Verifield Concepts

What is an Item

Definition and purpose of items

Items are designed to meet the following major goals:

1. Capture, display and manage data.
2. Manage actions.

Depending on how your organization is using Verifield, an item could represent:

- An electronic form which is used to report about near miss events observed by employees of the organization;
- A special object, designed to help you manage all aspects of the audit process, which includes capturing audit-related data, providing access to necessary documents, setting tasks and tracking execution of those tasks and many other activities related to the process;
- A corrective action aimed at mitigating a specific type risk as part of the audit process.

Action management capabilities of Verifield application allow you to create and manage actions, which include, among other things:

- Creating sub-actions which help meet the goals of higher-level actions;
- Set up reminders triggered by events you specify;
- Watch the progress of actions you do not own, but which are important for you to stay informed about;
- Ability to configure permissions to provide or restrict the access to specific items or parts of the application in order to protect sensitive information or provide someone more capabilities to perform specific duties.

Life cycle of an item

Verifield allows your organization to specify the set of stages that specific types of items will go through during their life cycle. Default life cycle consists of only two stages: Open stage (which indicates that the item is currently active) and Closed stage (which indicated that all activities related to the item have been finished). Adding custom stages to the default life cycle enables to tailor the application to your organization’s business processes and makes it easier to track progress in item’s evolution.

What is a Template

Templates are the entities based on which items are created.

In order to create an item of any type, a corresponding template needs first to be created. Templates specify all possible aspects of items, including:

- Their user interface (set of fields aimed at capturing data, as well as mutual arrangement of those fields and their properties);
- Permissions (access levels for different types of users which will interact with items of this type);
- Life cycle of the items, which will be created using this template.

Once a specific template has been created, it can be used to create any number of items. Those items will have exactly the same user interface, permissions and associated life cycle stages that have been specified in the template they are based upon.

Capabilities of the Verifield platform provide system architects and administrators with a great degree of flexibility in tailoring item templates to goals of their organization
Working with Items

Overview

An item in Verifield is a specific object which is used to record data or represent actions that can be performed. Whether you need to record the information about an issue or create an action which has to be performed to resolve that issue, you need to create an item which would represent those issue or action.

Each item is an instance of a certain template. All properties of an item are completely defined by the template which was used to create that item. As an end user you are not permitted to create templates, but you can select a specific template among those available to you which will fit your needs in the most effective way.

This chapter describes how to:

1. Create an item using a template you selected;
2. Use capabilities provided by Verifield which help you share information and organize collaboration with other users who work on the item;
3. Work with the item throughout its lifecycle.

Creating Items

In order to create a new item, you have to:

1. Select a template you need.
2. Enter item information.
3. Add sub-items to the item (optional).
4. Add references to other items (optional).
5. Attach necessary files to the item (optional).
6. Add links to other resources (optional).
7. Set permissions on the item (optional).
8. Set up reminders on the item (optional).
9. Setting up an item watch (optional).

Step 1. Selecting an Item Template

1. On the main menu, click Create.
2. In the drop-down menu, expand a category where the required template is located.
3. Select the template. A blank form of the item will appear.

![Screenshot: Blank Item Form](image)

Each item, no matter what template was used to create it, has the Id, Name, and Description fields. “Basic Information” section is template-specific.
Step 2. Entering required information

The item’s form contains two sections:

1. Standard section, which contains the **Id, Name** and **Description** fields.
2. “Basic Information” section, which contains fields specific to the selected template.

In order to be able to save the item, you have to fill in all the fields marked with red asterisks. These fields are the required fields of the item and the system will not allow you to proceed further if you leave those fields blank.

The table below provides an overview of the most frequently used controls you may encounter when working with items:

<table>
<thead>
<tr>
<th>Control</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
<td>A control which allows you to specify the owner of the item.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong> Depending on template settings, you might be able to specify more than one owner using this control.</td>
</tr>
<tr>
<td></td>
<td>The owner(s) of the item can be provided with specific permissions which would allow them to perform specific actions on the item.</td>
</tr>
<tr>
<td></td>
<td>The <strong>Owner</strong> field is automatically populated with the name of the Verifield user who created the item.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong> Each item has an owner. If the <strong>Owner</strong> field is not available on the item’s form, the creator of the item automatically becomes its owner.</td>
</tr>
<tr>
<td></td>
<td>The drop-down list contains the names of all currently active users registered in Verifield.</td>
</tr>
<tr>
<td></td>
<td>All users specified in the <strong>Owner</strong> field will have the item added to their “Owned by me” widget on their dashboards.</td>
</tr>
<tr>
<td>Assigned To</td>
<td>A control which allows you to specify the user who is responsible for working on the item.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong> Depending on template settings, you might be able to specify more than one assignees using this control.</td>
</tr>
<tr>
<td></td>
<td>The assignee(s) can be provided with specific permissions which would allow them to perform specific actions on the item.</td>
</tr>
<tr>
<td></td>
<td>The drop-down list contains the names of all registered Verifield users with “Active Login” status.</td>
</tr>
<tr>
<td></td>
<td>Once the item is saved, all users specified in the <strong>Assigned To</strong> field will receive an email notification about the assignment. The item’s entry will also be displayed on their dashboards in the “Inbox” widget.</td>
</tr>
<tr>
<td>Date and Time</td>
<td>This control is used to store values in date and time format. Depending on template settings, you may be able to specify:</td>
</tr>
<tr>
<td></td>
<td>- Date only</td>
</tr>
<tr>
<td></td>
<td>- Time only</td>
</tr>
<tr>
<td></td>
<td>- Both date &amp; time</td>
</tr>
<tr>
<td></td>
<td>This field may get auto-populated in the moment you create the item with a value which is certain number of time periods (days, weeks, months or years) before or after the creation date.</td>
</tr>
<tr>
<td></td>
<td>Also, <strong>Date and Time</strong> fields can be configured by the system architect to serve as a <strong>Coming due</strong> date for the item you create. In this case the value which you enter in this field will appear in the “Due by” columns in Inbox and “Owned by me” widgets, and the system will follow the progress of the item to make sure that the deadline provided in this field was not exceeded. Once exceeded, the number of overdue days, highlighted with red color, will appear in the “Due by” column of the item.</td>
</tr>
<tr>
<td>Text Area</td>
<td>A multi-line text box.</td>
</tr>
<tr>
<td></td>
<td>If the text you enter in this field is too big to fit the space provided by the control, a scroll box will appear to make it possible to see the whole content that was entered.</td>
</tr>
<tr>
<td>Text Field</td>
<td>A single line textbox. Depending on template settings, this field may be configured to accept plain text, email, decimal number, integer, or a phone number. In all cases except for plain case, proper validation rules will apply to ensure that the input you provided is in the right format.</td>
</tr>
</tbody>
</table>
### People

Use this control to specify persons related to the item you create. For instance that could be witnesses of an incident you are reporting about.

The **People** control serves for information purposes only. It does not give any new permissions to persons which where specified in it.

The **People** list allows you to select only those users which have an “Active Profile” status in the system. These include active users who have access to Verifield, as well as contacts which may not necessarily belong to the organization you are working for.

You may also add a memo with necessary comments related to any person you’ve selected.

To add persons, in the **People** list, select persons you need, and then click the **Add** button. Selected persons will appear in the grid below the list.

**To add a memo to a person**

1. Click the **Settings** button located next to the person record;
2. In the menu, click **Notes**;
3. In **Add Notes** box, in the **Notes** textbox, enter the memo, and then click the **Add** button. An icon will appear next to the person record indicating that a memo for this person has been added.

To browse a memo, click on the memo icon.

To update a memo, click on this memo’s icon, update the memo, and then click the **Update** button.

To remove the memo, click on this memo’s icon, clear the **Notes** textbox, and then click the **Update** button.

### Lookup List

This control can be used to select one or more items from a predefined set of values.

Depending on how this control was configured, on the item’s form it may appear as a:

- Single-select list
- Multi-select list
- Array of checkboxes (which allows you to select multiple values)
- Array of radio buttons (which allows you to select a single value)

### Dynamic Fields

This control allows you to show additional fields on the item’s form depending on which element was selected in the list.

Initially, no elements are selected and no additional fields are displayed. But when you select a particular element in the list, a predefined set of fields, bound to this item, will appear. This will allow you to record case-specific information depending on the problem at hand.

### Org Profile

This control can be used to associate the item with one of the business units in your organization.

**Note** Depending on template settings, you might be able to specify more than one business units using this control.

Once a business unit was specified, all employees who belong to this business unit can be provided with special permissions which would allow them to perform specific actions on the item.

### Sub Items

This control displays sub-items of the current item. Its primary purpose is to give you the opportunity to add sub-items to the item without first saving the item itself.

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Once you’ve finished recording item information, click the **Save** button located in the upper left corner of the window. The system will save the item and will display the following additional controls which will enable you to perform further steps in the item configuration process:
Screenshot: Saved item

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>Use this button to delete the item</td>
</tr>
<tr>
<td>Add Sub Item</td>
<td>Allows you to add sub-items to the item</td>
</tr>
<tr>
<td>Add File</td>
<td>Allows you to attach files to the item</td>
</tr>
<tr>
<td>Add Link</td>
<td>Allows you to add links to external resources or to other items</td>
</tr>
<tr>
<td>Item Security</td>
<td>Allows you to modify default item’s permissions</td>
</tr>
<tr>
<td>Reminder</td>
<td>Allows you to create reminders related to the item</td>
</tr>
<tr>
<td>Watch This Item</td>
<td>Allows you to put the item on watch</td>
</tr>
<tr>
<td>Add to Favorites</td>
<td>Allows you to add the item to Favorites</td>
</tr>
</tbody>
</table>

Also, on the right side of the item’s form the following three tabs will appear. Each tab will display additional information about the item and will provide you with more capabilities in working with it:

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub Items</td>
<td>Allows you to view and perform actions on sub-items of the item. If there are any sub-items available, an integer in the top right corner of the tab will indicate the total number of those sub-items.</td>
</tr>
<tr>
<td>Attach Files &amp; Links</td>
<td>Allows you to view, add new and download attachments of the item and view links to external resources and other items. If there are any attachments and links available, an integer in the top right corner of the tab will indicate the total number of them combined.</td>
</tr>
<tr>
<td>History</td>
<td>Contains the audit history of the item.</td>
</tr>
</tbody>
</table>

To display the content of a tab just click the tab. To close a tab, click it once again or click the Close Tab link located in the upper right corner of the tab.

**Step 3. Adding Sub Items**

Verifield allows you to add sub-items to the item both before and after the item was saved. You can either create a new item or select an existing item to use them as sub-items of the item. See “Working with Sub-Items” section for details.

**Step 4. Adding references to other items**

Verifield allows you to associate the current item with another existing item. When established, such an association will allow you to see key summary data about the related item (like its name, description, stage, etc.) and navigate easily to the related item. See “Referencing and dereferencing other items” for details.
Step 5. Attaching files
You can attach files to an item to share important information with other users, who have access to this item. See “Working with file attachments” section for details.

Step 6. Adding links to external resources
You can add one or more hyperlinks to external resources to an item. See “Working with links to external resources” for details.

Step 7. Setting Up Item’s Permissions
If you are an owner of creator of an item, you re usually entitled to change default permissions of the item. Among other things, this enables you to give access to the item to specific users or groups of users, and define what they can and cannot do with the item. See “Setting up item’s permissions” section for details.

Step 8. Setting up reminders
Reminders are email notifications which contain messages related to the item. Usually, they are used to inform selected users or groups of users about coming deadlines or other important milestones for the item. You can set multiple reminders per item, or you can create periodic reminders for repeating activities. See “Setting up item’s reminders” for details.

Step 9. Watching items
Verifield allows you to put a “watch” on items which send email notifications to you every time when these items are viewed, changed or deleted by other users. Items you are “watching” can be found in your “My Watched Items” widget, or by selecting the Watched Items item under the user's menu. See “Watching items” for details.

Changing Stage
Lifecycle of an item is the series of stages through which the item passes during its lifetime, starting from its creation to eventual closure. All aspects of the item’s lifecycle (such as the number of stages in the lifecycle, their order in the sequence, stages’ titles) are defined in the item template which was used to create the item. Those aspects may vary from template to template according to business needs of your organization. However, the lifecycle of any item in Verifield always includes at least Open and Closed stages. The Open stage is always the first stage in the lifecycle. When a new item is created its stage is automatically set to Open. The Closed stage is always the last stage in the lifecycle. After you move the item to the Closed stage, the item’s entry will no longer be displayed by default on your dashboard and all fields of the item will become read-only. However, you are free to “reopen” the item if you need to start working on it again.

Changing the Life Cycle Stage of the Item
The current stage of the item is shown in the Stage list, which is located in the upper right corner of the item’s form.

Screenshot: Current Stage of the Item
You can change the stage of the item, close the item, or reopen the closed item.

To change the stage of the item
1. In the Stage list, select the required stage.

   Notes You are free to change the current stage of the item to any other stage of the item’s lifecycle available in the Stage list. This list reflects only the logical sequence of stages, but you can move the item from one stage to any other stage you need.

   Select the Closed stage only when you want to close the item.

2. In the “Confirm Action” dialog box, in the Comment textbox, leave necessary comments, and then click the Submit button.
To close the item

1. In the Stage list, select Closed.
2. In the “Confirm Action” dialog box:
   - in the Resolution list, select the type of resolution;
   - in the Comment textbox, leave necessary comments;
   - click the Close button.

You will not be able to modify fields of a closed item, and the entry of such an item will no longer be displayed on the dashboard.

To reopen the closed item

1. Click the Reopen Item button located on the right of the Stage list.
   
   **Note** The Reopen Item button is active only when the item is in the Closed state.

2. In the Confirm Action dialog box, in the Comment textbox, leave necessary comments, and then click the Submit button.

The stage of the item will be changed to Open, and the fields of the item will become available for modification.

Lifecycle History

Verifield creates an event log record each time when the item is moved from one stage of the lifecycle to another. To view the entire lifecycle history of the item, click the button located on the right of the Stage list. The “Lifecycle Summary Grid” window will appear.

![Lifecycle Summary Grid](image)

**Screenshot: Lifecycle Summary Grid**

The lifecycle summary grid provides you with the following information:

<table>
<thead>
<tr>
<th>Stage</th>
<th>Name of the stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>On</td>
<td>Date and time when the item entered the stage.</td>
</tr>
<tr>
<td>By</td>
<td>Who moved the item to this stage</td>
</tr>
<tr>
<td>Comments</td>
<td>Comment left by the user who moved the item from the previous stage to this stage</td>
</tr>
<tr>
<td>Resolution</td>
<td>Type of resolution which was selected when closing the item. This field available only for Closed stages.</td>
</tr>
</tbody>
</table>

**Note** The lifecycle summary is also recorded in the audit trail of the item. However, if you need to get a condensed view of the lifecycle summary, using method described above is preferable.
Working with file attachments and links

Working with file attachments

To view the list of all attachments associated to the current item and all its sub-items, click the Attached Files & Links tab.

**Screenshot: Attached Files & Links tab**

The Add File section of the tab displays a grid which contains one or several groups. The first group displays the name of the current item and attachments associated to it. This group is always displayed at the top of the grid. Below this grid, sub-item groups are displayed. Each grid contains attachments associated to the respective item and basic information about each attachment.

**Adding attachments to the item**

You can attach files to an item to share important information with other users, who have access to this item.

**Note** Be aware, that the system will not allow you to attach files which have EXE extension. If you attempt to do this, you will be notified with an error message.

**To attach one or more files to an item**

1. Click the Add File button. The “Upload attachments” window will appear.

**Screenshot: Upload attachments**

2. In the “Upload attachments” window either drag a required file to this window, or click the Select Files button and then navigate to a file you need. Then, repeat this procedure to add more files if you need to. (dragging files does not work when using Internet Explorer 9)
3. If you want to add a title and description to a file, click the **Add a title or description** link next to this file, enter title and description into respective textboxes, and then click the **OK** button.

4. Click the **Upload Files** button and wait until the files will be successfully uploaded. When uploaded, the background will display green.

![Screenshot: Uploaded file](image)

Uploaded files will become available in the **Attached Files & Links** tab, in the **Add File** section.

5. Click the **Close** button to close the window.

**Other actions with attachments**

To open an attached file, click on the name of the file.

To read the description of the attachment, hover the mouse over the title of the attachment. The description (if it is available) will appear in a tooltip.

![Screenshot: Tooltip with a description](image)

**To enter new or modify existing title and description of the attachment**

1. Click on the context menu 🛠️ of the required attachment;
2. On the menu, select **Edit**;
3. In the “Edit Attachment Info” box, enter new or edit existing title and description;
4. Click the **Save & Close** button.
To download attachments
1. Use checkboxes to select attachments you need to download;
2. Click the Download button.

To delete an attachment
1. Click on the context menu of the attachment you want to delete;
2. On the menu, click Delete;
3. Click Delete once again for confirmation.

Working with links

To view the list of all links to external resources associated with the current item, click the Attached Files & Links tab, and then scroll down to the Links section.

To add a link
1. Click the Add Link button.
2. In the “Add Link” window:
   - in the Url textbox, enter the URL of the resource;
   - in the Name textbox, enter a name for the link;
   - in the Description box, add an optional description of the link (optional).

   ![Screenshot: Add Link window](image)

3. If you need to add more links, click the Add button and then repeat the procedure. To finish adding links, click the Add & Close button. The added links will become available in the “Attached Files & Links” tab, in the “Links” section.

To edit a link
1. Click on the context menu of the link you want to edit;
2. On the menu, click Edit;
3. In the “Add Link” window, make necessary changes, and then click the Save button.

To delete a link
1. Click on the context menu of the link you want to delete;
2. On the menu, click Delete;
3. Click Delete once again for confirmation.
Working with sub-items

Verifield allows you to perform the following actions with sub-items:

- Add sub-items to the item
- View sub-item’s details
- Disassociate the item and its sub-items
- Delete sub-items

Adding Sub-Items

You can add sub-items both before and after you saved the item you are creating.

Adding sub-items after the item was saved

You can either create a new item or select an existing item and to use these as sub-items of the item.

To create a new item as a sub-item

1. Click the Add Sub Item button, or
   Click the Sub Items tab, and then click the Add Sub Item link.

2. In the “Add New or Existing Sub Items” window, in the “Add New Sub Item” section, enter the following information about the item you are creating:
   - In the Category list, select a category of the item template, which you are going to use to create an item;
     - Note Selecting a particular category will limit the content of the Item Template list only to those templates, which belong to the selected category. If you are not sure which category a required template belongs to, select All in the Category list.
   - In the Item Template list, select an item template you need. Once selected, custom fields of the template will appear in the “Additional Fields” section;
• In the Name field, enter the name of the item;
• In the “Additional Fields” section, fill in custom fields of the template;

3. Do one of the following:
• If this is the only or the last sub-item you intend to add, click the Add & Close button. The window will close, and the item(s) you’ve added will appear in the Sub Items tab.
• To add another sub-item (either new or existing one), click the Add button. The sub-item will be saved and a blank “Add New or Existing Sub Items” window will appear.

To Add an Existing Item as a sub-item

1. Click the Add Sub Item button or
   Click the Sub Items tab, and then click the Add Sub Item link.
2. In the “Add New or Existing Sub Items” window, in the Search Existing textbox, enter any keyword which may help you find the item you are looking for, and the press the Enter key.
3. In the grid which displays the search results, find the required item and click the Add Sub Item link located next to this item. The item will be added as a sub-item to the current item.
4. Click the Done or Cancel button to finish adding existing items, click the New Item button to add a new item, or repeat the procedure to add another existing item as a sub-item.

Adding sub-items before saving the item

You can either create a new item or select an existing item and to use these as sub-items of the item.

To create a new item as a sub-item

1. In the item’ form, fill in all required fields.
2. In the Sub Items control, click the button. The system will save the item, and the “Add New or Existing Sub Items” window will appear; (the Sub Item control is not available on all item templates)
3. In the “Add New or Existing Sub Items” window, in the “Add New Sub Item” section, enter the following information about the item you are creating:
In the **Category** list, select a category of the item template, which you are going to use to create an item;

**Note** Selecting a particular category will limit the content of the **Item Template** list only to those templates, which belong to the selected category. If you are not sure which category a required template belongs to, select **All** in the **Category** list.

- In the **Item Template** list, select an item template you need. Once selected, custom fields of the template will appear in the **Additional Fields** section; (not all item templates will be listed, depending on the settings of the primary item template there will be listed only 1 or a selection of all the available item templates)

- In the **Name** field, enter the name of the item;
- In the “Additional Fields section, fill in custom fields of the template;

4. Do one of the following:
   - If this is the only or the last sub-item you intend to add, click the **Add & Close** button. The window will close, and the item(s) you’ve added will appear in the **Sub Items** control.
   - To add another sub-item (either new or existing one), click the **Add** button. The sub-item will be saved and a blank “Add New or Existing Sub Items” window will appear.

**To Add an Existing Item as a sub-item**

1. Fill in all required fields.
2. In the **Sub Items** control, click the button. The system will save the item, and the “Add New or Existing Sub Items” window will be displayed; (the Sub Item control is not available on all item templates)
3. In the “Add New or Existing Sub Items” window, in the **Search Existing** textbox, enter any keyword which may help you find the item you are looking for and press Enter;
4. In the grid which displays the search results, find the required item and click the **Add Sub Item** link located next to this item. The item will be added as a sub-item to the current item and a new row will appear in the **Sub Items** control; (not
all item templates will be listed, depending on the settings of the primary item template there will be listed only 1 or a selection of all the available item templates)

5. Click the Done or Cancel button to finish adding existing items, click the New Item button to add a new item, or repeat the procedure to add another existing item as a sub-item.

Viewing Sub-Items

To view available sub-items, click the Sub Items tab.
The grid in this tab displays the list of current sub-items and makes available basic information about each sub-item.
To open a required sub-item, click on its name or ID.

Disassociating the item and its sub-item

Disassociating the item and its sub-item means to break the relationship between them. This operation will not delete the sub-item. You will be able to access the sub-item from the dashboard, search or reports.

To disassociate the item and its sub-item

1. Click on the context menu associated with the sub-item you want to disassociate.
2. In the menu, select Disassociate.
3. In the confirmation window, click the Disassociate button.

Deleting Sub-Items

This operation will permanently delete the item. Once deleted, the sub-item will available from the dashboard, search or reports.

To delete a sub-item

1. Click on the context menu associated with the item you want to delete.
2. In the menu, select Delete.
3. In the confirmation window, click the Delete button.

Deleting items

To delete the item

1. Click the Delete button.
2. Click the Delete button again for confirmation.