

SOFTWARE

OpScope
Procedure Design & Execution

User Manual

Rev 1



Introduction

This guide describes how to use the OpScope. OpScope provides a procedure design and execution tool focused on reducing risk executing procedures using advanced mobile computing platforms on a cloud-based multi-user platform and mobile app. You can download the OpScope app from your app store to your mobile platform.

OpScope is another tool in the Kenexis Integrated Safety Suite (KISS) of software from Kenexis. Consequently, the first few sections will be about navigating the KISS platform in general. If you are new to KISS, I would suggest reading through the KISS manual first. Section 3 will begin the specifics about OpScope.

About Kenexis

Kenexis, an independent consulting engineering firm that provides technical safety services, performance-based fire and gas mapping, and risk analysis for industries that manage risks related to chemicals or stored energy.

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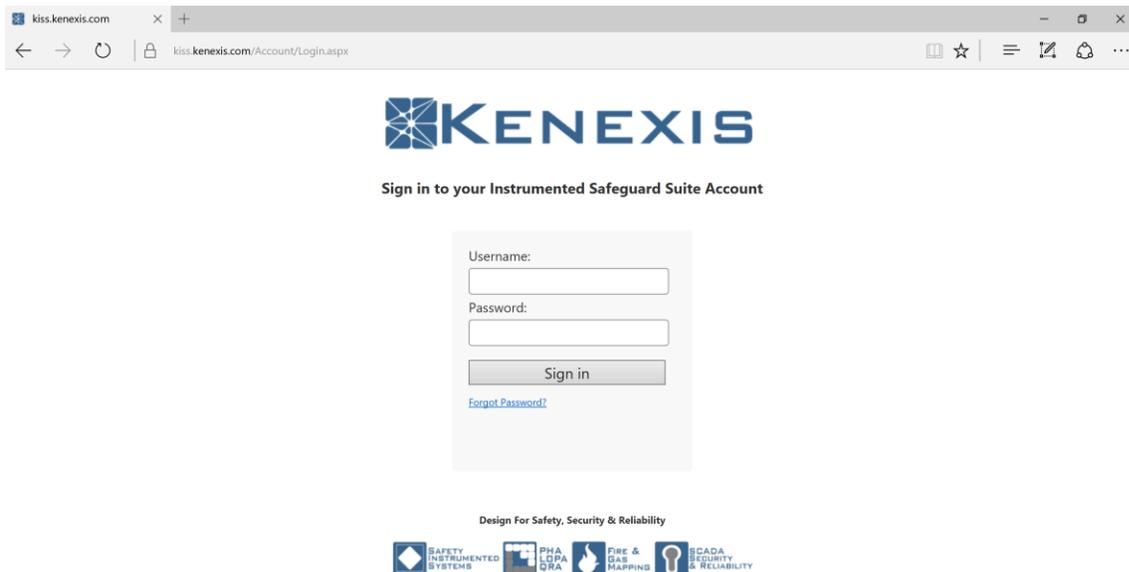
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Section 1 – Getting Started



1.1 Instructions for First Time Login

Welcome to OpScope, part of the Kenexis Instrumented Safeguard Suite (KISS). If you are new to the KISS you should have received a welcome package from support@kenexis.com via email with your login credentials. Once you have received this package, it means that your account has been configured and is ready to use. You can access your account by directing your browser to <https://kiss.kenexis.com>. This will navigate your browser to the KISS login page, shown below.



From here you can login using the login credentials provided in your ISS welcome email. If you’ve lost your temporary password or believe your welcome package may have been blocked by a corporate firewall or spam filter, it can be restoring by using the “Forgot Password?” link. If you’ve lost your username, please contact support@kenexis.com for assistance.

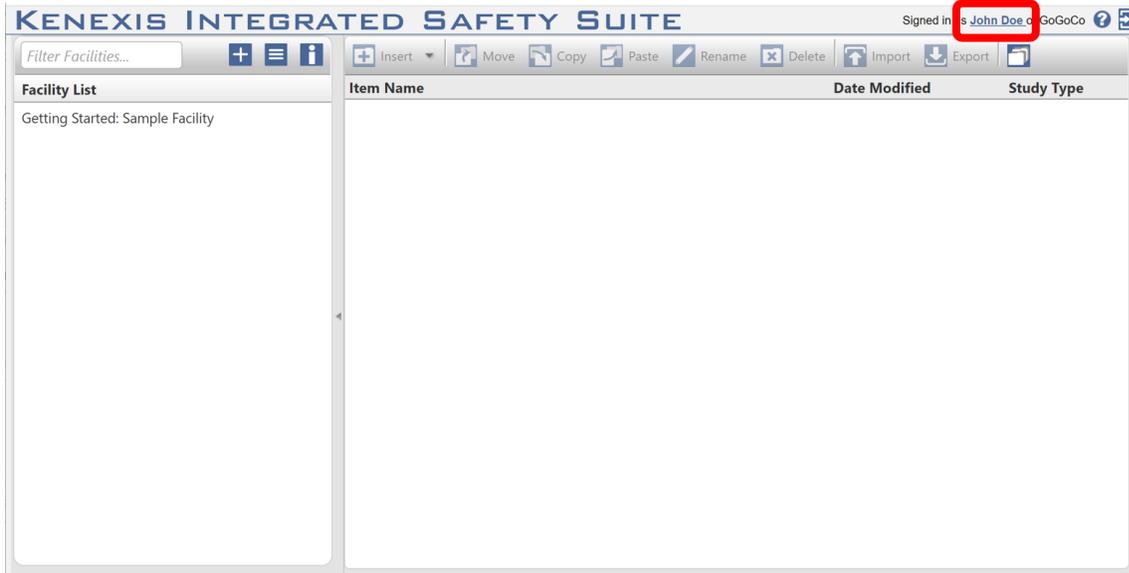
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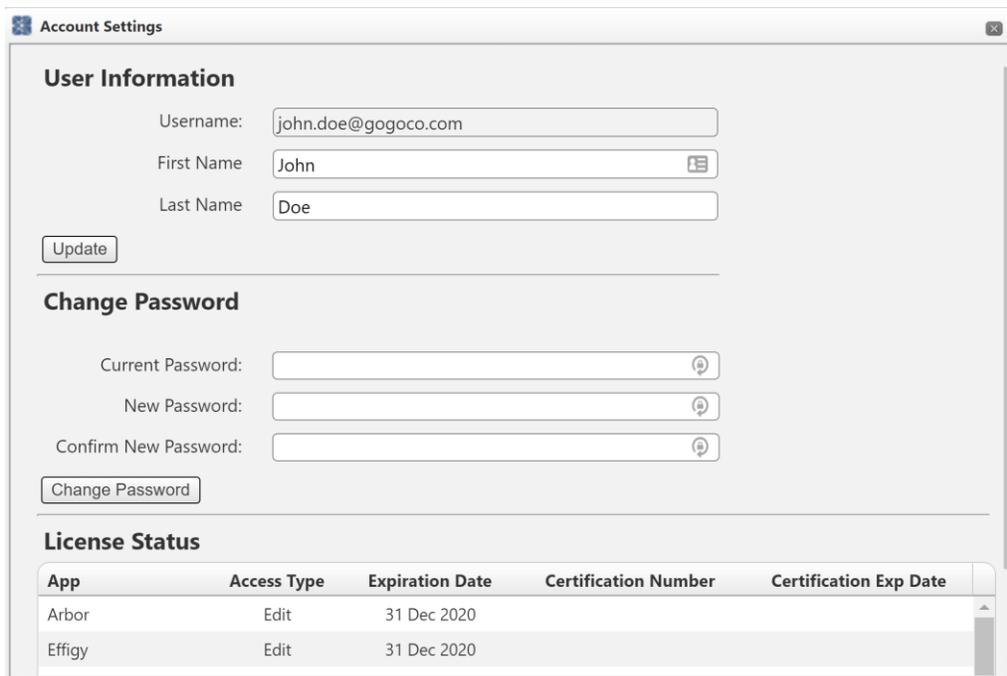
Getting Started

After Successful login, you should arrive at the Study Manger page.

From here, it is highly recommended that you reset your temporary password. You can reset your password by clicking on your name in the top right corner.



This will open the account settings window where you have the option to change your password and user information. This window also contains License Status information for each app including access type and expiration date.



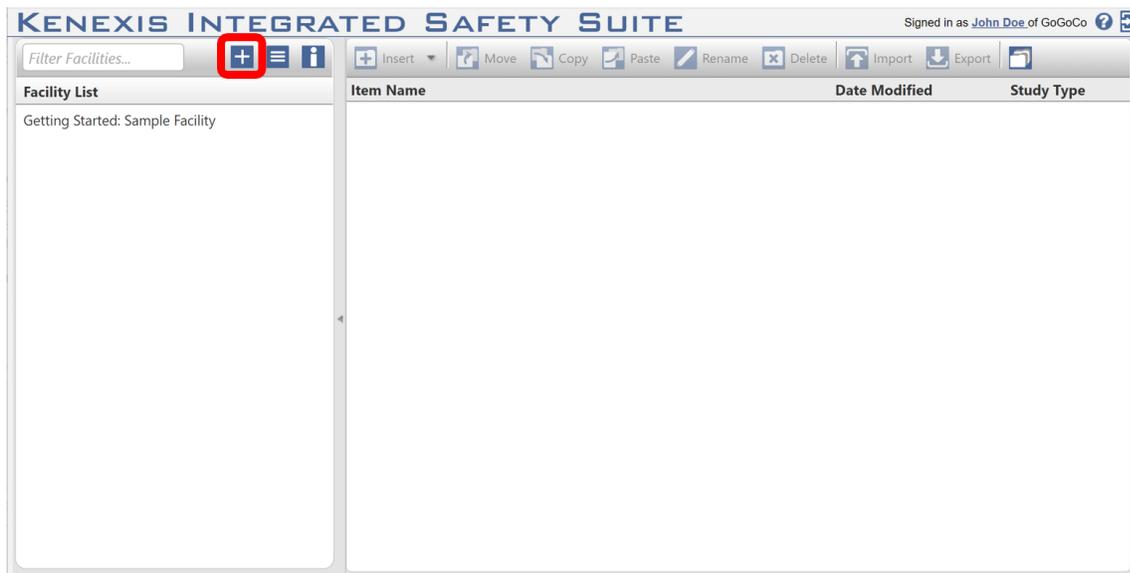
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1.2 Login Issues

This section describes some of the common causes and solutions for trouble with logging into the Kenexis Instrumented Safeguard Suite (KISS).

Issue	Trouble-Shooting
I forgot my password	Visit Kiss.Kenexis.com and click on the "Forgot Password?" link.
I forgot my username	Contact Support@Kenexis.com to restore your account
There are no studies on the Study Manager Page	If you are not able to view any facilities or studies on the Study Manager page it is because you do not have access to any study information. Depending on your roles within your company you may have privileges to create a new facility by clicking on the Add Facility button (shown below).



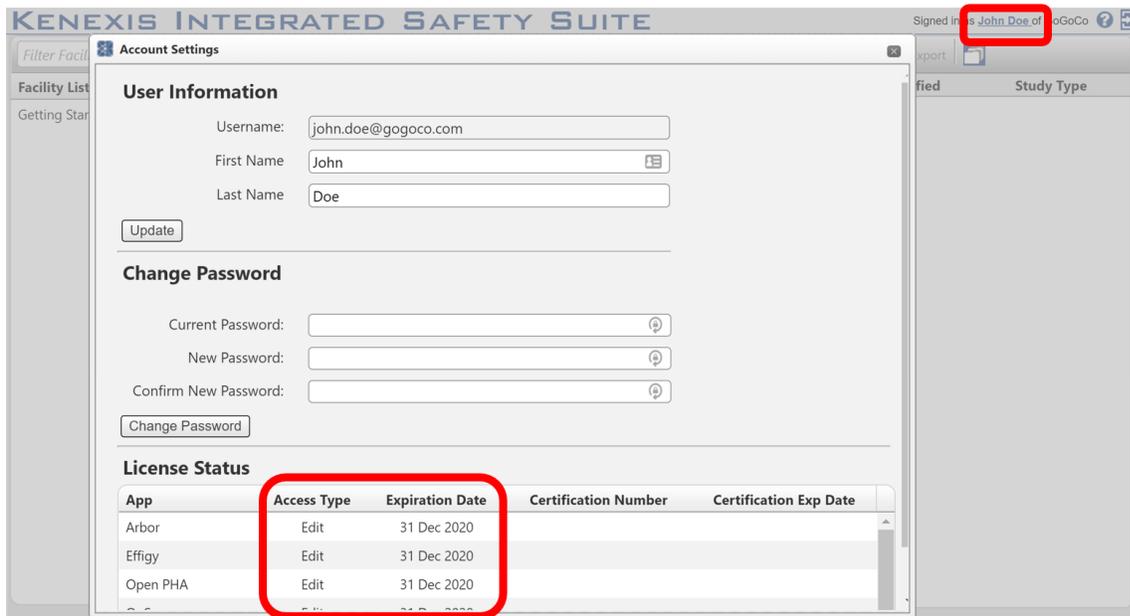
If you are a first time user and unfamiliar with the data structure you may want to consider following the "Creating Your First Study" tutorial.

Alternatively, if your account has been assigned read-only permissions you will need to contact your project manager/company administrator to grant you access to the desired studies. You can view your account permissions on your account settings window, which is accessed by clicking on your name in the top right corner.

Section 1 – Getting Started



Getting Started



1.3 Other Resources

In addition to the information provided in this user manual, help and support for use of the KISS Manager can also be obtained from the following resources:

- Live Support from Kenexis Staff. Support requests can be submitted to Kenexis staff via the Kenexis support system, which can be accessed from <https://www.kenexis.com/support>.

Section 2 – Interface



2.1 Navigation



The navigation toolbar serves as the primary means for navigating the KISS interface.

We will assume you understand the navigation and use of the KISS toolbar and focus on OpScope. The OpScope toolbar functions are described below:

Button	Description
	Add New Facility This button allows you to create a new facility. The creator of a facility is the default owner of the facility. Once created the owner can assign access to other users as described in Section 3.1.2.
	Facility Properties View the properties of the facility and assign user access as described in Section 3.1.2.
	Facility Dashboard View dashboard information for studies in the facility. Dashboards provide a graphical aggregation of data for certain applications including Open PHA and Vertigo.
	Insert a new folder or study.
	Move a folder or study.
	Copy a study. Is only active for studies.
	Paste a folder or study. Is only active after using “Move” or “Copy”.

Section 2 – Interface



interface

Button	Description
 Rename	Rename a folder or study.
 Delete	Delete a folder or study.
 Import	Import a study. Study must be a compatible file extension and formatted correctly. Can import a single file or a zip folder, dependent upon application being imported. Additional details on importing and exporting can be found in the user manual for each KISS application.
 Export	The export button can be used to export study data. Formats and file extensions are dependent on the study type being exported. Exported files can later be imported into KISS using the import described above.
	Library Manager Launch the library manager. Libraries are described in Section 3.3.
	Organization Settings Manage settings for your company or organization including, security & privacy settings and user management. Organization management is described in Section 3.4

Section 3 – Using OpScope



3.1 Creating Facilities

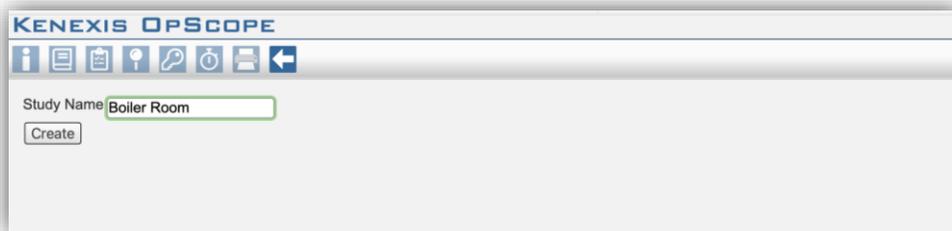
To build your first procedure, you start by creating a facility. To create a facility, click on to add icon above the Facility List and give your facility a name. In the example below we named our facility “Main Building”.



Next you will insert Insert an OpScope area, machine, or process that is appropriate for the procedures that you are going to enter into the system.



Enter a name for the area, machine, or process in the field shown below. I named mine “Boiler Room”.

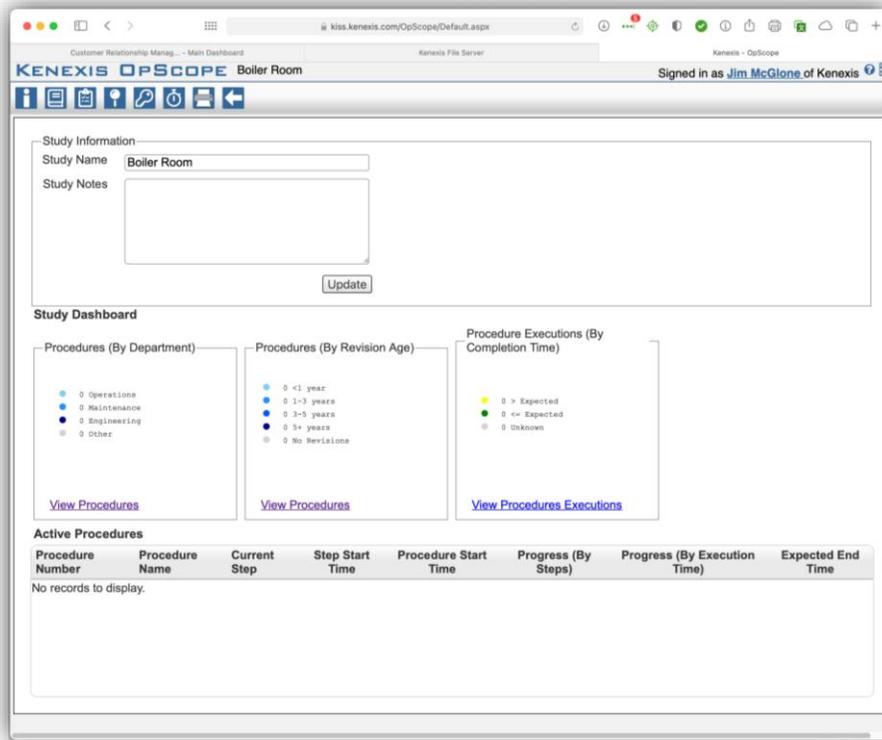


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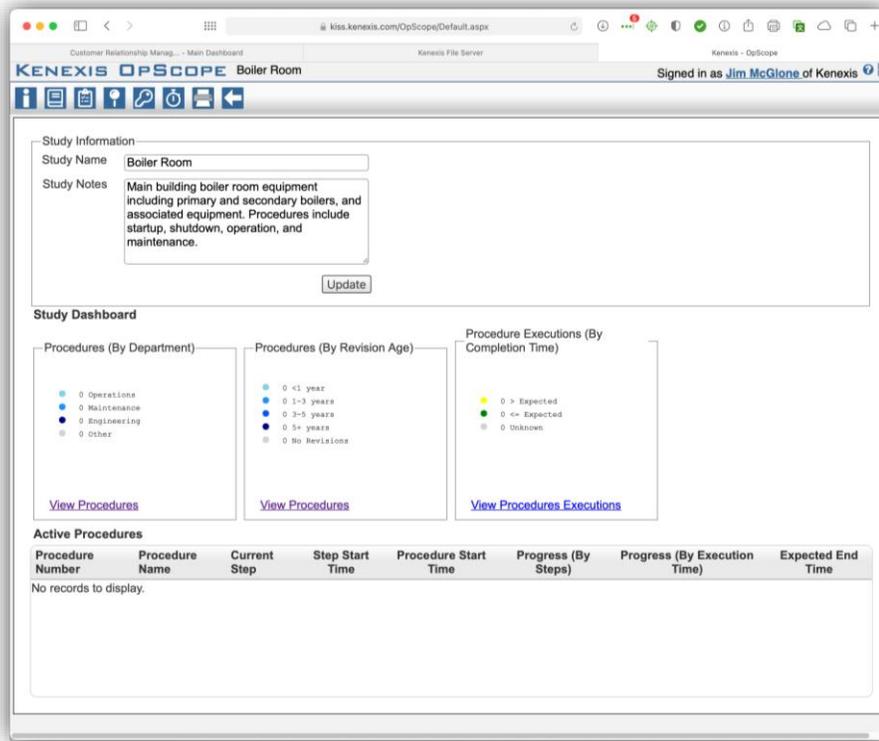
3.2 Facility Dashboard

Now the main window is the dashboard for the procedures in this area. You can create procedures for everything appropriate for the “Boiler Room” in this case.



Now it might be appropriate to enter Notes about the Boiler Room and its procedures.

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3.3 Toolbar

Now we are inside OpScope instead of KISS functions and the tool bar changed as listed below.

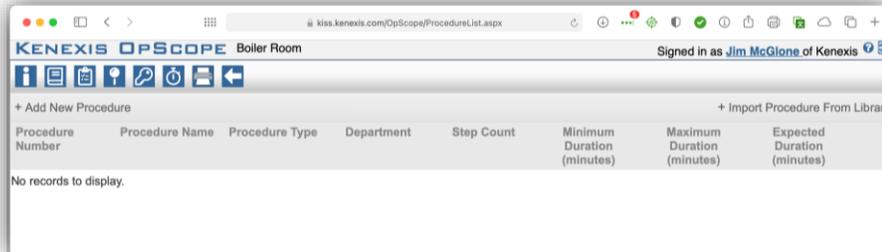
	Overview
	Procedure List
	Manage Procedure Steps
	Location List
	Permissive List
	Procedure Execution List
	Generate Report
	Back to Study List

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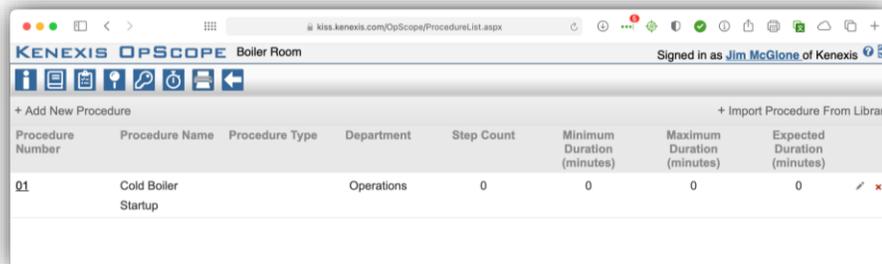
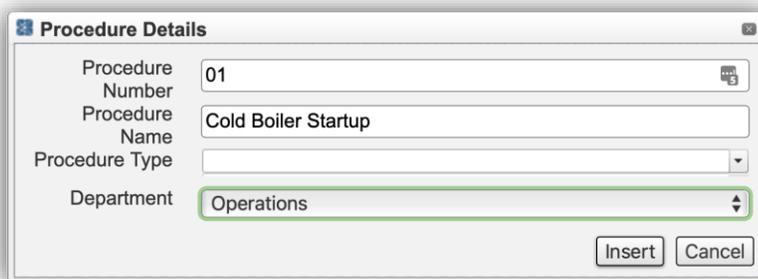
3.4 Procedure Creation

It is time to enter our first Procedure by clicking on the Procedure List  icon.



No procedures are present in the above image because we have not created on yet.

We will enter a procedure by clicking on **+ Add New Procedure** . A small popup window will appear for you to enter the Number for the procedure you are creating, the Name, and Department the procedure is assigned.

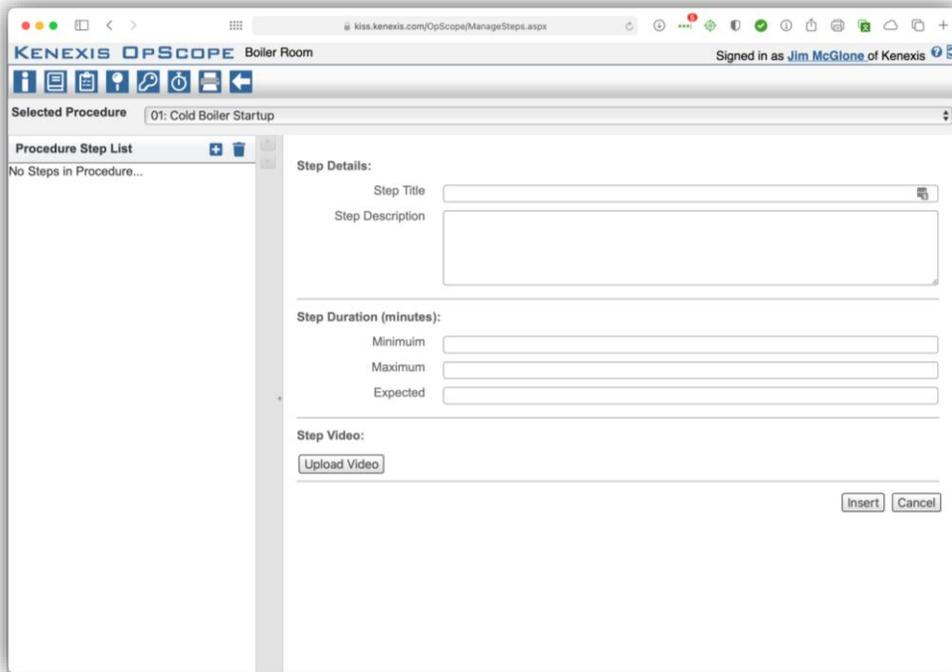


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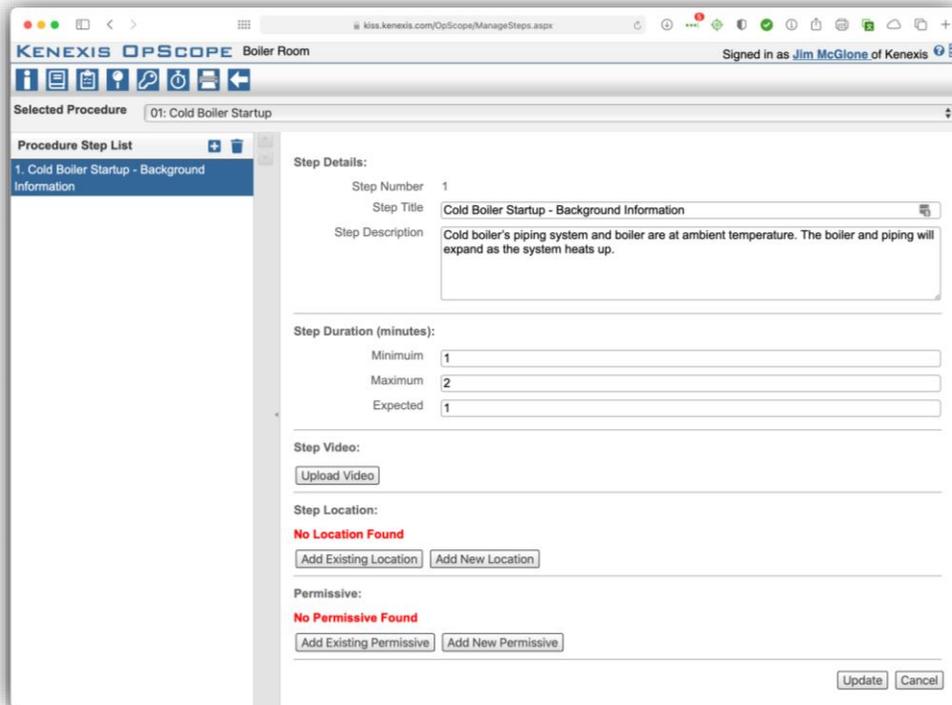
3.5 Creating Procedure Steps

Now we need to add steps to our first procedure by clicking on the Edit icon   to the right on the procedure or the Manage Procedure Steps  icon.



Now we have the main screen open for entering a procedure step. You can add a Step Title, Description, Duration, and upload a video if you have one at this point. If you do not have a video, you can add a video later in the field using the OpScope app on your mobile device.

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Additional information about the procedure can be entered throughout the steps. Here we used the first step to describe what is expected. Once we clicked the Update button, red highlighted content appears for additional information you may want to enter for this procedure.

Step Location might be difficult to enter from the office so we will leave that blank until the we are in the boiler room and can record the exact GPS location from the mobile device using the OpScope app. Then the next time someone performs this procedure it will show their actual location in relationship to the recorded location to see if there is a discrepancy.

There are new buttons on the main screen now for Add Existing or Add New. These work exactly as you might expect. If you have already recorded the location once, you can select it from a list. If not, you can create a new one.

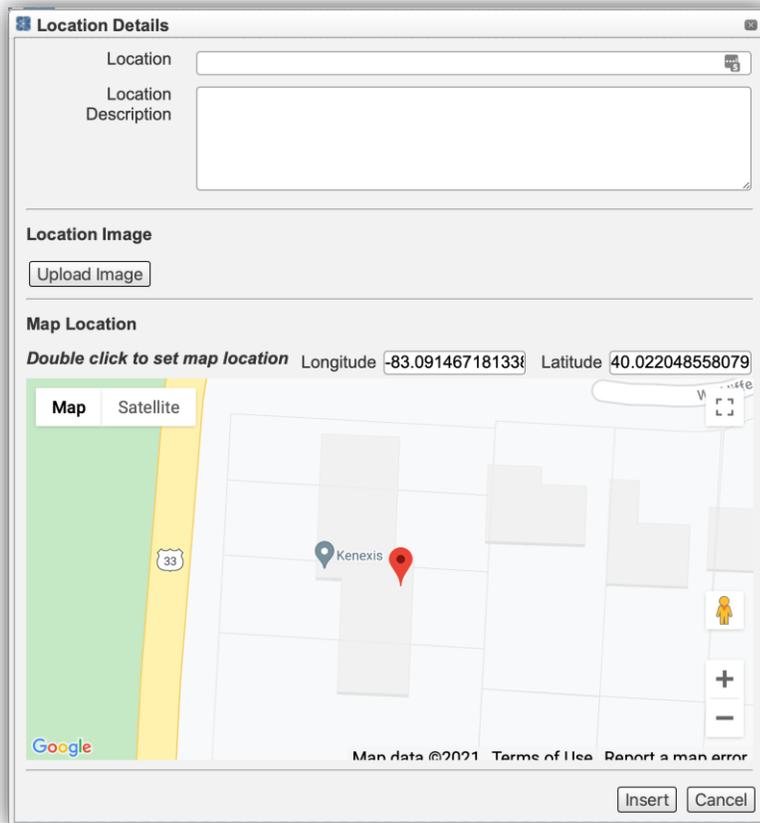


Clicking on Add New Location pulls up your mapping tool and if you zoom in will show you your location on the map.

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The grey location icon is where the GPS locator in my device thinks I am at; however, the main boiler room is actually in the back of the building and not where my desk is located as I enter this procedure. So, I clicked on the map in the correct location to record the correct location (red location icon) of the boiler room. You can also do this in the field using the OpScope app the next time you get to this step.

Notice that there is also an Upload Image button for the Location Image section. If you do not already have an image, you can take a picture with your mobile device when you are there next time.

I clicked on Insert and the step screen added more red text that states “Click Update or view changes” as shown below.

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Step Details:

Step Number 1

Step Title

Step Description

Step Duration (minutes):

Minimum

Maximum

Expected

Step Video:

Step Location:

Location Updated. Click Update to view changes.

Permissive:

No Permissive Found

Clicking on Update, the screen changes to record the location information and adds a section for a “Require QR Code Scan? ” and a check box. This will generate a QR code that you can print or have embossed on a permanent tag for the location. This function works a lot like the old key box guards used when they made rounds to ensure they were in the right locations.

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Step Details:

Step Number 1

Step Title

Step Description

Step Duration (minutes):

Minimum

Maximum

Expected

Step Video:

Step Location:

Location Main Building Boiler Room

Location Description

Longitude -83.0914671813388

Latitude 40.0220485580796

Has Image? No

Require QR Code Scan?

Permissive:

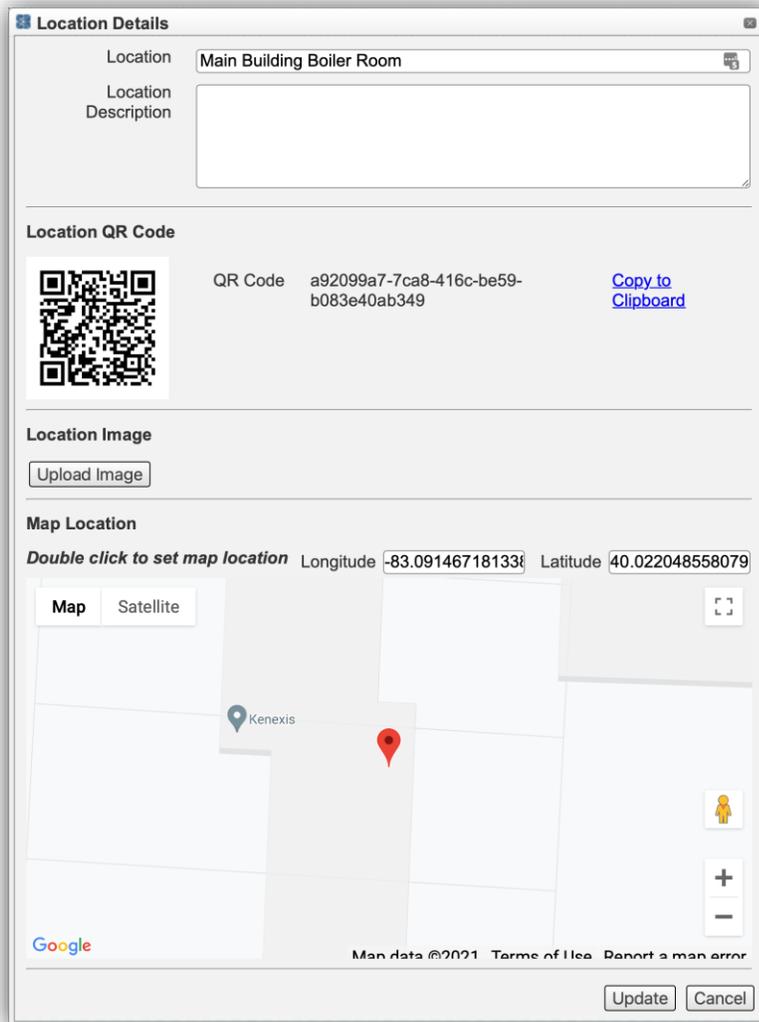
No Permissive Found

I checked the Require QR Code Scan and used the Edit Location to view the new QR code for that GPS location as shown in the image below.

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The QR Code image can be downloaded and saved from here by alternate mouse click and selection. The QR Code is actually the alphanumeric that can also just be copied to clipboard and pasted into you QR Code generator or labeling system.

Now when the operator performing the procedure arrives in the main building boiler room, they will be required to scan the QR Code to verify they are in the right area before they can advance to the next step in the procedure.

I also added another permissive to check the boiler temperature before proceeding shown below.

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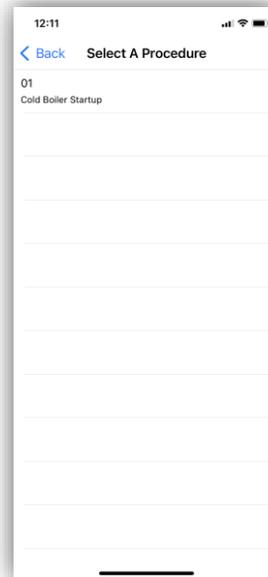
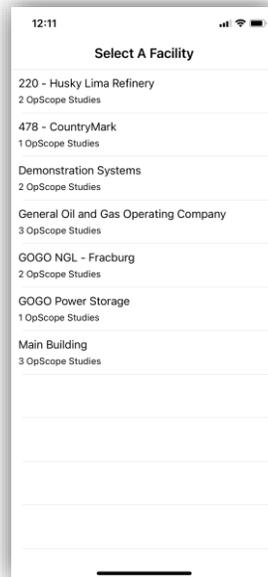
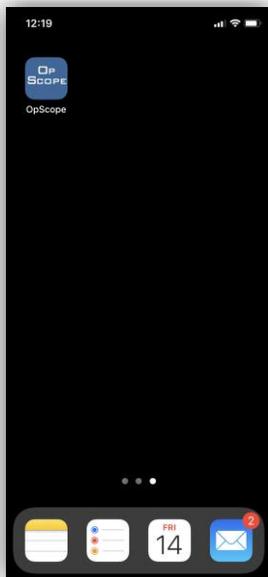


Permissive:	
Permissive	Check Boiler Temperature
Description	Is the boiler at or near ambient temperature. Boiler must be at ambient and below 200 degrees F to perform this procedure.
<input type="button" value="Edit Permissive"/>	<input type="button" value="Clear Permissive"/>
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

3.6 Installing and Using the App

Before we go to the next step, let's test the procedure step we just entered by opening it in the OpScope app on our mobile device. Once you have installed the app on your mobile device, you will be prompted for your KISS username and password. From this point forward when you launch the app, it will log you into the KISS servers automatically.

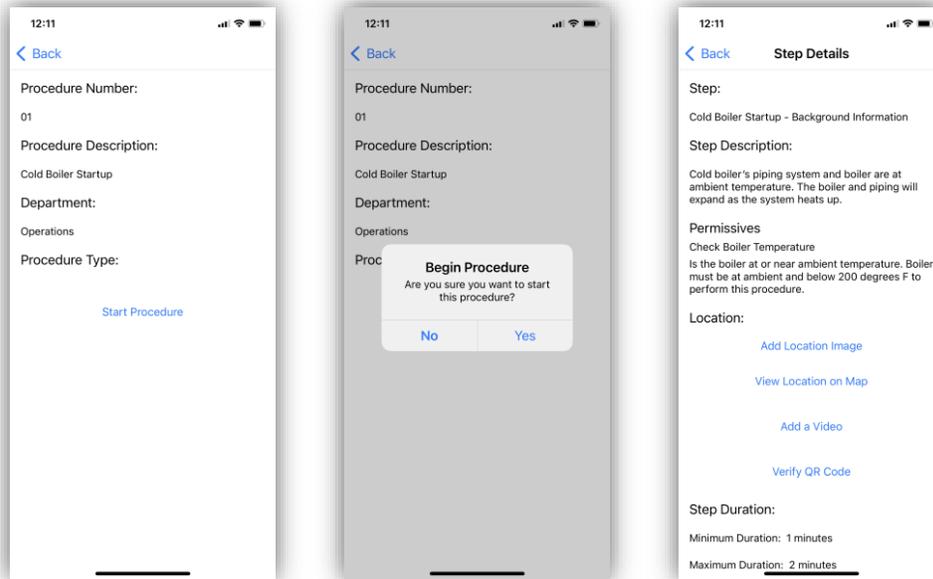
Once the app is open, you will be asked to select a facility from the list. Our procedure is in the Main Building facility at the bottom of my list of facilities. Next you are asked to pick a procedure. Since we only have one at this point in our Main Building facility, we will choose it.



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Now we have opened the procedure we just created. It is 01 Cold Boiler Startup. Clicking on Start Procedure will prompt the user to make sure they want to start the procedure. Click Yes and the procedure starts at the first step and shows the details of the first step.



Notice in the image to the right above, that the first step has Add and View links in blue. Since we created a QR Code for the location and marked the location on the map, those links are View. When they say ADD, you can add them during the procedure in the field. By clicking on the Add Location Image, you can snap a picture on our mobile device of the location and the OpScope app will add it to the procedure on the KISS servers. The same this is true for the Add a Video link.

To add a video, simply click the Add a Video link and follow the directions. OpScope knows what procedure step you are in so it will know where to put the video when you are done recording.

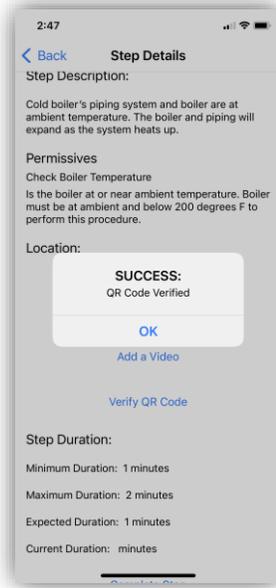
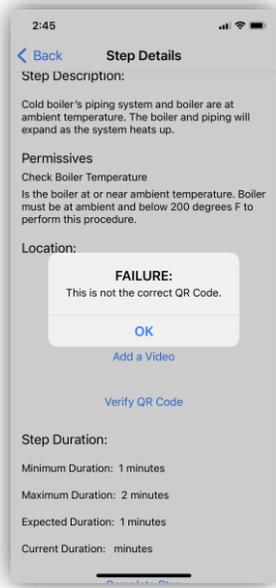
This step also has a Verify QR Code link that is necessary to complete this step. Once you click on the Verify QR Code link, the mobile device will ask for permission to access your camera and once granted, will display the camera with a red line across the center to guide you for reading the QR code. Place the red line in the image directly across the QR code to read it.

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If you read the wrong QR code, you will get the message on the left. If you read the correct QR code, you will get the message on the right. Now you mark the step as complete and move to the next step which we have not created yet so OpScope marks the Procedure Complete.

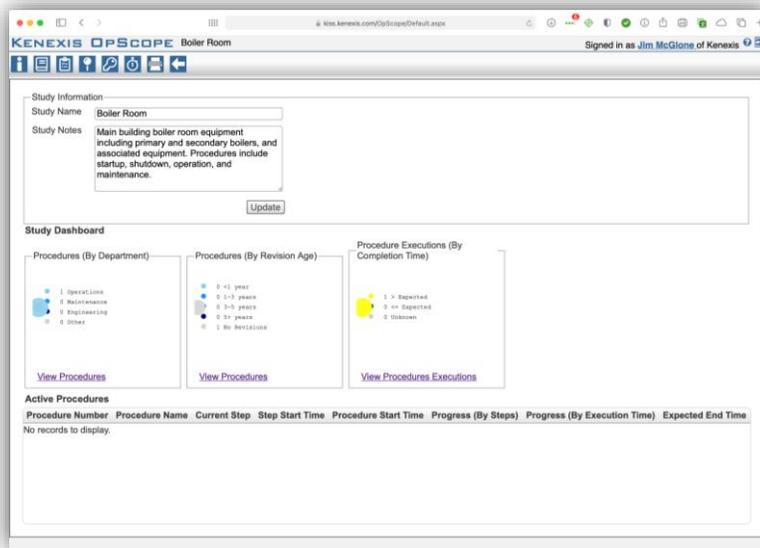


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3.7 Dashboard

If we go back to OpScope in our browser, the Dashboard will show you that a procedure was completed in the Procedure Executions by Completion Time window on the right middle of the dashboard.



If you click on the View Procedure Executions link in the bottom of that window, you can when the procedure started and finished compared to the expected time.



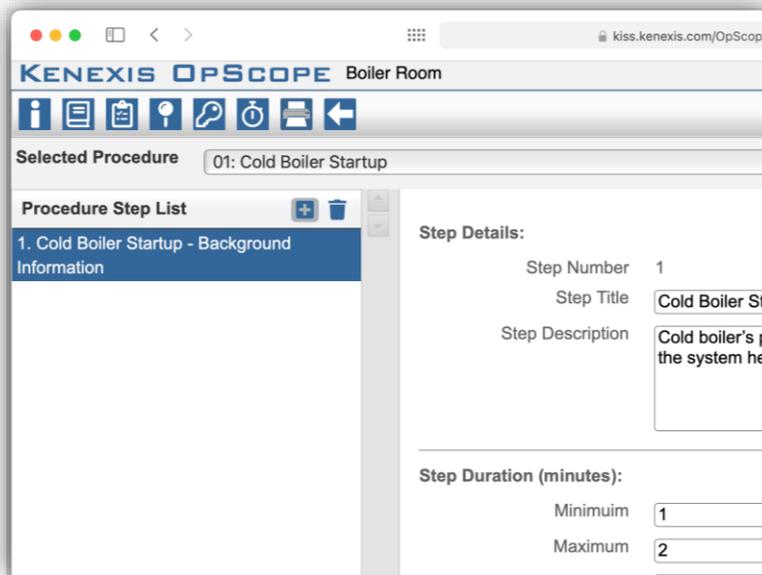
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3.8 Editing Procedures

Next, we will add a couple more steps to the existing procedure and revise it.

Open the procedure up in your browser so you can see the step list and click on the  in the Procedure Step List column to add another step.



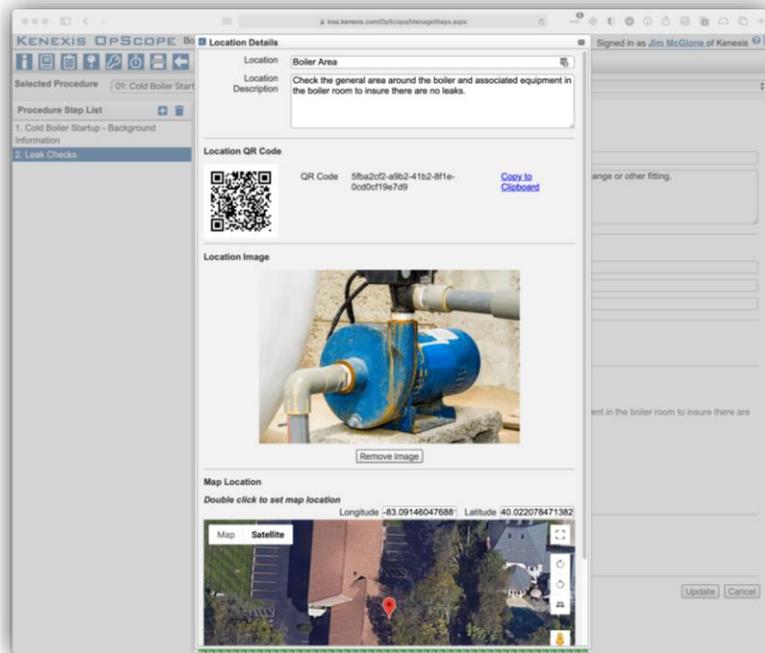
In the next step we are to check for leaks. We chose to put in an example picture of what a leak might look like in the location section.

We do not have a specific permissive for this step so to operator can move on to the next step which we will enter.

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Again, using the  icon, add another step to check fuel pressure at the main regulator. Fuel pressure should be between 80 to 130 psi. We want to ensure they check the correct gauge because someone got it wrong in the past and it caused significant problems.

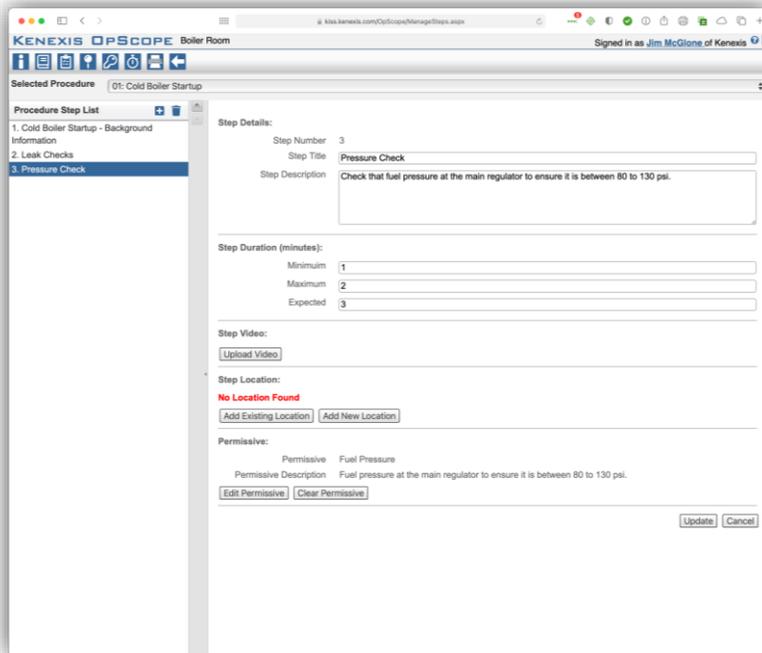
We do not have all the data necessary to complete this step entirely, so we are going to enter what we know and let the operator complete the step in the field on a mobile device.

We entered the Pressure Check step including a Description and Permissive information as shown below.

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3.9 Editing a Procedure on a Mobile Device

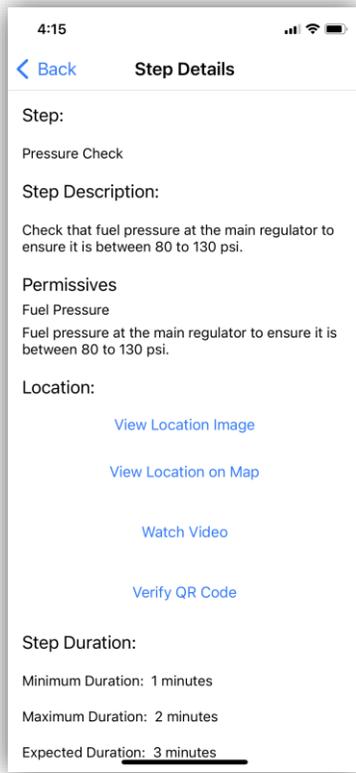
Exit the procedure in the browser and open it on the mobile device in the field. When you get to the step you just entered, record a video by clicking on Add a Video and store the location by clicking on Add a Location and double clicking on the map in the correct location when you are at the pressure gauge. This is designed to allow significant distance between the gauge and the equipment if necessary.

Once you have done this, then next time you execute the procedure the step will look like the image on the left and the video will be available to watch.

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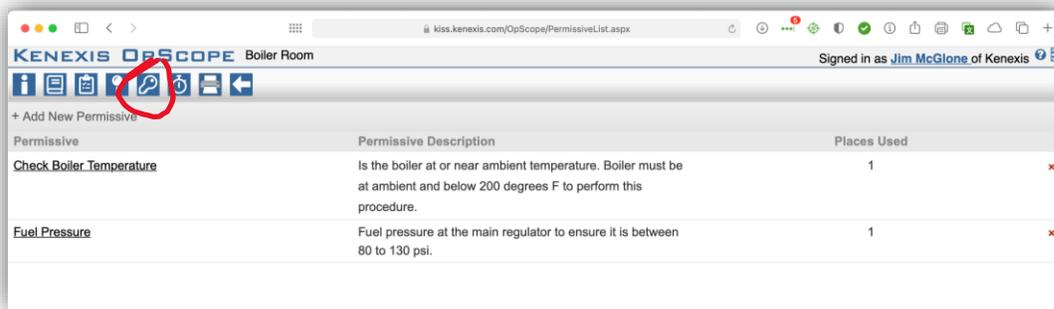


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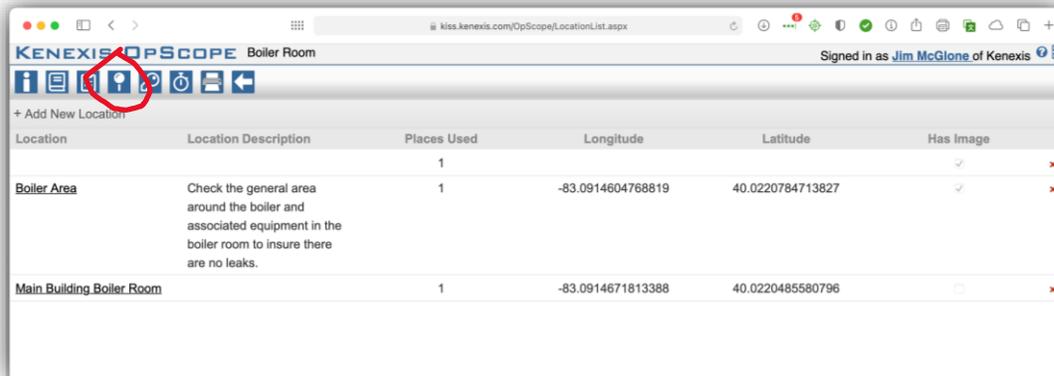


3.10 Additional Information

Once you have entered a few steps, you can go to the Location List to see how locations are stored. You may find it easier to just enter all of your locations this way and just reference them in the procedure steps later.



Same thing may be true about the Permissive tab.



And now we can see the Procedure Execution History.

