That Will Help](#)

[\(Return to Table of Contents\)](#)

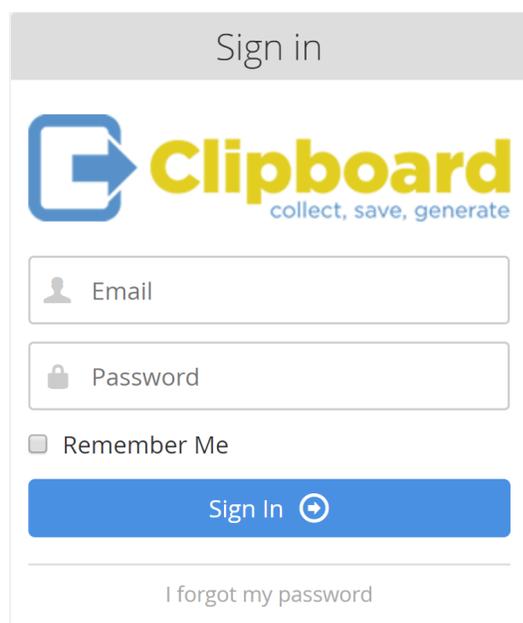
How to Log in:

On a PC, laptop, phone or tablet, bring up an internet browser, i.e., Internet Explorer, Mozilla, or, our suggested source, Chrome. All of these will bring up **Clipboard**.

Use or Click on this link: **app.clipboardtool.com**



With this done, the **Clipboard** login screen will appear.

A screenshot of the "Sign in" login screen for the Clipboard application. The screen has a grey header with the text "Sign in". Below the header is the Clipboard logo, which consists of a blue square with a white arrow pointing right, followed by the word "Clipboard" in yellow and the tagline "collect, save, generate" in blue. There are two input fields: "Email" with a person icon and "Password" with a lock icon. Below these fields is a checkbox labeled "Remember Me". A blue button with the text "Sign In" and a right-pointing arrow is positioned below the checkbox. At the bottom of the form, there is a link that says "I forgot my password".

The user enters his/her email address and password in the fields shown above. After entering the email address, check the box next to "Remember Me" to store the email address on a private computing device. (User Tip - we recommend against the practice of saving a username and password to a public machine. Hackers can otherwise access the **Clipboard** space. Only if the device is private, do we suggest using this feature.) Beneath the "Sign In" panel, if necessary, click on the "I forgot my password." An email to reset the password will be sent to the user.

Once the user enters the Username and Password correctly, he/she enters the **Clipboard** space. It will be completely empty except for the Demo Tester in the Team tab.

Let's Get Started!

[\(Return to Table of Contents\)](#)

Chapter 1: Create a Customer

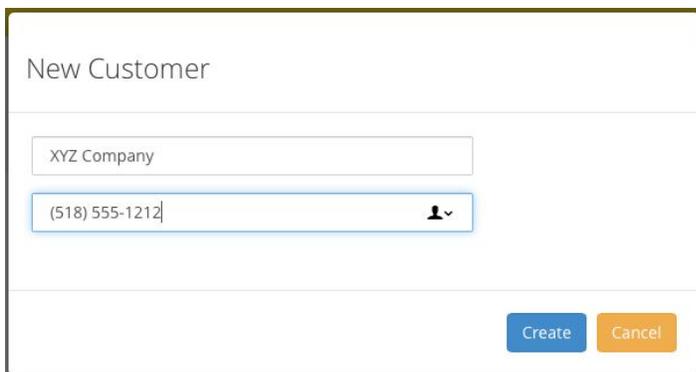
Building Customers

Clipboard has a built-in feature that assists with customer management. This feature allows small business owners to manage basic activity levels with customers, watch saturation levels for work with specific customers, and quickly manage all contacts in a company from Project Managers to Purchasing Agents and CEO's. Once the user creates customers, he/she will be able to call, email, or text these individuals right from the **Clipboard** screen (depending on the device being used and the hardware on the device).

When the user logs into **Clipboard** for the first time only, he/she will see the following screen because the user has not created any customers yet in the company's *Clipboard Cloud Space*. To create a customer, click on the blue *Customer* hyperlink:



Clicking on this link opens a *New Customer* form. Supply a company name and a phone number. Click the [Create](#) button. This creates a customer record.

A screenshot of a "New Customer" form. The title "New Customer" is at the top left. Below it are two input fields: the first contains "XYZ Company" and the second contains "(518) 555-1212" with a dropdown arrow on the right. At the bottom right of the form are two buttons: a blue "Create" button and an orange "Cancel" button.

[\(Return to Table of Contents\)](#)

Once the initial customer is created, **Clipboard** opens an enhanced information form to add more fields of data, including: phone and fax numbers, address, and company contacts. Users can then add contact information for each of the company's personnel including, name, title, email, and phone number information. **Clipboard** permits the user to call or email right from his/her device.

The screenshot displays the 'Clipboard' application interface. At the top, there is a navigation bar with tabs for 'Projects', 'Customers', 'Team', and 'Equipment Templates'. The 'Customers' tab is currently selected. Below the navigation bar, the main content area shows the details for 'XYZ Company'. The company name is displayed in a large blue font. Below it, there is a phone number '(518) 555-1212', a status 'empty', and a toggle for 'Active'. The address section includes input fields for '123 Main Street', 'address line 2', 'Anytown', 'NY', and '12208', with a blue checkmark and a grey 'x' button. Under the 'Contacts' section, two contacts are listed: 'Joe Smith General Contractor - (518) 555-1212 J.Smith@XYZco.com' and 'Ken Jones Electrical Contractor - (518) 555-1212 K.Jones@XYZco.com'. On the right side of the interface, there is a yellow 'Active Projects' button with a red arrow pointing to it, and a grey 'View All Projects' button below it.

[\(Return to Table of Contents\)](#)

Projects Associated with Customers

On this *Customers* screen the user has access to other important customer information. An *Active Projects* navigation box is located to the upper right side of the screen (see above). Clicking on the *View All Projects* link takes the user from the *Customers* tab to the *Projects* tab, which shows all of the active projects associated with that particular customer. This feature allows quick and easy access to all the current or completed projects with one customer.

Project #	Name ↓	Status	Complete	Last Sync
12230	Albany International Airport Bldg. 79 AHU Upgrades	Active	22%	
12092	Albany Medical Center M Basement Linear Accelerator	Active	100%	1/10/17
12092-PD	AMC Linear Accelerator (PreDemo)	Active	100%	
12228-P1	AMC M7 Cath Lab (Phase 1)	Active	100%	
12228-P2	AMC M7 Cath Lab (Phase 2)	Active	0%	
12228-PD	AMC M7 Cath Lab (Pre Demo)	Active	100%	
12228EUFP	AMC M710/714 Cath Lab (Existing Unit Final Phase)	Active	39%	
12228-FP	AMC M710/714 Cath Lab (Final Phase)	Active	37%	
11606-Aud	Mt Pleasant MS Auditorium	Active	100%	
11606 EF-9	Mt. Pleasant Middle School EF-9	Active	88%	3/2/16

First Previous 1 2 Next Last

[\(Return to Table of Contents\)](#)

Click back on the *Customers* tab.

Knowing how much active work the business currently has with an individual customer allows the business owner to assess quickly, saturation levels with that given customer. For example, a quick glance that reveals a dwindling number of active projects leads the business to re-engage that customer for more work. For example, see in the screenshot below that MTI's customer, Downstate Fabricators Heating, Cooling & Sheet Metal Co., currently has 1 active project from a historical 6 total projects.



The screenshot shows a software interface with a navigation bar at the top containing tabs for 'Projects', 'Customers', 'Team', and 'Equipment Templates'. The 'Customers' tab is selected. Below the navigation bar is a search bar with a magnifying glass icon and the text 'search', and a dropdown menu currently set to 'Active'. To the right of the search bar is a green button with a plus sign and the text '+ Customer'. Below these elements is a table with the following data:

Name	Active Projects	Total Projects	Status
Downstate Fabricators Heating, Cooling & Sheet Metal Co.	1	6	Active

Having this information at the owner's or *Admin's* fingertips allows the business to make critical decisions quickly without having to pull up large progress reports from bookkeeping systems. Customers and job scope vary. Sometimes an administrator needs to have all of the critical information, but other times those needs may be limited to the degree of customer loyalty, the quantity of open work with that customer, decisions about performing additional services, change orders, etc.

[\(Return to Table of Contents\)](#)

Click on the *Projects* tab.

The next feature to look for on the *Projects* screen is the *Complete* column. This shows the current percent complete of the project. This percentage is based on the number of “required” answered questions associated with the forms in each project. (See the Form Creation [Chapter 4](#) for details on required questions in forms). Instead of having to call inspectors or technicians to inquire about the billable time on each job, administrators can reference the percent complete number of each project for billable time. This easy-to-read feature saves time in the office and eliminates disruption for the field personnel with an unnecessary phone call.

Project #	Name	Status	Complete	Last Sync
17-012-PD	KAPL C1 Building	Active	100%	
12351	KAPL G1 Room 131	Active	100%	
12307	KAPL KSO Building 118	Active	100%	
17-010	Keeseville Fire Station	Active	42%	
11736	Kinchen Library Renovations Phase 2	Active	98%	
17-114	Kingston CSD Field House Ph 2	Active	0%	
17-058	Kingston High School Phase 1	Active	0%	
12313-SA	Kingston HS Core Academic Wing Salzmann Air	Active	34%	
12313-EA	Kingston HS Core Academic Wing-East Wing Air	Active	35%	
12313-WA	Kingston HS Core Academic Wing-West Wing Air	Active	41%	

Privacy and Security

Click on the *Customers* tab.

It is very important to ensure that customer information is secure. To ensure security, **Clipboard** limits access to **Clipboard**'s records to only those who have a need to know. The *Notes* area on the *Customers* screen is a feature reserved for company administrators. The *Customers* tab can only be seen by top level roles, specifically, *Admin* and *Project Admin*, alone. (See User [Roles](#) Chart for more details on access levels.) Comments added and shared in the *Notes* text area can be candid as it is meant for internal conversations in regard to billing, customer service requests, customer history, etc. This feature serves as a

[\(Return to Table of Contents\)](#)

repository that allows tracking for the who, why and when of events that affect relationships with customers. These stored comments available for review help the business run on a more informed level.

Projects Customers Team Equipment Templates

XYZ Company

(518) 555-1212

empty

Active

Address

123 Main Street

address line 2

Anytown NY 12208

Contacts

Joe Smith *General Contractor* - (518) 555-1212 J.Smith@XYZco.com

Ken Jones *Electrical Contractor* - (518) 555-1212 K.Jones@XYZCo.com

+ Contact

Notes

Account like two copies of reports

May 16, 2017 12:39 PM

Copy Ken Jones on all emails.

May 16, 2017 12:39 PM

ADD ANOTHER NOTE HERE IN THE BOX

Active Project
View All Projects

[\(Return to Table of Contents\)](#)

FAQ's

1. Can I import our current client lists into **Clipboard**?

Yes. If you send us a list of your current clients in excel format we can map the data into **Clipboard** for you.

2. Who has access or can see the notes about our customers that appear on the customer overview screen?

Only administrators in your company can see this customer information. Customer notes will neither appear on any reports nor will they be seen by any view-only users.

3. Can any of my technicians see my customers information?

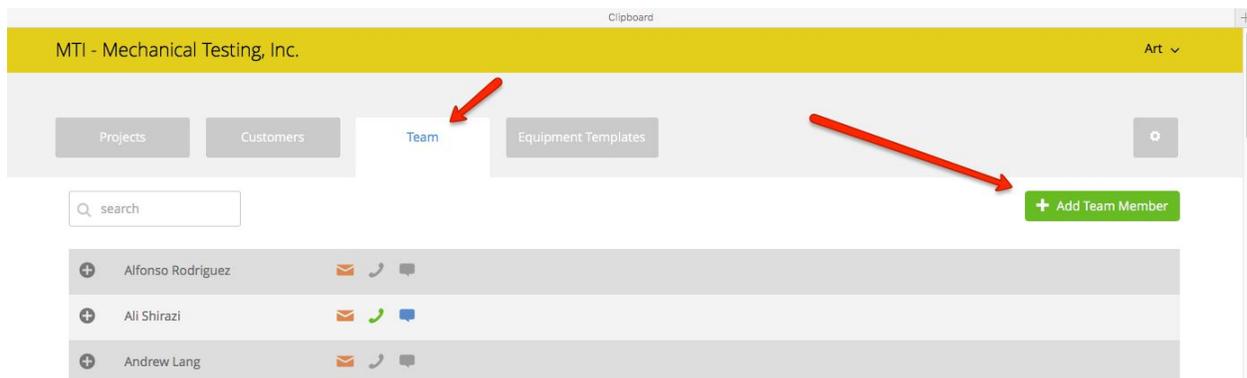
No. Only Admin and Project Admin level users can see your *Customers* tab. View Only, Answer Only, Field Technician and Project Foreman CANNOT access your *Customers* tab.

Chapter 2: Building Additional Team members

Creating a New Team Member

Click on the *Team* tab.

Clipboard allows the Admin to create team members at any time throughout phases of the project. The *Team* tab controls these actions. Click the **+ Add Team Member** located in the right margin of the browser screen.



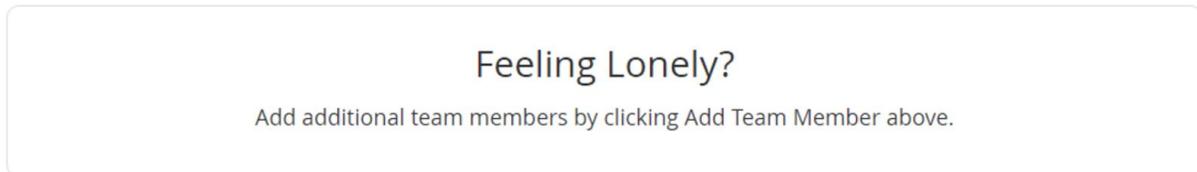
Clicking on the **+ Add Team Member** button, opens a form to enter the new team member's name and information. The user must supply a valid email address for new users in order to activate the form.

The screenshot shows the 'Add Team Member' form. At the top, there is a yellow header with the company name and a user profile icon labeled 'Art'. Below the header is a navigation bar with tabs for 'Projects', 'Customers', 'Team', and 'Equipment Templates'. The 'Team' tab is selected and highlighted. Below the navigation bar is a search bar and a list of team members. The form contains the following fields: First Name, Last Name, Email Address, Phone Number, Password, Mobile Number, Confirm Password, and Home Office (a dropdown menu). To the right of the form is a 'Roles' dropdown menu with the following options: Project Foreman, Answer Only, View Only, Project Admin, Field Tech, and Admin. At the bottom of the form are two buttons: 'Create User' (green) and 'Cancel' (orange).

[\(Return to Table of Contents\)](#)

To create the new team member, all fields must be completed except the phone numbers and *Home Office* selection. Nevertheless, we suggest filling in the home and mobile phone numbers for the technician in order to take advantage of the one touch calling or emailing feature that **Clipboard** provides. In the *Roles* section box, hover over the role intended for the new team member, then click to select. The Roles type also sets the team member's "Level of Access."

The image below shows what the user sees when creating the first user in the system during the demo:



Team Member Roles - Level of Access

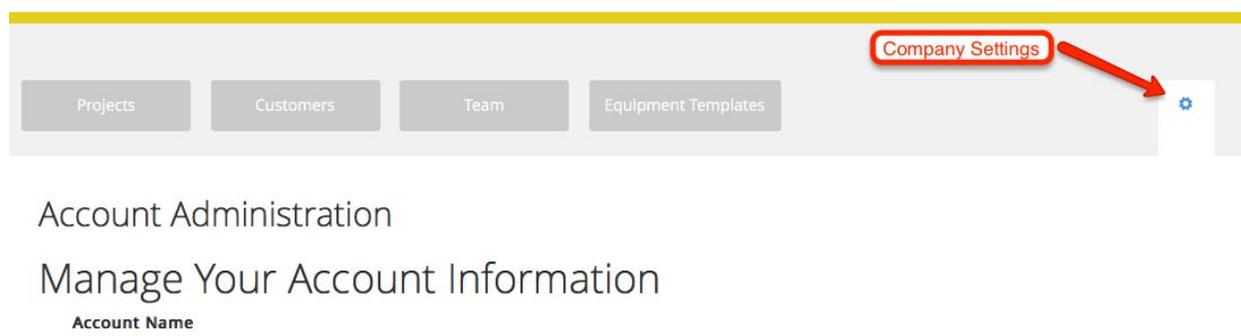
The *Roles* type sets the team member's "Level of Access." **Clipboard** provides for 6 levels of users:

Roles
Project Foreman
Answer Only
View Only
Project Admin
Field Tech
Admin

Each of these *Roles* provides access to the different **Clipboard** tabs, based on a team member's need-to-know.

Admin is the top level user role in **Clipboard**. For this demonstration, the user is assigned this role for the purpose of exploring **Clipboard's** capabilities. With this highest privilege, *Admin* sees all four tabs, i.e., *Projects*, *Customers*, *Team*, and *Equipment Templates* (Forms). *Admin* can create new team members and customers, as well as create and alter existing forms used by the company's **Clipboard** space.

Project Admin - *Project Admin* has most of the tab privileges of the *Admin* but has restricted access to projects. The *Project Admin*, sees only those projects assigned to him/her, whereas, *Admin* sees all of the company's projects. *Project Admin* can create/delete projects and equipment forms, make users active/inactive, and alter or fix other users' notes throughout his/her assigned projects. *Project Admin* does not have access to the *Customers* tab or the company settings area.



[\(Return to Table of Contents\)](#)

Project Foreman - *Project Foreman* has many of the privileges of the *Project Admin*, specifically, the *Projects* and *Team* tabs, but cannot access the *Customers* tab, *Equipment Templates* tab, or the company settings area. *Project Foreman*, however, can alter others' notes and deficiencies, create projects, and add team members to projects.

Field Technician - This user role is for someone who has a few months of experience using **Clipboard** and is ready to begin adding equipment to projects, as well as removing unnecessary forms or equipment from the Project Equipment Trees. This user level does not see the *Customer's* information tab or *Equipment Templates* information tab. The *Field Technician* only has access to his/her associated and linked projects and to the *Team* tab.

Answer Only - This user role is for new members of a team. They are not permitted to change other users' answers or project information of any kind. **Clipboard** limits them to simply answering questions, adding photos, creating deficiencies, and running their own reports for review. Moreover, they can not delete forms from the equipment tree nor alter deficiencies created by other users. Since they are new to the system, we limit the probability of what they could accidentally erase or alter, thus giving the administrator piece of mind that they cannot damage or lose priceless information. This user level does not see the *Customers* tab or the *Equipment Templates* tab. The *Answer Only* role only has access to his/her associated and linked projects and the *Team* tab.

View Only - This user role is for guests. On many projects, inspectors or technicians may need to grant an independent representative, commissioning agent of the owner, or the owner per se, access to projects to track progression. **Clipboard** has the ability to add a guest that can only "*View*" projects. *View Only* users cannot add, alter, or delete any data. For example, guests can look through the equipment tree for ongoing inspections or they can run preliminary reports, as needed. (NOTE - **Clipboard** subscribers are not charged for their *View Only* members.)

Key Points:

Some keys to remember about creating new team members from this chapter:

1. Team members can only be created in the online mode through an Internet Browser. No team members can be created in the offline app.
2. Be mindful of the level of access that is assigned to team members. The role assigned to the specific team member determines the level of access. See the *Roles* chart on the next page to cross reference role type with level of access.

[\(Return to Table of Contents\)](#)

Roles

	View Only	Answer Only	Field Tech	Project Foreman	Project Admin	Admin
Projects Tab	only assigned	only assigned	only assigned	only assigned	only assigned	✓
Team Tab			✓	✓	✓	✓
Customer Tab						✓
Equipment Tab					✓	✓
Company Settings						✓
Project Links	✓	✓	✓	✓	✓	✓
Add Project				✓	✓	✓
Project Overview	project address only	project address only		✓	✓	✓
Project status				✓	✓	✓
Project Notes	✓	✓	✓	✓	✓	✓
Equipment Notes	✓	✓	only change their own notes	✓	✓	✓
Deficiencies	✓	✓	✓	✓	✓	✓
Equipment	✓	✓	✓	✓	✓	✓
Add Component Groups			✓	✓	✓	✓
Remove Equipment from Tree			✓	✓	✓	✓
Add Equipment to tree			✓	✓	✓	✓
Rename Equipment			✓	✓	✓	✓
Answer Questions		✓	✓	✓	✓	✓
Magnifying Glass Access		✓	✓	✓	✓	✓
Report Access	✓		✓	✓	✓	✓
My Info				✓	✓	✓
Change Password	✓	✓	✓	✓	✓	✓

[\(Return to Table of Contents\)](#)

FAQ about New Team Members:

1. Will I be charged for a *View Only* user?

No. Since, *View Only* users do not exchange large amounts of data (loading pictures, deficiencies, etc,) they do not incur a monthly charge. This is a feature that many of our early subscribers requested. As a result, it was built to support their needs and is included in the subscription.

2. Why can't I reactivate a team member that was made inactive?

Once a team member is marked inactive by your company's space administrator, the system will not allow you to reactivate that team member without contacting support. As a security precaution, **Clipboard** prohibits the reactivation of accounts without prior written request from the company in question. Because **Clipboard** doesn't know the circumstances for the team member's inactivation, we take every precaution when reactivating an account. Your data security is one of our biggest concerns and we strive to keep it safe for you.

3. Why can't I create new team members in offline mode?

Offline mode is not a full version of **Clipboard**. It's a utility to the app that was designed mostly to gather data from the field when no Internet or cellular service is available. Because of this, it doesn't allow for "new user" or "new customer" creation when in offline mode. Those types of activities need to occur during the online mode, using a web browser to access the Company Cloud Space.

Chapter 3: Project Creation

Project Form

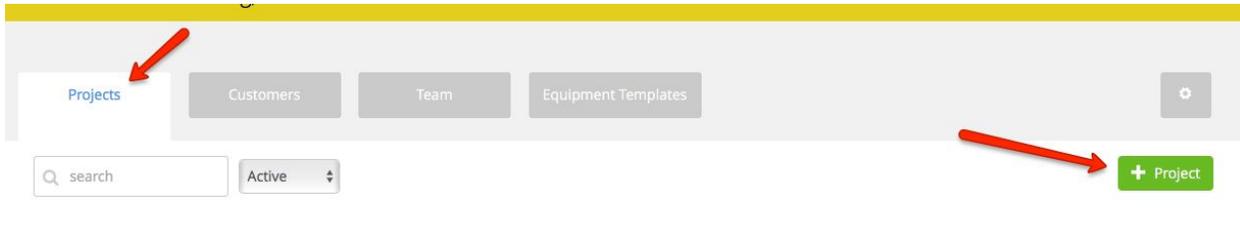
Project management is one of the many great features of **Clipboard**. Using **Clipboard** to manage projects, enables the user to more easily stay in touch with what is happening daily than with paper reporting. **Clipboard** provides real time deficiency tracking and reporting.

With customers and team members created, we can now create a demo project associated with those customers and team members. The demo project provides an environment in which to learn, use the equipment tree, and to print PDF reports that originate from the equipment tree.

Click on the *Projects* tab, if not already there.

[\(Return to Table of Contents\)](#)

Creating a project is similar to creating a customer. Creating a project involves opening a form and filling in the fields with necessary information. First, navigate to the *Projects* tab at the top of the page, and click on the **+ Project** button to the right to add a project.



Fill in the following field boxes with the necessary information:

- Project Title
- Job Number
- Status
- Customer

Project Title and ***Job Number*** accept both letters and numbers.

Status may be set to: *Active*, *Closed*, or *Complete*. However, going back to *Customers* tab, by setting a customer status, from “*Active*” to “*Inactive*,” hides the projects associated with that customer on the *Projects* list. Resetting the inactive customer to an “*Active*” status restores that customer’s projects.

Customer is chosen from a drop-down menu of all of the customers that have been created in the **Clipboard** system. (A customer precedes the project. A customer cannot be created in the *Projects* tab.)

[\(Return to Table of Contents\)](#)

After completing the fields in the form, click the “Create Project” button. This action opens the *Projects* table. The *Projects* table shows multiple quick references. The table is comprised of five columns: **Project #**, **Name**, **Status**, **Complete** (a progress tracker), and **Last Sync** date. This is the essential information which stakeholders require daily, having *Admin* personnel tracking projects as a whole and field technicians planning and preparing their inspections.

Project Organization

Clipboard organizes the project records alphabetically by default. It displays 10 projects per page. As the number of projects increases, **Clipboard** automatically paginates the project records. The user can navigate through the records via a pagination bar at the bottom of the page.



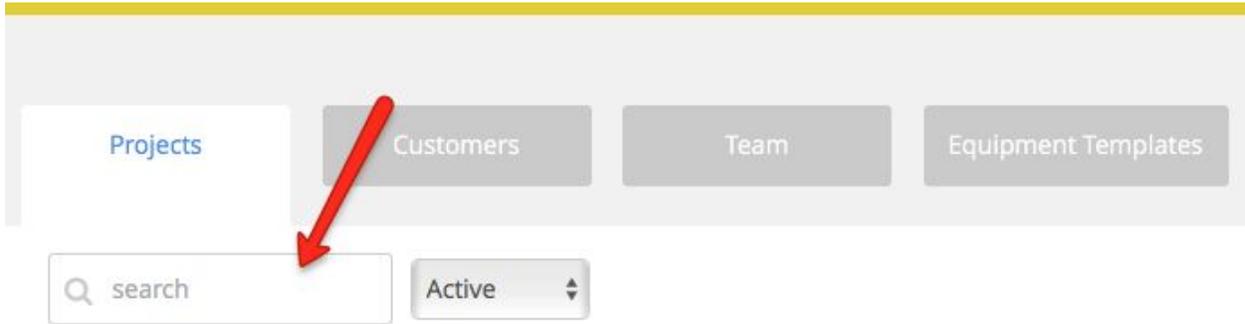
Clipboard does not limit the number of projects that a business can load into the application. Our cloud-based system allows for constant growth. Below is a snapshot of a typical *Projects* tab page with many projects in various stages of completion:

Project #	Name ↓	Status	Complete	Last Sync
17-056	Dulles SOB HVAC Upgrades	Active	42% <div style="width: 42%; background-color: red;"></div>	
12376	Ellenville CSD	Active	0% <div style="width: 0%; background-color: gray;"></div>	
12376-PD	Ellenville CSD Reconstruction (Pre-Demo)	Active	100% <div style="width: 100%; background-color: green;"></div>	1/5/17
11420-A2	Ellis A2 PACU	Active	71% <div style="width: 71%; background-color: green;"></div>	3/6/17
11420-Suite	Ellis A2 PACU Suite Renovations predemo	Active	96% <div style="width: 96%; background-color: green;"></div>	
11420-EP Lab	Ellis Hospital - Existing EP Lab	Active	100% <div style="width: 100%; background-color: green;"></div>	8/20/15
11420	Ellis Hospital- A2 PACU + DG Pathology	Active	100% <div style="width: 100%; background-color: green;"></div>	
11420-OR	Ellis PACU & DG Pathology	Active	100% <div style="width: 100%; background-color: green;"></div>	9/29/16
11945	Empire State Plaza-Rehab. Bus Loop	Active	30% <div style="width: 30%; background-color: red;"></div>	
12249	Endicott Water Treatment Plant	Active	0% <div style="width: 0%; background-color: gray;"></div>	

Active ▾
+ Project

First Previous 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 ... Next Last

Over time, as the number of projects accumulate, users can perform searches to quickly hone in on the desired project.



As users input characters (numbers and letters) of the project name, **Clipboard** narrows the search down to the possible projects, thus saving time. Moreover, project names can

[\(Return to Table of Contents\)](#)

be sorted alphabetically, from A-Z or Z-A, by clicking on the arrow next to the *"Name"* column.



[\(Return to Table of Contents\)](#)

The same can be said for the "Project #" column. Projects can be sorted from either the lowest number or the highest number.

Project # ↓	Project # ↑
	Tioga Downs
	HW
111	TAB
723	Submittals
10880	Smith and
10952	wesson

Project *Status* can be set and changed to three different states: *Active*, *Completed* or *Closed*. *Active* is the default status displayed in the *Projects* tab page. The projects that the Admin changed, from *Active* to *Completed* or *Closed*, get stored in other directories. Over time as the number of projects grow, it becomes easier to sort the data using the *Active*, *Completed* or *Closed* filters to more quickly find the project.

Clipboard is capable of going above and beyond its standard, out-of-the-box version that users typically use, as the application can address each customer's specific needs. For example, the states of *Completed* and *Closed* may be defined differently among TAB companies. Our support specialists will accommodate customization, if a customer requires additional or different project states that suit that company's business rules.

[\(Return to Table of Contents\)](#)

The **Complete** column tracks the percentage of *Required* questions in the forms that have been answered. (The user may set a question to *Required* when he/she creates it in the *Equipment Templates* tab for projects.) As field technicians and inspectors finish their work (and sync-up if working in offline mode), the percent-complete tracker auto populates the *Complete* column in the *Projects* table giving the *Admin* and the *Field Tech* a quick look at the measure of accomplishment. This feature ensures that technicians understand that they have finished 100% of the work expected of them in that project, and consequently, preventing a return trip that costs the company money and possibly missed deadlines for the construction team. **Clipboard**, in part, helps prevent lost time for returned trips and user error. (To find out more about how to create Auto-Calculations built into forms, see [Chapter 4](#) on Form Creation.)

The column to the far right on the *Projects* tab is the date of the “*Last Sync*.” Administrators can see the most recent date that the last offline mode sync-up occurred. Many times users will be interfacing with **Clipboard** through the online portal, so answers are tracked and timestamped as they are entered. The same thing happens when technicians and inspectors work offline. When the field tech eventually syncs the answers that were entered offline, the **Clipboard** system will track the *Last Sync* date to show the last time when it was used offline.

Chapter 4: Form Creation (Equipment/Inspection Templates)

Creating Equipment Templates

The most powerful feature of **Clipboard** is the ability to quickly and easily create equipment templates or forms. These forms allow the *Admin* to create custom reports for most needs, on the fly if necessary. To make the transition from traditional form and reporting modes to **Clipboard**, the user should start with the end product in mind. Since an easily readable form and report is what the user ultimately wants to see and evaluate, it is best to start with an example of an existing document and work backwards to create the equipment template.

Consider these points when making your forms:

- Do you have current forms? Are they MS Word, Excel or other?
- Do you have fields that may not apply to each job or all situations?
- Are you manually calculating answers that could be auto-calculated for you?

[\(Return to Table of Contents\)](#)

If any of these cases come into play, then **Clipboard** can be programmed to help automate these processes in your business, using our customizable forms.

A key point to pay attention to when creating equipment templates are *Question Types*.

Clipboard currently has four question data *Types*:

- Text
- Number
- Number (Design vs Actual)
- Calculated

When constructing a template, the user selects the data type that relates to the question. In the template below, an example of a boiler test, most of the data types are text, except those that serve as mathematical factors, products, or quotients. Clicking on the *Type* drop-down box reveals the data types (highlighted in yellow).

Question Text	Type	Precision	Def. Units	Req.
Unit Manufacture	Text			<input checked="" type="checkbox"/>
Unit Designation	Text			<input type="checkbox"/>
Unit Model No.	Text			<input type="checkbox"/>
Unit Serial No.	Text			<input type="checkbox"/>
BTU Input	Number (Design & Actual)	0	btu	<input checked="" type="checkbox"/>
BTU Output	Number (Design & Actual)			<input checked="" type="checkbox"/>
Fuel Type	Text			<input type="checkbox"/>
Gas PSI	Text			<input type="checkbox"/>
Hi Limit Set Pt	Text			<input type="checkbox"/>
Ventilation Provid	Text			<input type="checkbox"/>
Unit Run Time Ho	Text			<input type="checkbox"/>
New question	Text			<input type="checkbox"/>

Text - Allows any type of character in the answer up to 512 characters (about 5 lines of text). However, although text answers are limited to 512 characters, the user can alternatively add a "Note" to any answer. *Notes* space is unlimited.

Number - Restricts answers to numbers only (positive and negative numbers with virtually unlimited decimals places). These numbers can be used in conjunction with *Calculated* fields.

[\(Return to Table of Contents\)](#)

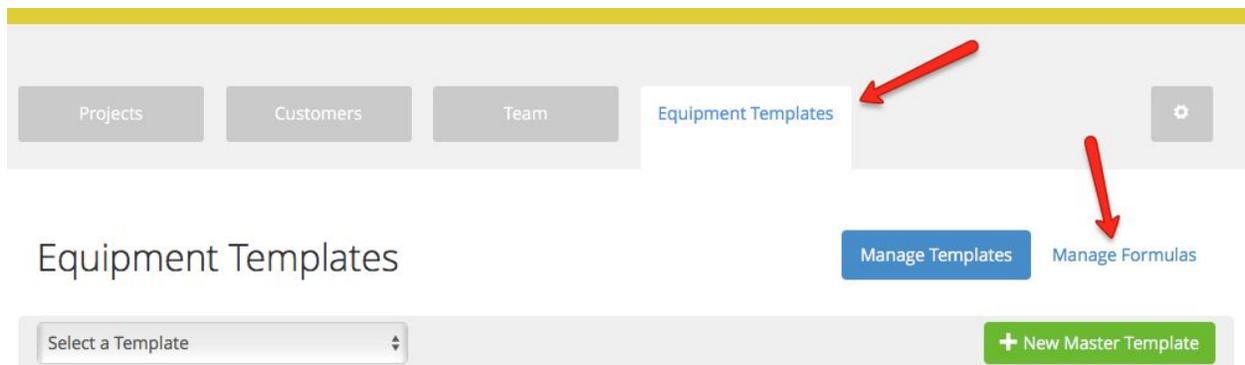
Number: Design vs. Actual - This answer type compares the specified *Design* value to *Actual* value recorded. The percent of design is calculated by dividing the *Actual* value by the *Design* value. The percent of design is always displayed to the right of the *Actual* number. By allowing forms to be automated, when users populate number fields while working on the job site, auto-calculations can be programmed to take over what has traditionally been done manually, thus eliminating hand-made errors and saving time.

Calculated Fields - Most calculations that can be programmed into an Excel spreadsheet can be programmed into **Clipboard** as a standard function of any *Equipment Template*, e.g., brake horsepower, kilowatts per hour used, R-factors for windows and doors, etc. The list is almost endless! Calculated fields can only utilize number type fields.

Managing Formulas

It's important to note that for a form that contains *calculated fields*, the formula (calculation) must be created before it can be inserted into the equipment template. While not required, it is easiest to assign the same field labels in a form question that are used in the formula.

From the **Clipboard** dashboard, first click on the *Equipment Templates* tab to open the page. Then click on *Manage Formulas* button. (The page defaults to the *Manage Templates* page.)



Next, click on the **+ Create a New Formula** button on the *Formulas* menu to open the form/editor that enables the creation of a formula.

[\(Return to Table of Contents\)](#)

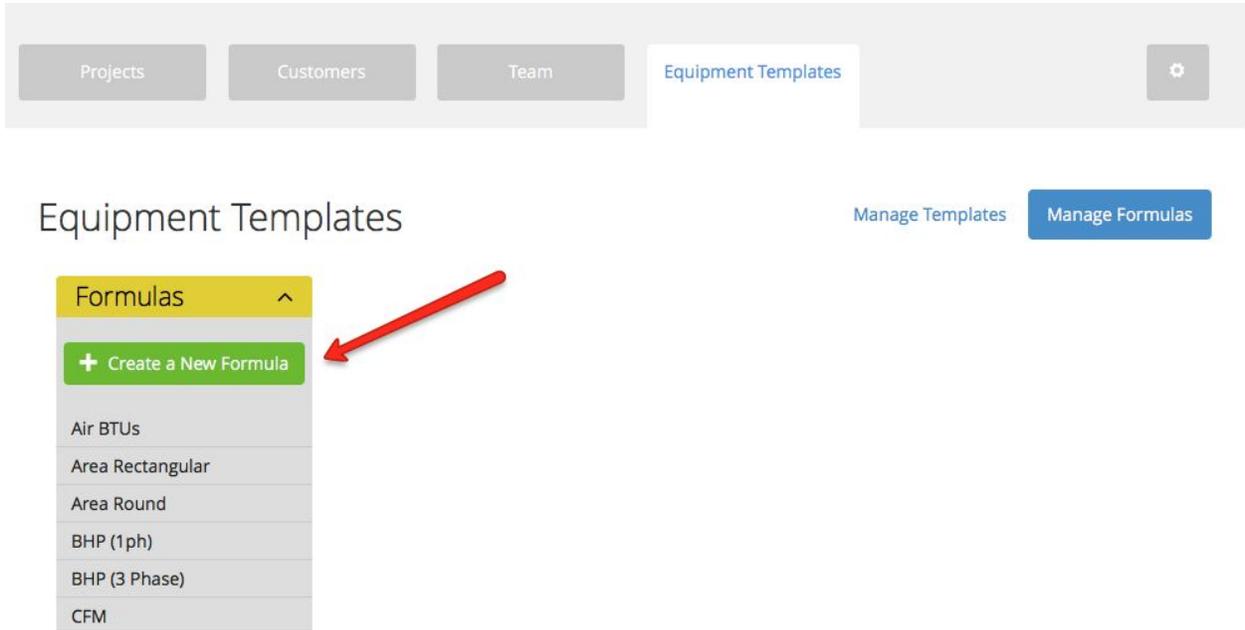
Projects Customers Team Equipment Templates

Equipment Templates

Manage Templates Manage Formulas

Formulas ^

- + Create a New Formula
- Air BTUs
- Area Rectangular
- Area Round
- BHP (1 ph)
- BHP (3 Phase)
- CFM



The *Formula Description* field serves as the label for the formula, e.g., "Volume."

[\(Return to Table of Contents\)](#)

Projects Customers Team Equipment Templates

Equipment Templates

Manage Templates Manage Formulas

Formulas

Formula Description

Formula

Operators: +, -, ×, ÷, (,)

Functions: √, x^y

Constants: π, e

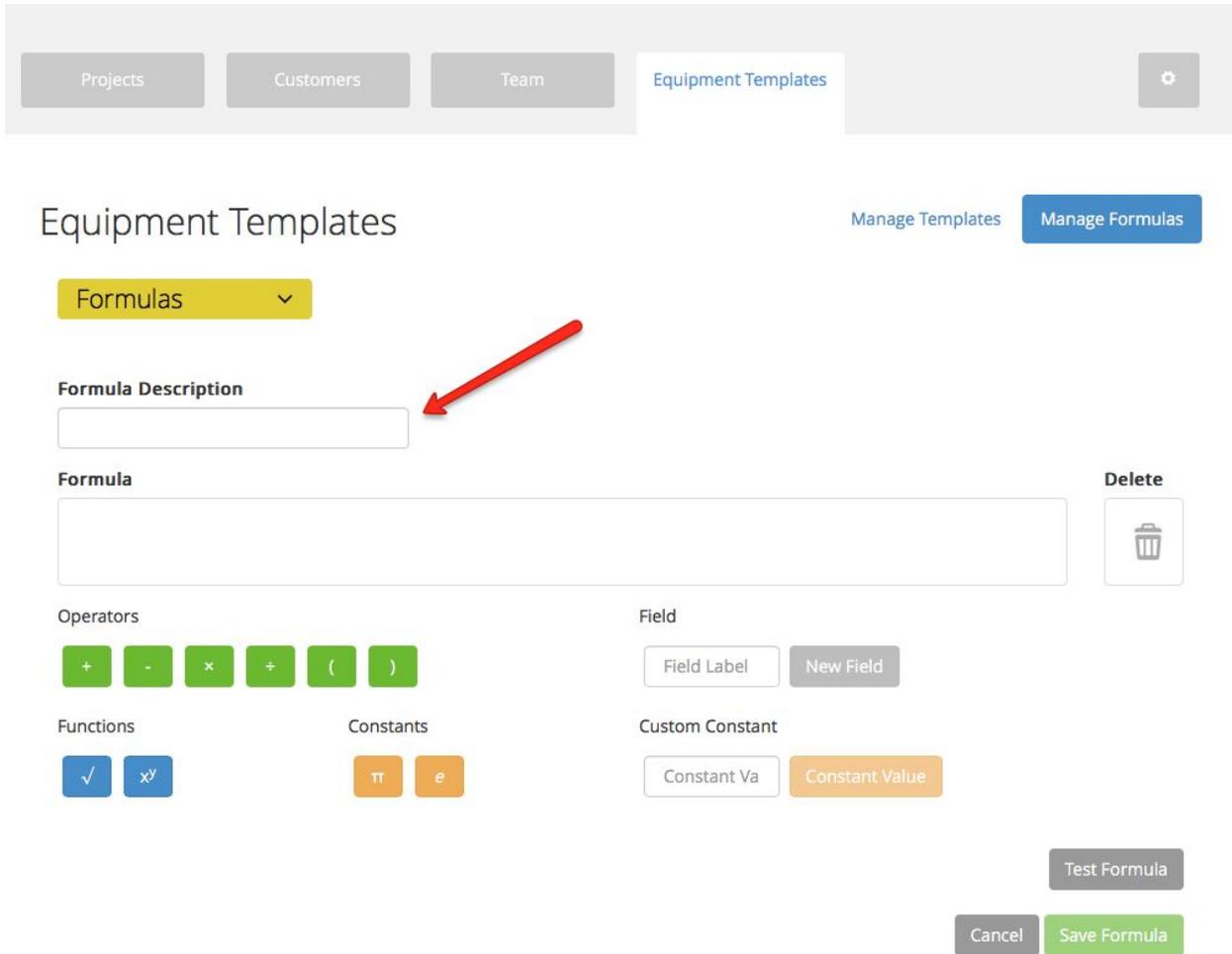
Field: Field Label, New Field

Custom Constant: Constant Va, Constant Value

Delete

Test Formula

Cancel Save Formula



Underneath the *Formula Description* field, the large empty box labeled, *Formula* serves as the area to construct the formula. The user simply drags and drops the appropriate mathematical object from the list of *Operators*, *Functions*, *Custom Constants*, and *constants* into the box to create a new formula. The *Field Label* gives a name to the *Field* used in the equation, e.g., height, width, depth, etc.

[\(Return to Table of Contents\)](#)

Formulas

Formula Description

Volume

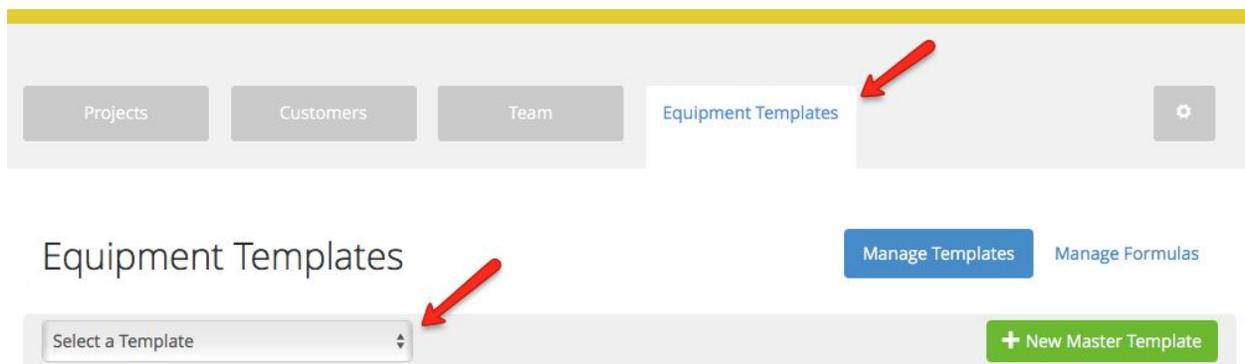
Formula

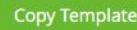
Length  Width  Height

Managing Templates

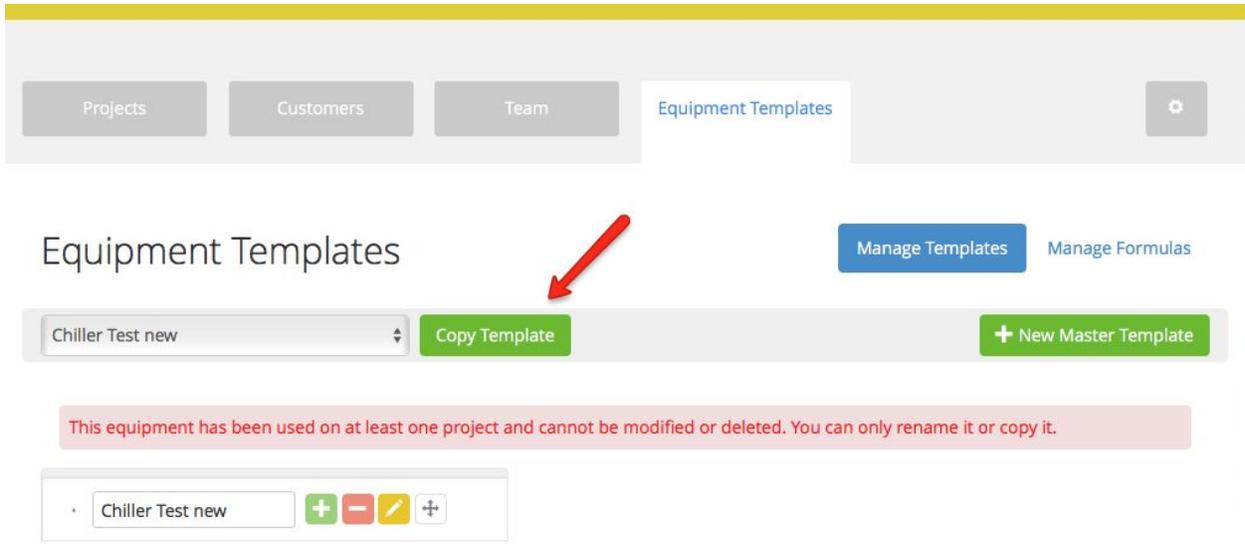
Clipboard is provided to the TAB subscriber without templates. The subscriber creates the necessary templates or forms as needed. During the initial training period, our customer service representatives will guide the user through **Clipboard** to construct the necessary formulas and templates that the business needs and uses. Once essential forms are created, they remain available in **Clipboard** for reuse. The user accesses them from the *Select a Template* drop-down box.

From the dashboard, click on the *Equipments Templates* tab.



Contained within the *Equipment Templates* tab, existing templates (those already created by the user) are located in the *Select a Template* dropbox listed in alphabetical order. To quickly create a customized template from an existing one, simply select the template to replicate from the dropbox. Then click the green  button to the right of the drop-down box field.

[\(Return to Table of Contents\)](#)



An existing template cannot be reused with its current assigned name. Attempting to reuse the template triggers an alert stating such and directs the user to rename or copy the original template. Clicking on **Copy Template** button quickly dispatches the task of renaming the template. This will automatically rename the template as, "*Copy of (Existing Template Name)*." Click the yellow pencil  button to the right of the box to edit the fields, as necessary.

Equipment Templates

Manage Templates

Manage Formulas

Copy of Chiller Test new Copy Template + New Master Template

Copy of Chiller Test new + - ✎ +

click pencil to edit fields

Report Layout: Detail

Unit Data No page break

Category

Question Text	Type	Precision	Def. Units	Req.	
Manufacturer	Text			<input type="checkbox"/>	-
Model No.	Text			<input type="checkbox"/>	-
Serial No.	Text			<input type="checkbox"/>	-
Cooling Type	Text			<input type="checkbox"/>	-
Rated Capacity 1	Text			<input checked="" type="checkbox"/>	-
Refrigerant Type	Text			<input checked="" type="checkbox"/>	-
					+

Evaporator Data No page break

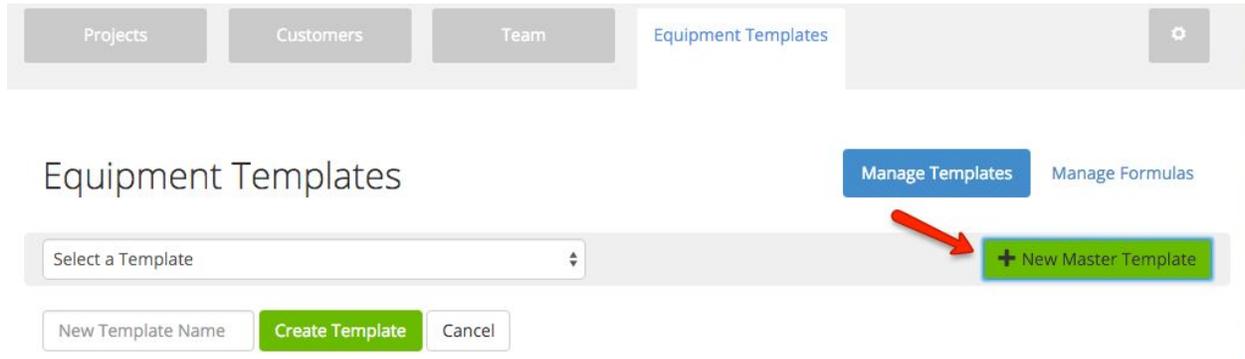
Category

Question Text	Type	Precision	Def. Units	Req.	
Evap Entering W	Number (Design)	1		<input checked="" type="checkbox"/>	-

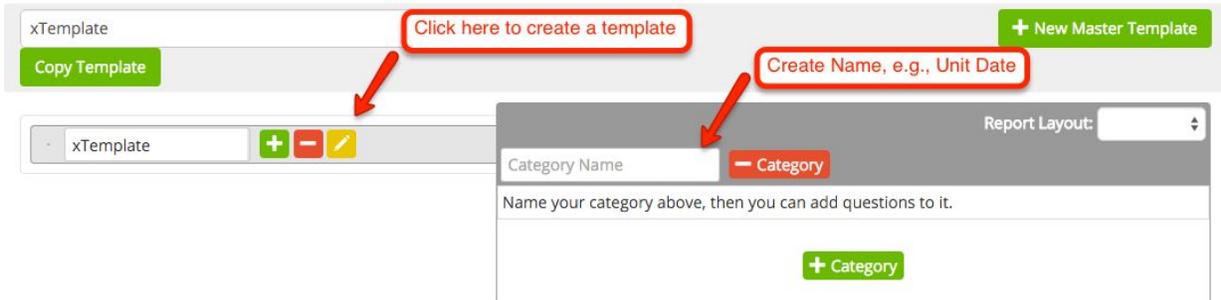
[\(Return to Table of Contents\)](#)

Create a New Template

With knowing how to create and select formulas to use in calculated fields, a user can create a new template for a mechanical component, a TAB case, or any matter that needs reporting. To create a new template, click on the *New Master Template* button.



Enter a *New Template Name*, e.g., "xTemplate," then click the green *Create Template* button. Click the edit button,  , then click on  .



Type a *Category Name*, e.g., "Unit Data," then [Enter]. **Clipboard** creates a question row. Each row has 5 columns that define the test question: *Question Text*, *Type*, *Precision*, *Def. Units*, and *Req.* (Required). For calculated questions, choose a formula from the drop-down menu. If a formula does not exist for the category template, a formula will have to be created and added to the selection.

[\(Return to Table of Contents\)](#)

Report Layout:

Unit Data - Category

	Question Text	Type	Precision	Def. Units	Req.	
✓	<input type="text"/>	Text <input type="text"/>		<input type="text"/>	<input checked="" type="checkbox"/>	-
						+
+ Category						

Assign a *Question Text*, e.g., "Equipment Location," "Area Served," "Unit Manufacturer," "Unit Serial Number," etc.

For those questions that do not require a numeric answer, select "Text" for the *Type*. Alternatively, if the *Question Text* requires a numeric answer for the question, e.g., "Filter Quantity," "Motor RPM," "Motor Horsepower," "Plate volts," etc., then choose "Number" *Type*.

The *Precision* column relates to "Number" *Type* answers; it wants the user to specify the number of decimal places for the numerical answer, e.g., 4, 4.0, 4.00, 4.000, etc.

The *Def. Units* column defines the data types: Amps, bar, btu, CFM, deg C, deg F, FPM, ft, Hz, in., in. H2O, PSI, etc.

The *Req.* (Required) column is a checkbox, asserting that the answer for this question is certainly needed information for the test, not optional.

To add another question, click +. To add another Category, click + Category. Click - to delete the question. Assign a Category Name and hit the Tab key on the keyboard to save it.

[\(Return to Table of Contents\)](#)

Chapter 5: Creating Equipment Trees In Projects

[Chapter 4](#) shows the formulas and equipment templates, i.e., the building blocks of an inspection. With a library of forms/templates in the company space, **Clipboard** allows the *Admin* to build and organize these templates into an *Equipment/Inspection Tree* inside projects. The *Equipment Tree* serves as a road map for the technicians and inspectors to follow in order to complete their work. **Clipboard** allows the Admin user to combine templates to make any kind of tree, small or large. For example, the user can tailor-make forms to be small and compartmentalized for quickly adding additional templates or, the user can develop long, all encompassing forms that cover every aspect of the intended inspection.

When constructing an *Equipment/Inspection Tree*, consider whether the project is broken up into phases or different areas of inspections. For example, some considerations may include: whether to start on the roof or maybe in the basement; some reports may need to be submitted during the course of the project; also consider the need for a specific order for equipment.

An *Equipment/Inspection Tree* is a hierarchical structure, with components arranged in a parent - child relationship. For example, consider an inspection. The building comprises a roof, basement, and first floor as top-level, parent class components. These three parent classes, in turn, comprise child components that depend on them. If we determine the roof as a parent class, then child components include: shingle, gutter and chimney inspections. The basement as a parent comprises a furnace, with mechanical systems inspections done in the basement. With the first floor as parent, then all electrical and plumbing inspections done on the first floor are subordinate.

With respect to *Equipment/Inspection Tree*, since parent components are always top level component groups, the *Admin* user places parent items on the first tier of the project equipment tree. The child components beneath the first tier can be arranged in at least two different ways, or a combination of both. One way is to lay out child items all together, "side-by-side" on tier two of the equipment tree. Alternatively, child items can be nested, i.e., built on different tiers beneath other child components. This alternative way may provide better visual organization for field technicians or inspectors as they look at the project equipment tree. In either case, the final report rolls the child items together underneath their respective parent group, thus ensuring that all the child information stays together for a given parent in the report.

[\(Return to Table of Contents\)](#)

Clipboard allows the *Admin* user to organize testing or inspection templates by order of equipment. The illustration below shows the major components in the equipment tree. Beneath this “tier 1,” child items appear in equipment tree, starting on “tier 2.” If the inspection scheme drills down further into more specific components, the tree continues into “tier 3” and, if relevant, “tier 4.”

Project Equipment

The screenshot shows the 'Project Equipment' interface. At the top, there is a search bar labeled 'Select a Component' and a blue button labeled '+ Component Group'. Below this, there are two buttons: 'Enable Deletion' and 'Reorder'. The main area contains a list of equipment components, each with a right-pointing chevron icon:

- > AME (1PH)
- > Supply Fans (3PH)
- > Exhaust Fan (1PH)
- > Exhaust Fan (3PH)
- > Existing Loss Preventio
- > Instruments Used

A red rectangular box highlights the first five items in the list. A red arrow points from a red rounded rectangle labeled 'Tier 1' to the 'Exhaust Fan (3PH)' item, indicating it is the current tier level.

[\(Return to Table of Contents\)](#)

The illustration below focuses on the AME component, drilling down into its two, subordinate air handling units (AHU).

Project Equipment

Select a Component + Component Group

Enable Deletion + Reorder

AME (1PH) ← Tier 1 Parent

Summary

AHU F-1 ← Tier 2 Child

AHU F-2 ← Tier 2 Child

+ AME (1PH) NEW ← Add another Tier 1 Parent

> Supply Fans (3PH)

> Exhaust Fan (1PH)

> Exhaust Fan (3PH)

> Existing Loss Preventio

> Instruments Used

The screenshot shows a hierarchical list of equipment components. At the top is a dropdown menu 'Select a Component' and a blue button '+ Component Group'. Below are two buttons: 'Enable Deletion' and '+ Reorder'. The main list starts with 'AME (1PH)', which is expanded to show two sub-items: 'AHU F-1' and 'AHU F-2'. Each sub-item has a yellow edit icon. Below these is a green button '+ AME (1PH) NEW'. Further down are 'Supply Fans (3PH)', 'Exhaust Fan (1PH)', 'Exhaust Fan (3PH)', 'Existing Loss Preventio', and 'Instruments Used'. Red callouts with arrows point to 'AME (1PH)' (labeled 'Tier 1 Parent'), 'AHU F-1' and 'AHU F-2' (labeled 'Tier 2 Child'), and '+ AME (1PH) NEW' (labeled 'Add another Tier 1 Parent').

[\(Return to Table of Contents\)](#)

In the illustration below, the AHUs with their information, in turn, can be organized to stand over their subordinate forms, specifically, traverse forms, terminal units and then outlets or inlets that are associated with that AHU.

Project Equipment

The screenshot displays the 'Project Equipment' interface. At the top, there is a 'Select a Component' dropdown and a '+ Component Group' button. Below this, there are 'Enable Deletion' and 'Reorder' buttons. The main content area shows a hierarchical tree structure:

- AME (1PH) (Tier 1 Parent)
 - AHU F-1 (Tier 2 Child)
 - Main Traverse
 - Outside Air
 - SO-001
 - SO-002 (Tier 3 Grandchild)
 - SO-003
 - SO-004
 - SO-005
 - RI-001

At the bottom of the interface, there is a '+ Component' button, which is annotated with the text 'Add another Tier 3 component'.

[\(Return to Table of Contents\)](#)

When adding a component group, the user can assign a name to the component group prior to adding the forms to the tree. This is the first level of organization for reports. Assigned names can be anything, e.g., Area/Phase, Turn Over Dates, Floor number, etc.

Other features available for building an equipment tree is the *Reorder Button* and the *Enable Deletion* button. These two buttons permit alterations, e.g., editing and sorting of the equipment tree. For example, borrowing an equipment tree from another project may require deleting an inspection form that is inapplicable or unnecessary to the intended inspection form. The *Reorder Button* allows the user to rearrange component groups. These buttons need to be activated in order to perform either action.

Project Equipment



There is a direct correlation between the hierarchical equipment tree and the layout of the PDF report. The hierarchical equipment tree determines how reports will be presented. **Clipboard** assembles and prints industry standard PDF reports in seconds with full color pictures and unlimited notes and deficiency tracking. Reports can be generated within hours of work completion.

Because parent groups can have many levels of child items beneath them, the report's header will always show the top level parent, even as it descends through pages of child items. This allows the user to always reference which children equipment belong to which parent equipment or inspect areas. Moreover, reports automatically pagebreak parent component groups when the report generates PDFs.

Below are snippets of 2 pages taken from the PDF report generated from the equipment tree above.

[\(Return to Table of Contents\)](#)

EXAMPLE OF REPORT PREDICATED FROM THE EQUIPMENT TREE

AME (1PH) ← **Tier 1 Parent**

AHU F-1 ← **Tier 2 Child**

UNIT DATA

Equip. Location	Ceiling	Filter Type	Media
Area Served	Offices	Filter Quantity	1
Unit Manufacturer	Trane	Filter Size	24x16 in
Unit Model No.	XR95	Performed By	DC
Unit Serial No.	16193WHX5G	Pass/Fail	See Note

TEST DATA

	Design	Actual	%		Design	Actual	%
Total Unit CFM	1200 CFM	ISDFT CFM		Fan RPM	Not Specified RPM	Direct Drive RPM	

AHU F-1 / Supply Outlet Summary ← **Tier 3 form**
 ← **Tier 2 component**

SUPPLY OUTLET SUMMARY

Name	Room No.	Type	Size	AK Factor	Design FPM	Design CFM	Reading 1	Reading 2	Final CFM	% of Design
SO-001	031	A	24x24	1.000	265	265	210	190	190	72
SO-002	031	A	24x24	1.000	265	265	213	193	193	73
SO-003	031	A	24x24	1.000	265	265	189	194	194	73
SO-004	032	A	24x24	1.000	200	200	133	136	136	68
SO-005	032	A	24x24	1.000	200	200	129	131	131	66
Totals						1195			844	

AHU F-1 / Return Inlet Summary

RETURN INLET SUMMARY

Name	Room No.	Type	Size	AK Factor	Design FPM	Design CFM	Reading 1	Reading 2	Final CFM	% of Design
RI-001	031	B	24x24	1.100	982	1080	640	640	704	
Totals						1080			704	

Following the order in the *Equipment Tree*, in a report, child components are listed under their respective parent component group in the “automated table of contents.” See below:

[\(Return to Table of Contents\)](#)

Table of Contents

AME (1PH)	4
AHU F-1	4
AHU F-2	7
Supply Fans (3PH)	10
SF-1A (MTI #1)	10
SF-1B (MTI #2)	12
SF-1C (MTI #3)	14
SF-1D (MTI # 4)	16
SF-1E (MTI # 5)	18
SF-1F (MTI # 6)	20
SF-1G (MTI # 7)	22
SF-1H (MTI # 8)	24
SF-1I (MTI #9)	26

Appendix

Links and Browser information - www.app.clipboardtool.com

[\(Return to Table of Contents\)](#)

A.TroubleShooting Browser Issues

1. Internet Explorer

Delete Browser History and Clear Cache and Cookies

1. In the upper right corner of the browser page, select **Tools** ( Icon) > **Safety** > **Delete Browsing History**.
2. Make sure to uncheck **Preserve Favorites website data** and check both **Temporary Internet Files, Cookies,** and **History** then click **Delete** button.
3. <https://support.microsoft.com/en-us/help/17438/windows-internet-explorer-view-delete-browsing-history>

Update Browser

1. To open Internet Explorer, select the **Start** Windows logo Start button button, type **Internet Explorer**, and then select the top search result.
2. To be sure of the latest version of Internet Explorer 11, select the **Start** Windows logo Start button button, select **Settings** Gear-shaped Settings icon > **Update & security** > **Windows Update**, and then select **Check for updates**.

[\(Return to Table of Contents\)](#)

2. Safari

Delete Browser History

1. Choose **History** > **Clear History** > click the pop-up menu, then choose how far back to clear browsing history cleared.
2. https://support.apple.com/kb/PH21412?locale=en_US

Clear Cache and Cookies

1. Click **Safari** in the upper left hand side of the screen. In the menu that appears, click **Preferences**.
2. In the window that appears, click the **Privacy** tab.
3. Click the button
4. Click the button **Remove All**
5. https://support.apple.com/kb/ph21411?locale=en_US

Update Browser

1. Apple regularly updates Safari without the user's action.

3. Chrome

Delete Browser History

1. On the computer, open Chrome.
2. At the top right, click More  button.
3. Click **History > History**.
4. On the left, click **Clear browsing data**. A box will appear.
5. From the drop-down menu, select how much history to delete. To clear everything, select **the beginning of time**.
6. Check the boxes for the info to clear, including "browsing history."
7. [Learn more about the types of browsing data you can delete](#)
8. Click **Clear browsing data**.

Clear Cache and Cookies

1. Open Chrome.
2. On the browser toolbar, click More .
3. Point to **More tools**, and then click **Clear browsing data**.
4. In the "Clear browsing data" box, click the checkboxes for **Cookies and other site and plug-in data** and **Cached** images and files.
5. Use the menu at the top to select the amount of data to delete. Choose **beginning of time** to delete everything.
6. Click **Clear browsing data**.
7. <https://support.google.com/accounts/answer/32050?hl=en>

Update Browser

1. Click the **Chrome** link on the Menu bar.
2. From the drop-down menu, select **About Google Chrome**.
3. Chrome will search for updates.

4. Mozilla Firefox

To clear the history (i.e. cookies, browsing history, cache, etc.) all at once, see [Delete browsing, search and download history on Firefox](#).

Delete Browser History

1. Click the menu button , choose **History**, and then **Clear Recent History...**
Select how much history to clear.
2. Click the drop-down menu next to **Time range to clear** to choose how much of the history Firefox will clear.
3. Next, click the arrow next to Details to select exactly what information will get cleared. Several choices are described in the [What things are included in my history?](#)
4. Finally, click the Clear Now button. The window will close and the items selected will be cleared.

Clear Cache and Cookies

1. Click the menu button  and choose **Preferences**.
2. Select the **Advanced** panel.
3. Click on the **Network** tab.
4. In the **Cached Web Content** section, click Clear Now.
5. Close the about:preferences page. Any changes made will automatically be saved.

Update Browser

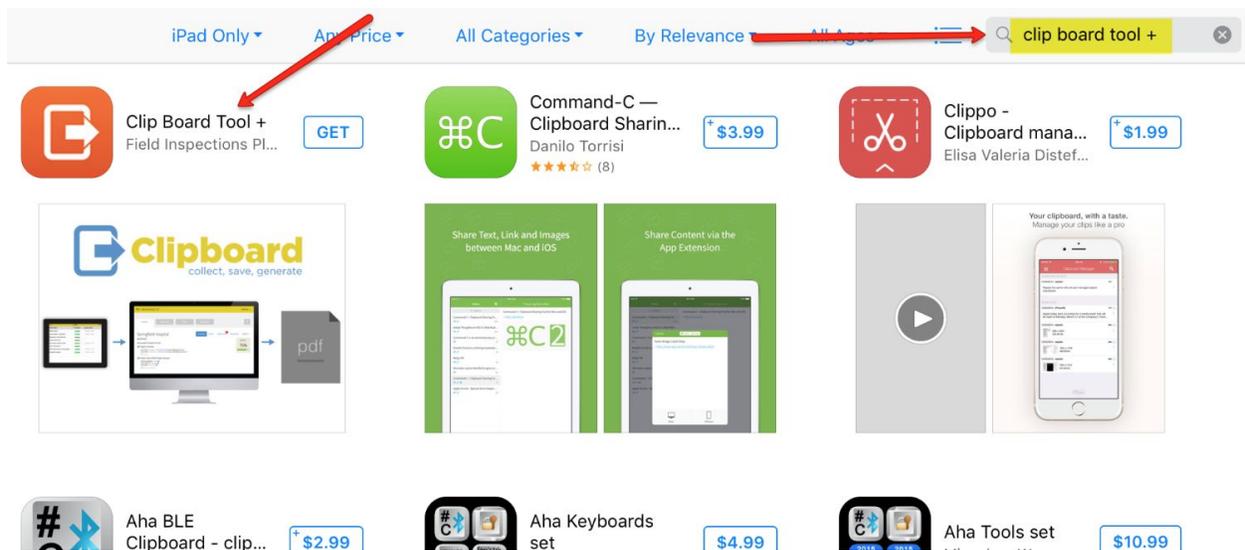
By default, Firefox is set to automatically update itself but users can always do a manual update. Here's how:

1. On the menu bar click the **Firefox** menu and select **About Firefox**.
2. The **About Firefox** window will open and Firefox will begin checking for updates and downloading them automatically.
3. When the updates are ready to be installed, click **Restart Firefox to Update**.

B. Downloading Clipboard

Users can download **Clipboard** from Apple's *App Store* and Google's *Google Play*. Be aware, there are many software application products with some form of the name "clipboard." In the Stores, our product is called "**Clip Board Tool +**".

Go to the *App Store*. In the search box, type the name -- note the spaces between the words. **Field Inspections Plus LLC** produces **Clip Board Tool+**.



[\(Return to Table of Contents\)](#)

Click on the image:

Clip Board Tool + 4+
Field Inspections Plus LLC >

GET

Details Reviews Related

iPad

Clipboard
collect, save, generate

Project Name	% Complete	Last Sync Date
Alltek CoGen 2	<div style="width: 100%;"></div>	2014-03-26 - 10:18:53
America Bank - Loudonville	<div style="width: 100%;"></div>	2014-03-26 - 10:18:29
Binghamton Central Schools	<div style="width: 100%;"></div>	
General AirFlow Co	<div style="width: 100%;"></div>	
Gloversville Johnstown WTP	<div style="width: 100%;"></div>	2014-03-26 - 10:17:42
Jenco International	<div style="width: 100%;"></div>	
NYP&Gibboa Phase 1 Security Bldg	<div style="width: 100%;"></div>	2014-03-26 - 10:19:18
Springfield Hospital	<div style="width: 100%;"></div>	2014-03-26 - 10:19:42

Description

Clipboard is a paperless documentation system that allows TAB professionals to create, manage and share Certified Test and Balance Reports across different platforms and devices. Collect, Save and Generate!

[\(Return to Table of Contents\)](#)

C. Technical Information

Tech Stack

- Linux ip-10-0-1-151
- Apache/2.2.31
- MySQL and Sqlite Databases
- Java / Coldfusion 11 middle tiers
- AngularJS 1.2
- HTML5 Front End
- XML/XSLT FOP for PDF generated reports
- Titanium Mobile, iOS/Android Tablets
- Jenkins CI
- Git is used for version control
- Full REST API
- HTTP[S] calls - HTTPS is enforced at the Web server layer.
- Web Browsers
 - IE 9+
 - Firefox
 - Chrome
 - Safari
 - iPad 2&3
 - Opera

Other Features

- Customizable logo/branding
- Supported Clients
- Offline support for answering questions, adding deficiencies and photos
- Security
- All aspects of the Clipboard system design, implementation and deployment have been planned with system security in mind.
- Password secured with one-way encryption algorithm
- Passwords can not be read back - only reset using the available web form
- No password is directly set; user sets their own password through a reset link emailed to the address on record
- Fine-grain authorization supported through roles
- Role based authorization with specific overrides as needed for unlimited combinations

- Strict access control to physical servers.
 - SSH is required
 - IP filtering as needed
- Hosting

[\(Return to Table of Contents\)](#)

- Reliable and fast servers, at a predictable monthly cost, with proactive maintenance and monitoring of your managed hosting solutions 24/7
- 13 redundant multi-homed Internet carriers - always routed for best performance
- Defended by 5-Tiered Security, data center border routers and firewalls.
 - These redundant devices filter known threats, automated attacks, malicious traffic, bogon IPs, bad ports and untrusted networks.
- Dedicated high-performance Cisco ASA firewalls are used to achieve complete isolation between environments.
- Active and Passive defense of Cross Site Scripting, SQL Injection, Path Traversal and 400+ other

D. Collateral Documents

Prospective Customer Questionnaire

Welcome to Clipboard!

This document is to help gather some important information about your company's documentation process so that we can help make the upcoming demonstration the best experience possible. Please answer the below questions to the best of your knowledge.

- A. Company Name, Address and contact info for Point of Contact Representative?
- B. Does your company currently use a paperless system?
- C. Do your field tech's have hotspots or have cell phones with hotspots?
- D. Do your Tech's use tablets and/or laptops currently?
- E. How familiar are you with Google Chrome, Mozilla and other Internet browsers?
- F. How many possible tech's do you envision using the tool vs office staff?
- G. What brand of mobile devices will your company deploy in the field?
- H. What trade does your company engage in?
- I. Do you envision looking at customization options for your space? This would give your Clipboard space it's own unique look and feel. Ask your Customer Support Representative for details.

Thank you for your time in answering these questions. If you can not answer one, no worries. We will go over everything and answer any questions you may have during the demo phase.

Thanks again for your interest in Clipboard.

Brian Venn
President - TBE - CxA
Field Inspections Plus - Makers of Clipboard

[\(Return to Table of Contents\)](#)

Training Agenda



Hello,

Today is your first day of training and we look forward to supporting you through the transition to using **Clipboard** for your reporting software!

First off, here are a few important links that will help you get started:

1. <http://app.clipboardtool.com/> - Is the url that you will use to access your "Space" online.
2. Support@fieldip.com – Is the email you can use to contact a support representative any time of day.

Getting started is as easy as logging in. Please proceed to the url above and use the username and password that were sent to you when you signed up for **Clipboard**. If you did not receive this email, please let the trainer know and we will get you send you a copy right away.

A. New Customer

- Name
- Phone

B. Customer > More Details click on Customer Name

- Name
- Address
- Phone
- Email
- Fax – optional
- Status (Active vs Inactive)
- Notes/Conversations
- Contact/Customer Management

[\(Return to Table of Contents\)](#)

C. Project Creation

- + New Master Template
- Tree Structure
- Setup your Equipment
 - i. Adding Parent and Child Components
- Parent/Child relationship

D. Team Creation

- List of your Users / Phone List
- Team Details
 - i. Email
 - ii. Phone (Home, Mobile, Business)
 - iii. Current Project List
 - 1. Used for Offline Sync mode in iPad Application
- Sync History
- Roles (Field Tech/Admin)
- Status (Active/Inactive/Fired/On hold)
- Change Password

E. Overview

- Notes
- Deficiency list
- Milestones
- Template Creation
- Unique Equipment
- Cloning
- Managed Fields
- Designated Units
- Calculated Fields
- Customized Templates in Minutes!

F. Closing

G. Questions

H. Schedule next training

Training Day 2

- 1. Recap Customer and Team Creation**
- 2. Equipment Templates**
 - Detail Forms
 - Summary Forms
 - Categories
 - Category Names
 - Questions
 - Answer types
 - Setting Units English/Metric
 - Required vs Non-Required Answers
- 3. Template Creation based on samples provided by customer**
- 4. Equipment Tree in Projects**
 - Parent Equipment
 - Child Equipment
 - Parent/Child Report Relationship
 - Parent Page Breaks
 - Detail vs Summary Report
 - Add Demo Templates to Projects
- 5. Project Creation**
 - Equipment Tree Structure
 - Build Demo Tree
 - Create Reports
- 6. Report Creation**
 - Individual Printing of Equipment Groups
 - Printing Complete report
 - Deficiency Tracking/Printing
 - Cover Sheets
 - Include Images/Deficiencies
 - Notes (Different From Customer Note Area)
 - Report Creation Archive

[\(Return to Table of Contents\)](#)

Additional Applications That Will Help

iPad applications - These apps are all **FREE** or have a very cheap paid version, as well as a FREE version. There is nothing over \$5 that we have seen thus far.

1. Skitch - You can photo edit, add text and numbers as well as shapes and arrows to any photo in your albums (Then the edited photo can be loaded into clipboard with great detail.)
2. B&G System Syzer - Like having a B&G wheel on your tablet or device
3. Numbers - Apple's version of Excel
4. Pages - Apple's version of Word
5. CamScanner - turns your device into a scanner for scanning and sending documents
6. Google Hangouts - Side note, if you don't have service but have WIFI available, you can use an app called Google Hangouts. This works through the Internet and you can still text people. Could be nice alternative to email.
7. PDF Expert 5 - works great for editing T&M slips and other paperwork!
8. Bluebeam

Android Applications That Will Help

1. Phonto - Similar to Skitch on the iPad
2. B+G - has a system syzer
3. Greenheck - has a fan law calculator & ductulator app
4. Carrier - makes unit apps
5. Taco pumps app
6. AHS fan curves
7. Trane 360
8. BAS suite apps

[\(Return to Table of Contents\)](#)