

Table Builder Instructions

1 - Basic Details

In this example of a Parent Table labeled “TB-Example” we are showing a Validate Scans service type for which scans are validated against an associated database. An invalid scan is not added to the table. You can also create a Record Scans service types where all scans are added to the table.

The scans made for this table are NOT saved in the associated database; instead, the scans create a separate table with one or more “Table Views”. You can have as many Table Views as you would like, or you can have one by itself. You configure these views for your app users. These can vary based on the app user’s data collection task. We also refer to these views as “Services”.

Create Curated Service: Table Builder

[← Go back](#)

Details

Name

Service Type

Records Scan (Online in Real time)
Save barcode values after scanning.

Validate Scans with a Database (Online in Real time)
Check each scanned barcode against a database.
Where would you like the validation to happen?
Database:
 [↻](#)
[show Tracking Process](#) or [create a new one](#)

Also show questions when the barcode is invalid or not in the database.

Delete Associated Data

Manage Share URL template myself Do not sync for me. I will directly add, remove and reorder Share URL columns myself.

Create

Notes: If you check “Delete Associated Data” that allows you to remove rows from the Share URL report (see below). When removed, the scan records are still saved but they are no longer in the consolidated report. If you check “Manage Share URL template myself” you can edit the Export Template and maintain those edits. You do not have to edit the template but if you do - and you don’t check this option - then when you make changes here within this Table Builder they will override the template changes you’ve made.

2- Add Table Views

Next, you can add “Child Tables” or table views based on the steps in our tracking process. The first step is assembly, so we name the table view accordingly.

Edit Curated Service "TB-Example"

Template: Table Builder [Go back to listing](#)

Save

TB-EXAMPLE ASSEMBLY ; +

Details Users Questions Share URL Advanced

Name: Assembly

Description:
 Provides instructions to users after the service is selected. Can include HTML - See our knowledge base for more information.

3- Authorize Users

For each table view, we can add whichever users we need to access this step in the process. That could mean all of your users, a few users specifically, or only one.

Edit Curated Service "TB-Example"

Template: Table Builder [Go back to listing](#)

Save

TB-EXAMPLE ASSEMBLY ; SHIPPING ; INSTALLATION ; WARRANTY ; +

Details **Users** Questions Share URL Advanced

Authorize Users

Set permissions for the users you would like to access this service.

Filter Users:

Type to begin filtering...

Select All

tb-example-1

4 - Configure Questions Step

You can [create your questions](#) in advance on the Questions page or you can create them here.

Note: Timestamps automatically become part of every scan record but they typically are meant to be viewed just by the admin in a Share Link or when exported. The reason "Date" questions are used **in this example** is that the [device date](#) may be useful within some **app-user views**. The point is, adding date questions is not necessary unless the app user must also see it as part of the table view in subsequent scans.

- a) A question that is needed by any table view must be moved from the right column to the left column under the parent table tab - in this example, the parent is the "TB-EXAMPLE" table.

Edit Curated Service "TB-Example"

Template: Table Builder [Go back to listing](#) Save

TB-EXAMPLE +

Details Users **Questions** Share URL Advanced

Questions

Select the order of questions asked upon each scan by dragging questions in the fields below... Add a Question

Post-Submit Questions	Available Questions
Silicone Type	Type to filter available questions...
Assembly Date	Install Location
Shipping Date	This ID is not in the database. You may provide information here for review.
Install Location	This item is not in the database. You may provide
Installation Date	

- b) Next, on each table view, we can authorize the users on this section of the process are allowed to view as well as what they are able to edit.

Edit Curated Service "TB-Example"

Template: Table Builder [Go back to listing](#) Save

TB-EXAMPLE ASSEMBLY : +

Details Users **Questions** Share URL Advanced

Questions

Post-Submit Questions
Silicone Type
Assembly Date
Shipping Date
Install Location
Installation Date

Click the icons to toggle to the right combination. Here are the meanings:



In the above example, we only need the user of the ASSEMBLY table view to view and edit the questions regarding silicone type and assembly date and nothing else.

Later, in the INSTALLATION table view, the app users can only view the questions pertinent to their step in the process.

Edit Curated Service "TB-Example"

Template: Table Builder [Go back to listing](#) Save

TB-EXAMPLE ASSEMBLY : SHIPPING : **INSTALLATION :** +

Details Users **Questions** Share URL Advanced

Questions

Post-Submit Questions	
Silicone Type	
Assembly Date	
Shipping Date	
Install Location	
Installation Date	

For comparison, the final table view, WARRANTY, has the app user able to view all of the preceding questions but unable to edit any.

Edit Curated Service "TB-Example"

Template: Table Builder [← Go back to listing](#)

Save

TB-EXAMPLE ASSEMBLY : SHIPPING : INSTALLATION : WARRANTY : +

Details Users Questions Share URL Advanced

Questions

Post-Submit Questions

Silicone Type	👁️	🗑️
Assembly Date	👁️	🗑️
Shipping Date	👁️	🗑️
Install Location	👁️	🗑️
Installation Date	👁️	🗑️

5- Share URL Step

You will likely want to edit the [Export Template](#) for naming the columns, the order, etc. And if you want to have a web view of the Share Link you will need to edit it to **“require user login”**. Note: a [“user”](#) is an app username and password, though these credentials don’t need to be given access to scan.

Edit Curated Service "TB-Example"

Template: Table Builder

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Save

TB-EXAMPLE



Details

Users

Questions

Share URL

Advanced

Share URL

TB-Example



Template name: **TB-Example**



created on: Aug 01, 2019 01:28 PM

Your CSV export contains the following columns:

Property: **Original Scan Value**

User Name

Timestamp (Scanned)

Question: **Silicone Type**

Question: **Assembly Date**

Question: **Shipping Date**

Question: **Install Location**

Question: **Installation Date**

Manage Share URL template myself

Do not sync for me. I will directly add, remove and reorder Share URL columns myself.

Share URL:



<https://secure.codereadr.com/share/95fe1125350a100e49ee939853823349>

6 - In this example, we chose to validate scans against a database so the app user would see a description ("Model XYZ-A") of the asset scanned in the "response". It's also valuable to have a database so that app users know what is intended to be tracked and, if for some reason the barcode is damaged, they can use the app's Lookup option to select the asset.

You can use our API to upload the database, or you can [manually upload a CSV file](#) using the web UI. The response can be simple text, structured text, or HTML formatted text [showing web content](#).

Search Barcode Values and Response

Basic Search

Advanced Search

Q Values and Responses

Search

Clear Search

Barcode Value

Showing 1 - 2 of all 2 Values.

First Previous **1** Next Last



A1234567890

Model XYZ-A

Barcode

Edit

Delete



Response



B1234567890

Model XYZ-B

Barcode

Edit

Delete

First Previous **1** Next Last

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