

UDIO TRAINING

OPERATIONS MODULE

Welcome to the training guide for the operations module.

In this manual, we'll walk you through how to set up and use the operations module, which currently includes the pool test log.

The training guide provides step-by-step instructions as well as visual aids so you can learn at your own pace and refer back to any section as and when you need to.

If you have any questions about the guide or would like to learn more about a certain feature or function, please send us an email at support@udiosystems.com.

To browse our other manuals, please visit our training page.

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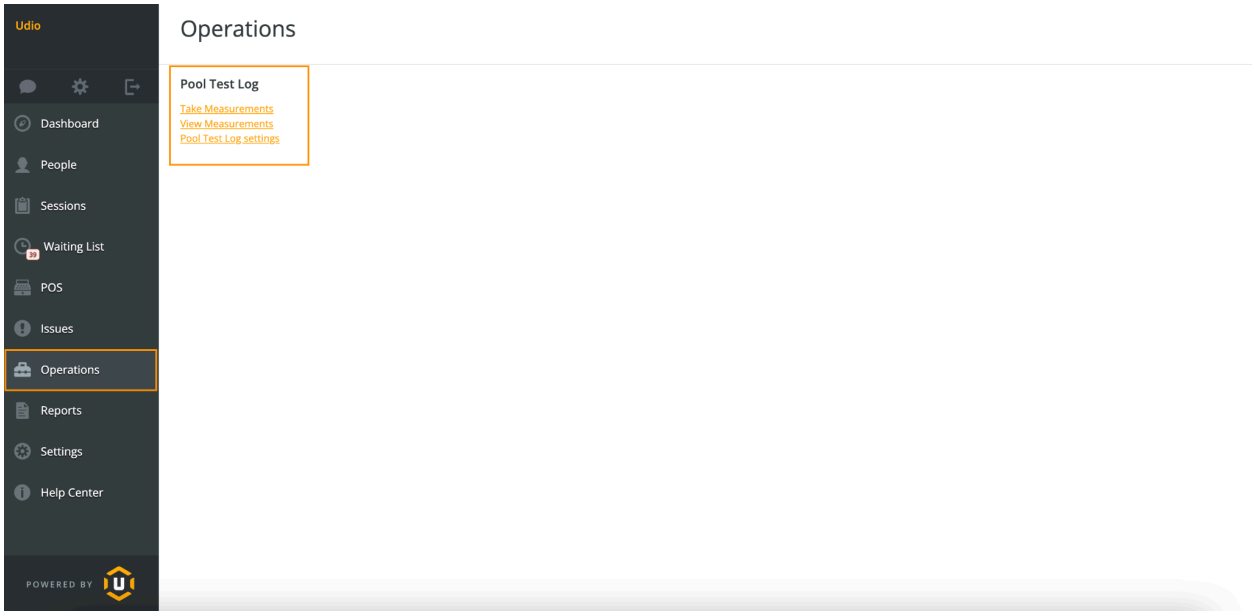
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1. Introduction

There is a new section in the side menu - **Operations -** and an associated permission for the section to appear.

The section is similar in appearance to **Reports** and **Settings.** At the moment, there's only one available module in the Operations tab - **Pool Test Log.**



2. Pool Test Log

The pool test log allows you to record swimming pool measurements.

Note: the pool test log must be enabled by a member of Udio - please email support@udiosystems.com if you would like us to switch the module on. You can set this up in your Sandbox first by updating your permissions - ***we strongly recommend doing so*** *before requesting Udio to enable it in your live environment.*

2.1 Parameters

You can create parameters to measure (e.g. *'pH level'*) and set up schedules for the times and days measurements need recording for each separate swimming pool at your facility/facilities.

Parameters can either be 'measured' or 'calculated'. Measured parameters are taken by the user and the value is simply recorded in Udio. Calculated parameters use two other measured parameters to calculate their value. For example, 'DPD1' and 'DPD3' might be measured parameters, but a third parameter, 'GAP', may be calculated by subtracting 'DPD1' from 'DPD3'. Calculated parameters will not be shown in forms when creating or editing measurements. Udio will perform this calculation automatically and display the result anywhere the measurement is displayed.

Udio will raise an issue if a measurement has not been recorded within one hour of its scheduled time. If that measurement is subsequently recorded, the issue will be resolved automatically.

2.2 Swimming pool limits

You can create swimming pool limits to identify the high or low boundaries a parameter should usually fall within for a swimming pool. You can also choose to raise an issue when a parameter value is invalid, i.e. when it is not a number.

When a parameter's value falls outside these boundaries (or is invalid), Udio will raise an issue. If the value is edited and then falls within any defined boundaries, the issue will be resolved automatically.

2.3 Default parameter values

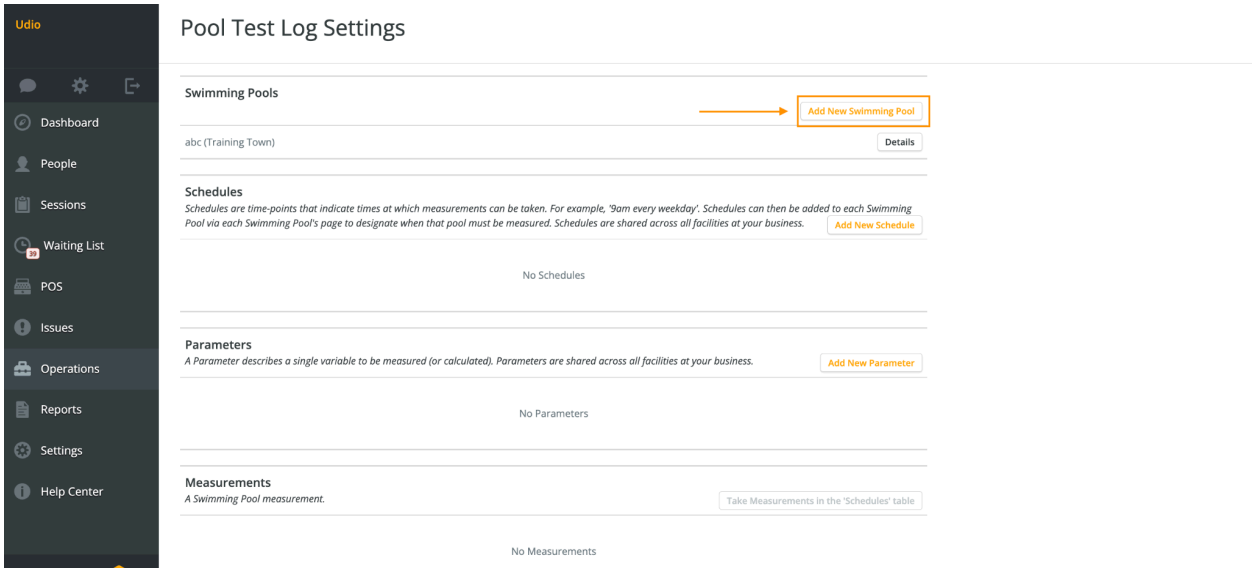
For convenience, you can create default parameter values for each swimming pool. When taking a measurement for that pool, any values that have defaults set will be

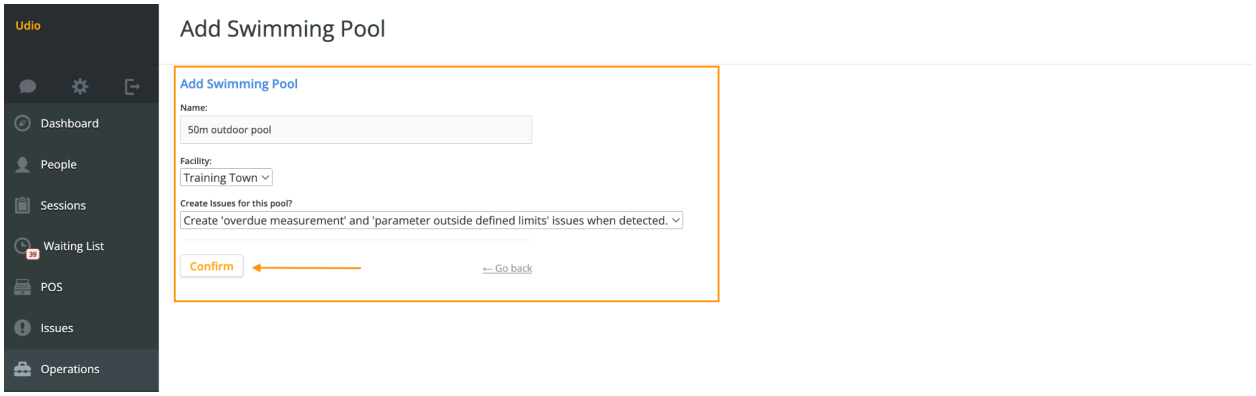
auto-filled in the *'Take Measurement'* field (note: you can still edit these when recording the measurement). For example, if a certain parameter is nearly always the same (e.g. '*pH level*' is always 7.5), simply create a default parameter value in the relevant swimming pool and the value 7.5 will be auto-filled for the *'pH level'* field in the *'Take Measurement'* form.

3. Pool Test Log Setup

3.1 Add a new pool

- Under *'Pool Test Log settings',* click *'Add New Swimming Pool'*
- Name your pool (e.g. '50m outdoor pool'), select facility, create issues and *'Confirm'*

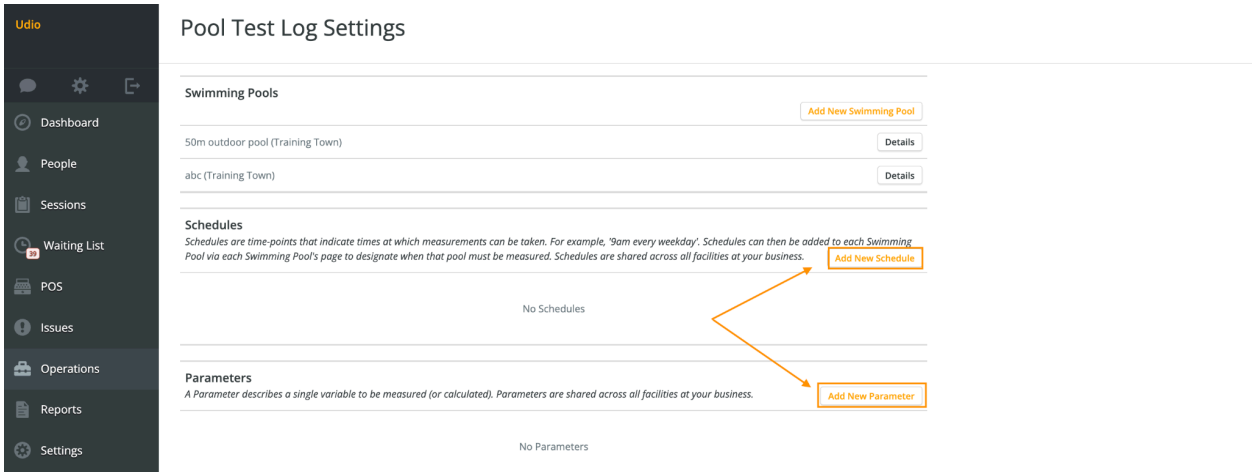


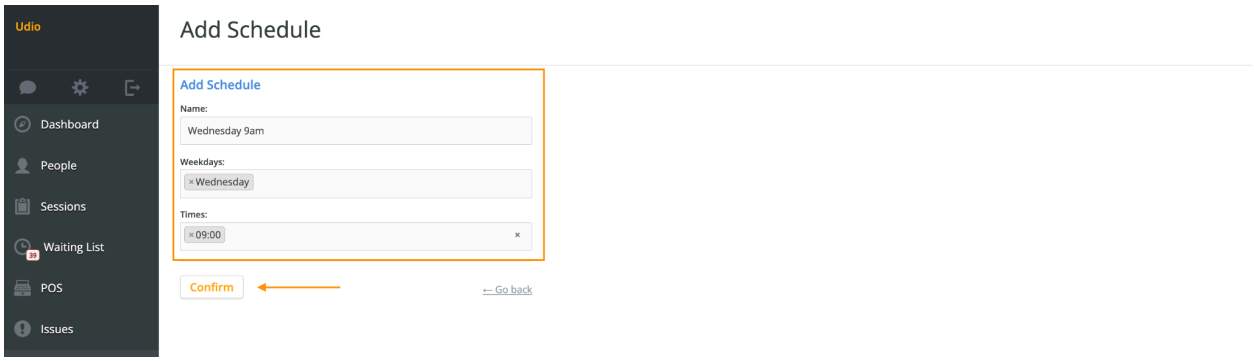


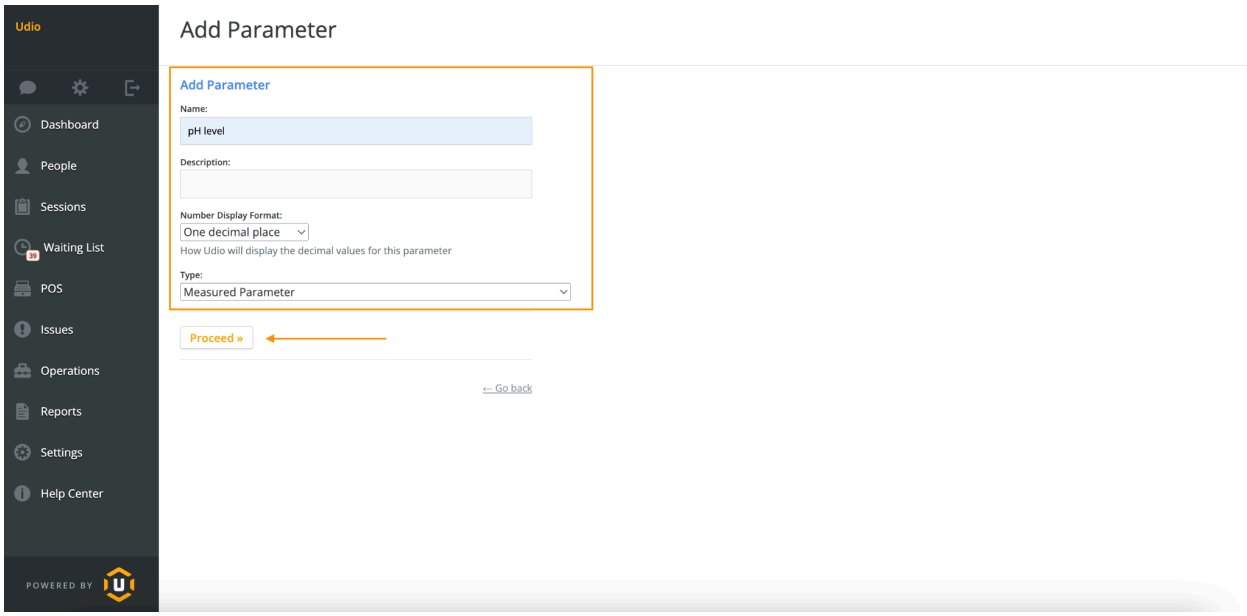
3.2 Create parameters and schedules

Parameters and schedules are shared across all facilities at your account and assigned to each particular swimming pool.

- From the *'Pool Test Log settings'* page, click *'Add New Schedule'*
- Add a name, weekday(s) and time(s) to indicate when you want measures to be taken
- Next, click *'Add New Parameter'* and add a name, optional description, number display format and type (measured or calculated)
- Repeat the steps above until all your schedules and parameters are added





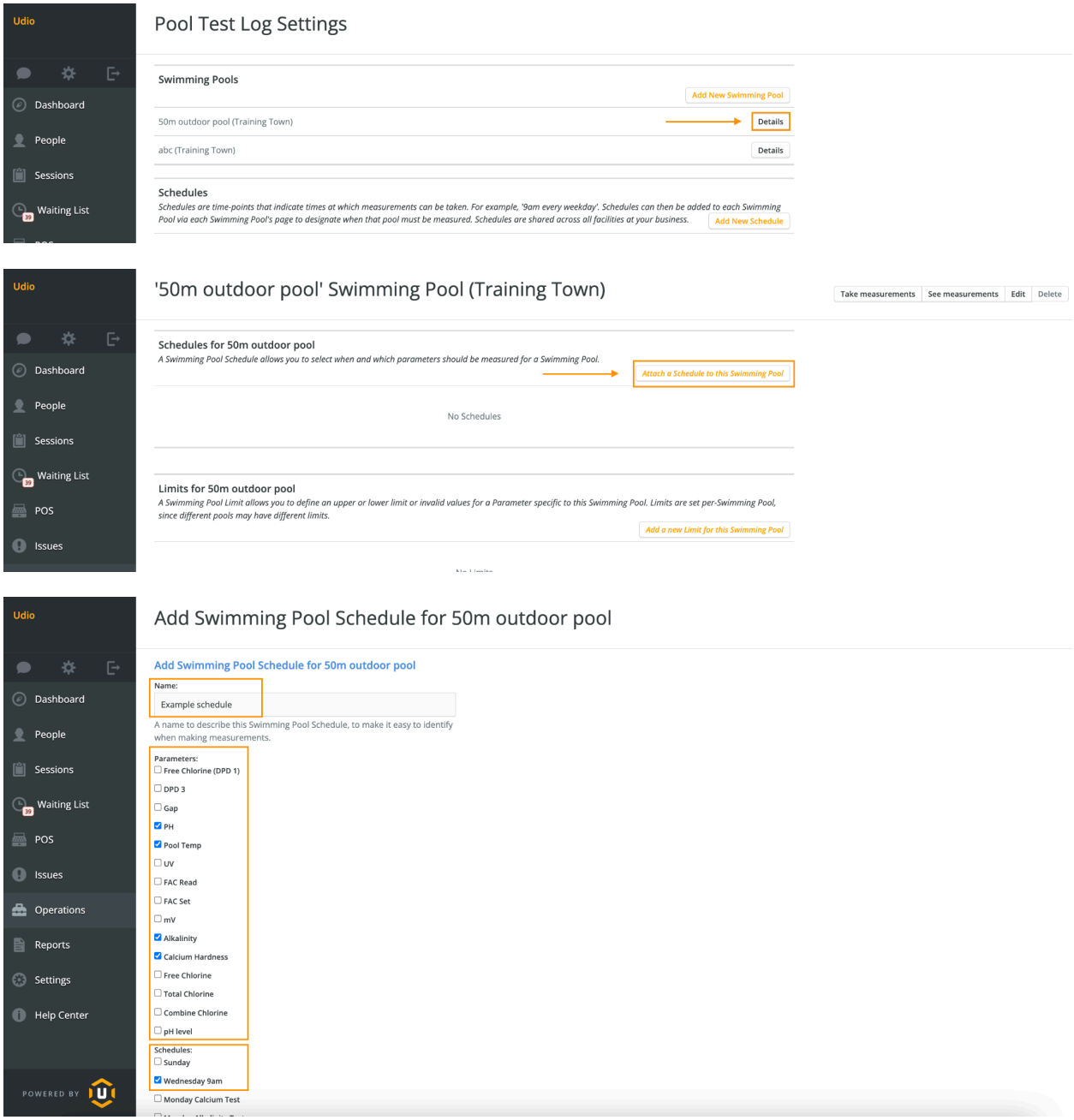


3.3 Create a swimming pool schedule

The swimming pool schedule records that a swimming pool needs certain parameters measured at certain days/times. Once you've added your parameters and schedules, you can then assign them to each swimming pool.

- Select *'Details'* next to the swimming pool
- Click *'Attach a Schedule to this Swimming Pool'*
- Give your schedule a name so it's easy to identify and tick the parameters you want to include
- Select your schedule and click *'Confirm'*

Once you've created your swimming pool schedule, you can start recording your measurements.

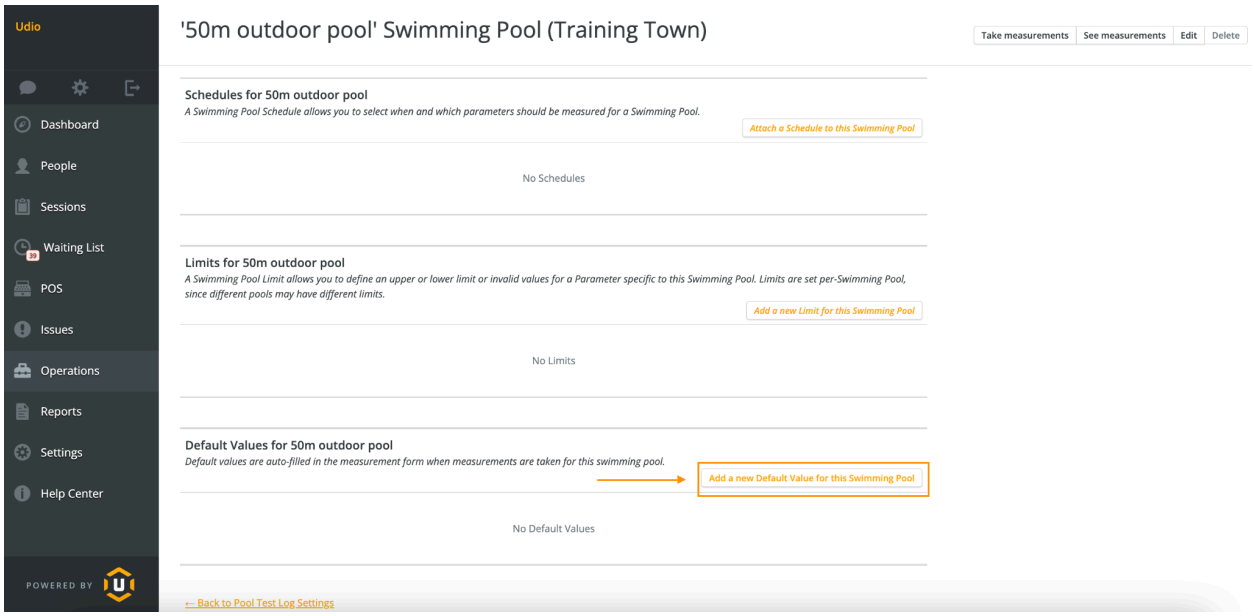


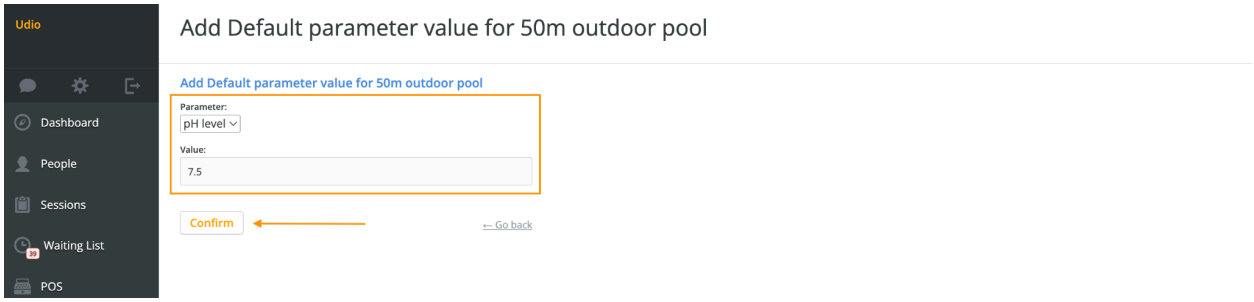
3.4 Set a default value

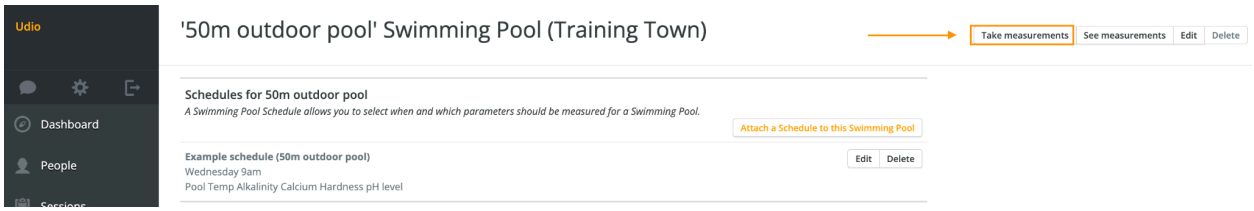
If any swimming pool parameters are often the same, you can set up a default value that will auto-fill under '*Measurement forms*' for that pool.

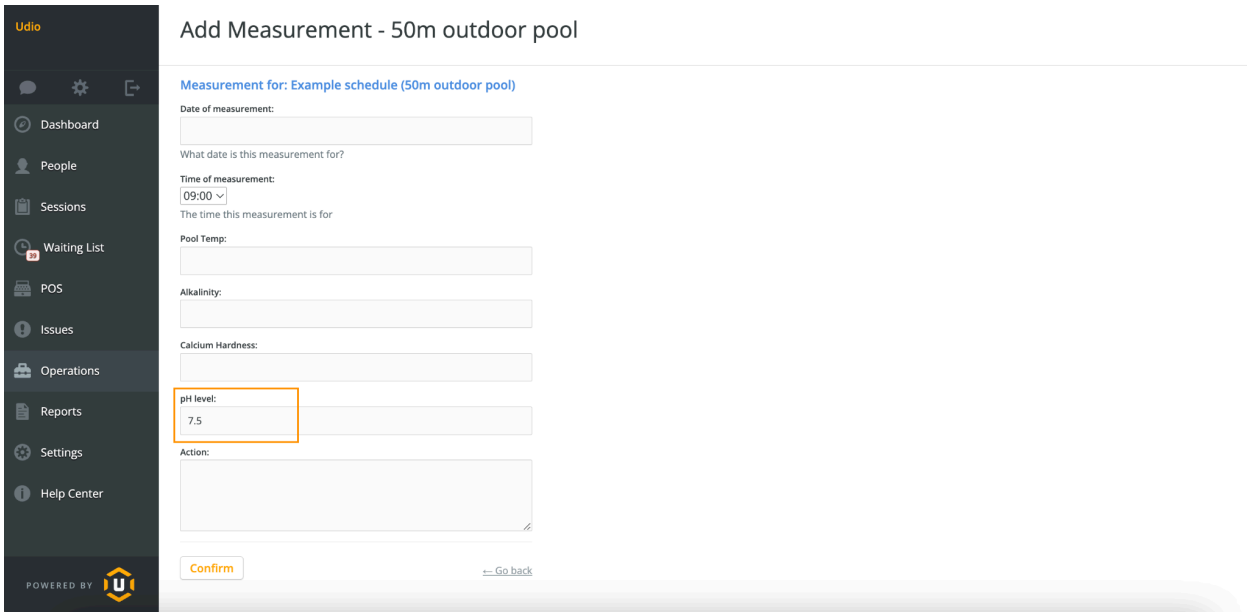
- Select your swimming pool and click *'Add a new Default Value for this Swimming Pool'*
- Choose the parameter, add a value and click *'Confirm'*

- To test, go to *'Take measurements'* in the top right-hand corner until you get to the 'Add Measurement' page - here you should see your default parameter value added to the corresponding field





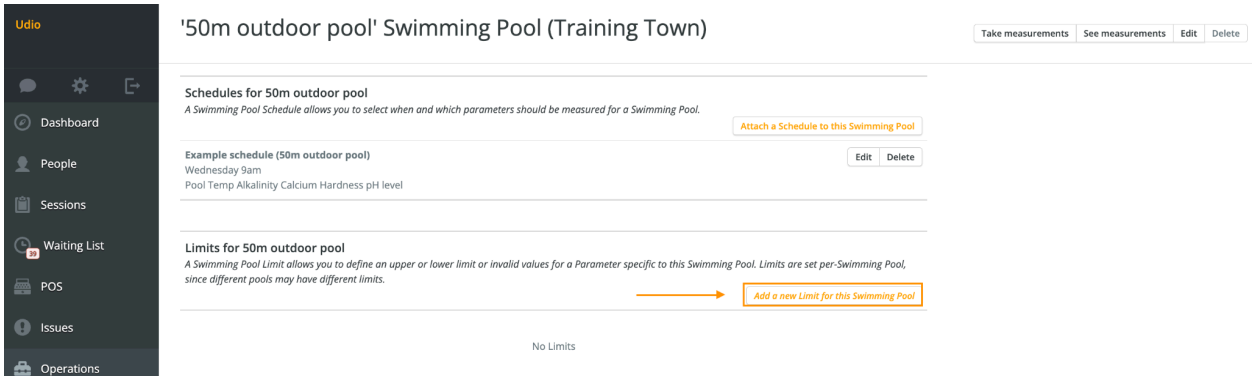




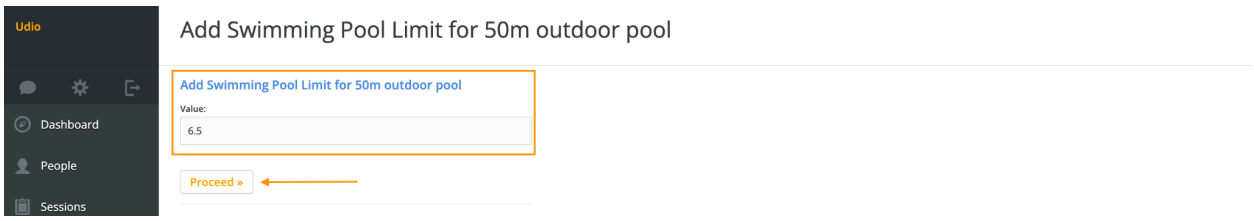
3.5 Add swimming pool limits

When you add limits to a swimming pool, you are asking Udio to raise an issue when certain recorded parameter values are: higher than a number; lower than a number; or invalid (not a number).

- On your selected swimming pool page, click '*Add a new Limit for this Swimming Pool*'
- Select your parameter and the reason for raising an issue then click '*Proceed*'
- Add your value and click '*Proceed*' again
- The limit should then show on the pool overview page
- Repeat the steps above until you have added all your limits





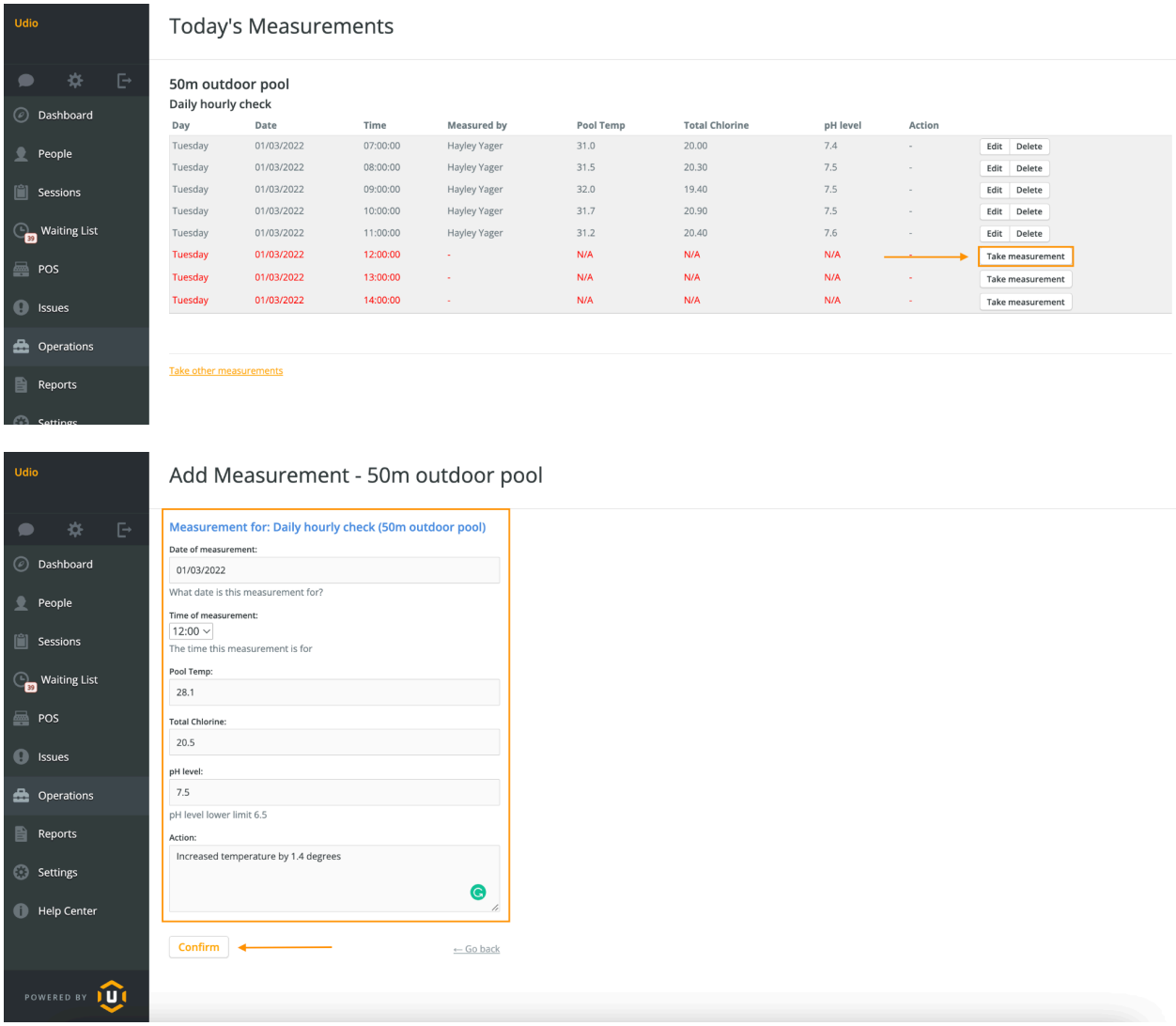


4. Measurements

4.1 Record measurements

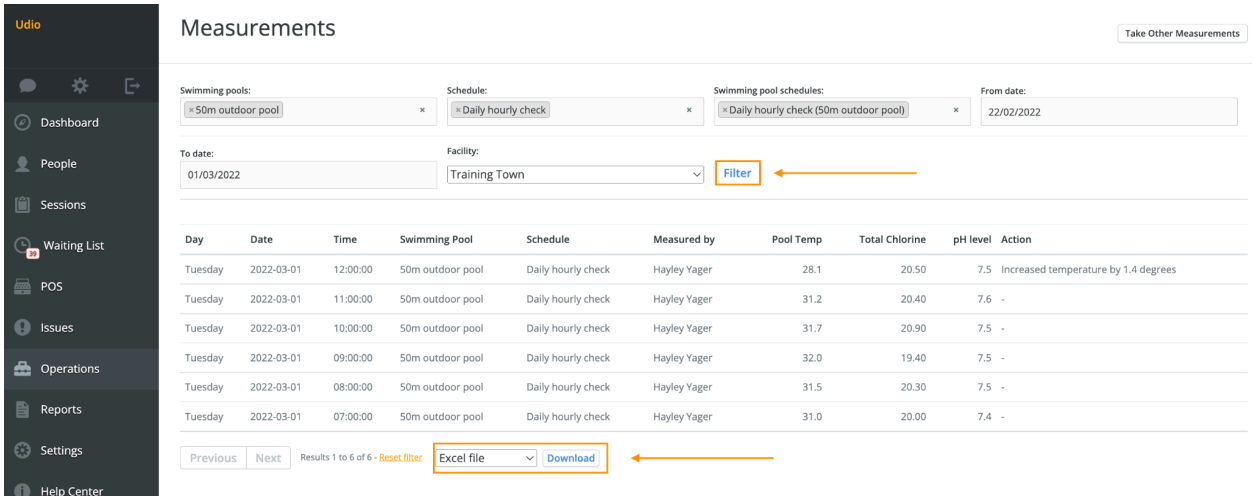
Once you've set your pool up with a schedule, you can then start taking measurements. To record a measurement:

- Go back to the 'Operations' tab and select *'Take Measurements'*
- Here you'll see a table of all measurements in all facilities you have access to that need recording today - any that have not yet been performed are coloured red
- Click *'Take Measurement'* on the right-hand side and input measurements, adding an action if required, then click *'Confirm'*



4.2 View measurements

Most businesses are used to recording measurements in a spreadsheet. Going back to the 'Operations' tab, click *'View Measurements'* to see a typical Udio filter form. Here, you can filter all measurements and download them in various formats.



Notes:

- If a recorded parameter value is outside limits defined by any *swimming pool limits*, its cell is coloured red
- If the measurements are filtered such that two or more *swimming pool schedules* that measure different parameters are displayed, any parameters that don't apply to a certain measurement will have a black-coloured cell
- Measured parameters that are not a number will display whatever value was entered, but have a red-coloured cell
- Calculated parameters that can't be calculated because a related parameter (one of the parameters used to calculate that parameter) is invalid will be coloured red and the value will be an exclamation mark (!)