Ecolab® Digital Food Safety
User Help and Documentation

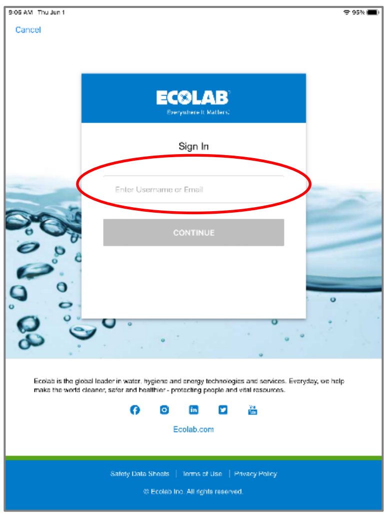
Last updated October 2023

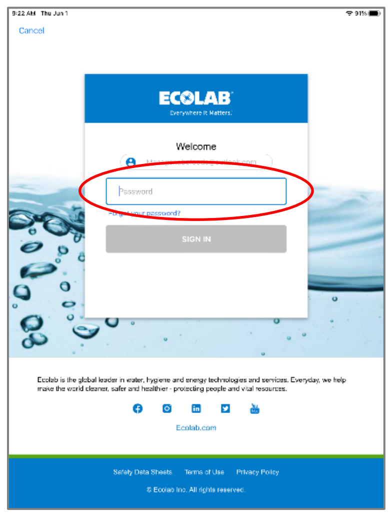
Contents

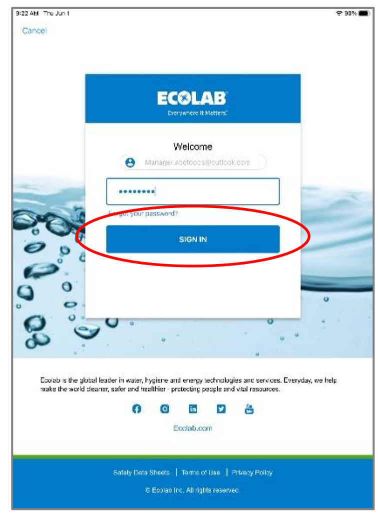
Quick Start Guide

NEW LOGIN PROCEDURE – LOGIN PROCESS CHANGE FOR ALL USERS AS OF DECEMBER 2021

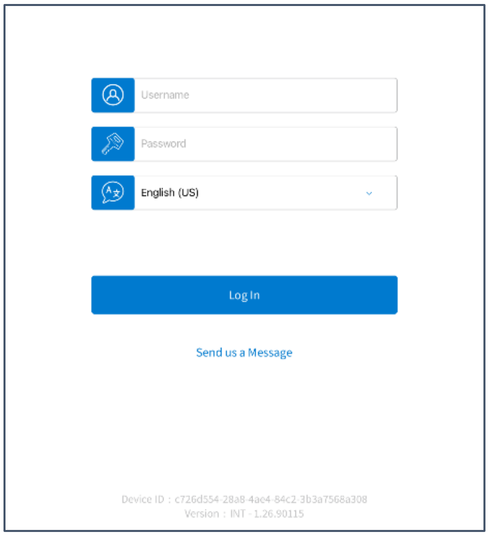
1. On FIRST LOGIN TO THE MOBILE APP, users will need to enter your **Company Name** to ensure we are directing to the correct login screen





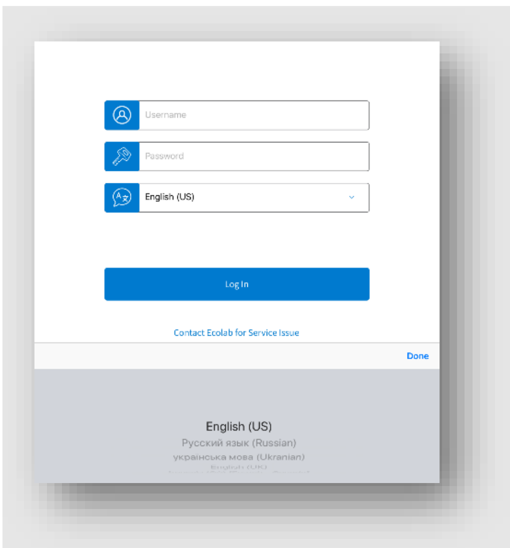


2. Click Next (if typed incorrectly, you may receive an error that a match could not be found)
3. For some customers, you may need to select a country
4. Click Log in
5. Log in with your username and password.



Note: Users can Get Support by clicking on Send us a Message

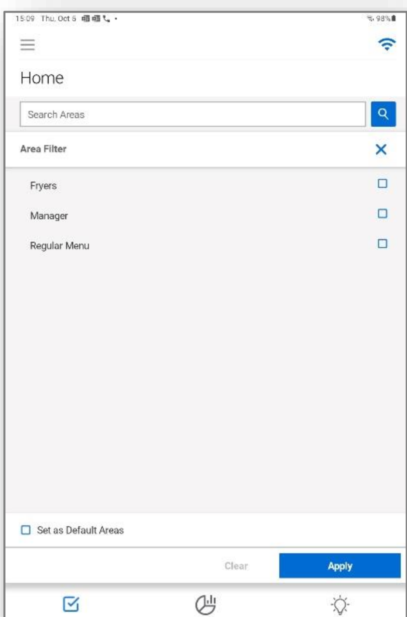
6. Select a Language (English US is default unless there is a different default configured in Checklist Management Tool for the Account Brand of the location the user is tied to).



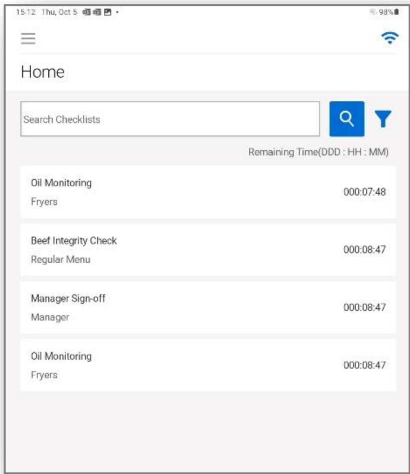
7. Click Log In
8. Accept 'Terms of Use' if prompted.

Note: If you select Decline, you will be returned to the Log In screen. If the Terms of Use function is active, you ***must*** *Accept to use the application. If the Terms of Use/Privacy document is updated, you will be prompted to Accept again.*

9. Select an Area



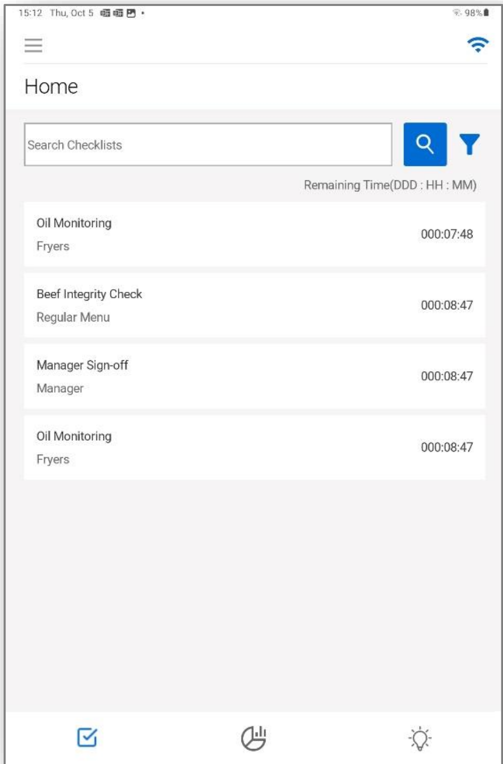
10. Select a checklist tile



11. Complete all required questions.
 Note: Not all questions may be required on a checklist. The Submit button will only be active and turn blue once all requirements have been met.

12. Submit the checklist.

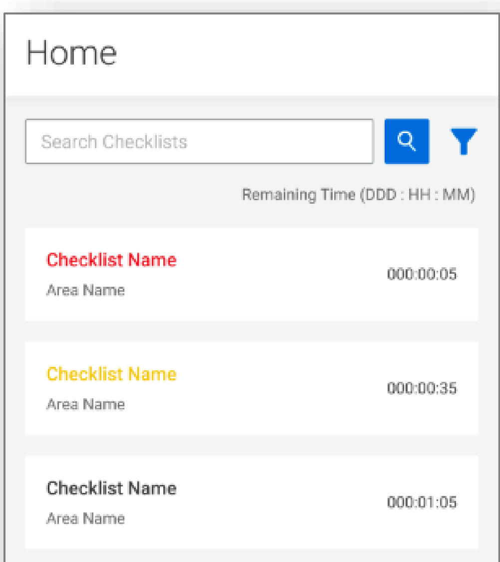
Home



The Home page lists all Checklists assigned to them.

Checklists

After filtering on an area name, you will see the active checklists



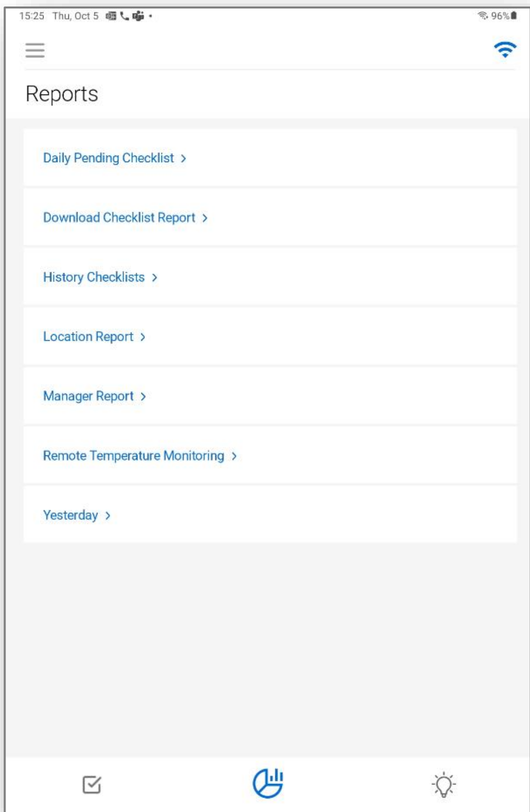
Checklists can be completed any time before the "Remaining Time" listed on the right.

A checklist that will expire in 16-30 minutes from now will have its time highlighted in yellow.   A checklist that will expire in 1-15 minutes from now will have its time highlighted in red.

If a user is in the middle of a checklist and the checklist expires, the checklist will automatically be submitted and the Submit button becomes disabled. If all questions are complete, the auto-submission will be submitted as complete. If required questions are not complete, the auto-submission will be submitted as expired.

Daily Pending Checklists

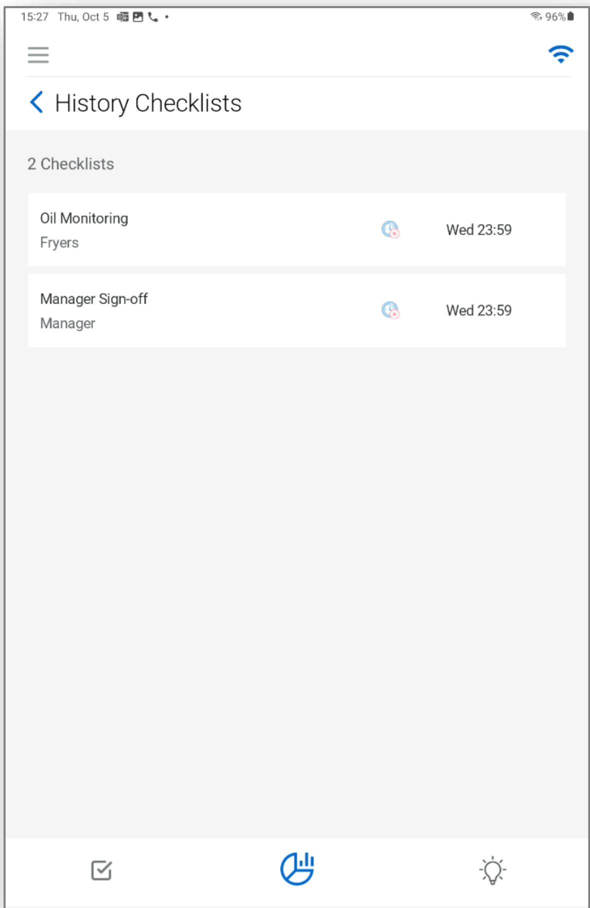
Checklists that have a start time that is up to 12 hours from now will be displayed on the "Daily Pending Checklist" report under the Reports tab.



Some checklists may have a parenthesis with a number next to the checklist name. The number in parenthesis is the number of times this checklist is required to be completed this day. The number will reduce as the checklists are completed if all questions are compliant. If responses are not compliant, the number will not be reduced.

History (Completed Checklists)

Checklists that have been submitted or have not been submitted by the Remaining Time will be found in the "History" report.



The Submission Time of each checklist is shown on the right for each completed checklist. An expired checklist that was not submitted will be timestamped with the time the checklist was due.

Checklists appearing in the "History" report cannot be edited. Some checklists' titles may have additional response information included in the checklist title name depending on the settings. Adding this response information may be used as a reference for other questions.

Example: A location may have 6 different grills each numbered 1 through 6. If an associate uses grill #2 while completing the Breakfast Sausage Internal Temperature Checklist, the completed checklist will show Breakfast

Sausage Internal Temperature – Grill 2.

The  icon indicates that a checklist was completed prior to the expiration time.

The  icon indicates that a checklist was partially completed prior to the expiration time

The  icon indicates that a checklist was not completed prior to the expiration time.

Completing a Checklist

To complete a checklist, click on the name of the checklist in the Home tab.

The page will display the questions that have been assigned to that checklist.

As you respond to each question, the app will record the date and time you respond to each question and the gray bar along left side of question will change to blue. A progress indicator at the top of the screen will show you the total number of questions and the number you have completed.

A question with check box selector option "Select this if not available", allows the question to be removed from the checklist for that instance, or that instance and all future instances. The Question Not Available feature is visible to the Manager role only.

Press Submit once all required questions are complete.

Types of Questions

There are several types of questions that could be on a checklist that you are completing. To answer a question, click on the text that indicates the response you wish to respond with.

While you are completing questions, responses will be marked as "In Compliance" or "Out of Compliance".

Yes/No Question Type

These questions allow a user to respond to a question where up to three possible responses are available. The most common response options are "Yes", "No", and "Not Available". Corrective actions may be required for any responses considered to be Non-Compliant.

Choice Yes/No Question Type

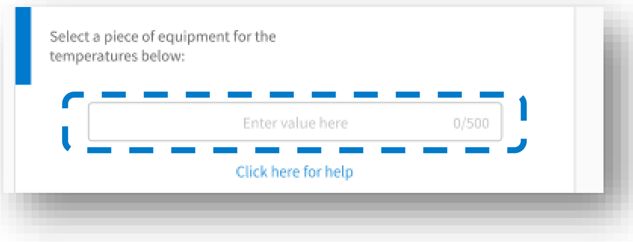
These questions require you to select a food item that you are responding to the question about then select the response. The most common response options are "Yes", "No", and "Not Available". Corrective actions may be required for any responses considered to be Non-Compliant.

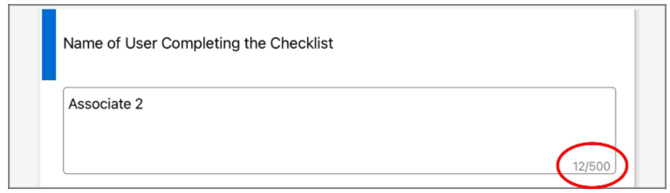
Choice Question Type

These questions allow a user to tap on the field to display a list of possible responses. A user can select a response and tap "Done" to select a response.

Single Line of Text Question Type

These questions allow users to enter free text of up to 500 characters into a text box to respond to the question. For these question types, users will see a character countdown to help see how much free text has been entered and how much remains.





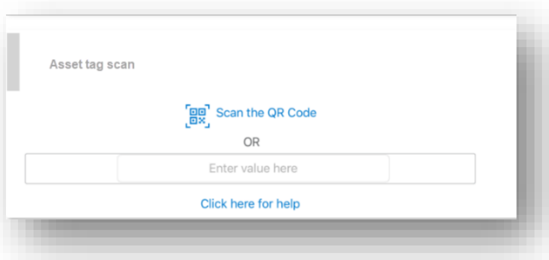
Numerical Range Question Type

These questions allow users to either manually or use the slider to enter a numeric value (containing up to 2 decimals) in response to a question. The defined range of allowed responses is shown beneath the slider. An infinity symbol (∞) is shown if the question has no maximum value. A negative infinity symbol (-∞) is shown if the question has no minimum.

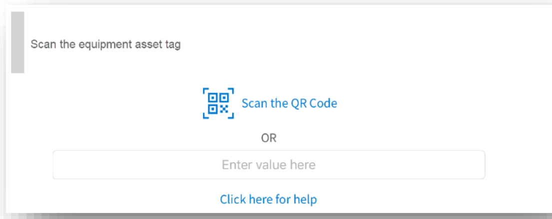
QR Code Question Type

These questions allow users to either enter free text of up to 25 characters into a text box to respond to the question or use the camera on their device to scan a QR code.

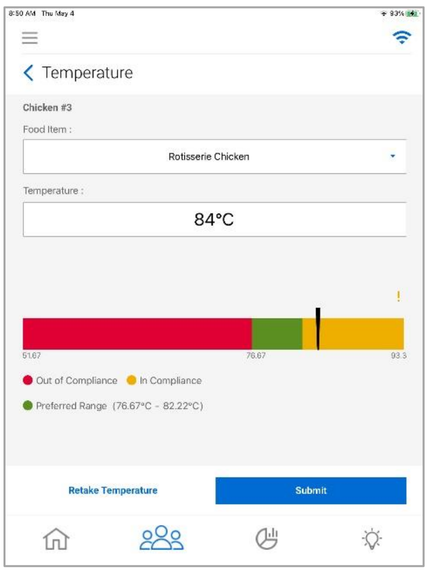
Completing a QR Code question on devices with a scanner (IE: MC40, TC70, TC70X): To use the QR Code scanner to supply an answer, tap into the field "Enter value here" and point the infrared eye at the QR code and press the scan button. Data associated with QR code will be inserted as a text string into the checklist and you will be automatically returned to the checklist. If data exceeds 25 characters, only the first 25 characters will be captured and recorded as your answer.



Completing a QR Code question on devices which do not have a scanner: To use the QR Code scanner to supply an answer, tap "Scan the QR Code" and your device's camera will launch. Point the camera at the QR code. Data associated with QR code will be inserted as a text string into the checklist and you will be automatically returned to the checklist. If data exceeds 25 characters, only the first 25 characters will be captured and recorded as your answer.



Temperature Question Type



These questions allow users to select a food item and record a temperature for that item.

To record a temperature,

1. You must first select the type of food for which you are taking a temperature. If there is only one possible choice, this value will be pre-filled for you.
2. Once you have selected a food item, a temperature gauge will display on the page with the "In Compliance" temperature listed for that food item.
3. Click "Submit" to confirm the temperature displayed is the temperature to submit.

Bluetooth Temperature

If you are using a low energy Bluetooth thermometer, the app will detect the thermometer and begin measuring the temperature. The temperature will display in the Temperature field **with the Bluetooth icon next to it** and the connected device will list beneath it. Click "Submit" to record the temperature.

You can tap "Re-scan" to retake a temperature if needed.

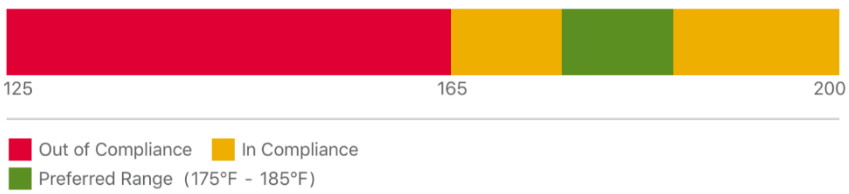
If the device shown is not the thermometer that you are using, tap on "Not this device? Click here." to rescan for the correct thermometer.

You can also tap "Enter Manually" to override the Bluetooth temperature. The system tracks which temperatures were taken with Bluetooth and which were not.

Depending on your corporate configuration, the auto-capture functionality may be turned off. In this situation, a user will capture the temperature using the Bluetooth thermometer by pressing the corresponding button on the thermometer again which locks-in the temperature.

Preferred Temperature Range

A corporate customer can determine a preferred temperature range to meet that organization's quality standards. If your company has a preferred range, it will be indicated by a Red, Yellow and Green temperature gauge.



Manual Temperature Entry

By tapping on the "Enter Manually" link, you can manually type in the temperature from the thermometer using the number keys on the device.

Once you saved a temperature, it will be displayed on the checklist, along with the type of food for which you took the temperature.

Auto-Advance Temperature Questions

These questions automatically advance to the next temperature question in the list when a user is required to take several temperatures in row. It allows users to capture temperatures in a timely manner without having to return to the checklist. Users can track their progress by viewing the indicator at the top of the question box.

If a question is "out of compliance", it will require corrective actions to be completed. In this circumstance, the user will be brought back to the checklist where the next question can be selected, and progress continued.

Auto Response Compliance Question Type

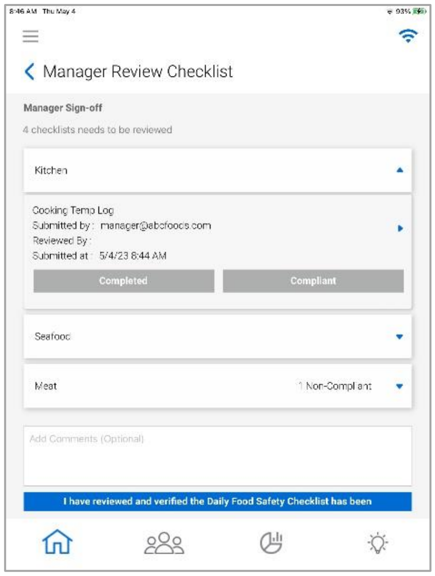
These questions automatically respond "Yes" or "No" to whether all previous temperatures taken in previous questions on the current checklist were recorded as a compliant temperature.

Auto Response Preferred Question Type

These questions automatically respond "Yes" or "No" to whether all previous temperatures taken in previous questions on the current checklist were recorded within the corporate preferred range.

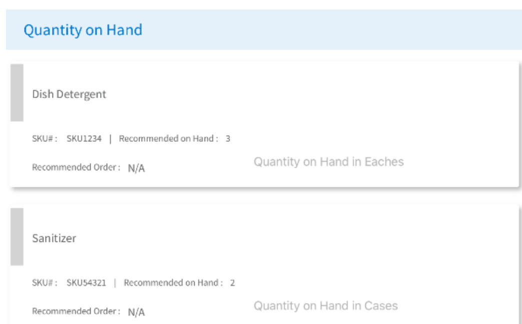
Approval Action Type

These questions allow a Manager to provide approval for checklists shown in the Review and Signoff checklists after they have reviewed them.



Inventory Question Type

These questions allow you to document the on-hand inventory for specific products in cases or eaches. It will compare current on-hand inventory against the recommended quantity set by your company and suggest a reorder size.

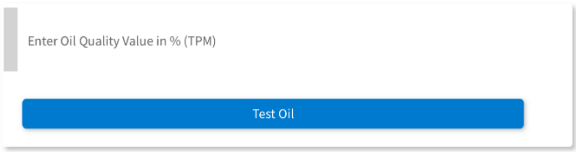


Oil Monitoring Question Type

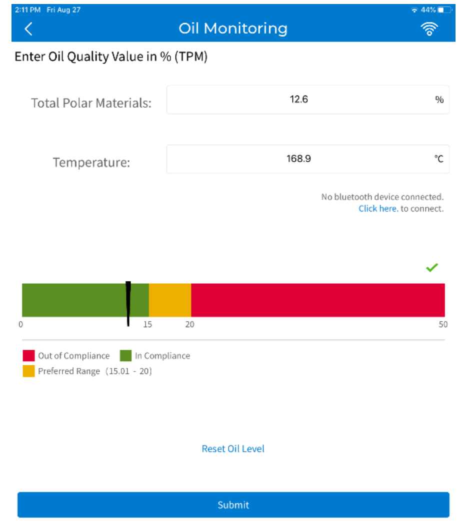
These questions allow users to provide a measurement as a percentage of Total Polar Materials (TPM) to evaluate the quality of cooking oil.

To record a TPM value:

1. Press the Test Oil button.



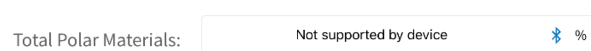
2. Enter a value in % TPM value.
3. Optionally enter temperature of the cooking oil.
4. Press Submit button to submit the value or press Reset Oil Level to re-enter.



Bluetooth Oil Device

If you are using a low energy Bluetooth oil tester, the app will detect the device and begin measuring the TPM and temperature values. The TPM value will display **with the Bluetooth icon next to it** in the Total Polar Materials field and the connected device will be listed beneath it. Use the record button on the device to capture the TPM and temperature values.

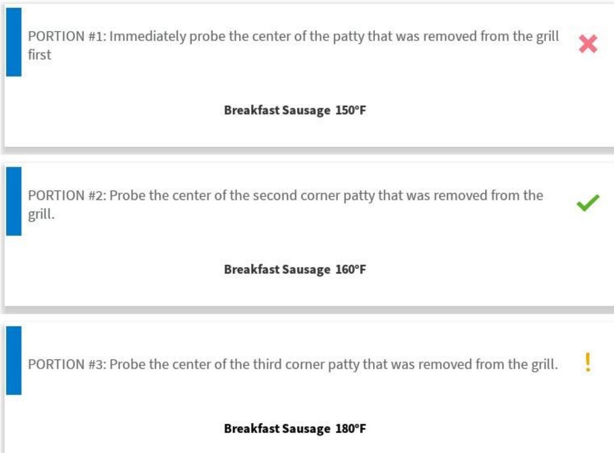
If the connected device shown does not support this functionality, a "Not Supported" message will display in the Total Polar Materials field.



Tap on "Not this device? Click here." to rescan for the correct device or record the values manually.

Responding In Compliance / Out of Compliance

As you complete a checklist, a response will be considered "In Compliance" with Food Safety Regulations or "Out of Compliance".



The icon will indicate that a question has been responded to "In Compliance" with Food Safety Regulations. There is no additional action required.

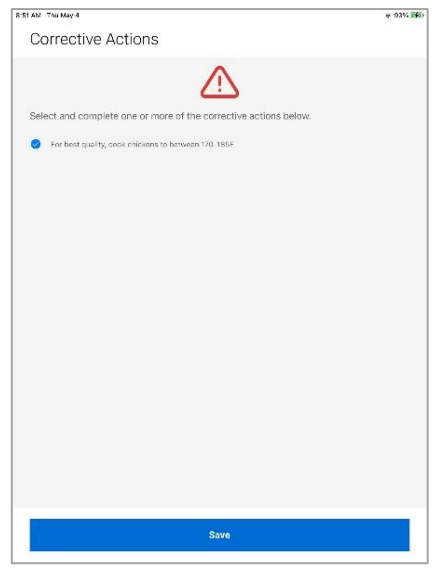
The icon will indicate that a question has been responded to in a way that is "Out of Compliance" with Food Safety Regulations.

The icon will indicate that a temperature has been responded to in a way that is "In Compliance" but does not meet the preferred range of the food item. This can help drive food quality.

Upon answering a question that is out of compliance with Food Safety Regulations, you will be required to select a Corrective Action.

Corrective Actions

By selecting a corrective action, you are agreeing to complete the action to resolve the out of compliance issue.



The Save button will not become active until at least one corrective action is selected.

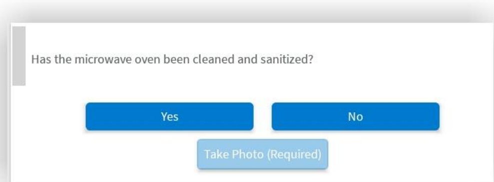
Depending upon the checklist configuration, some corrective actions may be selected by default but can be unselected if it is not an action that will be taken to resolve the issue.

Other corrective actions might be required and cannot be unselected.

Once you have selected a corrective action, you may have the option to take a photo.

After clicking the save button, the temperature response for the question that you are completing will appear on the screen as follows:

Take Photo Option



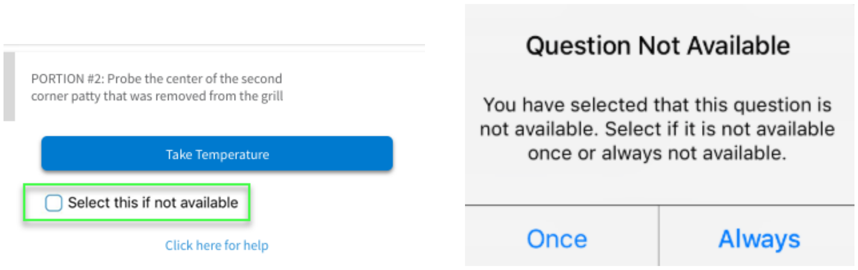
Some questions will allow you to take a photo or will require you to take a photo.

If a photo is required, indicated by (Required) next to the Take Photo text, you will not be able to submit a checklist until all required photos are taken for each question.

Question Not Available feature

If configured on a question, this option is presented to Managers. Associates are unable to see or select this option.

To mark a question not available tap/click the check box option "Select this if not available". To make the question not available for the current checklist instance, select, "Once". To make the question not available for the current and future instances, select, "Always".



ABOVE: Associate view of a Question Not Available.

Date and Time

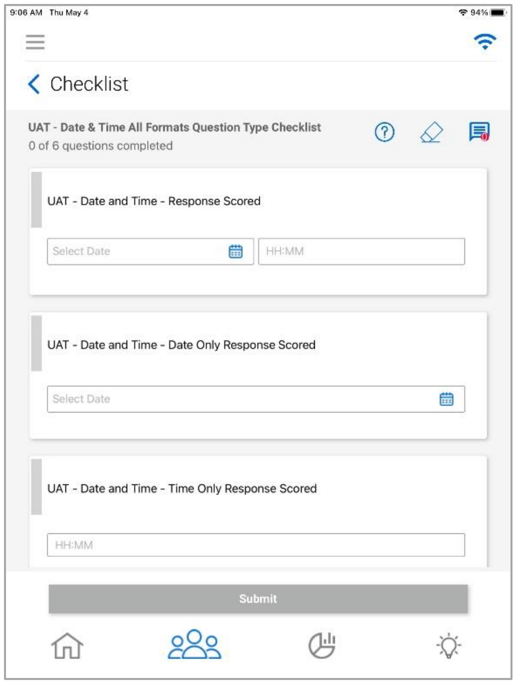
Allows Checklist Administrators to use the Checklist Management tool to update the date and time format for all users in their market <u>and</u> create date and time questions

New Question type that allows users to create questions to be answered with a data and/or time:

- Record Product Expiration and Lot Codes for Tracking
- Record Exact Time of Deliveries
- Record Exact Date or Time Something Occurred
- Record Grinding logs or Production time

<u>Please Note:</u>

Date and Time will default to 24 period – Please update to 12-hour format if you do not wish to see in the updated 24 period in our Checklist Management Tool



Mobile Application Date & Time Question Example

Add Comment

You can add a general comment to a checklist, or to a specific question. To add a Comment, click on 

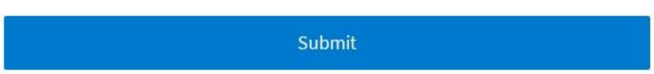
Comments may be added to the checklist or question level.

Saving a Checklist

Checklists are automatically saved every few seconds or whenever you answer a question. If you need to stop completing a checklist after you have started one, it will be saved for later and you can come back to it prior to the expiration time listed on the Active Tab.

Submitting a Checklist

Once you have responded to all required questions on a checklist, the "Submit" button will become enabled and you can tap on it to submit the checklist. A submitted checklist cannot be edited.



Clearing a Checklist

If you have made a mistake on a checklist, you must clear all the responses on a checklist and answer all questions.

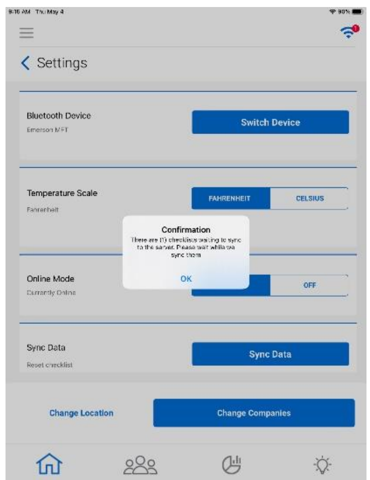
To clear a checklist, tap on  in the upper right corner of the app.

Sync Checklist Data

If there are missing checklist(s) or the text on the page is not as expected on the device, you can sync up with the server with the most current data. <u>Warning:</u> Any partially answered checklists that have not been sent to the server will be permanently removed.

To sync checklists on the device:

1. Device is in Online mode.
2. Tap the Sync Data icon. 
3. Review and respond to the popup message: This action will reset your local database, and you will permanently lose your partially answered checklists that have not been submitted to the server.



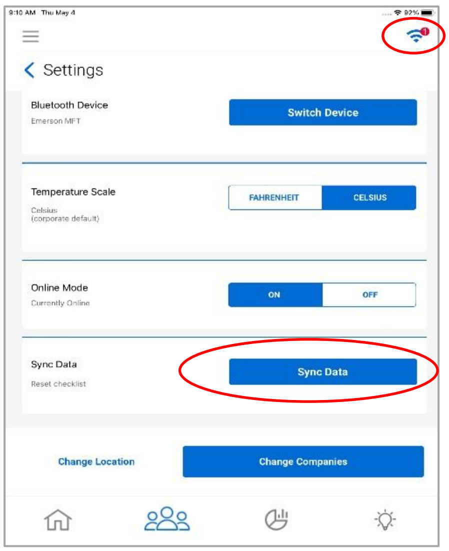
Checklists Waiting to Sync – Badge Display

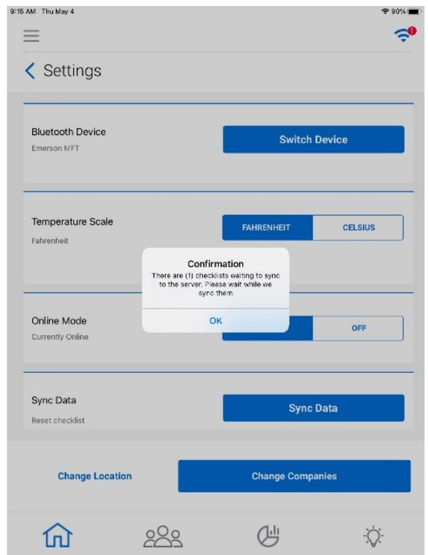
WiFi connectivity can vary and, as a result, users may not always know if completed checklists have been able to sync. So that users have a better understanding in this regard, the application will now display a Badge showing the number (if applicable) of checklists waiting to sync on a given device.

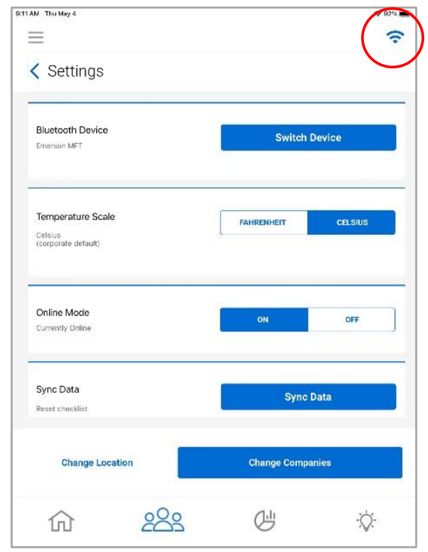
If the badge is visible, this communicates to the user that they should find an area where they can successfully sync completed checklists. The display badge will disappear once all checklists have been able to sync to the server.

If you see this Display Badge, navigate to the More tab and then to Settings. Once you have better connectivity and are back online, press the Sync Data button. Any checklists waiting to sync, will begin to sync to the Ecolab server.

`







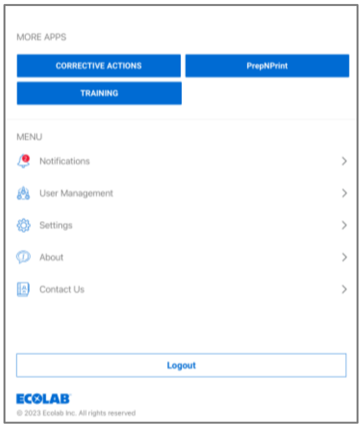
If you attempt to logout of the application prior to all checklists successfully syncing to the server, a popup message will appear informing you that there are checklists still waiting to sync.

Once all checklists have successfully synced, the Red Badge display (and associated number of checklists waiting to sync) will disappear.

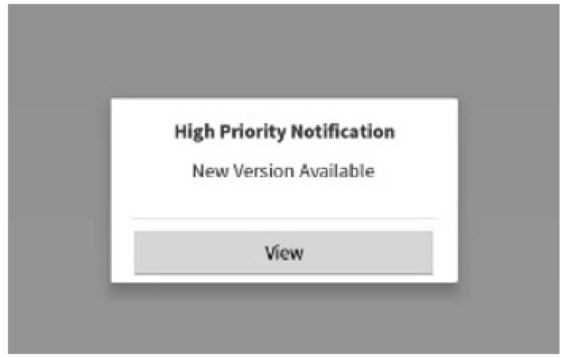
Notifications

Push Notifications

The corporate office may need to send occasional notifications about important information, such as product recalls or safety standards. You will see a pop-up screen notifying you of all High Priority notifications that you must click on to view in order to exit the screen. Note: When a notification has not been viewed on the device, the Menu will present a red dot.



Above: Existing Notification

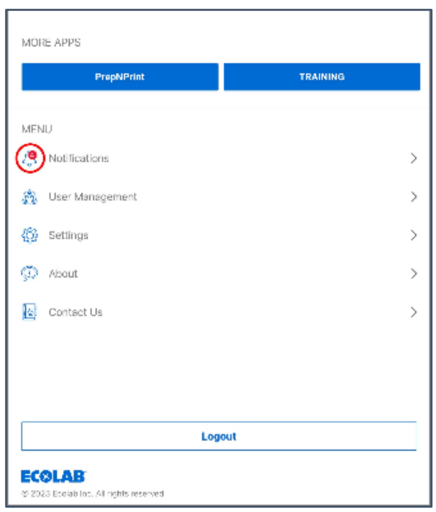


Above: Popup screen

To access all other notifications:

1. Go to the Menu tab
2. Select Notifications

The number in the red badge indicates the number of unread notifications on your device.



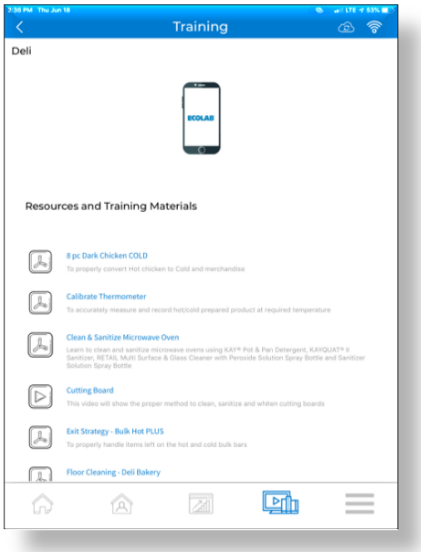
Training

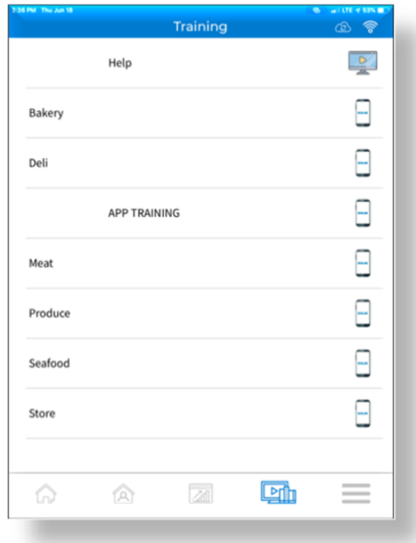
The Training Page provides training materials to all users to assist daily operations and training sessions. The training materials come in a variety of formats that are viewable right in the application and are categorized by area.

To access training:

1. Go to the Training tab
2. Select an area
3. Click on the training video or document

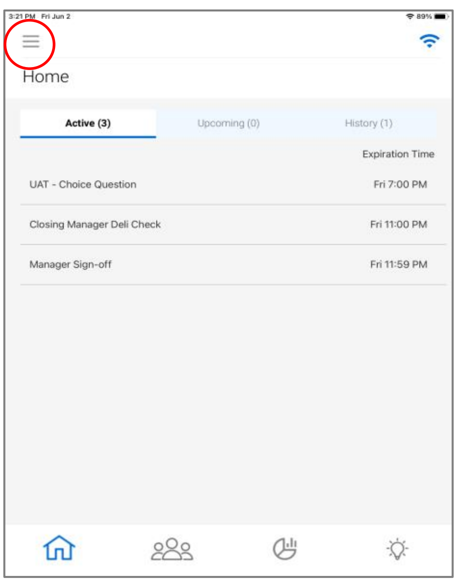
Note: If you are offline, only this help guide will be available. Other training materials are only available while connected to wi-fi or cellular. Users are offline when the signal icon has a slash through it.

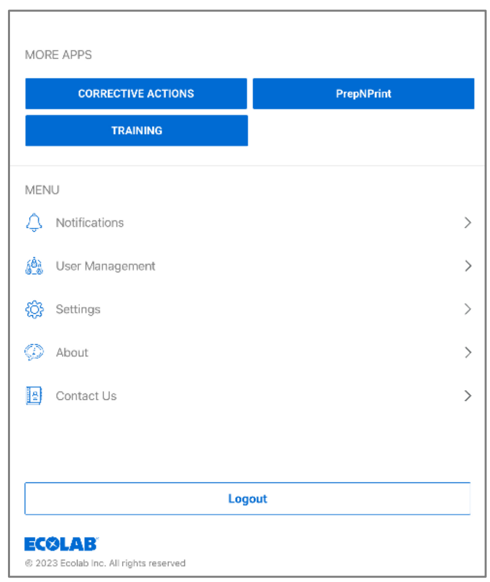




More Menu

More is where you access the following: Notifications, User Management, Settings, About, Contact Us and Logout.





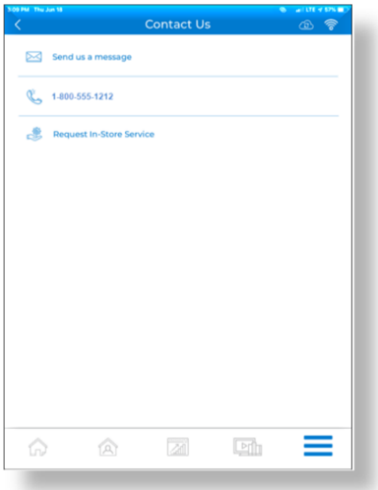
Above: How to Access More Menu

Above: More Menu

To access more:

1. Click on the ellipsis in upper left (circled in red)
2. Select the page you wish to view

Contact Us



If you have any questions, comments, or issues, please use one of the various methods to contact Ecolab. Users can initiate contact by phone, from the log in screen, or on the "Contact Us" menu option in the app.

From the Log In Screen:

1. Click Send us a Message link
2. Complete Questionnaire
3. Click Submit

From the "Contact Us" option:

1. Select 'Send us a message' link, complete the questionnaire and submit to create a ticket (must be configured to display for the Account/Brand in our Checklist Management Tool Corporate Config)
2. Call the number provided for assistance (must be configured to display for the Account/Brand in Checklist Management Tool Corporate Config)
3. Select 'Request In-Store Service' option for non-app related issues such as an emergency equipment service request, complete the questionnaire and submit (must be configured to display for the Account/Brand in Checklist Management Tool Corporate Config).

About Screen

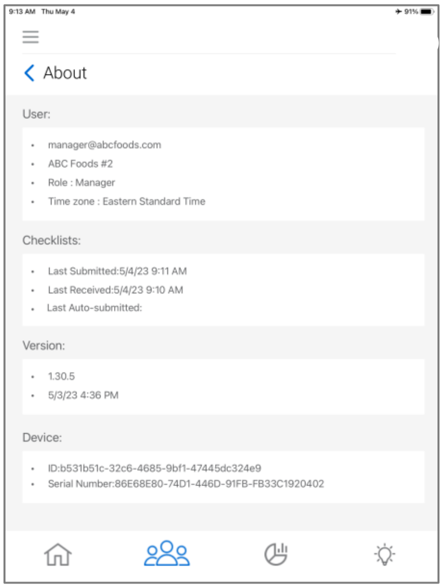
The About screen plays an important role when users are talking to Customer Service. If you are experiencing difficulties that require a call to Customer Service, key information is listed on the About page.

User: This section provides the username, location that a user is signed in to, and the user's role.

Checklists: This shows submission information that can help with diagnostics.

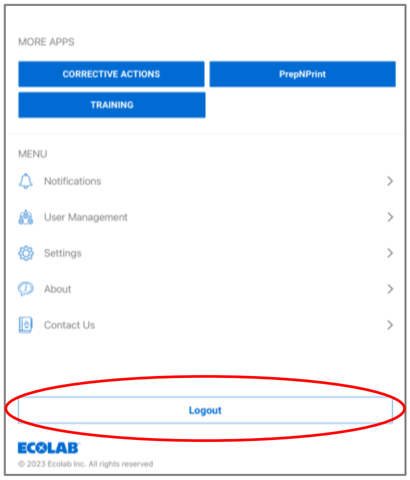
Version: This tells what version of the application is being used and when it was last updated.

Device: This provides the unique id number for the device being used.

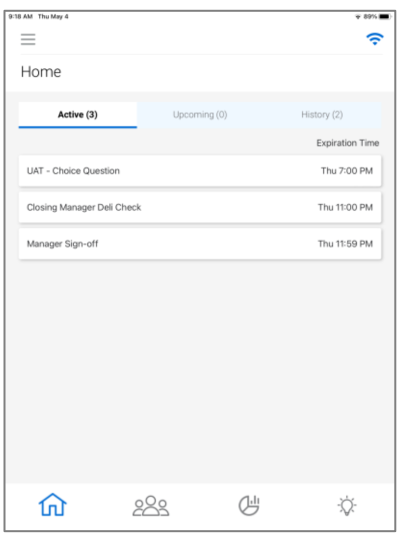

About
User:
manager@abcfoods.com
ABC Foods #2
Role : Manager
Time zone : Eastern Standard Time
Checklists:
Last Submitted:5/4/23 9:11 AM
Last Received:5/4/23 9:10 AM
Last Auto-submitted:
Version:
1.30.5
5/3/23 4:36 PM
Device:
ID:b531b51c-32c6-4685-9bf1-47445dc324e9
Serial Number:86E68E80-74D1-446D-91FB-FB33C1920402

Log Out

1. Click on Menu (Ellipsis up top)
2. Select Log Out (now at middle bottom of page)



Manager Home



You must log in with manager credentials in order to access the Manager Home page. The Manager Home page will display information and actions that are important to a Store Manager.

Manager Checklists

Manager checklists follow the same rules as Associate Checklists for displaying on the Current, Upcoming or History tabs.

The number in the parenthesis next to the "Manager Checklists" title is the number of "Active" checklists that are available in Active tab.

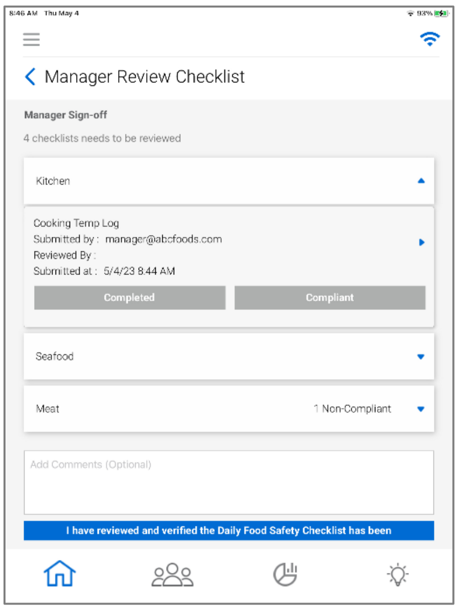
Manager Sign-off Checklist

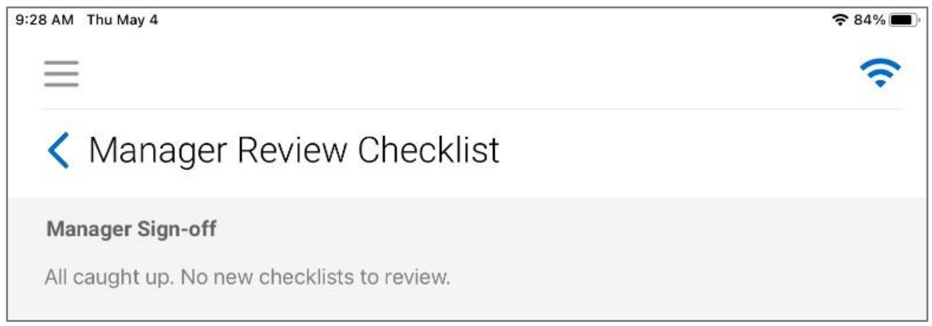
If enabled for your location, the Manager sign-off checklist will always appear on the Active tab of the Manager Home page.

When you open the checklist, any checklists that have been submitted since the last review will be visible under their checklist Area. You can review the details of any submitted checklist simply by tapping on it.

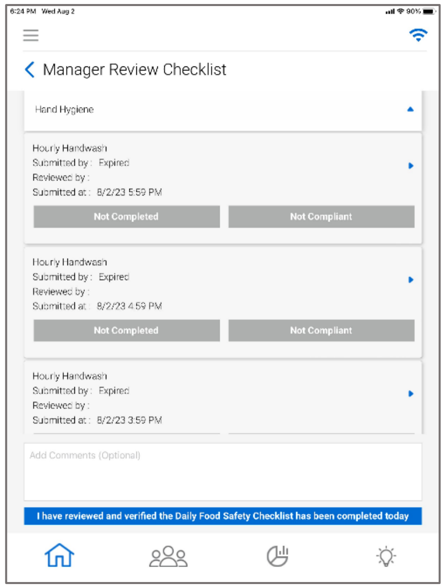
Once you have reviewed all submitted checklists, simply press "These checklist(s) have been reviewed" button. Checklists should be reviewed at least once per day.

If no checklists have been submitted since the last review, the checklist will display a message indicating that there are No checklists available for review.

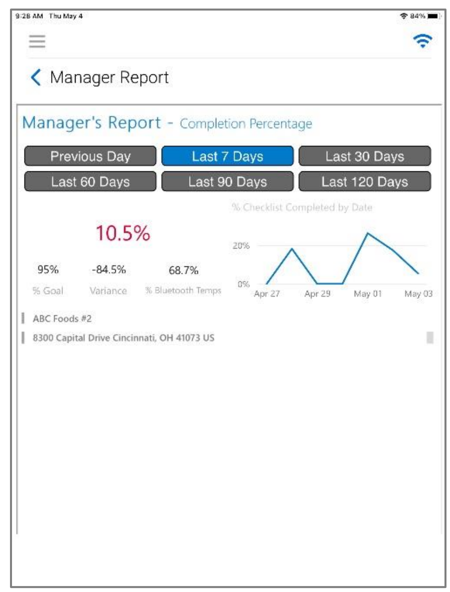




When you open the checklist, any checklists that have been submitted since the last review will be visible under their checklist Area. You can review the details of any submitted checklist simply by tapping on it.



Reports



The Reports page allows Managers to review reports and audit results. To simplify the process, reports have been filtered into their respective areas. Overall store reports can be found in the Store area.

Manager's Report

You will find information about checklists submitted for your store on the top of the reports tab. The target has been set by your corporate home office. These totals include the percentage of checklists that have been scheduled for your location that have been completed within the selected timeframe.

Location Report

The Location Report acts as a dashboard for multiple different reports and audits. Displayed in the colored circles are the last 3 months for all available reports. For more detailed information, tap on any of the circles to drill down.

Food Safety Audit

As a customer of Ecolab, you may receive Food Safety Audits as part of your program. Any Food Safety Audits completed in the last three months would show up on this report for managers to easily access and review.

HACCP Report

The HACCP report is a summary of checklists completed within the application. Types of information that can be found in the report include: Completion Percentage, Cold Holding Compliance, Hot Holding Compliance, Missed

Checklists, and Out of Compliance Response. These metrics can be viewed for the previous day, last 7 days, or last 30 days.

Yesterday Report

The Yesterday Report is a summary of the previous day's activities using the application. Types of information that can be found in the report include: Checklist Submission Compliance, Question Compliance, and status of the checklists (Complete or Expired).

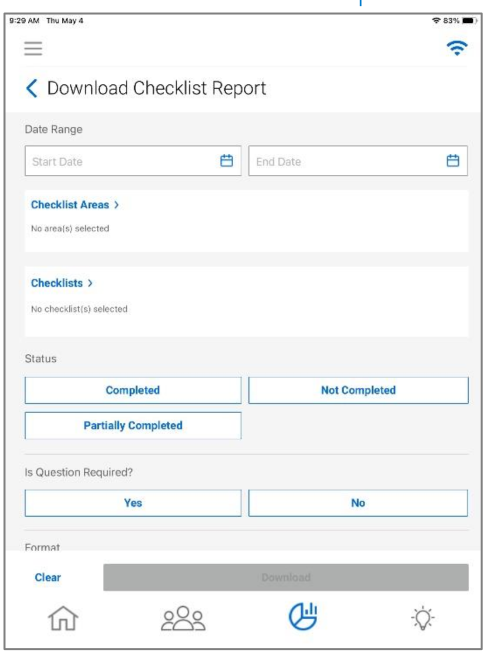
Daily Pending Checklist

The Daily Pending Checklist Report is a summary of the current day's activities using the application. Types of information that can be found in the report include: Number of Checklists remaining to be completed; Areas that contain non-completed Checklists; names of non-completed Checklists; and expiration times of non-completed checklists.

Remote Temperature Monitoring

If the optional the Remote Temperature Monitoring feature is enabled for your account, this report will be present and display the most recent measurement received for each of your sensors from your RTM provider. Users are also able to view a list of any alarms received for all or for individual sensors Today, Yesterday, over the prior 7-day period, or over the prior 30-day period.

Download Checklist Report



The Download Checklist Report allows users to download submitted checklist data for any period over the last six (6) months into either a CSV or PDF file. The file will be saved in the Downloads folder of their device. Users can filter the report data to be downloaded by Date Range; Checklist Area; Checklist Name; Completion Status; and whether the question was Required or Optional.

Enable Report(s) – View by Role

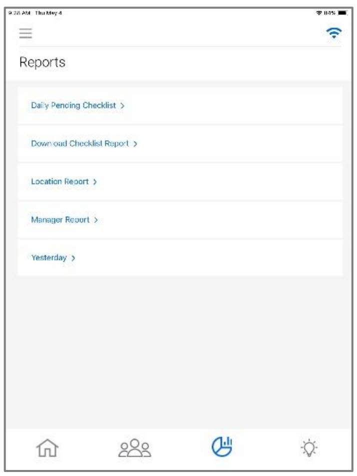
New permissions allow flexibility to select in-app reports by role. Mobile application users can have access to any report based on the specific role set by the brand. If the brand wishes to allow associate level users access to reporting, they now can do so.

- Remove access for specific reports from the reports tab for Managers
- Add specific reports to be visible for Associate users.

Current permissions for Managers are set to be the same as they see today. *Please contact your Ecolab representative if you would like to update permission for your users.*

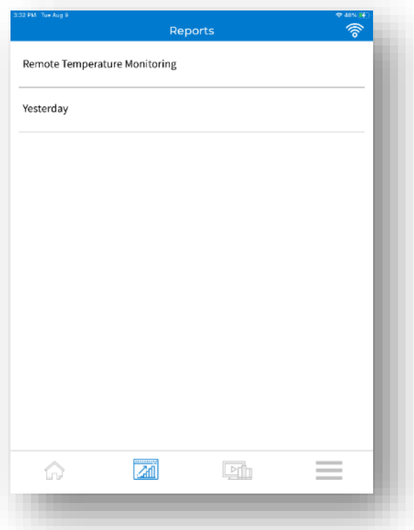
Manager Reports

(example with displayed reports)



Associate Reports

(example with reports added for Associate users)



User Management

Accessed from the Menu, User Management allows managers at a location to add new users, modify existing users, and deactivate users as needed. Additionally, passwords can be reset as needed for the user's setup in the application. You must log in with manager credentials to access the User Management screen.

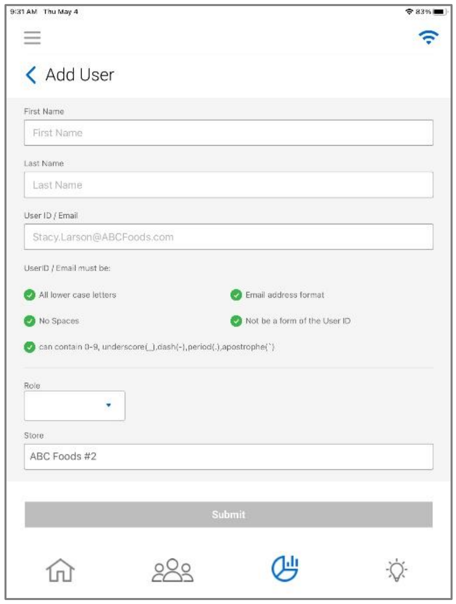
Add New User

1. Go to More tab (top left ellipsis)
2. Select User Management
3. Click on Add New
4. Fill out:
   a. First Name
   b. Last Name
   c. User ID – Must be in the form of an email (example@abc.com)

d. Role – Managers and associates can be setup.

e. Set password – For security reasons, new users should set their own passwords. The Password must contain an uppercase letter, a lowercase letter, a number, a symbol, at least 8 characters, and not be a form of the User ID.

5. Submit



Modify User

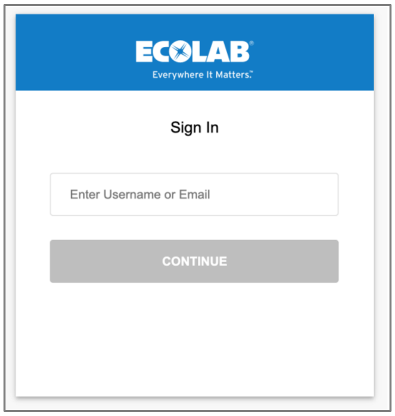
1. Go to More tab
2. Select User Management
3. Click on the User's name whose profile you wish to modify
4. Click Modify
5. Make any necessary changes including Reset Password, then press Save
6. To make a user inactive, simply reset the password to a new, unknown value.

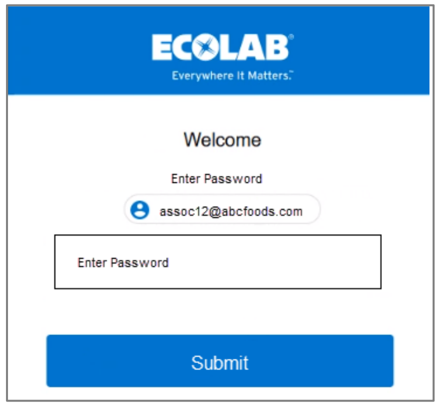
Ecolab Connect Users Only

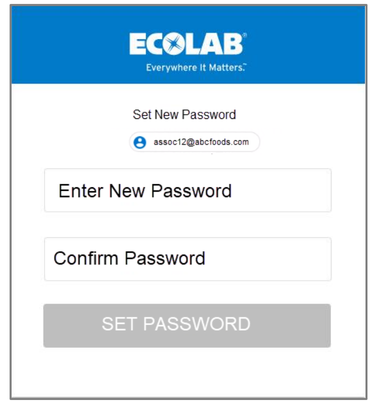
As users migrate to Ecolab's new customer portal, some additional user managements will become available

Delegated New User Creation

1. Users will be created using the existing process via the User Management functionality
2. Managers will set a Single Use Password for new users and provide to the new user
3. Upon first login, the new user will use the single use password and then be prompted to change password





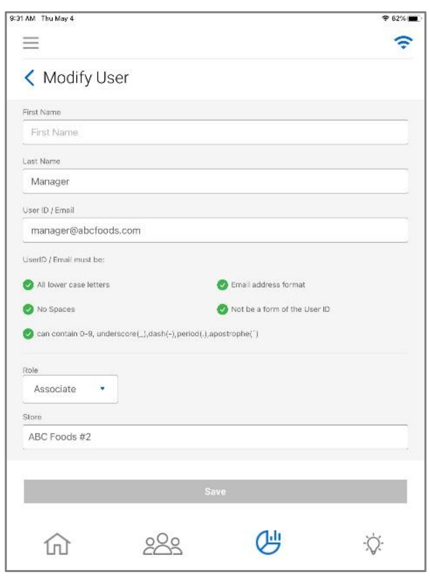


Delegated Forgot Password for Other Users Without Email Address

1. Manager will login to the mobile application
2. Go to More tab
3. Navigate to User Management
4. Select the User who forgot password
5. Manager selects "forgot password" and sets the single use password for the User
6. On new login, the User(s) will use the single use password to login and then be asked to create a new password

Self Service Forgot Password

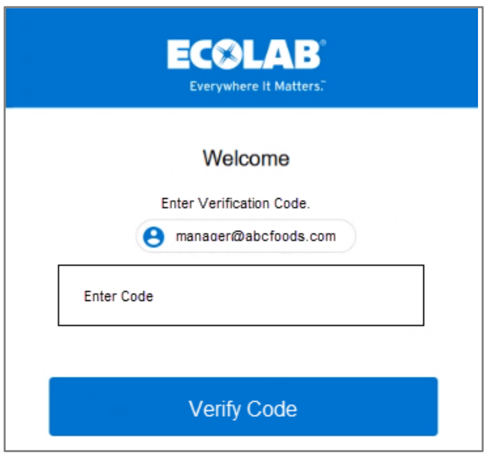
1. Go to More tab
2. Navigate to User Management
3. Select Forgot Your Password

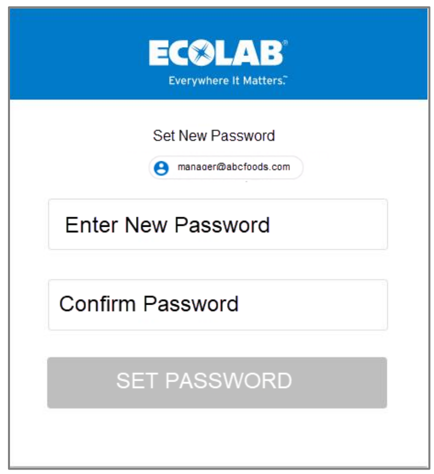


4. User enters their email address and selects "continue"

5. Click send Verification Code

6. User enters code that was sent to their email address
7. User sets new password



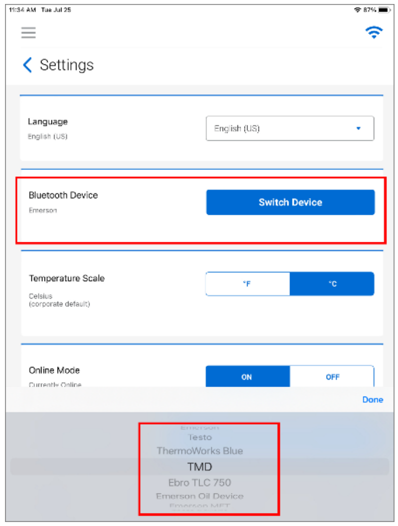


Settings

The Settings page can be accessed from the Menu. The Settings page allows users to adjust the Bluetooth Thermometer being used, change temperature scale, toggle between offline and online mode, change the language the application is presented, and change stores.

Bluetooth Device

Users can select which Bluetooth temperature device they would like to use for taking temperatures. While a corporate default is automatically selected, a user can change the device if more than one is being used in a location.



Thermometer Setting

Select Temperature Scale

1. Go to Menu
2. Select Settings
3. Tap in the Select Temperature Scale toggle box to select between Fahrenheit and Celsius

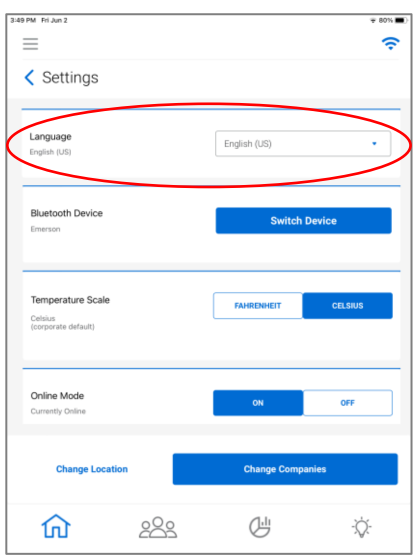
Online Mode

Users can now toggle between online and offline mode. In locations where users may not have consistent access to a connection, users can choose to work offline. Not all functionality is available when in offline mode. Reports, training, user management, and notifications all require Online mode to be enabled with a connection to properly function.

Language

Users can now change the language they prefer to use.

1. Go to Menu – log out / log in and change at entry
2. Select Settings
3. Tap in the Language drop down list box to select preferred language.



Change Stores

Changing stores provides users with access to different locations to change locations on a device. As these users travel from location to location, they can log in to that location to view checklist information, reporting, and that may promote an enhanced visit to a specific location.

To Change Stores on a Device:

1. Go to Menu
2. Select Settings
3. Click Change Location
4. Click Ok on Pop-up to log out of current location and return to log in page
5. Log In using credentials
6. Choose a store from the list or Enter a Store Number field and select Continue.

Time Zone Management

If a user attempts to login to a location and their device is ahead of the time zone assigned to the location, a page will appear showing the *store time zone* <u>and</u> the *device time zone*. If the device is ahead of the store, it could cause checklists to expire early.

Users are presented with two options:

1. Change device time zone which will navigate the user to Settings **or**
2. Continue without updating. This should only be used if the store assignment is incorrect, but the device time zone is correct. **Users should contact an administrator to correct the store alignment**. It may still expire checklists but will allow users to continue working.