FormsPro

User Documentation

2202.4.19

OmniByte

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CONTENTS

INTRODUCTION

OmniByte FormsPro is a mobile forms and workflow system that streamlines operations and increases consistent data capture and efficiency across an organization.

You can create unlimited mobile forms by users, user roles, and teams quickly and easily. FormsPro mobile data collection works online and offline with email, notifications, workflow, and reporting.

Data is collected on your smartphone or tablet. Data capture inputs include:

- Date and time
- Signature capture
- Image capture and annotation
- GPS capture
- Barcode and QR code scan
- Number, including calculated fields and color ranges
- Text and long text
- Select, checkbox, radio buttons
- Conditional fields
- Tables
- Data lookup from your systems

WHAT'S NEW IN 2202.4.19

Many new features have been added. You can find more information in the documentation for these features using the links provided. Contact us at support@omnibyte.com if you have any questions about any of these features.

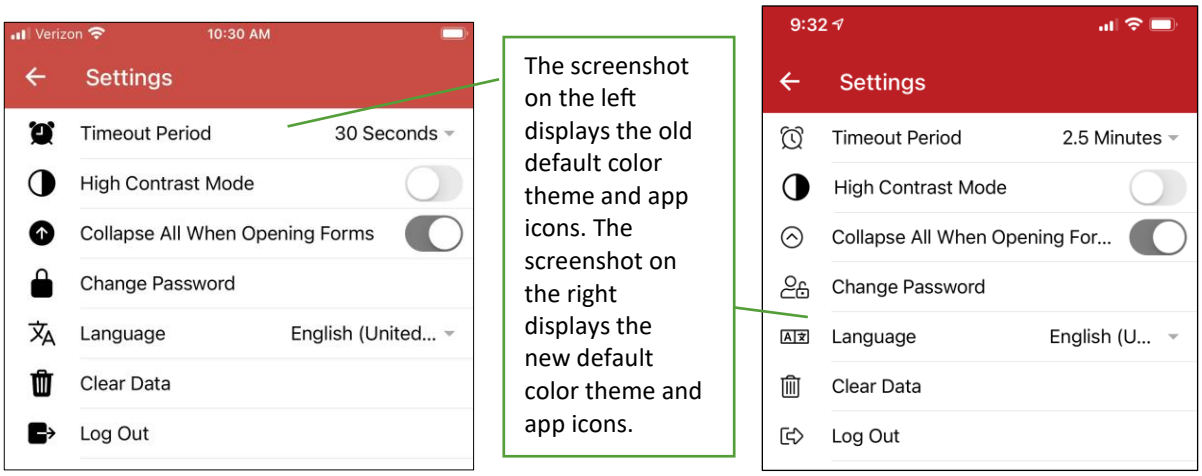
VERSIONING CHANGE

The versioning of FormsPro has changed to provide more relevant information. The version number now includes the year and the month of the release, along with the release and build numbers. So, this release of 2202.4.19, means it is build 19 of version 4 released in February 2022.

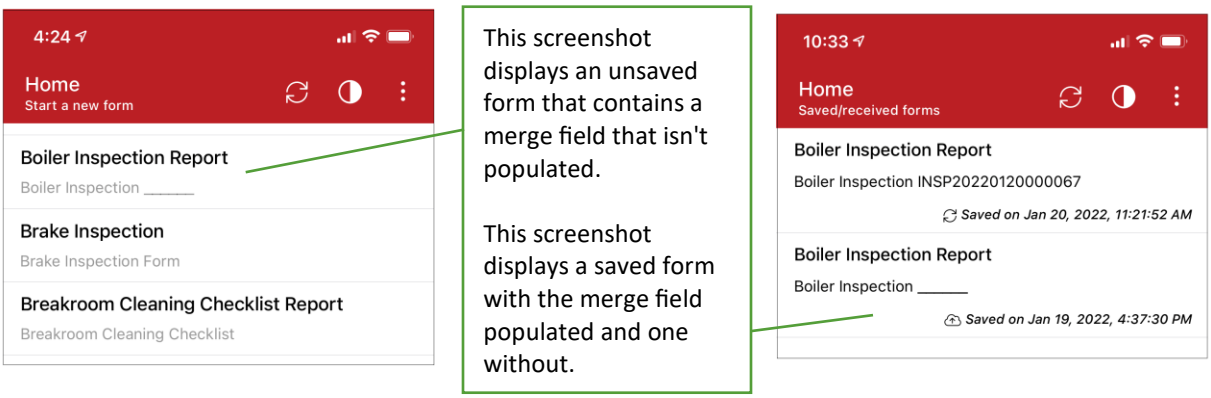
USER INTERFACE ENHANCEMENTS

The following user interface changes have been made in this release:

- The OmniByte and FormsPro logos, along with the default color theme, have been enhanced with richer, more vibrant colors. In addition, the icon set in the user interface of the FormsPro app has been changed to a set with a wider variety of options that provide a cleaner, updated look. All icons were replaced with a very similar icon to those in previous releases.



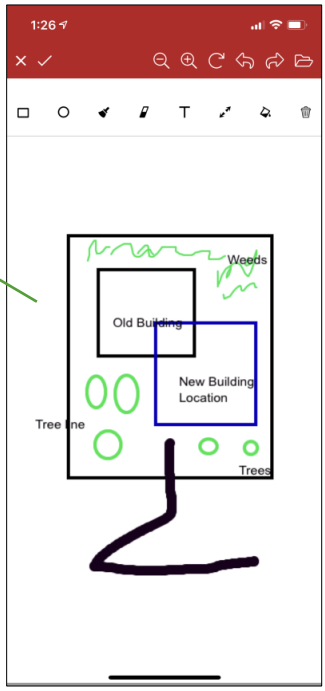
- Merge fields on unsaved forms now display as blank underlines instead of brackets to indicate information is not yet entered. After data is entered in the merge field the underline is updated with the field data once the form is saved. This applies to dispatched forms and forms in an envelope.



SKETCHPAD

You can now add drawings to a form using the sketchpad input. This is helpful when adding a photo to a form won't work, such as a floorplan, or plot of land that you can't get a whole photo of. You can draw basic shapes as well as straight lines or arrows, add text, and draw freehand. You can also use a photo as a background and sketch on the photo.

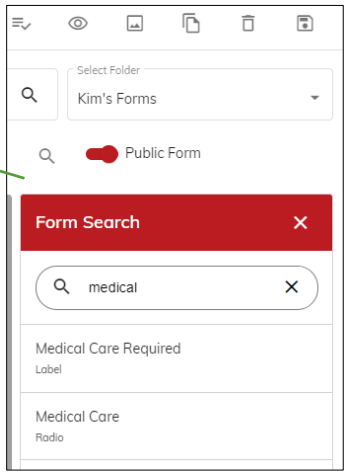
The is an example of how you might use the sketchpad input to draw a site plan.



FIELD SEARCH IN FORM DESIGNER

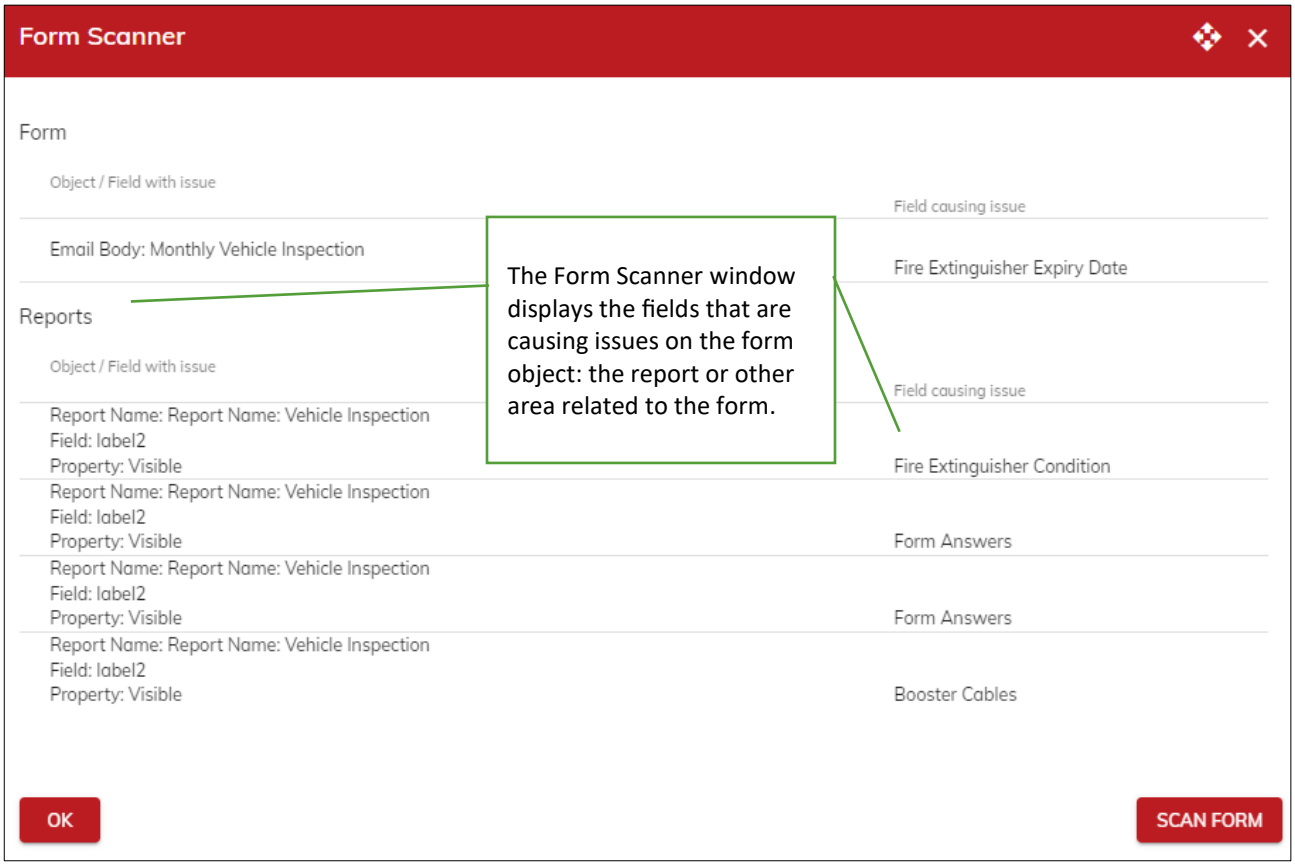
A form search has been added to both advanced and basic forms that allows you to enter the name of a field in the form designer so that you can find fields more efficiently. The search looks for any input that contains the word or letters you typed, including any labels, and options such as those in checkboxes and lookups. The results show you what type of field it is, and you can click the result to bring that field to the top of the designer.

In this example, "medical" was entered as the form search on a Workplace Incident/Accident form. The search found 2 input results: a label and a radio button.



FORM SCANNER

You can now scan your form for any errors or issues within the inputs that could cause problems, such as label changes that affect conditional fields, reports, or data maps. Use the list provided to resolve those issues before your app users encounter them.



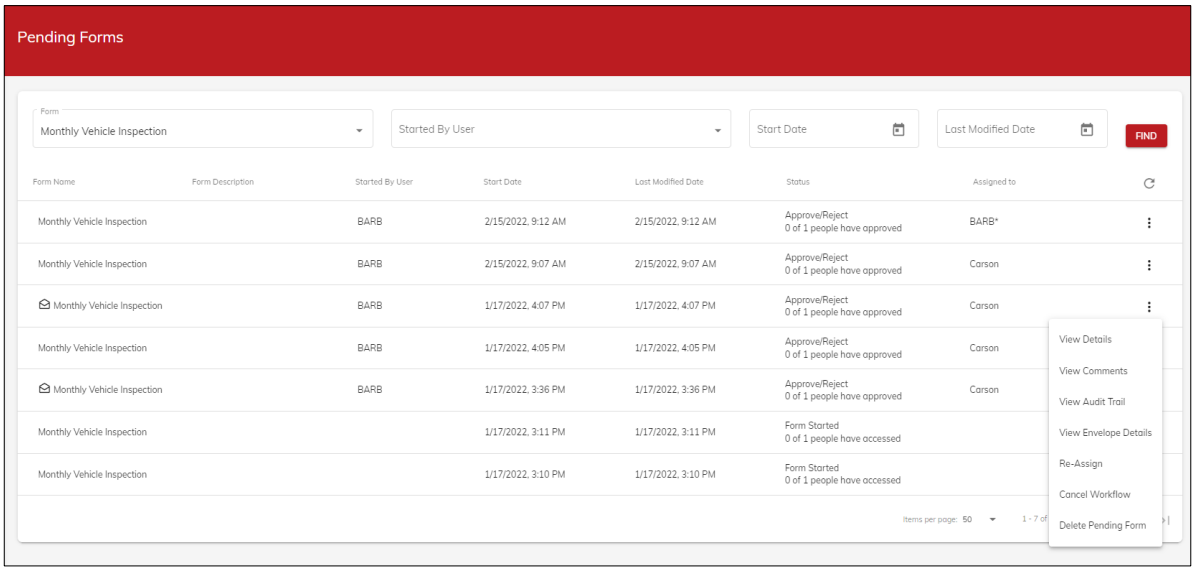
SYNC IMPROVEMENTS

Syncing in this release has been improved so that app users should experience faster sync times and background syncing is provided.

WORKFLOW ENHANCEMENTS

The following workflow enhancements have been made in this release:

- View details in the Pending Forms page that are more relevant for your workflow submissions. The re-design of this page allows you to easily view workflow details without having to navigate further on each line. Information that has been added includes the form description, the user who started the workflow and the date it was started. An asterisk in the Assigned to column displays the user to whom the form is checked out. An envelope icon next to the form name indicates the form is in a pending workflow and in an envelope. The View Envelope Details option has been added to the More menu to view the details about the envelope.



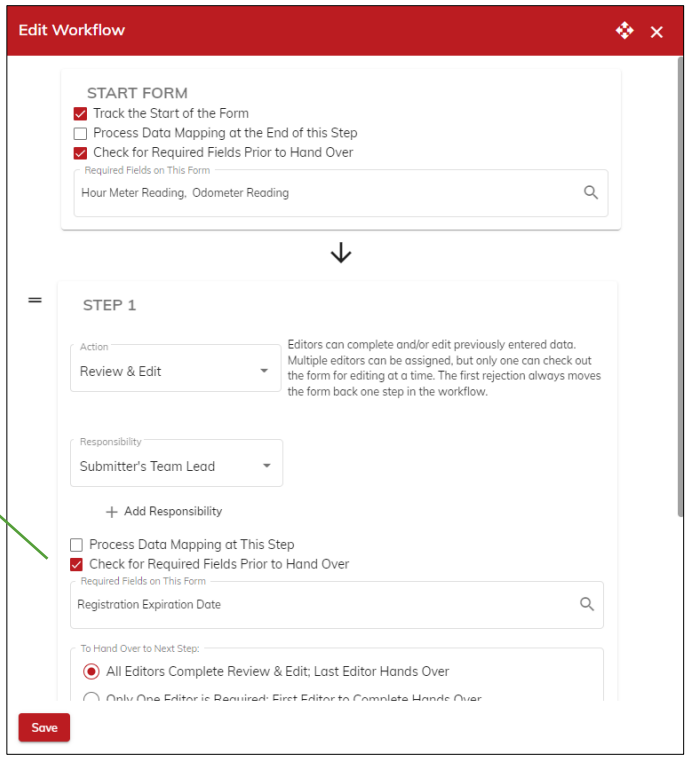
- A workflow action step can be sent to the submitter's primary team lead. Regardless of who is completing the form, that person's team lead is responsible for the workflow step.

The new Submitter's Team Lead responsibility has been added to the Edit Workflow window.

In the app, if the user is on more than one team the lookup displays the primary leads for the teams the user is a member of. If the user is not on a team the field lists all the team leads and the user needs to choose one to submit. If the user is on only one team, the primary lead appears and cannot be changed.

- Specify which required fields on a form must be completed at the review and edit step in a workflow, instead of at the final submission of a form, which can be too late. The necessary required fields are checked for entries before moving to the next step in a workflow.

The Check for Required Fields Prior to Hand Over option has been added in this release to check for necessary required fields before moving to the next workflow step.



MEDIA ENHANCEMENTS

In this release, the Image/Attachments input has been renamed to Media and the Edit Image/Attachments window has been renamed to the Edit Media window. You can now record audio files, limit the file size of uploads, limit the length of video and audio attachments, display thumbnails for video attachments, display the time and file size of video and audio files in the app, add default captions, send different types of media to different attachment connections, and preview videos. In addition, there are now tabs for the different types of the media input:

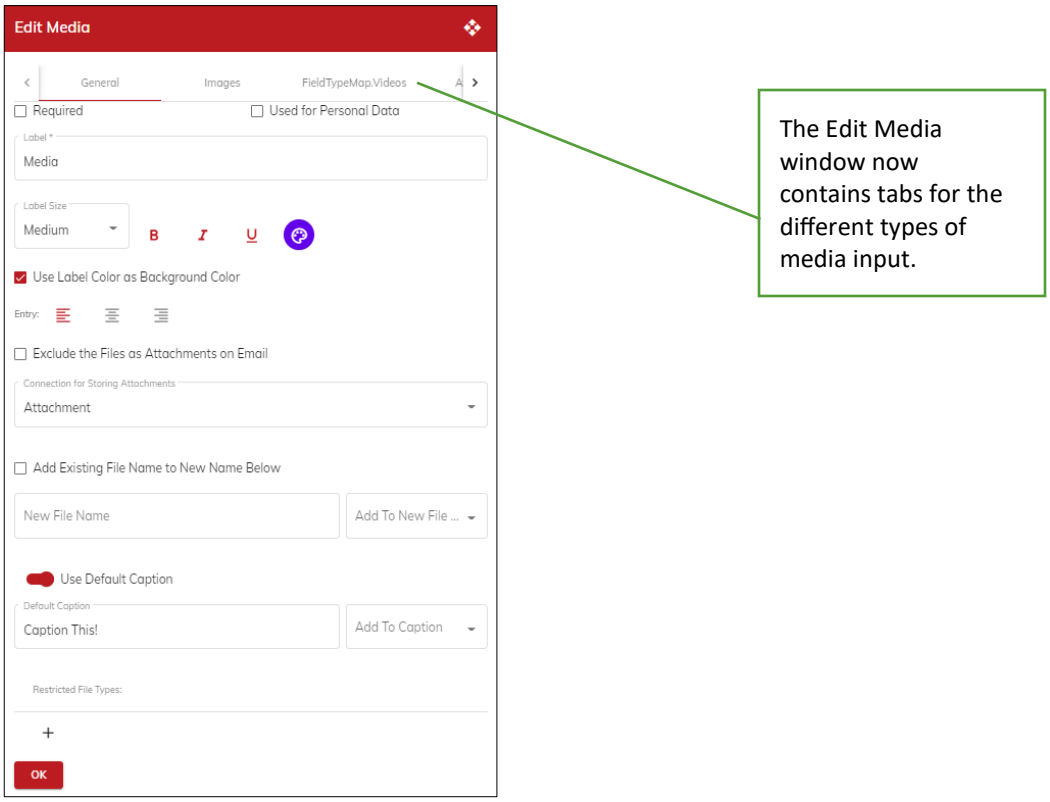
General: Contains the basic settings for the input such as visual settings for the field and the main attachment connection for the field.

Images: Contains the settings for images that are taken while in FormsPro or selected from the gallery if the option is enabled.

Videos: Contains all the settings for videos that are taken while in FormsPro or selected from gallery if the option is enabled.

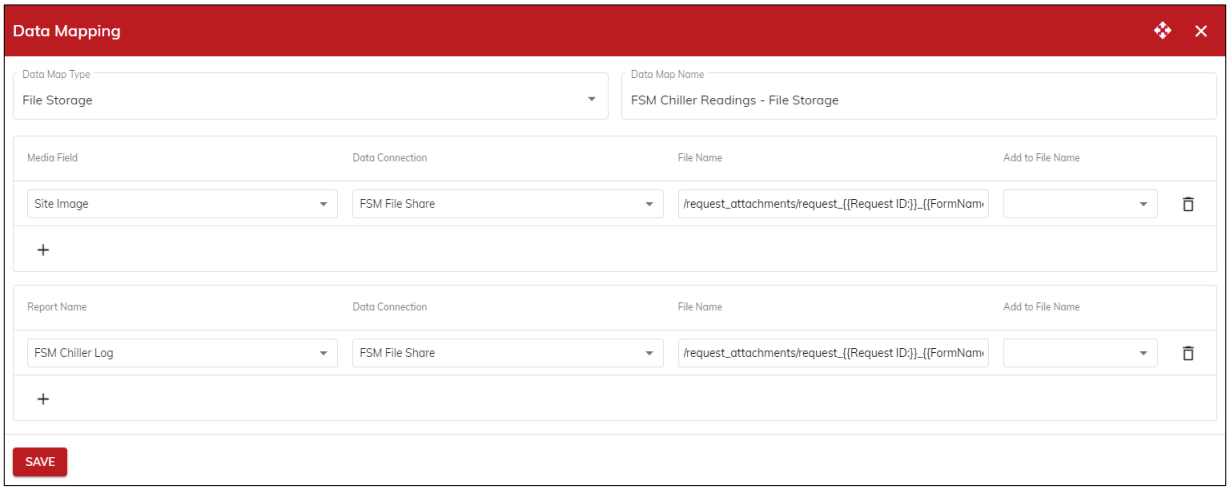
Attachments: Contains options that allow you to limit the size, default captions, and use a separate attachment location.

Audio: Contains options that allow you to limit the size, default captions, and use a separate attachment location.



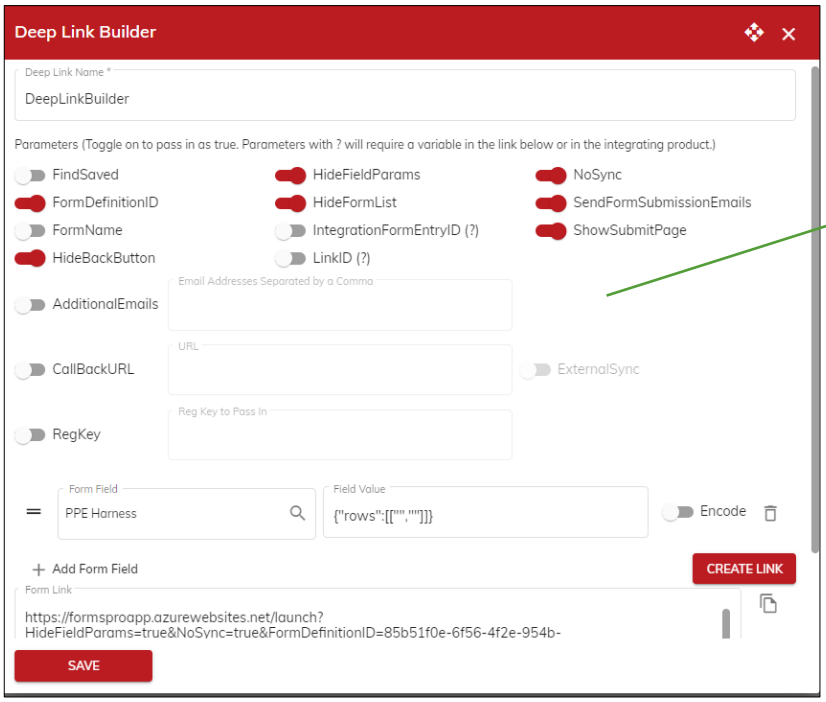
DATA MAPPING ENHANCEMENTS

Data mapping now has a more consistent interface that makes it easier to create and modify data maps. You can now resize the editor window to full screen mode, search for fields on the form, and preview data map results. A new file storage data map type has been added to store attachment, image and field data from an attachment, or image of a certain location.



DEEP LINK BUILDER

A new Deep Links tab has been added to the Form Settings window that provides a consistent method for creating and updating any deep links on a form. The deep link builder provides all the parameters available, and the fields on the form for easily adding them to the deep link.



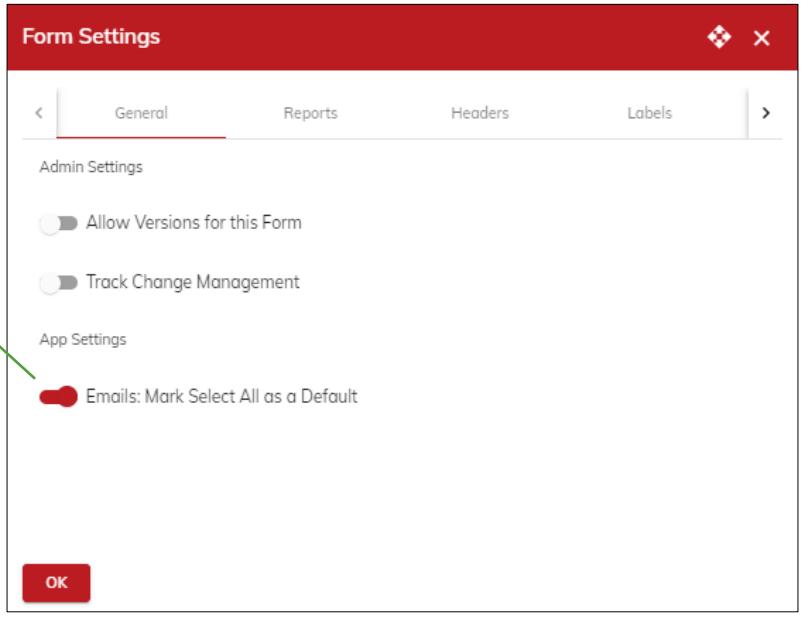
The new deep link builder allows you to create a link from another app to a form.

EMAIL ENHANCEMENTS

The following email enhancements are included in this release:

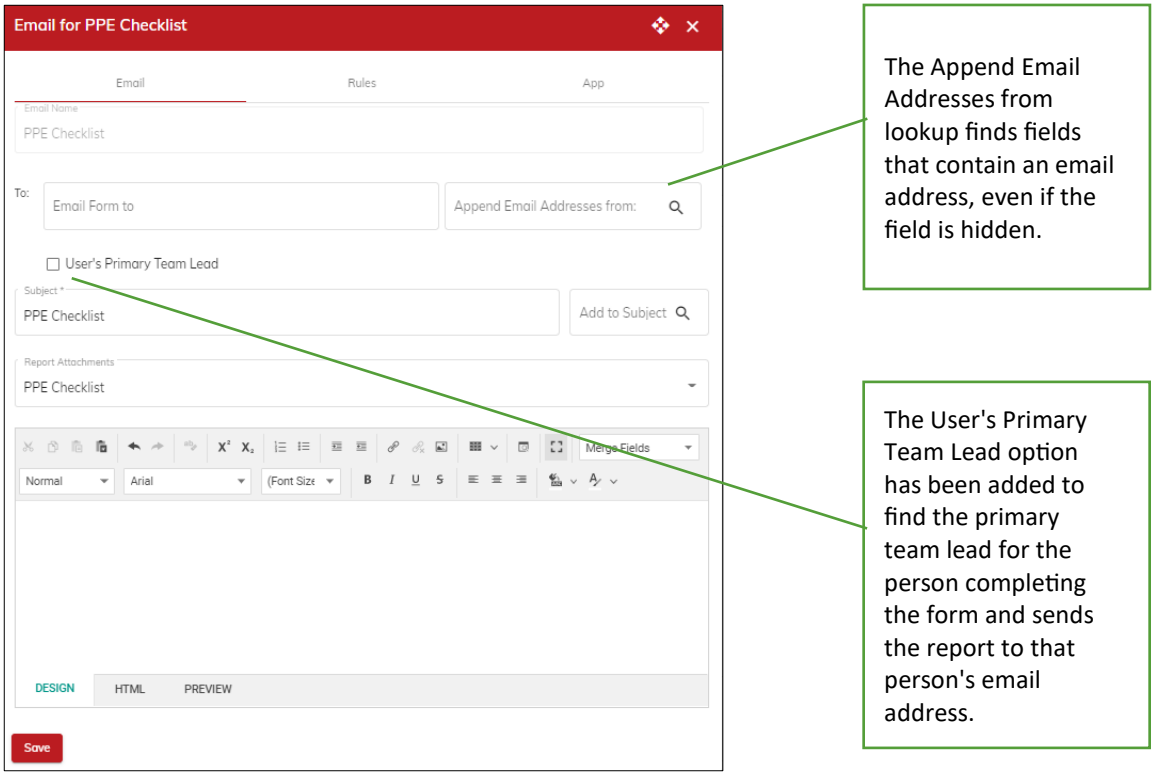
- For each form, you can set the emails that the form will be sent to as marked on the app so that the app user doesn't have to decide who should receive the reports or forget to mark them before submitting. This has been added at the individual form level so that when you have forms that the user does need to be more selective about the emails, it's not automatically marked.

Toggle on the Emails: Mark Select All as a Default option to automatically mark the Select All option in the Emails section of a form.

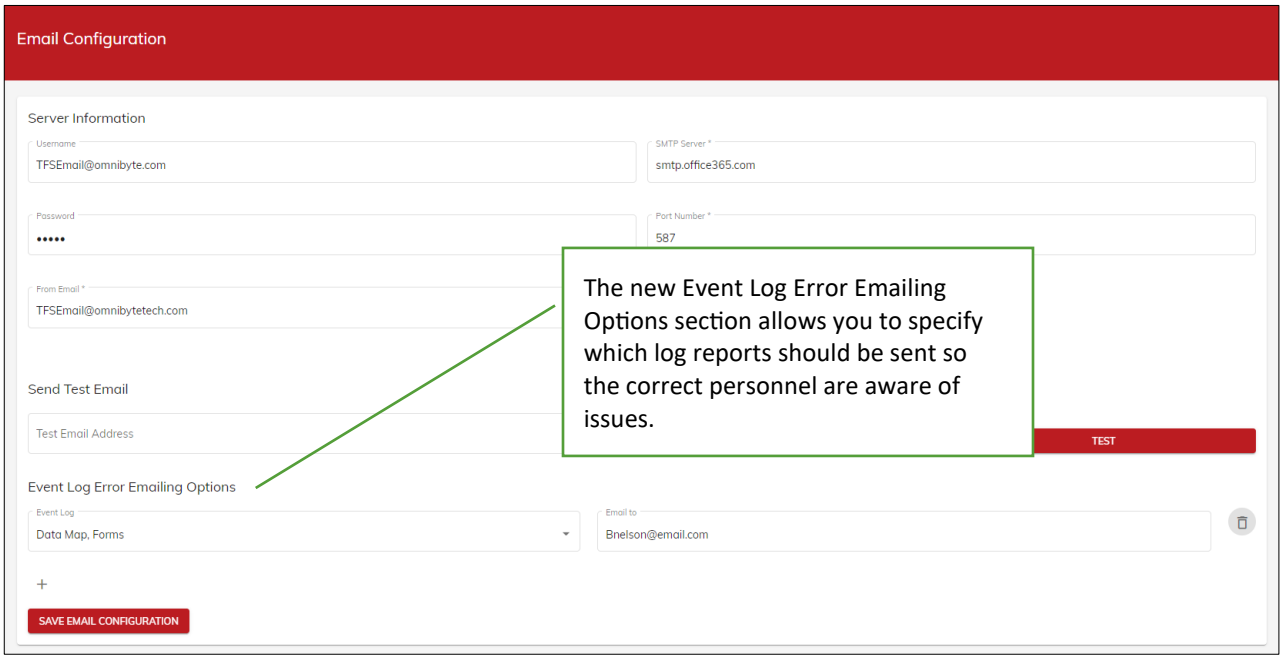


- The Email window for each form is updated with new fields that allow you to select an option to send the email to the user's primary team lead, as well as to append email addresses from fields on the form

that may be hidden. This can be helpful when depending on a tech's form answer the form needs to be emailed to a supervisor.



- Specify which event log error emails should be sent to ensure the right personnel is aware of errors and failures.



DEFAULT TIMEOUT PERIOD FOR APP

The Security Settings window has been redesigned to include a Password Settings tab and a Device Settings tab. The Password Settings tab contains existing functionality for multifactor authentication and password information for non-SSO users. The Device Settings tab contains new functionality where you can set a default timeout period for all devices. Timeout periods can be specified from 30 seconds to 3 minutes, in 30 second increments. Technicians can change the default on each of their devices using the Settings page in the FormsPro app.

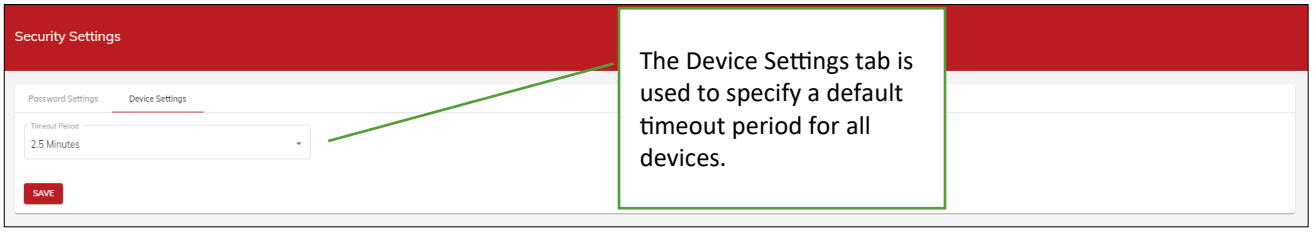
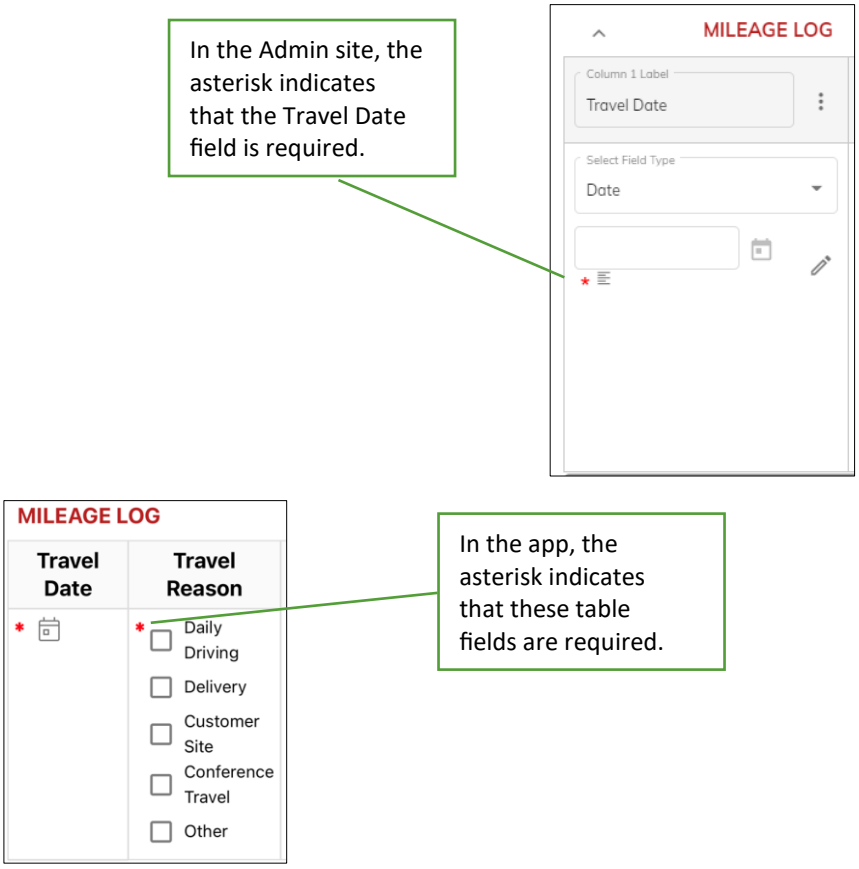


TABLE ENHANCEMENTS

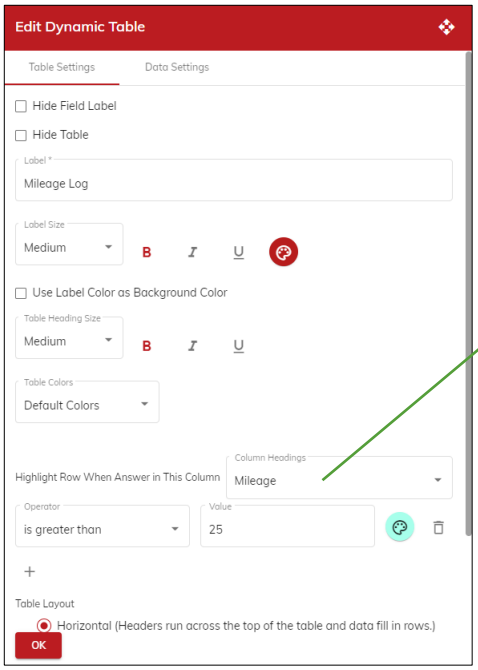
The following table enhancements have been made in this release:

- Required fields in tables are now indicated with an asterisk in the upper left corner of the cell. This reduces conflicts with other color formatting you may add to tables.

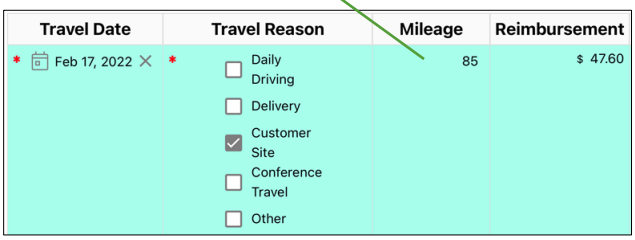


- You can set a row to be highlighted with a background color based on the way a particular column or cell is answered in a table. The highlight color you set up also applies to the report, so you'll no longer need to set up functions for that purpose.

If you are also using conditional number formatting, conditional highlights in a row take precedence over the conditional number formatting.

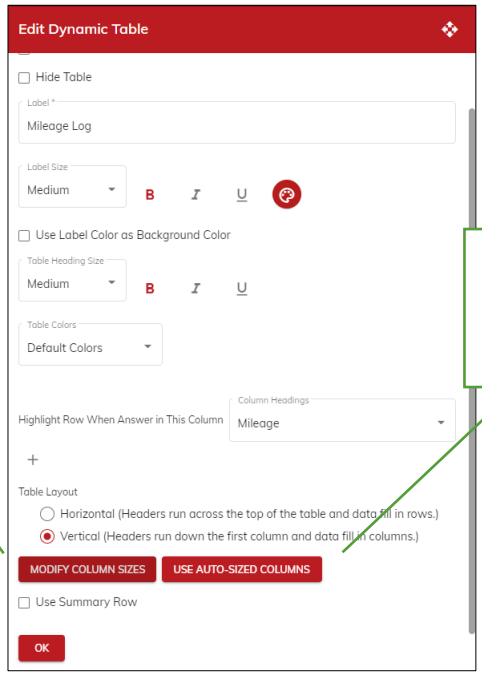


In the Edit Dynamic Table window, it was specified that when the Mileage column is greater than 25, the row in the table will be mint green.



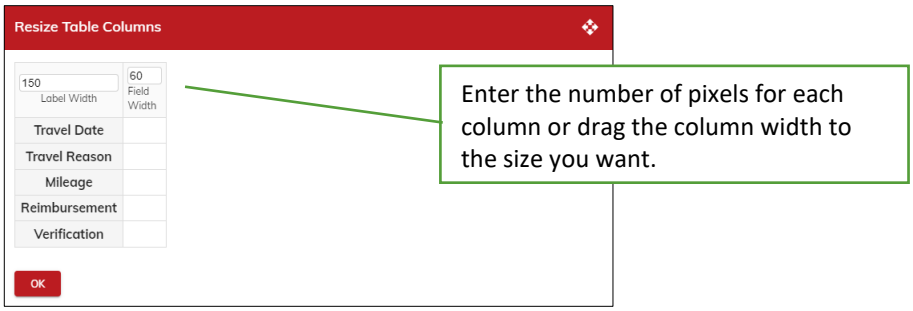
- **Modify Vertical Table Column Widths:** The ability to size columns for vertical tables has been added. This is useful when you have tables with columns of numbers you are trying to view on smaller devices, such as phones.

Click to open the Resize Table Columns window.



Click to revert all the changes back to the default auto-sized columns.

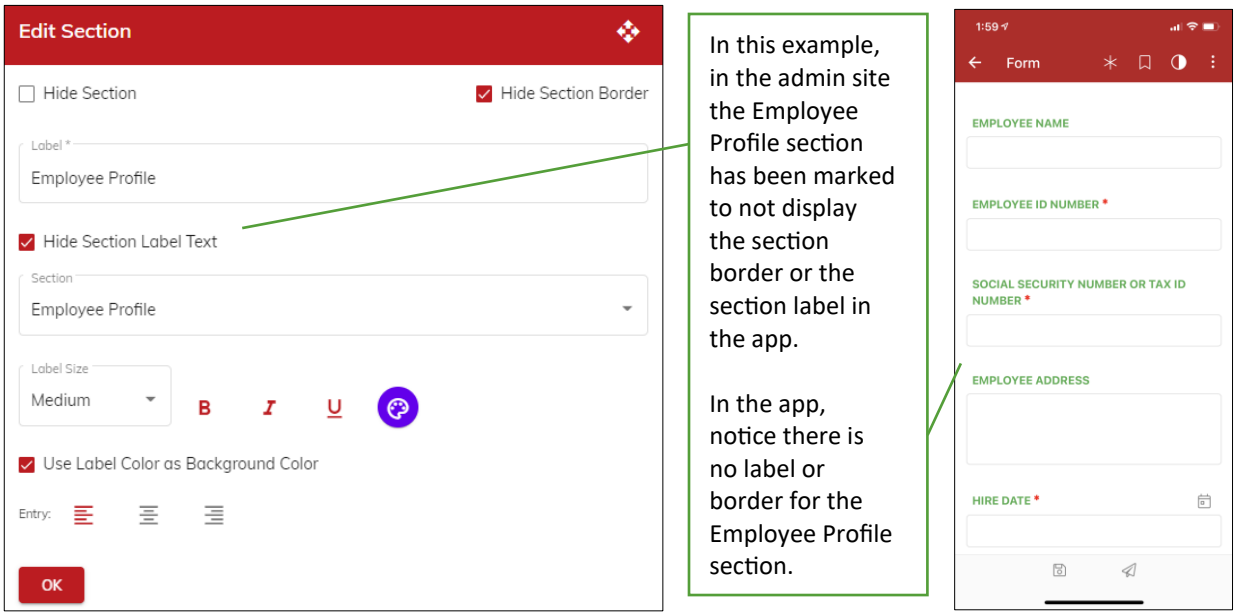
Click the **Modify Column Sizes** button to open the Resize Table Columns window. This window displays a "preview" table where there is a number field at the top of the table header where you can enter a pixel number, or you can drag the column width to the size you want.



If you want to revert the changes you've made, click the **Use Auto-Sized Columns** button in the Edit Dynamic Table or Edit Static Table windows. Once the columns are reverted, this button is disabled again until you click the Modify Column Sizes button.

HIDE INPUTS IN APP

You can now mark a form input in the admin site as hidden to prevent it from being displayed in the app. This is helpful, for example, when you're bringing in data from an integration that drives data on the form, such as conditions or calculations. You can hide the integrating information and only display the resulting data. You can also hide table and section labels as well as section borders.



To hide the label text in a table, click ⋮ next to the column label and mark **Hide Label Text**.

When an input is marked as hidden, is displayed in the admin site.

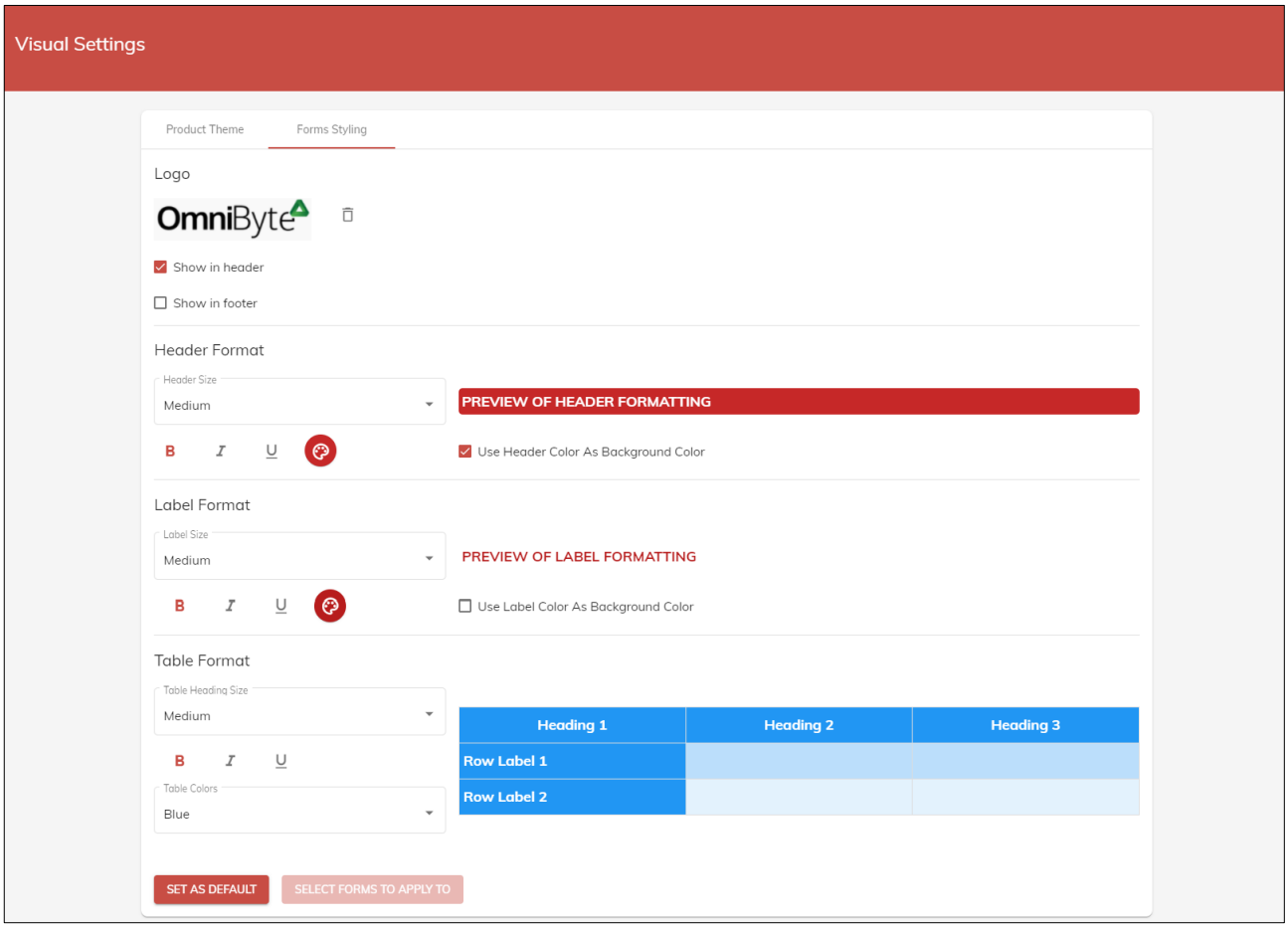
IN CASE YOU MISSED IT, WHAT'S NEW IN 4.5

Many new features have been added. You can find more information in the documentation for these features using the links provided. Contact us at support@omnibyte.com if you have any questions about any of these features.

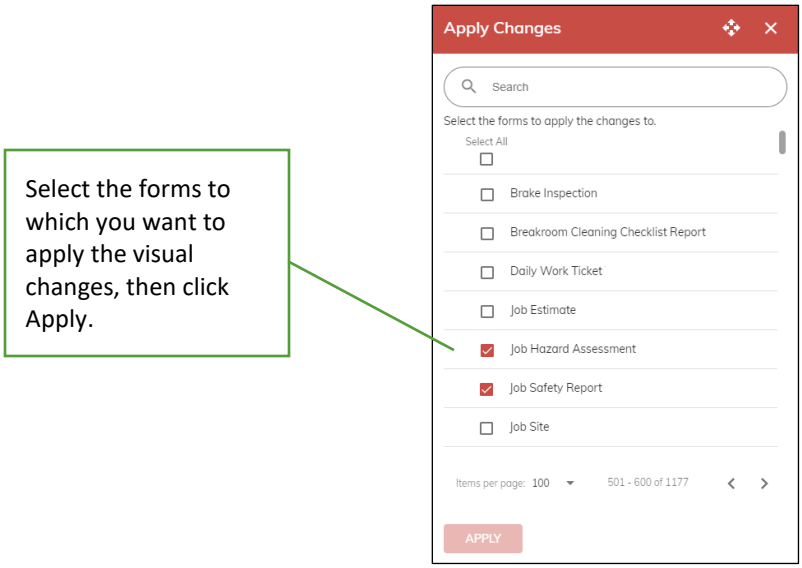
THEME SETTINGS

In this release, the Theme Settings page has been changed to the Visual Settings page, where general form format options are set and now contains two tabs:

- **Product Theme tab** Used to set the color theme for the admin site and the mobile app, which in previous releases was done on the Theme Settings page.
- **Forms Styling tab** Used to set general visual formatting options for logos, headers, labels, and tables that are automatically applied to all new forms. Existing forms can be set to your new options for consistency across the platform. This feature can be very useful for things like applying your corporate branding color to the platform and applying your corporate logo to all forms at one time. All visual settings, except the branding color, can be changed at the form and individual level for maximum flexibility.

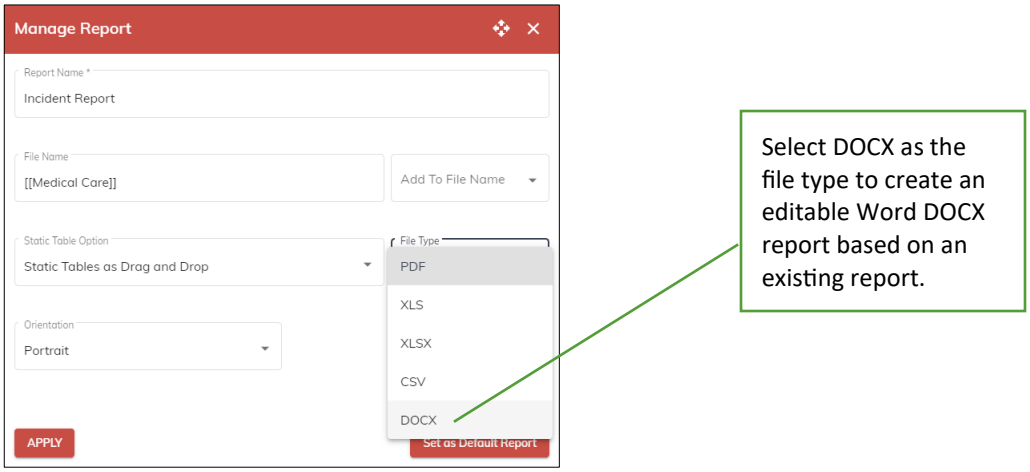


If you want to apply the form styling to only certain forms, click the **Select Forms to Apply to** button to open the Apply Changes window. Select the forms to which you want to apply the changes, then click **Apply**. Formatting options can be overwritten on the form and each field.



DOCX FUNCTIONALITY

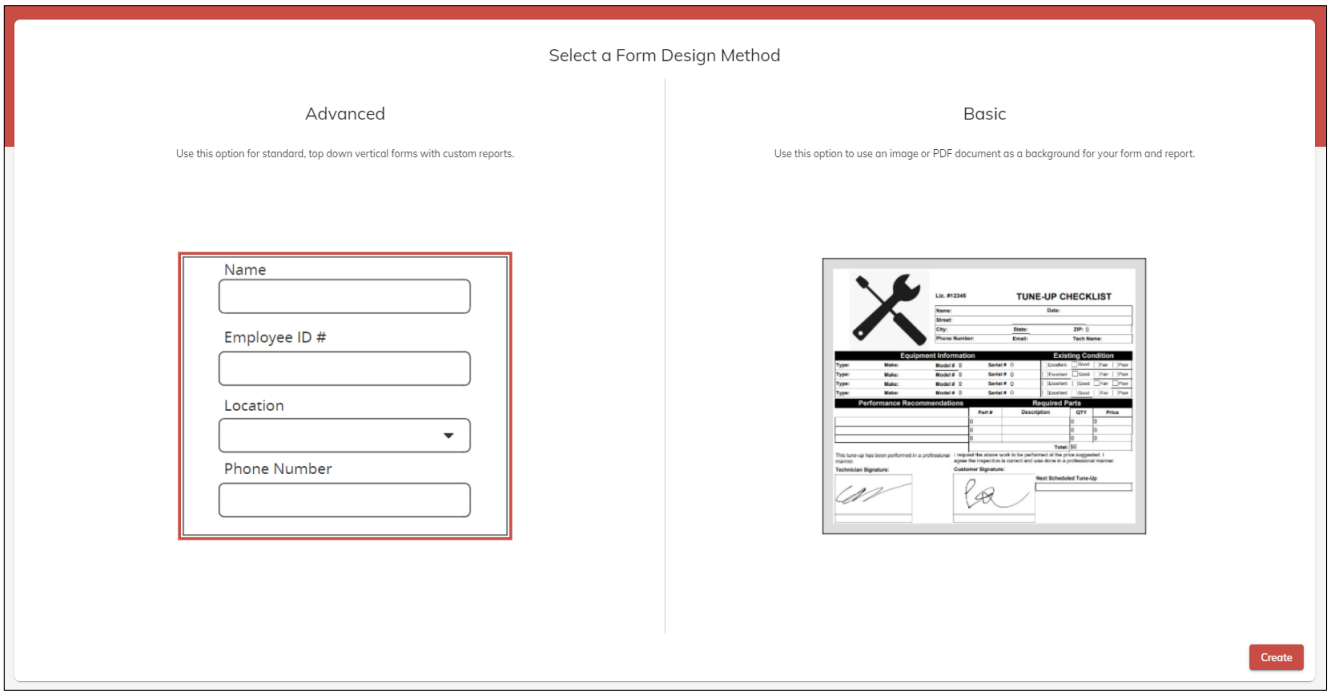
The DOCX file type has been added in the Manage Report and Create an Additional Report windows to allow you to generate an editable Word DOCX report. This can be useful when you need to edit or add long text fields. If you have a form that needs a DOCX file attached or emailed, you can create an additional report as a copy, so you don't have to create a new report.



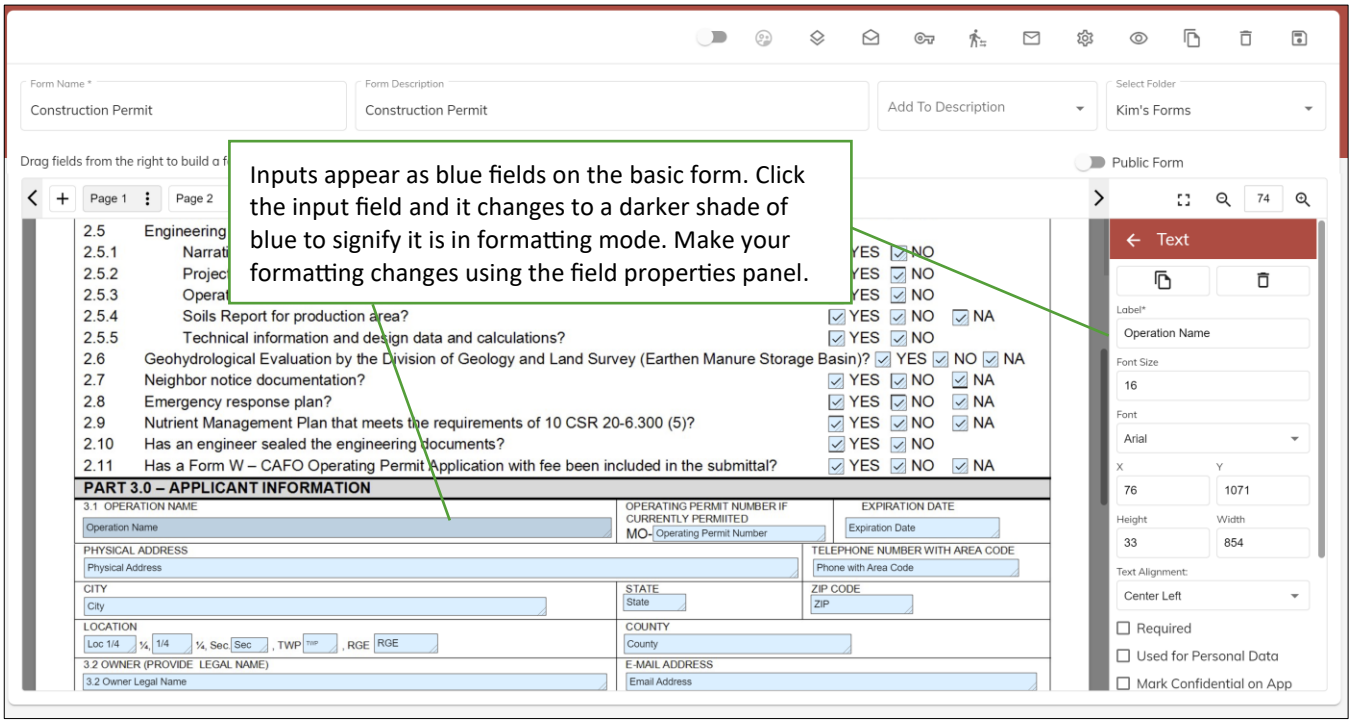
If you need the DOCX report to have a different layout than the PDF report, use the Report Designer to make your changes.

BASIC FORM DESIGN USED AS A BACKGROUND

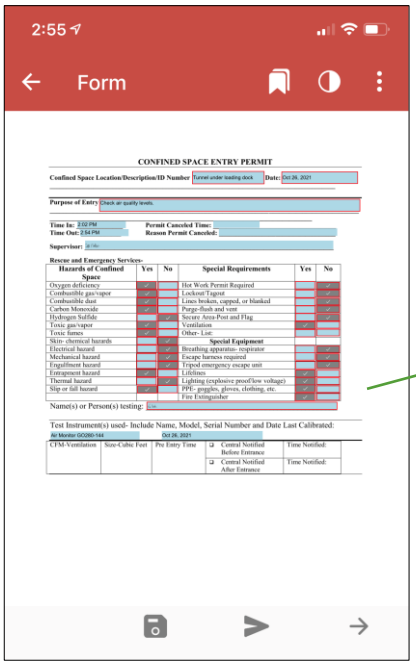
When creating a new form, you can now create either an advanced form or a basic form. Advanced forms are designed in the standard, top down, vertical manner and create custom reports. Advanced forms use the standard form builder that you are familiar with from previous releases. Basic forms are new in this release and use an image or PDF document as a graphical background for your form and report. It's a simple way of transforming a paper form to a digital format and can be very helpful if you have forms you need to complete such as government certifications or permits.



In the Forms Designer, you can drag inputs onto the background at any location and resize the field to match your existing form. Then click in the input field and format the field as needed using the field properties panel. The background is part of the form and appears in the app when entering data and on the report.



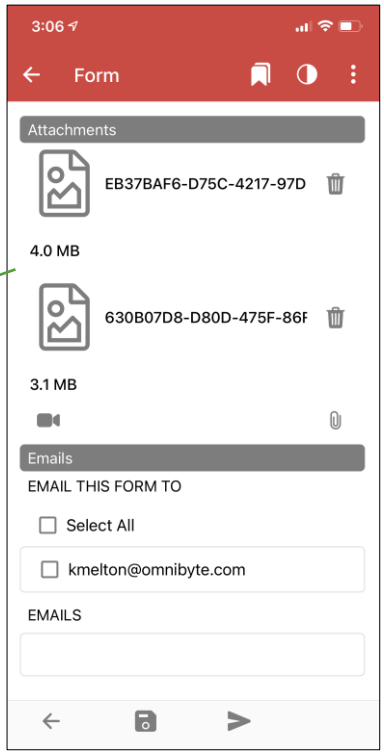
In the mobile app, a basic form opens with all the normal functionality of the app. The app uses pinch-to-zoom functionality to zoom in and out of the displayed content on the device. To use pinch-to-zoom, touch two fingers on the screen, and move them apart to zoom in, or move them together to zoom out.



This example shows a completed basic form on the device. The mobile app uses pinch-to-zoom functionality to easily view and populate the fields on a form. The fields with a red border around them are required fields.

If attachments are enabled for a basic form, the Attachments section appears above the email section at the end of the form on its own page. To view this page, click → (Next), or use the table of contents to go to the Final Page before submitting the form.

This example shows attachments on the last page of the form. Attachments appear in the order they were added.



DRIVE CONDITIONS BASED ON DYNAMIC TABLE SUMMARY INFORMATION

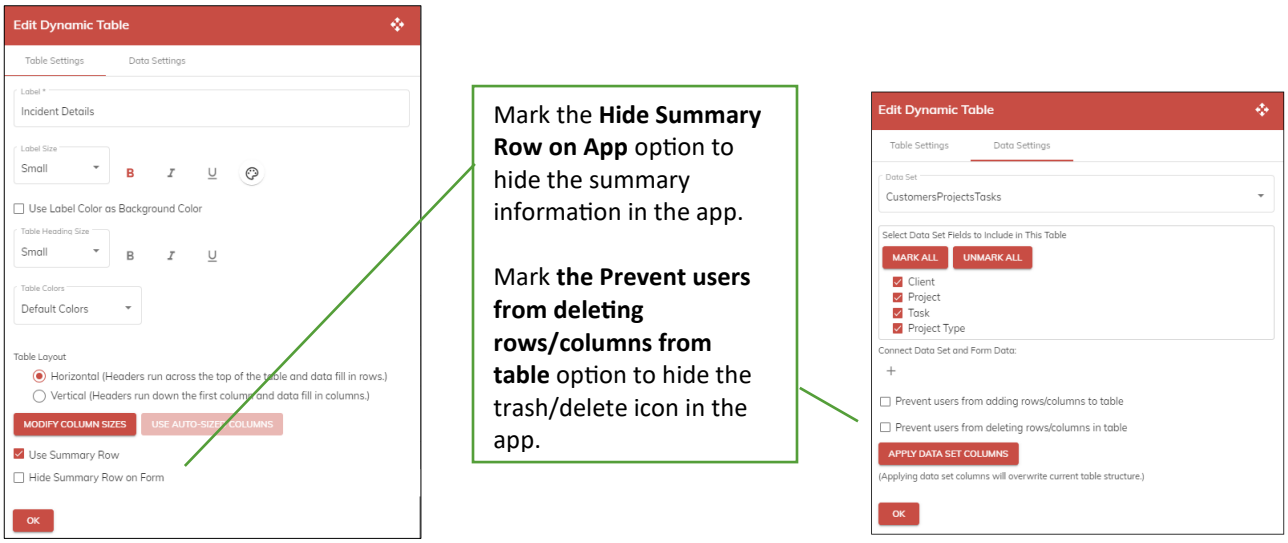
Dynamic table columns can now be summarized using a TEXTJOIN function. The TEXTJOIN function combines text in the summary row dynamic tables. The dynamic table can contain data sets when using the TEXTJOIN function. This can then be used to format a condition to show and hide information contained in that column.

The TEXTJOIN option has been added to the dynamic table summary row, which provides the ability to drive a condition based on dynamic table summary information. TEXTJOIN can be selected as the summary option for columns that are set to: Checkbox, Select (Single or Multiple), Lookup (Single or Multiple), Radio, Text, Long Text, Number or Calculated field.

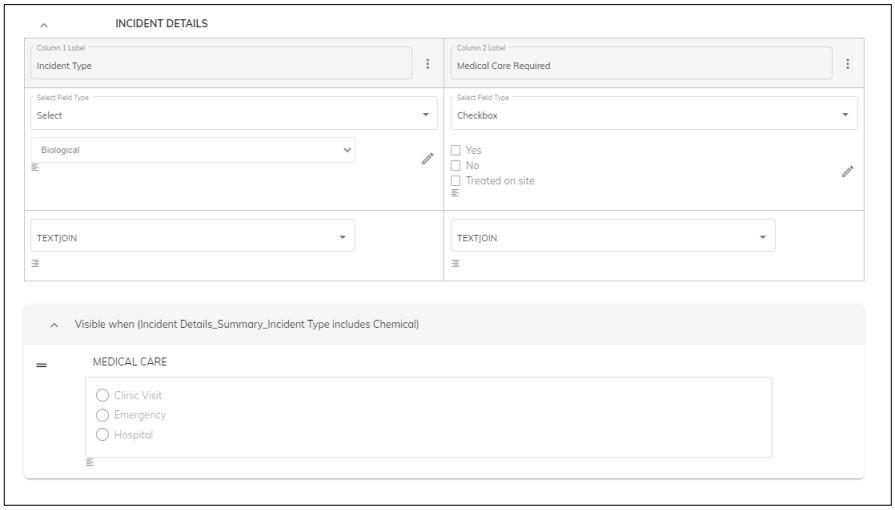
TEXTJOIN is the default for all summary types except for Number and Calculated.

The **Hide Summary Row on Form** checkbox has been added to the Edit Dynamic Table window so you can hide the resulting summary information from the app user.

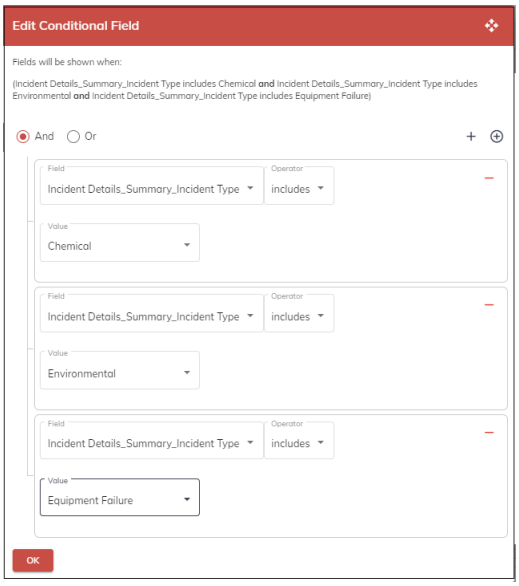
On the Data Settings tab of the Edit Dynamic Table window, the **Prevent users from deleting rows/columns from table** option has been added. This hides the trash/delete icon in the app so app users cannot delete any lines.



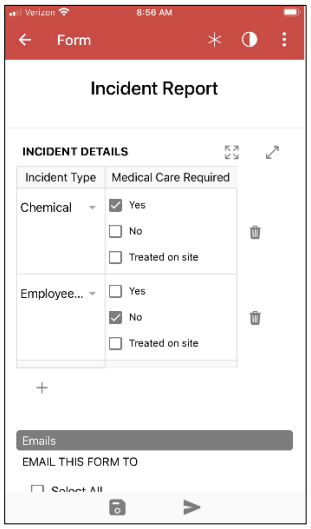
For example, let's say you have an incident report with a dynamic table about the type of incident. The dynamic table contains an Incident Type column and a Medical Care Required column. Based on an incident, follow-up care may be required. The rest of the form contains fields dependent on the information in the dynamic table. If the **Use Summary Row** is marked in the Edit Dynamic Table window, and the appropriate field type is selected, the summary type of TEXTJOIN is displayed. This creates a list of all the options selected for that column.



Use the Edit Conditional Field window to indicate what is used in the summary for the dynamic table column. When the summary type is TEXTJOIN, the operator options are Includes and Does Not Include.

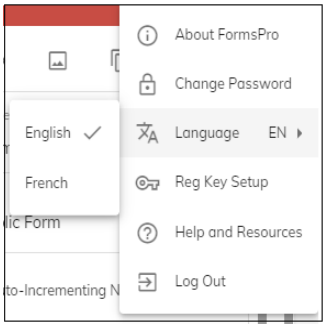


The TEXTJOIN options are never shown in the FormsPro app, so an app user will not see them. If the summary row is not marked to be hidden in the Edit Dynamic Table window, and no other summary options are selected, a narrow bar appears in the dynamic table in the FormsPro app.



FRENCH LANGUAGE SUPPORTED IN ADMIN SITE

French is now supported in the admin site. This provides full administration of your FormsPro platform in your native French.

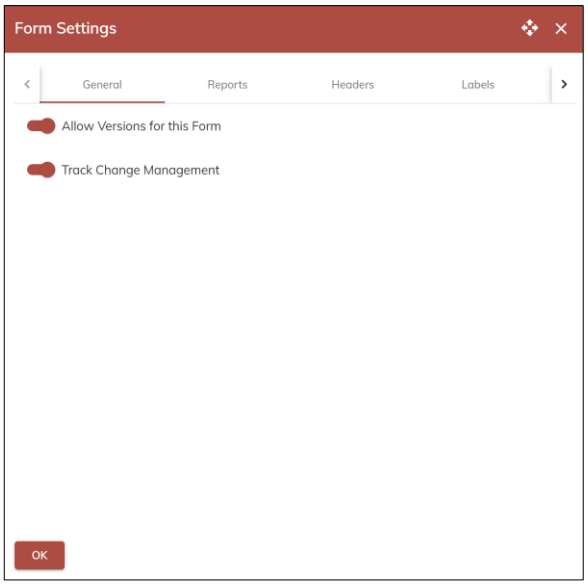

About FormsPro
Change Password
English
Language
EN
French
Reg Key Setup
Help and Resources
Log Out

IN CASE YOU MISSED IT, WHAT'S NEW IN 4.4

Many new features have been added. You can find more information in the documentation for these features using the links provided. Contact us at support@omnibyte.com if you have any questions about any of these features.

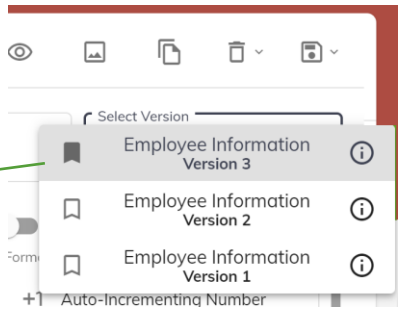
VERSIONING AND CHANGE MANAGEMENT

You can now control the versions of forms and manage their changes in this release. A new **General** tab has been added to the Form Settings window that allows you to turn on versioning and/or track the change management of a form.



You may need to track versions of a form and be able to see that all users are currently using the same version. You can now save separate versions of the same form so you can make changes without affecting a published form and view all changes between the form saves.

The New Select Version drop down list is used to select the version of the form you want to view or edit. The filled in bookmark indicates which version is published.



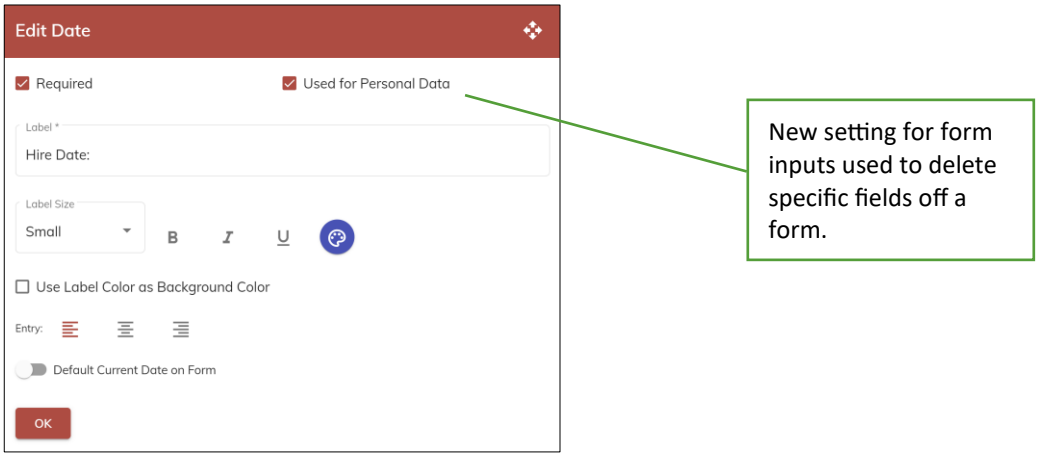
In addition, your business may follow policies and procedures for changes and needs visibility to those changes. You can now track the changes that have been made to a form and view those changes in a Change Log. This log shows the date/time of the change, the type of change, and the details of the change.

FORM AND SUBMISSION DELETIONS

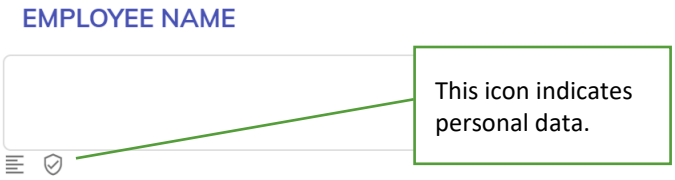
You can now delete forms, submissions, pending submissions and private information. Previously when a form was deleted, the data associated with it remained and had to be deleted through the database. Now when a form is deleted and submissions exist for it, this data is deleted.

Search through forms using a keyword, to delete all data related to the keyword and delete entire forms and the data associated with that form. In addition, you can delete submissions and pending submissions.

A new **Used for Personal Data** setting has been added to Text, Date, Long Text, Number, GPS Coordinates, Images/Attachments, Images, Checkboxes, Radio Buttons, Signatures, Select, Lookup inputs, and the Format Data Set Data window. This setting is used to delete specific data from a form. By checking this option, non-personal data is kept for analysis, while deleting the personal data.



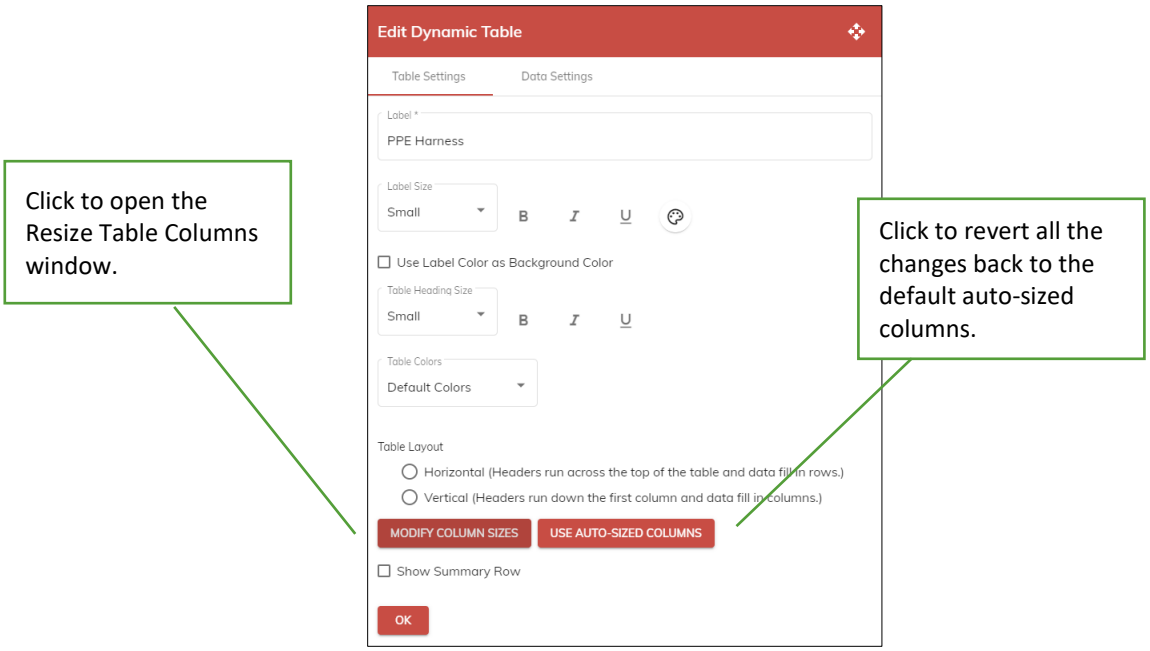
After marking the **Used for Personal Data** setting on an input, a "personal data" icon will appear to the right of the text alignment icon in the Admin site.



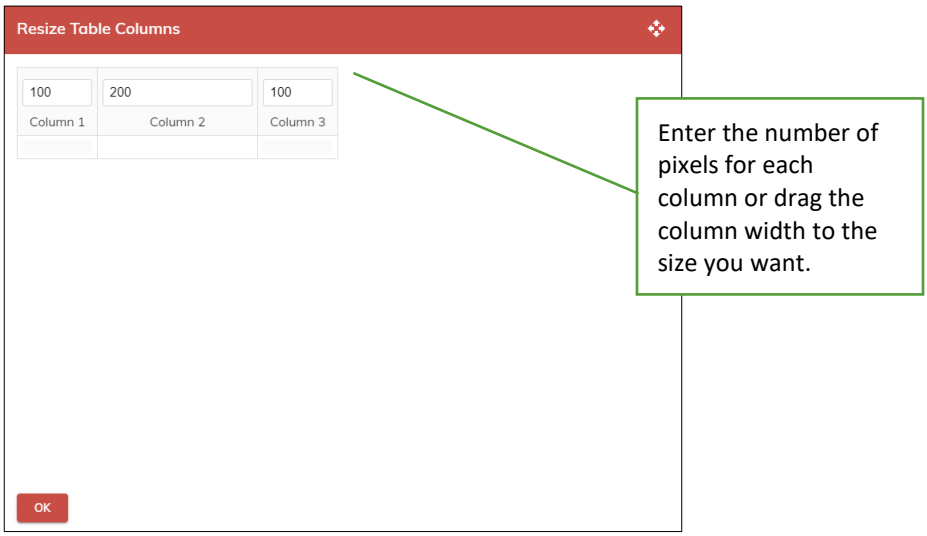
DEFINE COLUMN WIDTH IN DYNAMIC AND STATIC TABLES

The **Modify Column Sizes** button has been added to the Edit Dynamic Table and Edit Static Table windows so that you can specify the width of a column, rather than using the default auto-sized columns.

NOTE If the Table Layout field is set to Vertical, the Modify Column Sizes and Use Auto-Sized Columns buttons are disabled.



Click the **Modify Column Sizes** button to open the Resize Table Columns window. This window displays a "preview" table where there is a number field at the top of the table header where you can enter a pixel number, or you can drag the column width to the size you want.

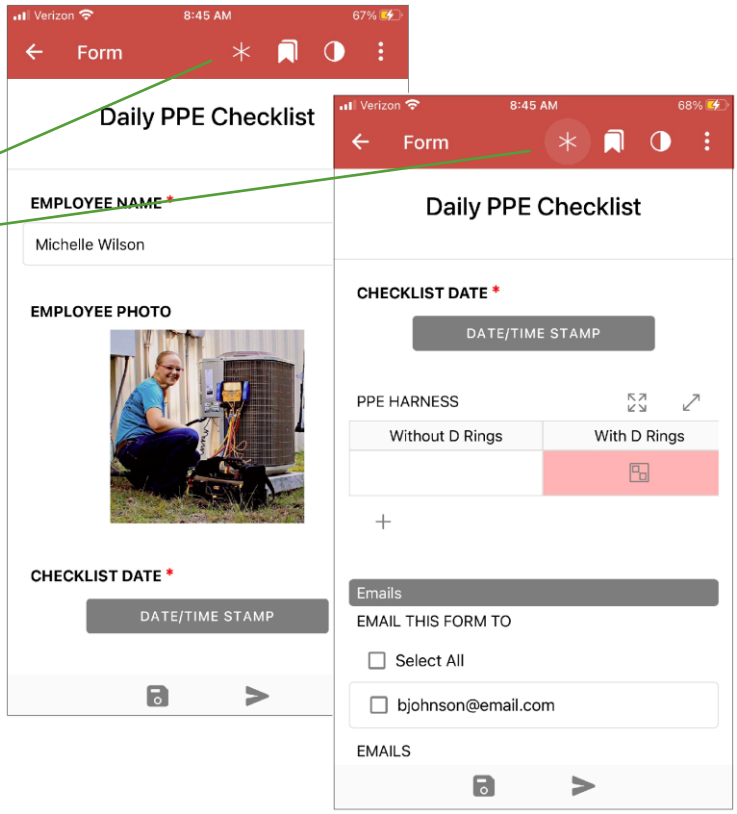


If you want to revert the changes you've made, click the **Use Auto-Sized Columns** button in the Edit Dynamic Table or Edit Static Table windows. Once the columns are reverted, this button is disabled again until you click the Modify Column Sizes button.

HIDE ALL BUT INCOMPLETE REQUIRED FIELDS

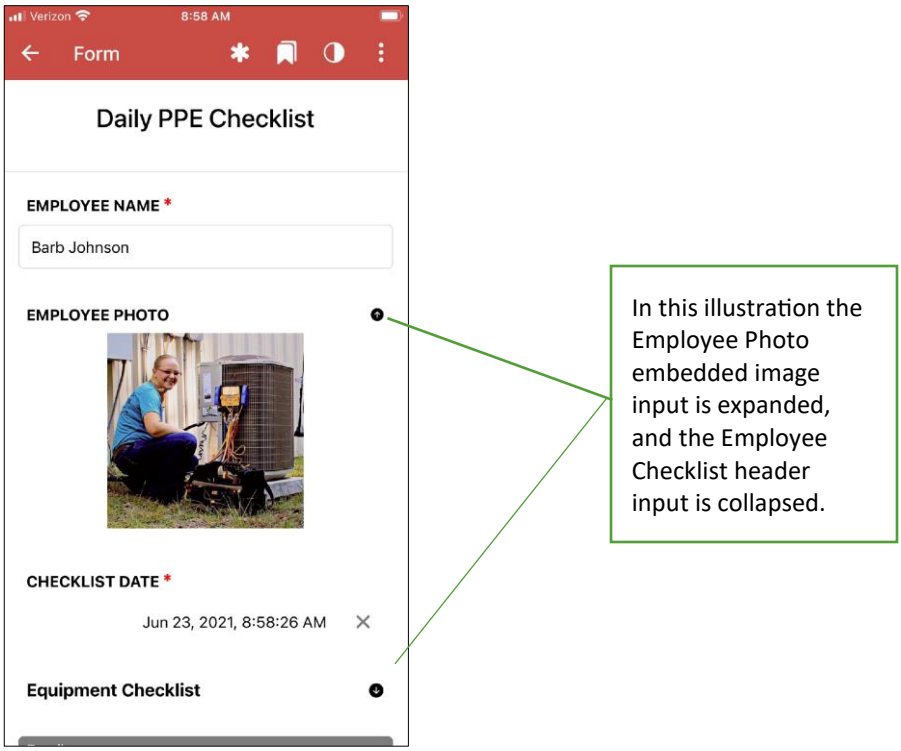
To complete work more efficiently, an asterisk button has been added to the app header to change the display to show only incomplete, required fields on a form in the app. For example, you may have multiple forms that list similar tasks. A technician ticks through the different tasks and may be recording additional information and need to see what they have left to complete on a form.

Click the asterisk to display the incomplete required fields that remain on a form. The asterisk has a shaded circle around it when the form displays the incomplete required fields.

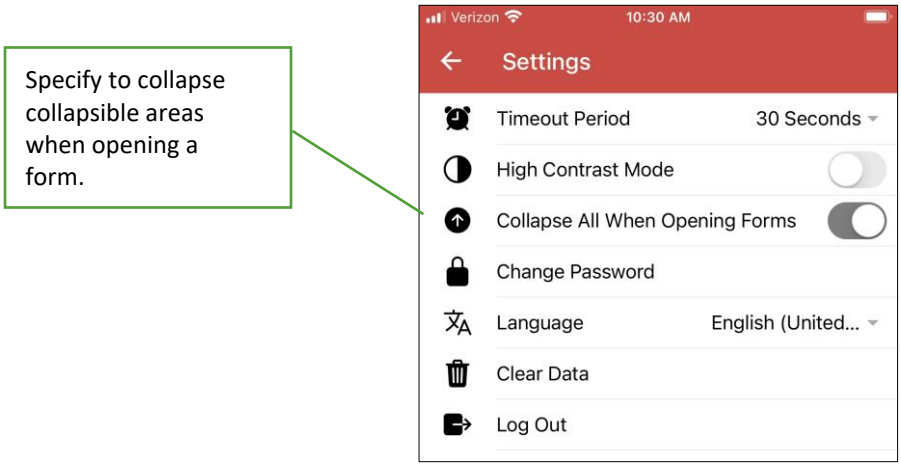


EXPAND/COLLAPSE PARAGRAPHS, EMBEDDED IMAGES, HEADERS, AND SECTIONS

The ability to expand/collapse paragraphs, embedded images, headers and sections has been added in this release. A label field has been added to the Edit Paragraph and Edit Embedded Image windows so there is a place to “anchor” the expand/collapse button. A button has been added to the header line to expand/collapse the information following a header.



In addition, there is a new Collapse All When Opening Forms setting on the Settings page in the app. This allows you to always open forms with collapsible areas collapsed or expanded.



CONDITIONALLY REQUIRE ENTRIES IN A TABLE

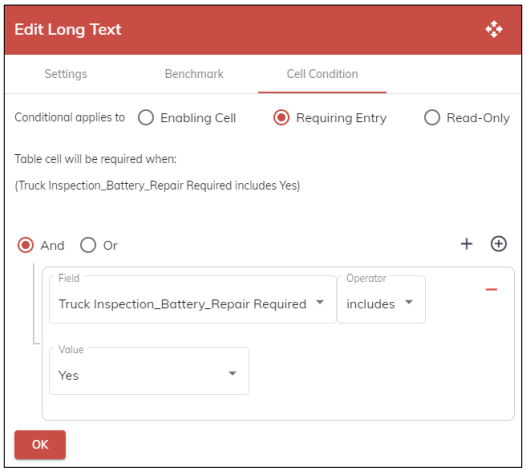
Cell condition options have been added to the field types for dynamic and static tables to conditionally require entries:

Enabling Cell Select to enable a table cell based on a condition.

Requiring Entry Select to have a cell required based on a condition. When the condition is met, the field must have an entry to submit the form. If the condition is not met, the field must also be enabled for optional entry.

When the Requiring entry option is marked on the Cell Conditions tab it overrides the Required marked on the Settings tab.

Read-Only Select to conditionally show fields that aren't editable. There may instances where data is part of a data set that needs to be shown but is disabled in a condition. This is like a required field, where it is automatically shown but in read-only mode.



DATA SET EMAIL FIELDS

In this release you can now detect email values from fields that have data sets applied to them. The email can be set to appear in the Emails section of the FormsPro app when emailing submitted forms.

CONDITIONAL DATA MAPS

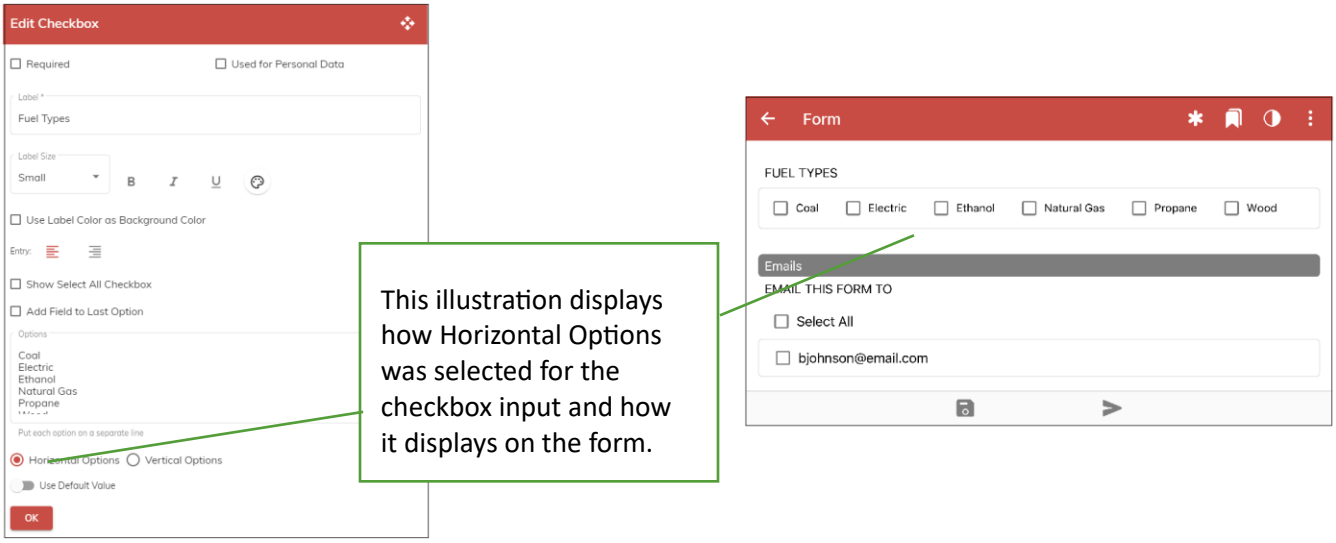
You can now set up multiple, different maps that run based on conditions in form answers. The data is then sent to the appropriate integration.

SUB-TABLE INDICATORS

Indicators have been added to dynamic and static sub-tables to signify a required field and that an entry in a sub-table exists. If a field in a sub-table is required, the cell in the parent table that opens the sub-table is colored red. An icon has also been added to indicate when there is an entry in a sub-table.

HORIZONTAL OPTION FOR RADIO BUTTONS/CHECKBOX

You can now display checkboxes and radio buttons horizontally or vertically, providing more flexibility with form design.

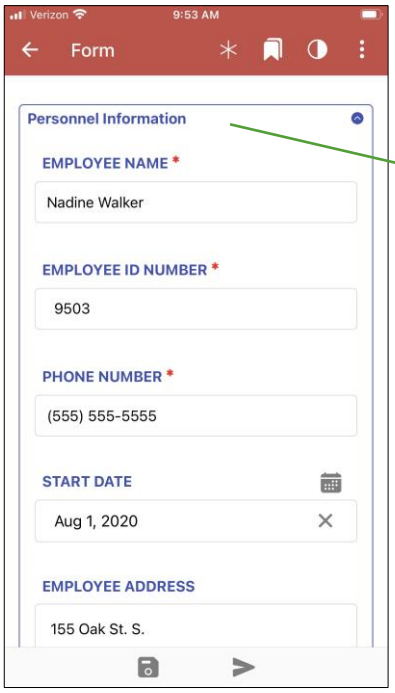


This illustration displays how Horizontal Options was selected for the checkbox input and how it displays on the form.

REUSABLE SECTIONS

You may have information that would be beneficial to use on several forms. In this release you can create a form section one time and use it across multiple forms. The new Section Designer is used to create a reusable section that groups several fields that are saved together to add to any form. Sections can contain any input type, except page breaks, and can contain or be in conditional fields.

When a section is added to a form the section is displayed with a box around it to indicate it's part of a section, and not individual fields on a form.



The section appears under the header with the label that was entered in the Edit Section window.

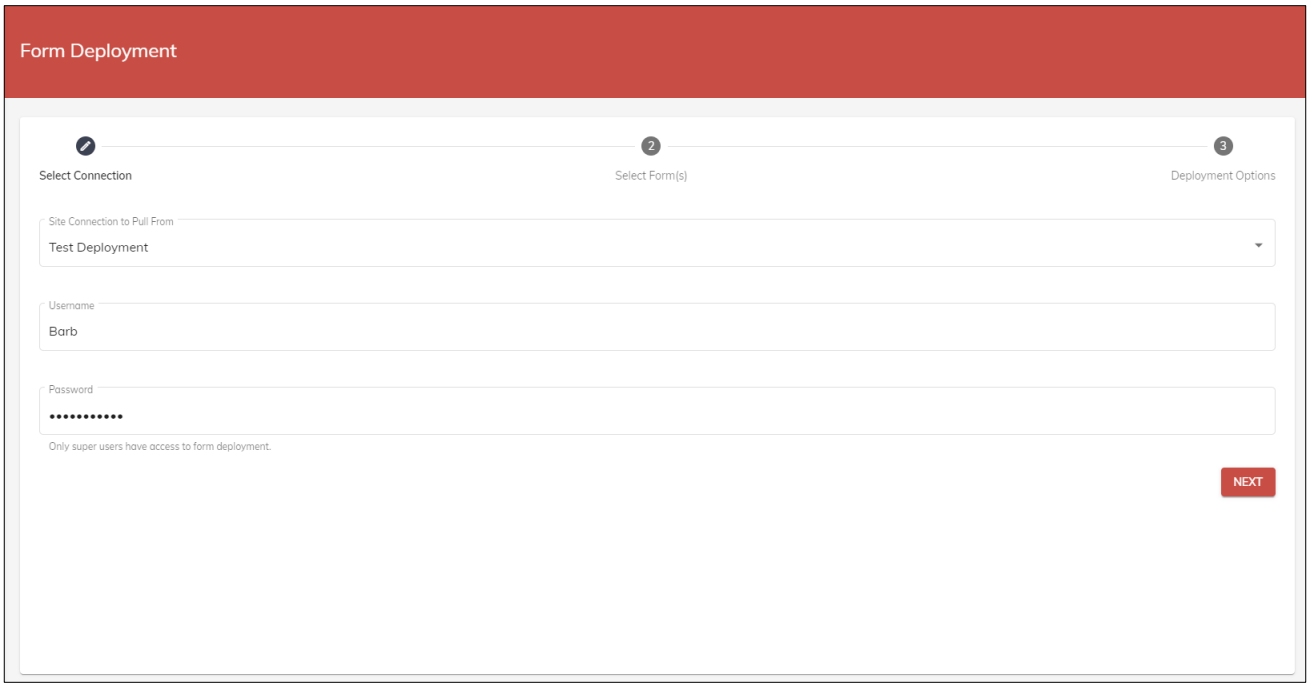
DEPLOY FORMS

You can now deploy your forms, and everything related to it from site to site. For example, let's say you have a "Test" site to create and test your forms, reports, data mapping, and submissions. Then, when you're ready to begin using the form, you can deploy it to a "Production" site, without having to reset dynamic fields or integration information.

To deploy forms, you need to set up a deployment connection type in the Connection window for the site you're pulling the forms from.

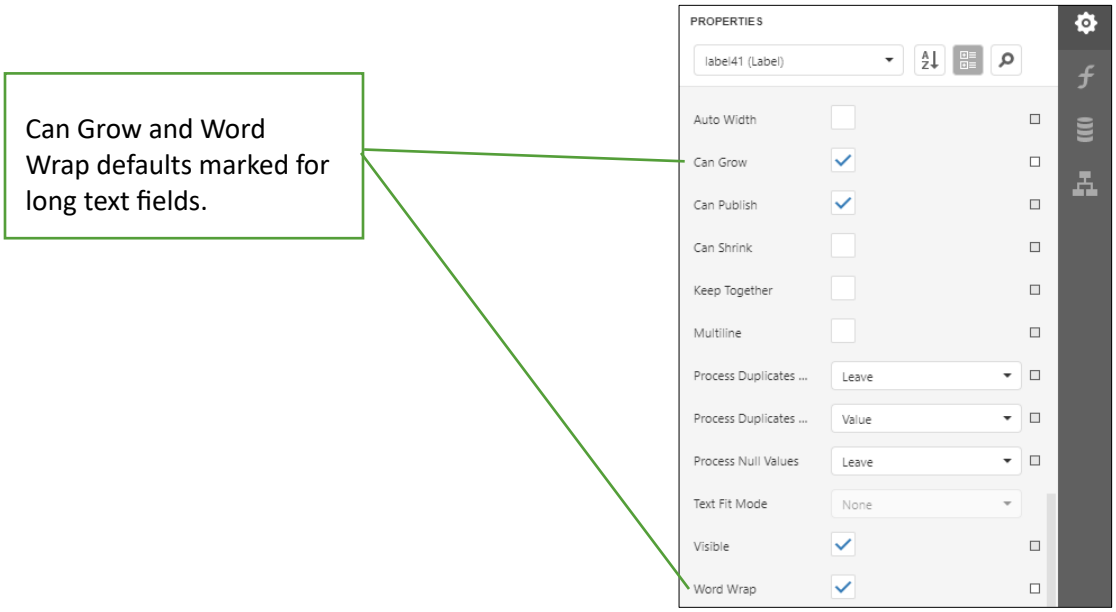
Then you select the forms to deploy and select a folder for them in the new site.

After a form has been deployed, you can view the submission in the Deployment Log.



REPORT ENHANCEMENTS

The **Can Grow** and **Word Wrap** options for long text fields now default marked. This allows the long text cells to increase as needed and text is "wrapped" to the next line if it doesn't fit within the report margin.



APP LANGUAGE AVAILABILITY

Additional languages are now supported in the app. All form text, including form names, questions, responses, and things outside of forms such as work order notes and notifications, display in the language in which it was written. Additionally, the language selected will determine date formatting, so be sure to choose the appropriate English version for your region.

MAINTENANCE AND FIXES

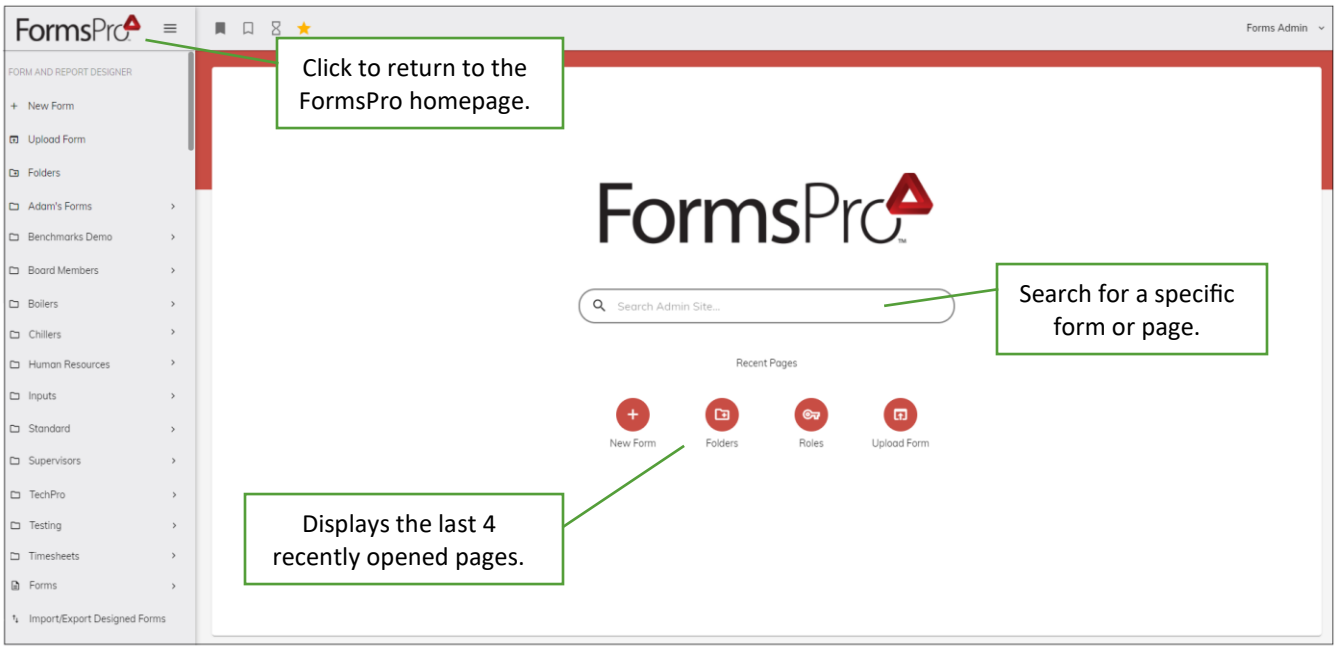
As with most releases, we've performed maintenance on the Admin Designer and mobile app and fixed reported issues. If you have a specific question about a fix, please contact support@omnibyte.com.

IN CASE YOU MISSED IT, WHAT'S NEW IN 4.3.1

Many new features have been added. You can find more information in the documentation for these features using the links provided. Contact us at support@omnibyte.com if you have any questions about any of these features.

FORMSPRO HOMEPAGE

In this release, a new FormsPro homepage has been added. This page opens after logging into FormsPro and serves as a "landing" page for the Admin site.



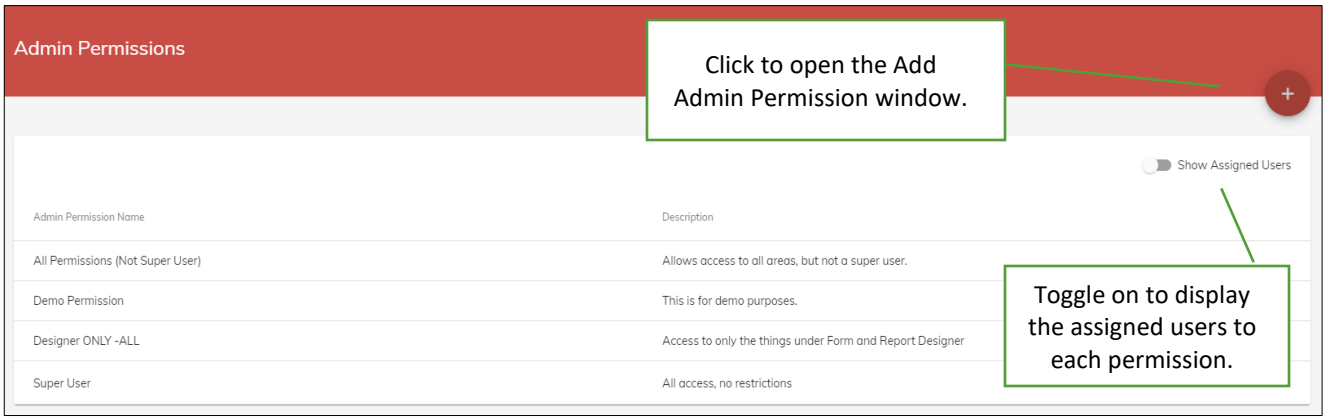
Use the FormsPro homepage to perform a search and easily navigate to a specific form or page. This page also displays the name of the four most recently opened pages that you can click to open that page directly. If you leave the FormsPro homepage, click the FormsPro icon in the upper left-hand corner to return to it.

ADMINISTRATIVE PERMISSIONS

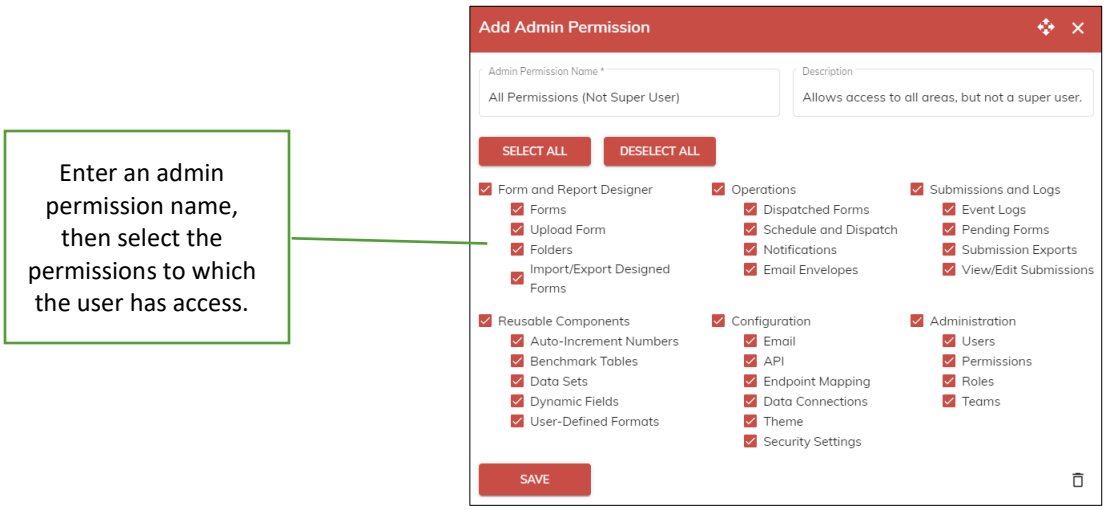
Administrative permissions have been added in the Admin site. Admin permissions allow you to specify the access each user has to the areas in the Admin site.

The Super User permission is provided and has all administrative permissions, as well as access to all folders regardless of folder limit access settings. It cannot be edited or deleted. In addition, the super user is automatically provided access to any new features that are added to FormsPro in the future. We recommend that a Super User permission is assigned to at least one administrator.

The new Admin Permissions page displays the permissions that have been set up.



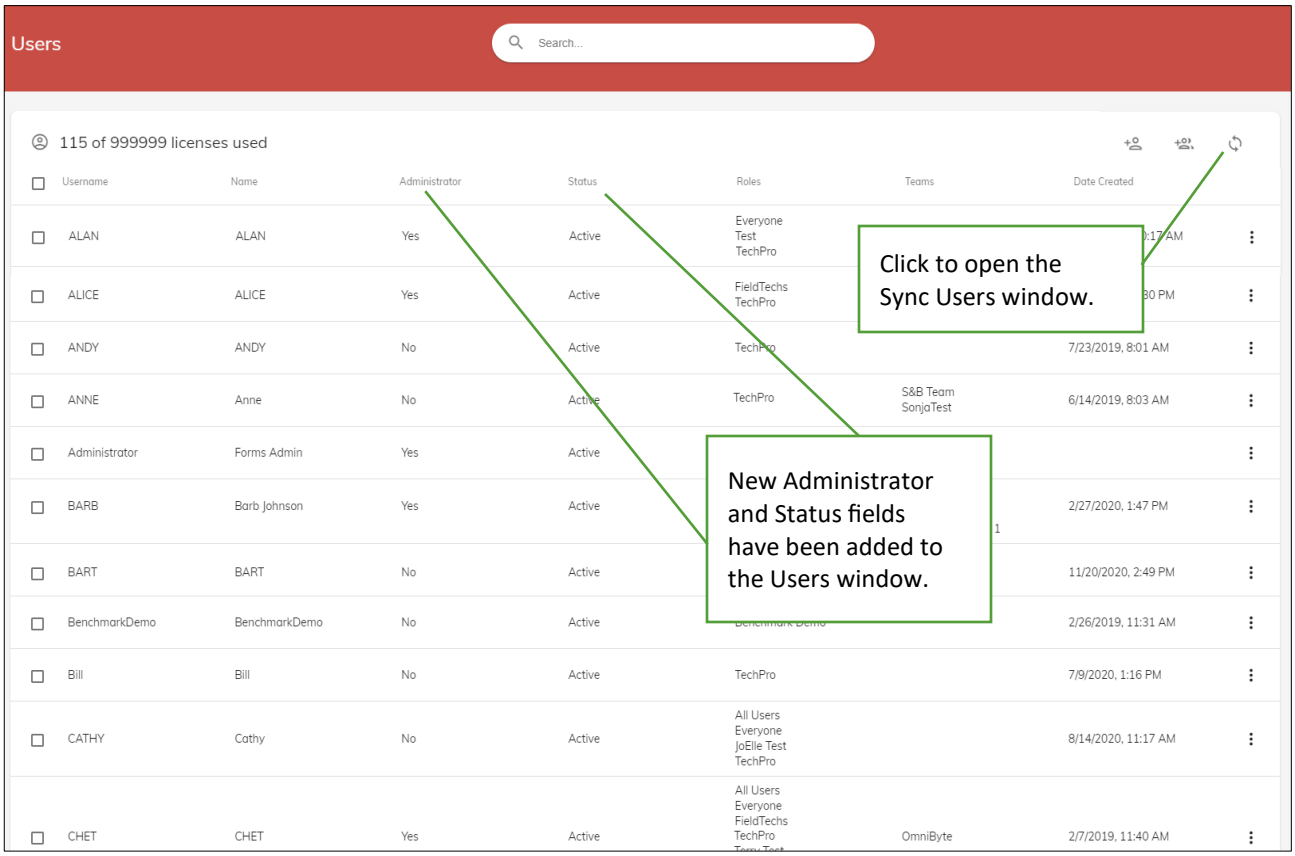
Click the Add button to open the Add Admin Permission window to set up and specify admin permissions. The options in this window are organized by the FormsPro menu on the left-hand side.



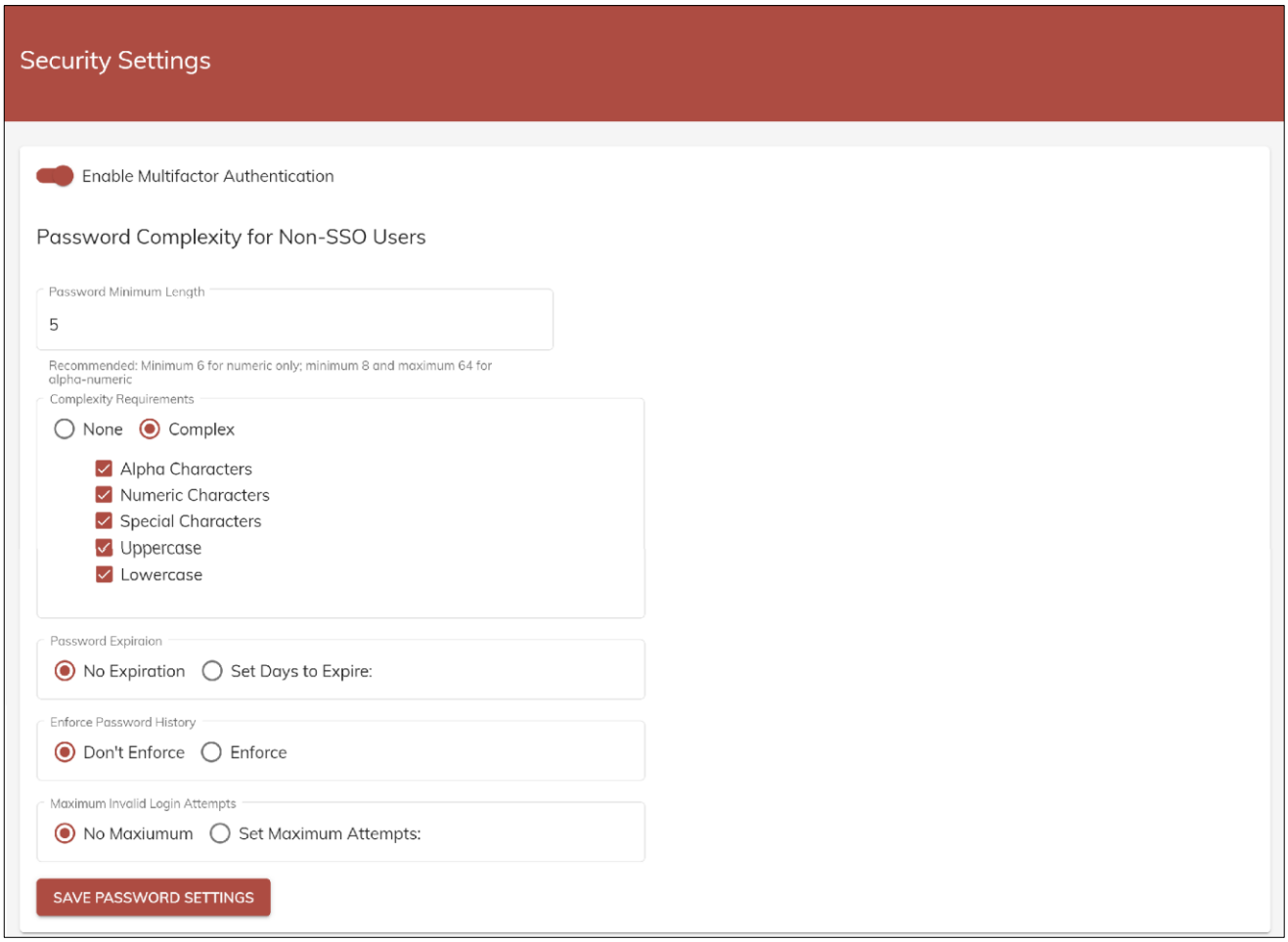
You can limit who has access to a folder by toggling the **Limit Folder Access** option on in the Add Folder and Edit Folder windows. Then select the users and/or teams for whom you want to limit access.

USER MANAGEMENT AND PASSWORDS

This release provides you with more flexibility in handling security and passwords. You can now set up password security using Azure Active Directory (AD) for Single Sign-On (SSO), and Multifactor Authentication (MFA). The Administrator and Status columns have been added to the Users page so that you can easily see which users have access to the FormsPro Admin Site along with their license status. The Sync Users button opens a new Sync Users window, where you can retrieve the information needed to get the FormsPro users from Azure AD so they can begin using forms immediately.

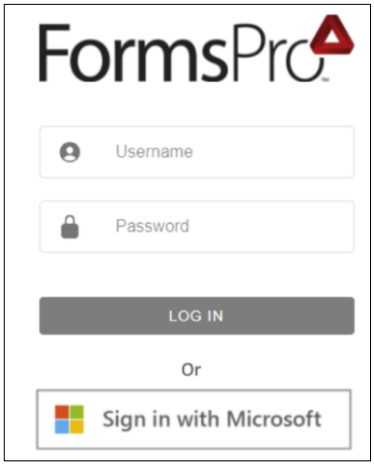


A new Security Settings page has been added in this release. This allows an administrator to have more control and options with FormsPro security. It allows you to use multifactor authentication, Azure AD for SSO and set up password information for non-SSO users.



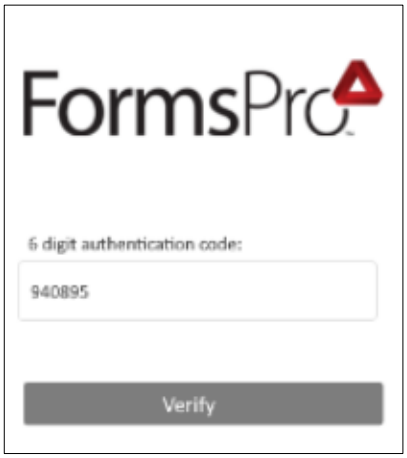
LOGGING INTO FORMSPRO APP

Single Sign-On Via Azure When logging into the FormsPro app, there is a new Sign in with Microsoft button, which directs you to your organization's sign in flow which is configured by Azure.



After tapping the **Sign in with Microsoft** button, you will be asked to enter your username and password. A code will be sent to you via a text message or email that you need to enter for verification. Then FormsPro will open and sync.

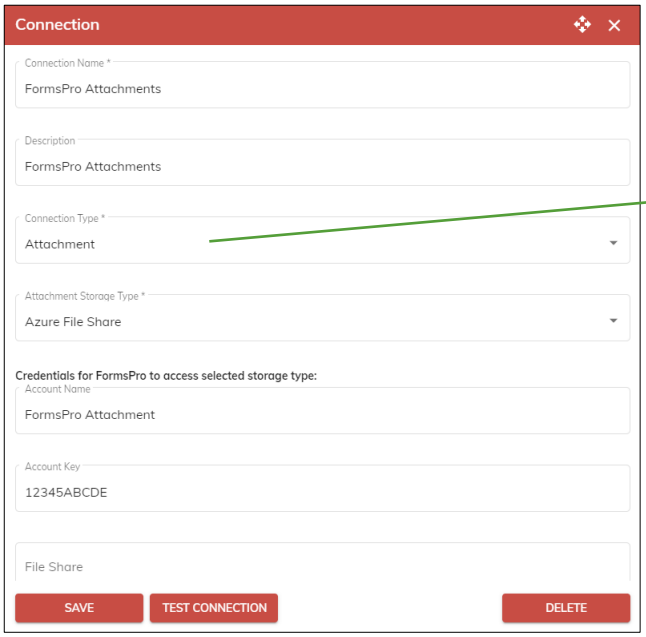
Multifactor Authentication MFA uses a one-time password (OTP) in addition to your username and password to ensure who you are when logging into FormsPro. To facilitate this, FormsPro has implemented a time-based one-time password (TOTP) system for multifactor authentication. TOTP is a temporary passcode computer algorithm that generates an OPT that uses the current time of day as its authentication factor. You will need to have either a Microsoft authenticator or Google authenticator installed on your device. When multifactor authentication is enabled, the TOTP is shared with the multifactor app on your device, either by a QR code or email link. After scanning the QR code, or clicking the link, the app shows the one-time password to use. Log into FormsPro using your username and password, then enter the authentication code.



ATTACHMENT AND IMAGE ENHANCEMENTS

You may need to associate important information with forms data that goes beyond photo images. This release allows you to add attachments and submit those with a form. You can also send the attachments to another system, such as your field service management software after the form is submitted.

A new connection type has been added for attachments. Until you have set up an attachment connection, you will not be able add any attachment files or video files.



The Attachment connection type has been added to the Connection window. Standard license users only have this connection type.

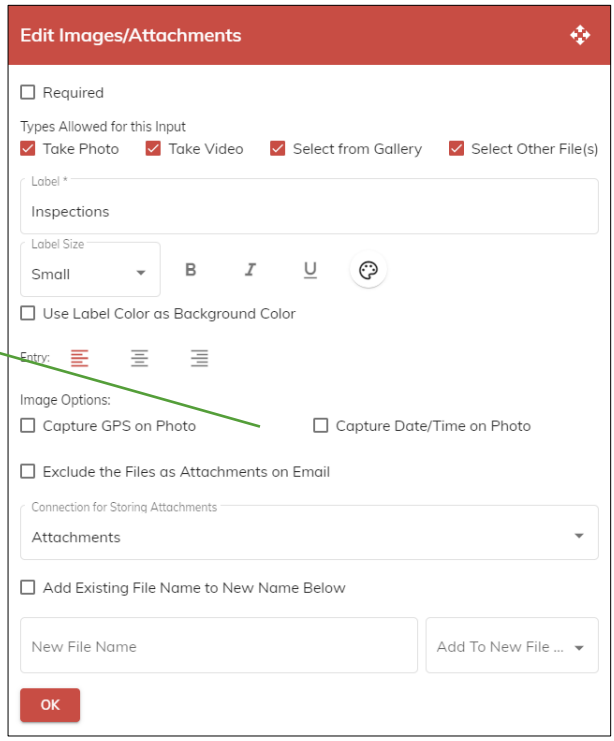
Once an attachment connection type has been set up, use the Images/Attachments input to add it to a form. Click the edit icon to open the Edit Images/Attachment window to specify settings for the attachment.

In addition to attachments, this release includes several enhancements to images. You can now capture GPS coordinates and the date and time a photo was taken. This is useful to verify the time and location of when and where the image was taken. You can also specify the type of image or attachment the app user can use as an input. For example, you could mark only Take Photo to ensure a new picture is taken and an existing one is not used from the device's gallery.

Select the type of attachment for the form input.

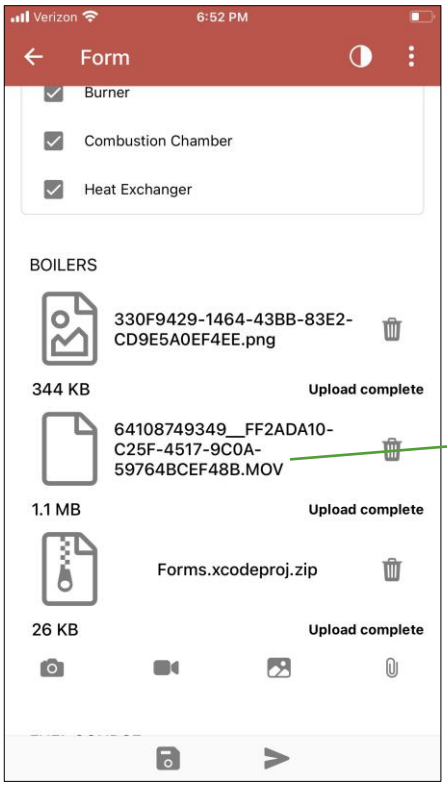
Specify if you want to include GPS and date/time information on a photo.

Specify if you want to exclude the attachments on an email and add the existing file name to replace a file name.



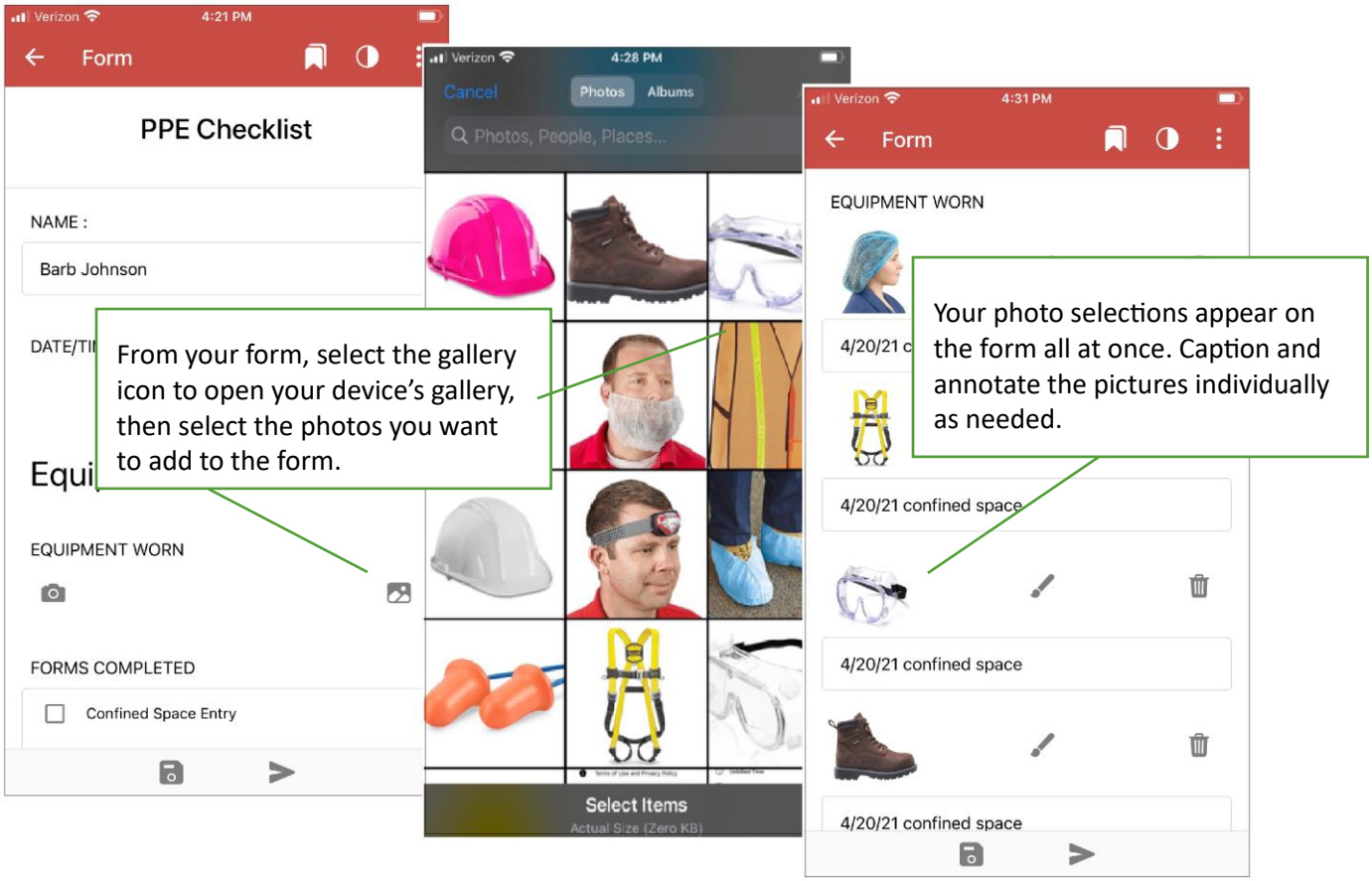
In the FormsPro app, the GPS and date/time information are displayed in the corners of the image. The file type size, and original file name is displayed on the form.

The GPS coordinates and time/date information are included on the image. This information can be displayed in the upper right or lower left corner. This information also prints on the report.



File types including images and videos can be attached to a form. The file size and its original file name is displayed on the form. The file name specified in the Edit Images/Attachments appears in the folder where the attachment is stored.

You can also now attach multiple photos to a form at once, rather than one photo at a time.



From your form, select the gallery icon to open your device's gallery, then select the photos you want to add to the form.

Your photo selections appear on the form all at once. Caption and annotate the pictures individually as needed.

DYNAMIC FIELD ENHANCEMENTS

When making changes to a form using the Edit Submitted Forms window, original entries/selections from dynamic fields are retained. The data is *not* reassociated with the administrator user. For example, let's say you have a dynamic field of Current User on a form. Barb was the original user who submitted the form. Now Laura, the admin user, needs to edit the form. Barb will still be the current user even after Laura makes her changes.

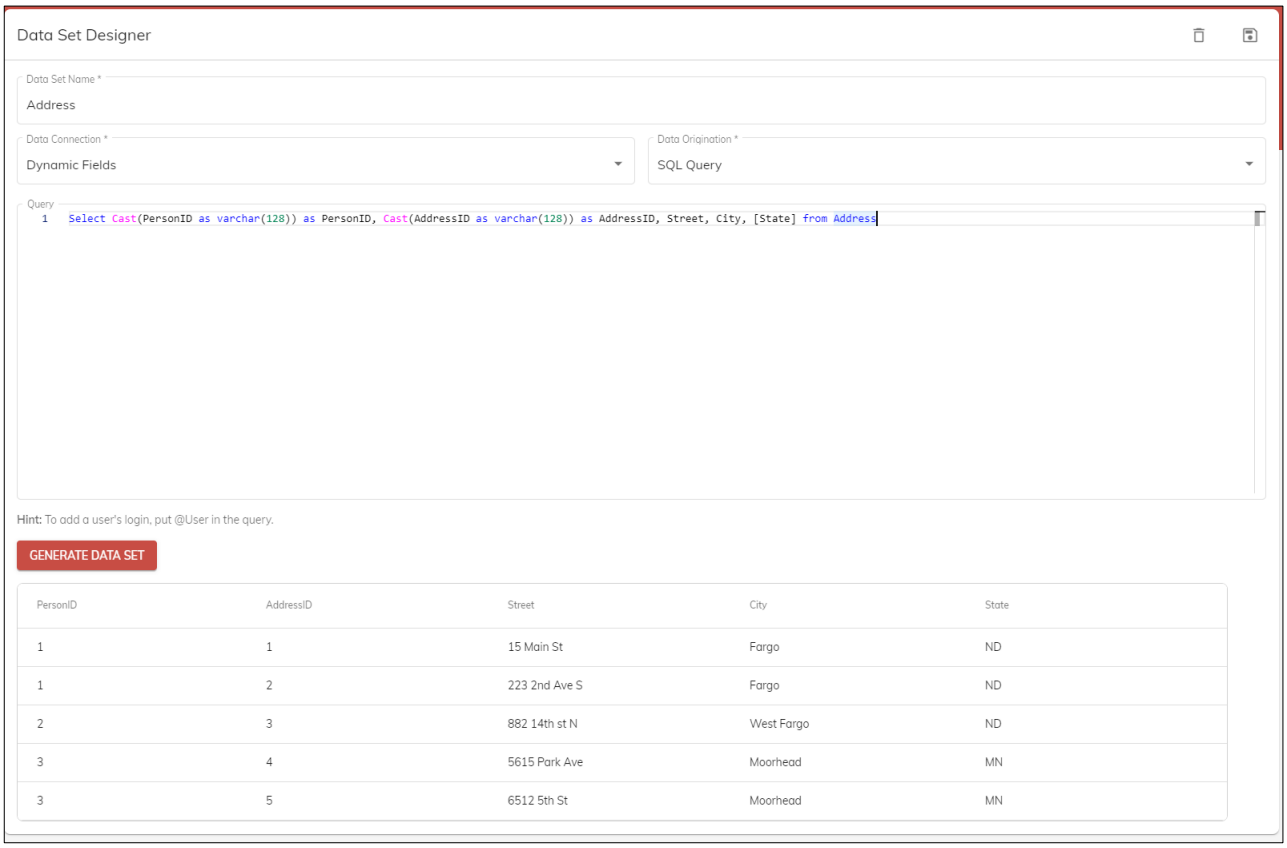
You can now copy dynamic fields. This is especially helpful if you have similar dynamic fields with slightly different requirements. By copying the dynamic field, you can use it as a template and make the needed changes to the newly copied dynamic field.

DATA SETS AND DYNAMICS TABLE ENHANCMENTS

Data sets allow you to populate a grid with all the relevant data from another source applicable to a form. For example, a customer may have 5 contact records. Once the customer is selected on a form, the table would fill with all 5 of these contacts. You need to set up a data connection to retrieve the information from the primary source. Then you create data sets of information that is pulled from that source to be used on a form. You can further define if the fields in the data sets can be viewed or edited when used on a form.

Data sets can also be used when filling a dynamic table.

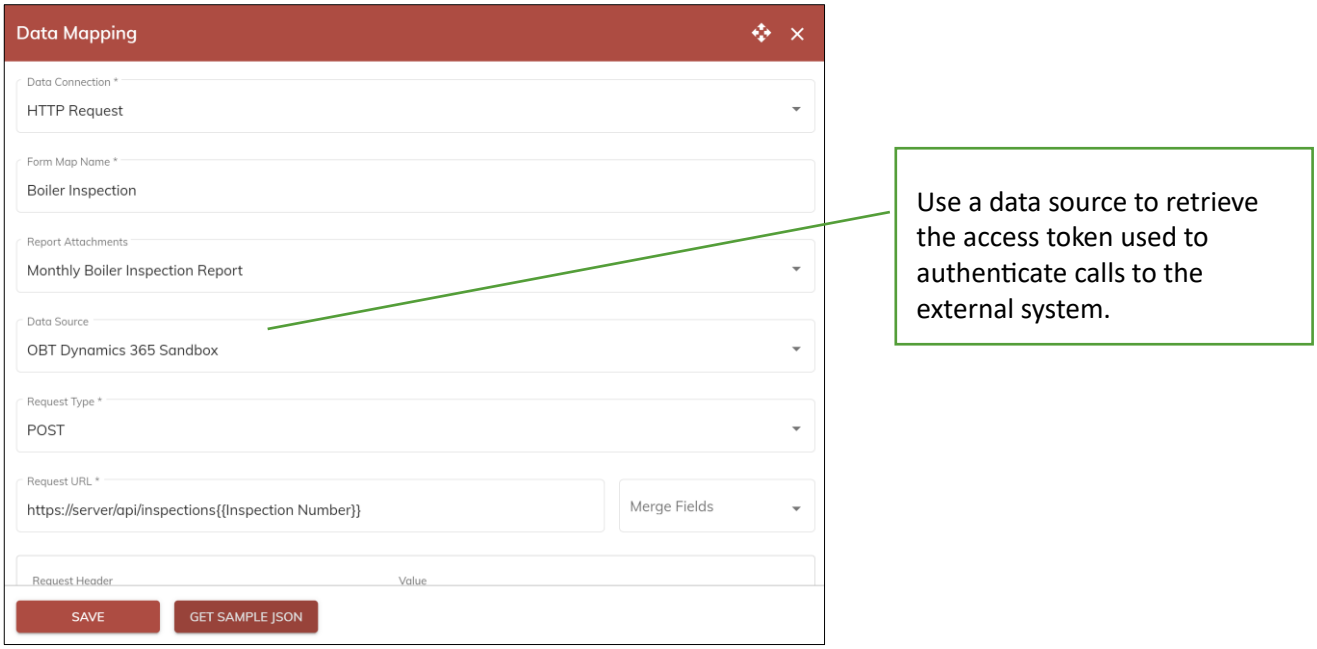
NOTE Data sets are *not* available with standard license types.



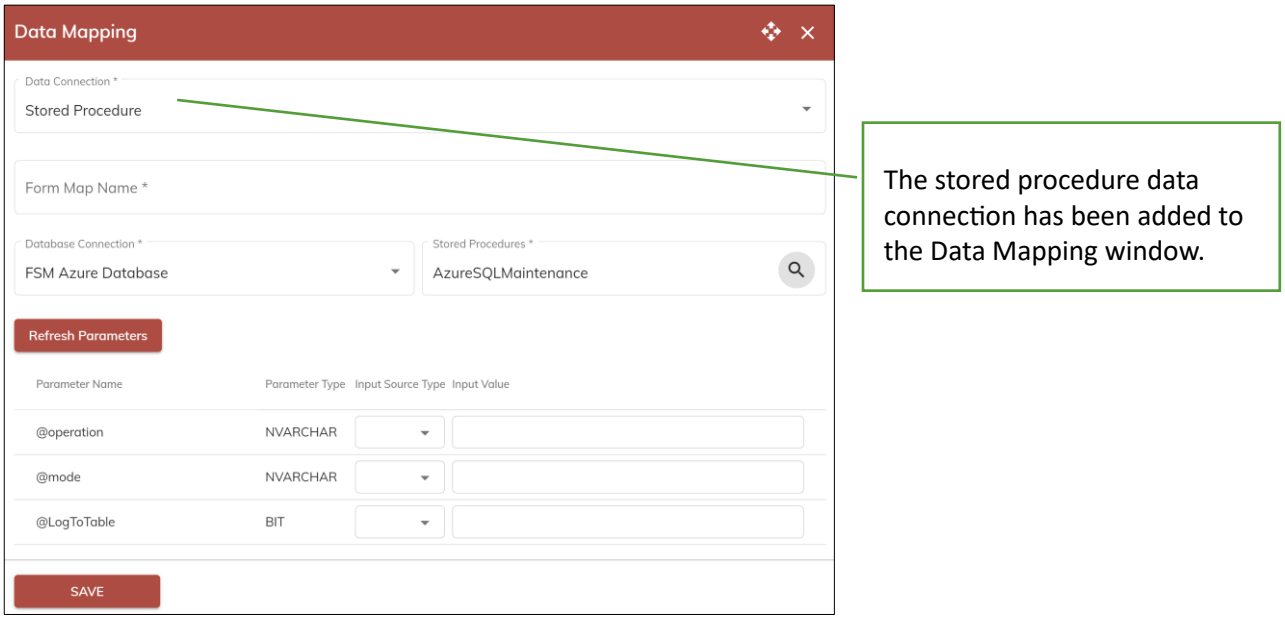
DATA MAPPING ENHANCEMENTS

Several enhancements have been made with data mapping in FormsPro:

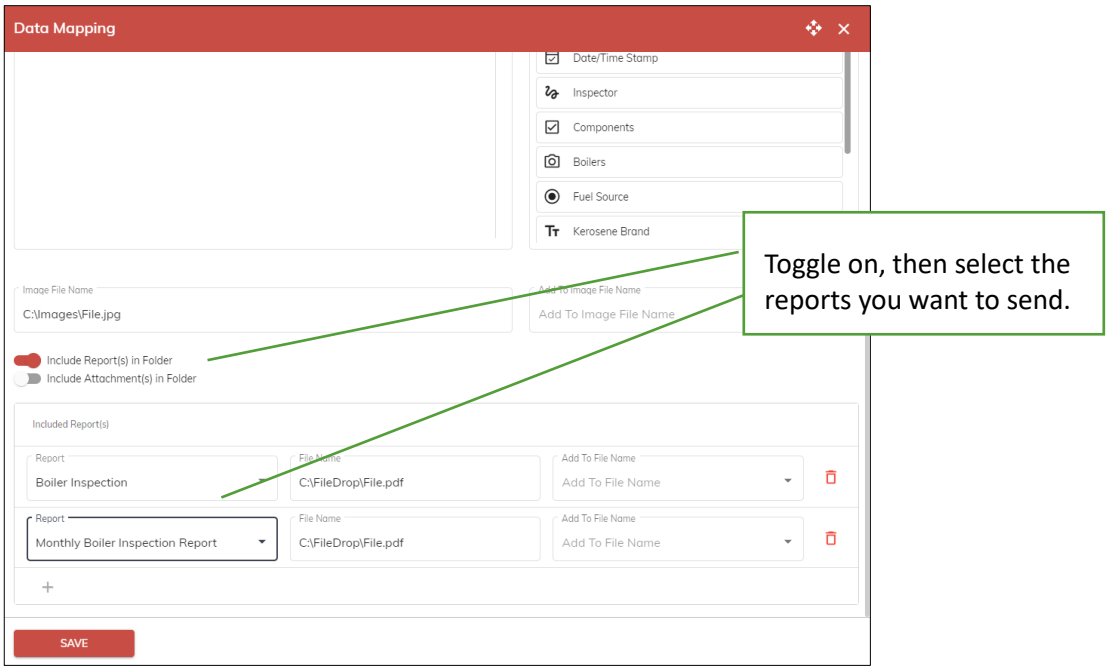
HTTP Data Source When retrieving data from other systems using the HTTP data connection, you can now use the data source to get the access token used to authenticate calls to the external system. With HTTP Request a map attached to a form can call a REST endpoint with support for the important request types such as Post, Patch or Delete. With this integration fields on a form can be mapped directly to fields provided by such an endpoint for inserting new records and updating existing records with changes coming from a form.



Stored Procedure You can now easily integrate FormsPro with other solutions configurable from the FormsPro site by executing stored procedures from your form submissions. Specify the stored procedure content using the Data Mapping window. Any errors returned by the stored procedure are logged in the Data Maps Log.



Multiple Reports through FSM Data Map You can now attach and send multiple reports through the FSM data map. After selecting IFS FSM as the data connection in the Data Mapping window, toggle the Include Report(s) in Folder option on to select which report(s) to send. Enter a filename for the report and define which filename goes with the report.



APP LANGUAGE AVAILABILITY

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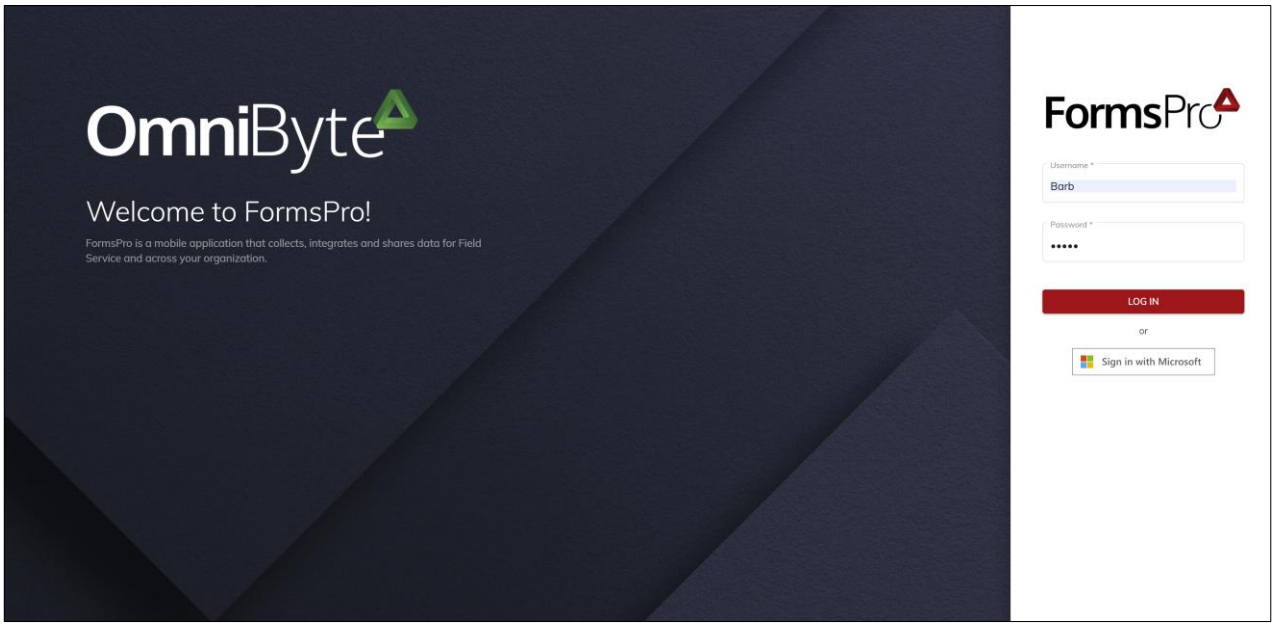
MAINTENANCE AND FIXES

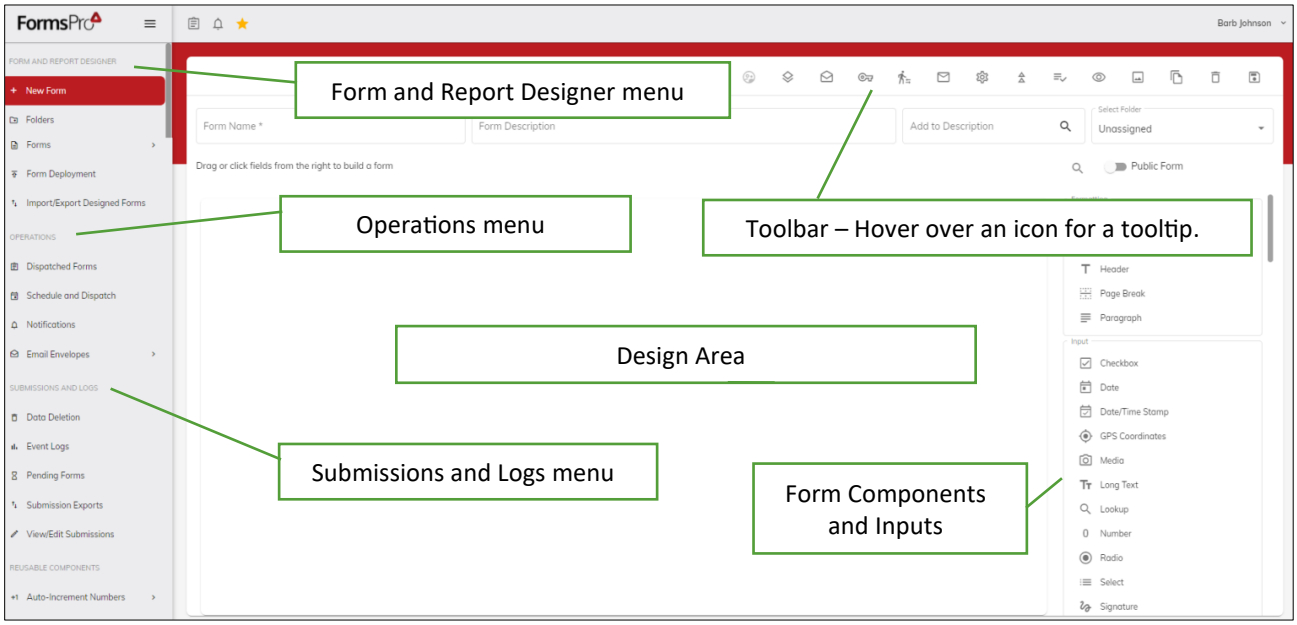
As with most releases, we've performed maintenance on the Admin Designer and mobile app and fixed reported issues. If you have a specific question about a fix, please contact support@omnibyte.com.

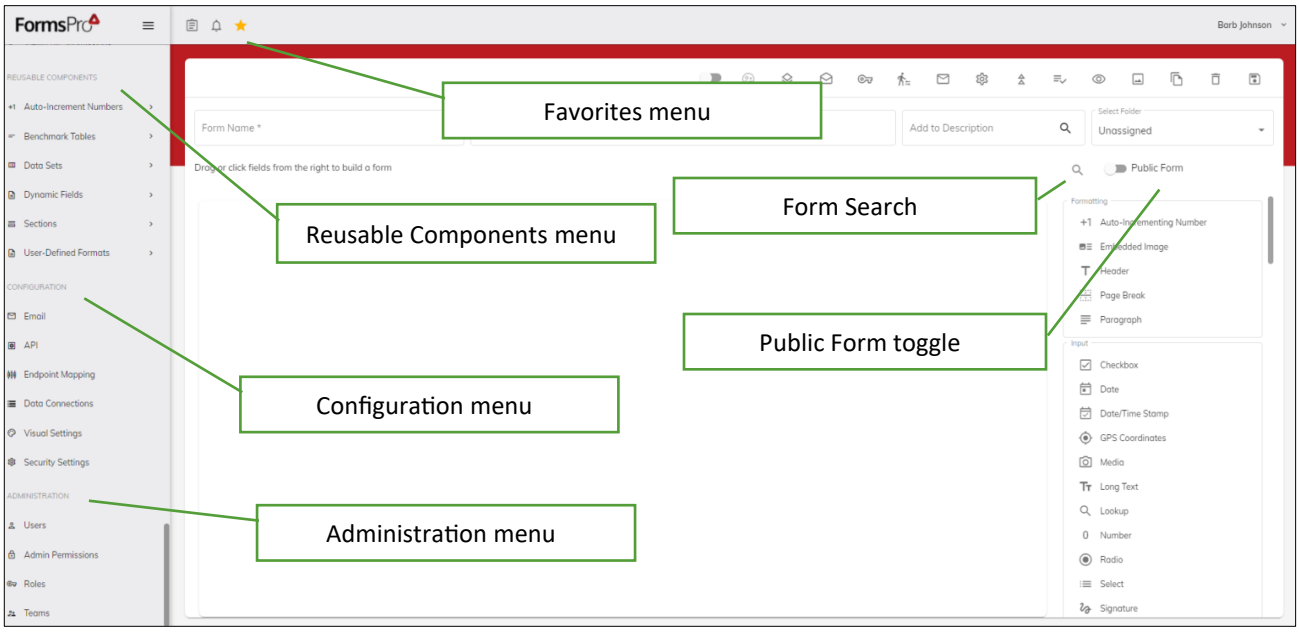
USING THE ADMINISTRATOR SITE

Log into the FormsPro administrator site with the username and password provided to you by OmniByte.



Forms are designed and maintained on the administrator site. This site consists of a forms designer that contains all the components for setting up forms, reports, users, workflow, and emails. The following illustrations display the administrator site's menus and options for advanced forms.





If designing a basic form, the field designer has some different components. The toolbar has fewer options and zoom capabilities and page numbers have been added.

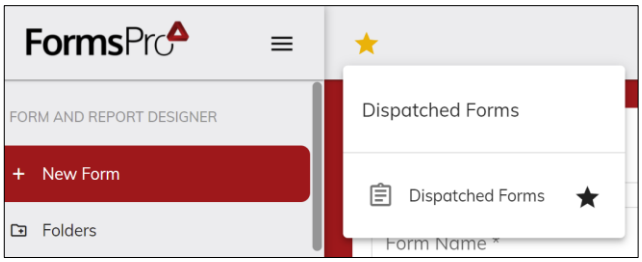
FAVORITES MENU

Use the Favorites menu to easily access the parts of FormsPro you use most often. You can add any FormsPro menu item that has a direct URL to the Favorites menu, such as forms, pages, and windows, but not folders. Once an item is added, its icon appears in front of the star icon for easy accessibility. Simply click on the icon or select the item from the Favorites list that opens when you search.

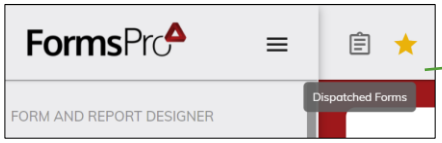
NOTE Favorites are user specific. Only items to which a user has access (via administrative permissions) can be added to the Favorites menu.

ADD A FAVORITE

1. Click ★ (star icon) at the top of the Administrator site.
2. In the **Search** field enter the item you want to add to the Favorites menu.
3. Click ★ (star icon).



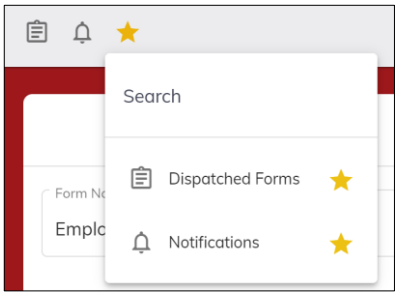
4. The item is added at the top of the Administrator site.



If you hover over the icon of the item, a tool tip is displayed.

DELETE A FAVORITE

1. Click ★ (star icon) at the top of the Administrator site. A list of your favorites is displayed.
2. Click ★ (star icon) next to the item you want to remove.



3. The item is removed from the top of the Administrator site.

FORMSPRO ADMIN MENU

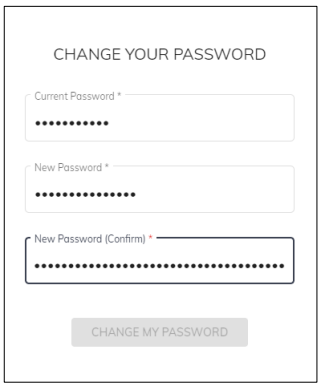
The FormsPro Admin menu opens the About FormsPro page, Change Password window, Language menu, Registration Key window, Help and Resources page and where you log out from FormsPro.

ABOUT FORMSPRO

The About FormsPro page describes the features and functionality of the product, provides a link to the Terms of Use and Privacy Policy information and a link to the Software License Agreement. It also displays the version number of the Admin site.

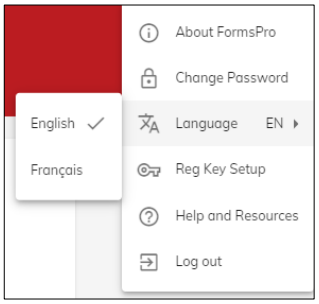
CHANGE PASSWORD

The Change Your Password window is used to change the password for the user currently logged into the Admin site.



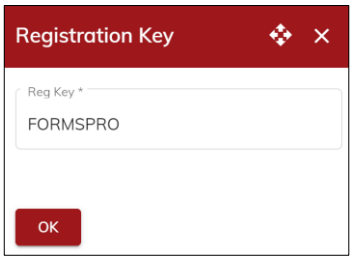
LANGUAGE

The Language menu option allows you to select the language you want to use in the admin site. English and French are the currently supported languages.



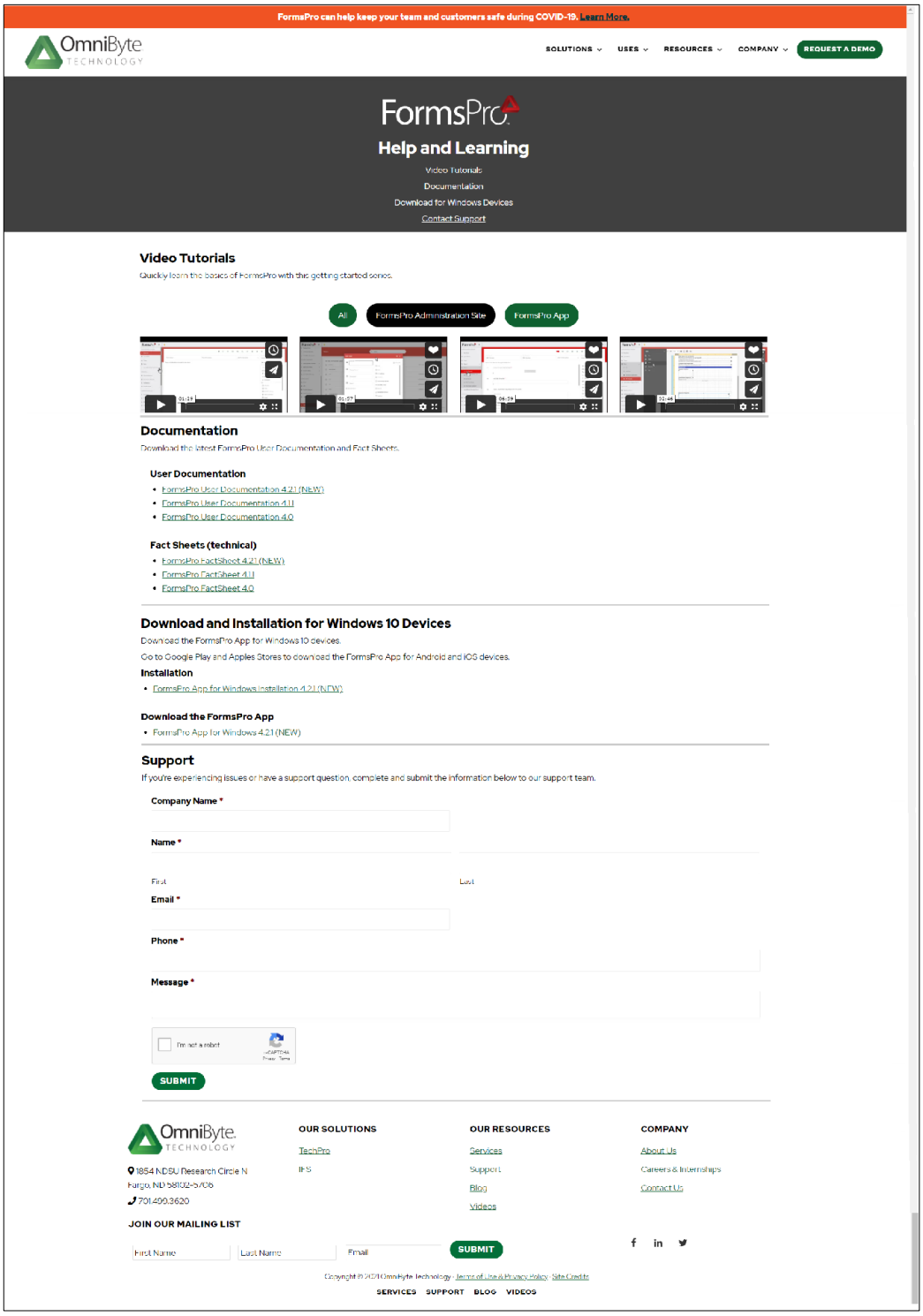
REGISTRATION KEY

The Registration Key window is where you enter the FormsPro registration key that OmniByte provided to you.



HELP AND RESOURCES

The Help and Resources window provides video tutorials to learn the basics of FormsPro, links to the documentation, installation, and support submissions, along with OmniByte company information.



LOG OUT

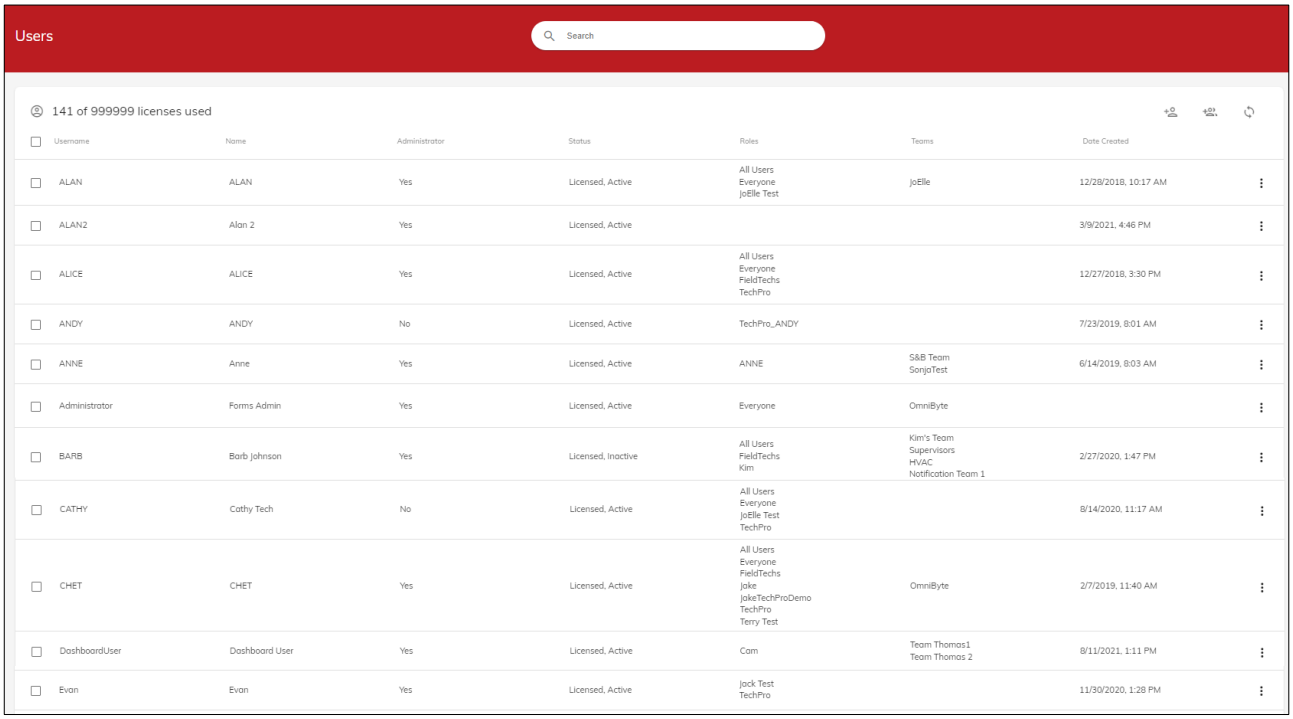
The Log out menu option logs you out of FormsPro.

ADMINISTRATION MENU

Use the Administration menu to set up users, admin permissions, roles, and teams.

USERS

Before creating forms, it is a good idea to set up your users. This can be done later, but until you have users and roles set up, the forms you create cannot be accessed by anyone. Open the Users page by clicking **Users** from the **Administration** menu.



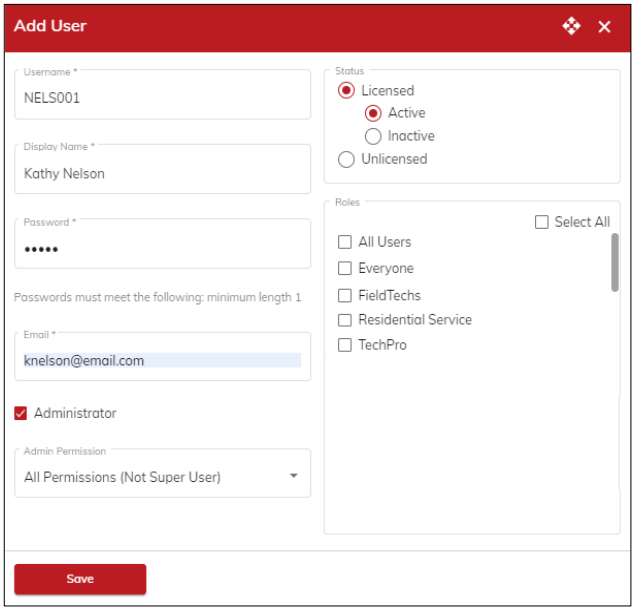
Username	Name	Administrator	Status	Roles	Teams	Date Created
ALAN	ALAN	Yes	Licensed, Active	All Users Everyone JoElle Test	JoElle	12/28/2018, 10:17 AM
ALAN2	Alan 2	Yes	Licensed, Active			3/9/2021, 4:46 PM
ALICE	ALICE	Yes	Licensed, Active	All Users Everyone FieldTechs TechPro		12/27/2018, 3:30 PM
ANDY	ANDY	No	Licensed, Active	TechPro_ANDY		7/23/2019, 8:01 AM
ANNE	Anne	Yes	Licensed, Active	ANNE	S&B Team SonjaTest	6/14/2019, 8:03 AM
Administrator	Forms Admin	Yes	Licensed, Active	Everyone	OmniByte	
BARB	Barb Johnson	Yes	Licensed, Inactive	All Users FieldTechs Kim	Kim's Team Supervisors HVAC Notification Team 1	2/27/2020, 1:47 PM
CATHY	Cathy Tech	No	Licensed, Active	All Users Everyone JoElle Test TechPro		8/14/2020, 11:17 AM
CHET	CHET	Yes	Licensed, Active	All Users Everyone FieldTechs Jake JakeTechProDemo TechPro Terry Test	OmniByte	2/7/2019, 11:40 AM
DashboardUser	Dashboard User	Yes	Licensed, Active	Cam	Team Thomas1 Team Thomas 2	8/11/2021, 1:11 PM
Evan	Evan	Yes	Licensed, Active	Jack Test TechPro		11/30/2020, 1:28 PM

The Users page lists the users that are set up in the system. Click any user in the list and edit their settings. You can only mass update active or inactive users. Unlicensed users need to be updated individually.

SET UP USERS

Users are the people in your organization using FormsPro. Everyone using the administrator site and/or the FormsPro mobile app need to be set up as users.

1. From the **Administration** menu, click **Users** to open the Users page. In the upper right, click (Add User). The Add User window appears.



2. Enter a username and display name for the user you are setting up. The username is for signing into FormsPro on the device or the FormsPro administrator site for administrators (if you use both, the same username can be used). The display name is shown on the other pages and windows on the administrator site.
3. Create a default password for the user to use when logging in. We recommend that users change their password after the initial login.
4. Enter an email address. Emails are required and are used on the email setup for a form.
5. If this user will be using the administrator site, mark **Administrator**. The Permission field becomes enabled. Select the permission type for the user.

   If the Administrator option is not marked, this user cannot access the FormsPro administrator pages to create and administrate forms for your organization.
6. Specify the license status.

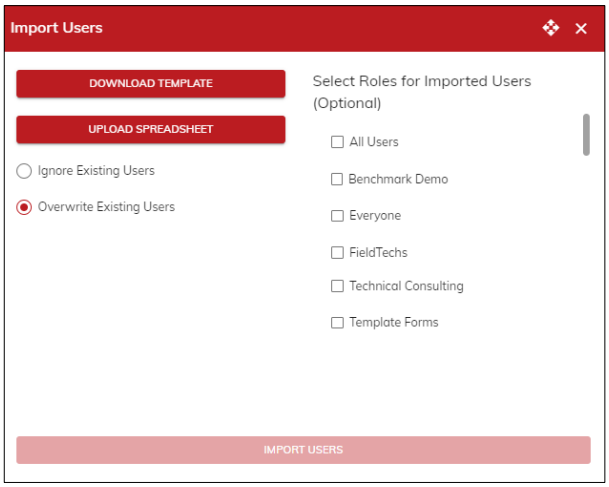
   Mark **Licensed**, then specify **Active** or **Inactive**. Inactive licensed users count towards your user count, but unlicensed users do not.

   Mark **Unlicensed** if the user is unlicensed. This information is used when a group of AD users is added. For example, you have 200 licenses and 30 already exist in the system. You sync 200. The last 30 of those are unlicensed since you cannot go over 200 licenses.
7. Assign roles to this user. A user can have multiple roles.
8. Click **Save**.

IMPORT USERS

If you have many users to add at once, you can import information from a spreadsheet template into FormsPro.

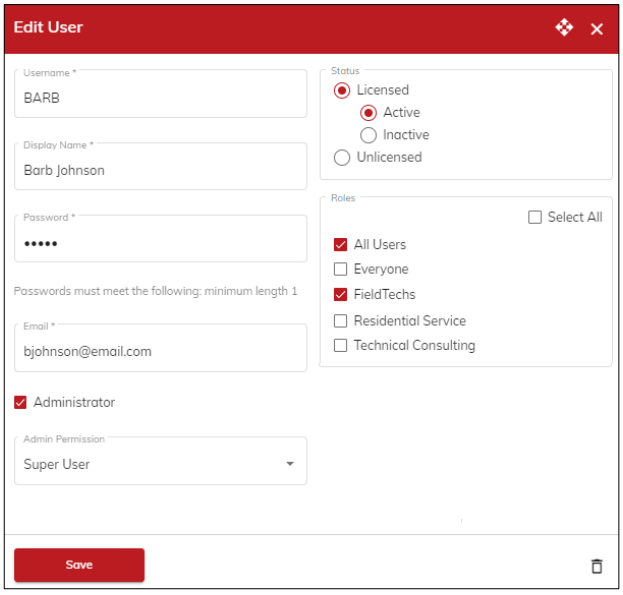
1. From the **Administration** menu, click **Users** to open the Users page. In the upper right, click (Import Users). The Import Users window appears.



2. Click **Download Template**. This downloads an Excel template to your Downloads folder with the correct columns for the information needed for the import. Add the users to the rows in the template and save as an .xlsx file. (At this time, only .xlsx files are accepted in the import.)
3. Click **Upload Spreadsheet**. Select the template you downloaded that contains the user information.
4. To quickly assign roles to all users on the import, select roles from the list. The roles you choose are assigned to all users on the import. This is an optional step.
5. Select whether you want to ignore or overwrite existing users with the import.
6. Click **Import Users** to begin the import.
7. Once the import is complete, verify and edit any of the newly added users.

EDITING/DELETING USERS

Click any username line in the list on the Users page to open the Edit User window, as shown in the following illustration.



If a user was added using another application, a **Managed with single sign-on** checkbox appears at the top of this window. This field is always disabled and when marked, the Username, Display Name and Email fields are display only and the Password field is hidden.

Make your changes and click **Save**. Changing a role may affect the forms that are brought to a user's device.

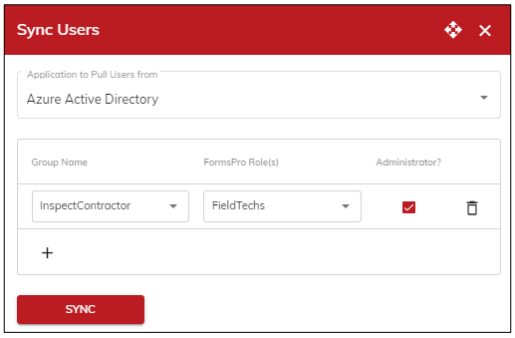
To delete a user, click (Delete) in the Edit User window, or click (More) on the far right of the Users page, then click **Remove**.

SYNC USERS

The Sync Users window retrieves the information needed to get the FormsPro users from Azure Active Directory. This enables users to begin using forms as soon as possible.

You must have a connection/integration set up between FormsPro and Azure AD, and the FormsPro users must exist in the Azure AD group before you can sync users. See the appendix for more information about the Azure AD integration.

1. From the **Administration** menu, click **Users** to open the Users page. In the upper right, click (Sync Users). The Sync Users window appears.



2. From the Application to Pull Users from field, select **Azure Active Directory**.
3. Select the group name and FormsPro roles.
4. Specify if the group has administrator rights.
5. Click **Sync** to sync the user information.

RESETTING PASSWORDS

If a user forgets their password, an administrator can reset the password using the Edit User window. Change the entry in the Password field to a default password and click **Save**. Then, in the app, the user can log in using that password. We recommend changing the password once logged in using the Change Password page (More Menu > Change Password). The same reset password process is used on the administrator site as for the app.

ADMINISTRATIVE PERMISSIONS

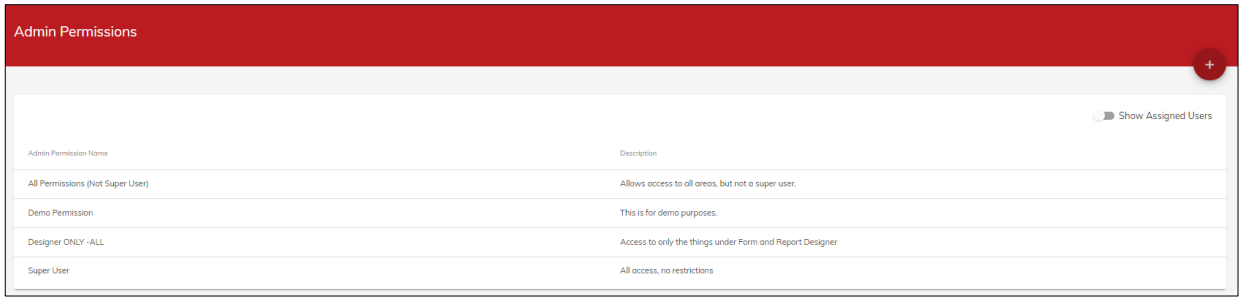
Use the Admin Permissions page to manage administrative access.

The Super User permission is provided and has all access, with no restrictions to the FormsPro Admin site. You cannot edit or delete the Super User permission. The super user will be automatically provided with access to any new features that are added to FormsPro in the future. We recommend that a Super User permission is assigned to at least one administrator.

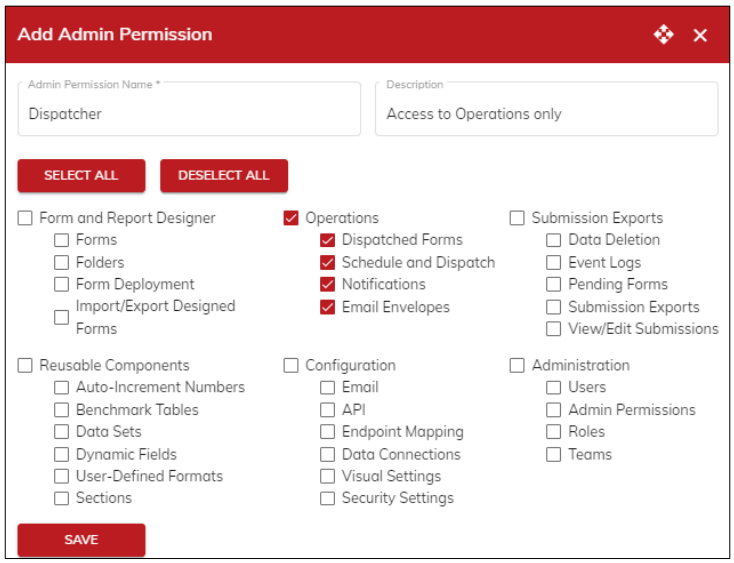
Once a permission is created, it can be assigned to a user. A user can have only one permission assigned and can only open the pages/windows to which they have access. The options they do not have access to are disabled in the admin site.

Access to forms is provided on a folder basis. Access can be limited to individual folders and are editable.

1. From the **Administration** menu, click **Admin Permissions** to open the Admin Permissions page.



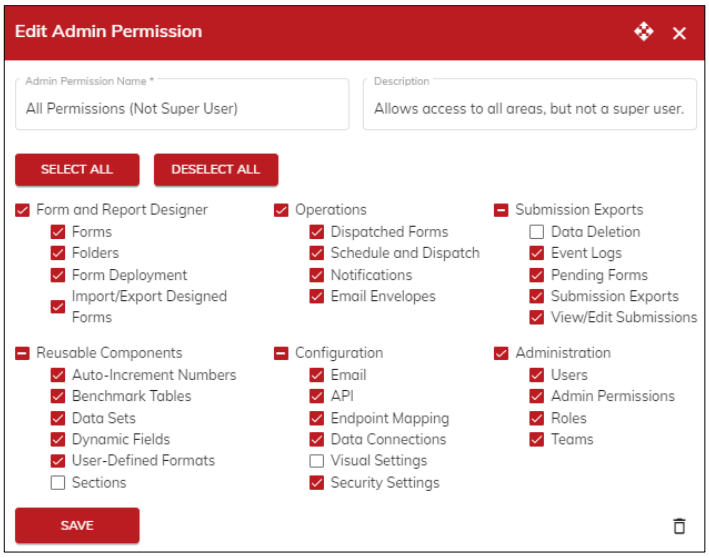
2. Toggle the **Show Assigned Users** option on to view the users assigned to each admin permission.
3. Click the **Add** button and open the Add Admin Permission window, where you specify what the admin permission has access to.



4. Enter a name and description for the admin permission.
5. The FormsPro options are organized by menu. Mark each menu option to which you want the users assigned to the permission to have access.
6. Click **Save** to save your entries.

EDITING PERMISSIONS

1. From the Admin Permissions page, click on a permission to open the Edit Admin Permission window.

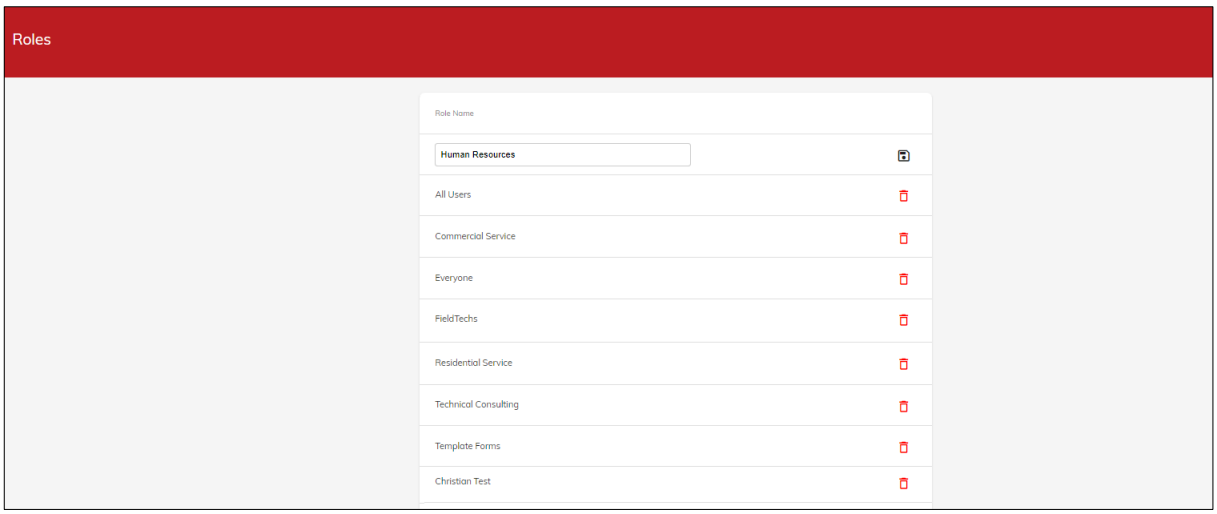


2. Make your changes.
3. Click **Save** to save your changes. To delete an admin permission, click the trash can icon.

ROLES

Forms are role-based. Each user is assigned a role; then, forms are assigned a role. When the user logs in to the app, the forms assigned to their role are shown on the device. At least one role must be created.

1. From the **Administration** menu, click **Roles** to open the Roles page.



2. Click in the **Role Name** field and enter a role. You can be as generic or as specific as you would like, depending on how you want your forms distributed.
3. Click and continue the process until you have the roles you need set up.

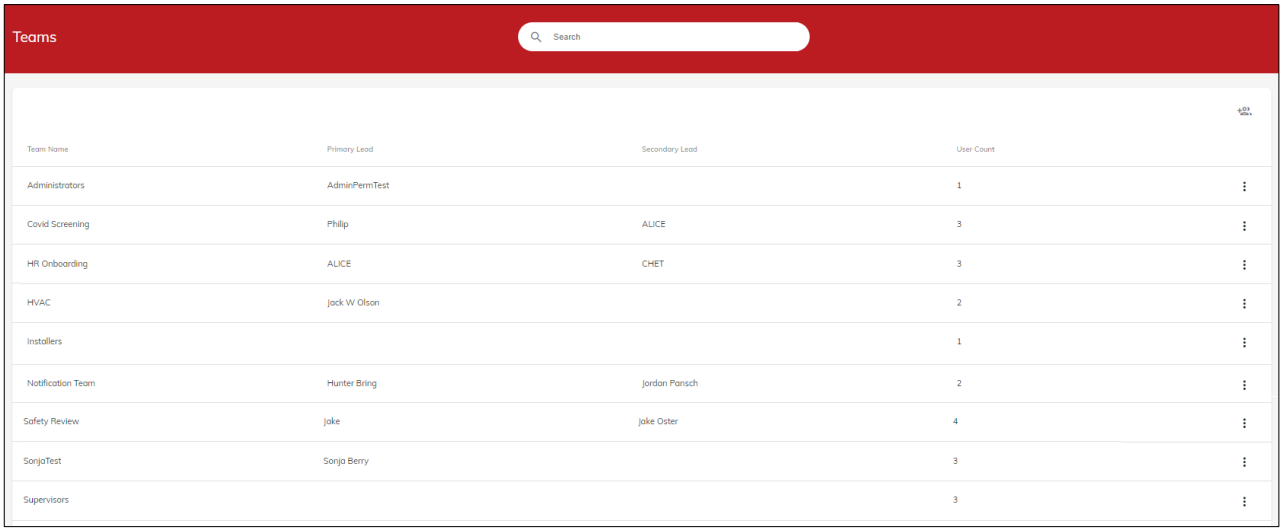
DELETING ROLES

Roles are deleted from the same Roles page used to create them.

Click (Delete) next to the role you want to delete. You cannot delete roles that are assigned to users or forms. You need to remove the assignments first.

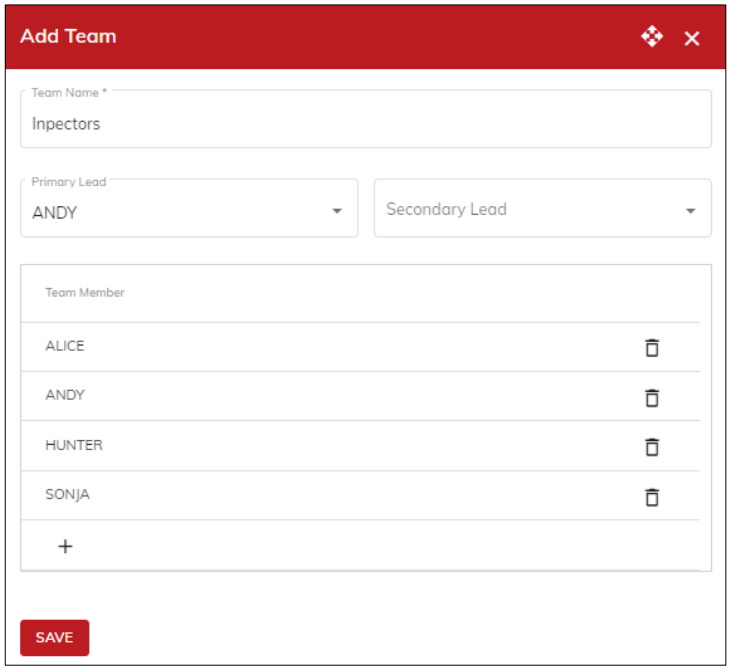
TEAMS

Teams are used for the workflow feature. When a form needs to go through a series of steps in a workflow, teams help provide a list of users that can be selected during the workflow either as a group, or individually. Users can be assigned to as many teams as needed to accommodate different workflows.



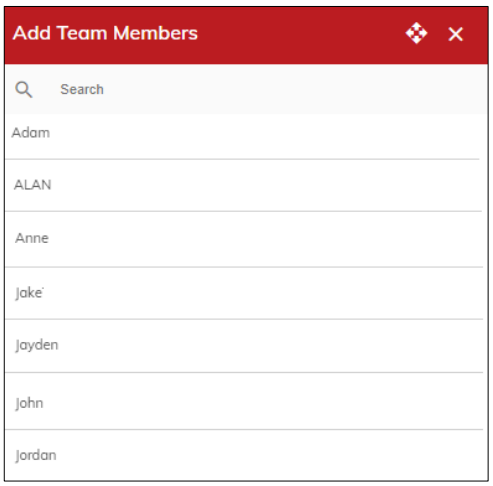
Set up users before setting up teams.

1. From the **Administration** menu, click **Teams** to open the Teams page. In the upper right, click (Add Team) to open the Add Team window.



2. Enter a team name in the **Team Name** field.
3. Click the Add icon in the Team Member list:

The Add Team Members window appears.



4. Select the members of the team from the list of users in FormsPro.
5. Select a primary lead from the list of team members already on the team. Then, select a second lead if necessary. Team leads are used to assign a supervisor or other type of person in charge to a step in a workflow.
6. Click **Save**.

EDITING/DELETING TEAMS AND ROLES

Editing a team likely affects a form's workflow. You may want to check and edit the workflow before making your edits to ensure a smooth transition. Click any team name line on the Teams page and make changes in the Edit Team window. Click **Save** when you've completed your changes.

To delete a team, click ⋮ (More) on the far right on the Team list, then click **Remove**.

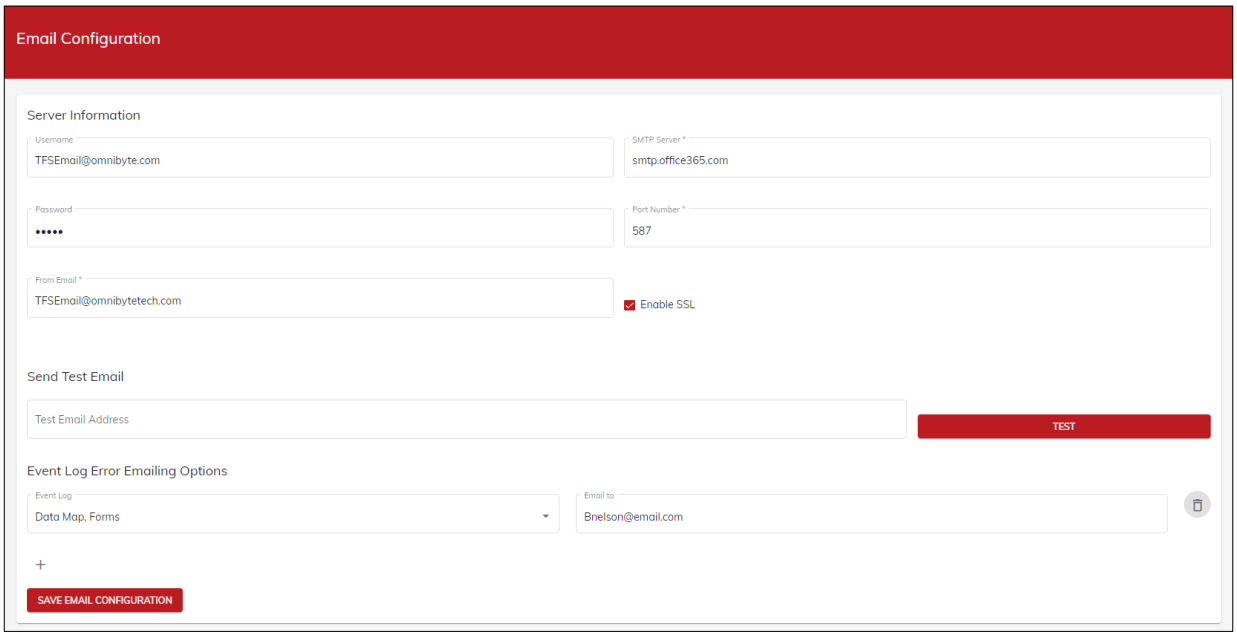
CONFIGURATION MENU

Use the Configuration menu to add email server information, enter API settings, create endpoint integrations, create data connections, change visual settings and security settings.

EMAIL

Use the Email Configuration page to add server information to send forms via email.

1. From the **Configuration** menu, click **Email** to open the Email Configuration page.



2. Enter an email address for the user that connects to the simple mail transfer protocol (SMTP) server and sends the email.
3. Enter the SMTP server name.
4. Enter the password used to connect to the SMTP server.
5. Enter the port number used by the SMTP server.
6. Enter the email address that appears in the From field in the email header for any emails sent from the FormsPro mobile app.
7. Mark **Enable SSL** if the SMTP server uses Secure Sockets Layer.
8. Enter a valid email address, such as your own address, and click the **Test** button to send a test email to ensure your settings are correct.
9. In the Event Log Report Emailing Options section, click the Add button to specify event error log reports to be sent for error conditions to ensure the right personnel is aware of the errors and failures.

   Select the type of event log(s) to be emailed. Options include API, Data Map, Delete, Deployment, and Forms. Then enter the email address in which to send the logs. You can create as many combinations of logs and emails as you'd like.

   In a multi-site scenario where more than one site may be active at a time, we recommend that you use different From addresses to tell which site has the error.

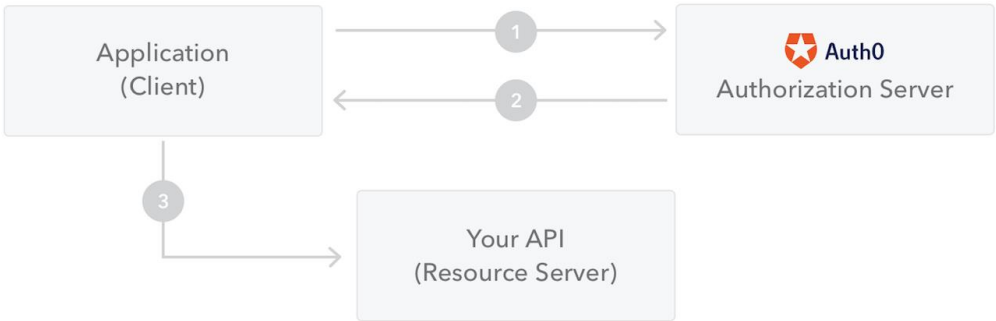
10. Click the **Save Email Configuration** button to save the configuration information.

API

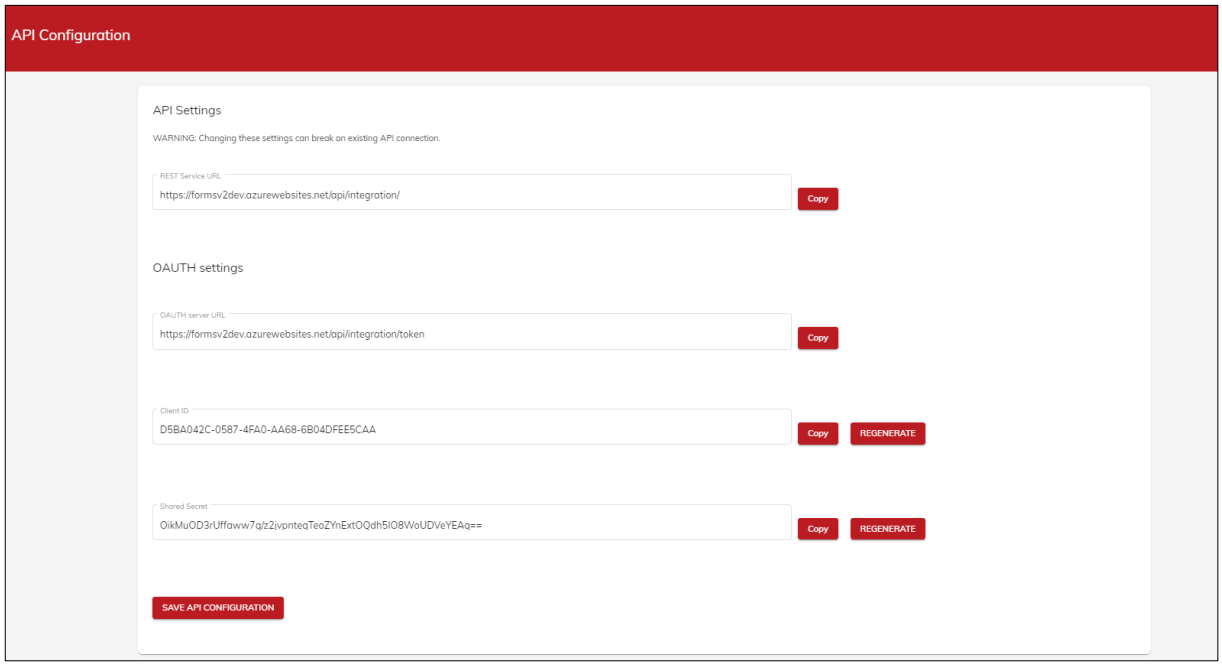
FormsPro provides programmatic access to your submitted forms data through RESTful (Representational State Transfer) web services. RESTful web services are lightweight, stateless, highly scalable, and make your integration simple and easy.

This information provides basic instructions. For more details or help setting up an API, we suggest working with OmniByte or another person in your organization who is familiar with APIs or development procedures.

To provide access to 3rd party systems, FormsPro implements the OAuth 2.0 client credentials flow. For more information on this flow, refer to this link: https://auth0.com/docs/api-auth/grant/client-credentials



1. From the **Configuration** menu, click **API** to open the API Configuration page.



2. Enter a REST Service URL which is the URL used to retrieve FormsPro data. Click **Copy** to copy the URL to the clipboard for pasting into another source.

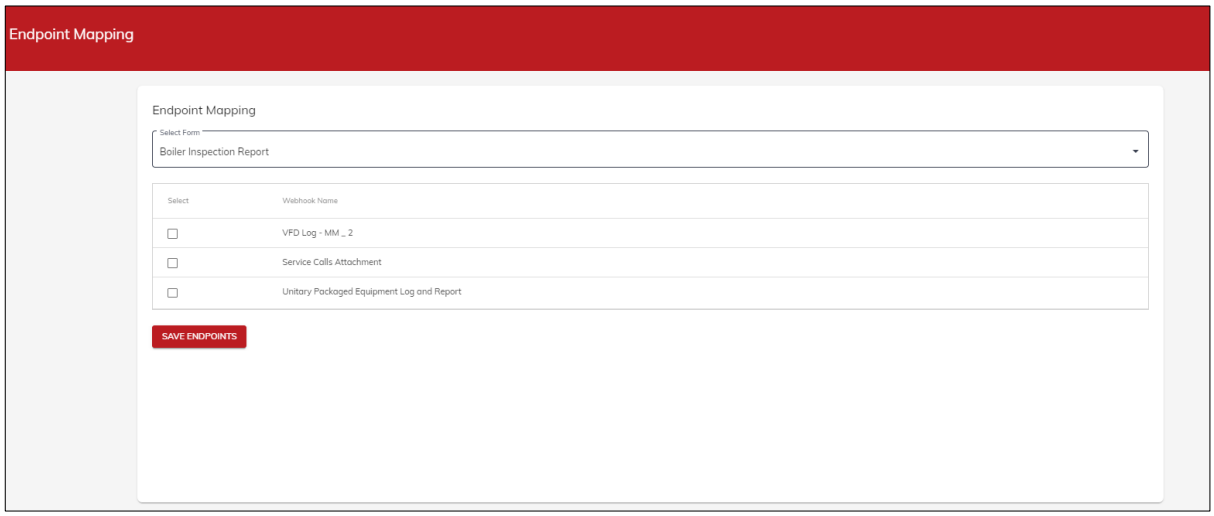
3. Enter an OAuth Server URL which is the URL used to retrieve security tokens for API calls. Click **Copy** to copy the URL to the clipboard for pasting into another source.
4. Enter a client ID and the shared secret which are used to authorize calls to the FormsPro API. Click **Copy** to copy the client ID or shared secret to the clipboard for pasting into another source.

   Click **Regenerate** when you get a new client ID and/or shared secret. This removes access to old connections and updates to new.
5. Click **Save API Configuration** to save the configuration information.

ENDPOINT MAPPING

Use the Endpoint Mapping page to associate a form with an integration endpoint.

1. From the **Configuration** menu, click **Endpoint Mapping** to open the Endpoint Mapping page.

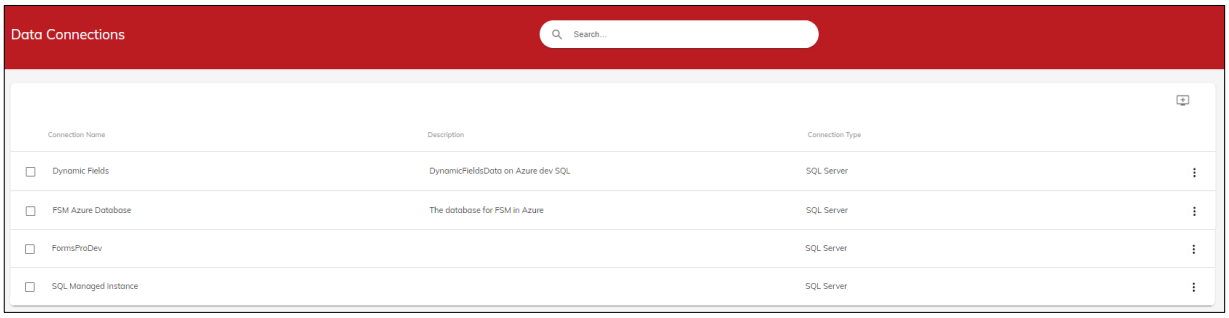


2. Select the form to which you want to associate an endpoint.
3. Select the webhooks. A webhook delivers data to other applications by altering the behavior of an application with custom callbacks.
4. Click **Save Endpoints** to save the information.

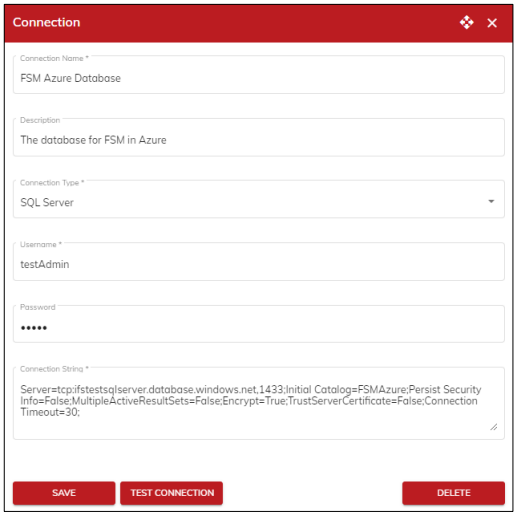
DATA CONNECTIONS

Use the Data Connections page to configure connection information to a database. The connection string is encrypted when saved to the database.

1. From the **Configuration** menu, click **Data Connections** to open the Data Connections page.



2. Click (Add Connection) to open the Connection window.



3. Enter a connection name and description for the connection. This helps you identify the data connection if you connect to more than one database.

4. Select a connection type. The connection types available in FormsPro include **SQL Server**, **REST/OAUTH**, **IFS FSM**, **Attachment**, and **Deployment**. Contact OmniByte support if you are looking for a type that's not available in the list.

5. Enter a username and password to enable access to the connection. Depending on the connection type, these fields may differ.

6. If you select Attachment as the connection type, select **Azure File Share** or **Windows File Share** as the attachment storage type. If you select Azure File Share complete the following fields:

   Account Name or **User Name**: Enter the user name/ID for accessing the storage site.

   Account Key or **Password**: Enter the password or secret that the storage type requires for accessing the storage site.

   File Share or **File Endpoint**: Enter the URL/endpoint for the storage site where attachments using this connection are stored.

   Default Folder in Share: Enter the folder name for the attachments to be stored in using this connection.

   If you want to use more than one folder, you will need to set up multiple connections for one to each folder.

Files that are uploaded to a device will appear with a temporary name using a GUID. Once the form is submitted, the naming convention will be used. Attachments in this “temporary” state are not picked up by the automated services that move files. If you have old attachments that appear to use the temporary name, it’s likely the that the form was deleted, and the attachments were not. These can be deleted at your discretion.

If you select Windows File Share as the attachment storage type, only the Default Folder in Share field is enabled.

7. Enter a connection string to initiate a connection to the data source.
8. Click **Test Connection** to ensure your settings are correct.

   Data connections can be edited by clicking a connection on the Data Connections page. The Connection window opens, and the settings can be changed.

9. Click **Save** when you’ve completed your changes.

Data connections can be deleted if they have not been used on a form. Click ⋮ (More) on a data connection line and click **Remove** or click 🗑 (Delete) in the Connection window.

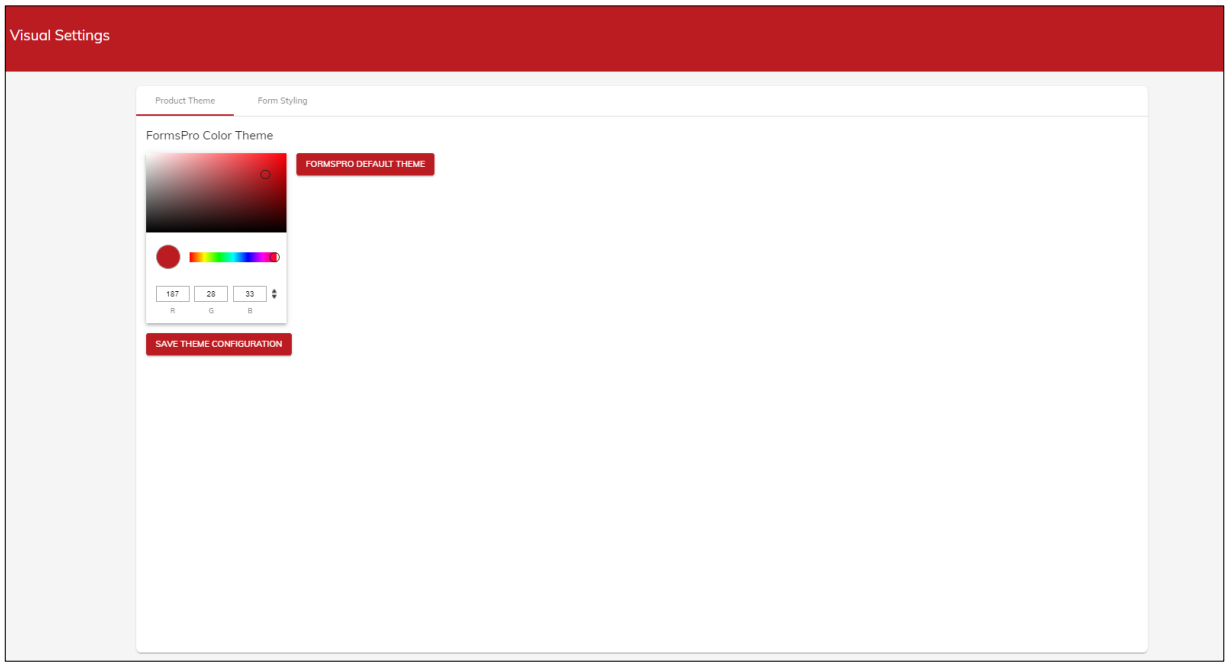
VISUAL SETTINGS

Use the Visual Settings page to format the color scheme in the FormsPro admin site and the mobile app, and to set default visual options for logos, headers, labels, and tables.

SETTING THE PRODUCT THEME

Use the Product Theme tab to set the color theme for the admin site and the mobile app. Mobile app users see the change the next time they log in or sync.

1. From the **Configuration** menu, click **Visual Settings** to open the Visual Settings page. Click the **Product Theme** tab.



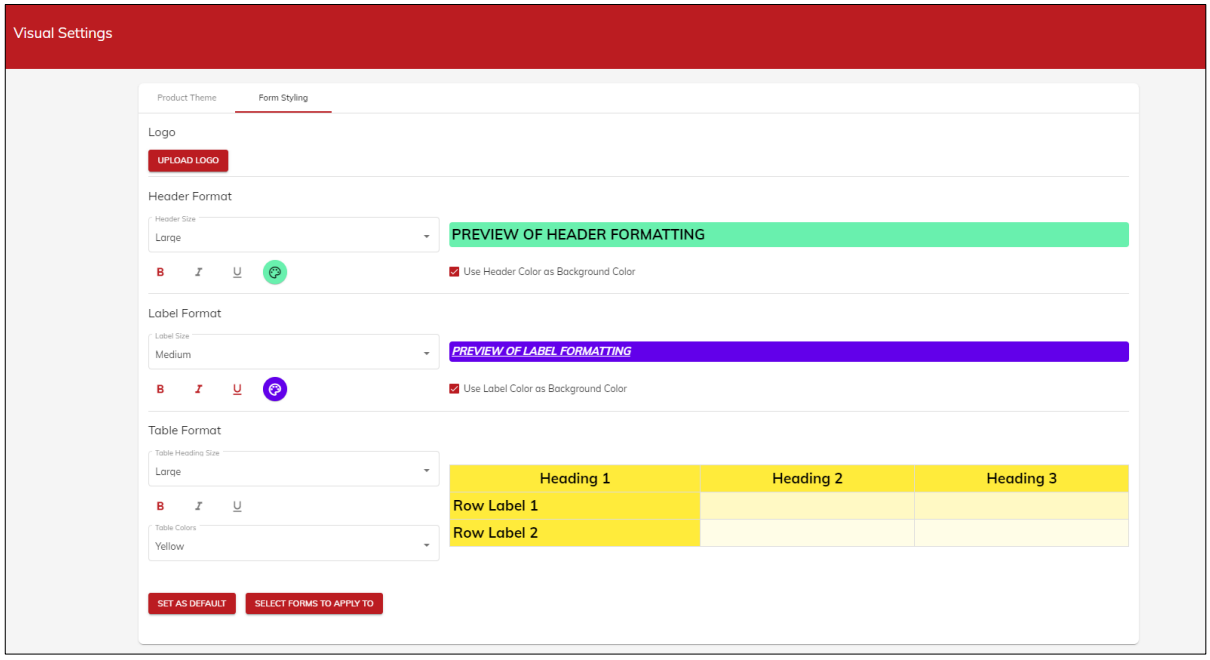
2. Change the color by sliding to the color for which you are looking. You can get an exact color by entering the RGB color, or by clicking the up and down arrows next to the colors to change to a different color format – either HSL or HEX.
3. Click **Save Theme Configuration**.

> Click **FormsPro Default Theme** to return to the original FormsPro red, then click **Save Theme Configuration**.

SETTING FORM STYLING

Use the Forms Styling tab to set the visual formatting for logos, headers, labels, and tables.

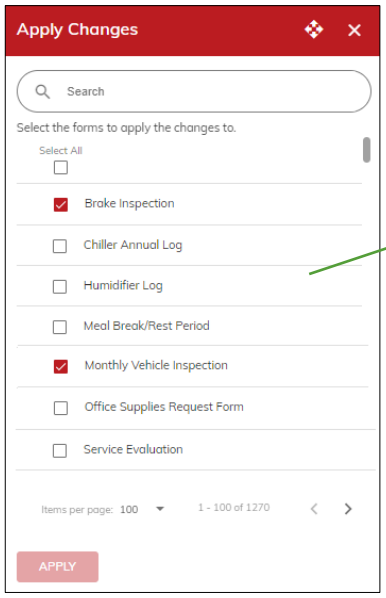
1. From the **Configuration** menu, click **Visual Settings** to open the Visual Settings page. Click the **Forms Styling** tab.



2. To include a logo on forms, click the **Upload Logo** button to select a logo. If you select a logo, the **Show in header** option defaults marked. Mark the **Show in footer** option to display the logo in the footer.
3. Apply default visual settings to the form elements. You can specify the size, format, and color to headers, labels, and tables.
4. Click **Set as Default** to save the settings as the default to use on new forms.

   Click **Select Forms to Apply to** to open the Apply Changes window. Select the forms to which you want to apply the changes, then click **Apply**. A confirmation message appears.

> If you are using versioning on a form, the form versions will be displayed in the Apply Changes window so that you can apply the changes to a specific form version.



Select the forms to which you want to apply the visual settings. In this example, only the Brake Inspection and Monthly Vehicle Inspection forms will have the visual settings applied.

SECURITY SETTINGS

Use the Security Settings page to specify password and device settings. The Password Settings tab is used to enable multifactor authentication and to set the password settings for non-single sign-on (SSO) authentication. The Device Settings tab is used to set the default timeout period for all devices.

SETTING THE PASSWORD SETTINGS

Use the Password Settings tab to enable multifactor authentication and to set the password settings for non-single sign-on (SSO) authentication.

1. From the **Configuration** menu, click **Security Settings** to open the Security Settings page. Click the **Password Settings** tab.

2. Toggle the **Enable Multifactor Authentication** toggle on enforce multifactor authentication. This grants the device user access to FormsPro after successfully presenting pieces of evidence.

3. Specify the minimum length of the non-SSO password. We recommend a minimum of 6 for numeric only passwords; a minimum of 8 and maximum of 64 for alpha-numeric passwords.

   The password cannot have a minimum length of 0; it must be at least 1.

4. Specify the complexity requirements of the password.

   Select **None** if no complexity is required for passwords.

   Select **Complex** to decide which complexities to require for all passwords. Complexities include alpha characters, numeric characters, special characters, uppercase and lowercase.

5. Specify the password expiration.

   Mark **No Expiration** if you don't want the password to expire.

   Mark **Set Days to Expire**, then entire the number of days users will be logged out automatically.

6. Specify if you want to enforce password history.

   Mark **Don't Enforce** so the password can be the same as a previously used password.

   Mark **Enforce**, then enter the number of passwords to remember or toggle the **Enforce with No Repeats** option on to not allow repeats.

7. Specify the maximum invalid login attempts.

   Mark **No Maximum** to allow an unlimited amount of login attempts.

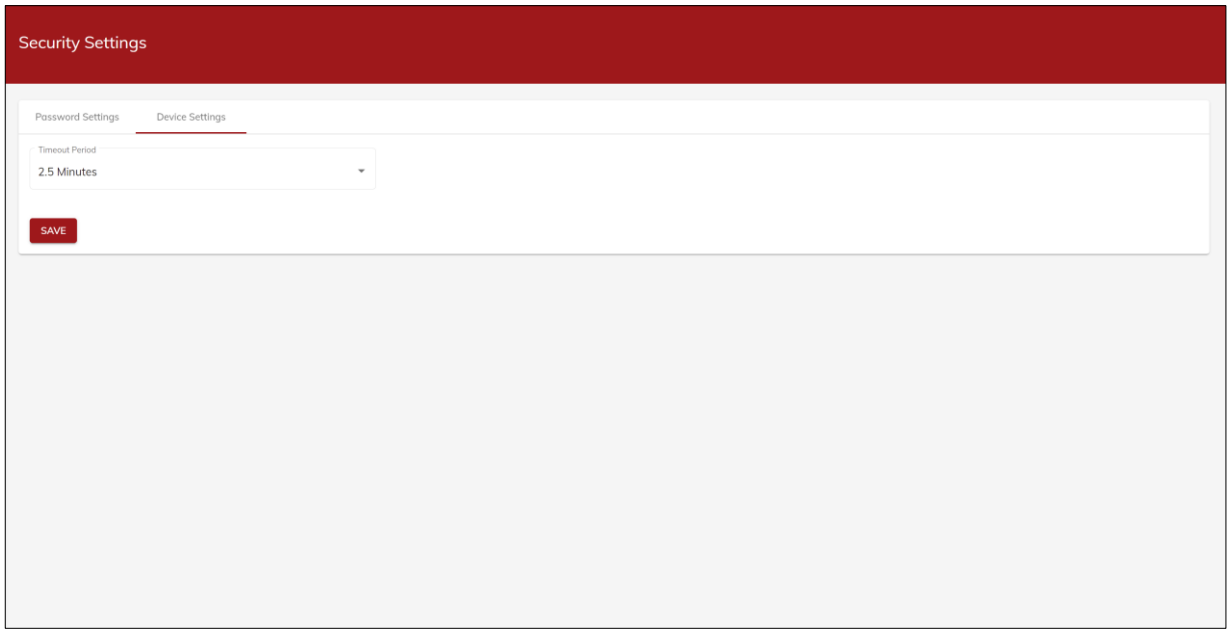
   Mark **Set Maximum Attempts**, then enter the number of attempts a user can make, and the minutes they will be locked out if they exceed the maximum attempts.

8. Click **Save Password Settings** to save your settings.

SETTING THE DEVICE SETTINGS

Use the Device Settings tab to set the default timeout period for devices.

1. From the **Configuration** menu, click **Security Settings** to open the Security Settings page. Click the **Device Settings** tab.



2. Select the default timeout period for all devices. Timeout periods can be specified from 30 seconds to 3 minutes, in 30 second increments. Technicians can change the default timeout period in the FormsPro app on each of their devices.
3. Click **Save** to save your settings.

REUSABLE COMPONENTS MENU

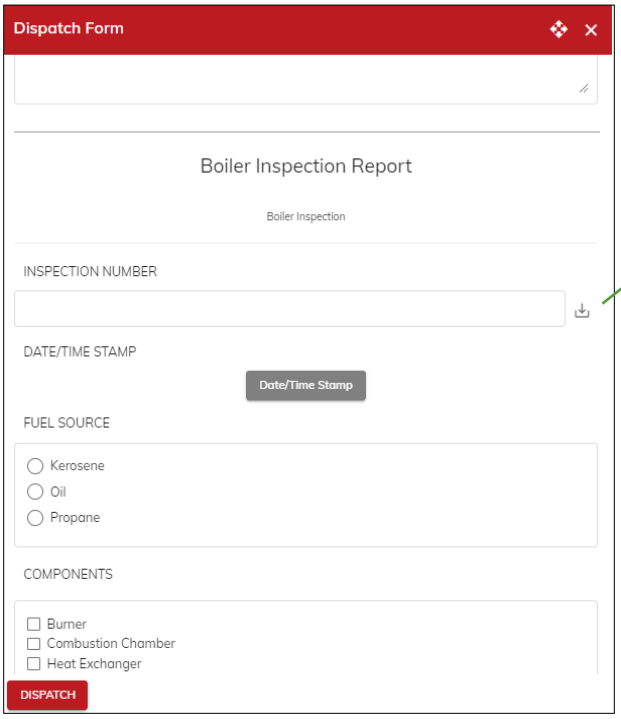
Use the Reusable Components menu to create auto-incrementing numbers, benchmark tables, data sets, dynamic fields, sections, and user-defined formats.

AUTO-INCREMENTING NUMBERS

Technicians may have paper forms with a document number printed on them. FormsPro allows you to imitate this number by adding a user-defined document number to forms.

This user-defined number can be added to multiple forms. The auto-incrementing number is mappable on a linked form so that the parent and child form can use the same number.

An auto-incrementing number is retrieved by clicking the Get Number Value icon when pre-filling out a form in the Dispatch Form window. If the number is not retrieved by clicking this icon, then it is retrieved when dispatching the form and the assigned number shows on the form that the technician receives on their device.



Click the Get Number Value icon to retrieve the auto-incremented number.

If you are starting the form from a device, the number can also be retrieved by clicking the Get Number Value icon. If the number is not retrieved by clicking that icon, then it is retrieved when submitting the form.

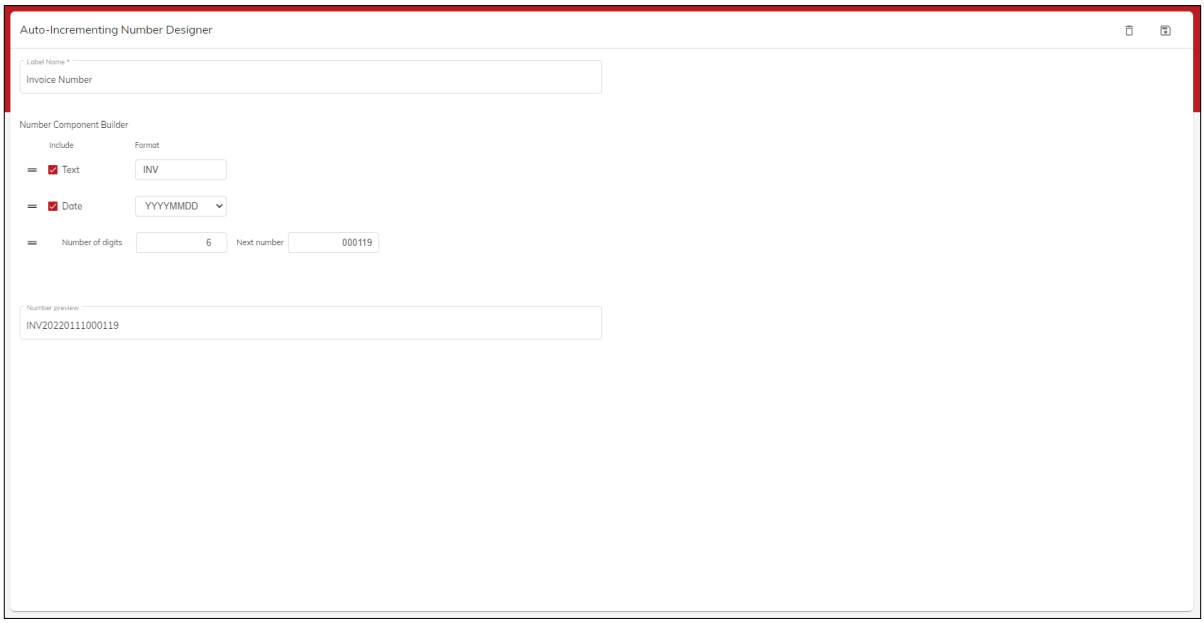
An auto-incrementing number increments when a form is submitted, when a form is dispatched or manually when clicking the Get Number Value icon.

Use the Auto-Incrementing Number Designer page to define the information contained in an auto-incrementing number.

NOTE

An auto-incrementing number can be edited at any time. The changes are reflected on forms with that number going forward; forms already submitted reflect the auto-incrementing number before the change was made.

1. From the **Reusable Components** menu, select **Auto-Increment Numbers**. Click **New Number**. The Auto-Incrementing Number Designer page opens.

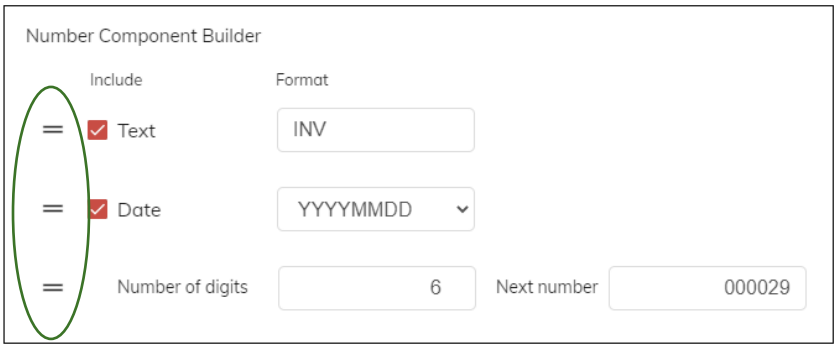


2. Enter a label name for the auto-incrementing number.
3. Mark **Text** to include a text prefix to the number, then enter the text format.
4. Mark **Date** to include a date in the number, then select the date format. The date formats include:

Format	**Example Using April 10, 2020**
YYYYMMDD	20200410
YYYY-MM-DD	2020-04-10
MMDDYYYY	04102020
MM-DD-YYYY	04-10-2020
DDMMYYYY	10042020
DD-MM-YYYY	10-04-2020
DDMMMYYYY	10APR2020
MMMDDYYYY	APR102020
YYYY-MM	2020-04

5. Enter the number of digits you want the auto-incrementing number to contain, then enter the next number to appear on the form. The Number Preview field displays the number that appears on the form.

   The user-defined number can be arranged in the order you want by dragging and dropping the handle icon for the Text, Date, and Number of digits fields.



If all numbers are used, the auto-incrementing number "rolls over" to 1. For example, if your starting number is 026, when 999 is reached, the next number is 001.

6. Click (Save). The auto-incrementing number is now available to add to a form.

DELETING AN AUTO-INCREMENTING NUMBER

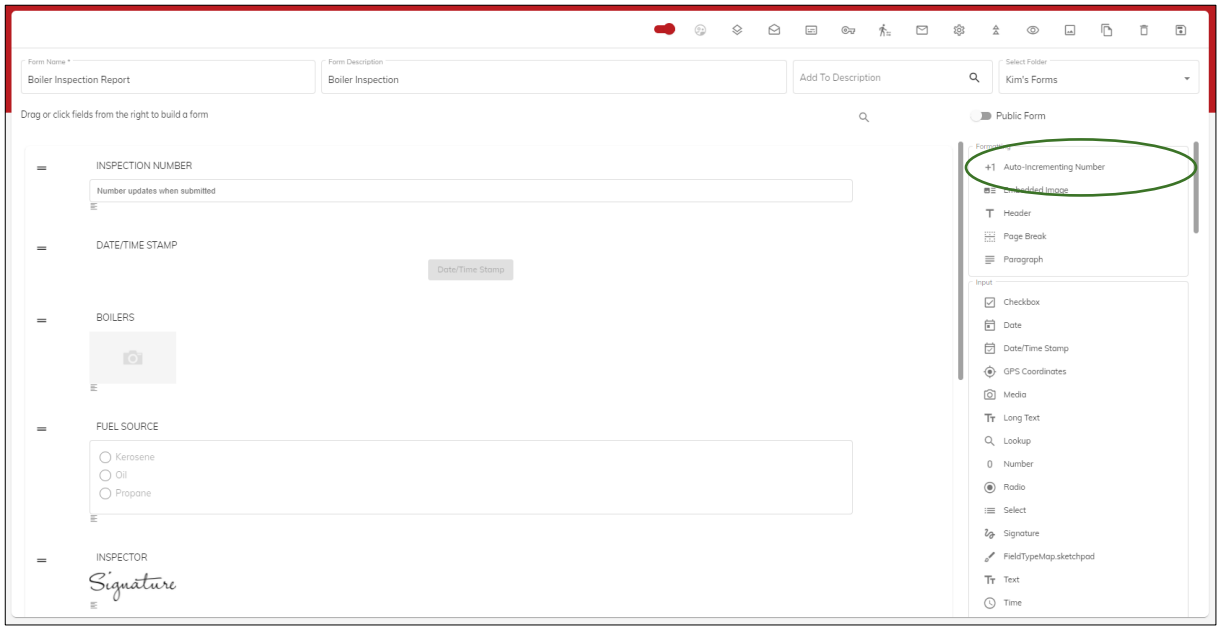
An auto-incrementing number can be deleted if it does not exist on a form.

1. From the **Reusable Components** menu, select **Auto-Increment Numbers**, then select the one you want to delete. The Auto-Incrementing Number Designer page opens.
2. Click (Delete) to remove the number. If the auto-incremented number exists on a form, a message appears listing the forms on which the number exists.

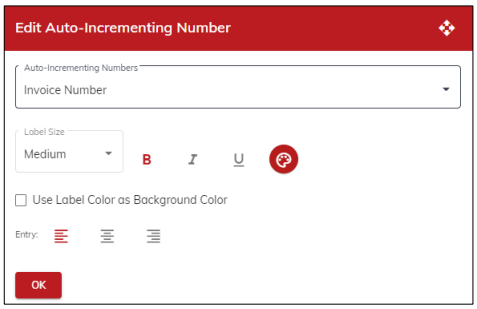
ADDING AN AUTO-INCREMENTING NUMBER TO A FORM

You can add an auto-incrementing number to a new or an existing form. You can add as many auto-incrementing numbers as you want on a form; the only limitation is how many auto-incrementing number fields you have set up.

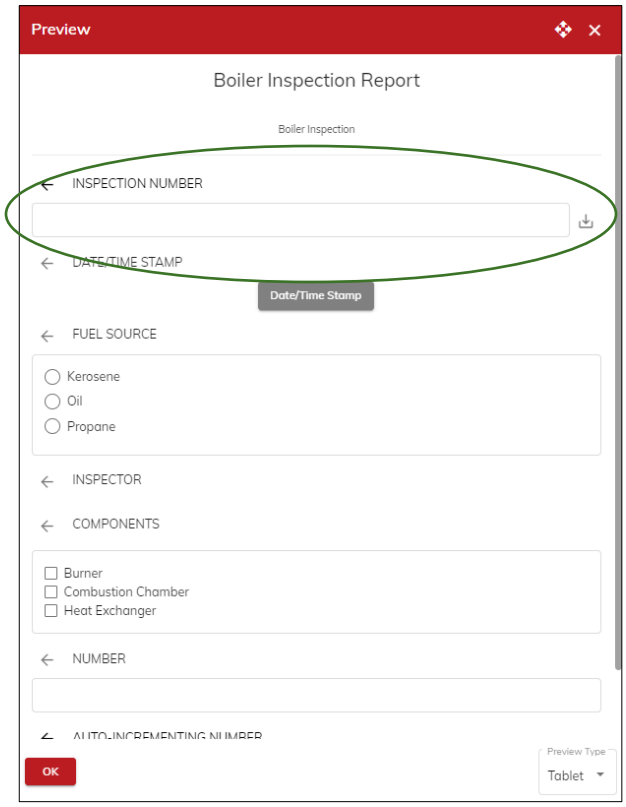
1. Click **New Form** at the top of the Administrator page or select an existing form to which you want to add an auto-incrementing number.



2. From the Formatting menu on the right-side of the Form Designer, drag the Auto-Incrementing Number input onto the form or click on it and it is inserted at the bottom of the form. This user-defined number can also be used in conditional fields.
3. Click **Edit** to open the Edit Auto-Incrementing Number window.



4. Select the auto-incrementing number you want to add to the form. You cannot save a form that doesn't have an auto-incremented number selected.
5. Select the label size and formatting for the user-defined number.
6. Mark **Use Label Color as Background Color** if you want the label color to be used as the background color for the field.
7. Select the field's justification (left margin, center, or right margin).
8. Click **OK**. The Form Designer appears.
9. Click (Save) to save the auto-incrementing number on the form.
10. If you want, click (Preview) to view the auto-incrementing number that was placed on the form. The auto-incrementing number is now available to be used on forms.

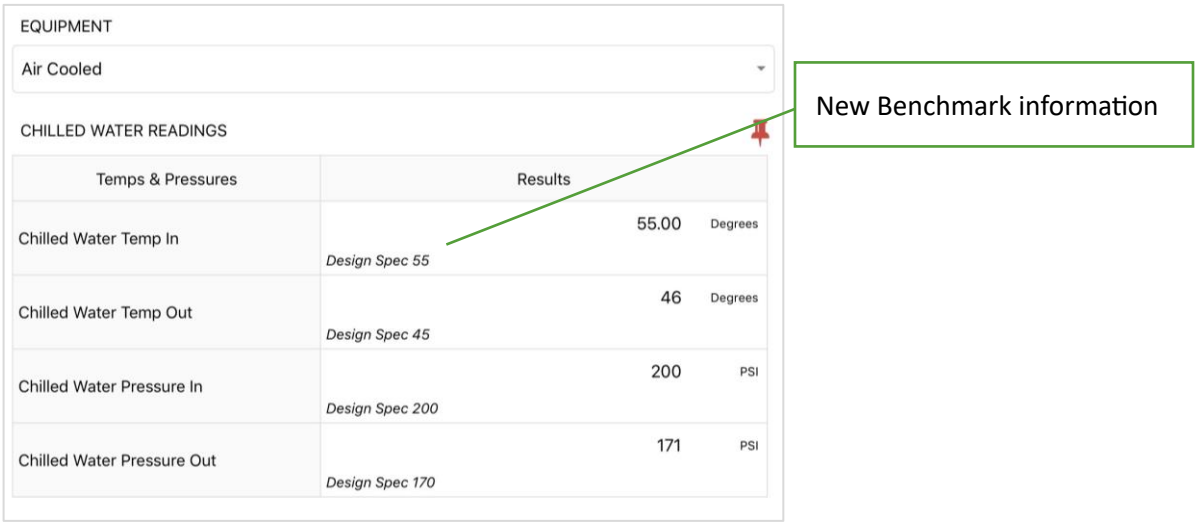


11. Click **OK** in the Preview window to return to the Forms Designer.

BENCHMARK TABLES

Benchmarks provide a method for showing a value from another source next to an entry field on the app. This provides the app user with additional information to use for checking whether their entry is correct, or whether it falls within a specification.

In the following example, this field contains a benchmark called Design Spec. This is what it will look like on the mobile app:



Because these benchmarks can change depending on certain criteria, you can set up your benchmark table to contain multiple equipment records, each with several benchmarks. When you select the criteria on the form in the app, the benchmarks change based on the selected criteria. In the following example, when the equipment number is changed, the design specifications change for each reading the mobile user needs to enter:

EQUIPMENT

Air Cooled

CHILLED WATER READINGS

Temps & Pressures	Results		
Chilled Water Temp In	*Design Spec 55*	55.00	Degrees
Chilled Water Temp Out	*Design Spec 45*	46	Degrees
Chilled Water Pressure In	*Design Spec 200*	200	PSI
Chilled Water Pressure Out	*Design Spec 170*	171	PSI

EQUIPMENT

Centrifugal

CHILLED WATER READINGS

Temps & Pressures	Results		
Chilled Water Temp In	*Design Spec 45*	55.00 *> 10% Design Spec*	Degrees
Chilled Water Temp Out	*Design Spec 40*	46	Degrees
Chilled Water Pressure In	*Design Spec 450*	200	PSI
Chilled Water Pressure Out	*Design Spec 425*	171	PSI

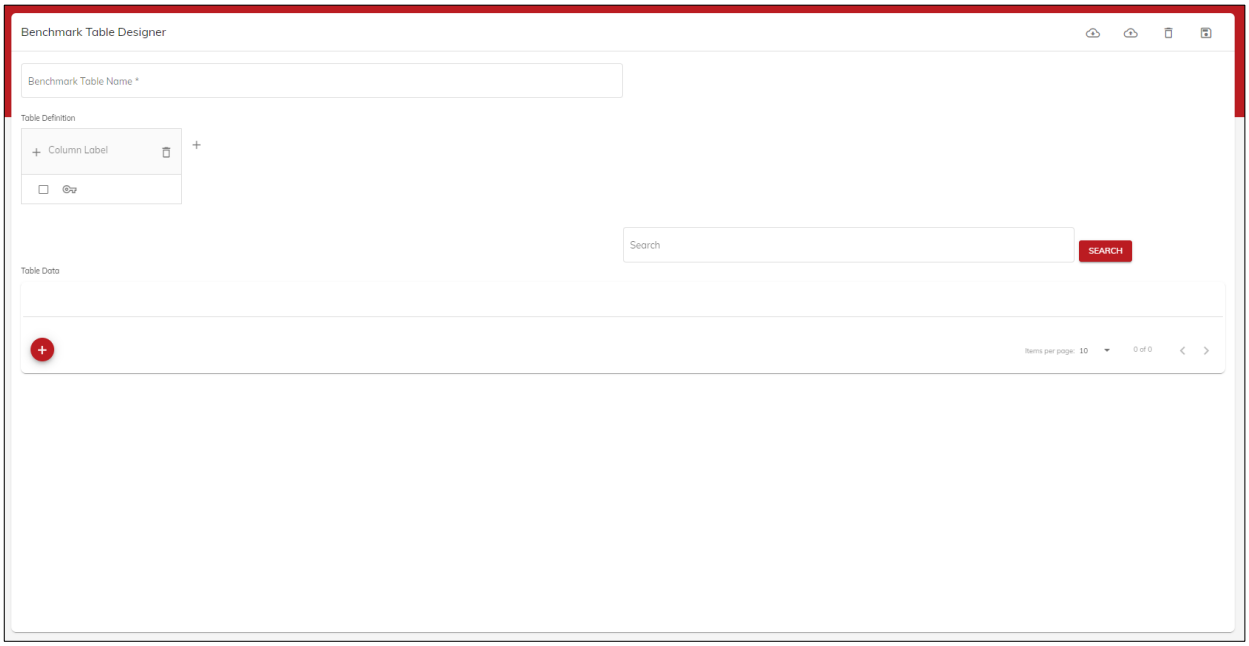
You can define your benchmarks however you need. For example, manufacturers provide design specification temperatures for much of the equipment your team inspects. You would like the techs who do the inspection to be able to see the design spec and compare it to the reading taken on the inspection. You could even set up benchmarks in text fields which would change dynamically based on another field. For example, you could use benchmarks as a note for equipment records that changes based on the customer. In the Administrator Page, you'll set up a "benchmark table" which will store the design specifications for all the equipment. Then, in the Form Designer, you'll set which fields in the benchmark table you want to pull into each field.

The process for creating a benchmark table looks like this:

DEFINING A BENCHMARK TABLE

To start, you'll need to set up the source information in the Benchmark Table Designer.

1. From the **Reusable Components** menu, select **Benchmark Tables**, then choose **New Benchmark Table**. The Benchmark Table Designer page opens.

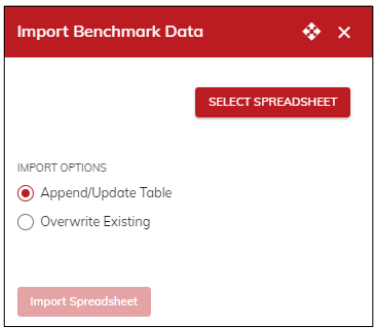


2. Name your benchmark table. It is a good idea to use the main reference for the table in the name. For example, the type of equipment you're setting the benchmarks for, such as chillers, so that if you have multiple equipment types that you'll be using benchmarks for, it's easy to select the correct one when designing the form.
3. Define the columns for your data. Enter a column label, then click the **Add** button to the right of the column. Continue to add columns until you have all the columns you need. Benchmarks can be applied only to numbers and text fields. If you need to move a column, click the Add button to the left of the column label. The column will move and allow you to define another column.
4. Define your key field(s). Key fields are used when looking up the benchmark data when filling out the form. In the example below, the Chiller field is the main piece of information to match against the table to bring in the benchmark data. The key field is assigned to a field on the form, which must be a text or dynamic field.
5. Click **Save** to save the benchmark table.

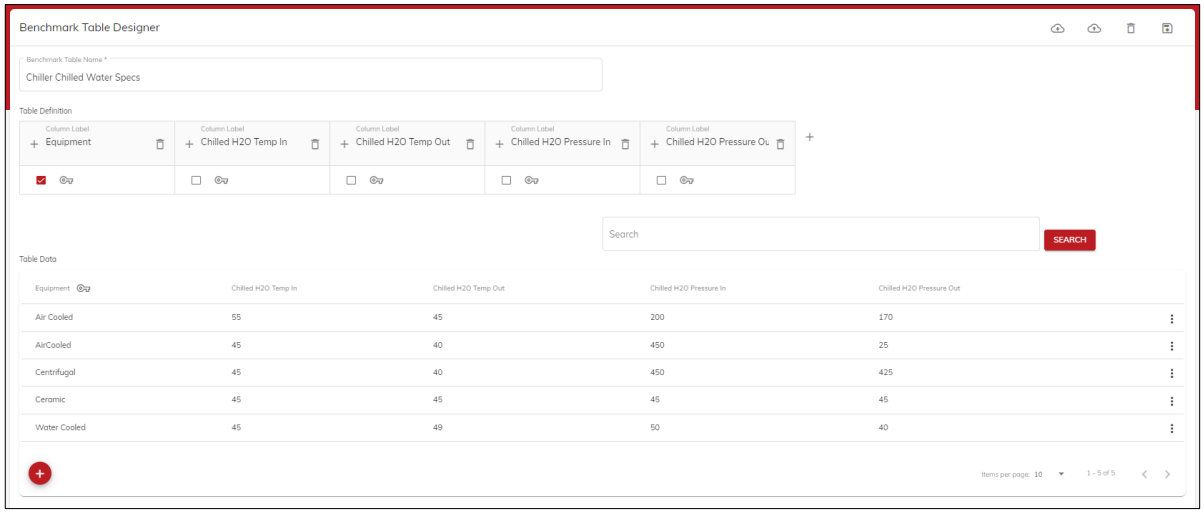
6. Click (Download Spreadsheet) to download the spreadsheet. This creates a spreadsheet with the columns exactly as you've defined them in step 3.
7. Fill the spreadsheet with your data. If you already have a spreadsheet with this information in it, you can copy and paste it into the spreadsheet you downloaded.

TIP: Save this spreadsheet. If you want to make changes it is easy to update this spreadsheet and upload the changes later.

8. Click (Import Spreadsheet). The Import Benchmark Data window opens.



9. Click **Select Spreadsheet** to browse to the spreadsheet you created in step 6. Select **Append/Update Table** as your import option and click **Import Spreadsheet**. When complete your table data appears and looks similar to the following illustration.



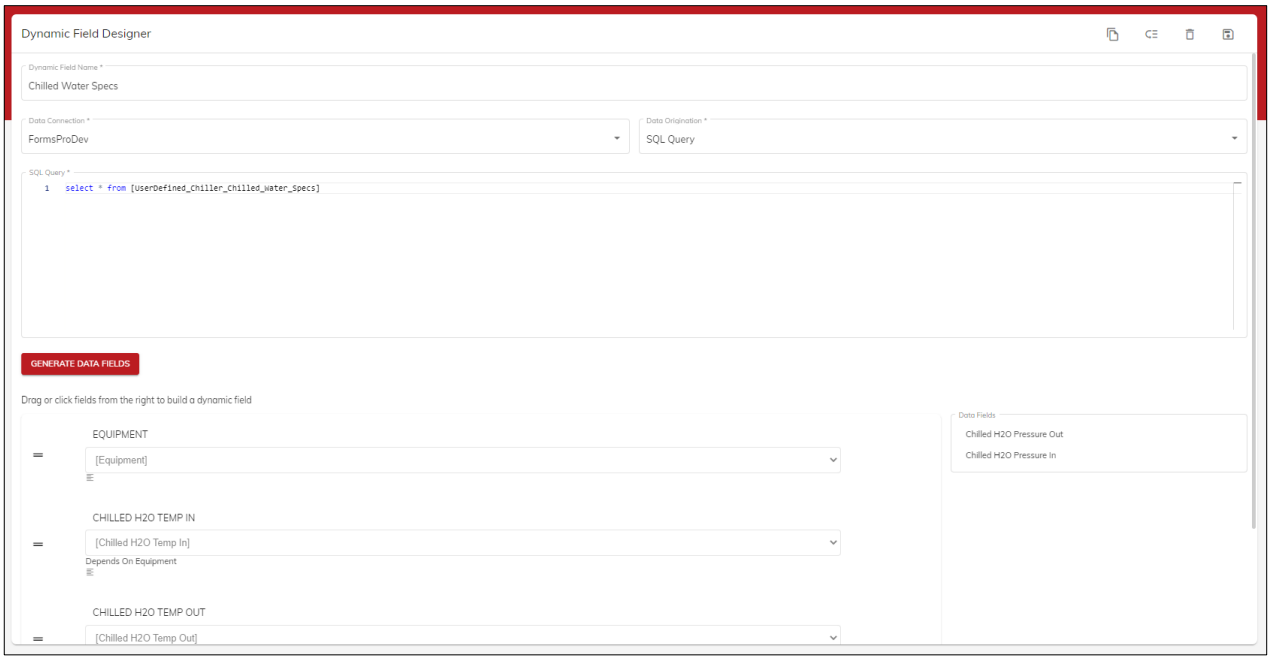
If you are creating a small table, you can enter all the data directly into the Benchmark Table Designer instead of importing the spreadsheet. Once you have your columns defined, click (Save).

10. Click (Save) to save your benchmark table data.

ADD BENCHMARKS TO YOUR FORM

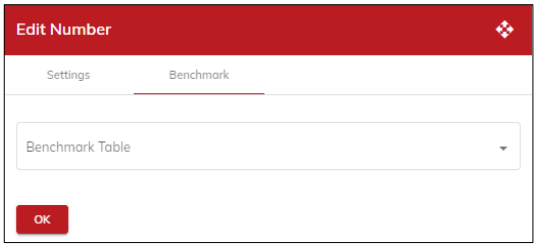
Once you have your table set up, you can add the benchmarks to your form.

Before you start, you'll need to be sure the key field for the benchmark table is on the form. This field must be a text or a dynamic field; and must be outside of a static table if you're using a table for the data entry. Because the entry must be the same as the data in your key field column (including case and spaces), we recommend creating a dynamic field for this field if it isn't one already.

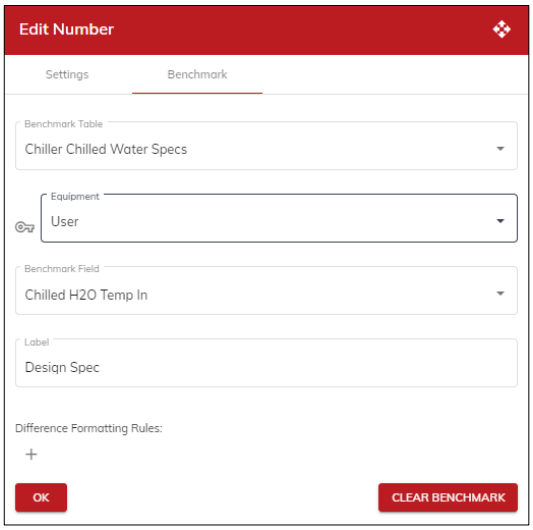


The benchmark is added to individual number or text inputs on a form. The steps are the same if you're adding benchmarks to a static table for a number or text cell in the table.

1. Drag a number or text input onto your form or select a text or number type for the cell in a static table.
2. Click **Edit** to open the Edit Number or Edit Text window.
3. Click **Benchmark** to open the Benchmark tab.

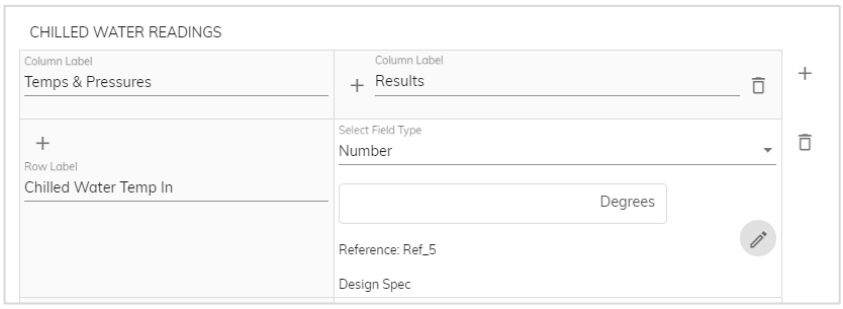


4. Select the benchmark table from which you want to display data from on the input.



5. Select the key field from the benchmark table that you want to use for this input. If you have multiple keys in your table, you will have multiple fields to select. You must have at least one selected.
6. Select the benchmark field from the table to use to display information for in the form. The list displays all the column names.
7. In the **Label** field, provide a label that will be displayed on the form, and is used to describe what the entry next to it is for. For example, if your benchmark table is a set of design specifications, you can label the benchmark "Design Spec." Or if these are starting values, or expected values, you can label the information as such. Each benchmark can have a separate label.
8. Click **OK** to save your changes.

   When the Edit Number or Edit Text window closes, you will see the label you entered under the field for reference.



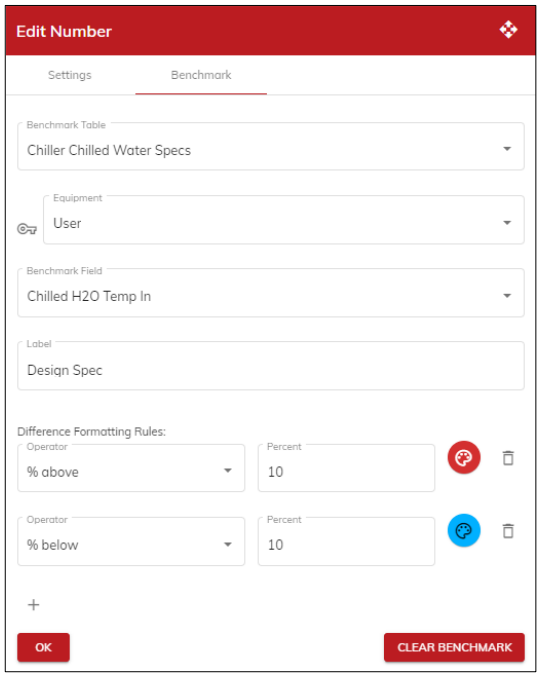
ADD COLOR FORMATTING TO FORM BENCHMARKS

For each benchmark, you can select color formatting that appears in the app to indicate that the entry is outside of a tolerance range, or if it's different than the benchmark. This formatting is separate from the formatting in the field entry, and appears under the entry field on the app, and can be placed *only* on numeric inputs.

1. Complete the previous steps 1-7.
2. In the Edit Number window click the plus symbol under the Difference Formatting Rules field.
3. Select the operator you want to use for the formatting:
   - equals – this add a color outline when the benchmark and the input entry are the same.
   - does not equal – this adds a color outline when the benchmark and input entry are not the same.
   - % above – this provides an additional field to enter a number to calculate a percentage over the benchmark. If the input entry is over the benchmark by that percentage, the color outline is added.
   - % below - this provides an additional field to enter a number to calculate a percentage under the benchmark. If the input entry is under the Benchmark by that percentage, the color outline is added.

   You can add additional formatting rules to create a range or tolerance.

4. Select the outline color.



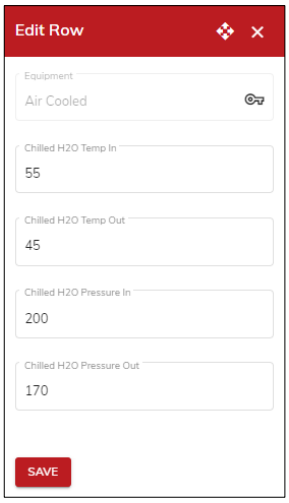
5. In the mobile app, when the entry meets the formatting rules, you'll see a color outline around a small description of the formatting difference, so that the mobile user understands the reason for the color formatting.

EDITING A BENCHMARK TABLE

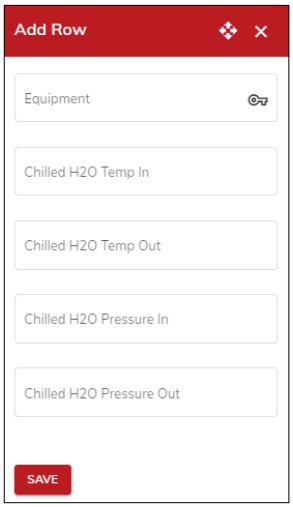
You can edit the benchmark table data in one of two ways: import it using the spreadsheet, or manually update a row.

Update using a spreadsheet Make the changes to your spreadsheet, save your changes, then click (Import Spreadsheet) to import the data and select the spreadsheet. Depending on the extent of your changes, you can either append/update your table data which will make changes only; or overwrite existing, which will overwrite the entire table data with your spreadsheet. Click **Import Spreadsheet** and the updates are made to the table.

Update manually Click a row and the Edit Row window opens.



Edit the field in the table you want to update and click **Save**. The change is made to the table. You can also add rows by clicking (Add) and enter the row in the Add Row window.



To delete a row, click (More) and then **Remove**.

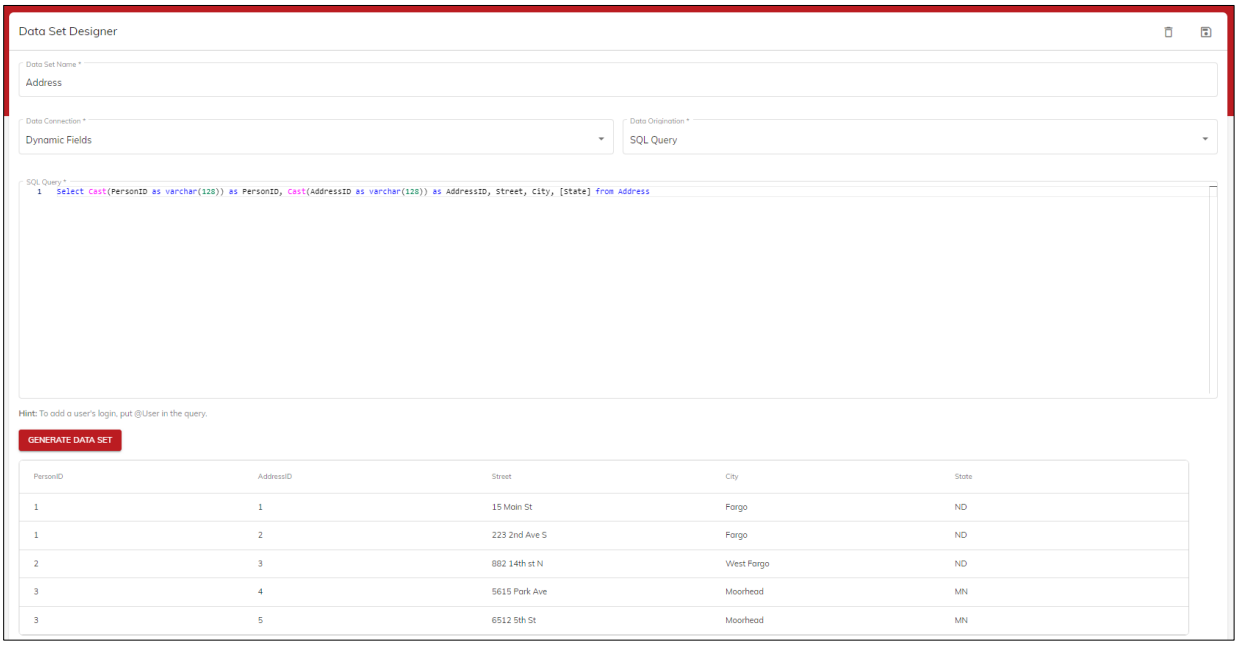
DATA SETS

Data sets allow you to populate a grid with all the relevant data from another source applicable to a form. For example, you may have a customer with 5 contact records. Once the customer is selected on a form, the table would fill with all 5 of these contacts.

A data connection needs to be set up to retrieve the information from the primary source. Then you can create data sets of information that are pulled from that source to be used on a form.

Data sets can also be used when filling a dynamic table. You can select which data set fields to be shown in a dynamic table. The data set can be filtered by connecting form fields to the data set. If the data in data sets are editable, they are editable in the dynamic table as well. Sub-tables can be a field type of a dynamic table, which is opened from a row or column. A sub-table can contain a sub-table and there is no limit, other than what is usable on the device and report.

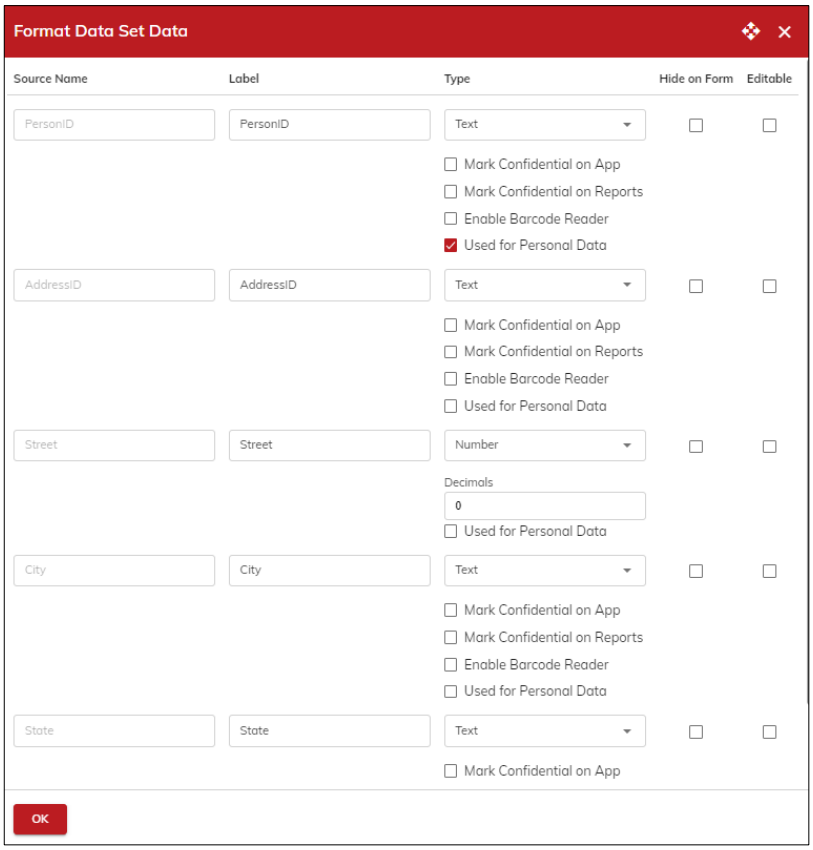
1. From the **Reusable Components** menu, select **Data Sets**. Click **New Data Set**. The Data Set Designer opens.



2. Enter a unique name for the data set.
3. Select the data connection from which the data is pulled.
4. Select the data origination. Selections include **None**, **SQL Query**, **HTTP GET** and **XML Query**.
5. Enter the query or proc that will be used to retrieve the data fields.
6. Click **Generate Data Fields** to run the query and display a subset of the data to help you determine whether the query is correct. If the data retrieved does not return any rows it displays a row of sample data. The Format Data Set Data window can still be used.

   If you edit the query, click the **Generate Data Fields** button again to display the changes in the data.

7. Select the Edit icon next to the data set to open the Format Data Set Data window. This window provides the ability to change the labels for use on the app and set a type for the column so the fields can be used like regular inputs in FormsPro tables. This ensures the information entered matches the data in the originating system and prevents users from entering information that doesn't make sense or isn't acceptable for that field.



8. The **Source Name** field displays name generated from the data set.
9. Enter a label for the app user in the **Label** field. If you enter a duplicate label, it will be numbered.
10. Select the type and options for each field. Types include Checkbox, Date, Lookup, Long Text, Number, Radio, Select, Text, and Time. Depending on the type you select, the options for the field will vary.

    These settings are not editable when designing the form. If you must make changes, you need to do it here, then fix your form. We recommend testing your dataset on a test form before creating forms you want to use.
11. Specify if the default field on the form is hidden. This controls how it is defined on a form and cannot be changed by the form designer. You might use a hidden field when you have a GUID or other type field that part of determining your data set but isn't useful for the form user.
12. Mark **Editable** if the field on the form is editable. Editable fields will automatically update the data source when the form is submitted. Be careful to only mark this for fields that the source allows edits on. Some key fields should not be marked editable because of the other purposes they serve.

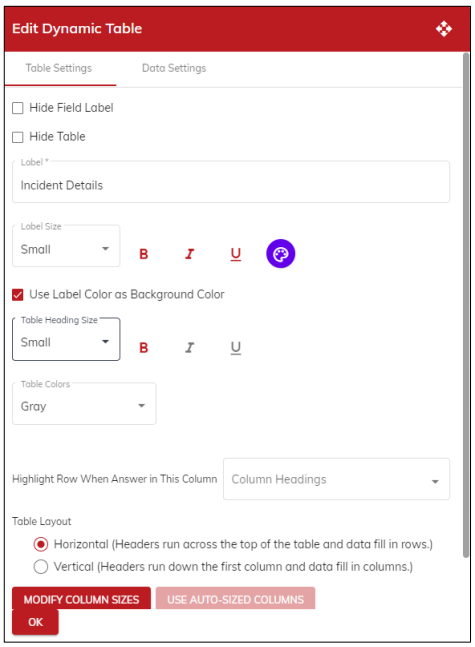
    If you need different settings for hidden and editable fields on different forms, create a second data set with those setting changes and use it on the different form.
13. Click **Save**.

Be careful when setting up this information. The data types are not verified that they match, so the integration could fail. For example, do not have a Select type with a number field.

ADDING A DATA SET TO A DYNAMIC TABLE

A data set can be used to fill a dynamic table.

1. Add the dynamic table to a form.
2. Click the Edit button for the dynamic table to open the Edit Dynamic Table window.



3. Specify the table layout.

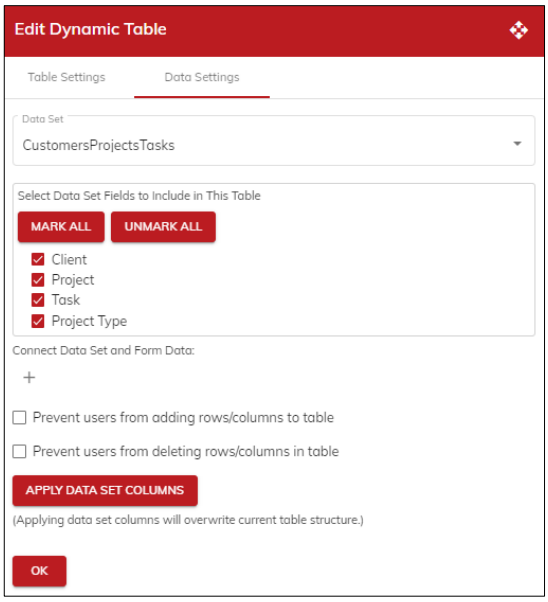
   Select **Horizontal** if you want the table headers to be at the top of the table and data fill the rows.

   Select **Vertical** if you want the table headers to be in the first column of the table and data fill the columns.

4. If you want to modify the column width, click the Modify Column Sizes button to open the Resize Table Columns window. This window displays a “preview” table where there is a number field at the top of the table header where you can enter a pixel number, or you can drag the column width to the size you want.

   If you want to revert the changes you’ve made, click the **Use Auto-Sized Columns** button. Once the columns are reverted, this button is disabled again until you click the Modify Column Sizes button.

5. To add a totals row to the bottom of your table, mark the **Use Summary Row** checkbox.
6. Mark the **Hide Summary Row on Form** checkbox to hide the resulting summary information from the app user.
7. Click the **Data Settings** tab to add a data set to the dynamic table.



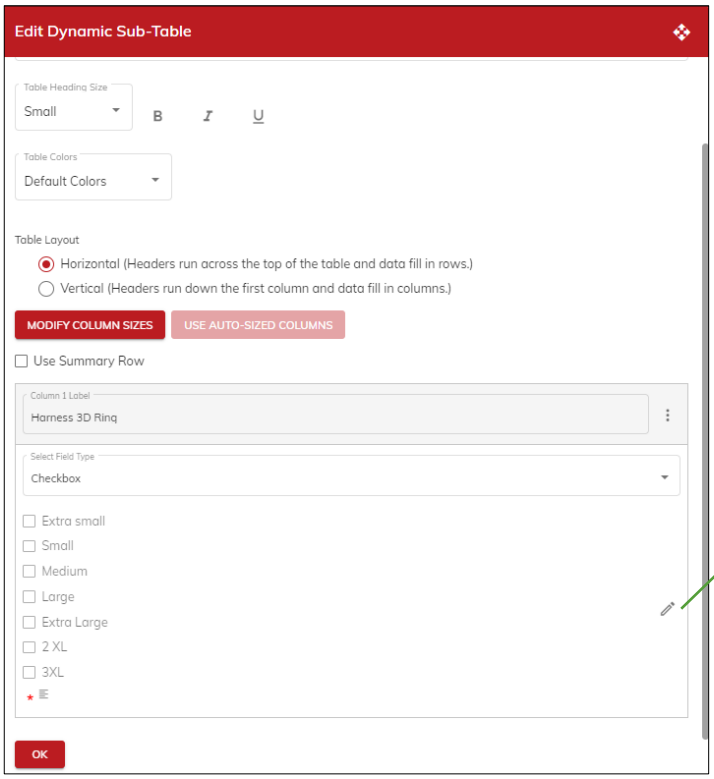
8. Select the data set you want to use.
9. Mark the data set fields you want to include in the dynamic table.
10. Click the add button to connect the data set with the form data. Select the field on the form that filters the data, then select the key/primary data set field. For example, the data set is equipment records. You would enter a customer location as the form field and the equipment ID as the data set field. This would limit the data set table to the equipment at this customer location.
11. Mark the **Prevent users from adding rows/columns to table** option to remove the add button so rows/columns cannot be added.
12. Mark the **Prevent users from deleting rows/columns in table** option to hide the trash/delete icon in the app so app users cannot delete any lines.
13. If you have a data table set up in a dynamic table and you change the data set, click the **Apply Data Set Columns** button to apply the changes without having to delete the dynamic table and start over. If you have columns in the dynamic table that you have added that are not part of the data set, they will be retained at the far right of the table. They can be moved to the preferred location of the column order in the table. Any changes you make to a data set require that you go into the data set of the form and click the Apply Data Set Column button for the changes to take effect.

ADDING A SUB-TABLE TO A DYNAMIC TABLE

A sub-table can be added to dynamic table.

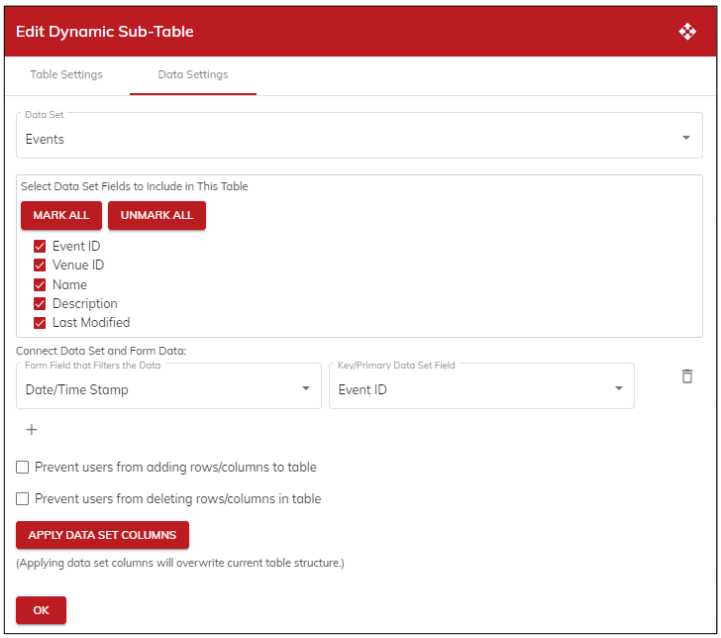
1. If you want to add a sub-table to a dynamic table, select **Dynamic Table** as the field type.

2. Click the edit icon next to Dynamic Table to open the Edit Dynamic Sub-Table window, where you can define columns for this sub-table.



Click the edit icon to open the Edit Checkbox window to make the checkbox selections required. The sub-table appears with an asterisk in the lower left corner to indicate it is a required field.

3. Mark the **Match Primary Table Formatting** option to use the same formatting as the primary table.
4. Click the **Data Settings** tab to define a data set for the sub-table. This window functions exactly as it does on the parent table to which it is attached.



5. Click **OK**.

DYNAMIC FIELDS

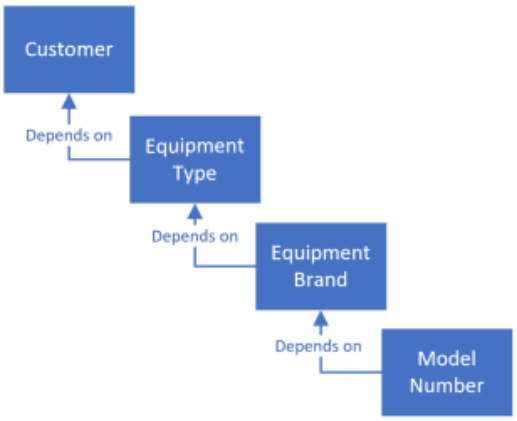
Dynamic fields are used to pull data from another source onto a form. For example, to use the customer name on an inspection form, you can get the customer name from your field service management solution along with the site address for the inspection by creating a dynamic field for the name and address that can be added to a form. Then, during the inspection, the technician can select the customer name from a list of customers while completing the form. Also, because the address is associated with the customer name, the tech can select the site address from a list of addresses associated with the customer.

Data connections must be set up before you can add dynamic fields.

Dependencies for dynamic fields can be "stacked" to depend on more than one selection. This allows you to further limit the options available for easier entry on the form.

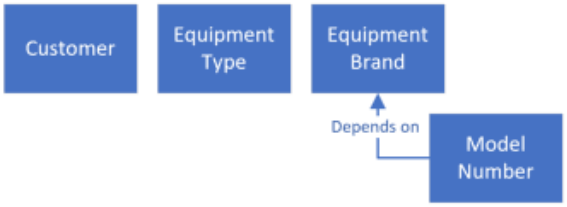
For example, you may be using a dynamic field to capture equipment information for a customer. You can set up a dynamic field with customer, equipment type, brand, and model number.

If you stack your dependencies, the options available for the app user are limited by the dependency above it:



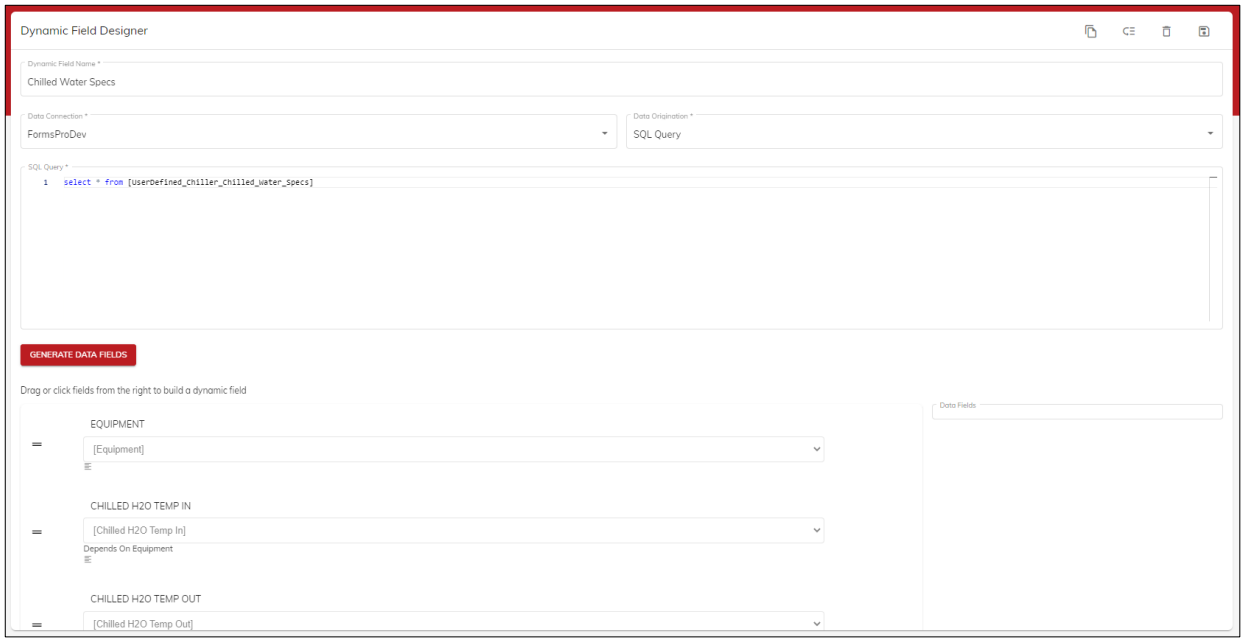
In this example, after selecting a customer, only the equipment types set for the customer are available. Then, only the brands available for that equipment type for that customer, and so on.

If you didn't stack by placing dependencies only on certain components, the options would be less limited:

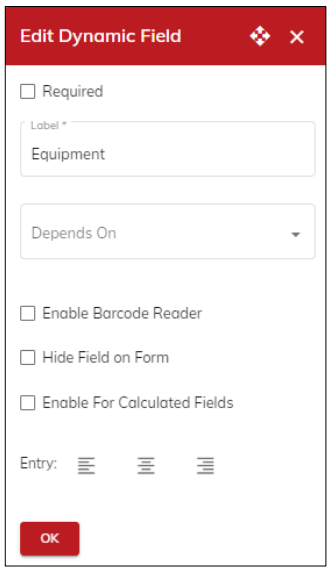


Here, you only limit the model numbers available for the equipment brand selected. The list of brands and equipment types would not be tied to the option above it. You'd see a list of all equipment brands you have, rather than just those associated with the types for the customer.

1. From the **Reusable Components** menu, select **Dynamic Fields**. Click **New Dynamic Field**. The Dynamic Field Designer opens.



2. Enter a name for the dynamic field. Use a descriptive name that can help identify the field or fields it will add to a form, such as Customer Name Address for a customer name and address set of fields.
3. Select the data connection that the data is pulled from and the data origination for the method of the connection.
4. Enter the query or proc that will be used to get the data fields.
5. Click **Generate Data Fields**. The fields from the query appear in the Data Fields list on the right.
6. Drag or click the fields you want to display on a form into the box. Multiple fields can be added but are always considered one dynamic field. You can reorder the fields using the handles.
7. Click **Edit** to open the Edit Dynamic Field window.



8. Mark **Required** if you want the dynamic field to be a required field. An individual data field can be marked required regardless of the entry in the Depends On field or any other data in the dynamic field.
9. Create dependencies by selecting another data field from the **Depends On** list. On the app, the selections available for this field depend on the selection made for the Depends On field.

   For example, you've added Customer Name and Site Address as dynamic fields. If you edit the Site Address field to depend on Customer Name, only the Site Addresses available for the Customer Name selected appear in the list. If you don't create the dependency, all site addresses regardless of the customer name would be available for selection on the form.

   Dependencies can be stacked by continuing to have fields depend on another field. For example, if you also have Equipment in this conditional field, if you set the Equipment to depend on Site Address, only the equipment for the selected site address for the selected customer appear in the Equipment list.
10. If your data is integrated with a barcode, mark **Enable Barcode Reader** to enable a barcode reader for any text or long text input field type. This adds a Barcode Reader button on the field in the app which, when clicked opens a barcode reader/camera which can be used to scan the barcode and provide an entry into the field on the form. If the data for the field is not associated with a barcode, the numbers on the barcode will be displayed.
11. Mark **Hide Field on Form** to hide any field included in a dynamic field on forms in the app. This is useful if you have a field you want on a report but isn't necessary for the app user. Hiding a dynamic field is especially useful for email addresses, because when you add an email address as a dynamic field, the form automatically creates a checklist of addresses to select for emailing the form. However, the dynamic field used to create the checklist is also on the form creating duplicate information. If you mark this option on an email field, the checklist remains on the field, but the text field for the dynamic field is hidden.
12. Mark **Enable for Calculated Fields** to display the label of the data field in the Available Fields list to select as a calculated field input. If the dynamic field is part of a table, the label of the field is displayed
13. Click (Save) when you've completed the dynamic field. The dynamic field is now available to add to a form.

    TIP: There is a simple way to create a dynamic field for benchmarks if you don't know how to write SQL queries and the data is fairly static, as long as you've already set up your data connections to a SQL query. Name the dynamic field, select that connection, and enter a SQL query similar to the following:

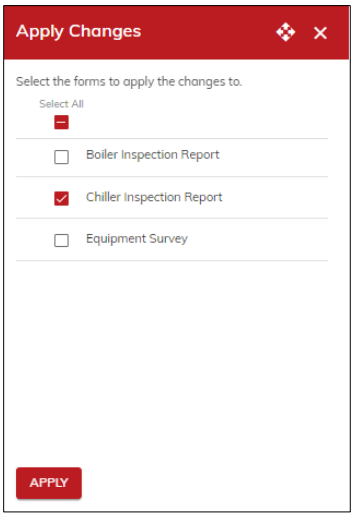
    Select * from [UserDefined_BenchmarkTableName]

    BenchmarkTableName is the name of your benchmark table. Use underscores in place of spaces if you have them in your name. Then, click **Generate Data Fields** and the columns of your data table appear as data fields. Drag on the key fields you want to use to get data from the table and click **Save**.

EDITING DYNAMIC FIELDS

Dynamic fields can be edited as your data changes. You can choose which existing forms your changes will apply to.

1. From the **Reusable Components** menu, select **Dynamic Fields** then click the field you want to edit. The Dynamics Field Designer opens.
2. Make any necessary changes.
3. Click **Save**.
4. Click (Apply Changes) to open the Apply Changes window.



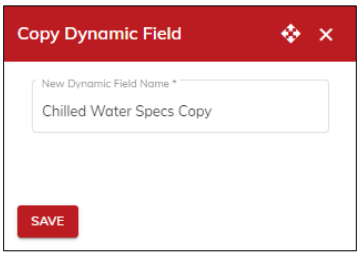
5. Select which existing forms with this dynamic field you want to apply the changes to. The next time the app users sync their device, the updated dynamic field will appear on the forms. If you don't apply changes, those forms will continue to use the dynamic field as it was prior to making these changes.

   TIP: Changes can be applied later by skipping step 4. For example, if you want to wait to apply changes until all forms are submitted for the day and doing that step later.

COPYING DYNAMIC FIELDS

You can use an existing dynamic field as a template if you have similar dynamic fields with slightly different requirements.

1. From the **Reusable Components** menu, select **Dynamic Fields** then click the field you want to copy. The Dynamics Field Designer opens.
2. Click (Copy) in the toolbar to open the Copy Dynamic Field window.



3. Enter a new name for the dynamic field you are copying.
4. Click **Save**.

DELETING DYNAMIC FIELDS

Dynamic fields can be deleted if they are no longer used on forms. A message appears if the dynamic field exists on a form preventing you from deleting it.

1. From the **Reusable Components** menu, select **Dynamic Fields** then click the field you want to delete. The Dynamics Field Designer opens.
2. Click **Delete** to delete the dynamic field.

REUSABLE SECTIONS

The Section Designer allows you to create a form section that can be used on multiple forms. By using sections, you can add a reusable component that groups several fields and allow them to be saved together, then added to any form.

1. From the **Reusable Components** menu, select **Sections**. Click **New Section**. The Section Designer opens.

2. Enter a name for the section you are creating. Use a descriptive name that can help identify the section when adding to a form. For example, Employee Profile might be a good name for a section that contains employee personnel information such as address, payroll, and benefit information.

3. Add input types to the section. Sections can contain any input type, except page breaks, and can contain or be in conditional fields. Click the Edit button to enter a label and select other options for the input. Any formatting options you set here are used as a default on the form, they can be changed on a per-form basis using the Forms Settings pop up for the form.

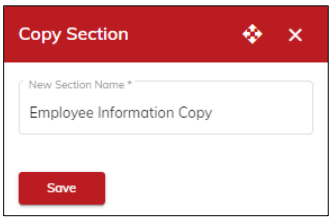
4. Click (Save) when you've completed the section.

COPYING SECTIONS

You can use an existing section as a template if you have similar sections with slightly different requirements.

1. From the **Reusable Components** menu, select **Sections** then click the section you want to copy. The Section Designer opens.

2. Click (Copy) in the toolbar to open the Copy Section window.



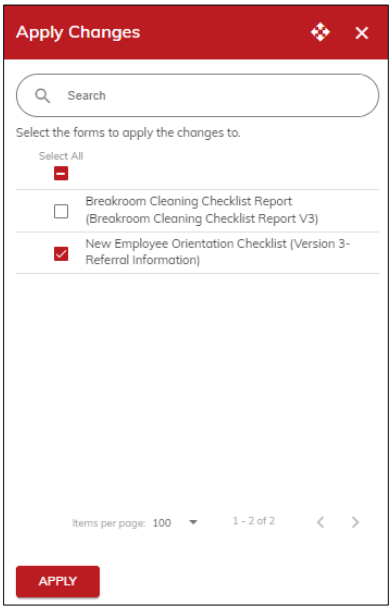
3. Enter a new name for the section you are copying. And make any necessary changes to the new section.

4. Click **Save**. The newly copied section appears under the Sections list in the left menu. It can now be used on forms.

EDITING SECTIONS

Sections can be edited as your needs change. After making your section changes, you can choose which existing forms to apply the changes to.

1. From the **Reusable Components** menu, select **Sections** then click the section you want to edit. The Section Designer opens.
2. Make any necessary changes.
3. Click **Save**.
4. Click (Apply Changes) to open the Apply Changes window.



5. Select which existing forms with this section to which you want to apply the changes. The next time the app users sync their device, the updated section will appear on the forms. If you don't apply changes, those forms will continue to use the section as it was prior to making these changes.

   TIP: Changes can be applied later by skipping step 4. For example, if you want to wait to apply changes until all forms are submitted for the day and doing that step later.

DELETING SECTIONS

Sections can be deleted if they are no longer used on forms. A message appears if the section exists on a form preventing you from deleting it.

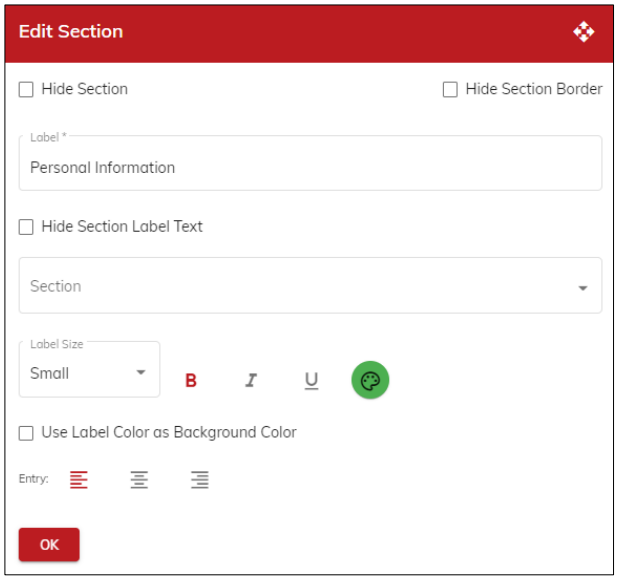
1. From the **Reusable Components** menu, select **Sections** then click the section you want to delete. The Section Designer opens.
2. Click **Delete** to delete the section.

A section cannot be deleted if it exists on a form. Click (Apply Changes) in the toolbar to see which form(s) the section exists on.

ADDING A SECTION TO A FORM

Sections appear as a field under the Actions/Container menu in the Form Designer. They can be added to any form.

1. From the Actions/Container menu on the right, select **Section** to add it to a form.
2. Click the Edit icon to open the Edit Section window.



3. Enter a label for the section. This label acts as a “header” for the section and can be used for collapsing the fields inside the section. Formatting this label can be done here to make it appear like other headers in your form, but formatting done using Form Settings will format this like other labels in the form.
4. Mark **Hide Section** if you don’t want the section to appear in the app. If the section contains a required field, it cannot be hidden.

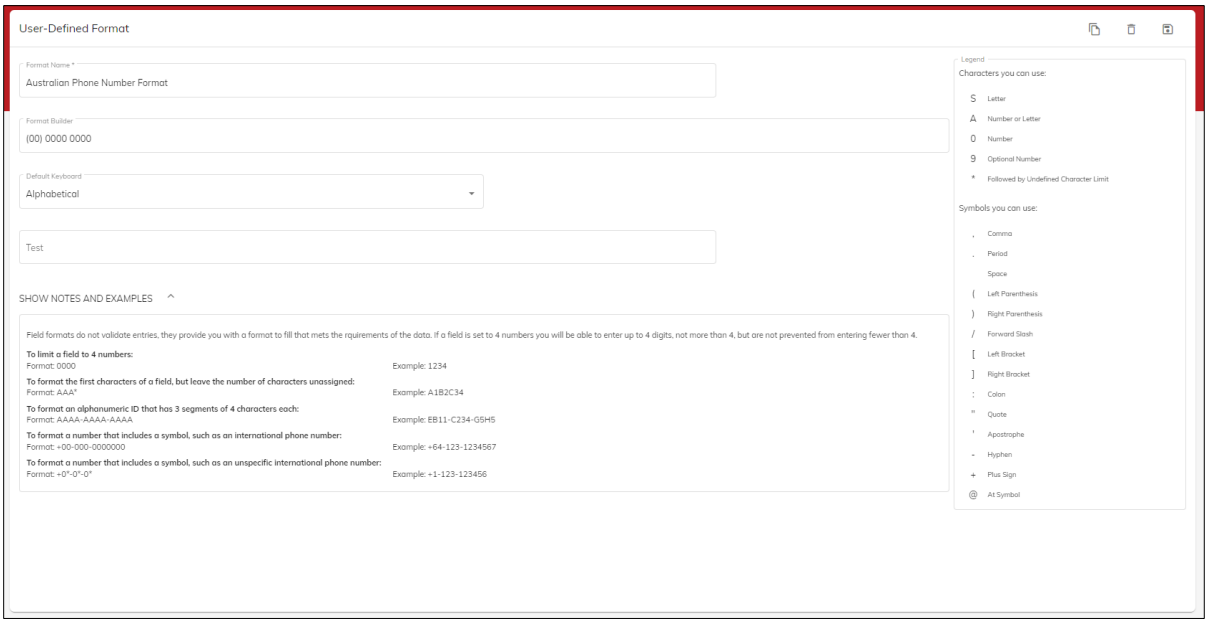
   Mark **Hide Section Border** if you don’t want the section border to appear in the app.

   Mark the **Hide Section Label Text** if you don’t want the section label to appear in the app. This can be helpful if you have a heading that has a similar name.
5. Select the section you want to add to the form.
6. Click **OK** to add the section to the form. If you add a section with the same name, the fields on the report will get a reference value, such as Employee Name_1.

USER-DEFINED FORMATS

The User-Defined Format page allows you to format commonly used fields so that you can easily enter appropriate data.

1. From the **Reusable Components** menu, select **User-Defined Formats**. Click **New Format**. The User-Defined Format page opens.



2. Enter a name for the format you are setting up. You cannot enter duplicate format names; each format name must be unique.
3. Using only the characters and symbols defined in the legend, enter the components of the format.

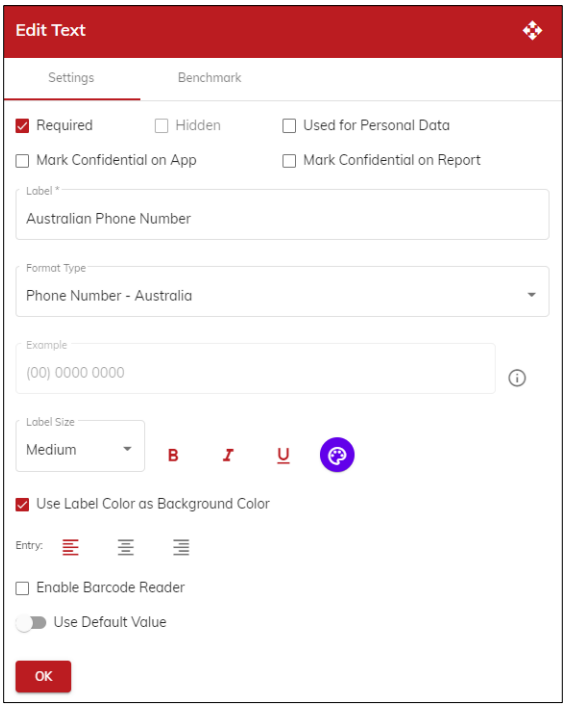
   Any characters that are entered in the **Format Builder** field, the equivalent is typed in the actual field. However, symbols entered in the Format Builder field appear in the field as part of the format, so you do not need to enter them.

4. Select the keyboard type to use when entering information in the field: **Alphabetical**, **Numeric** or **Phone**.
5. Enter a test entry to confirm it works. Based on your entries in the Format Builder field, you can enter letters, numbers, or symbols.
6. Save your entries. The user-defined format is now available to add to a form.

ADDING A USER-DEFINED FORMAT TO A FORM

User-defined formats can be added to a text field on a form.

1. From the **Form and Report Designer** menu, select the form to which you want to add the user-defined format.
2. Drag the **Text** input onto the form from the menu on the right. You can also click on the **Text** input in the menu, and it will insert at the bottom of the form.
3. Click the **Edit** icon to open the Edit Text window.



4. Mark **Required** if this field is a required field on a form. Enter a label for the text field, then select the user-defined format.
5. Mark **Hidden** if you don't want the text field to appear in the app.
6. Mark **Used for Personal Data** to delete specific fields off a form. By checking this option, non-personal data is kept for analysis, while deleting the personal data.
7. If this field contains confidential information that you don't want to display in the app or in reports, select **Mark Confidential on App** and/or **Mark Confidential on Reports**.
8. Click **OK** to save the text field settings.
9. Click **Save** in the form window. You can now enter information for this field in the app.

FORM AND REPORT DESIGNER MENU

Use the Form and Report Designer menu to create folders, create advanced and basic forms, deploy forms, and import/export forms.

FOLDERS/SUBFOLDERS

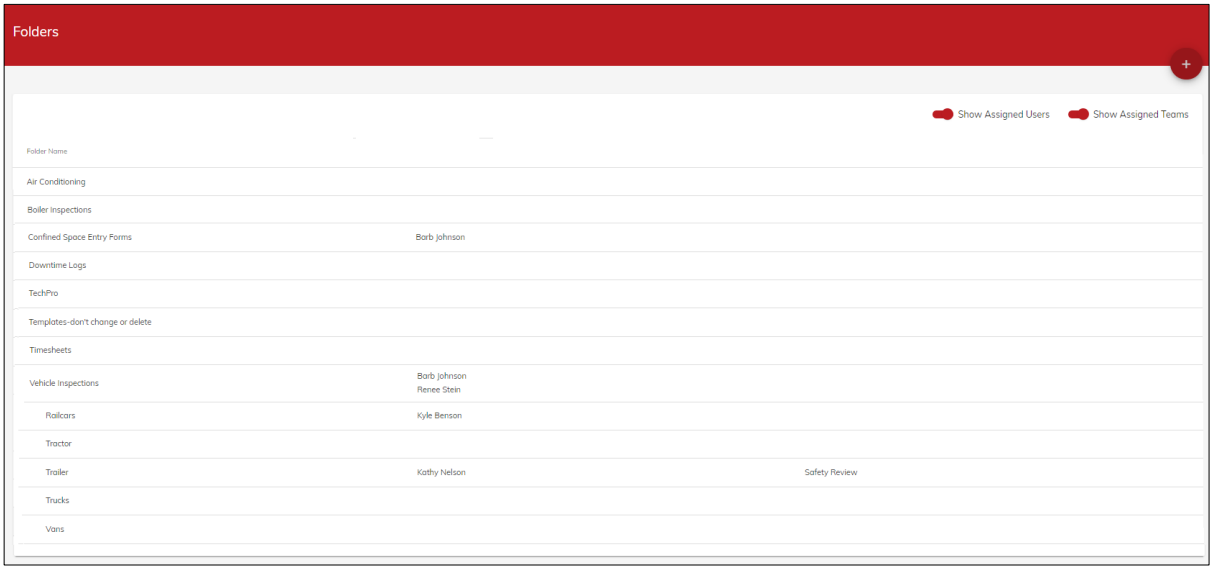
Folders provide optional organization for your forms. You can create folders and subfolders to store your forms by function, person, or whatever method works for your organization. Once you've created a folder, you can save a form to it using the FormsPro Designer. Any form that is not assigned to a folder appears in the Forms list.

Access to forms is provided on a folder basis and is optional. Individual folders can have access limited by assigning users and/or teams to the folder. If folder access is provided, the Folder list on a form is limited to those the user has access provided. (If a user doesn't have access to a folder, they cannot see the folder in the list on the form to save the form to it.)

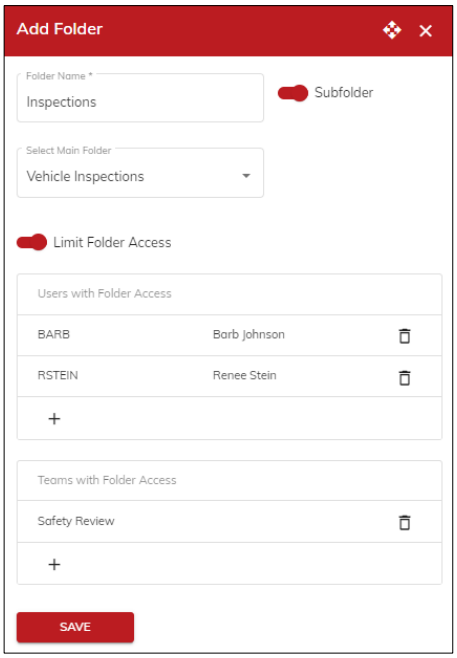
ADDING A FOLDER

The Folders page displays all the folders that have been set up, along with the assigned users and teams to the folders.

1. From the **Form and Report Designer** menu, select **Folders**. The Folders page opens.



2. Click the **Add** button to open the Add Folder window.



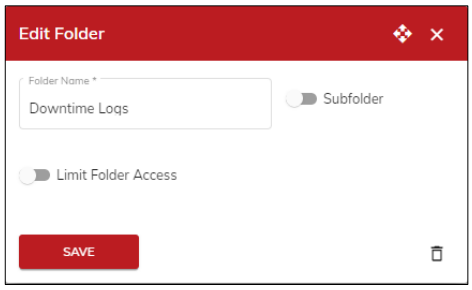
3. Enter a folder name.
4. If you are creating a subfolder, toggle the **Subfolder** option on, then select the main folder to which the subfolder belongs. You cannot select a subfolder as a main folder. Subfolders are only one level deep.
5. If you want to limit who has access to the folder, toggle the **Limit Folder Access** on, then select the users and/or teams for whom you want to limit access. If you leave this option toggled off, all users will have access to the folder. The permissions set up for the user determines where they can access the forms from. For example, a human resources user could see employee benefit form data from the HR folder in the View/Edit Submissions page but may not be allowed to create a new form.

   Allowing different users to access the forms they need is done in folders. Forms that are not in a folder are available to all users.
6. Click **Save**. You will see the name of the new folder/subfolder in the list on the left.

EDITING AND DELETING A FOLDER

Editing a folder name has no impact on the forms inside of it. Deleting a folder only deletes the folder. No forms are deleted, they will be moved to the Forms list automatically when the folder is deleted.

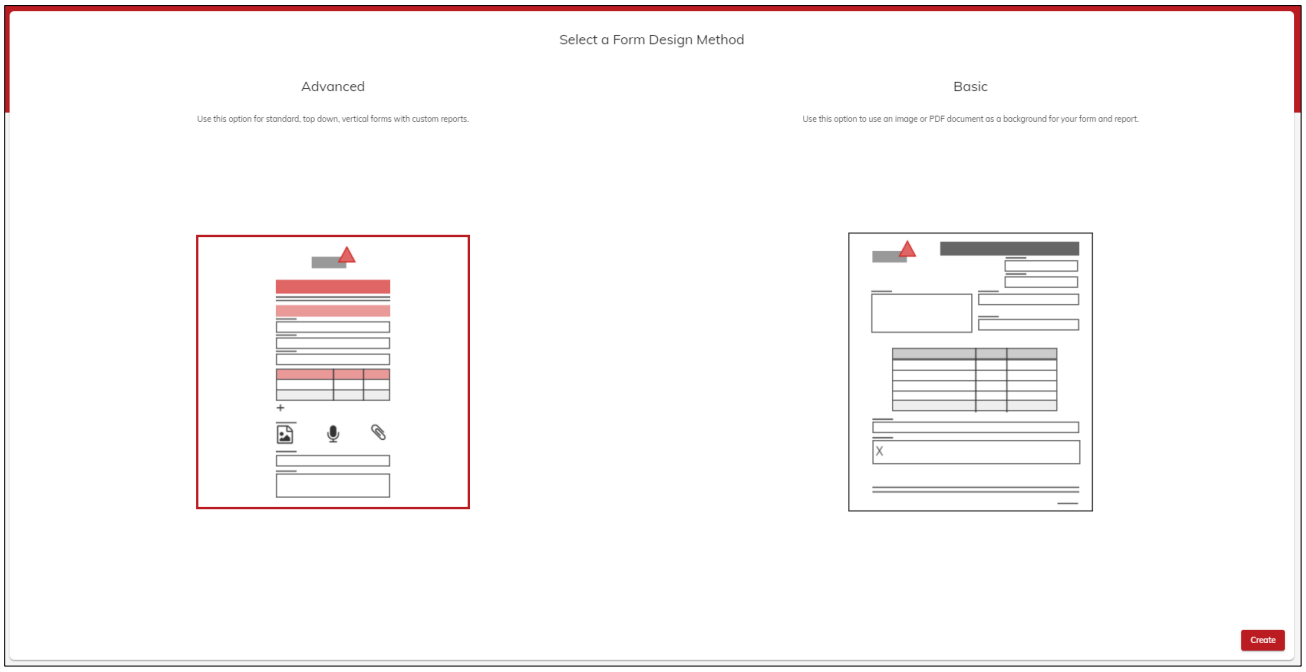
1. From the **Form and Report Designer** menu, select **Folders**. The Folders page opens.
2. From the Folder Name list, select the folder you want to edit or delete to open the Edit Folder window.



3. Rename the folder. The new name appears in the folder list on the left. To delete the folder, click the trash can icon. If you delete a folder that contains subfolders, those subfolders are deleted too.

NEW FORM

Creating new forms is as simple as starting a new form and dragging the input types onto it. Forms can be as simple or complex as you need. You can create an advanced form or a basic form. Advanced forms are designed in the standard, top down, vertical manner and create custom reports. Basic forms use an image or PDF document as a background for your form and report.



CREATING AN ADVANCED FORM

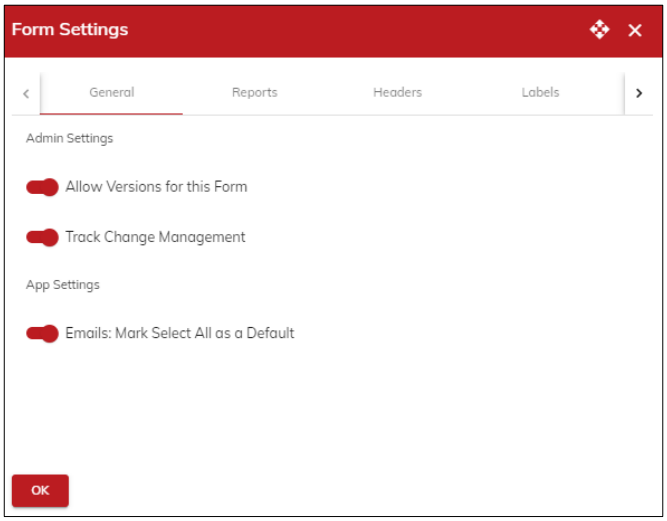
An advanced form is a standard, top down, vertical form that allows you to create custom reports.

1. From the **Form and Report Designer** menu, select **New Form**. The Select a Form Design Method page opens.
2. Click on the Advanced form icon, then click **Create**. The Form Designer opens.
3. Select Enter a name and description to identify the form. This information identifies the form in the Forms list on the admin site and in the app.
4. From the **Add to Description** list, you can select any field on the form to add to the description. The data for that field appears on saved forms in the mobile app to help identify the form.
5. Use the Select Folder list to choose a folder to save the form to. If you don't want to keep it in a folder, choose "Unassigned". You can always use this list to change the folder to which a form is saved.
6. To add your logo to the form, click (Logo) on the toolbar. The Logo Upload window opens.

Click **Upload Logo** and browse to the logo file. Then, select where you want to logo to appear; in the form header, footer, or both.

TIP: The logo is automatically sized on the Admin page to fit in the toolbar menu to show that you have a logo on the form. This is not the size the logo will appear on the form. The size of that logo cannot be changed, so be sure to select an appropriately sized logo file.

7. Click (Default Settings) on the toolbar to open the Form Settings window. This window is used manage versions and form changes, set default report and formatting options, copy history, and set data maps. Changing formatting on the headers, labels, and tables for the form is optional. Each individual header, label and table on the form can be changed as well, however, this option provides a consistent default for the form.



Form Settings Window Tabs for Advanced Forms

General	Toggle **Allow Versions for this Form** on to have different versions of the form. Toggle **Track Change Management** on to view each change that is made to the form after the first save of the form. Toggle **Emails: Mark Select All as a Default** on to automatically mark the Select All checkbox in the Emails section of a form.
Reports	**Use Basic Report** Each form can be set to use a basic report which creates a report .PDF using the inputs in the exact order they are on the form. This provides

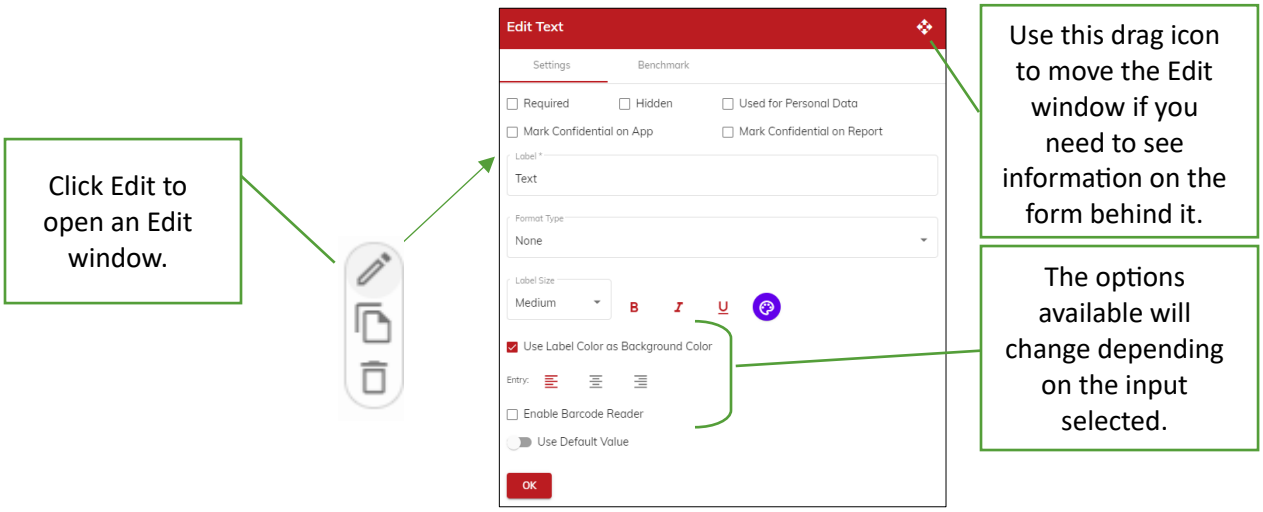
	an almost exact replica of the form on “paper”. If this option is selected, the Report Designer button is not available for the form. **Use Advanced Report Designer** Alternately, each form can have reports that can be oriented toward the report recipient, providing the information in a format they are accustomed to, or that contains only the information they require. (Data from the form is stored separately – it does not need to be on a report to be saved.) The Report Designer button is available. See the Report Designer section for information about using that tool. You must be using Advanced Reports to create multiple reports for a form. **TIP**: You can start with a basic report, then switch to Use Advanced Report Designer as your needs change. This will provide a basis for the report by providing all the fields from your form onto the report in the same layout. You can then move and remove information as needed. One thing to note, if you add fields to the form once you’re using the Advanced Report Designer, you will need to manually add the information to the report – it won’t be added automatically as it does with the basic report.
Headers	Choose the size, format, and color you want to use for all headings on the form. Click the color picker to choose a color. If you mark **Use Header Color as Background Color**, the header will appear with the color selected as a background, and the text will be the color of the palette in the color picker. The Color Picker automatically chooses white or black text based on the color saturation selected for the best text visualization. Unmark the option to change the header text to the color selected with no background color. A preview will show what your selections will look like on your form, so you can revise your settings until you like what you see. Click **Apply** to save your header settings. When you close the pop-up window, your form will use the options selected.
Labels	Choose the size, format, and color you want to use for all labels on the form. Click the color picker to choose a color. If you mark **Use Label Color as Background Color**, the label will appear with the color selected as a background, and the text will be the color of the palette in the Color Picker. The Color Picker automatically chooses white or black text based on the color saturation selected for the best text visualization. Unmark the option to change the label text to the color selected with no background color. A preview will show what your selections will look like on your form, so you can revise your settings until you like what you see. Click **Apply** to save your Labels settings. When you close the pop-up window, your form will use the options selected.
Tables	Choose the size, format, and color you want to use for all table row and column headings on the form.

	Select table colors, which will set your headings and alternate rows using varying degrees of one color. **Design Tip:** Table Headings use the 500-level color if you want to match the other labels and headings on your form to that. A preview will show what your selections will look like on your form, so you can revise your settings until you like what you see. Click **Apply** to save your tables settings. When you close the pop-up window, your form will use the options selected.
Copy History	Choose settings for copying data from a previous submission into a new form using the mobile app. See the Copying from History steps for setting up this functionality.
Data Maps	Choose settings to select fields on a form for which you want to use submitted data. See the Access to Form Data via Data Maps procedure for more information.
Deep Links	Choose settings to create deep links for form integrations. See the Building Deep Links procedure for detailed information.

8. Click **OK** to close the Form Settings window and view your default settings on the form. You should also click **Save** to save these settings on your form.

   If you change any of the default settings and click Apply for that tab in the pop-up window, any individual header, label, or table settings will be overwritten to the default settings you just applied.

9. Drag the inputs you want on your form onto the form from the menu on the right. You can also click on an input in the menu, and it will insert at the bottom of the form. Each input has different options available for additional formatting of the information you want entered on the form. See the Form Designer Inputs for Advanced Forms table for descriptions of each input type.



Each field can be marked as Required, which will prevent the mobile user from submitting the form on the mobile app until required entries are provided. Required fields are indicated with an asterisk, except fields in tables, which appear light red.

The Used for Personal Data setting is used to delete specific data from a form. By marking this option, non-personal data is kept for analysis, while deleting the personal data.

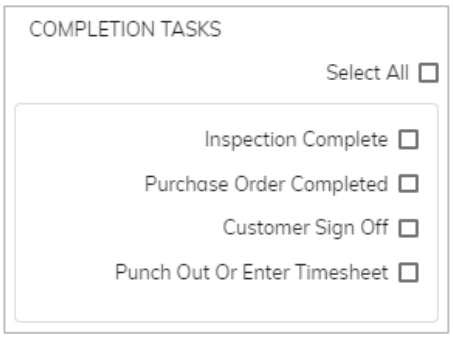
Every field requires a Label. Labels are important for identifying the data that needs to be entered, and for including data when creating emails, exports, and reports. Be sure your labels work for all these circumstances. Labels can be duplicated; however, when you're creating a report or exporting, the fields will be listed in alphabetical order rather than the form order, so you may not know which is which. An underscore and number will be added to any duplicate labels in the Report Designer, email creation, and in the export data.

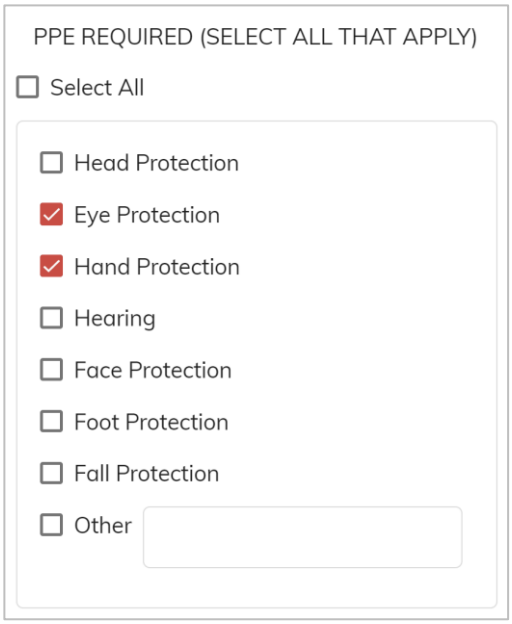
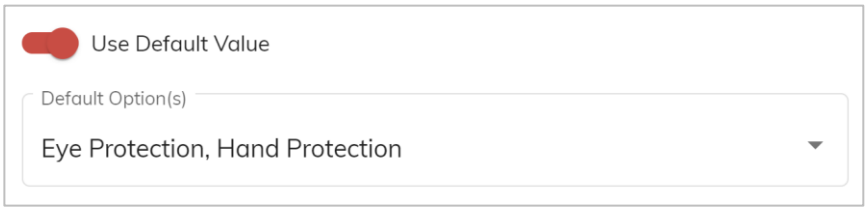
10. Once an input is added, it can be moved up or down on the form by clicking and holding the handles on the left of each input to drag and drop it to another location on the form.

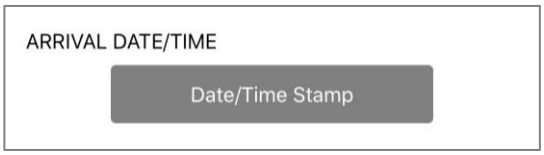
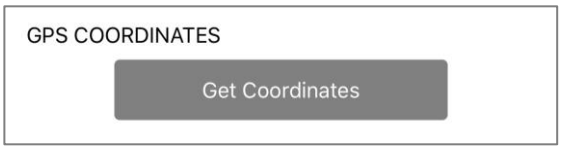
11. Use the Select Folder list to choose a folder to save the form to. If you don't want to keep it in a folder, choose "Unassigned". You can always use this list to change the folder to which a form is saved.
12. When you've completed designing your form, click (Save).

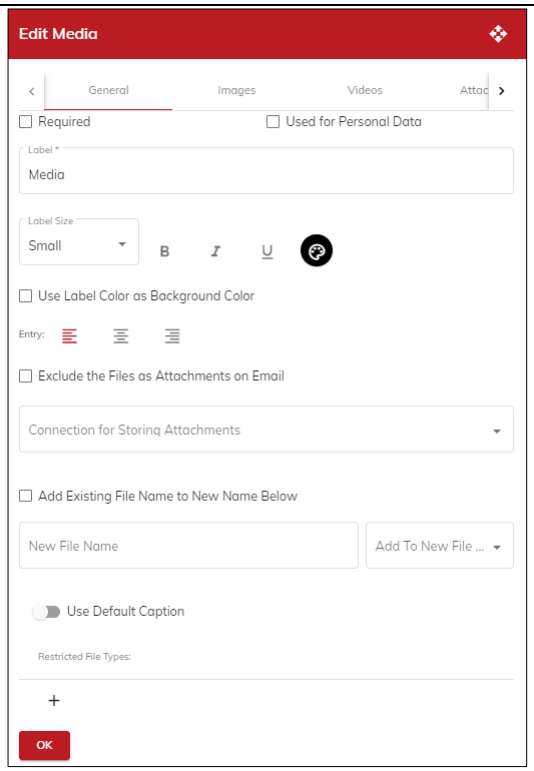
Form Designer Inputs for Advanced Forms

Formatting	Formatting options are used to provide structure to your form. They do not require a response on the form from the app user.
Auto-Incrementing Number	Inserts a user-defined number that increments when a form is submitted, when a form is dispatched or manually when clicking the Get a Number icon. Use the Edit Auto-Incrementing Number window to select the auto-incrementing number you want to add to the form. You cannot save a form that doesn't have an auto-incremented number selected.
Embedded Image	Inserts an image that displays on the form in the mobile app, rather than taken and uploaded from the device. This can be used for instructional or example purposes. All users of the form will see the image. Enter a label for the embedded image so there is a place to "anchor" the expand/collapse button. Click Edit to open the Edit Embedded Image window, then click Upload Image. Browse to the image, then click Open. The image appears in the window. Click OK. You can add a paragraph input before or after your image for text regarding the image.
Header	Inserts text to use as a heading for a portion of the report. Headers are used in the Table of Contents on the mobile app, as a means of "jumping" to another section of a form as well as a means of collapsing areas of the form when using the app.

	Click Edit to open the Edit Header window. Specify the text of the header using the Label field, select a size from extra-large to extra small and make any color specifications. Information following a header can be expanded/collapsed. Rules when collapsing headers include: • Information under a header is collapsed up to the next header if there is no page break. If there is a page break, the collapse stops at the page break regardless of if there is another header on the next page. • If there are no other headers, the remainder of the form is collapsed up to the Email area of the form. • If a header is in a condition, in can only be collapsed when the condition is shown, and when shown, it collapses only the area within the condition. • Headers with shown conditions are not collapsed if the header above it is collapsed. This prevents a header from over-taking the condition by hiding it. • Sections create their own headers and can be collapsed to the section label.
Page Break	Inserts a page break in the form. This provides multiple pages for the app user to navigate through and can be used to break up the form into manageable sections if there is a lot of data to enter. Page breaks do not have an edit window but can be copied or deleted.
Paragraph	Inserts long-form text you add to the form. This can be instructional text for the tech, or a disclaimer or any other text you want displayed on the form. Click Edit to open the Edit Paragraph window, where you can add links to external websites and select fields from the report as merge fields. Enter a label for the paragraph so there is a place to “anchor” the expand/collapse button.
Input	These fields require input from the mobile app user. Any of the inputs can also be added to a cell in a table.
Checkbox	Provides checkboxes for the app user to select. Checkboxes are used when more than one option can be selected, and you want all options to be presented. Click Edit to open the Edit Checkbox window. Enter a label for the group of checkboxes, then in the Options box, enter the text that will appear next to each checkbox. Put each option on a separate line. **Note**: If you justify a checkbox to the right, the box will appear to the right of the text: 

	Checkboxes can't be center justified. **Show Select All Checkbox** This option allows you as the administrator to determine whether a Select All option appears for a set of checkbox inputs. This allows you to control how the mobile app users can quickly check all boxes, or individually determine whether each is marked. **Add Text Field to Last Option** This option allows you to add a text field next to the last checkbox which allows the mobile user to enter additional text about the last option. For example, if your last checkbox is "Other, please specify." you can use this option to add the text right next to the last checkbox. On the mobile app, the checkbox group will look like this:  Select if you want the checkbox list to appear horizontally or vertically. You can mark options as a default, if a common set of checkboxes is typical for this form. Toggle on **Use Default Value**, then select the options from the list you want to appear marked when using the app. Defaults can be changed during form entry. 
Date	Inserts a date selector onto the form. Click Edit to open the Edit Date window and enter a label for the date. Dates can be entered 20 years into the future or 100 years to the past. Toggle on **Default Current Date on Form** to automatically insert the current date when the form is opened using the app. Defaults can be changed during form entry.
Date/Time Stamp	Inserts a single field for the date and time for entering the current date and time in a single click. Click Edit to open the Edit Date/Time Stamp window and enter a label for the

	date and time. On the mobile app, a button is added for the mobile user to click. Prior to clicking it will look like this on the device:  When the button is clicked, it cannot be changed; only deleted and re-stamped: 
GPS Coordinates	Inserts a button on the form that when clicked, finds the latitude and longitude for the app user. Click Edit to open the Edit GPS Coordinates window. Enter a label and whether the GPS coordinates for the app user are required for the form. This input looks similar to this on the mobile app, prior to getting the coordinates:  The coordinates are displayed on the form in the app and cannot be edited. The app user can click the map icon to double-check the coordinates. The information can also be deleted and retrieved again. 
Media	Provides an input for the technician to insert images, videos, attachments, and audio on the form. Click Edit to open the Edit Media window. On the General tab, enter the label information for the media.



Mark the **Exclude the Files as Attachments on Email** option if you do not want to include the attachment file on an email. This is useful when you don't want to send file to an end customer, or you know the attachments are too large for email, such as long videos. If you leave this option unmarked, the file attachments will be sent as attachments on the email, which is useful for customer-facing attachments, or when an email is sent internally to someone who may not have access to the storage location. When files exceed the limit set on email servers, no files are sent.

Select the attachment connection to use for storing the attachments.

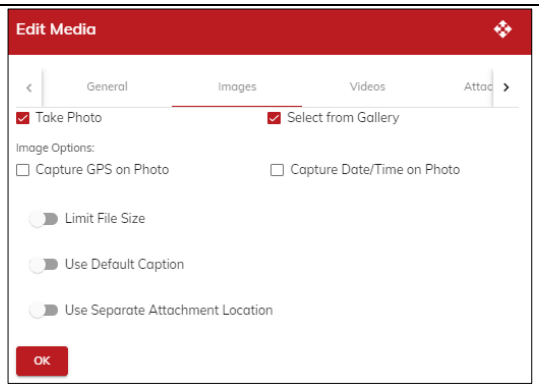
Mark the **Add Existing File Name to New Name Below** option to use an attachment's existing file name as part of the new name. In the **New File Name** field, name the attachments to identify the file in the connection folder. If the file name contains characters that are not acceptable by the storage solution, the unacceptable characters are replaced with an underscore. You can enter the form name if you want it to be part of the file name. If this field is left blank, the file name that exists is used. The extension of the file is maintained, regardless of the file name.

Note: If no attachment data connection is set up, fields and options related to anything other than a photo are disabled.

Toggle on the **Use Default Caption** option to use a default a caption for the attachment. The enter a caption in the **Default Caption** field.

Click the + button if you want to specify the types of files you don't want to be allowed for this input. In the **File Type** field enter the file types you don't want allowed on the form.

Click **Images** to open the Images tab.



Specify the type of image input you want to add to the form: **Take Photo** or **Select from Gallery.** Multiple images are allowed.

Mark the **Capture GPS on Photo** option to include the GPS coordinates of the person taking the photo. Mark the **Capture Date/Time on Photo** to include the date and time the photo was taken. Specify where you want the GPS and date/time information placed on the image. If the same placement is selected for both options, the GPS information will be above the date/time. Specify the attachment options and the connection for storing the attachments.

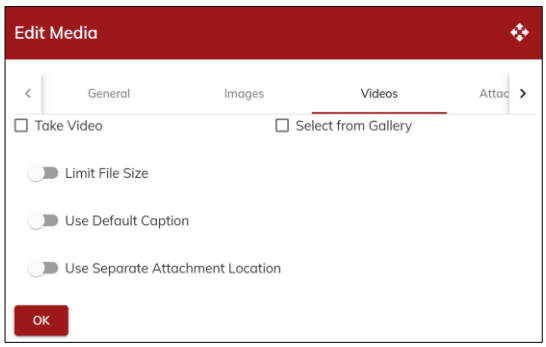
Note: Technicians will be prompted to turn on their device locations if they are not already turned on. If there are connection issues or other technical problems, “Location not found” is printed on the image.

Toggle on **Limit File Size** to specify the maximum file size for images. If an image is larger than the maximum file size it is deleted.

Toggle on the **Use Default Caption** option to use a default a caption for the image. Then enter a caption in the **Default Caption** field.

Toggle on the **Use Separate Attachment Location** option to add a separate location for images.

Click **Videos** to open the Videos tab.



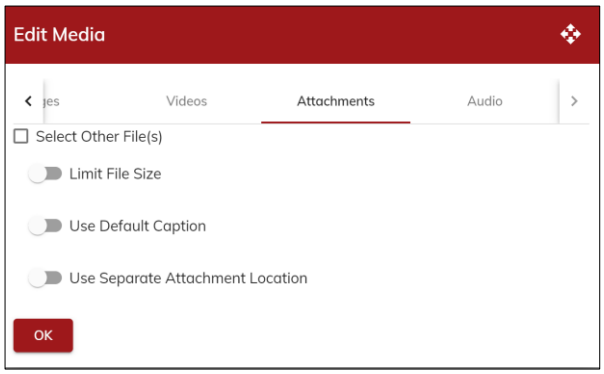
Specify the type of video input you want to add to the form: **Take Video** or **Select from Gallery.** Multiple videos are allowed.

Toggle on **Limit File Size** to specify the maximum file size for videos. If a video is larger than the maximum file size it is deleted.

Toggle on the **Use Default Caption** option to use a default a caption for the video. Then enter a caption in the **Default Caption** field.

Toggle on the **Use Separate Attachment Location** option to add a separate location for video.

Click **Attachments** to open the Attachments tab.



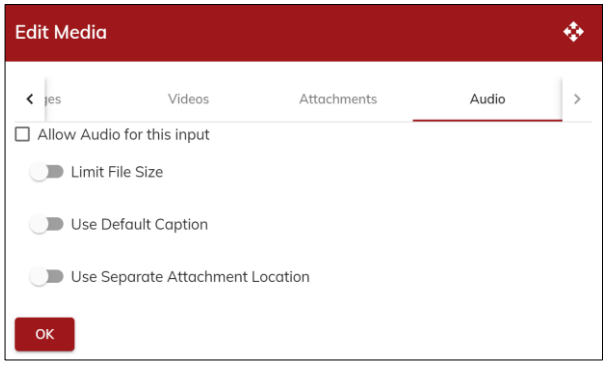
Mark **Select Other File(s)** to select other files.

Toggle on **Limit File Size** to specify the maximum file size for attachments. If an attachment is larger than the maximum file size it is deleted.

Toggle on the **Use Default Caption** option to use a default a caption for the attachment. Then enter a caption in the **Default Caption** field.

Toggle on the **Use Separate Attachment Location** option to add a separate location for attachment.

Click **Audio** to open the Audio tab.



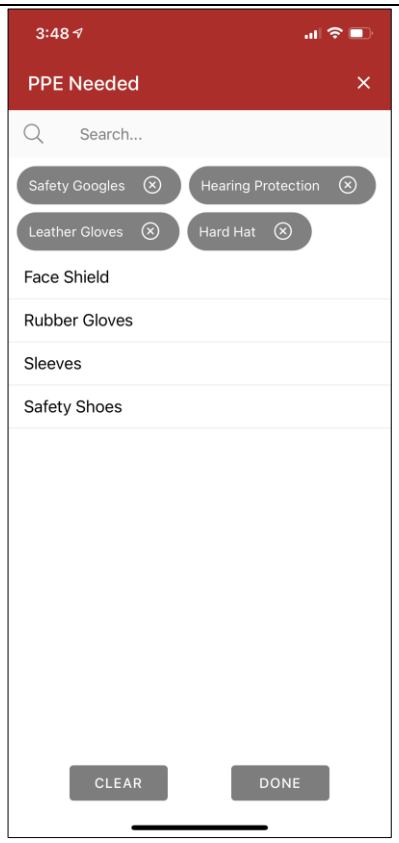
Mark **Allow Audio for this Input** to allow audio for the media input.

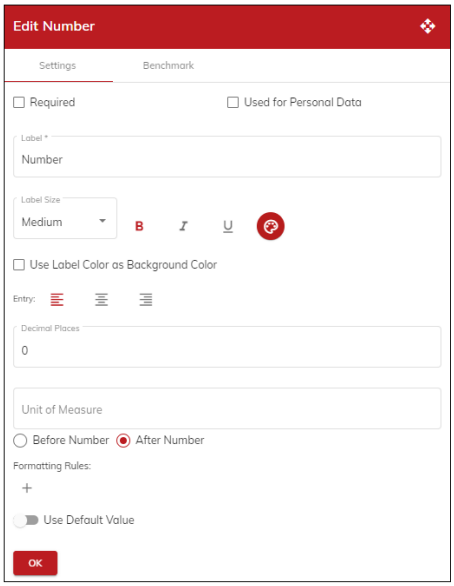
Toggle on **Limit File Size** to specify the maximum file size for audio. If an audio is larger than the maximum file size it is deleted.

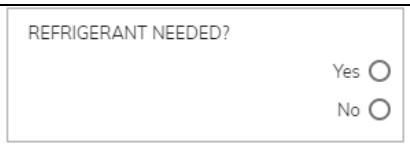
Toggle on the **Use Default Caption** option to use a default a caption for the audio. Then enter a caption in the **Default Caption** field.

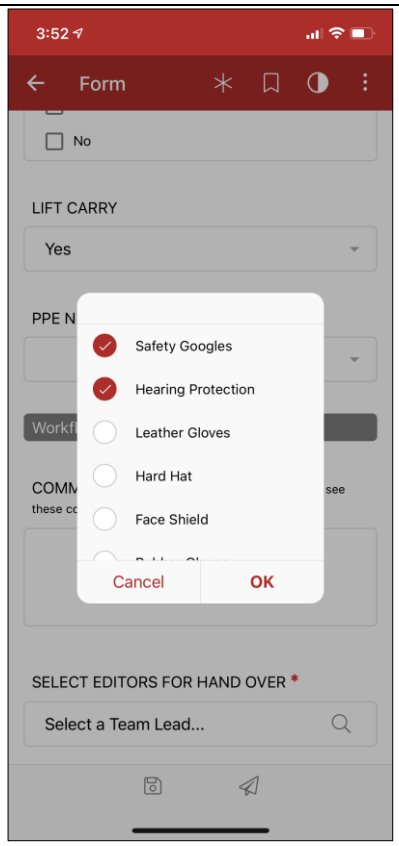
Toggle on the **Use Separate Attachment Location** option to add a separate location for audio.

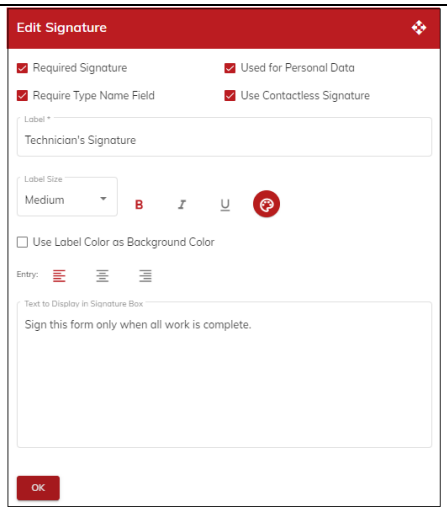
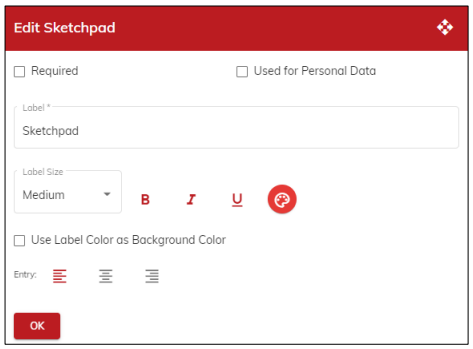
Long Text	Provides a field for the tech to enter a long text entry that can contain paragraph breaks. Click Edit to open the Edit Long Text window and to enter a label for the text. There is no limit to the number of characters the tech can enter when completing the form, and unlike the text input, the text will wrap and display the full entry. **Enable Barcode Reader** allows the app user to open a barcode reader to fill in the field during form entry. Use the Benchmark tab to open the benchmark settings for a long text field. Information about setting Benchmarks can be found here. Toggle on **Use Default Value** and enter text if you want to auto-populate the form with data on the app. Defaults can be changed during form entry.
Lookup	Provides a field for the tech to select an answer from a pre-defined list of options. This option works similarly to a Select input, but the selections appear in a window with an entry field for the tech to search the list for the appropriate entry. This is useful when the list of selections is longer than you'd want to have in a selection list. Click Edit to open the Edit Lookup window and enter a label, then enter each option on a separate line in the Options box. Options can be pasted in from a spreadsheet or other type of document. Toggle on **Use Data Set** to use a data set field for the lookup, then select the data set and data set field to use. From the Connect Data Set and Form Data field, set the connection between the form and the data set. **Enable Barcode Reader** allows the app user to open a barcode reader to fill in the field during form entry. **Enable Multiple Selection** allows the app user to select more than one option in the lookup. In the mobile app when the user us selecting multiple options, it will look like this:

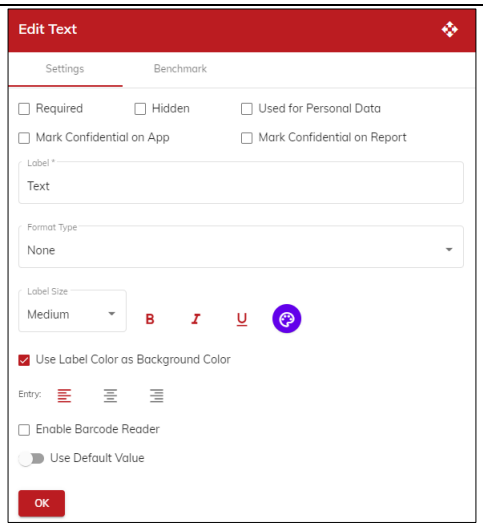
	 After the selections are complete, the options will appear in a comma separated list like this:  Toggle on **Use Default Value**, then select the option from the list you want to appear marked when using the app. If Enable Multiple Selection is marked, you'll be able to select more than one default value. Defaults can be changed during form entry.
Number	Provides a field for the app user to enter a numeric entry. Click Edit to open the Edit Number window and to enter a label. **Decimal Places** Enter the number of decimal places allowed for this number. On the mobile app, the decimals are always show to this number even if they are zero. **Unit of Measure** Enter a unit of measure that is displayed next to the number in the mobile app. Select whether you want the U of M text or symbol you type here to appear before or after the number. Units of Measure are limited to 8 characters. **Formatting Rules*** You can add rules to color format the data entered in the app to Number fields (including calculations and numbers in tables). For example, if a temperature reading exceeded 80 degrees or was under 30 degrees, you can select an operator to color the field red for over 80 and blue for under 30 when the user enters the reading on the app.

	To add formatting rules, click Edit on the numeric field you've added to the form, and click Add under Formatting rules. Select an Operator and the value. Using the example above, the operator would be "greater than or equal to" and value would be "80". Click the palette to select a color. Then, select the tone of the color you want to use. The color boxes show the color of field, and the color the text will be if you use that color. After you select the color, the palette button will change to the background and text color you selected for easy reference.  You will also see color indicators in the number fields in the Forms design area for reference:  Use the Preview to test your color selections. Use the Benchmark tab* to open the benchmark settings for a number field. Information about setting Benchmarks can be found here. Toggle on **Use Default Value** and enter a default number if you want to auto-populate the form with data on the app. Defaults can be changed during form entry.
Radio	Provides radio buttons for the tech to select. Radio buttons are used when you have multiple choices, but only one can be selected. Click Edit to open the Edit Radio window and to enter a label, then enter each option on a separate line in the Options box. Options can be pasted in from a spreadsheet or other type of document. The benefit of using radio buttons over a selection list is that all options are always visible. A good rule of thumb is if there are 7 or fewer options, use radio buttons. **Note**: If you justify a radio button to the right, the radio will appear to the right of the text:

	 Radio buttons can't be center justified. Toggle on **Use Data Set** to use a data set field for the radio button, then select the data set and data set field to use. Select if you want the radio button list to appear horizontally or vertically. Toggle on **Use Default Value**, then select the option from the list you want to appear selected when using the app. Defaults can be changed during form entry.
Select	Provides a selection list for the app user to select an answer of a visible list of many. Click Edit to open the Edit Select window and to enter a label, then enter each option on a separate line in the Options box. You can enter as many options as you'd like. Options can be pasted in from a spreadsheet or other type of document. The benefit of using a selection list is that you can use very little space to offer many choices. A good rule of thumb is if there are more than 7 options, use a selection list. Note: The options in your select list should be kept as short as possible, different devices show a different number of limited characters. Be sure to test your form on a mobile device to ensure enough of the option text is showing (the Preview does not accurately display the character count of a mobile device). If longer options are required, use radio buttons or a lookup instead. Toggle on **Use Data Set** to use a data set field for the select field, then select the data set and data set field to use. From the Connect Data Set and Form Data field, set the connection between the form and the data set. **Enable Multiple Selection** allows the app user to select more than one option in the list. In the mobile app when the user is selecting multiple options, it will look like this:

	 After the selections are complete, the options appear in a comma separated list like this:  Without the multiple selection option marked, the list will appear without the checkboxes in front of each option. Toggle on **Use Default Value**, then select the option from the list you want to appear marked when using the app. If Enable Multiple Selection is marked, you'll be able to select more than one default value. Defaults can be changed during form entry.
Signature	Provides a space on the form for a signature. Click **Edit** to open the Edit Signature window and to enter a label.

	 Mark **Required Signature** to make the Signature field a required field. Mark **Require Type Name Field** if you require a typed name signature. **Note**: If you have the Require Type Name Field option marked but not the Required Signature option marked, there is no asterisk next to the signature label on the form indicating the Type Name field is required. Once you click the Sign button in the app, you will see the Type Name field has the asterisk. The **Use Contactless Signature** option defaults marked. This allows you to provide a QR code or a link to the customer for contactless signing. Enter any text you want to provide to the signer in the **Text to Display in Signature Box** field.
Sketchpad	Provides a space on the form for a drawing, which is helpful when adding a photo to a form won't work. You can draw basic shapes as well as straight lines or arrows, add text, and draw freehand. Click **Edit** to open the Edit Sketchpad window.  Mark **Required** to make the sketchpad field a required field. If deleting specific fields off a form, mark the **Used for Personal Data** option to keep non-personal data for analysis, while deleting the personal data.
Text	Provides a field for the tech to enter a text entry. Click Edit to enter a label for the text. There is no limit to the number of characters the tech can enter when completing the form.

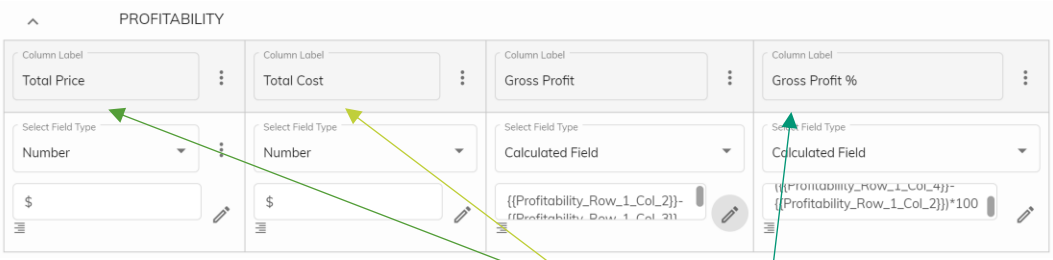
	 Mark **Required** to make the text field a required field. Mark **Hidden** if you don't want the text field to appear in the app. If deleting specific fields off a form, mark the **Used for Personal Data** option to keep non-personal data for analysis, while deleting the personal data. You can also mark the field as confidential in the app and on reports. Select a format type. For example, a text field can be formatted as a phone number, and in the app, the phone keyboard appears instead of an alphabetic keyboard. **Enable Barcode Reader** allows the app user to open a barcode reader to fill in the field during form entry. Use the Benchmark tab to open the Benchmark settings for a text field. Information about setting Benchmarks can be found here. Toggle on **Use Default Value** and enter text if you want to auto-populate the form with data on the app. Defaults can be changed during form entry.
Time	Inserts a time selector on the form for the app user to select a time of day. Click Edit to enter a label. Toggle on **Default Current Time on Form** to automatically insert the current time when the form is opened using the app. Defaults can be changed during form entry.
Actions/ Container	These fields provide entry for the app user on the form, but also require some design input.
Calculated Field	Used to calculate numeric entries on the form. Any numeric field on the form can be used in a calculation including a time span field or other calculated field. Click Edit to enter a label. **Decimal Places** Enter the number of decimal places the calculated amount will contain. The number of decimal places on the calculated answer does not need to match the number of decimal places on the numeric fields used to calculate the answer. On the mobile app, the decimals are always show to this number even if they are zero.

Unit of Measure Enter a unit of measure that is displayed next to the number in the mobile app. Select whether you want the U of M text or symbol you type here to appear before or after the number. Units of Measure are limited to 8 characters.

Equation Enter the equation you want calculated on the form by selecting the field you want to use and adding any operators to structure your calculation. For example, this equation uses the Gross Profit field to enter the calculation more easily, since Gross Profit is already a calculated field.

If the equation is in error, there will be an error such as #ERROR! or #NAME? under the calculation. You can check your calculations in the Preview window by entering numbers in the associated fields to be sure they're correct.

In a table, the table name is used with the row and column counts to arrive at the cell for the Available Fields list. For example, in this table:



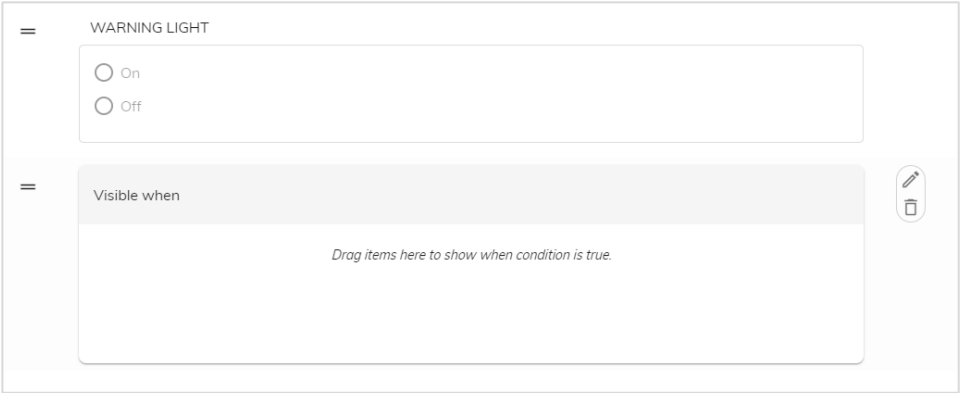
The Gross Profit calculation looks like this:

Since calculated fields are number fields, color formatting can be added. See instructions for Formatting Rules in the Number input above.

Conditional Field	Conditional fields provide the ability to show additional fields in the app based on the answer to another input on the form. Drag a conditional field onto the form. You will see a box with a "Visible when" header. Click Edit, and in the Edit box, you will build your conditions. As you build your

conditions, a statement describing the conditions will form in the Edit box. This will help you if you are inexperienced in building And/Or queries.

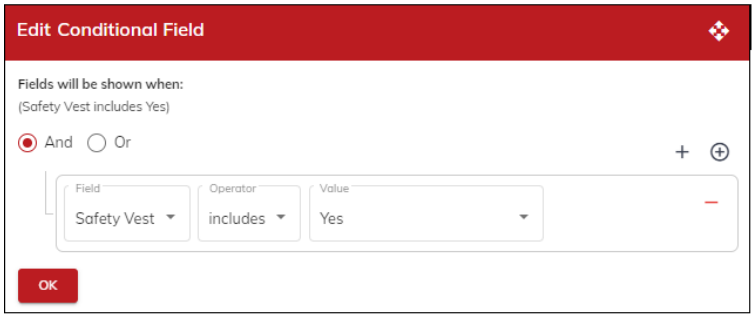
For example, in this form, there is a field asking if a Warning Light is present. If the warning light is On, an additional description field will be added. The additional description is added as a conditional field.



Click Edit by the Conditional field, and the Edit Conditional Field window appears.

Click the Add button to add a rule to the field.

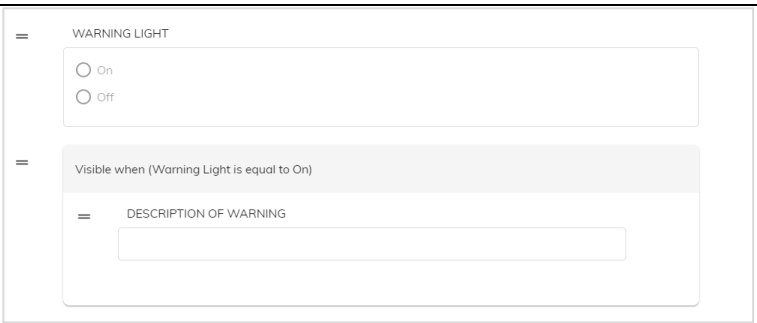
Select the field to build the condition on. Any numeric (including calculated fields), text, checkbox, list, or radio field on the form can be used to build a condition. As each option is selected, the statement is formed. In this example, the selections Warning Light, is equal to, and On were selected.



You can build more complex conditions using multiple rules and rulesets with additional And/Or clauses.

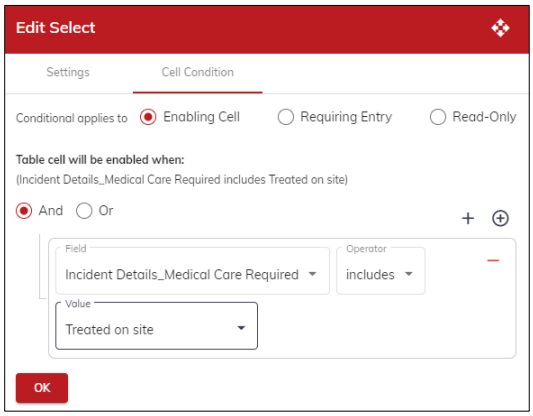
When you've completed your condition, click OK.

Drag the fields you want to appear when the condition you created is met into the Visible when box. The statement in your condition will appear as well describing when the additional fields are going to appear.



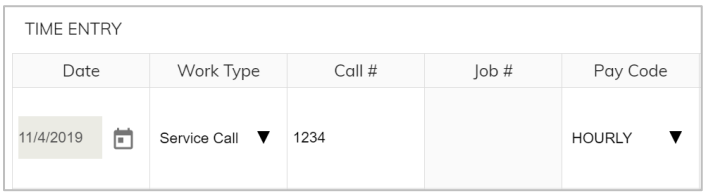
In a table, conditional fields can be used to enable or disable a column or cell require an entry or show the text as read only.

All Edit windows in a table have a Cell Condition tab for setting a condition:

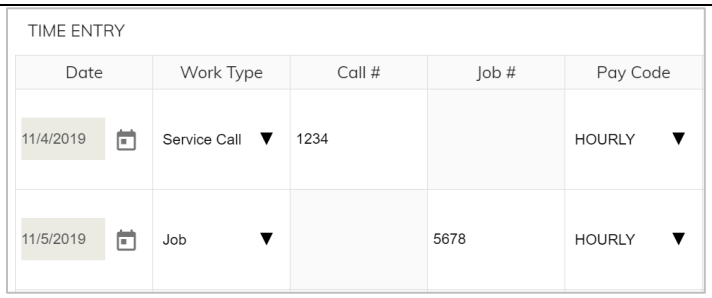


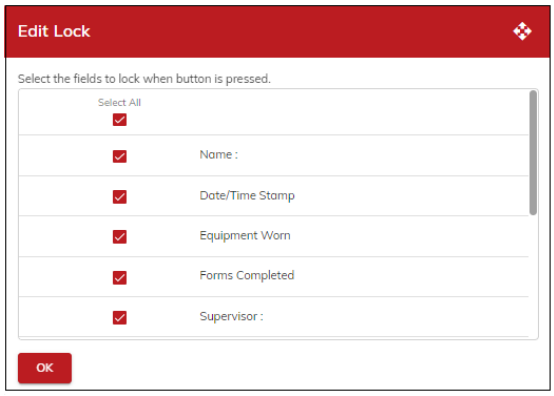
The field name is arrived at with a combination of the Table Name then the row and column number. In the screenshot above, the table is Time Entry 1, and the Work Type field is Row 1 Column 2. Because this is a dynamic table, there's only one row in the field list; a static table would have all that were set up. This condition is on the Call # field (shown in the next screen shot) to be enabled when the Work Type is Service Call. The Job # field (shown in the second screen shot) is enabled when the Work Type is Job. So, the user only has available the correct column based on the Work Type selected.

In the app, you can see how this would look:



Call # is enabled and the entry is made, but Job # and Pay Code are not editable, because the condition on those cells is set to be enabled if the Work Type is Job. You can see in the next screen shot how multiple rows would appear based on differing conditions:

	 TIME ENTRY Date | Work Type | Call # | Job # | Pay Code 11/4/2019 | Service Call | 1234 | | HOURLY 11/5/2019 | Job | | 5678 | HOURLY If there is an incomplete rule on a conditional field, when you click Save, you'll receive message at the bottom of the screen notifying you that there was an error. The conditional field header turns red, and a warning appears above the conditional field in the Admin Designer. You can save your form with the error and fix it at a later time. Note that if your form is published, the conditional field will not hide and show appropriately if there is an error, and your report will have errors as well until the issue is resolved. Once your condition is properly set up again, the error will disappear, and the header will appear normally.
Dynamic Table	A dynamic table is one that the tech can add rows to as they enter information on the form using the device. Defining a dynamic table requires only defining the columns of information. Click Edit open the Edit Dynamic Table window to enter a label for the table. Although it may seem unnecessary, the table label and column labels are important for retaining the field reference when creating reports. Mark **Hide Field Label** if you don't want the field label to display in the app. Mark **Hide Table** if you don't want the table to appear in the app. If you mark this option, the field label will also be hidden in the app, regardless of if you have the Hide Field Label option marked. From the **Highlight Row When Answer in This Column** option, select the column heading for which you want to set a row to be highlighted with a background color based on the way a particular column or cell is answered in a table. The highlight color you set up also applies to the report, so you don't need to set up functions for that purpose. **Use Summary Row** To add a totals row to the bottom of your table, mark the Use Summary Row checkbox in the Edit Dynamic Table window. Once you've added number field types to your table the options for the Summary row will appear. You can choose Average, Min, Max, or Sum to summarize the row numeric information. After you add a Dynamic Table, you can add column labels and define the field type for the data in the column. You can add as many columns as you need for the data by clicking the More button and selecting whether you want to copy the column, you're on or insert a blank column. Click the **Modify Column Sizes** button to open the Resize Table Columns window. This window displays a "preview" table where there is a number field at the top of the table header where you can enter a pixel number, or you can drag the column width to the size you want. You can use the More button and move columns right and left as well.

	TIP: Keep the device size in mind while designing your table. Although you can rotate a Dynamic table in the app, if the table has many columns, you might want to reconsider the format of the table. Select the field type from the list, then click Edit to further define the data type for the column.
Link	A link provides a hyperlink to a website or another app that appears as a button on the form. Click Edit and enter a label that will appear on the button. Then, type or paste the URL for the site or app that will open from the link. For opening an app, you'll need to know the URL for the app. Be sure to include the "://" in the link URL. **NOTE**: For a link to a website, if no text appears in front of "www", FormsPro will automatically insert "HTTP://" or "HTTPS://" so that the link will work. Select a color for the button border and label text and click OK. In Preview, you can test links to websites, but links to mobile apps will not work in most circumstances.
Lock	A Lock provides a button in the mobile app which will disable the fields you choose and prevent them from being edited. Once the fields are locked, they cannot be unlocked. In the Edit pop-up window, select the fields on the form that you want to lock when the Lock Fields button is pressed by the mobile user. 
Section	A section is used group several fields that are saved together to add to any form. Sections can contain any input type, except page breaks, and can contain or be in conditional fields. In the Edit Section window, you can specify to hide a section, the section border and the section label text in the app.
Static Table	A static table is one that will retain exactly the number of rows or columns you set while designing the form. No additional rows can be added when the tech is entering data on the device. You will define both the columns and rows of information used in a static table. Click Edit to open the Edit Static Table window. Enter a label for the table. Although it may seem unnecessary, the table label and column and row labels are important for

	retaining the cell reference when creating reports. You can remove the headers from the report. Mark **Hide Field Label** if you don't want the field label to display in the app. Mark **Hide Table** if you don't want the table to appear in the app. If you mark this option, the field label will also be hidden in the app, regardless of if you have the Hide Field Label option marked. Click the **Modify Column Sizes** button to open the Resize Table Columns window. This window displays a "preview" table where there is a number field at the top of the table header where you can enter a pixel number, or you can drag the column width to the size you want. **Hide Label Column** Select this option in the Edit Static Table window if you don't want to display a row label in the first column of information. (Be sure to add labels, even if they are hidden.) After you add a static table, enter the column and row labels you want to use. You can add additional rows and columns by clicking More and selecting whether you want to copy the column or row you're on or insert a blank column or row. Then, select the input type for each cell that will require entry by the tech. The cells that will require entry are colored white, while the header cells are shaded.
Time Span Field	Use a Time Span field to calculate the hours between two-time fields on the form. Once calculated, a time span field will work like any other number field and can be used in other calculated fields. Time spans will always display 2 decimal places. Once you drag on a Time Span field, open the Edit Time Span Field window and enter a label. Then, you can select a starting time and ending time from the time fields that have been added to the form. Then, select how you want the resulting calculation to be rounded, if at all.

Rounding	Round to Nearest	Example: Start time 1:10 End time : 3:50 Exact span= 2.67 hours
None	Not available	2.67 Hours
Always up	Quarter Hour	2.75 Hours
Always Up	Half Hour	3.00 Hours
Always Up	Hour	3.00 Hours
Always Down	Quarter Hour	2.50 Hours
Always Down	Half Hour	2.50 Hours
Always Down	Hour	2.00 Hours

	Standard*	Quarter Hour	2.75 Hours
	Standard	Half Hour	2.50 Hours
	Standard	Hour	3.00 Hours

*Standard rounding uses the halfway point for the Round to Nearest selection to determine rounding up or down. Exactly half will round up.

NOTE: Timesheets for hourly employees in the U.S. have regulations for how time is rounded. If you are using a time span field for calculating hourly time, please be aware of the regulations when selecting your rounding options.

You can also add formatting rules to the calculated time span. See information in the Number input for details.

Dynamic Fields	Any dynamic field that has been defined can be added to a form. If the dynamic field contains more than one entry, all are brought onto the form as a group and cannot be changed.

CREATING A BASIC FORM

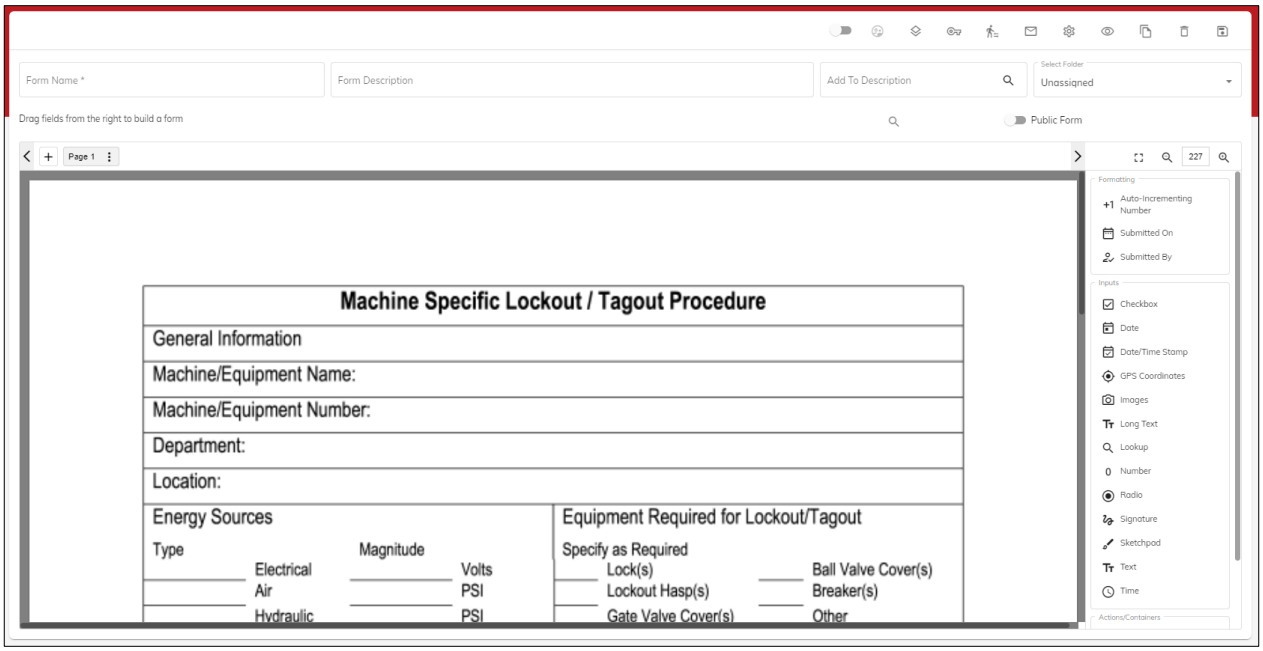
A basic form uses an image or PDF document as a background for your form and report. Basic forms provide an efficient way to upload existing forms into FormsPro and simply transforms a paper form to a digital format.

Reports from a basic form are only based off the form designer, so your form is your report. You can only add a submitted by and submitted date to the report.

1. From the **Form and Report Designer** menu, select **New Form**. The Select a Form Design Method page opens.
2. Click on the Basic form icon, then click **Create**. The Upload File window opens.

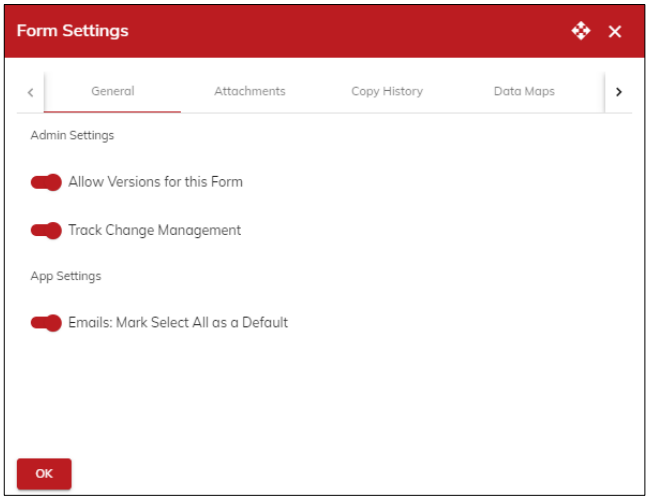
3. Click **Choose File** to select the form you want to upload. The following file types can be uploaded: PDF, JPG, JPEG, PNG, and BMP.

4. Click **Upload** to upload the form. The form appears in the Forms Designer.



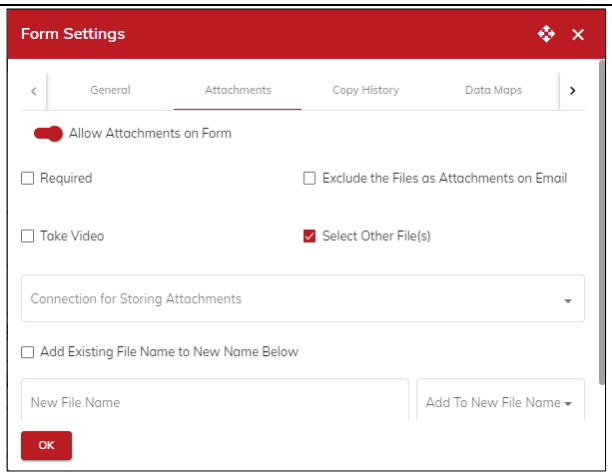
5. Name your form and assign it to a folder, if applicable.

6. Click (Default Settings) on the toolbar to open the Form Settings window. This window is used manage versions and form changes, allow attachments, copy history, and set data maps.



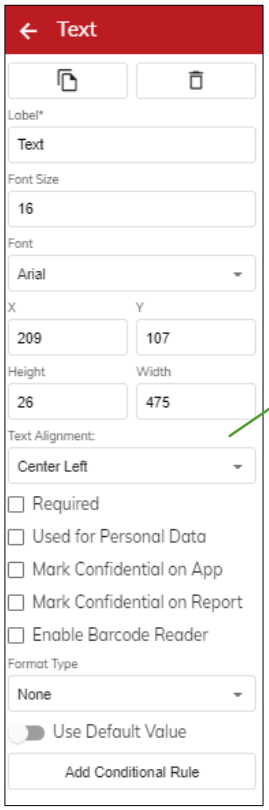
Form Settings Window Tabs for Basic Forms

General	Toggle **Allow Versions for this Form** on to have different versions of the form. Toggle **Track Change Management** on to view each change that is made to the form after the first save of the form. Toggle **Emails: Mark Select All as a Default** on to automatically mark the Select All checkbox in the Emails section of a form.
Attachments	Toggle **Allow Attachments on Form** to allow for attachments to be added on the basic form and to set the attachment options.

	 Mark the **Exclude the Files as Attachments on Email** option if you do not want to include the attachment file on an email. This is useful when you don't want to send file to an end customer, or you know the attachments are too large for email, such as long videos. If you leave this option unmarked, the file attachments will be sent as attachments on the email, which is useful for customer-facing attachments, or when an email is sent internally to someone who may not have access to the storage location. When files exceed the limit set on email servers, no files are sent. Select the attachment connection to use for storing the attachments. Mark the **Add Existing File Name to New Name Below** option to use an attachment's existing file name as part of the new name. In the **New File Name** field, name the attachments to identify the file in the connection folder. If the file name contains characters that are not acceptable by the storage solution, the unacceptable characters are replaced with an underscore. You can enter the form name if you want it to be part of the file name. If this field is left blank, the file name that exists is used. The extension of the file is maintained, regardless of the file name. **Note**: If no attachment data connection is set up, fields and options related to anything other than a photo are disabled.
Copy History	Choose settings for copying data from a previous submission into a new form using the mobile app. See the Copying from History steps for setting up this functionality.
Data Maps	Choose settings to select fields on a form for which you want to use submitted data. See the Access to Form Data via Data Maps procedure for more information.
Deep Link	Choose settings to create deep links for form integrations. See the Building Deep Links procedure for detailed information.

7. Click **OK** to close the Form Settings window. You should also click **Save** to save these settings on your form.
8. Drag the inputs you want onto the form from the menu on the right. Each input has different property options available for additional formatting of the information you want entered on the form. The label field

for each input is a required field, so that context is provided for data mapping and conditional fields. See the Form Designer Inputs for Basic Forms table for descriptions of each input type.

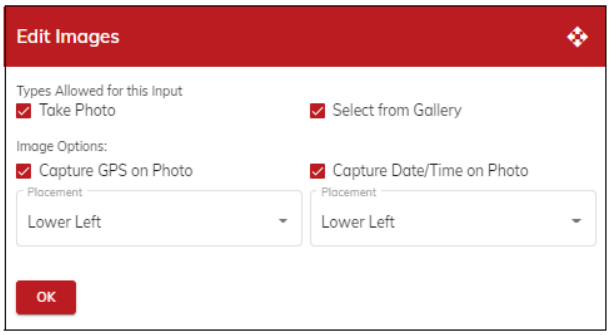


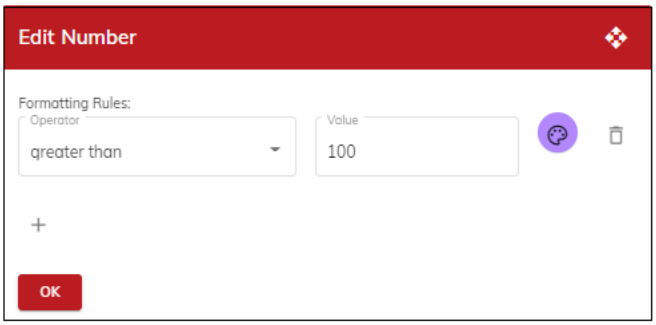
This illustration shows the properties available for a text field.

Form Designer Inputs for Basic Forms

Formatting	Formatting options are used to provide structure to your form. They do not require a response on the form from the app user.
Auto-Incrementing Number	Inserts a user-defined number that increments when a form is submitted. Select the auto-incrementing number you want to add to the form from the Auto-Incrementing Number properties pane. When using this input, you cannot save a form that doesn't have an auto-incremented number selected.
Submitted On	Inserts the date and time the form was submitted. There will be no label on the form or report for this information. If it's required but isn't on your background document, you can add it and re-upload the form.
Submitted By	Inserts the name of the user who submitted the form. There will be no label on the form or report for this information.
Input	These fields require input from the mobile app user. Any of the inputs can also be added to a cell in a table.
Checkbox	Provides checkboxes for the app user to select. Checkboxes are used when more than one option can be selected, and you want all options to be represented.

	After adding a checkbox to a basic form, use the property pane to name the checkbox in the **Label** field. Then add each checkbox option by dragging the **Add New Value** property onto the basic form. Name each checkbox added in the **Option Value** field. In the Checkbox properties pane, specify the following: **Required** Mark if the checkbox is a required field. **Used for Personal Data** Mark if the checkbox is used for personal data. By checking this option, non-personal data is kept for analysis, while deleting the personal data. **Use Default Data** Toggle on, then select the options from the Default Options list you want to appear marked when using the app. Defaults can be changed during form entry.
Date	Inserts a date selector onto the form. In the Date properties pane, specify the following: **Required** Mark if the date is a required field. **Used for Personal Data** Mark if the date is used for personal data. By checking this option, non-personal data is kept for analysis, while deleting the personal data. **Default Current Date** Mark to automatically insert the current date when the form is opened using the app. Defaults can be changed during form entry.
Date/Time Stamp	Inserts a single field for the date and time for entering the current date and time in a single click. In the Date/Time Stamp properties pane, specify the following: **Required** Mark if the date/stamp field is a required. **Used for Personal Data** Mark if the date/stamp field is used for personal data. By checking this option, non-personal data is kept for analysis, while deleting the personal data.
GPS Coordinates	Inserts a button on the form that when clicked, finds the latitude and longitude for the app user. In the GPS Coordinates properties pane, specify the following: **Required** Mark if the GPS coordinates field is a required. **Used for Personal Data** Mark if the GPS coordinates field is used for personal data. By checking this option, non-personal data is kept for analysis, while deleting the personal data.
Images	Provides a field for the tech to insert images on the form. In the Images properties pane, specify the following: **Required** Mark if the image field is a required. **Used for Personal Data** Mark if the image field is used for personal data. By checking this option, non-personal data is kept for analysis, while deleting the personal data.

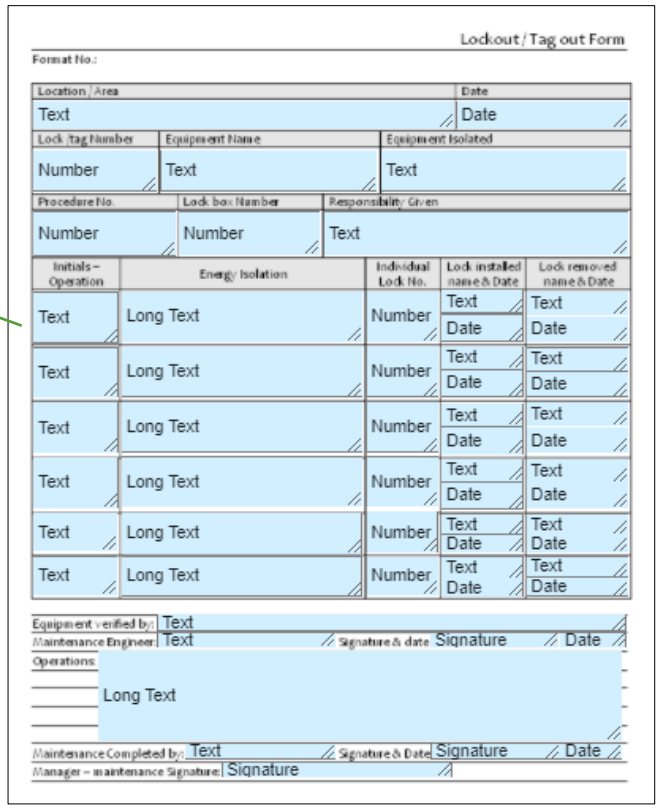
	Click **Image Settings** to open the Edit Images window. Specify the type of image allowed for this input. Inputs include **Take Photo** and **Select from Gallery**. **Note**: If you are using an iOS device and have only the **Select from Gallery** option marked, you will still be able to take a photo with your device. Mark the **Capture GPS on Photo** option to include the GPS coordinates of the person taking the photo. Mark the **Capture Date/Time on Photo** to include the date and time the photo was taken. Specify where you want the GPS and date/time information placed on the image. If the same placement is selected for both options, the GPS information will be above the date/time. 
Long Text	Provides a field for the tech to enter a long text entry that can contain paragraph breaks. There is no limit to the number of characters the tech can enter when completing the form, and unlike the text input, the text will wrap and display the full entry. In the Long Text properties pane, specify the following: **Required** Mark if the long text field is a required. **Used for Personal Data** Mark if the Long Text field is used for personal data. By checking this option, non-personal data is kept for analysis, while deleting the personal data. **Enable Barcode Reader** Mark to allow the app user to open a barcode reader to fill in the field during form entry. **Use Default Value** Toggle on and enter text if you want to auto-populate the form with data on the app. Defaults can be changed during form entry.
Lookup	Provides a field for the tech to select an answer from a pre-defined list of options. The selections appear in a window with an entry field for the tech to search the list for the appropriate entry. In the Lookup properties pane, specify the following: **Use Data Set** Toggle on to use a data set. Click the **Edit Data Set** button to open the Edit Lookup window, where you can select the data set to use. **Required** Mark if the lookup field is a required. **Used for Personal Data** Mark if the lookup field is used for personal data. By checking this option, non-personal data is kept for analysis, while deleting the personal data. **Enable Barcode Reader** Mark to allow the app user to open a barcode reader to fill in the field during form entry.

	Enable Multiple Selection Mark to allow the app user to select more than one option in the lookup. **Use Default Value** Toggle on, then select the option from the Select Default Option(s) list you want to appear marked when using the app. If Enable Multiple Selection is marked, you'll be able to select more than one default value. Defaults can be changed during form entry.
Number	Provides a field for the app user to enter a numeric entry. In the Number properties pane, specify the following: **Required** Mark if the Number field is a required. **Used for Personal Data** Mark if the number field is used for personal data. By checking this option, non-personal data is kept for analysis, while deleting the personal data. **Decimal Places** Enter the number of decimal places allowed for this number. **Unit of Measure** Enter a unit of measure that is displayed next to or after the number in the mobile app. **Use Default Value** Toggle on, then enter the default number to auto-populate the form on the app. Defaults can be changed during form entry. Click **Edit Format Rules** to open the Edit Number window. You can add rules to color format the data entered in the app to Number fields (including calculations and numbers in tables). To add formatting rules, select an operator and the value. 
Radio	Provides radio buttons for the tech to select. Radio buttons are used when you have multiple choices, but only one can be selected. After adding a radio to a basic form, use the property pane to name the radio in the **Label** field. Then add each radio option by dragging the **Add New Value** property onto the basic form. Name each radio added in the **Option Value** field. In the Radio properties pane, specify the following: **Required** Mark if the radio is a required. **Used for Personal Data** Mark if the radio field is used for personal data. By checking this option, non-personal data is kept for analysis, while deleting the personal data. **Use Default Value** Toggle on, then enter the default value in the Edit Question Default Value list.

Signature	Provides a space on the form for a signature. In the Signature properties pane, specify the following: **Required** Mark if the signature is a required. **Used for Personal Data** Mark if the signature field is used for personal data. By checking this option, non-personal data is kept for analysis, while deleting the personal data. **Require Type Name Field** Mark if you require a typed name signature. **Use Contactless Signature** Mark to provide a QR code or a link for contactless signing. Enter any text you want to provide to the signer in the **Text to Display in Signature Box** field.
Sketchpad	Provides a space on the form for a drawing, which is helpful when adding a photo to a form won't work. You can draw basic shapes as well as straight lines or arrows, add text, and draw freehand. In the Sketchpad property pane, specify the following: **Required** Mark to make the drawing space required. **Used for Personal Data** Mark if the drawing space is used for personal data. By checking this option, non-personal data is kept for analysis, while deleting the personal data. Click **Add Conditional Rule** to open the Edit Conditional Field window, where you can set up a conditional field. Conditional fields provide the ability to show additional fields in the app based on the answer to another input on the form.
Text	Provides a field for the tech to enter a text entry. In the Text properties pane, specify the following: **Required** Mark to make the text field a required field. **Used for Personal Data** Mark if the text field is used for personal data. By checking this option, non-personal data is kept for analysis, while deleting the personal data. **Mark Confidential on App** Mark if the field contains confidential information. By checking this option, it will not display on the app. **Mark Confidential on Report** Mark if the field contains confidential information. By checking this option, it will not display on the report. **Enable Barcode Reader** Mark to allow the app user to open a barcode reader to fill in the field during form entry. **Format Type** Specifies the field's format type. For example, a text field could be formatted as a phone number, and in the app, the phone keyboard appears instead of an alphabetic keyboard. **Use Default Value** Toggle on, then enter the default value in the Default Value field.
Time	Inserts a time selector on the form for the app user to select a time of day. In the Time properties pane, specify the following:

	Required Mark if the time is a required field. **Default Current Time** Mark to automatically insert the current time when the form is opened using the app.
Actions/ Container	These fields provide entry for the app user on the form, but also require some design input.
Calculated Field	Used to calculate numeric entries on the form. Any numeric field on the form can be used in a calculation including a time span field or other calculated field. Click **Calculated Field Settings** to open the Edit Calculated Field window. Enter the equation you want calculated on the form by selecting the field you want to use and adding any operators to structure your calculation. Click **Add Conditional Rule** to open the Edit Conditional Field window, where you can set up a conditional field. Conditional fields provide the ability to show additional fields in the app based on the answer to another input on the form.
Link	A link provides a hyperlink to a website or another app that appears as a button on the form. Click **Link Settings** to open the Edit Link window. Type or paste the URL for the site or app that will open from the link. For opening an app, you'll need to know the URL for the app. Be sure to include the "://" in the link URL. **NOTE**: For a link to a website, if no text appears in front of "www", FormsPro will automatically insert "HTTP://" or "HTTPS://" so that the link will work. Select a color for the button border and label text and click OK.
Time Span Field	Use a Time Span field to calculate the hours between two-time fields on the form. Once calculated, a time span field will work like any other number field and can be used in other calculated fields. Time spans will always display 2 decimal places. Click **Edit Format Rules** to open the Edit Time Span Field window, where you can add formatting rules to the calculated time span. See information in the Number input for details.

This is an example of a basic form where inputs have been dragged on it.

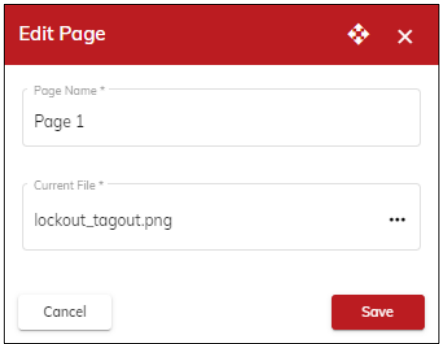


9. When you've completed designing your form, click (Save).

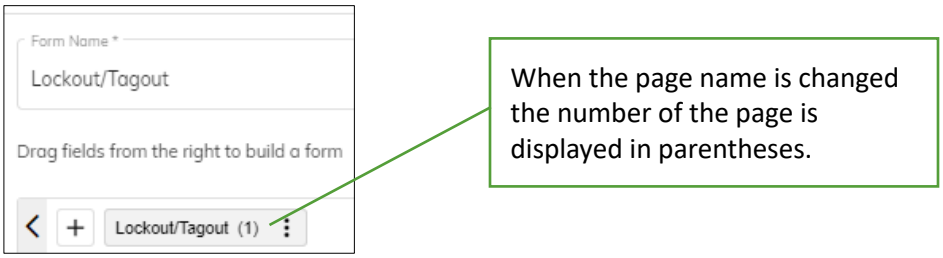
Editing a page

Use the Edit Page window to make changes to your basic form, such as renaming the page or replacing the background.

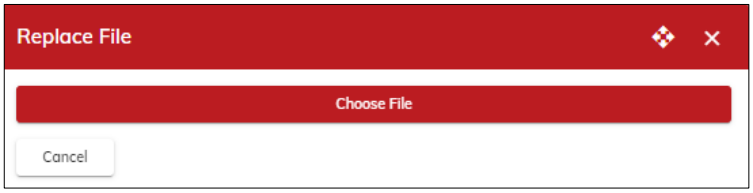
1. Click next to the page number and select **Edit** to open the Edit Page window.



2. In the **Page Name** field, change the page name. When you make a change to the page name, the number of the page will show in parentheses to display the page number



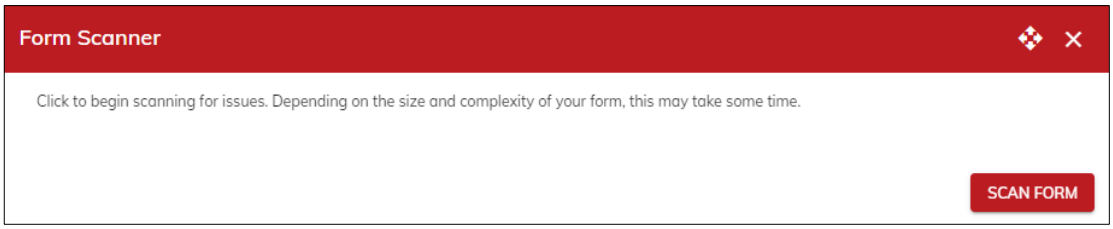
3. From the **Current File** field, click the three dots to open the Replace File window.



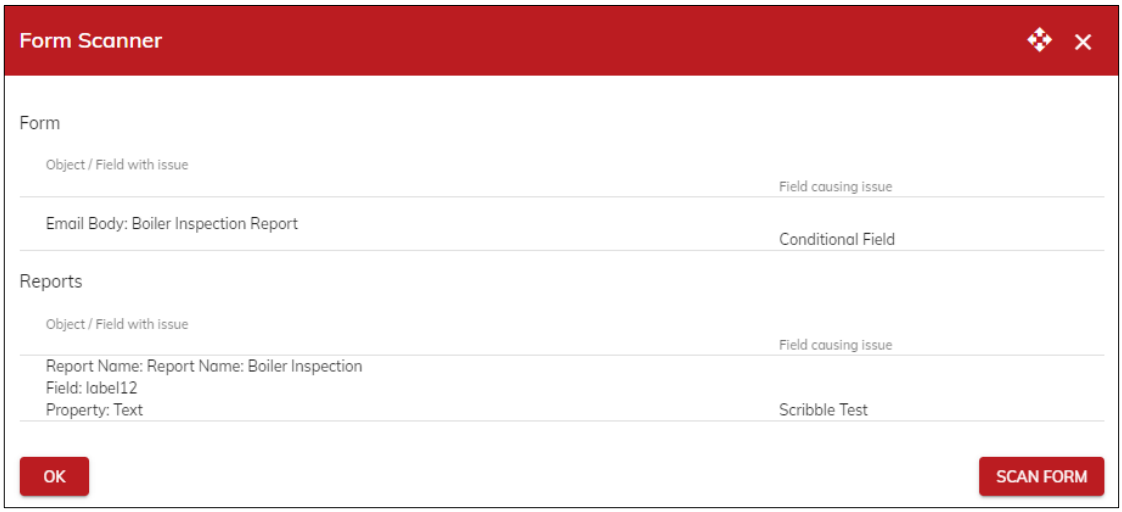
4. Click **Choose File** to select the new file with which you want to replace. If there are multiple pages, you can select which page to replace.
5. When you've completed editing the page, click **Save**.

SCANNING A FORM

Click (Scan for errors) to open the Form Scanner window. Scan your form for any errors or issues within the inputs that could cause problems, such as label changes that affect conditional fields, reports, or data maps.



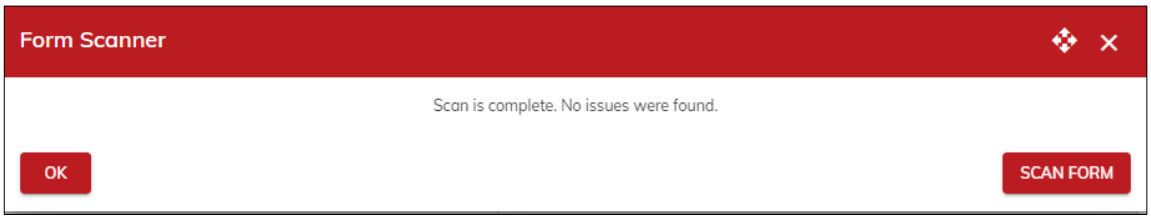
Click **Scan Form** to scan your form for errors or issues.



The Form Scanner window lists the errors and issues found on the form and reports that help you resolve the issues before app users do. Click **OK** to close the Form Scanner window to correct any errors on a form or

report. The issues listed on your scan will remain on the Form Scanner window until you rescan or leave the form so that you can return to the list to check the field or object without waiting.

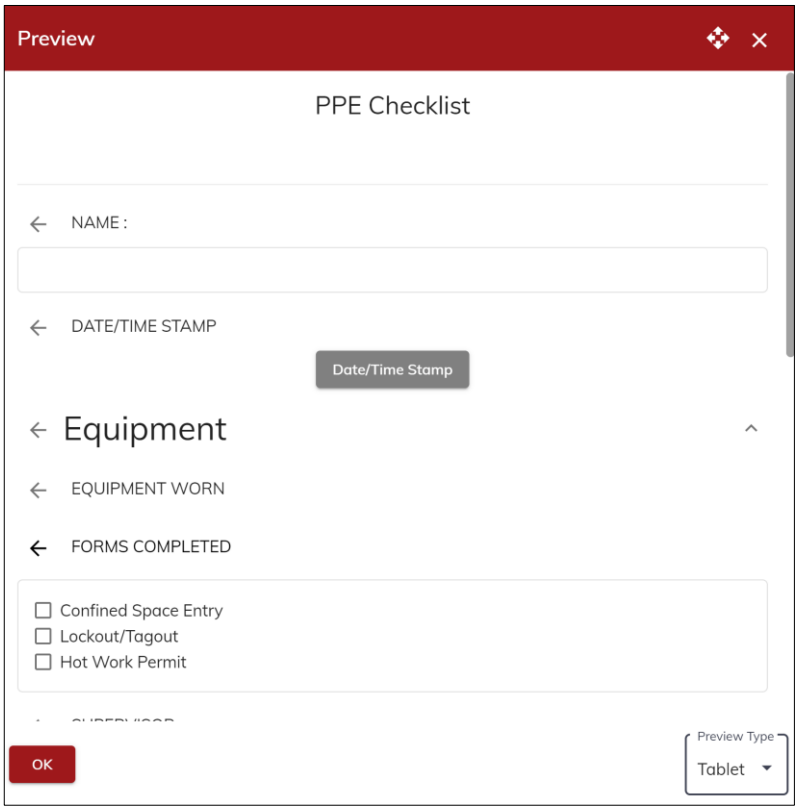
You will also be notified if no issues are found once the scan is complete.

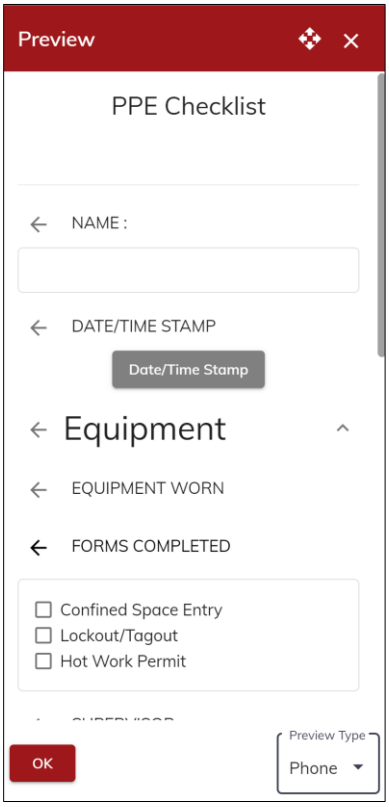


PREVIEWING A FORM

Click (Preview) on the toolbar to open a Preview window with a display very similar to how the form will appear on a device.

You can change the preview type to show how the form will look on a tablet or a phone. You can also type or select entries to check calculated fields or to be sure you have the appropriate input type for each entry.





Click **OK** to close the Preview.

VERSIONING A FORM

Versioning on a form helps keep you more organized when creating new versions of a form, instead of copying a form. For example, you've been considering adding additional fields to your Job Safety form after your technicians have been using it for a year. You can create a new version from the Job Safety form and make all the changes needed while your technicians continue working with the currently published form. This allows

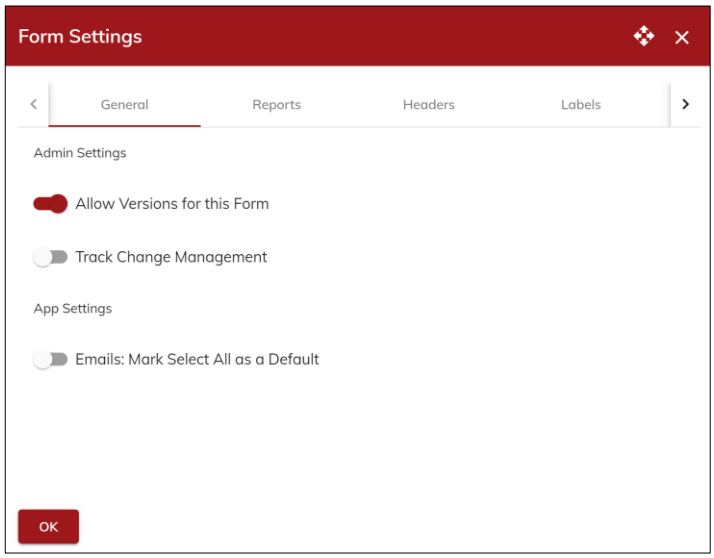
you to keep a form published while you edit the next version of the form. You can have an unlimited number of versions but only one version is published; and versions can be deleted by single form or multiple forms.

We recommend that you do not create a new version with every save. Versioning lets you add multiple things to one version. It's not a single version between saves.

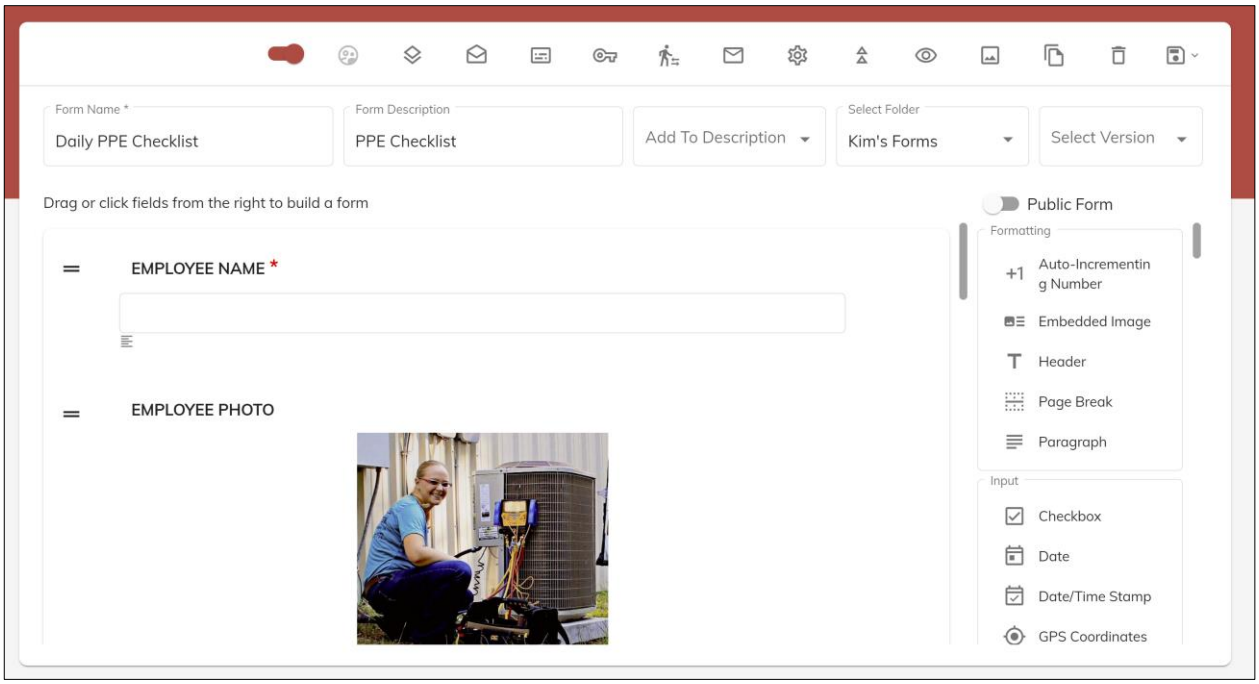
When changing a published version, check all areas of the form to ensure the report, data maps, child forms, etc. are all correct.

When you are exporting a form that has versioning turned on, you will be exporting the latest version of the form. When you are importing the form versioning will be turned off until the user goes into the form and turns on versioning for that specific form.

1. Create or open a form that you want to version.
2. Click (Default Settings) on the toolbar to open the Form Settings window.



3. Toggle on the **Allow Versions for this Form** option, then click **OK**.

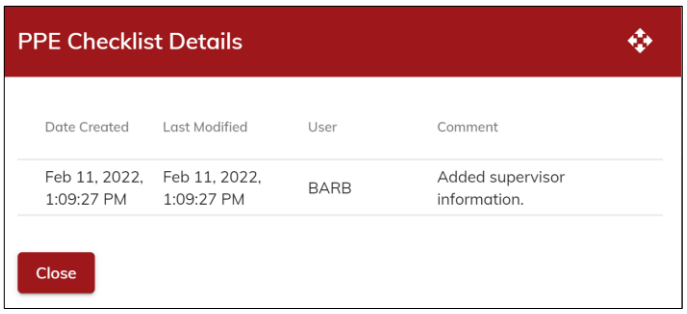


4. Create and save the version by selecting **Save as New Version** from the Save icon on the toolbar. Include version 1 in the name so that establishes the current iteration of the form. Then add/edit fields and save as the current version or save as a new version. All information from the first version is brought with to the second version.

   If you didn't create an advanced report for version 1, when you create one for version 2, version 1 does not get the advanced report. It remains the version with which it was created. When using advanced reports, be sure to save your version and update the report with the fields.

5. Once you have more than one version, you can select the version you want to view/edit From the **Select Version** list on the right-hand side of the form. When you select an older version, you will see only the inputs, selections, options, reports, and emails for that version at the time it was last saved. A filled in bookmark indicates which version is published.

6. Click ⓘ (information icon) to view the details about each form version, such as the date created and modified and what change was made on the form.



7. Save the form:

   Select **Save Current Version** to save the changes to the version you are currently working on.

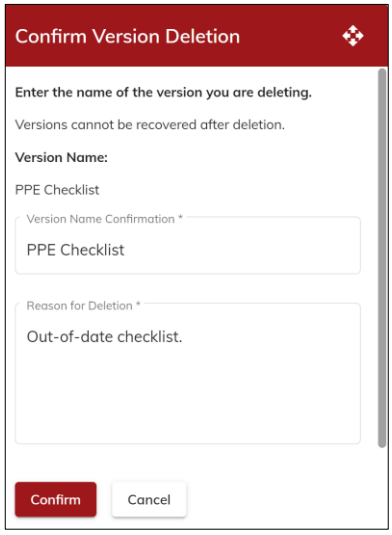
   Select **Save as New Version** to save a new version of the form that is numbered based off what the next version number is. When saving a new version, the form's roles are copied from the previous version. If the

Track Change Management option is toggled on in the Forms Settings window, the changes will appear in the Change Log.

Deleting a version

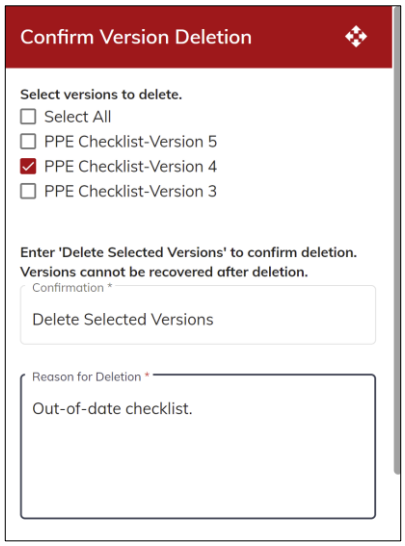
1. Click (Delete) on the toolbar to delete a version.
2. Select to delete either a single version or multiple versions of a form.

   Select **Delete Current Version** to delete the currently displayed version. The Confirm Version Deletion window opens.



   Enter the exact name of the version to confirm the deletion and the reason for the deletion. This information is available for reference in the Delete log.

   Select **Delete Multiple Versions** to open the Confirm Version Deletion window.



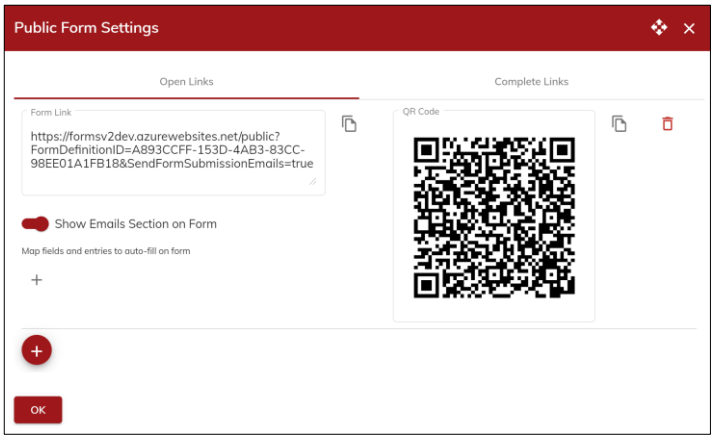
   Mark the version(s) to delete, then enter **Delete Selected Versions** to confirm the deletion and the reason for the deletion.

3. Click **Confirm** to delete the version(s).

CREATING A PUBLIC FORM

1. From the right-hand side of a form page, click the **Public Form** toggle to (On. Then click (Public Form Settings) to open the Public Form Settings window.

2. Click the floating Add button to create the form link of the URL specific to this public form.



3. Click the + (plus) symbol to map fields on the form to the URL which then pre-fills any additional information on the public form.

   If the field you are mapping has a default value on the form, the default will be over-written with the entry you are mapping on the public form. For example, your employees do inspections in North Dakota, and you have several vendor workers performing inspections in Montana. Because your employees are most often going to choose ND as the state, you've set that as a default. However, because users of the public form will be choosing MT more often, enter MT as the state for the public form, to fill in the state for those users.

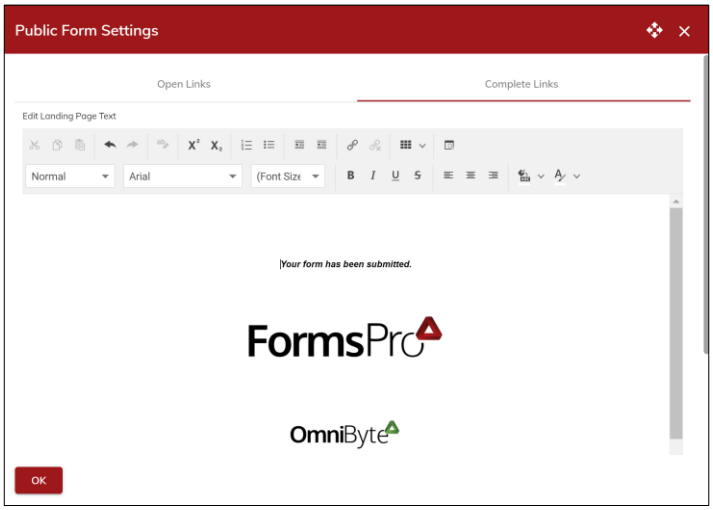
4. A QR code is generated with the data from the URL.

   The form link and QR code are automatically updated with updates to the map field information. If you've already sent the link or QR code, be sure to update your public form users with the new ones.

5. Multiple links and codes can be set up for each form, which is useful if you are prefilling data for a particular location, for example. Let's say you have two cities where you have vendors performing services and are using public forms. You can create one link for City A by selecting City as the Form Field, and A as the Entry, then repeat from step 2 for but this time enter B as the City entry. Users who use the link for City A will see that field populated on their form, and users for City B see the City B on their form.

6. If you wish, click the Copy icon to copy the link and paste it into another location to provide to the public form users to open the form.

7. Click the **Complete Links** tab to determine what public form users will see or go once they submit the form. They can be shown a “landing page” where they’ll see the default message or enter your own message to appear on a “landing page” after a form is submitted.



8. If you wish, use the **Redirect Link** field to paste in a link from another location. Form users will then be taken to that location instead of the landing page when the form is submitted.

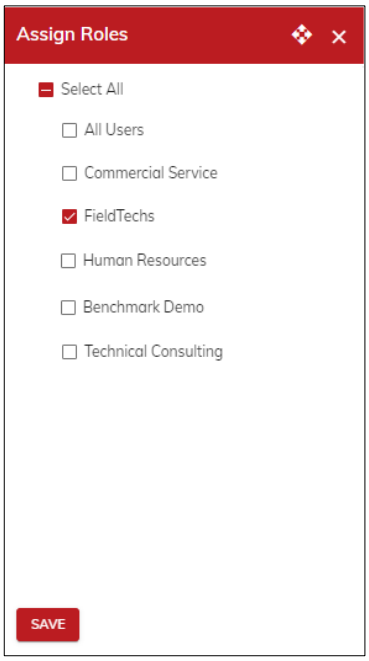
9. Click **OK** to save your entries.

ASSIGNING ROLES TO A FORM

Before any forms will be displayed on a technician’s device, Roles must be assigned to a form. Be sure you’ve set up all the roles needed for a form before you begin.

1. Select the form you’re assigning roles for from the Created Forms.

2. On the toolbar, click (Roles).



3. In the Assign Roles pop-up window, mark the box for the roles this form applies to.

4. Click **Save**.

PUBLISHING A FORM

Once you're ready for a form to be available on the mobile app, click the Publish toggle to (On), which will toggle to the right. The icon next to the form name is filled when the form is published and in use.

Mobile users who are assigned to the same role as the form will see published forms in the Forms list the next time they sync their device.

When publishing a form version, check all areas of the form to ensure the report, data maps, child forms, etc. are all correct.

EDITING A FORM

To edit a form, select it from the Form and Report Designer menu and make any changes you need. Depending on how much time you need to make your changes, or the extent of your changes, you may want to "un-publish" the form before changing by switching the Publish toggle off. This will prevent the form from being used while changes are being made. Forms are editable while published, so a form may be changed while it's in use on a mobile device. The mobile user will be using the "old" version of the form until they sync.

COPYING A FORM

You can use an existing form as a template if you have similar forms with slightly different requirements.

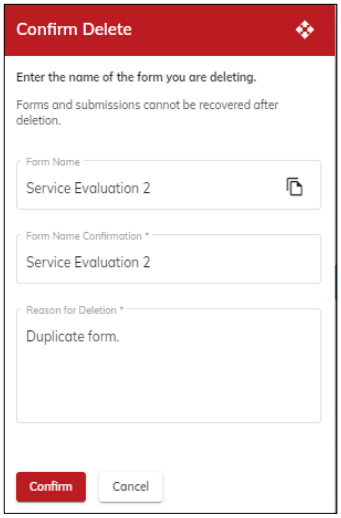
Select the form from the Form and Report Designer menu and click (Copy) in the toolbar. Enter a new name for the form in the pop-up window and click Save.

Roles, emails, workflow, and reports are copied with the form. You may want to double-check that the copied information also applies to the new form.

DELETING A FORM

If a form is no longer in use, you can delete it and it will no longer be downloaded to any tech's devices, or be available to view, edit, export or report.

Select the form from the Form and Reports menu and click (Delete) in the toolbar. The Confirm Delete window appears.



Enter the exact name of the form you want to delete along with a reason for the deletion. Click **Confirm** to delete the form.

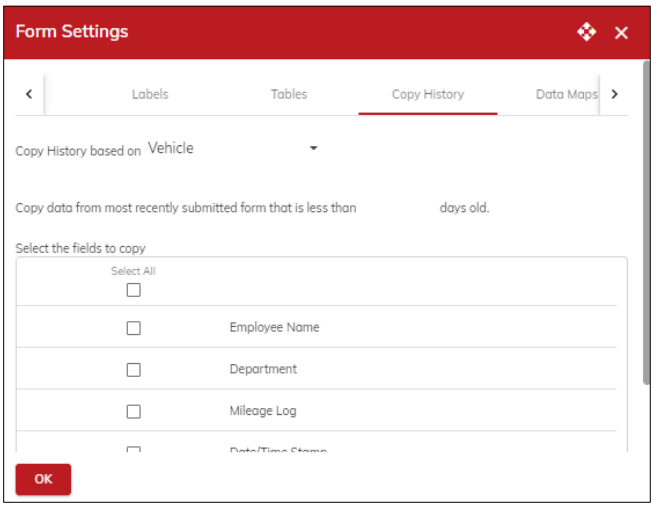
TIP: You may want to "unpublish" a form before deleting. By unpublishing, it will no longer be available to download to devices, essentially disabling the form, allowing time to make a final decision about its use before deleting.

COPYING FORM HISTORY

Each form can be individually set up to copy data from a previously submitted form. The setup is completed in the designer, but the mobile user copies the data using the app. The settings are found on the Form Settings window, in the Copy History tab. (See above in the New form procedure.) For example, you have a furnace inspection form that follows standards. In most instances, the furnace inspections are very similar and it's easier for your techs using the mobile app to record only the changes from the last inspection, rather than recording each task step individually. You can set copy settings so that whenever a new inspection form is started, and this furnace is selected, data from the most recent inspection will auto-populate the fields on the form according to your settings.

NOTE Finish designing your form before setting copy history. The copy history settings use the fields on your form for options.

1. From the Form Default Settings window, click **Copy History** to open the Copy History tab.



2. Select the input that you want to base your copy on. This is the "key field" for your copy. Only lookup input types can be used to copy history on. For example, if your form is a furnace inspection, you'd want to select the field where the furnace is entered on the form. (Lookup fields that are marked to allow multiple selections aren't available for basing history.)
3. Set the age of your history to copy. For example, if you don't want to copy furnace inspections that are more than 2 months old, you'd enter 60. This will find the newest submission for the key field as long as it's less than 60 days old. Anything older than the number of days set here will not be returned to the app.
4. Select the fields from the form that will display historical data. All of the fields with the exception of signatures will appear in the list. These are the fields that will be auto populated with the data from the most recent submission (that meets the days old requirement). The app user can review and edit as needed.
5. Click **OK** to save your settings. Be sure to click **Save** on the form designer as well.

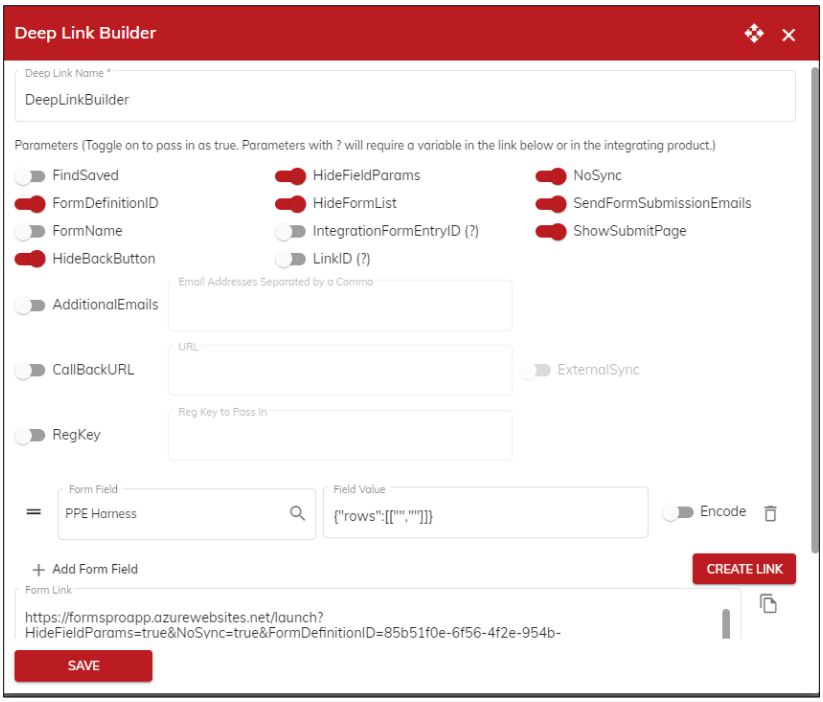
When the mobile app user selects this form and enters data in the “key field” all the fields selected to copy will auto-populate. There is no other action needed by the mobile app user.

BUILDING DEEP LINKS

Deep links are used to pass data from another application into a FormsPro form. A deep link is a URL link, that when clicked, the app will open a form with the values and operating conditions specified using the deep link builder.

If you are unfamiliar with information in this procedure, contact your IT department or support@omnibyte.com for help.

1. From the Form Default Settings window, click **Deep Links** to open the Deep Link Builder.



2. Enter a name for the deep link.
3. Toggle on/off the parameters for the deep link you are building.

Parameter Name	Parameter Description
FindSaved	When toggled on, FormsPro uses the IntegrationFormEntityID to find the form on the saved tab.
FormDefinitionID	The FormDefinitionID of the form that the app tries to open when loaded.
FormName	The name of the form that the app tries to open when loaded.
HideBackButton	Hides the back button in the app to prevent the user from returning to the FormsPro homepage.

HideFieldParams	Hides the bar at the top of the main menu in the app that displays the values that were passed in.
HideFormList	Hides the FormsPro homepage when opening a form from a deep link.
IntegrationFormEntityID (?)	A unique ID that can be used by the app deep linking into a FormsPro form to identity that form submission.
LinkID (?)	A unique ID that can be used to group multiple form submissions by the app deep linking into FormsPro. For example, a service call may be “linked” to multiple safety form submissions.
NoSync	Toggle on if FormsPro needs to sync when deep linked into.
SendFormSubmissionEmails	Toggle on if FormsPro should send submission emails when the form is submitted.
ShowSubmitPage	Toggle on if FormsPro should show a page that says “Form Submitted” rather than taking the user back to the forms listing.
AdditionalEmails	Toggle on to require the emails to be added to the email list at the bottom of the form.
CallBackURL	Toggle on and enter a URL to deep link into another app after a form is saved or submitted.
RegKey	Allows the deep link to pass in a registration key, therefore bypassing registration key entry when opening FormsPro.

4. Add any fields you want to include in the deep link along with the value you want them to contain.
5. When a static or dynamic table is selected as the Form Field, the Field Value is an array of rows that contain an “outline” of the table columns so that you only need to enter the values in the appropriate rows. You can leave any values blank. When a table is being passed in, the whole table is brought in at once as a whole. Passing the value for a static table and a dynamic table differ slightly. For example:

   Static Table: {“rows”:[[“”, “text”, 4,”hi”],[“”,”text3”,6,”hello”]]}

   Dynamic Table: {“rows”:[[“text”, 4,”hi”],[”text3”,6,”hello”]]}

   The value is an object containing an array of rows. Each row needs to have the exact number of values for the number of columns in the table. Static table values need to include a blank string at the beginning of each row array because of the label column.

   A blank string is passed for any other cells that aren’t being filled by the deep link.

   If more than one row is passed for a dynamic table value, then a new row is created int eh dynamic table for each extra row passed in the deep link value.
6. Click **Create Link** to create the deep link. Once the link is created, you can edit any of the information in the link as needed. The Copy button can be used to copy the link into the integrating product as needed.

7. Click **Save**. Saving the deep link allows you to make changes later if the form changes or your data in the integrating product changes.

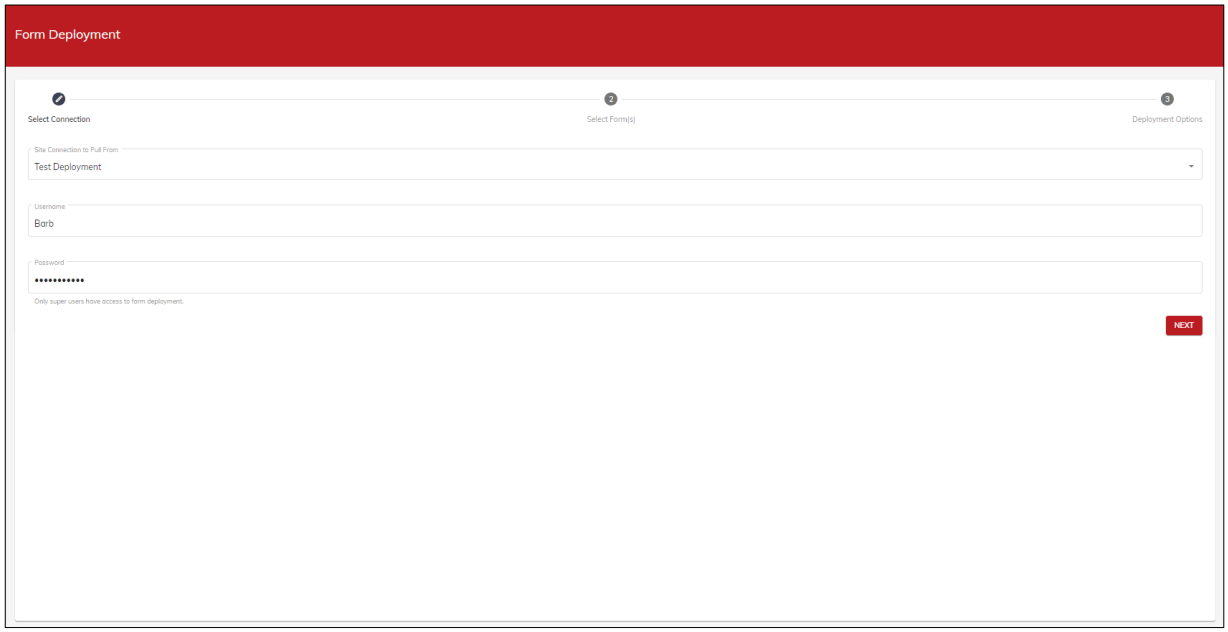
FORM DEPLOYMENT

Use the Form Deployment window to deploy your forms, and all associated components, from site to site. For example, you can use a "Test" site to create and test your forms, reports, data mapping, and submissions. Then, when you're ready to begin using the form, you can deploy it to a "Production" site without a lot of additional resetting of dynamic fields or integration information.

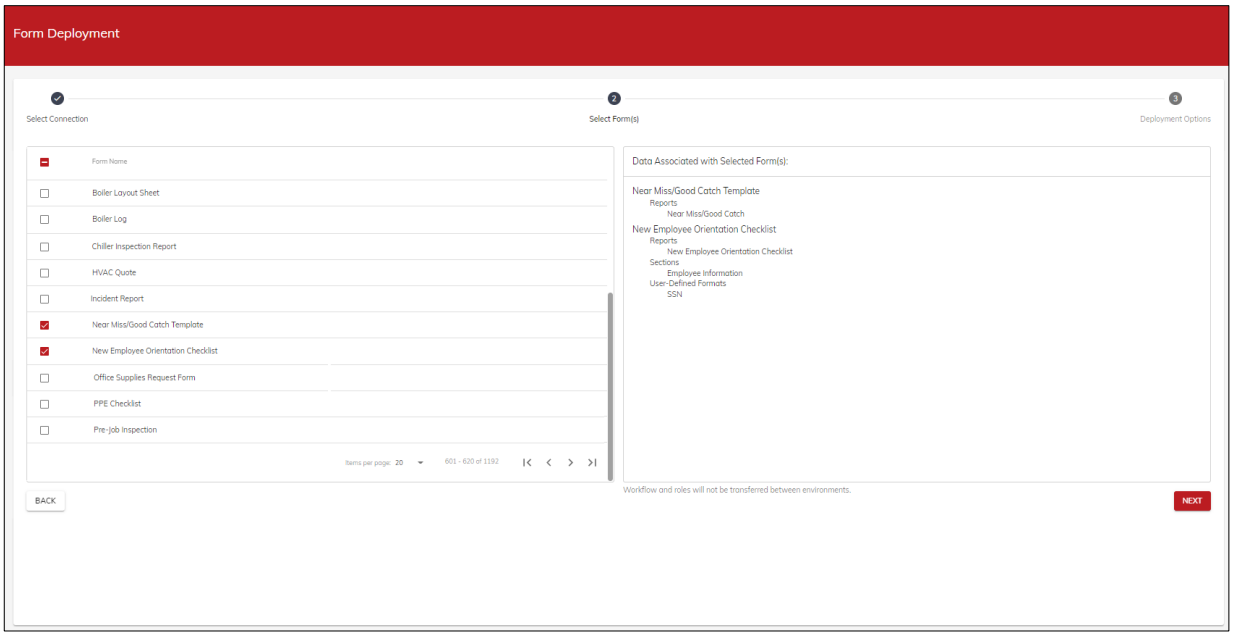
A data connection to the other FormsPro site, from which you want to deploy, needs to be set up before you can deploy forms. Deploying forms is always done from the site you want the form to be in. For example, if you’re deploying from “Test” to “Production” all the work you do here is using the “Production” site. You need to select Deployment Connection as the connection type and enter the site’s URL. In this example, you’re using the “Production” site and the connection is to the “Test” site.

When doing a deployment, you must also have Super User access to the site you’re moving the forms from. Only super users can deploy forms.

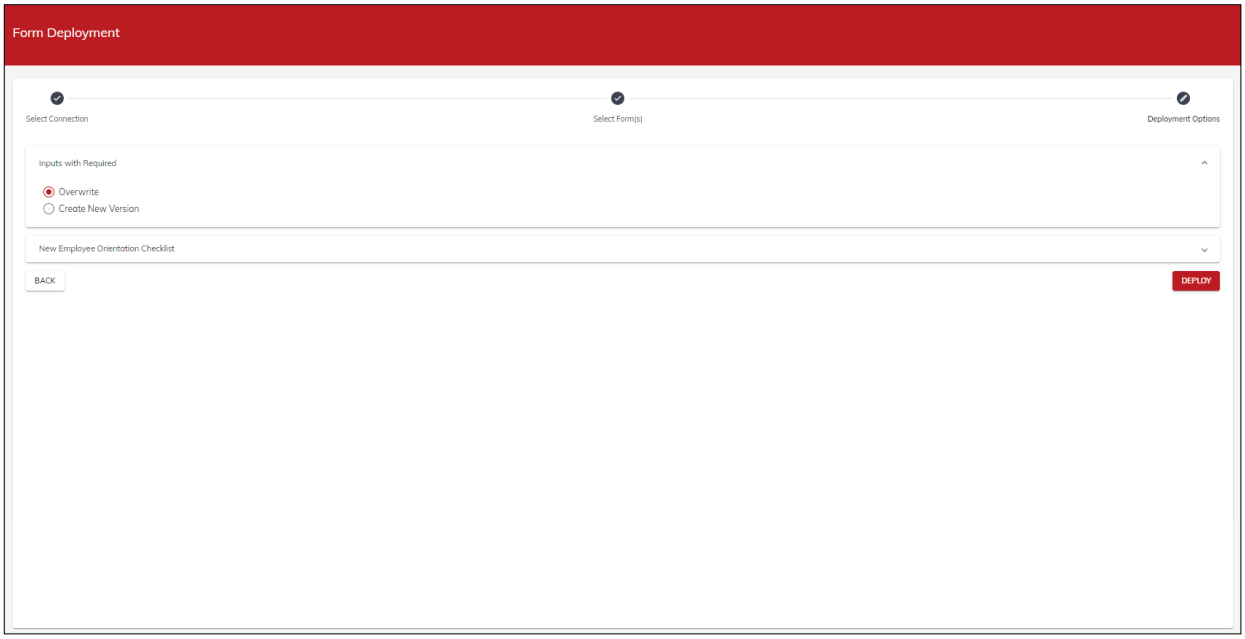
1. From the **Form and Report Designer** menu, select **Form Deployment**. The Form Deployment page opens.



2. Select the site connection from which you are deploying forms, then enter a username and password for the connection. You must use a user that is a Super User in the “from” site to continue. Click **Next**.



3. Select the forms you want to deploy. Each form appears in the Data Associated with Selected Form(s) list. Although dynamic fields and data sets will deploy with the form, any connections must also be in place in the site. In this list, you can verify that the site has all the connections necessary for the deployment to take place. For example, if your form has attachments, you must have data connections for attachments in the "Production" site. Click **Next**.



4. Depending on the deployment scenario, enter information for the selected forms:

   - When a form does not exist in the new environment, you will be asked to select what folder the form will be in. You will have the option to put the form in the default Forms folder.
   - When a form exists in the environment and does not have versioning turned on, you will have the option to overwrite the form or create a new version. Versioning will turn on if "create a new version" is selected. If the version is selected, enter a version name and version comments.

- When a form exists in the environment and has versioning turned on, you will be asked to enter a version name and version comments for the form. When you are exporting a form that has versioning turned on you will be exporting the latest version of the form. When you import a form with versioning turned on the versioning will be turned off until you turn it on. When naming the new version of the form the version name box will autofill in with the version number the form will be. You will not have the option to overwrite in this case.

5. Click **Deploy**. A message will appear that the deployment was successful. After a form has been deployed, you can view the submission in the Deployment Log.

   If using a child form, the child form does not deploy the child form itself. However, it does deploy the form settings. Therefore, we recommend deploying both the parent and child form together.

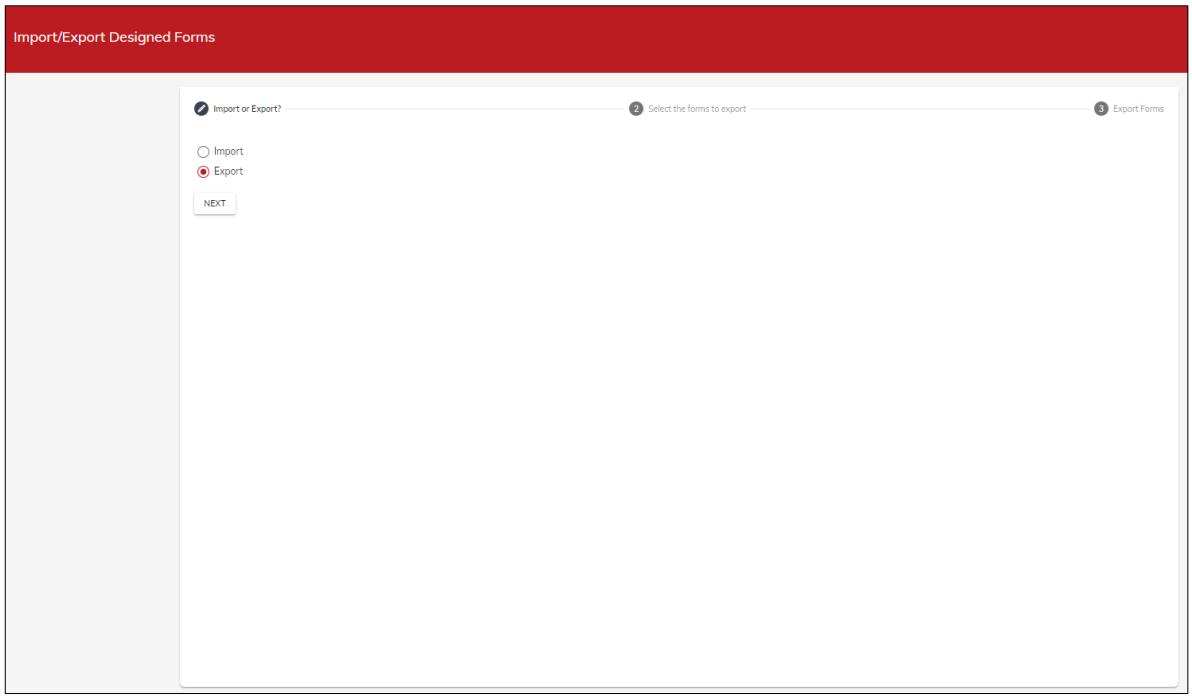
IMPORT/EXPORT DESIGNED FORMS

Designed forms can be imported and exported from other OmniByte FormsPro installations. For example, if OmniByte created a demo form that you'd use frequently, you can import that form into your system. Likewise, if you know a separate organization that could benefit from a form you designed, you can export that form to that organization.

This procedure is different from exporting a submitted form. The difference is that designed forms are imported and exported without data, it's just the form design. Submitted forms have been completed and submitted from the app and contain data you want to store in another location.

EXPORTING DESIGNED FORMS

1. From the **Form and Report Designer** menu, select **Import/Export Designed Forms**. The Import/Export Designed Forms page opens.

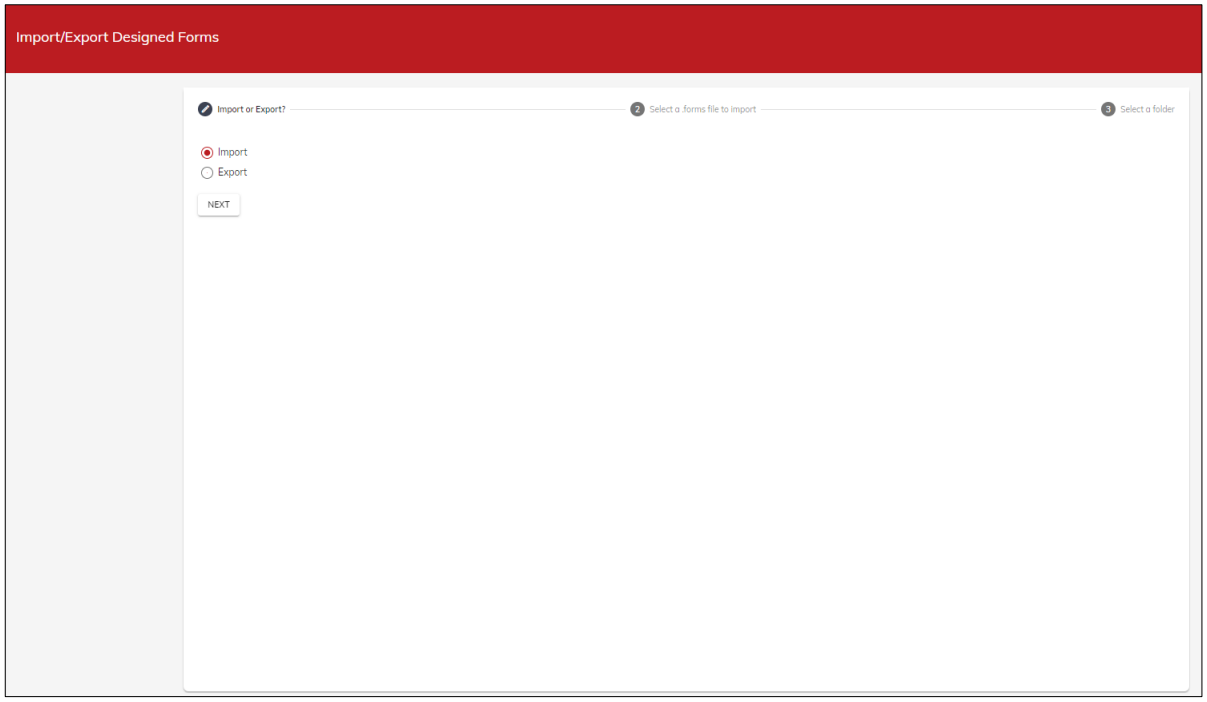


2. Select **Export** and click **Next**.

3. Mark the box next to the forms you want to export. Click **Next**.
4. Click **Export**. Depending on the browser you use, you will have options for the location to save the .forms file.

IMPORTING DESIGNED FORMS

1. From the **Form and Designer** menu, select **Import/Export Designed Forms**. The Import/Export Designed Forms page opens.



2. Select **Import** and click **Next**.
3. Click **Choose File** to select a FormsPro file. Only files with the .forms extension can be imported. Any other type will fail. You can import only one file at a time. Click **Next**.
4. Select a folder to store the file and click **Import**.
5. Open the form from the folder you stored it in and be sure to assign users before it can be used.

If you import a form with dynamic fields, you may need to reset those fields because the data connections used on dynamic fields will be lost. When you open the form, you'll see a message that the fields are invalid.

OPERATIONS MENU

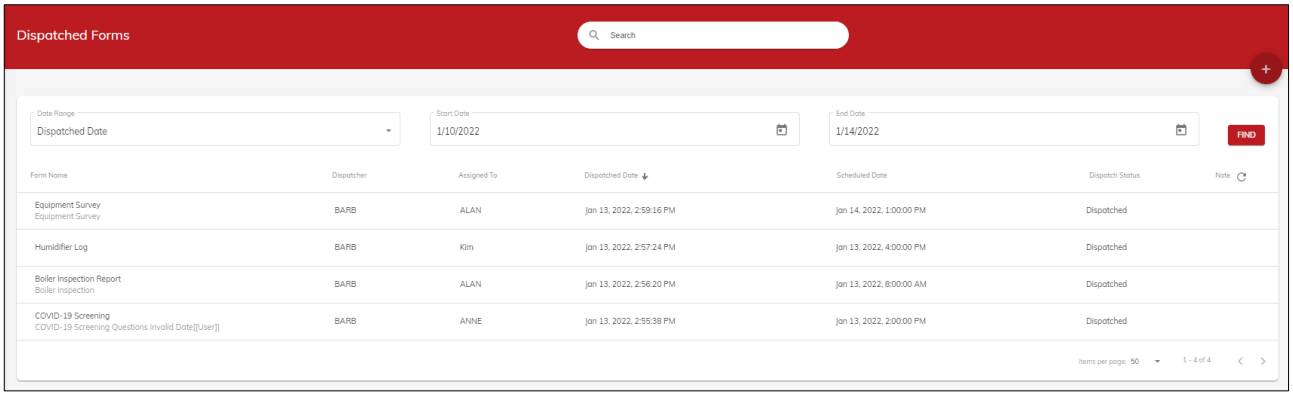
Use the Operations menu to schedule and dispatch forms, create notifications, and email envelopes.

DISPATCHED FORMS

A dispatcher can start a form and send it to a technician to complete at a scheduled time. The Dispatched Forms page displays the forms that have been saved prior to dispatching and dispatched forms. Once a form is submitted using the mobile app it no longer appears here. Use the View/Edit Submissions page to view submitted forms.

VIEWING DISPATCHED FORMS

1. From the **Operations** menu, select **Dispatched Forms**. The Dispatched Form page opens.



2. Select how you want to view the date range. Select **None** if you don't want to specify a date range. Select **Dispatched Date** to specify a range based on dispatched dates. Select **Scheduled Date** to specify a range based on scheduled dates.
3. Enter a start and end date for the date range you want to view.
4. Click **Find** to view the dispatched forms based on your date range. The dispatched information includes the form name, who dispatched the form, who the form is dispatched to, the dispatched date, the scheduled date, the status of the dispatch, and a note, if applicable.
5. Forms that are scheduled and saved, but not yet dispatched can be found here too. They have a blank dispatched date. Double-click to open the form and complete the dispatching.

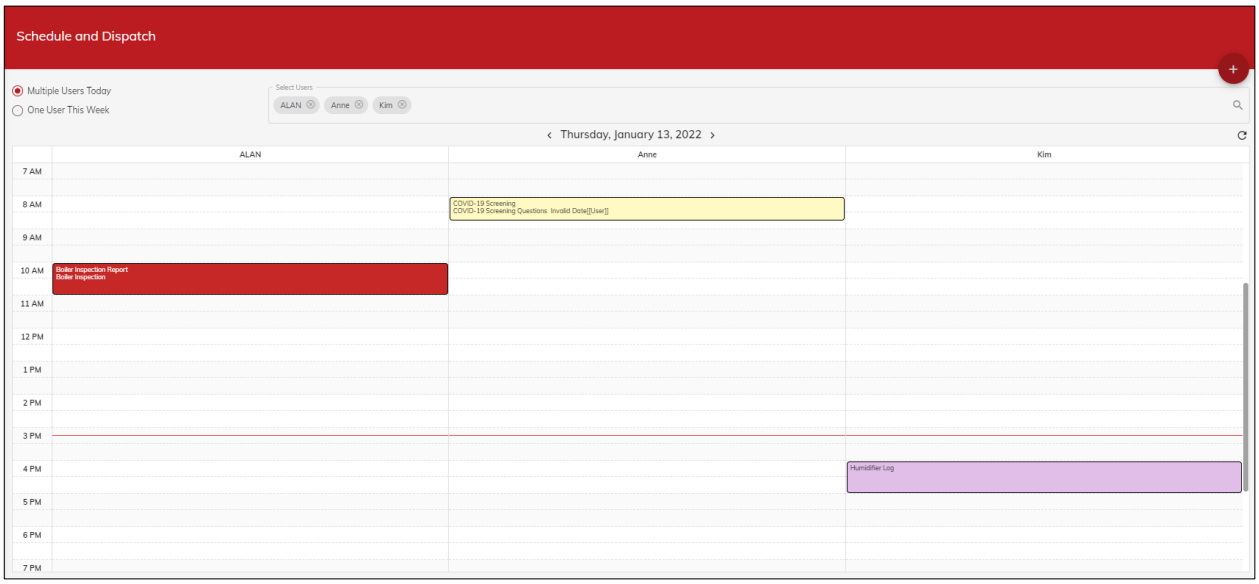
   NOTE Click (Refresh List) to refresh the page with any new dispatched forms and removed forms that were submitted.

SCHEDULE AND DISPATCH

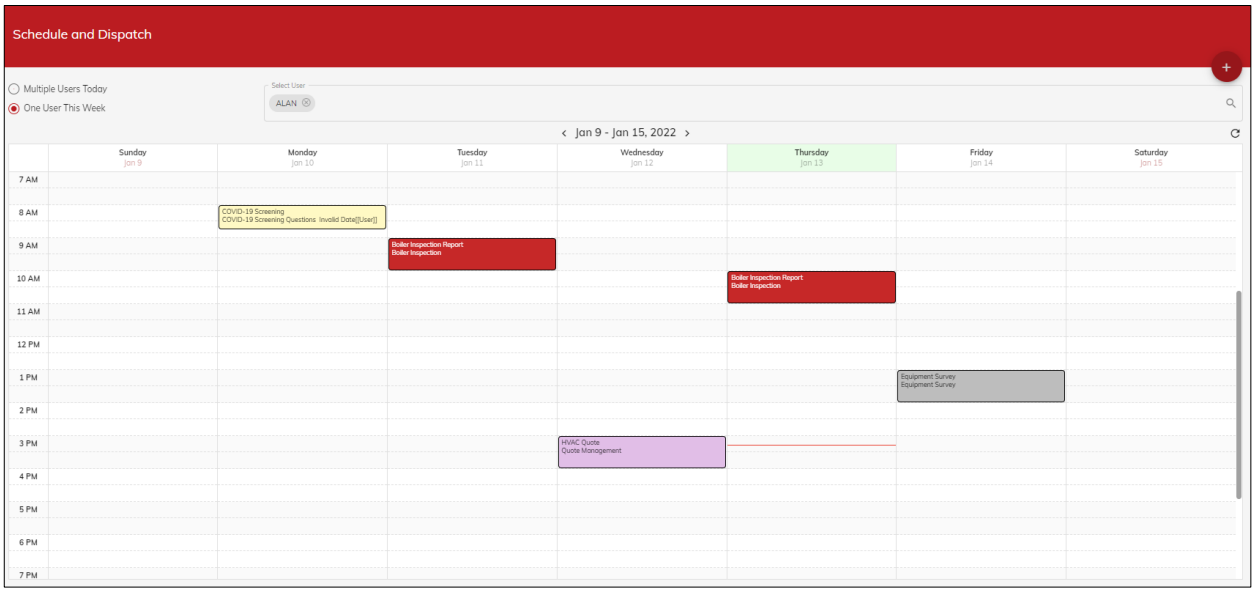
The Dispatch Schedule page displays all the dispatched forms in a new calendar view that allows you to see a technician's schedule. Viewing this information in a calendar view is very helpful to avoid overlapping or double-booking a technician.

1. From the **Operations** menu, select **Schedule and Dispatch**. The Schedule and Dispatch page opens.

2. Select **Multiple Users Today** to view schedules for multiple users for one day. Then select the users for which you want to view schedules. The following illustration shows Alice's and Barb's schedules for Monday, April 27th, 2020.



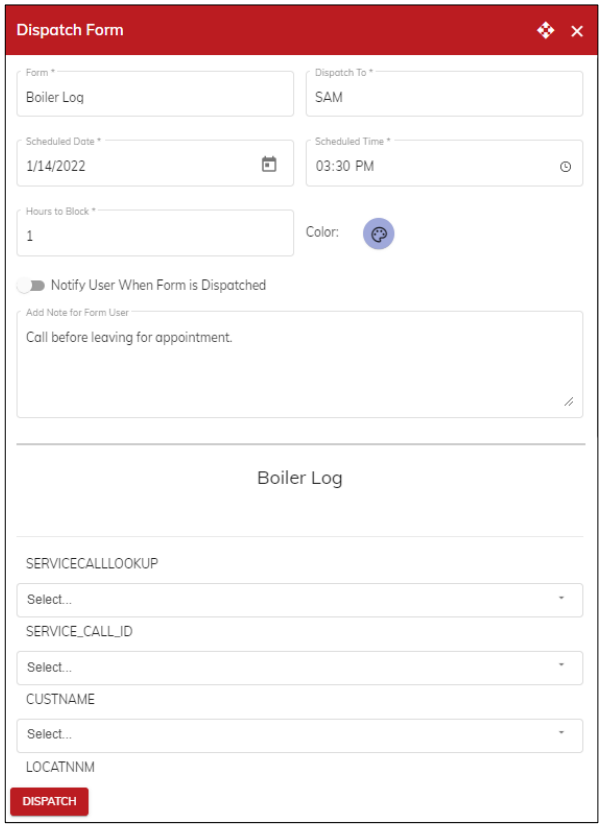
Select **One User This Week** to view schedules for one technician for a week. Then select the user for which you want to view the schedules. The following illustration displays Barb's schedule for the week of April 26th, 2020.



3. To create a new dispatched form, simply double-click on the empty time slot to open the Dispatch Form window.

ADDING A DISPATCHED FORM

1. From the Dispatched Forms or Schedule and Dispatch page, click the **Add** button to open the Dispatch Form window. You can also open the Dispatch Form window by double-clicking in the calendar in the Schedule and Dispatch window. The user, date and time will automatically fill in based on where you click in the calendar.



2. Select the form that you want to dispatch.
3. Select the user to whom you want to dispatch the form.
4. Enter the date and time to dispatch the form. You can leave these fields blank, and the form is dispatched as soon as you click the Dispatch button. The date and time the form was dispatched is assigned as the scheduled time.

   Once a date is entered, you must enter a time and vice-versa.
5. Enter the number of hours to block off and select a color to block the time on the schedule. Although you can block a very small amount of time, we don't recommend using that small amount of a time block because the form may be hard to click on the schedule.
6. Toggle the **Notify User When Form is Dispatched** on if you want to notify the technician when the form is dispatched. Notifications are sent to the technician's device when a form is dispatched, updated, or deleted when this option is on so use your best judgment how often and when to send notifications.
7. Enter any applicable notes. The note is only visible to the user to whom the form is dispatched. It does not appear on the submitted form or report. Any notes that are entered in the Dispatch Form window are included in the notification sent to the user to which the form is dispatched.

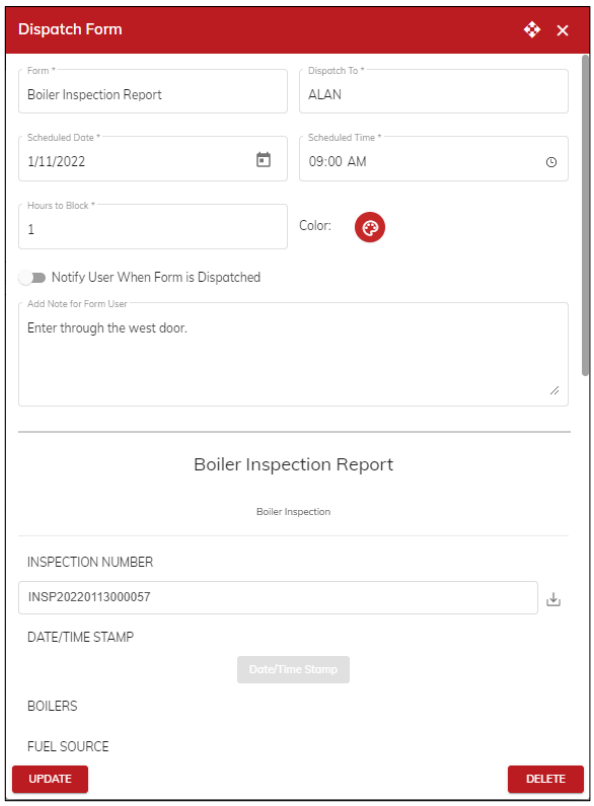
If the form contains an auto-incrementing number, the number is retrieved when the form is dispatched or when the Get Number Value icon is clicked.

8. Scroll down the Dispatch Form window to pre-fill parts of the form that you want completed for the user to whom the form is dispatched.
9. Click **Dispatch** to dispatch the form to the technician's device. Click **Save** to save the form for sending later.

EDITING/DELETING A DISPATCHED FORM

Any changes made to a dispatched form is reflected in the Dispatch Schedule page. If you need to remove a dispatched form from a technician's device, you can delete it. It will no longer be available to view, edit, export or report. Previously dispatched forms can be edited with updated times or hours. You can also dispatch a form to a different user by changing the name of the user to whom it's dispatched.

1. Select the form that you want to edit or delete from the Dispatched Forms list or double-click on the scheduled form from the Dispatched Schedules page and the Dispatch Form window opens.

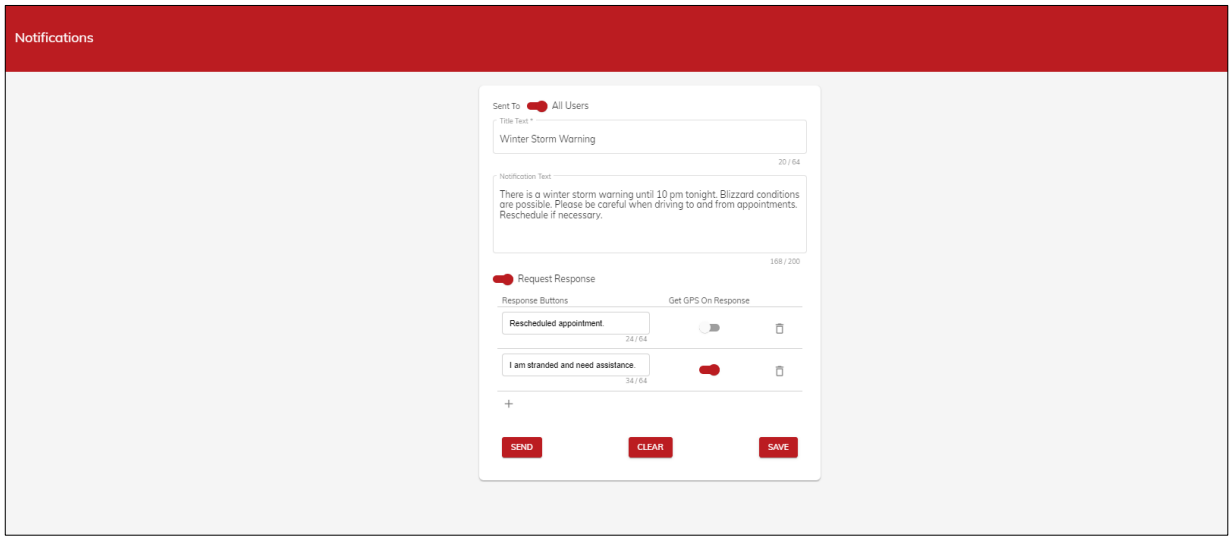


2. Make your changes, then click **Update**. This will re-dispatch the form to the user and update the schedule on the admin site. If you change the user the form is dispatched to, the form is automatically removed from the first user's device and dispatched to the second user. Any changes made to already dispatched forms will be reflected in the Dispatch Schedule page.
   To delete the form, click **Delete**. If the form has been dispatched, it is removed from the device.

NOTIFICATIONS

There may be times when an administrator needs to send important information, such as in emergency situations, to groups or individuals.

1. From the Operations menu, click **Notifications**. The Notifications page opens.



2. Select to whom you want to send the notification:
   - **All Users** – The notification is sent to every user in FormsPro.
   - **Teams** – The notification is sent to the users in the teams selected. Duplicate users are ignored and receive the notification only once. For example, a user that is both part of a team working on a site and part of a team by location receives the notification only one time. Teams can be used in combination of individual users and users by role.
   - **Individual Users** – The notification is sent to selected individual users. This selection can be used in combination with teams and users by role.
   - **Users by Role** – The notification is sent to users in a role. Duplicate users are ignored and receive the notification only once. Duplicates across multiple selection types are ignored. For example, if a user is in the team selected and the role selected, the user gets the notification only one time. This selection can be used in combination of individual users and teams.
3. Enter a notification subject in the **Title Text** field. This information provides a notification title and helps identify the notification in the Notification Log. The title can be up to 64 characters.
4. Enter the notification you want to send in the **Notification Text** field. The text can be up to 200 characters.
5. Toggle the **Request Response** option on to request the recipients of the notification indicate it was received and are taking appropriate action. Enter appropriate response button text in the **Response Text** field(s).

   If the Request Response toggle is turned on, at least one response button must be entered to send the notification. You can enter up to 5 buttons to respond to a notification. Each response can be deleted.

6. Toggle the **Get GPS on Response** on to retrieve the GPS coordinates from the user's when they select the response. This is useful for emergency situations when a user may need assistance. The device's Location Services must be enabled for GPS responses.

   We recommend that you make sure your users are aware of this GPS functionality since there is no way to restrict its use. In addition, this feature should be used in emergency situations only and not as a means of checking up on employees.

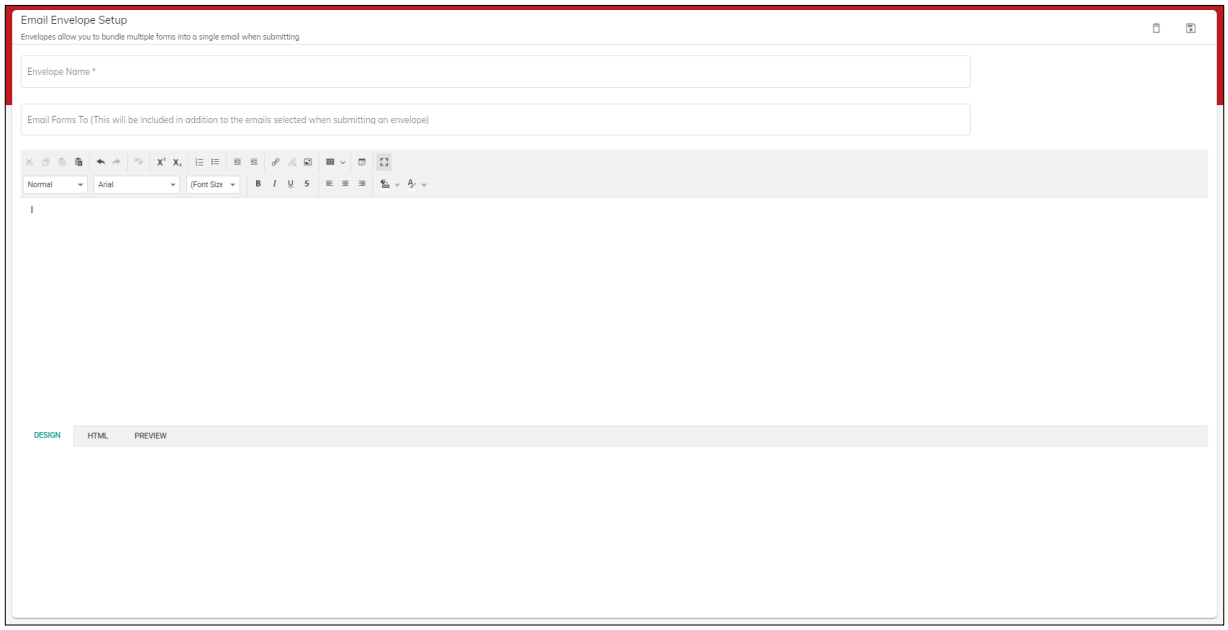
7. Click **Send** to send the notification. A record of the notification appears immediately in the Notification Log. Click **Save** to save the entry to the current browser session. This is helpful if you start a notification but leave the Notifications page to take care of something else. When you come back to the Notifications page the saved notification is on the page. Once the browser is closed, the information is cleared. Click **Clear** to clear the data on the page.

EMAIL ENVELOPES

Email envelopes allow you to bundle multiple forms into a single email. Like mailing a group of paper documents, email envelopes allow you to create email text, which would be like a cover letter; then assign a form to an envelope, which would be similar to stacking the forms to be filled out as a group. Then, once the forms are completed, they are sent together in the envelope to the recipients you choose.

First, set up the envelopes.

1. From the **Operations** menu, select **Email Envelopes**. Click **New Envelope**. The Email Envelope Setup window opens.



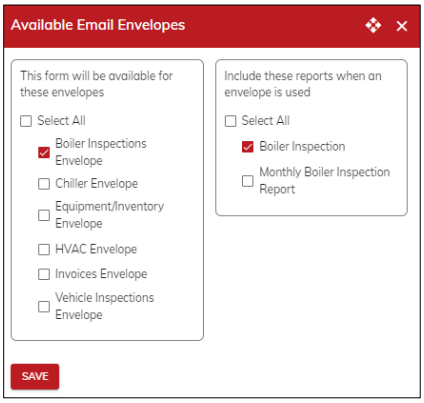
2. Enter a name for the envelope. The name is used to assign forms to envelopes and on the app to begin working on a “set” of forms to send together.
3. Enter email addresses for sending the envelope to, if this envelope is consistently sent to the same recipients. If the recipient of the envelope is different each time the forms are completed and emailed, do not enter those email address here. The email addresses can be entered later when completing the forms and envelope in the mobile app.
4. Enter email body text to include on the email that contains the forms. (The email subject is entered on the app when the forms are completed.)
5. Click (Save). This envelope is now available to select for individual forms.

If you are using multiple emails for a form that’s in an envelope, the envelope email is sent in the place of the default email. However, conditional rules on an email send those conditional emails once the envelope has completed processing.

ASSIGNING FORMS TO ENVELOPES

Once an email envelope is created, you can assign forms to it. Then, in the mobile app, the user selects an envelope, then works the forms assigned to it, and sends the associated report PDF attachments as a group.

1. In a saved form, click (Envelopes). The Available Email Envelopes window opens.



2. Select the envelope in which to send the form. A form can be included in multiple envelopes.
3. Select which reports to include for the form in the envelope.
4. Click **Save**.

Workflows on forms in an envelope are not interrupted by the envelope. The form continues to go through the workflow steps then sent and submitted with the other forms in the envelope.

When the envelope is emailed, the recipient receives the associated report for each form completed, and the form data is submitted for use in any integrations or exports.

SUBMISSIONS AND LOGS MENU

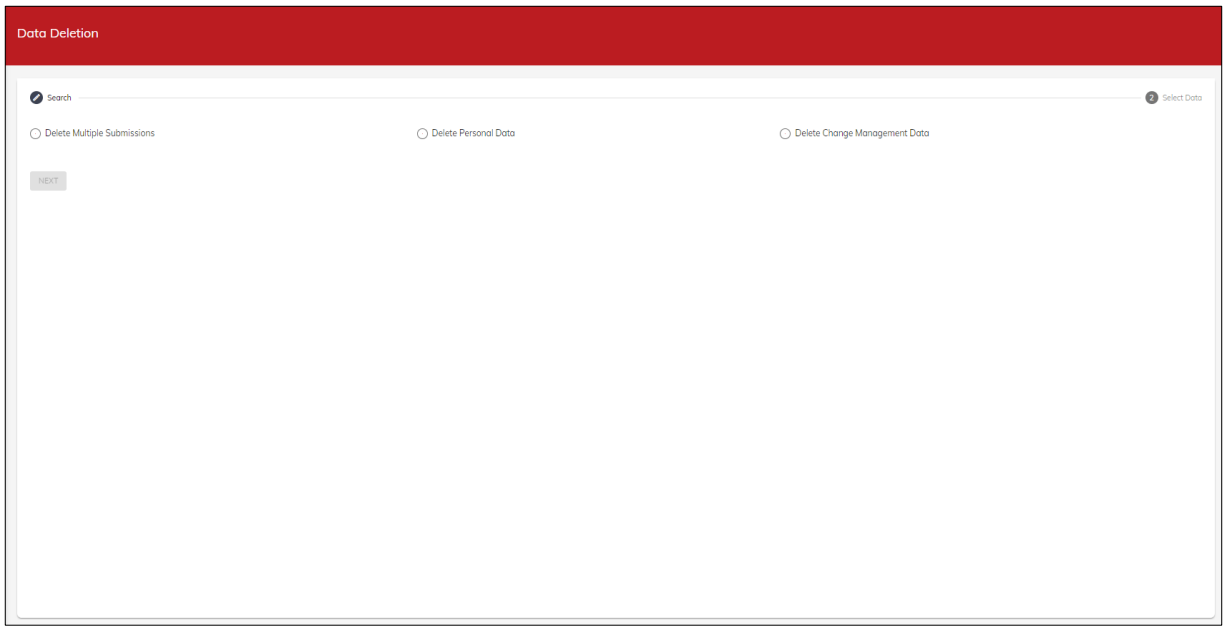
Use the Submissions and Logs menu to delete data, print event logs, view pending forms, export submitted data, and view and edit submitted forms.

DATA DELETION

The Data Deletion page is used to search for data in a database that an admin user wants to delete. You can delete multiple submissions, personal data, or change management data. Each type of deletion has a unique way to search for the data.

Data that is stored from data mapping is not deleted. You will need to log into where the data from data mapping is kept and delete it there.

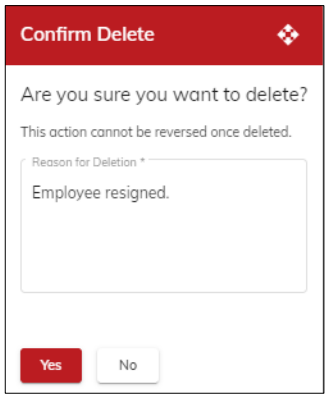
1. From the **Submissions and Logs** menu, select **Data Deletion**. The Data Deletion page opens.



2. Select the deletion method: Delete Multiple Submissions, Delete Personal Data, or Delete Change Management Data.

   - **Delete Multiple Submissions** Select to delete several form submissions. Enter the search criteria for the data deletion. You must have at least a form selected, or a search value entered. Click **Next**. The forms meeting your criteria appear. Expand the form and mark the information you want to delete.
   - **Delete Personal Data** Select to delete specific fields off a form. This option keeps non-personal data for analysis while deleting personal fields. Enter the keyword that you want to search for in the **Search Value** field(s). Click **Next** to display the list of forms that contain this data. Expand the form and mark the information you want to delete.
   - **Delete Change Management Data** Select to delete all change management before a specified date. To delete change management data, the Track Change Management option must be marked for the form in the Form Settings window.

3. Click **Delete**. The Confirm Delete window appears. Enter the reason for the deletion, then click **Yes**.

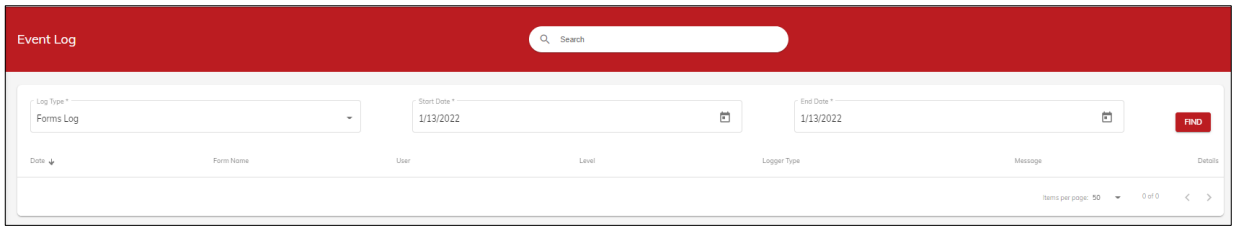


EVENT LOGS

You can view logs for events that occur in the web administration pages for forms, the API, data maps, developer events, or notifications.

The events displayed are only those that occur on the server. Since the mobile app is not running on the server, any events that occur on the mobile app are not in this list.

1. From the **Submissions and Logs** menu, select **Event Logs**. The Event Logs page opens.



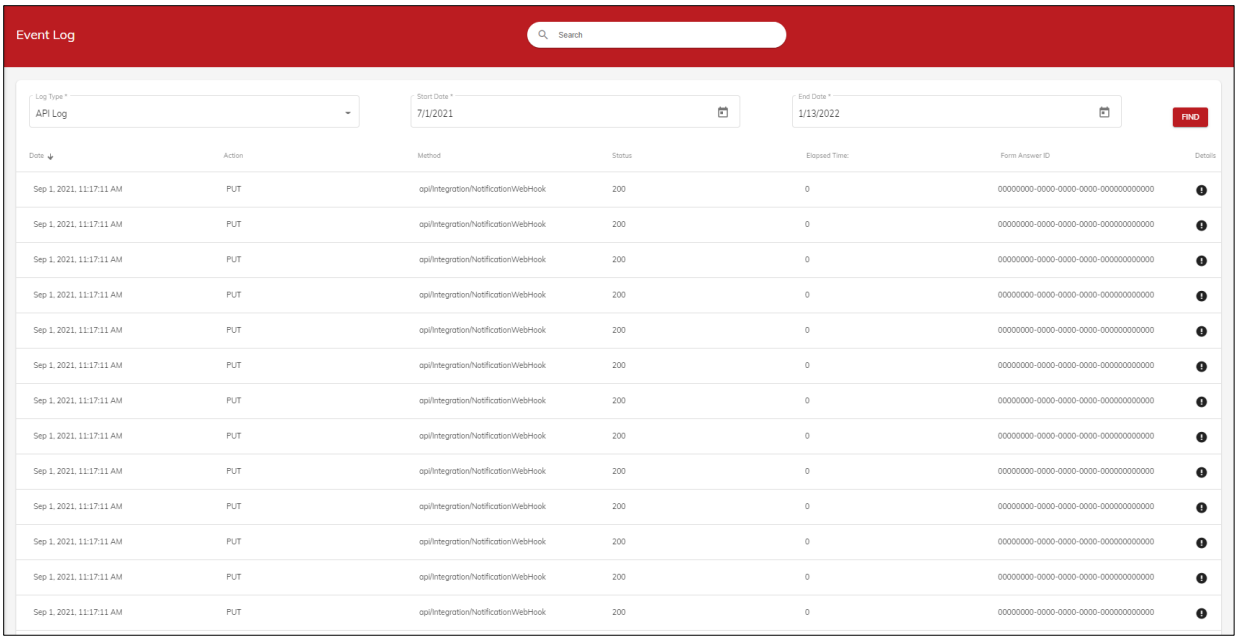
2. Select the log type – API Log, Change Log, Data Maps Log, Delete Log, Deployment Log, Developer Log, Forms Log, or Notification Log and enter a date range. Click **Find**.
3. The list of events that match the type and date range are displayed. You can click any of the column heading names to sort the list.
4. Click (Details) to view more information about the event.

Data map errors can be reprocessed by selecting the map and clicking **Resubmit Selected**.

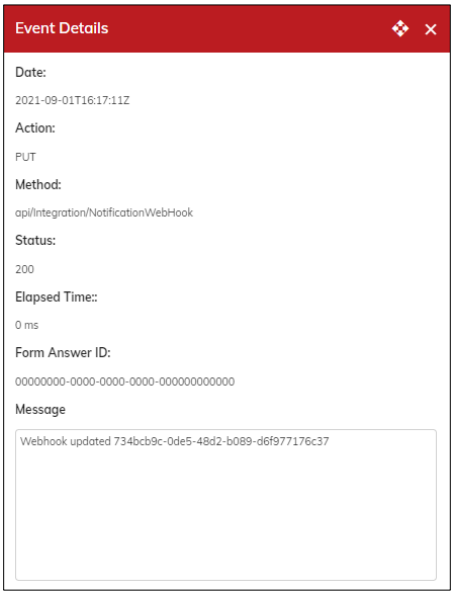
API LOG

If you have created your own integration, the API Log displays information and errors of the FormsPro actions when it was sending data to the integration.

1. Click **Event Logs** from the left menu and select **API Log** from the Log Type drop-down list.



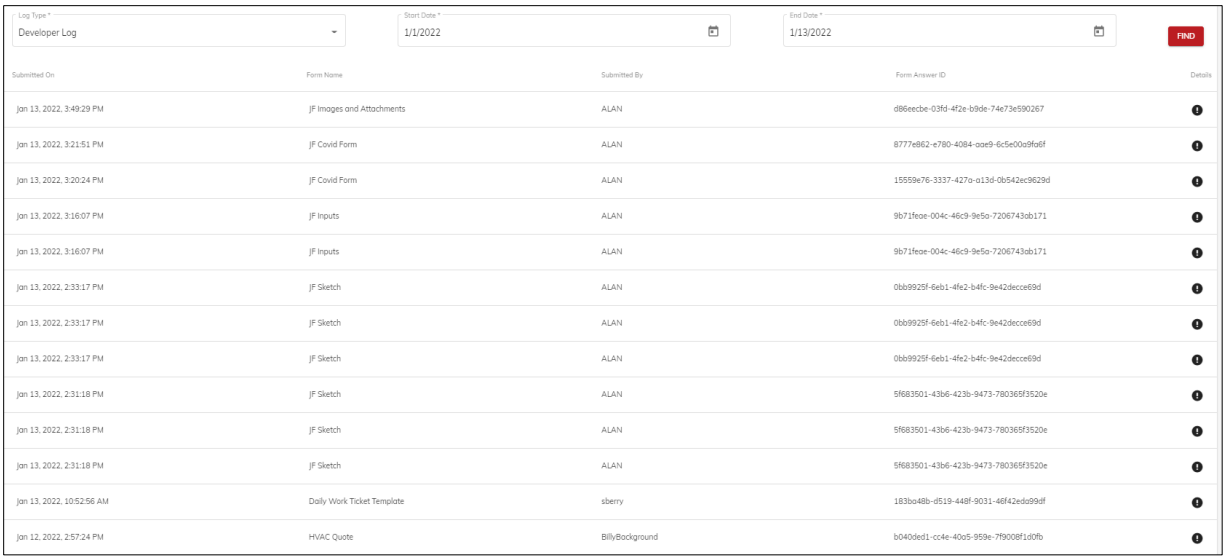
2. Enter a start and end date.
3. Click **Find**.
4. The date, action, method, status, elapsed time, and form answer ID entries are displayed.
5. To view more details, click the icon under the Details menu. The Event Details window opens and displays detailed information about the integration.



DEVELOPER LOG

The Developer Log provides information about what is posted to an integration when a form is submitted.

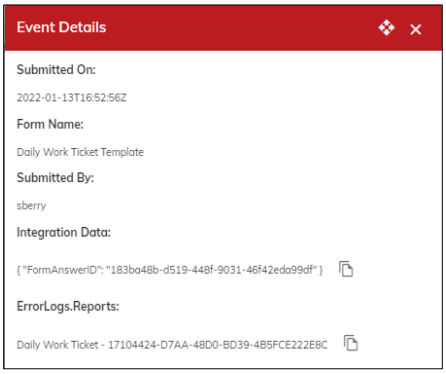
1. Click **Event Logs** from the left menu and select **Developer Log** from the Log Type drop-down list.



Log Type * Developer Log | Start Date * 1/1/2022 | End Date * 1/13/2022 | FIND

Submitted On	Form Name	Submitted By	Form Answer ID	Details
Jan 13, 2022, 3:49:29 PM	JF Images and Attachments	ALAN	d86eecbe-03fd-4f2e-b9de-74e73e590267	
Jan 13, 2022, 3:21:51 PM	JF Covid Form	ALAN	8777e862-e780-4084-aae9-6c5e00a9fa6f	
Jan 13, 2022, 3:20:24 PM	JF Covid Form	ALAN	15559e76-3337-427a-a13d-0b542ec9629d	
Jan 13, 2022, 3:16:07 PM	JF Inputs	ALAN	9b71feae-004c-46c9-9e5a-7206743ab171	
Jan 13, 2022, 3:16:07 PM	JF Inputs	ALAN	9b71feae-004c-46c9-9e5a-7206743ab171	
Jan 13, 2022, 2:33:17 PM	JF Sketch	ALAN	0bb9925f-6eb1-4fe2-b4fc-9e42decce69d	
Jan 13, 2022, 2:33:17 PM	JF Sketch	ALAN	0bb9925f-6eb1-4fe2-b4fc-9e42decce69d	
Jan 13, 2022, 2:33:17 PM	JF Sketch	ALAN	0bb9925f-6eb1-4fe2-b4fc-9e42decce69d	
Jan 13, 2022, 2:31:18 PM	JF Sketch	ALAN	5f683501-43b6-423b-9473-780365f3520e	
Jan 13, 2022, 2:31:18 PM	JF Sketch	ALAN	5f683501-43b6-423b-9473-780365f3520e	
Jan 13, 2022, 2:31:18 PM	JF Sketch	ALAN	5f683501-43b6-423b-9473-780365f3520e	
Jan 13, 2022, 10:52:56 AM	Daily Work Ticket Template	sberry	183ba48b-d519-448f-9031-46f42eda99df	
Jan 12, 2022, 2:57:24 PM	HVAC Quote	BillyBackground	b040ded1-cc4e-40a5-959e-7f9008f1d0fb	

2. Enter a start and end date.
3. Click **Find**.
4. The submitted date, form name, submitted by, form answer ID are displayed.
5. To view more details, click the icon under the Details menu. The Event Details window opens and displays detailed information about the integration and submitted form.



Event Details

Submitted On:

2022-01-13T16:52:56Z

Form Name:

Daily Work Ticket Template

Submitted By:

sberry

Integration Data:

{"FormAnswerID": "183ba48b-d519-448f-9031-46f42eda99df"}

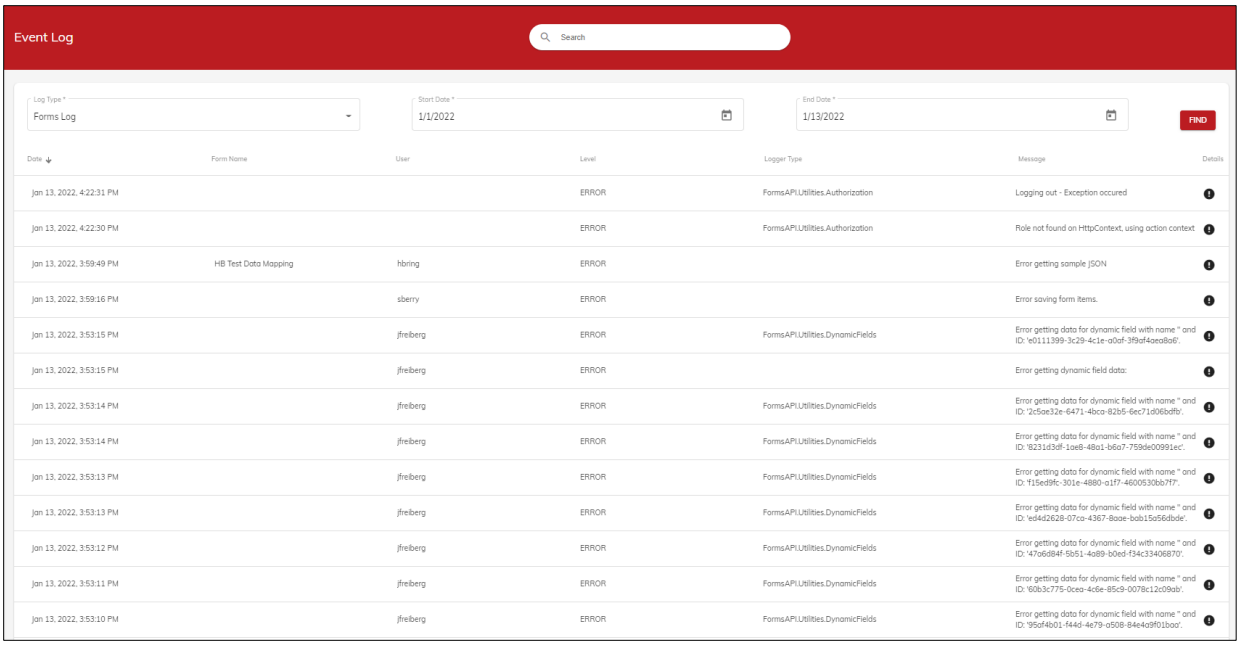
ErrorLogs.Reports:

Daily Work Ticket - 17104424-D7AA-48D0-BD39-4B5FCE222E8C

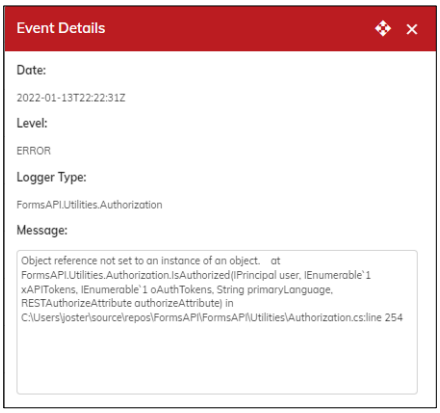
FORMS LOG

The Forms Log provides FormsPro error information.

1. Click **Event Logs** from the left menu and select **Forms Log** from the Log Type drop-down list.



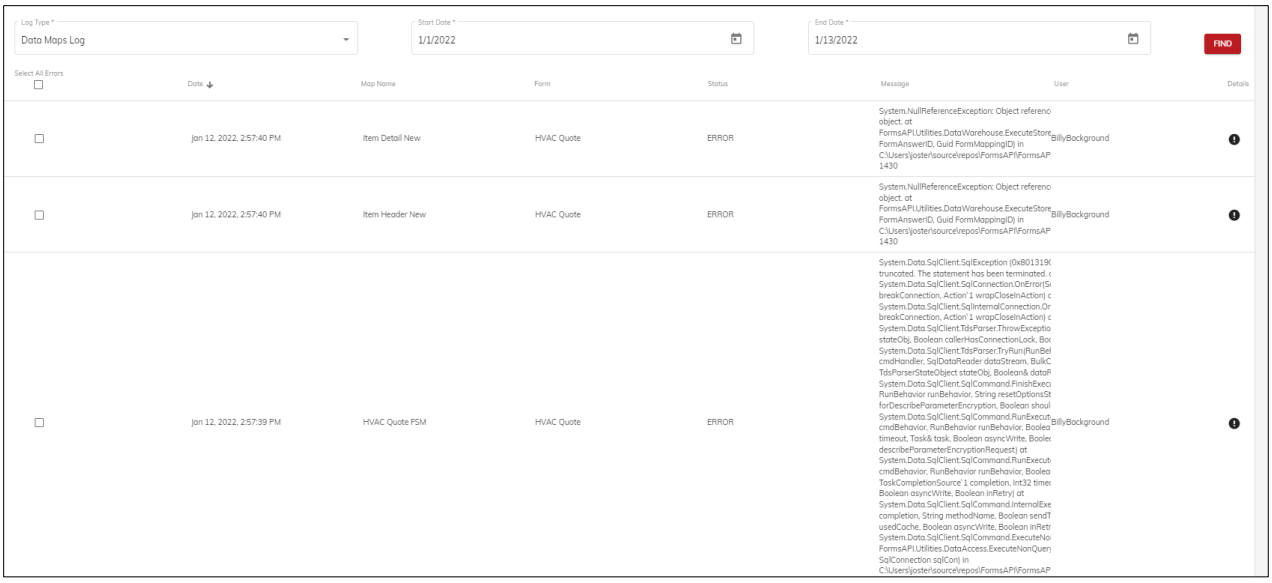
2. Enter a start and end date.
3. Click **Find**.
4. The date, level, logger type and message are displayed.
5. To view more details, click the icon under the Details menu. The Event Details window opens and displays detailed information about the error.



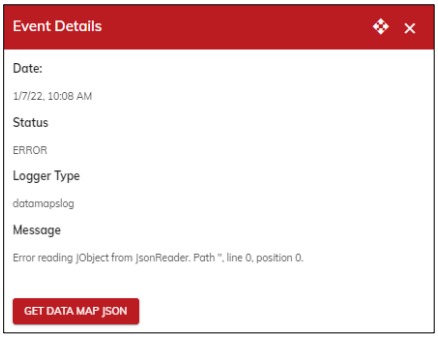
DATA MAPS LOG

The Data Maps Log provides error information for form data that has been mapped.

1. Click **Event Logs** from the left menu and select **Data Maps Log** from the Log Type drop-down list.



2. Enter a start and end date.
3. Click **Find**.
4. The date, map name, form, status, message and user are displayed.
5. Data map errors can be reprocessed by selecting the map and clicking **Resubmit Selected**.
6. To view more details, click the icon under the Details menu. The Event Details window opens and displays detailed information about the error.



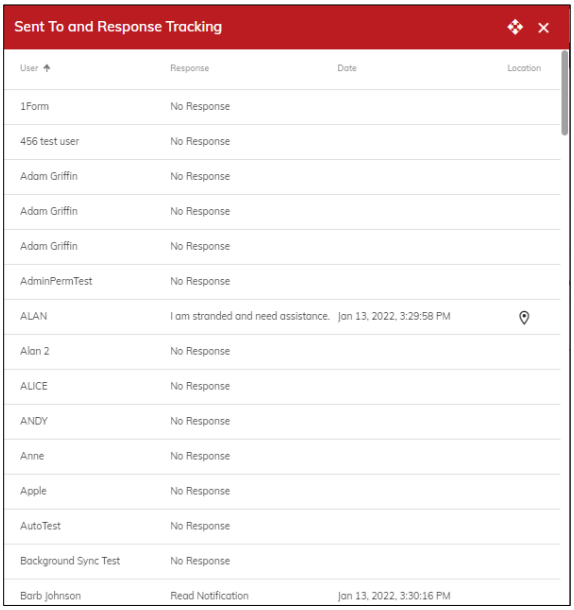
7. Click the **Get Data Map JSON** button to copy the JSON (JavaScript Object Notation).

NOTIFICATION LOG

The Notification Log provides the list of notifications that have been sent.

1. Click **Event Logs** from the left menu and select **Notification Log** from the Log Type drop-down list.

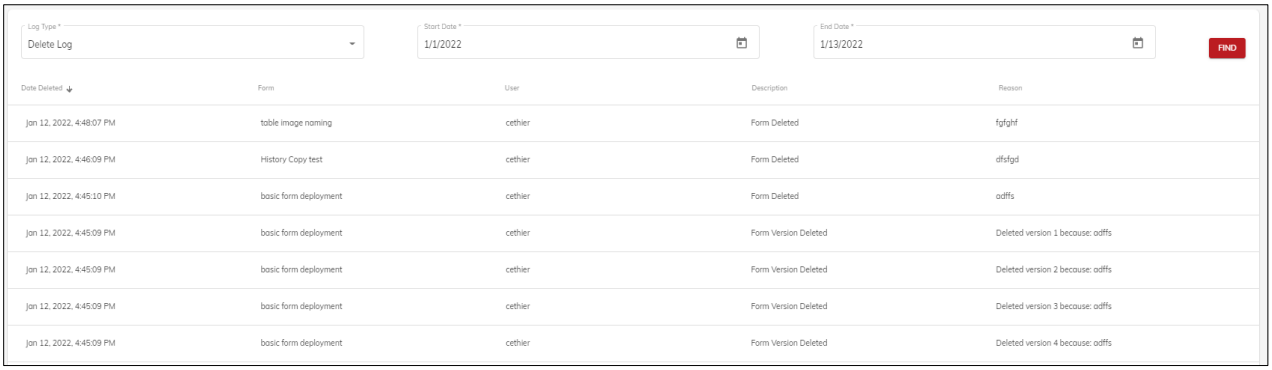
2. Enter a start and end date.
3. Click **Find**.
4. The date sent, sent by, title, and body are displayed.
5. To view more details, click the ⋮ icon under the Details menu. The Sent To and Response Tracking window opens and displays the notification response information.



DELETE LOG

The Delete Log displays each delete event that has occurred.

1. Click **Event Logs** from the left menu and select **Delete Log** from the Log Type drop-down list.

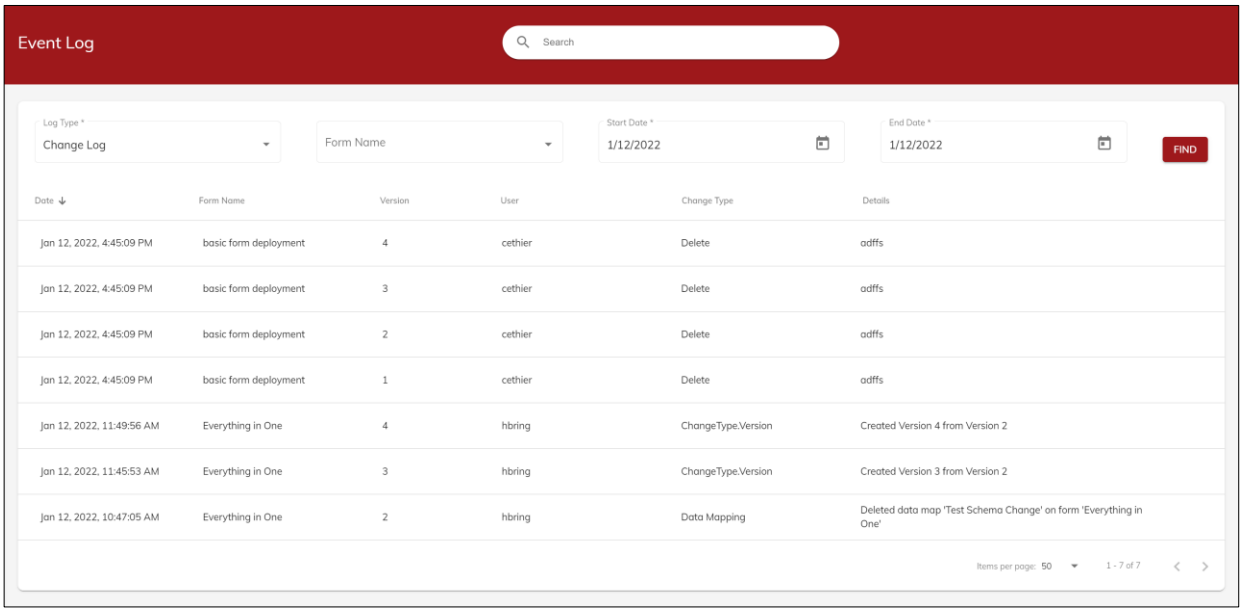


2. Enter a start and end date.
3. Click **Find**.
4. The date deleted, form, user, description, and reason for the deletion are displayed.

CHANGE LOG

The Change Log displays the changes that have been made to a form after every save and displays the version and is time and date stamped.

1. Click **Event Logs** from the left menu and select **Change Log** from the Log Type drop-down list.

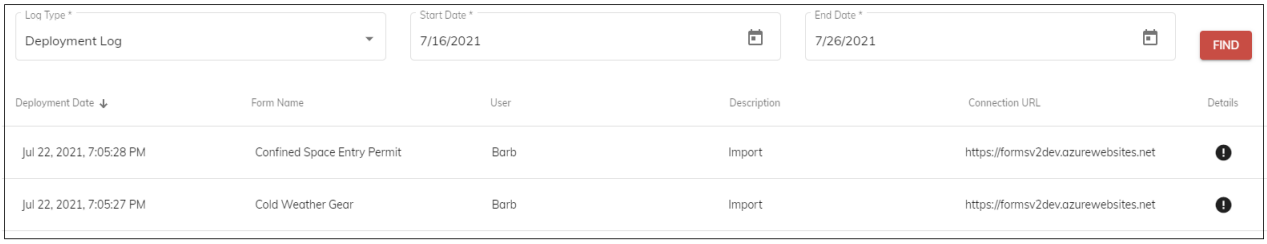


2. Select the form you want to view change information for or leave this blank to see changes for all forms for a date range.
3. Enter a start and end date.
4. Click **Find**.
5. The details for each change are displayed along with the Date, Version, and User who made each change.

DEPLOYMENT LOG

The Deployment Log displays all the details of the form deployment, including the date/time of deployment and what connection the deployment was from.

1. Click **Event Logs** from the left menu and select **Deployment Log** from the Log Type drop-down list.



2. Enter a start and end date.
3. Click **Find**.
4. The deployment date, form name, user, description, connection URL and details for the deployment are displayed.

PENDING FORMS

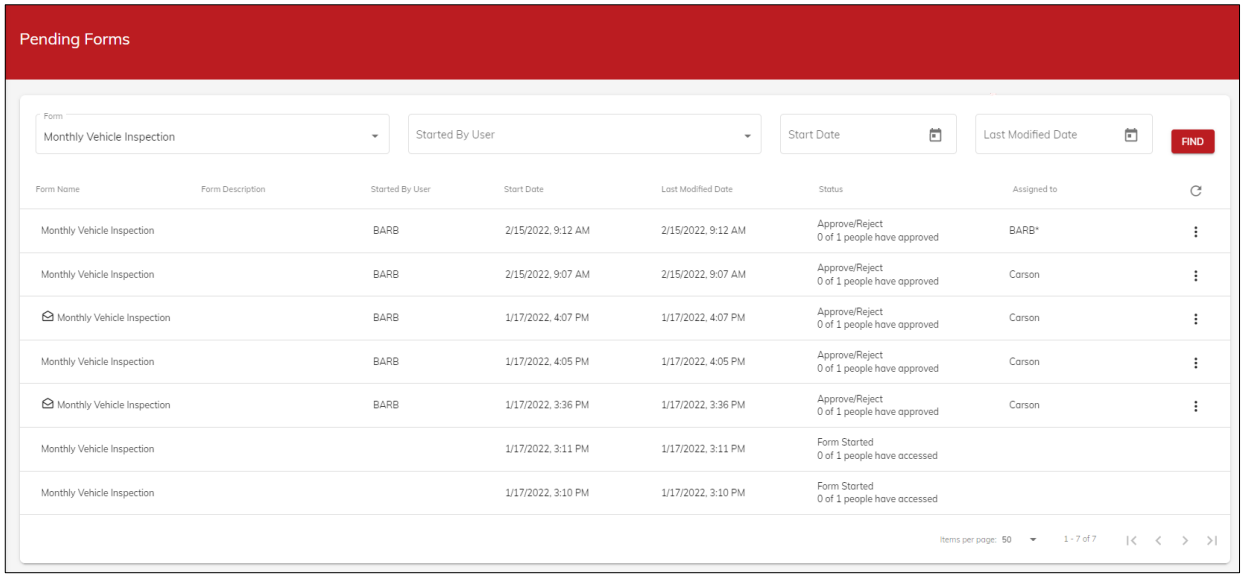
The Pending Forms page lists all forms at the current step of a workflow and are waiting at a step for action or are part of an incomplete envelope.

Forms that are completely through a workflow do not appear here – you can find them in the View/Edit Submissions page. Use the advanced search options (by form, user, start and modified dates) at the top of the page to sort the forms to help find a specific form.

An envelope icon next to the form name indicates the form is in a pending workflow and in an envelope.

Personal data that's deleted is removed from this page and the device it's saved on.

1. From the **Submissions and Logs** menu, select **Pending Forms**. The Pending Forms page opens.



An asterisk in the Assigned To column appears next to the name of the person who has the form checked out.

2. Click ⋮ (More) at the right of the form and select the action you want to take:

View Details – Opens the Workflow Details window and shows additional details about the workflow and form such as the date the form was checked out.

View Comments – Opens the Workflow Comments window and shows a running list of all comments entered in the Workflow Actions section of the form.

View Audit Trail – Opens the Workflow Audit Trail window and shows details for all steps thus far in the workflow.

View Envelope Details – Opens the Envelope Details window and shows details of the envelope the form is associated with if the form is an envelope.

Re-assign – Opens the Re-assign Workflow Item window and provides the ability to reassign a form in a workflow to another user. If the form is checked out, you will need to remove the form from that user, then assign it to someone else.

Cancel Workflow – Removes a form from the workflow. The form will be available in View/Edit Submissions.

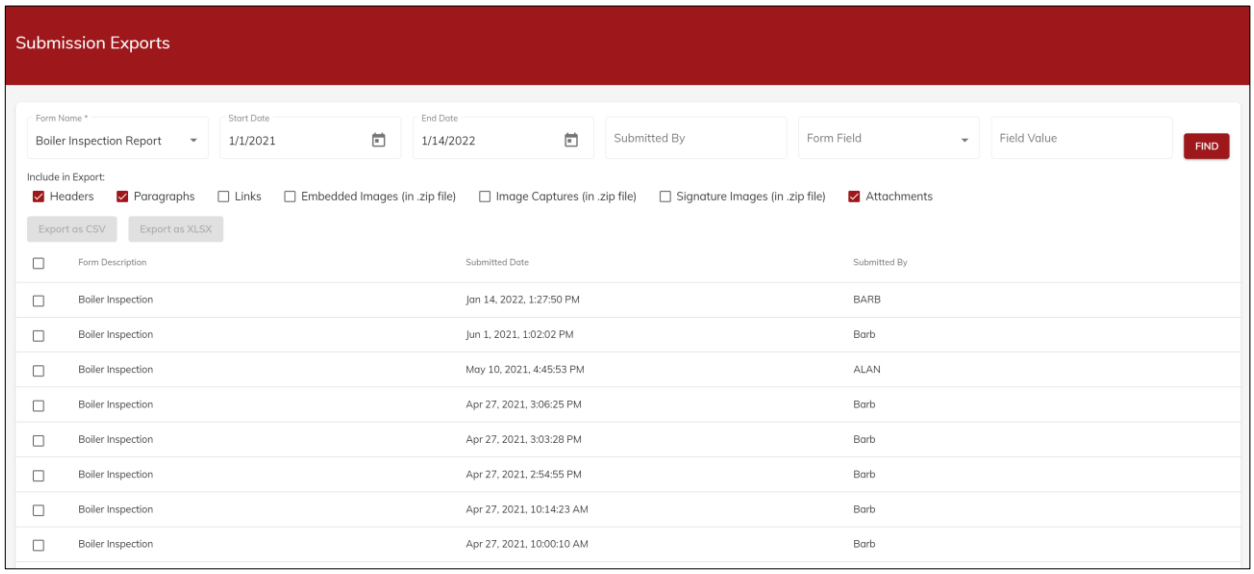
Remove Checkout – Removes the checkout from a user. This is useful if a user is offline and has a form for an extended period and is holding up the workflow.

Delete Pending Form – Opens the Confirm Delete window, where you can enter a reason for the deletion.

SUBMISSION EXPORTS

Data entered in a submitted form from the app can be exported to a CSV or XLSX file. The information included in the export is all the inputs entered and the options selected on the submitted form. It is not a report of the information formatted neatly. You can use data in exported forms to update external programs or sort it in other ways to see the data from several forms for analysis. How you want to rearrange and use the data is up to you.

1. From the **Submissions and Logs** menu, select **Submission Exports**. The Submission Exports page opens.



2. Select the form name and to limit the data retrieved enter a date range. If you want to further limit the submissions by a particular piece of data on the form, select a form field, then enter the corresponding entry you're looking for, then click **Find**.

3. Select what you want to include in the export: Headers, Paragraphs, Links, Embedded Images, Image Captures, and Signature Images. These fields are excluded as a default because all, but image captures and signatures aren't data entry information that will be valuable in a spreadsheet.

   NOTE If you select to include embedded images, image captures or signature images, the export will be in a zip file that contains the CSV or XLSX file and the image file.

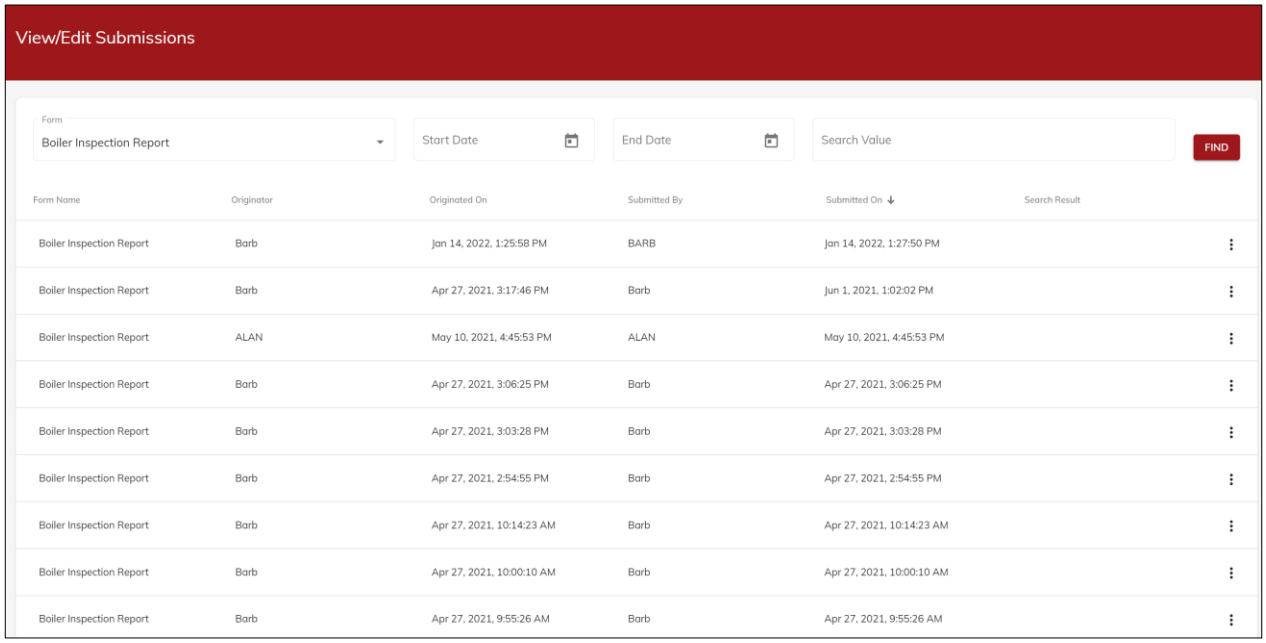
4. Select the forms you want to include in the export. Depending on the browser you are using, you can open or save the file.

5. Click the button for exporting to the file type you want to use: Export as CSV or Export as XLSX. All forms in the list are exported to that file. If you have a very large list of forms, or if there are many images, it may take a few moments for the import to complete. If you have tables on the form, they will be displayed in separate tabs on the XLSX spreadsheet.
6. From there, the data from the forms can be reorganized as needed.

VIEW/EDIT SUBMISSIONS

1. From the **Submissions and Logs** menu, select **View/Edit Submissions**. The View/Edit Submissions page opens.
2. Select the form name and a date range and click **Find**. This restricts the number of forms that are available to just those that meet the search requirements to help you find the form you're looking for more easily. You can also click Find with no search parameters for all forms. Once the forms are displayed, you can click the headings to change the sort order.

   To search for a field value across many form submissions, enter a search value. For example, if you want to find all the forms submitted for a particular customer, enter the customer name in the Search Value field and click Find. You can reduce the number of returns by entering a date or form name as well.



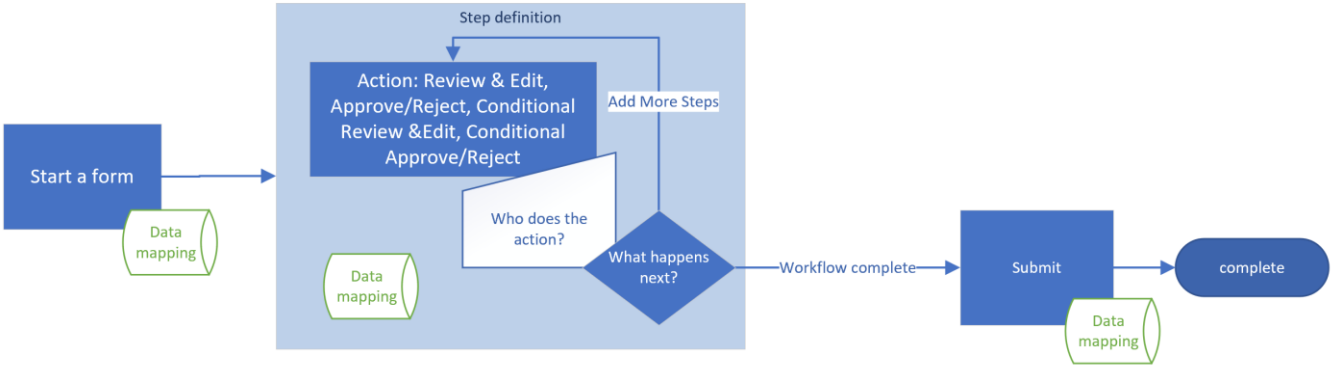
3. Click ⋮ (More) at the right of the form and select the action you want to take:
   - **Edit Submission** – Opens the Edit Submitted Form window, where you can make changes to the information submitted on the form. Images and signatures cannot be edited or added on a previously submitted form. If the form contains dynamic fields, the original entries/selections from the dynamic fields are retained. Data is not re-associated with the administrator user.

     Click **Submit** if you've made changes or close the window to cancel. When you click Submit on an edited form, only the actions at the very last step of any applied workflow will take place. If a report or email is defined for the form, those will be re-created and sent; and any defined integrations also will run.

- **View Report** – Select the report from the submenu and the PDF report created when the form was submitted will open. You can take actions available in the PDF viewer you're using, such as save, print or download.
- **View Revisions** – Opens a View Revisions pop-up window where you can select from a list of revisions made during the workflow. If no workflow is on the form, you will see only the submissions. Select the revision you want to view from the list, and a View Revision pop-up window opens where you can view the form at that step in the workflow.
- **Delete Submission** – Opens a Confirm Delete pop-up window where you can enter a reason for the for deletion.

WORKFLOW

A workflow is a series of review and approval steps added to a form. The workflow you define applies only to the form you're working with. Your workflows can be as simple or as complex as your business requires. Essentially, FormsPro workflow looks like the following:

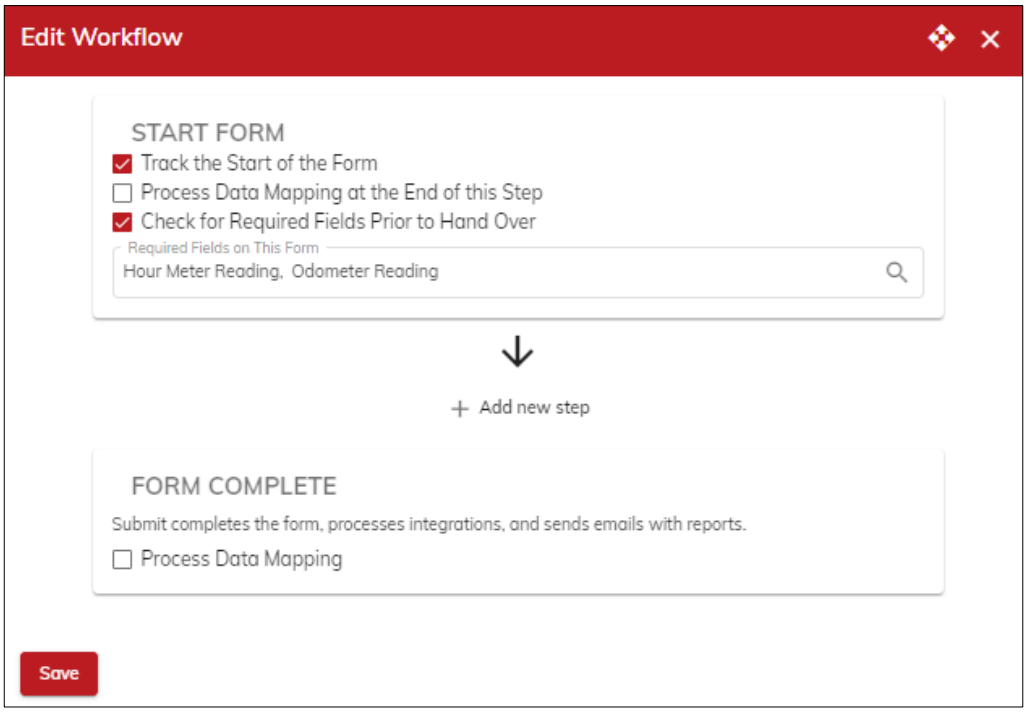


The flexibility comes in at the step definition. The number of steps you add, along with the options you choose for each step adds more and more functionality to your workflow.

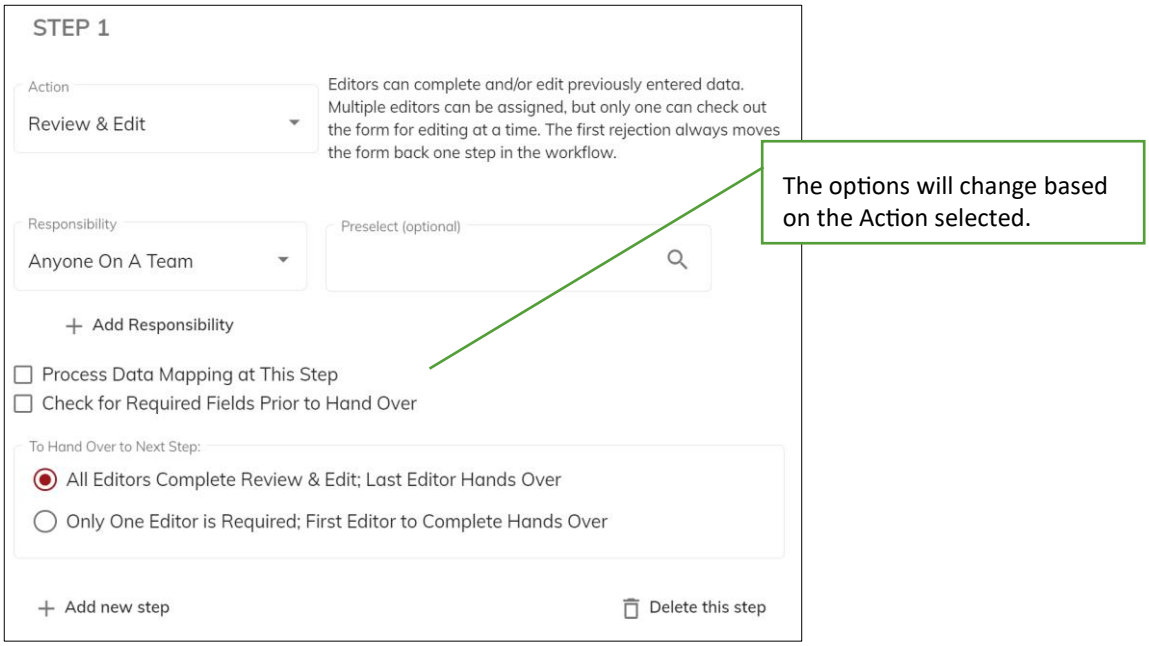
Before you start adding a workflow to a form, be sure the users and teams who will be using the workflow are set up. It may also be helpful to have a basic flowchart sketch of your workflow handy to help you set up each step.

If your form is already published and in use, you may want to consider unpublishing the form until your workflow setup is complete. Forms begin going through a workflow once the workflow is saved and the form is published. A copy of your form can be used in the meantime for use in the app if your circumstances allow.

1. From the **Form and Report Designer** menu, select the form to which you're adding a workflow.
2. Click (Workflow) to open the Edit Workflow window. You will see two steps already listed in the window: Start Form and Form Complete. All workflow steps are added between these two steps.
   - **Track the Start of the Form**: Inserts a record in the Pending Forms page in the Admin site so that an administrator can see that this form has begun. This is more useful for incident forms that you need to be aware of, and less so for forms like timesheets.
   - **Process Data Mapping at the End of This Step**: Starts the process of mapping your data according to the data mapping set up for the form. Each individual step with data mapping will create a revision record in the mapped data.
   - **Check for Required Fields Prior to Hand Over**: When selected a **Required Fields on this Form** multi-select list appears, where you can mark which fields you want to be required in the workflow.



3. After selecting the options you want at the start of a form, click **Add New Step** to add a step to the workflow.



4. Select the action the users in the workflow will ultimately take for the step. The options are as follows, with text on the workflow to help you make decisions about each action:

Action	Description
Approve/Reject	Users at this step are not allowed to edit the entries on a form. Their role is to simply approve or reject the form at this point and move it to the next or back one step.

Review & Edit	All editors at this step can complete and/or edit previously entered data on the form. Multiple people can be assigned to the step, but only one can edit at a time. When another person is editing, the remaining editors can review the entries to date. Rejections are allowed, which move the form back one step for clarification or additional information.
Conditional Approve/Reject	Conditional Approve/Reject will branch the workflow based on conditions in the form. The conditional steps occur only when the condition is met. Otherwise, the Approve or Reject is the same as the non-conditional Approve/Reject.
Conditional Review & Edit	Conditional workflow steps can be added to branch the workflow as needed based on conditions in the form. The conditional steps occur only when the condition is met. Other than meeting or skipping according to the condition, Conditional Review & Edit functions the same as a non-conditional Review & Edit.

5. Select the Responsibility for the action on the step. This helps determine who needs to take an action on the form. When you select a responsibility, you can pre-select information here that will help limit the choices available on the mobile app for selecting the responsible people. The person responsible for the workflow step will receive a notification on their device when it's their turn to take action on the form. The form will appear in their Assigned list until action requested in the workflow has completed. You can add multiple responsibilities (even for the same type) so that everyone who needs to take an action is able to.

Responsibility	**If you preselect in the designer…**	**…this is the result in the app**
Any Team Lead/Secondary	Select one team, and the lead assigned to the team will get the form to take action on at this step. Teams that don't have a lead assigned will not appear in the list. This works well for a form that is used by a specific team.	The user can select the lead (primary or secondary) of the team. The search will be limited to the leads of the preselected team.
	You can also select multiple teams, and the form user will select the lead from those teams. This works well for a form that's used by multiple teams in your organization – each app user can select the team they are on to send it to their lead.	The users will select the primary lead or secondary lead. The search will be limited to the leads of the preselected teams.
	Leave blank to allow the user on the app to select the team lead during form entry. This works well for a form that's widely used by your organization.	The user can select any user who is a primary lead or secondary lead on any team.
Anyone on a Team	Select one team, and the user will select the member of the team to send the form to. This is useful when a form needs approval by an individual of a team who may not be the lead of a team. For example, a regional director would need to take the action, and the form user chooses the director of the region they're part of.	The user can select any team member. The search will be limited to the members of the preselected team.

	Select multiple teams and the user will select the team member from the teams selected.	The user can select any team member from the preselected teams.
	Leave blank to select a user from any team.	The user can select any user assigned to any team. The search is limited to users assigned to a team.
Specific User	Select a user the form will go to at the step in the workflow. The app user will not be able to change it.	The user selected in the Designer is assigned the form at the workflow step and can't be changed.
	Leave blank to allow for any user to complete the workflow step.	The user must be selected to take the action on the workflow step.
Whole Team	Select one team and the form will be assigned to all team members of that specific team. You can use this as a method of distributing a started form to the technicians on a team – be sure to assign the action as Review & Edit if they will need to complete parts of the form.	All members of the team selected in the Designer will be assigned the form at the form step and can't be changed.
	Select multiple teams and the user will select one of the teams on the form.	The user can select any preselected team; the search will be restricted to the preselected teams. The form will be assigned to all members of the team the user selects.
	Leave blank to allow for any team to be selected from the app.	The user can select any team that has been set up. The members of that Team will be assigned the form.
Submitter's Team Lead	Option does not exist for this setting.	If the user is on one team the primary lead appears and cannot be changed. Changes can be made in Pending Forms if needed. If the user is on more than one team the lookup displays the primary leads for the teams the user is a member of. If the user is not on a team the field lists all the team leads and the user needs to choose one to submit.

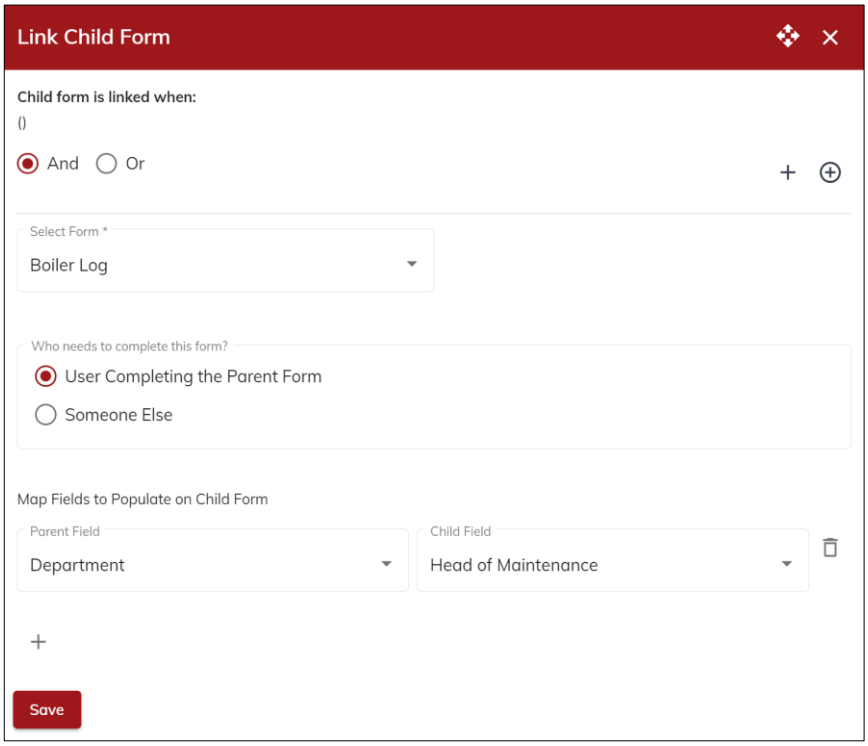
6. Mark **Process Data Mapping at This Step** if you want to create a revision of your data map when the form is handed over to the next step. This allows you to track the changes at a data level that were made at each step of the workflow.
7. Mark **Check for Required Fields Prior to Hand Over** if you want to specify the fields that are required before handing over to the next step. This option is only available if the action is Review & Edit.
8. Select a Hand Over option which will move the form to the next step based on whether everyone assigned needs to take an action, or if only one person taking an action will move the workflow forward.
9. If the Action is Approve/Reject or Conditional Approve/Reject, you can choose what will happen if the form is rejected – to continue using the form and send it back one step for revisions; or to end the workflow because the whole process is then rejected and there's no need to continue with the form. A form with a discontinued workflow will be available in the View/Edit Submissions list.
10. When complete, click **Save**.

LINKED FORMS

Forms can be conditionally linked so that when one form is completed and submitted, a second “child” form is started. Fields from the first “parent” form can be mapped to the child form so that the entries remain the same on both forms. Multiple child forms can be linked, and child forms can become a parent to another form as well.

The person who needs to complete the child form can be pre-determined when linking the form or set as the first form is completed if your processes are more varied. The same person can also complete both forms. Forms are linked on the parent form – which is the form with the condition that drives the start of the child form. Before you link forms, they should be as complete as possible.

1. Click (Link Child Form) and select **Link a Child Form** from the menu.



2. Enter the condition that must be met for the child form to start at the submission of the parent form. You can base this on any field in the form. If the child form must always be completed, you can base the condition on a field in the form for just this purpose that you can leave off of a report, such as a radio button input named Start Child Form with one option set to default marked.
3. Select the form which will start based on the condition. This is the child form.
4. Select the options for who needs to complete the child form:

   User Completing the Parent Form – use this option when the same person completes both forms. This useful when additional unexpected work is needed for a work order, and only one technician is dispatched to the work order.

   Someone Else – use this option to assign the child form to another user. You can decide to choose Assign Now whether the child form is sent to a specific person, such as a sales coordinator if a quote is necessary; or to have the parent form user decide when they submit the form.

5. Map the fields on the two forms if you want the data from the parent form to fill fields on the child form. Mapping is optional. You will only be able to map fields of the same type to each other. For example, you can't map a date field to a text field.
6. Click **Save**. The next time the parent form is submitted, and the condition is met, the person who will be receiving the child form will receive a notification that a form is assigned, and will be able to start the form from the Saved/Received tab on the app.

EMAIL

Forms can be emailed to users within your organization or externally when they are submitted. However, before they can be sent, the email must be set up with the information from the form you want to send. Email settings apply to each form independently. The email functionality does not integrate with your organization's email application.

Each form created automatically saves a default email. This is the email that is sent to the mobile user when they submit the form if they opt to email themselves. It also does not show the form name on the mobile app. Even if you aren't interested in setting up multiple emails, you should open the default email and enter a subject and select the report or reports you want to attach to the email.

You do not need to be using multiple emails to use email rules or app settings, to understand those features see below. Just remember, these can be applied to the default email.

EDIT THE DEFAULT EMAIL SETTINGS

1. In the Form Designer, click (Emails) then, select the default email.
2. Enter an email address in the **Email Form to** field. Use a comma or semicolon separator between multiple addresses. You can enter group email boxes if they exist.

   TIP: If you want to send the form externally; for example, to a customer, you should not add their address here because every submission of this form will be emailed to that address. Only use an external email address if the form is specific to that person or organization. Additional email addresses can be added from the FormsPro app on the device when submitting the form.
3. Click the **Append Email Addresses from** lookup to include fields from the form as additional email addresses.
4. Mark the **User's Primary Team Lead** option to use the primary team lead's email address, for the person completing the form, to send the form.
5. Enter a subject that will appear in the Subject line of the recipient's email box. You can add inputs from the form you're working with by using the Add To Subject drop-down list. This puts the input field in the subject and when the form is emailed, the entry for that input appears in the subject.
6. Select the report(s) you want to send with this email. The default report will be marked automatically.

   If no report is selected, no form PDF will be sent with the email. You can use emails without reports as a simple means of notification.
7. Enter the body of the email. You can type in text as well as select Merge Fields from the form. If you want any information from the form to be included in the email, you must add that input to the body of the email.
8. Click **Save** when you've completed the set up.

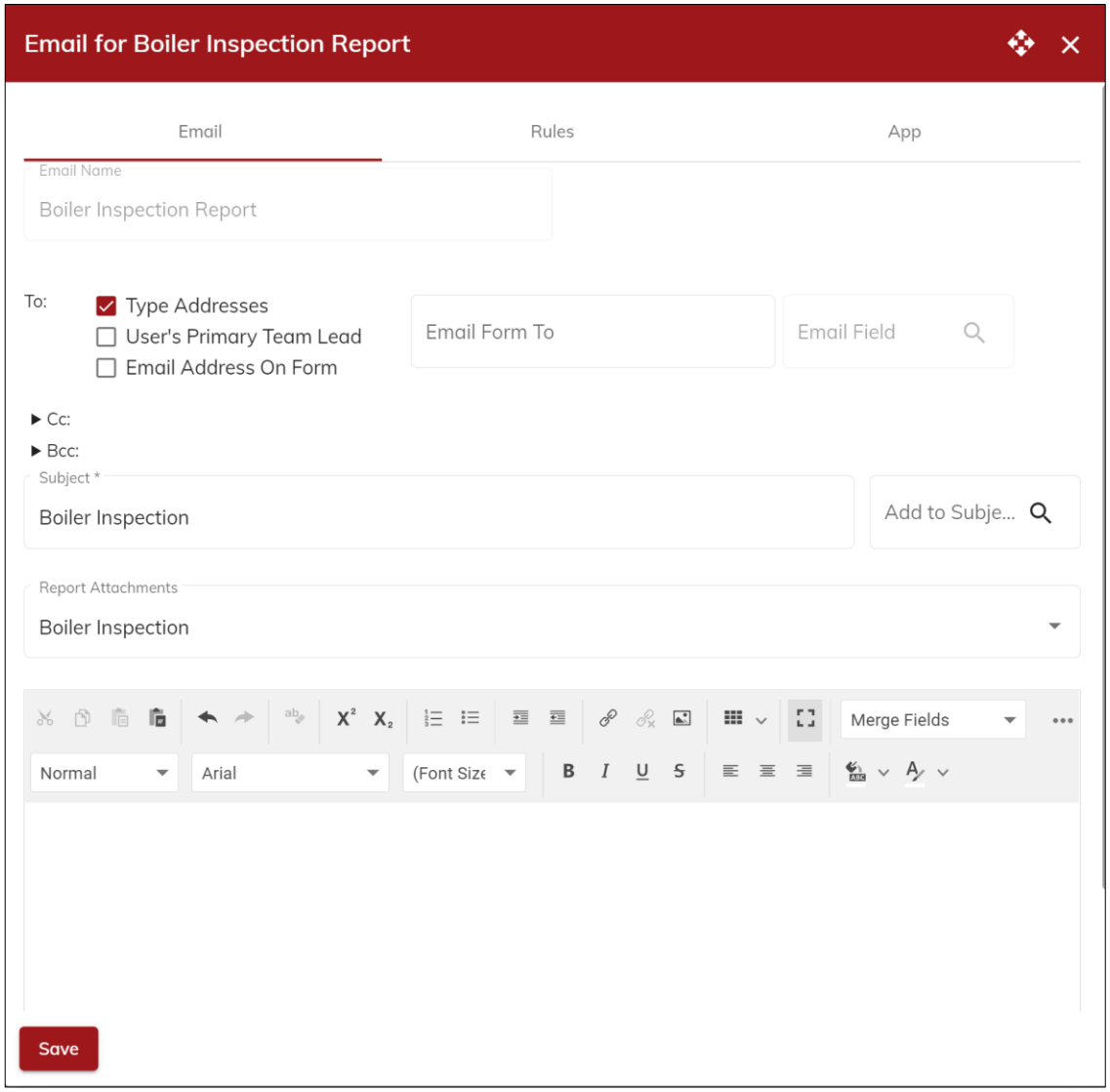
If you are using envelopes, the email set up for the envelope replaces the default email for the forms in the envelope.

CREATE AN ADDITIONAL EMAIL

Multiple emails can be created for each form, so that you can send emails with different text to the appropriate audience, as well as provide a method for sending different reports to the appropriate party.

Select the form you're setting up email for from the Created Forms list.

1. On the toolbar click (Emails) then, Create an Additional Email.



2. Enter a name for the email. The email name appears in the mobile app to help the app user determine if/when the email should be sent to any additional addresses besides those that are set up here.

3. Enter an email address for the people you want to email this form to. Use a comma or semicolon separator between multiple addresses. You can enter group email boxes as long as they exist.

   TIP: If you want to send the form externally; for example, to a customer, you should not add their address here because every submission of this form will be emailed to that address. Only use an external email address if the form is specific to that person or organization. Additional email addresses can be added from the FormsPro app on the device when submitting the form.

4. Enter a subject that will appear in the Subject line of the recipient's email box. You can add inputs from the form you're working with by using the Add To Subject drop-down list. This will place the input field in the subject and when the form is emailed, the entry for that input will appear in the subject.

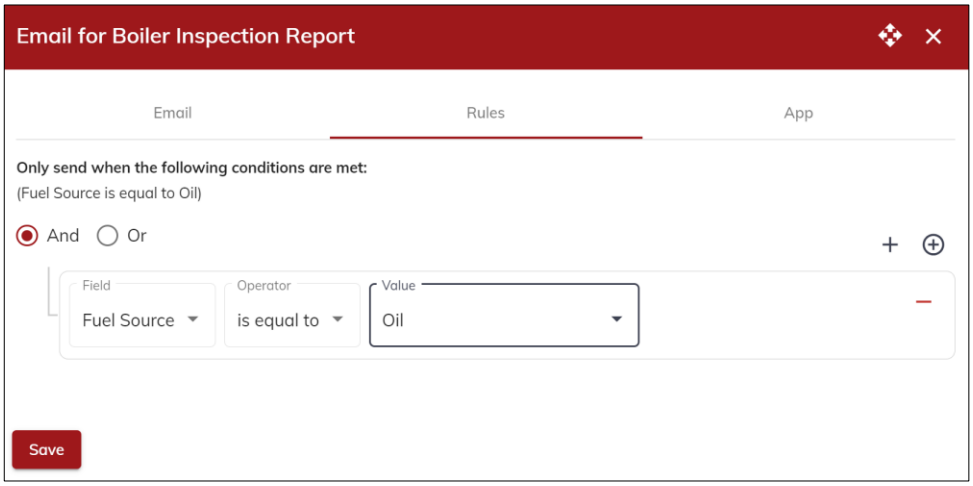
5. Select the report(s) you want to send with this email.

If no report is selected, no form PDF will be sent with the email. You can use emails without reports as a simple means of notification.

6. Enter the body of the email. You can type in text as well as select Merge Fields from the form. If you want any information from the form to be included in the email, you must add that input to the body of the email.
7. Click **Save** when you've completed the set up.

SET UP EMAIL RULES

You can create rules which are conditions that control when an email is sent based on the content in the form. For example, if you have a vehicle inspection form that you want sent to the mechanic shop only if a repair is required, you can do that using email rules. In the Email pop-up window, select Rules to open the Rules tab.



Email rules are like Conditional Fields inputs on the form. Click + (Add) and select the field from the form you want to use to drive the rule for the email. Then, enter the operator and value for the field. You can add as many conditions as needed to control your rule.

Click **Save** when your rule is complete.

APP SETTINGS FOR EACH EMAIL

Click the App tab in the Email pop-up window to change the mobile user options for each email.

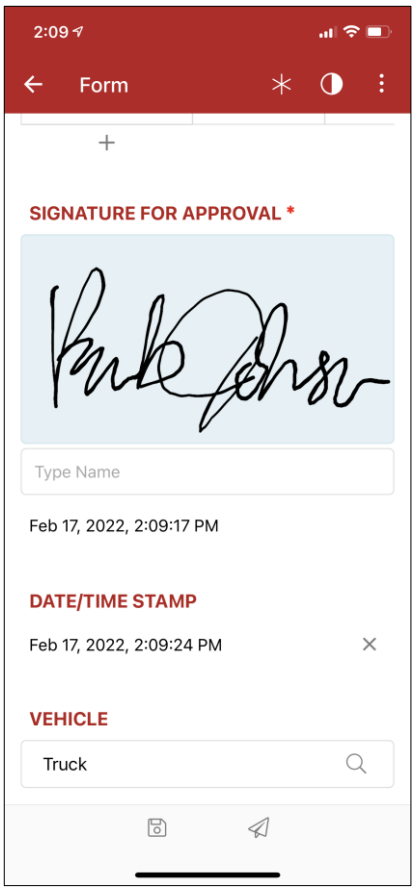
Hide Email Address Pane in App You can hide this email in the email pane at the bottom of the form in the mobile app if you do not want the app user to receive this email and report for the form or send it to anyone else. This is useful if there is data on the report that you want to keep secure and not distribute via email on the form to anyone outside of those entered in the Email tab. Keep in mind that if you select this, and no email addresses are entered in the Email Form To field on the Email tab, the email will not be sent.

TIP: If this is a form that needs to be individually sent to a customer, for example, you'll need to be sure this option is unmarked. Confidential data can be included on one report that can be emailed to specific recipients, and another report can be created excluding that data and emailed to the customer and mobile user.

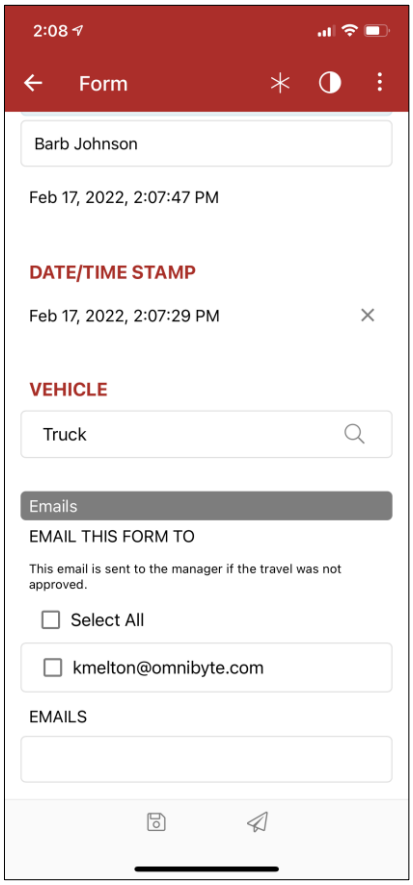
Description You can enter descriptive text about the email settings that will appear on the mobile app to help the mobile user understand what the email contains. This text does not appear anywhere besides the email pane in the app, so you can be as descriptive as necessary. For example, "This email is sent to the mechanic shop to notify them of an issue with the truck when a repair is needed."

The following shows how the mobile app displays the email options with these settings:

Hide Email Address Pane in App is marked



Hide Email Address Pane in App is not marked.



REPORTS

You can create forms that are easy to use on a mobile device, and reports that display that information in a completely different format.

BASIC REPORTS

Each form has a basic report that gets updated each time you save the form. The basic report contains the fields and responses on the form, in the same order as they are on the app, with very little formatting applied. The basic report will present you with the data submitted and is very practical if you have no need to present a form to a client or reporting agency. The basic report is always up to date with changes to your form – if you add or delete inputs, the basic report is updated as well. If you only use the basic report, the file name for the PDF file is the same as the form.

ADVANCED REPORTS

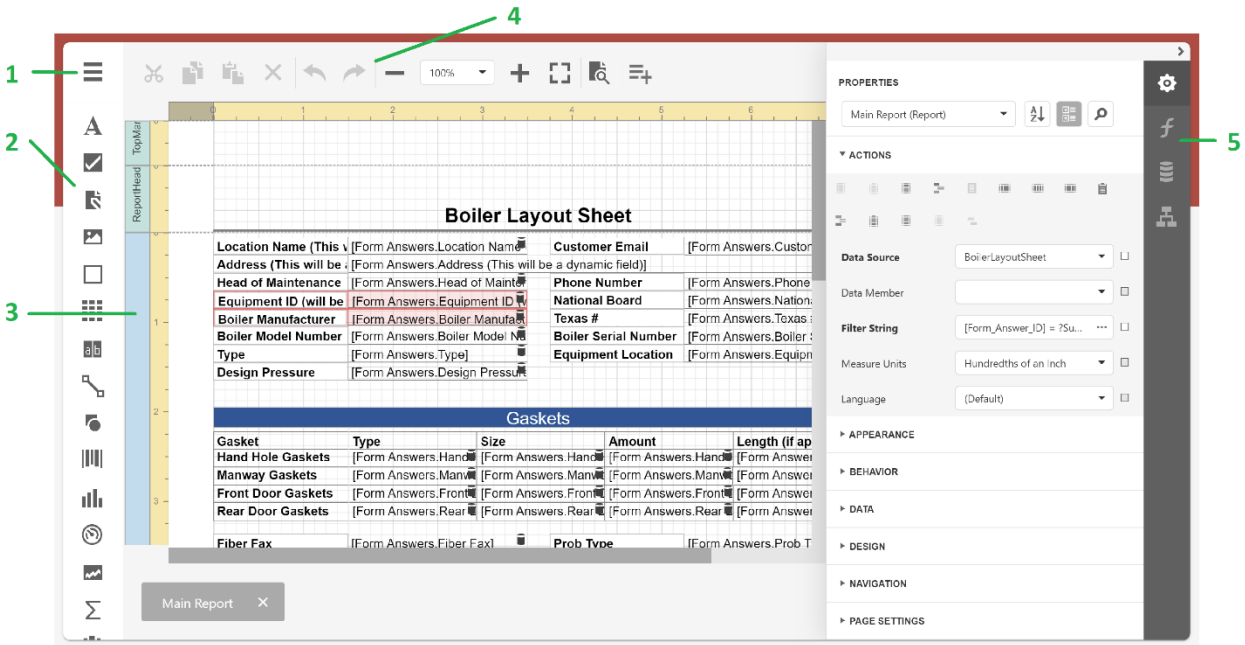
The basic report also provides a great starting point for advanced reports, if you find that you need more than the basic provides. With advanced reports, you can create multiple reports for each form and design and re-format the information presented in a more aesthetically pleasing way.

REPORT BUILDER

FormsPro report builder helps you create data-bound reports and provides a set of tools to construct report layouts to meet your requirements. This section provides more details about the report builder designer tools that are used in FormsPro. You may not need all the options available, because the modifications we've provided handle these options for you.

DESIGN SURFACE/LAYOUT

The Report Designer's design surface displays a report's structure and contents.

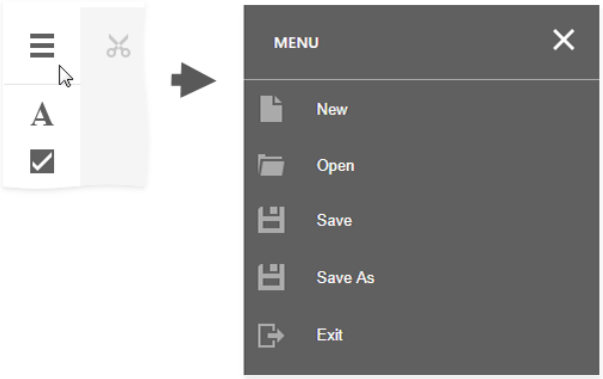


The Report Designer contains the following tools:

1. **Main Menu**: Manage reports and exit the report designer.
2. **Toolbox**: Drag report controls to the design surface.
3. **Report Bands**: Define the report controls' location on document pages.
4. **Main Toolbar**: Access report editing commands.
5. **Properties, Expressions, Field List and Report Explorer panel**: Set up report controls, create expressions, manage data sources, and view report structure.

MAIN MENU

The Main Menu is used to open an existing report, save a report, and exit the report designer. It is accessed from the upper left-hand corner.



We do not recommend using the New or Save As options in this menu.

- **New** creates a completely blank report that you will have to save then select the fields to add. It is easier to create a new report from the FormsPro form Report icon and create a new report which provides all the fields and sub-reports from your form or copy an existing report to use as a starting point. Refer to the Reports chapter in the user documentation for more information.
- **Save As** provides no functionality currently.

TOOLBOX

The Toolbox is located on the left-hand side of the design surface. It lists all available controls and allows you to add them to your report by dragging the item from the toolbox onto your report area.

FormsPro provides many of these controls automatically with your report, and you won't need to use most of these for most of your reporting needs, except for special circumstances.

	Adds a label to your report. FormsPro Tip: Use to add extra headers that you want printed that you don't have on your form, or if you accidently delete a label.
	Adds a checkbox to your report. From the Properties menu, set the checkbox's state: **Unchecked**, **Checked**, or **Indeterminate**.
	Adds the rich text control to your report to display formatted text. FormsPro Tip: Use when you have extra instructions for reading a report that aren't needed for the completing of a form. You can add rich text to your report.

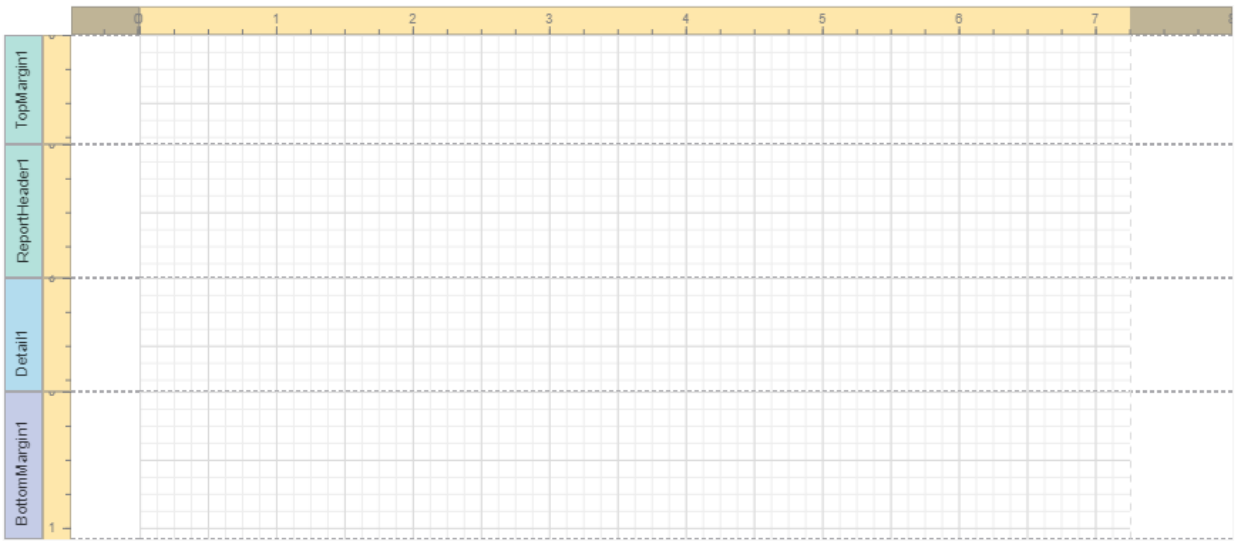
	Adds a picture box to your report to display images. From the Properties menu, Actions category, use the Image Source or Image URL property to specify the image to display in the picture box. FormsPro Tip: Use this only to add a static image to the report, such as a logo or special certification icon. The image you add is displayed on every report. If you need to add an image field from your form, use the Add Field button from the main toolbar, which creates the sub-report and bands needed to display images captured on the form.
	Adds a panel to your report. The panel control is a container that frames separate report controls and allows you to move, copy, and paste them to keep them together.
	Adds a table to your report. FormsPro Tip: You can add a table over your existing tables to assist with the dynamic growth of rows based on longer fields.
	Adds a character comb to your report. The character comb control displays text so that each character is printed in an individual cell.
	Adds a line to your report. The line control draws a line in a specified direction, style, width, and color. Use it to decorate and visually separate report sections.
	Adds a shape to your report. From the Properties menu, Actions category, use the Shape property to select the shape type to add to the report.
	Adds a barcode to your report.
	Adds a chart to your report.
	Adds a gauge to your report. The gauge control allows you to embed graphical gauges into your report. From the Properties menu, Actions category, set up a gauge's appearance.
	Adds a sparkline to your report. The sparkline control illustrates the data flow for every row in a report.
	Adds a pivot grid to your report. A pivot grid summarizes large amounts of data that can be sorted, grouped, and filtered.
	Adds a sub-report to your report. The sub-report control is used to embed other reports into the current report.
	Renders PDF content in your report. From the Properties menu, Actions category, specify the source or source URL for the pdf content. The pdf content is provided on separate pages and uses its own page settings.

	Adds a visual signature to a report exported to PDF.
	Adds a table of contents to your report header. If the report does not contain a report header, it is created automatically so that the table of contents can be added to it.
	Adds page information to your report. From the Properties menu, Actions category, defined the type of page information to display, such as date, time, page numbers and username.
	Inserts a page break in your report.
	Adds a cross-band line to your report. Use this control to highlight a report area that consists of different bands. FormsPro Tip: Use the Add Fields button in the main toolbar to add sub-reports. These create all the bands automatically for you.
	Adds a cross-band box to your report. Use this control to encompass a report section that includes multiple band areas.

REPORT BANDS

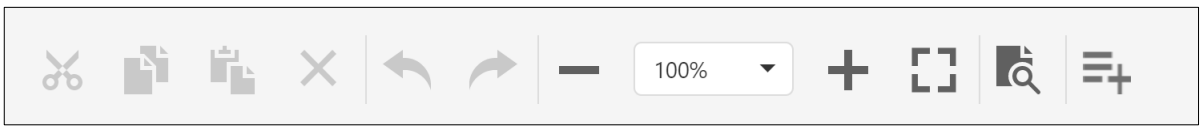
Reports are built from controls (text labels, images, tables, etc.) that are spread across report sections called report bands. Report bands define the report controls' location on document pages. The following report bands are provided when a report is created in FormsPro:

- **Top Margin Band**: Used to display supplementary information, such as page numbers, current date/time. This band is repeated in the top margin of every report page.
- **Report Header Band**: Displays introductory information, such as the report name, or company logo. This band is located at the beginning of a report.
- **Detail Band**: Displays recurring content from the report's data source. This band prints as many times as there are records available in a data source. Every report must have a detail band and it cannot be deleted.
- **Bottom Margin Band**: Used to display supplementary information, such as page numbers, current date/time. This band is repeated in the bottom margin of every report page.



MAIN TOOLBAR

The Main Toolbar is located across the top of the design surface and provides access to report editing commands in the report designer.



The Main Toolbar includes the following editing commands:

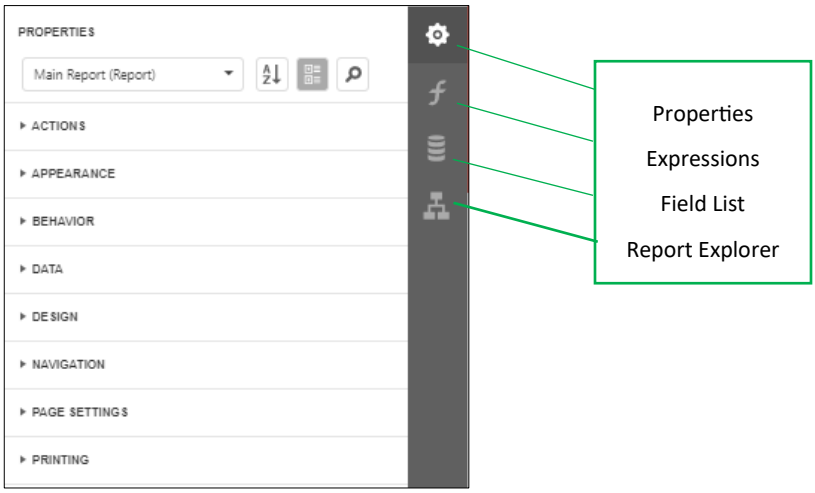
	Cuts the selected report element to the clipboard.
	Copies the selected report element to the clipboard.
	Pastes the contents of the clipboard onto the selected report band.
	Deletes the selected control.
	Cancels the last change made to the report (undo).
	Reverses the results of the last undo action (redo).
	Decreases the current zoom factor by 5 percent (zoom out).
100%	Zooms to a specific zoom factor selected from the dropdown list.
	Increases the document's current zoom factor by 5 percent (zoom in).
	Toggles between the Report Designer's full screen and the default size.

	Toggles between a report's design and the Preview mode.
	Opens a list of the fields and tables on the form that you can add to the end of the report. **This is specific to FormsPro. It is not a report builder element.**

Options are enabled and disabled based on what you have selected in the designer, and whether you have selected a single or multiple elements.

PROPERTIES, EXPRESSIONS, FIELD LIST AND REPORT EXPLORER PANELS

The menu on the upper right-hand side gives you access to the Properties, Expressions, Field List, and Report Explorer panels.



PROPERTIES PANEL

The Properties panel is used to access and customize settings of a report and its elements. From the drop-down list at the top of the Properties panel, select the element for which you want to view its properties, or click an element on the report and click the button.

ACTIONS ICONS ON THE PROPERTY PANEL

The Actions icons are used to add new bands on a report, manage a table's elements and position report elements. Depending on the selected element, the actions will vary.

	Inserts top margin band. This action is disabled because the top margin band is provided for you.
	Inserts report header band.
	Inserts page header band.

	Inserts group header band.
	Inserts detail band. This action is disabled because the detail band is provided for you.
	Inserts vertical header band.
	Inserts vertical detail band.
	Inserts vertical total band.
	Inserts detail report band.
	Inserts group footer band.
	Inserts report footer band.
	Inserts page footer band.
	Inserts bottom margin band. This action is disabled because the bottom margin band is provided for you.
	Inserts sub-band.
	Aligns the selected element to the report grid.
	Sizes the selected element to the report grid.
	Centers an element horizontally.
	Centers an element vertically.
	Moves a selected element on top of other overlapping elements.
	Moves a selected element behind other overlapping elements.
	Fit bounds to container. Used in a panel. If a panel has only one element, this action resizes the element so that it occupies all the available space (excluding borders).

	Fit bounds to text. Adjusts the element's area to fit its text.
	Fit text to bounds. Adjusts the element's font size to fit its area.

PROPERTIES

Contains the element settings that can appear alphabetically or in categories based on their purpose. Use the buttons next to the selected element to switch between these display modes.

The following lists each of the properties in the report builder and how they are used in FormsPro. Depending on the selected element, the properties will vary. The following lists the properties alphabetically so you can easily search for each one.

Accessible Description	Specifies text that the screen reader reads. This is used when you export a report to PDF format.
Allow Markup Text	Indicates if you can use HTML style markup tags to format a report control's text.
Anchor Horizontally	Defines how to resize a report control to maintain the distance to the left and right edges of its container.
Anchor Vertically	Attaches the top and/or bottom edges of the report control to the edges of its container on a rendered document page.
Angle	Specifies an elements rotation angle. FormsPro Tip: Use this to turn labels in a table to read vertically.
Auto Width	Specifies whether column widths are automatically changed so that that the total column's width matches the grid's width.
Background Color	Specifies the background color for the selected element.
Bookmark	Sets the report element as a bookmark.
Bookmark Duplicate Suppress	Specifies whether to suppress duplicated bookmarks in the final document.
Border Color	Specifies the border color for the selected element.
Border Dash Style	Specifies the border dash style for the selected element.
Border Width	Specifies the border width for the selected element.
Borders	Sets the border of a cell, such as top, bottom, left or right.

Can Grow	Indicates that the element's height can be automatically increased to display the entire content. Any other report elements below the control are moved down to prevent overlapping.
Can Publish	Indicates whether a report control is displayed in a printed or exported document.
Can Shrink	Indicates that the element's height can be automatically decreased if the contents do not completely fill the control.
Cross Band Controls	Provides access to a collection of cross-band controls in the report.
Data Member	Specifies the list in the report's data source.
Data Source	An object that provides an API for processing data.
Display Name	Sets the report's display name.
Draw Grid	Sets a value indicating whether to draw the snap grid over the report surface.
Draw the Watermark	Sets a value indicating whether to draw a watermark at design time.
Edit Options	Specifies whether and how a control's content can be edited in Print Preview: • **Enabled**: Indicates whether editing a control's content in Print Preview is enabled. • **ID**: Indicates the unique identifier of edit options. • **Read Only**: Indicates whether an editor for customizing a control's content in Print Preview is enabled. • **Editor Name**: Internal to OmniByte use.
Export Options	Specifies exporting parameters when exporting a report.
Extensions	Used to serialize custom objects.
Filter String	Specifies the criteria used to filter data in a report.
Font	Specifies the font name, size, and unit for the selected element. You can also make the font bold, italic, underline, or strikethrough.
Foreground Color	Specifies the foreground color for the selected element. FormsPro Tip: Use this to change the color of text.
Horizontal Content Splitting	Indicates whether the content is split across pages or moved to a new page.

Image Resources	Provides access to a collection of the report's named images.
Interactive Sorting	Enables sorting a report in Print Preview. • **Target Band**: Specifies the band for which sorting in Print Preview is enabled. • **Field Name**: Specifies the name of a field that is used to sort data in Print Preview.
Keep Together	Indicates whether a report control can be horizontally split across pages. FormsPro Tip: Select a row in a static table on your report, then select this box to prevent the information in the row from splitting across page breaks. For best results, apply to one row at a time. Depending on the fluidity of the data above the table and in the table, you may need to experiment with a few submissions to ensure this is applied in the right places. Use a page break to keep a whole table on a page. You can also use this to prevent a long text field from splitting across pages.
Landscape	Indicates whether the page orientation is landscape.
Language	Specifies the language used in the report.
Location	Internal to OmniByte use.
Margin	Sets the report's page margins.
Measure Units	Specifies a unit of measurement for various distance values of a spreadsheet.
Multi-Column Options	Specifies that each page of the report is laid out in a specified number of columns.
Multiline	Indicates whether more than one row of tab headers is displayed.
Name	Displays the name of the control.
Navigation Target	Sets the frame that manages navigation invoked by the current element.
Navigation URL	Specifies the URL to navigate to when a control is clicked.
Null Value Text	Internal to OmniByte use.

Padding	Specifies the amount of internal space between the body of rectangular UI element and its borders. You can apply it to All, Left, Right, Top, or Bottom. FormsPro Tip: Add padding to the top of fields when you have the text aligned to Top, it adds just a little spacing to separate it from the lines if you're boxing in the text. Default padding is set to 2 for right and left, and 0 for top and bottom.
Page Break drop-down list	Specifies where to make a page break in the band: • **None**: No page breaks are inserted before or after the current band. • **Before Band**: Inserts a page break before the band. • **Before Band Except First Entry**: Inserts a page break before the band except for the first entry. • **After Band**: Inserts a page break after the band. • **After Band Except Last Entry**: Inserts a page break after the band except for the last entry.
Page Color	Sets the fill color of the report pages.
Page Height	Sets the height of the report's pages.
Page Size	Sets the size of the report's pages.
Page Width	Sets the width of the report's pages.
Paper Kind	Select the kind of paper for printing. FormsPro Tip: When creating a report formatted as CSV choose Custom as the Paper Kind, then increase the page width to accommodate the columns of data on your report. This helps mostly in Preview mode to be sure your data layout is appropriate.
Parent Bookmark	Sets the report element whose bookmark is used as the parent for the current element's bookmark.
Printer Name	Specifies the name of the printer to use for printing the report.
Process Duplicates Mode	Internal to OmniByte use.
Process Duplicates Target	Internal to OmniByte use.
Process Null Values	Internal to OmniByte use.

Report Unit	Specifies the system of measurement used throughout a report for expressing the values of certain properties.
Request Parameters	Indicates if you want the document to be created after values for all visible parameters are set.
Right to Left	Specifies the content orientation of the controls.
Right to Left Layout	Specifies the position of controls within report bands
Roll Paper	Specifies whether the document is to be printed on roll paper (single uninterrupted page).
Show Margin Lines in Preview	Indicates to show page margin lines in the report preview window.
Size	Internal to OmniByte use.
Snap Grid Size	Specifies the dimensions of the report designer snap grid.
Sort Fields	Specifies the data fields which the data in the report's data source will be sorted by when creating the report's document and the order of sorting. Click the Add button to create an item sort. From the Sort By drop down list, select the item to sort. Then click the Add button again to continue selecting items to sort. Mark **Keep Together with Detail Reports** option to print the sorted items on one page. Mark **Fill Empty Space** to populate the empty region below the detail band with copies of the band. The band retains its layout, but the report controls are printed without data.
Style Sheet	Provides access to a collection of styles in a report.
Styles	Retrieves a set of styles for the control, including Even Style, Odd Style, and Style.
Summary	**Running**: Sets a value for a report area for which an arithmetic function is calculated. • **None**: The function is not calculated. • **Group**: The function is calculated for every group. • **Report**: The function is calculated for the entire report. • **Page**: The function is calculated for every page. **Ignore Null Values**: Specifies whether null values should be ignored when a summary is calculated.

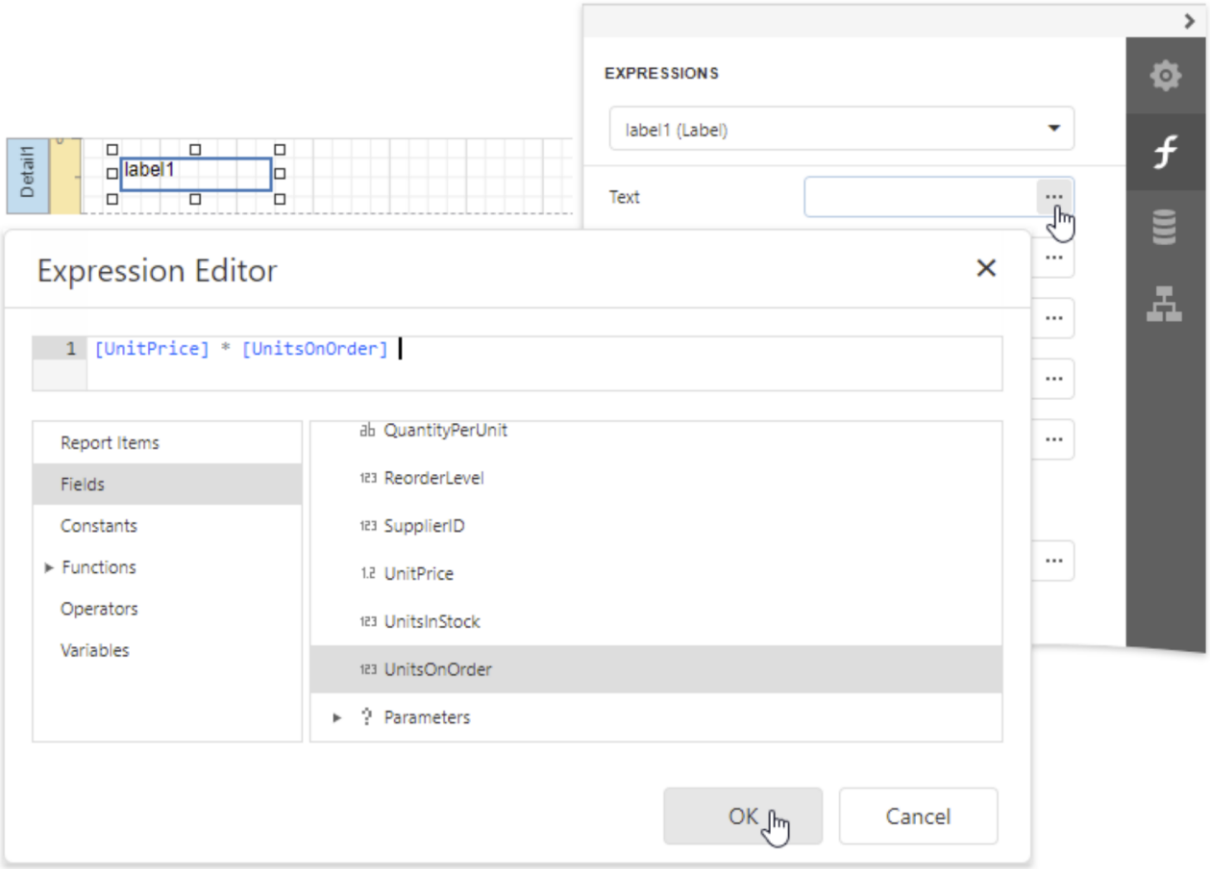
	Treat Strings As Numerics: Specifies whether a summary function should treat strings as numeric values.
Tag	Stores data that is closely associated with the report control.
Text	Specifies the control's text.
Text Alignment	Specify how the text associated with the control should be aligned.
Text Fit Mode	Specify how to change a control's text size to fit its boundaries: • **None**: The text size remains unchanged. • **Grow Only**: The text size is automatically increased to occupy the control's entire area. • **Shrink Only**: The text size is automatically decreased to be completely displayed in the control. • **Shrink and Grow**: The text size is automatically decreased or increased to fit the control's boundaries.
Text Format String	Applies formatting to report elements to display incoming data. For example, you could format a numeric value as currency. FormsPro Tip: For the most part, the formatting you apply to fields on the form apply on the report as well. You can use this setting to change it on the report, so that it's different than the form – for example, if you prefer a date formatted one way for all customer reports.
Text Trimming	Specifies how the characters in a string that do not completely fit in a layout shape are trimmed: • **None**: Specify no trimming. • **Character**: Specify that the text is trimmed to the nearest character. • **Word**: Specify that the text is trimmed to the nearest word. • **Ellipsis Character**: Specify that the text is trimmed to the nearest character, and an ellipsis is inserted at the end of a trimmed line. • **Ellipsis Word**: Specify that the text is trimmed to the nearest word, and an ellipsis is inserted at the end of a trimmed line. • **Ellipsis Path**: The center is removed from the trimmed lines and replaced by an ellipsis.
Vertical Content Splitting	Indicates whether report controls outside the right page margin should be split across pages or moved in their entirety to the next page.

Watermark	Provides access to a report's watermark settings. Settings include Foreground Color, Text Transparency, Text, Text Direction, Image Source, Image Transparency, Image Tiling, Image Alignment, Image View, Page Range and Show Behind.
Word Wrap	Indicates whether a control automatically wraps words to the beginning of the next line when necessary. FormsPro Tip: Use Word Wrap and Can Grow together to ensure your field expands to show data that falls to another line. In tables where you know your data is only going to consistently extend a couple lines, you can set the height of a row to accommodate the wrapping instead of using Can Grow.
Xlsx Format String	Specifies the native Excel format to be imported to the control's content after the report is exported to an Excel file.

EXPRESSIONS PANEL

Use the Expressions panel to assign values to various element properties. Click any property's ellipsis to invoke the Expression Editor, where you can specify custom expressions with available data fields. An expression is a string that, when parsed and processed, evaluates a value. Expressions can consist of column/field names, constants, operators, functions, and variables. When using column/field names, they must be wrapped with brackets.

Expressions in the report designer work like many other expression writers, if you have experience with those. For specific information on a particular function, internet searches may provide examples. Keep in mind the specific formatting needed for the functions within the Expression Editor, which may be slightly different than other editors you may have used.



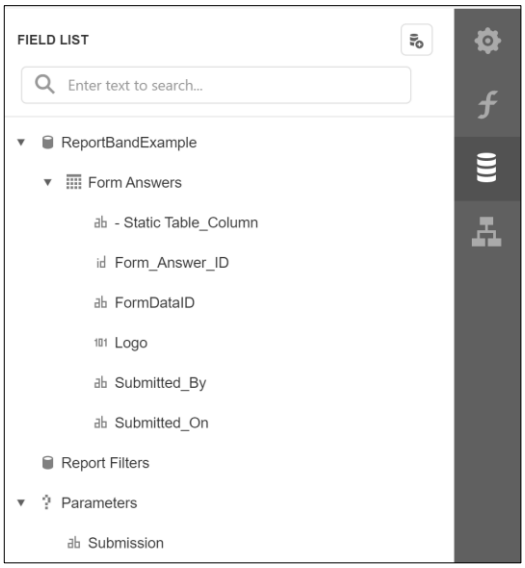
Let's say for example you want a "no" answer to appear red on a report. You could create an expression by completing the following:

1. Click on the FormAnswers field then click the Expressions icon (F) on the right-side.
2. Click the arrow next to Appearance to expand.
3. Click the 3 dots in the Foreground Color field.
4. Then enter the following expression. Change the Form Answers information for the specific field name (highlighted in yellow).

Iif([Form Answers.Are valves accessible - Inspection Check] == 'No','Red','Black')

FIELD LIST PANEL

The Field List allows you to manage report data sources and parameters, add calculated fields and create bound report controls.

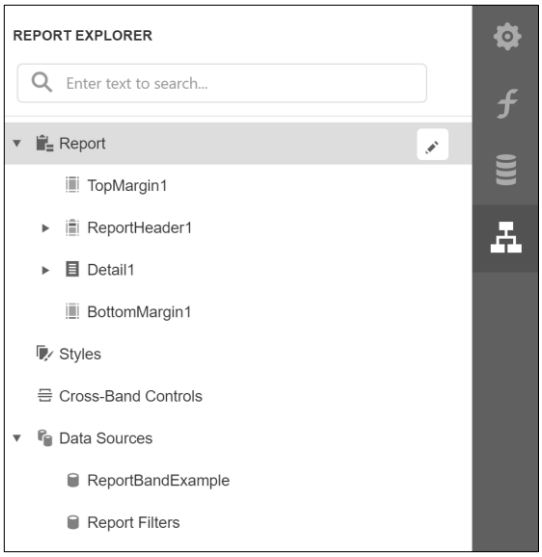


FormsPro Tip: Any information that is held in a sub-report is listed within the sub-report in the Form Answers. This includes conditional fields, images, and dynamic tables. Expand those areas to see the fields within the sub-reports.

You can drag fields from this list onto the report – for example, if you want to display the submitted date and user on the report, you'll find those fields in this list. Be sure to drag on a Label for those fields as well to help identify the data for the report user.

REPORT EXPLORER PANEL

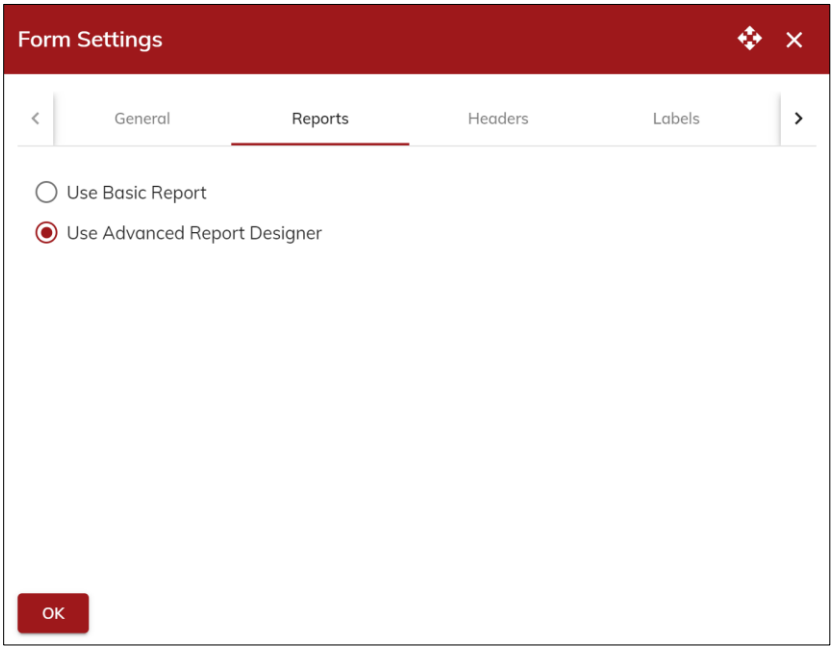
View a report's structure and provide access to report elements, styles, and data sources. The Report Explorer displays all report controls and bands in a tree form.



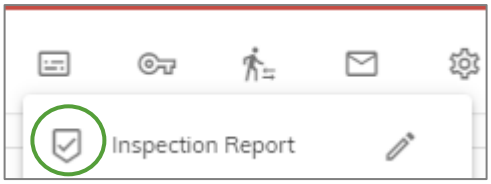
CREATING ADVANCED REPORTS

TIP: Create your advanced report after you're satisfied that the form you've created is complete and ready to publish. Unlike the basic report, the advanced reports don't get updated with changes to the form, so if you add more fields to the form, you'll need to add them individually to the report.

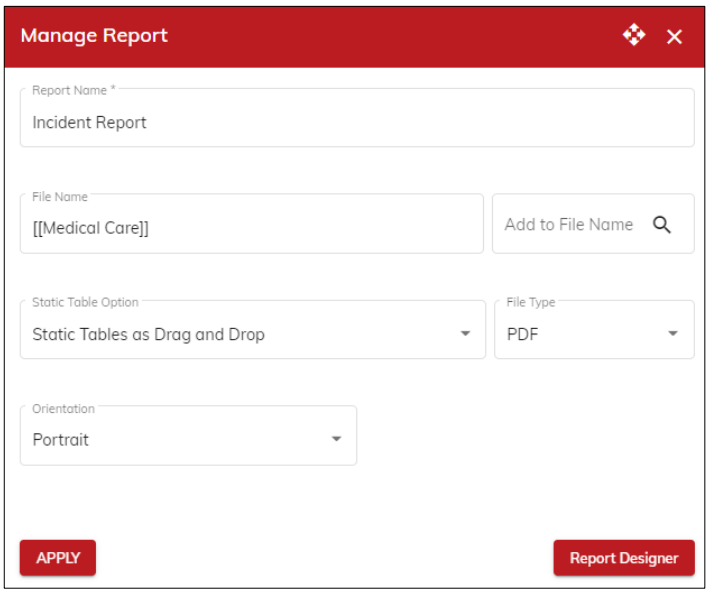
1. In the Form Designer, click (Default Settings) on the toolbar then click the Reports tab.



2. Select **Use Advanced Report Designer**.
3. Click **OK**.
4. Click (Reports) which is available after you've chosen to use the Advanced Report Designer. In the menu that opens, you can see the initial report is indicated with a Default Report icon:



5. Click (Edit) to open the Manage Report window and select options for the report.



The form name appears as a default in the **Report Name** field. You can change this to be more descriptive of the information on the report. This name appears only in the Form Designer pages in reports menus and in the View/Edit Submissions page.

6. Enter a file name for the report. This name identifies the report on email attachments and downloads. If you leave this blank, the form name is used instead. You can select fields from your form which inserts the entries from the submission at the end of the file name for help in identifying the report.

7. Select the static table option for formatting static tables on your report:

   - Static Tables as Drag and Drop – this option places the cells in a static table on the report, and you can find them in the Field list. The cells can be completely rearranged very easily by dragging and dropping wherever you want them on the report. New fields added can be brought onto the report in the same way as any other field.

   - Static Tables as Detail Band – this option places the cells in a detail band in a sub-report like dynamic tables. The fields can be rearranged, but only within the detail band.

8. Select a file type for the report. Reports can be saved as PDF, XLS, XLSX, CSV, or DOCX files. Each type is saved on a per-report basis and cannot be changed at the time of submitting. For example, if you have a report for which you need to export data out of a CSV file, you'll create a report specifically using that file type. If, for the same form, you want an attractive report to send to customers, you would create a second report using a PDF file type. Mobile app users won't be able to choose to send the report saved as a CSV file as a PDF when the form is submitted. If you have a form that needs a DOCX file attached or emailed, you can create an additional report as a copy.

   If you choose a type other than PDF, you will need to design your report with the output in mind. For example, reports created specifically for exporting purposes (CSV or Excel files) should be designed as one table of information. Keep header information in line with the columns of form data if that information needs to be included. If header information is formatted separately and outside of the main table of data, the data may not export from the file appropriately.

9. Select the page orientation for the report. The Report Designer opens using that orientation for the report and all sub-reports on it.

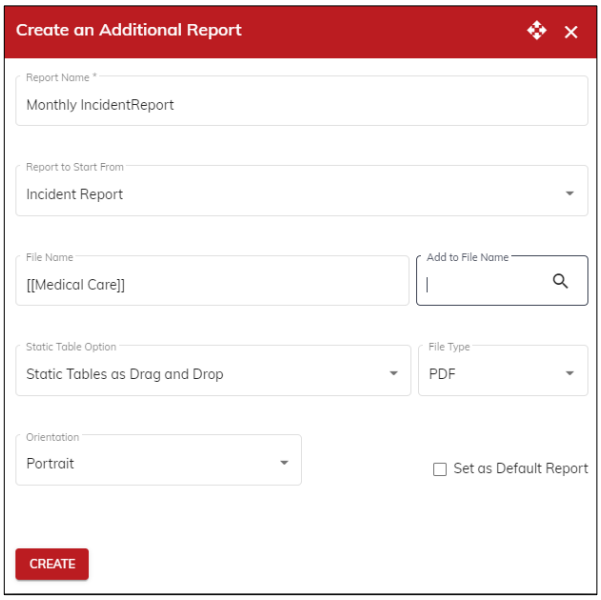
If you change the orientation after formatting the report, remember to go back into the designer to be sure your information and tables are lined up on the page. The data on the report is not moved if you change the orientation after saving.

10. Click **Apply**, then click **Report Designer**. The report will build and open in the Report Designer. Modify the fields on your report to match the layout you're looking for. See Report Formatting Tips in the following section for layout tips and tricks to help you format your results.
11. Click **Save** and then **Exit** to return to the Form Designer.

CREATE AN ADDITIONAL REPORT

If you need more than one report for a form, you can create additional reports that you either start from a basic report or from a copy of another report for this form.

1. Click (Reports), then select **Create an Additional Report**.



2. Enter information and make selections for the report:
   - To start the report from a basic report, choose **New Report**. This is the same as starting "from scratch" and is useful when you have a completely different report format for the subsequent report than you have for another report for this form.
   - To start the report from a copy of an existing report for this form, choose that report name. This is useful when you have a similar report but have some fields to remove or add to make it different than the original.
   - Mark **Set as Default Report** to set this report as the default. This option is available only for reports that are not the default.

   The remaining options are like those in the Manage Reports window described in the previous procedure.
3. Click **Create** and the Report Designer opens, and you can format your new report. The report builds based on your Report to Start From option and open in the Report Designer. Modify the fields on your report to match the layout you're looking for. See Report Formatting Tips in the following section for layout tips and tricks to help you format your results.
4. Be sure to update the email settings for the form to send the new report as needed.

EDIT AN EXISTING REPORT

Reports can be edited at any time, especially when you've made changes to the form. You can also edit some of the settings for a report using the Manage Report window.

To modify settings, click (Edit) on the report menu. Click Apply to save your settings.

Open the Report Designer from the Manage Report window, or by selecting the report from the Report menu.

Make your report formatting changes and save before you exit the Report Designer. If the form was published while you were making changes, the next time any users sync the updated report will be used.

CHANGE THE DEFAULT REPORT

You can use an additional report that you'd like to use as the default report rather than the original.

From the Reports menu, click Edit for the report you want to be the new default to open the Manage Report window.

Mark Set as Default Report and click Apply. This will reset the default to this report and remove the default from the previous default. The new default will now appear first in the Report menu and is indicated with the default icon.

DELETE A REPORT

A report can be deleted as long as it is not the default report.

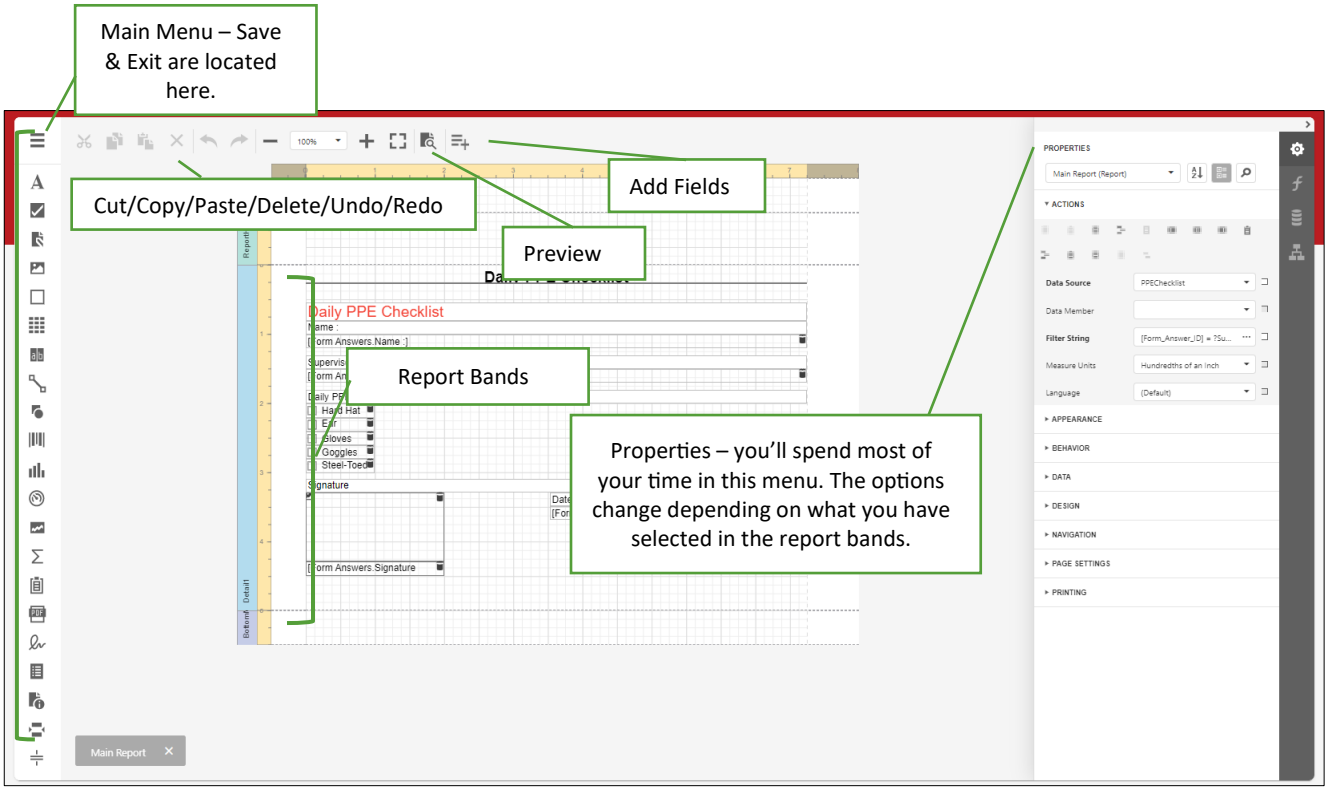
TIP: You may want to check report settings in Envelopes and Emails and remove the report prior to deleting it. The reports are removed from those areas when they're deleted but checking prior and updating these places with new associated reports ensures that the correct reports are being sent and prevents any gaps in those areas.

From the Reports menu, select the edit button for the report you want to delete. In the Manage Report window, click Delete.

REPORT FORMATTING TIPS

You can format your report to be as simple as you need or go as far as adding calculations and expressions to your report that go above and beyond your form. The information here is intended to show you how to make the most of the Report Designer to create functional reports. If you need more advanced help, we suggest working with OmniByte or another person in your organization who is familiar with report building or development procedures.

Report Designer UI



Landscape Page Orientation

Click on the grey area between the Report Bands and the Toolbox. This changes the Properties menu to apply to the whole report. Click Properties, then expand Page Settings. Click Landscape. You will need to update sub-reports to use landscape individually as well.

Page Margins

Margins can be changed by dragging the ruler to increase or decrease the size of the printable report space (indicated with a brighter yellow color in the margin). Or click on the grey area between the Report Bands and the Toolbox. This changes the Properties menu to apply to the whole report. Click Properties, then expand Page Settings, expand Margins, and change the size for each margin.

Select and Multi-select Fields

Click on the field so that you see boxes surrounding it. To select more than one field to change multiple fields at the same time, hold the Control key while you click. You can also drag your mouse to surround a field or group of fields to select, but the margins may make this a little tricky to get the right selection at times.

Fields and Labels

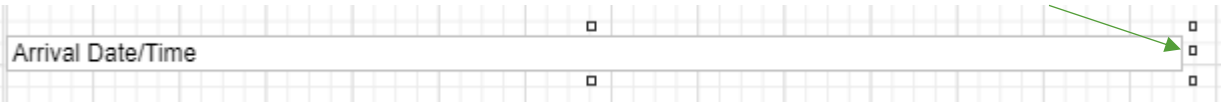
The fields and labels are auto sized to the width of the report, because of the format provided to those on the form. Labels appear directly above the field, and fields appear with [Form Answers.] preceding the label name.

Submitted By and Submitted On Fields

The Submitted_By and Submitted_On fields allow you to print on a form the name of the person who submitted the form and the date on which it was submitted. This information can be added to both advanced and basic forms.

Resizing

Make your selections and drag from the right middle box.



To resize to an exact size, make your selections, choose Properties, expand Size and change the Height and Width pixel size to an exact number. As a default, fields are 20 high and labels follow the sizing from the form. A label sized Small on the form will be 20 high. If you line up the label and field horizontally instead of vertically, you may want to resize them to be the same.

Fonts, Font Sizing, and other Appearance options

To apply a font or any other Appearance option to the whole report, click in the grey area between the Toolbar and Report Bands, click Properties and expand Appearance. You can also apply appearance options to a specific Report Band by clicking in the Colored area to the left of the ruler for that band, then change the Appearance options. To apply to only specific fields, select the field and change the appearance.

TIP: These options are fun to experiment with and can really make a difference in how professional your report looks. You can get exact colors for field backgrounds, borders/lines and text by clicking the drop arrow in those fields and entering the RGB or HEX color numbers.

Pictures and Signatures

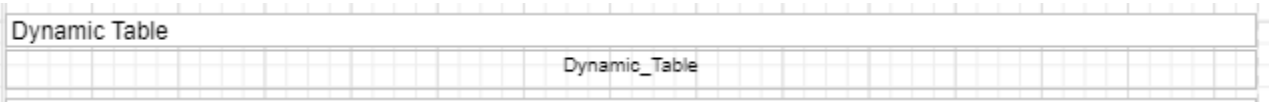
To ensure pictures and signatures fit into the box provided, select the picture/signature, choose Properties, expand Actions and change Sizing to Squeeze.

Static Tables

Static tables are added to the report as individual fields, but the layout matches the form. You can easily re-arrange the fields in your static table however you see fit.

Dynamic Tables

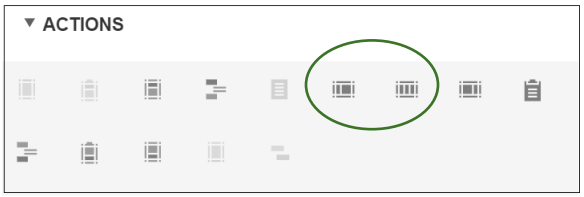
Dynamic tables are added to the report in a sub-report.



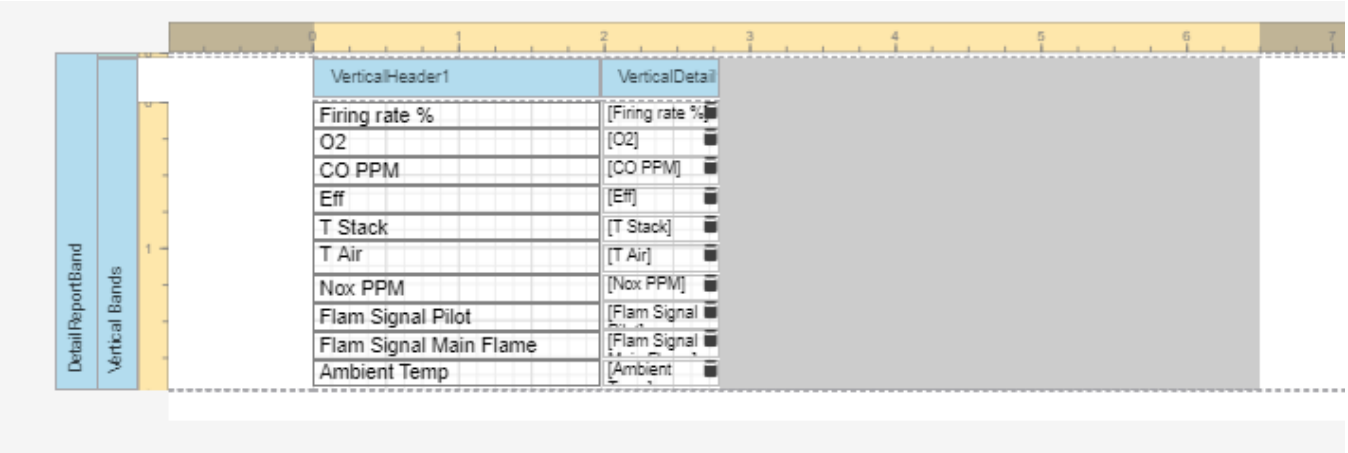
Double-click in the box around Dynamic_Table to open the sub-report. You can then use the same formatting tools to update the sub-report to match the remainder of your report. When you're done with changes to the sub-report use the Main Menu and choose Save. Then, click the name of your Main Report at the bottom of your screen to return to the main report. Switching using these buttons is a little faster than exiting the sub-report, and it leaves the sub-report "open" so that you can quickly click there to go back to it.

Vertical Tables

To flip a sub-report to print vertically, change the report bands in the sub-report to vertical bands. From the Actions menu select to insert a vertical header and a vertical detail.



Then move the headers into the vertical header and re-add the fields to the detail. You may need to shrink the detail band, as shown in the following illustration.



Shrink the old bands to non-visible. You may want to enlarge the margins on this report– even if you don't want to print in landscape.

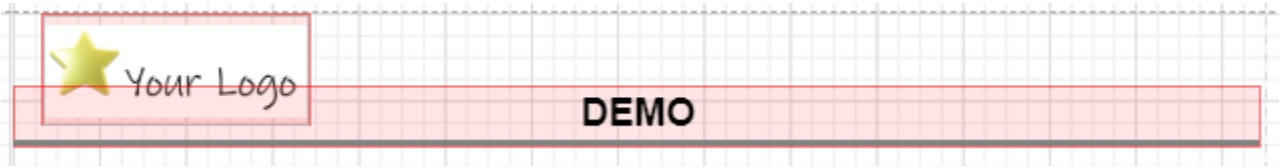
Note: Do not delete the Detail Report Band that is there. It is required for this to work. Also, if you put them on in the right order you can drag them from the horizontal to vertical.

Form Color Formatting

Color formatting from your form on Headings and tables will appear on the report. You can change those using the Appearance Options. Additionally, color formatting rules added to Number inputs will also appear on the report.

Report boxes are red

Anytime any information overlaps on the report, or falls outside of a margin, the box containing the overlapping information will turn red. For example, this logo and report name overlap so that the underline under the report name will expand across the whole page:



In most cases, this is ok – as in the example above, and your report will still work. Just be sure any text you need is not falling off the page or doesn't cover anything you need to see.

Text wrapping

By default, text wrapping is turned off for fields. If you have a long text field that you want to be sure is all included, in Properties, expand Behavior. Mark Can Grow if you want the height of the field to expand as the field grows and mark Multiline and Word Wrap.

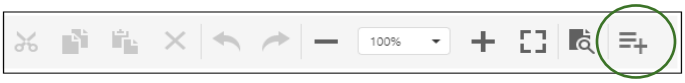
Preview

To preview your report format, click (Preview). The Preview page will open blank. Then, from the Preview Parameters pane, select a previously submitted form, or Blank Answer, click Submit. You'll then see what your data will look like on your formatted report. Sometimes, it helps to change the zoom to 100% to see how checkboxes and other fields line up and get a more accurate picture of your report. Click to return to the Designer.

REPORT TROUBLESHOOTING

I deleted something from my report and need it back.

If you haven't done much to the report yet, you can exit without saving and restart from your base report. Otherwise, you can find the report fields using the Add Fields button. When you click this button, a window opens that lists the fields and tables on the form that you can add to the end of the report. This is especially helpful when you've added tables or conditional fields to an existing form that already has a formatted report, because the sub-reports will be automatically generated for you.



To add a label, use the toolbar and drag on an XRLabel. To edit the text of the label, double click it and type in the text you want. Reformat the fields as needed.

Static table fields are listed as individual fields in the field list. If there are multiple fields with the same name, they will be numbered, although the first one in a series of numbers does not have a number. In order for your data to appear correctly, be sure to bring over the correct fields.

I'm trying to resize a field and it pulls my margin instead of my field.

Temporarily scoot your right margin to the right further than you need it to be, then drag to resize your fields. It also works to reduce the width sizing field instead of dragging if moving the margin doesn't work.

How can I see report data in Preview without publishing the form?

Unfortunately, you can't without publishing. However, you can create a Role that is assigned only to you, and assign that role to the form, you can safely publish the form without providing it to other mobile users. (You can do the same thing for a group of testers.) You can submit the form, then see the data for that submission in the Report Designer. (The role can be easily unassigned from the form and deleted when you don't need it any longer.)

My CSV file is restricted to my paper size.

Since CSV files are not typically printed on paper, you may want to start your report as landscape, to automatically size your table to the widest possible. Then, in the Report Designer, from the Properties Menu, expand Page Settings. From Paper Kind, choose Custom (the list is in alphabetical order). You are then able to change the Page Width and Page Height to whatever you need for the size of your data. In the grid in the Report Designer, 1 square is 1/100 of an inch, so if you have 12 columns of data, consider making the Page Width at least 1200, so that each column is 1 inch as a starting point. This will help you with the formatting of the data, the actual CSV file will not use those measurements unless you open in Excel.

ACCESS TO FORM DATA VIA DATA MAPS

Data mapping is the process of connecting a data field from one source to a data field in another source. Access to submitted form data is available several different ways in FormsPro. By mapping to a form, you can select which fields from a form you want to use submitted data.

Form data can then be passed into a data warehouse, which is a SQL database created on the same server as your FormsPro instance, through to Microsoft Azure Logic Apps and Microsoft Flow to any of the apps and sources they make available to you, through an HTTP POST to an endpoint you define, by a file drop data connection, by a stored procedure, or by an XML map to facilitate a connection to IFS FSM. Once the data is made available in these locations, your possibilities are limited only by the applications that use the data.

If you have multiple maps set up for a form, the order in which they are displayed in the Data Maps tab of the Forms Settings pop-up window is the order in which they are processed. You can use the handles on the left of each map to drag and drop the maps into a different order.

Multiple, different maps that run based on conditions in form answers can be set up. The data is then sent to the appropriate integration.

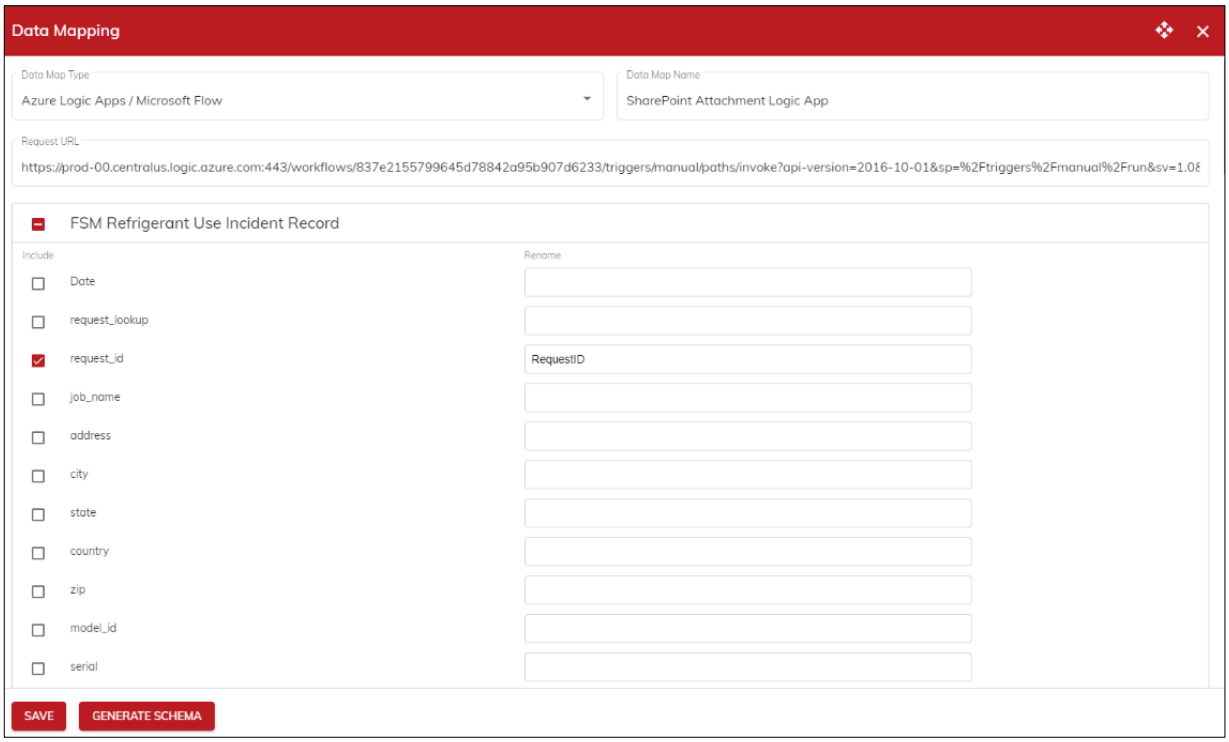
The Data Maps Log is available in the Event Logs page. If you need to reprocess a map that has an error, you can do so from there.

AZURE LOGIC APPS & MICROSOFT FLOW

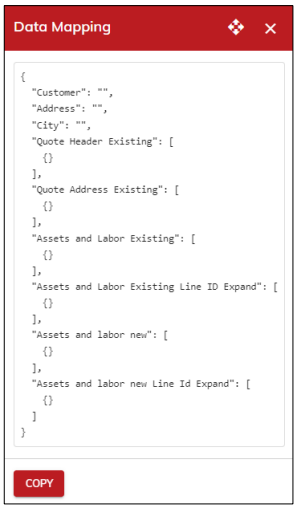
Use the available integrations in Azure Logic Apps and/or Microsoft Flow to use data from submitted forms in any of the applications available. Because there are so many available options with these applications, the information contained here is how to use the data map in FormsPro to integrate. We recommend using documentation from Microsoft in conjunction with this to fully integrate the data.

1. Choose (Default Settings), then scroll to the right to open the Data Maps tab. Click the **Add** button to open the Data Mapping window.

2. Choose **Azure Logic Apps/Microsoft Flow** as the data map type.



3. Name your data map. The data map is the name for the set of information you're mapping. Because you can create multiple maps for each form, use a name that helps you identify the information in the map.
4. Copy and paste the POST URL from your Azure Logic app.
5. Select any reports you want to attach with the data in other applications.
6. Select the fields you want to include in the data in the other application. You don't need to add all the fields and, because you can create multiple maps for each form, you can create an Azure Logic Apps/Microsoft Flow connection for some fields on your form and a separate one for others. If you know what you'll be using the data for, it will help you create an appropriate map. For example, if you're reporting on how many times a day a specific form is submitted, you don't need all the data from the form on the map, you'll only need the date, AnswerID and FormName that's at the bottom of the Data Mapping window.
7. You can rename any fields for use in the other application. We recommend shortening long form field names to a few words, such as when you use a long question as a field name but need to report on that data collected. You can't use the same name twice in a data map, so if your form has multiple tables with the same labels, you'll need to be careful when renaming.
8. Once you have the fields you want selected, click **Generate Schema** to open the Data Mapping window. Click **Copy** to copy the data to paste into the Logic Apps or Microsoft Flow application you're also setting up.

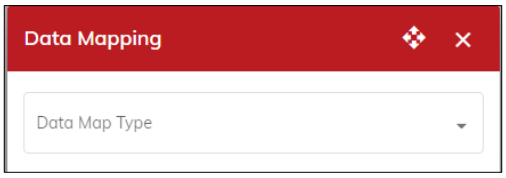


9. Click **Save**, then click **OK** to close Form Settings.
10. Your map is set up and you can complete the integration in the other application. When forms are submitted, you should see data from the form appearing in the integrating application.

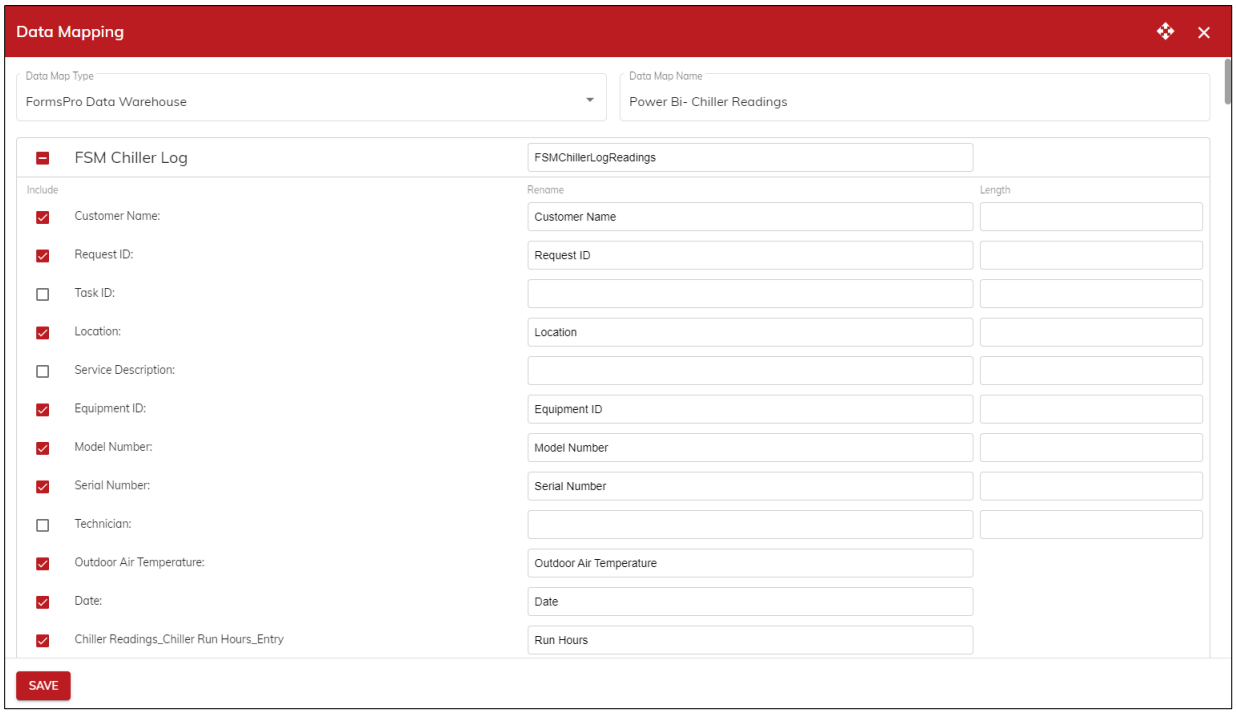
FORMSPRO DATA WAREHOUSE

Use the FormsPro Data Warehouse to build SQL tables which are accessible from the SQL database on your server. This makes it easy to create queries and search for a particular piece of data across multiple submissions of a form. You must have access to the database to use this feature.

1. Choose (Default Settings), then scroll to the right to open the Data Maps tab. Click the **Add** button to open the Data Mapping window.



2. Choose **FormsPro Data Warehouse** as the data map type.
3. Name your data map. The data map is the name for the set of information you're mapping. Because you can create multiple maps for each form, use a name that will help you identify the information in the map.



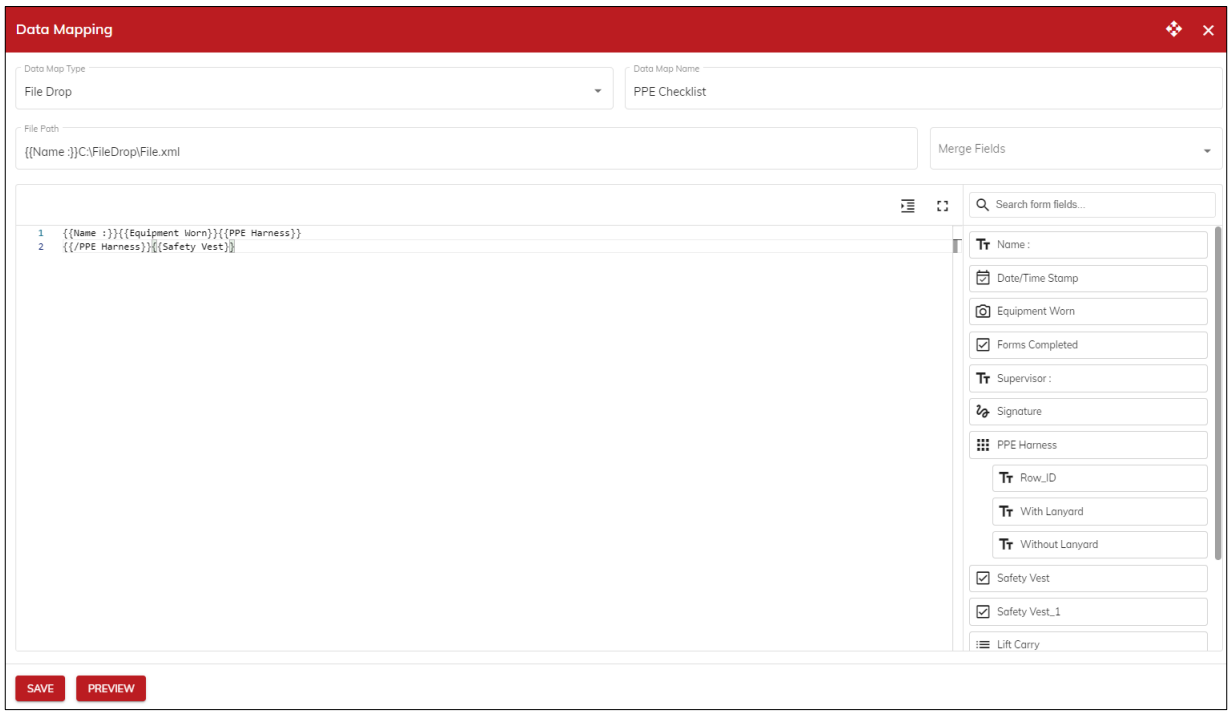
4. Mark the box next to the fields you want to include in the data warehouse you build. The fields are listed in the order they appear on the form. Static table fields appear as individual fields, but dynamic tables and conditional fields will create a separate table because of the nature of the recurring or conditional information. These will appear in the database using the table name and can be renamed as well. If you're mapping many forms, you may want to use the form name or some other identifier when renaming so that the table or conditional field has some context in the database list.
5. You don't need to add all the fields and, because you can create multiple maps for each form, you can create a map for some fields on your form and a separate one for others. If you know what you'll be using the data for, it will help you create an appropriate map. For example, if you are required to report on refrigerant used, but your form contains other service call information, you can create a data map for just the refrigerant information needed on the report to simplify the data sorted out.
6. You can rename any fields for use in the new database. We recommend shortening long form field names to a few words, such as when you use a long question as a field name but need to report on that data collected.
7. Identify the field length for text fields if you'll be using the data in an application with specified field lengths. Data is maxed to this length in the new database. For example, if you enter 200, the field size in the database will be 200, the data brought in will be truncated at 200 characters.
8. Click **Save**. Then click **OK** to close Form Settings.
9. Your database tables are created, and you can use other applications to query, view, or export the form data as you wish.

FILE DROP

Export form data to integrate with other applications. Data can be exported to an XML, JSON, or CSV file. If you want to store attachments in another application, you need to set up a file drop connection in addition to the Azure or Windows file share. If you are unfamiliar with information in this procedure, contact your IT department or support@omnibyte.com for help.

1. Choose (Default Settings), then scroll to the right to open the Data Maps tab. Click the **Add** button to open the Data Mapping window.

2. Choose **File Drop** as the data map type.



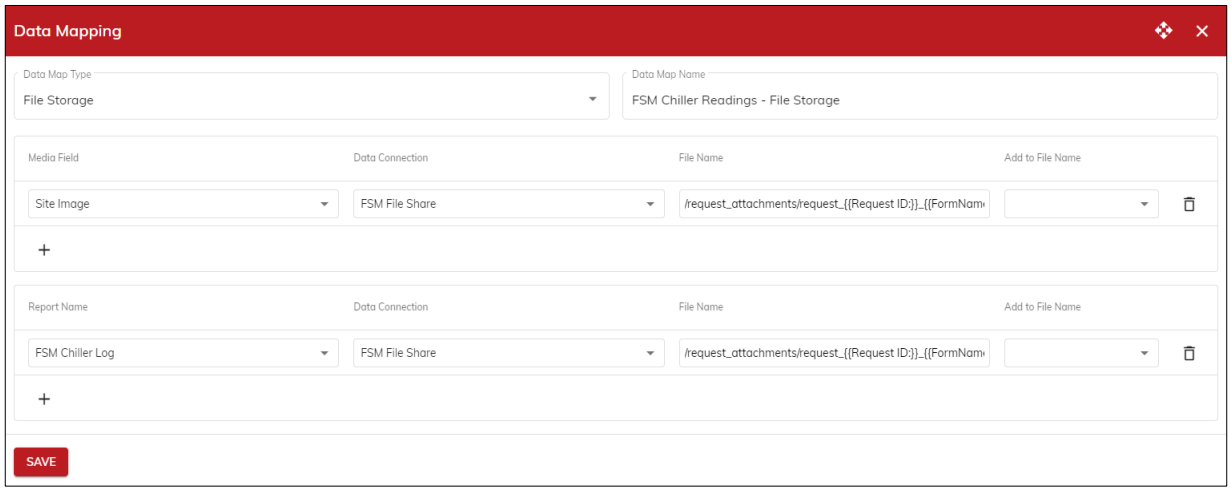
3. Name your data form map. This is the name for the set of information you're mapping. Because you can create multiple maps for each form, use a name that helps you identify the information in the map.
4. Enter a file name and a path where you want to save the file layout, then select what you want to add to the file name.
5. Define the file layout by selecting the merge fields you want to include.
6. Once you have the fields you want selected, click **Preview** to open a Preview window.
7. Click **Save**, then click **OK** to close the Form Settings window.
8. Your map is set up and you can complete the integration in the other application. When forms are submitted, you should see data from the form appearing in the integrating application.

FILE STORAGE

File storage data maps are used to store attachment, image and field data from an attachment, or image at a certain location. If you are unfamiliar with information in this procedure, contact your IT department or support@omnibyte.com for help.

1. Choose (Default Settings), then scroll to the right to open the Data Maps tab. Click the **Add** button to open the Data Mapping window.

2. Choose **File Storage** as the data map type.



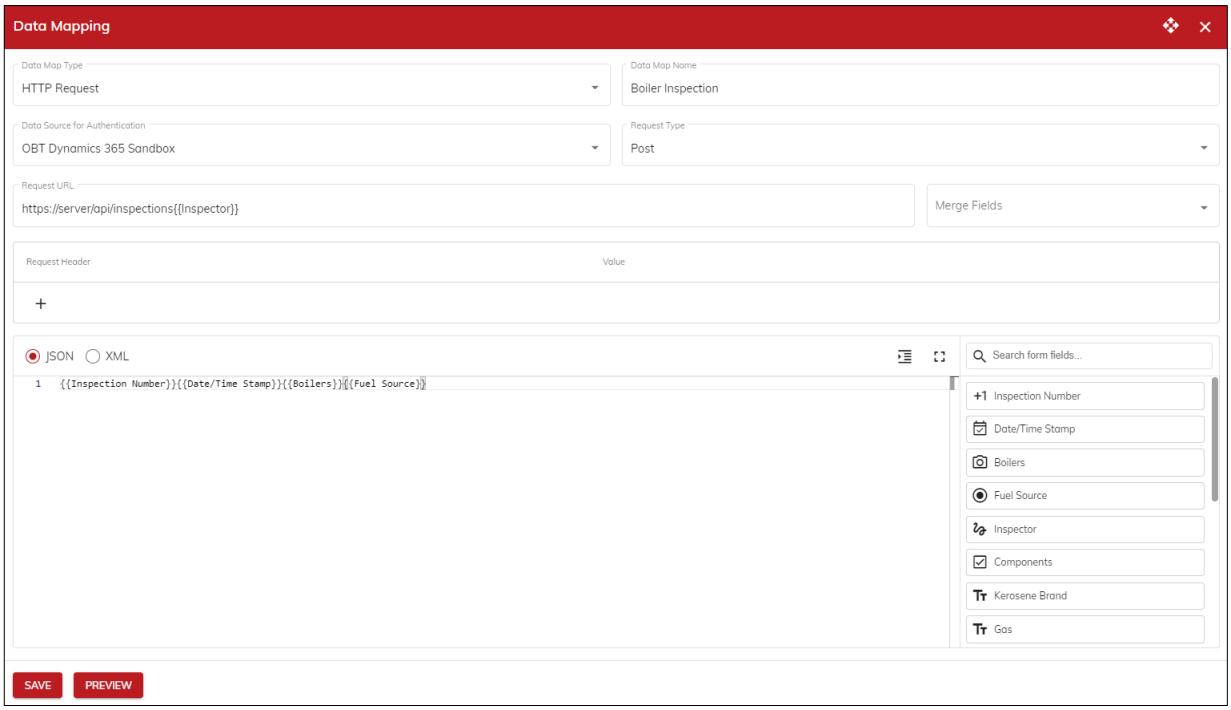
3. Name your data form map. This is the name for the set of information you're mapping. Because you can create multiple maps for each form, use a name that helps you identify the information in the map.
4. Select the media field and data connection information.
5. Select the report name and data connection information.
6. Click **Save**, then click **OK** to close the Form Settings window.
7. Your map is set up and you can complete the integration in the other application. When forms are submitted, you should see data from the form appearing in the integrating application.

HTTP REQUEST

HTTP request data maps can be used to integrate submitted FormsPro data with any other endpoint you define. If you are unfamiliar with information in this procedure, contact your IT department or support@omnibyte.com for help.

1. Choose (Default Settings), then scroll to the right to open the Data Maps tab. Click the **Add** button to open the Data Mapping window.

2. Choose **HTTP Request** as the data map type.



3. Name your data map. The data map is the name for the set of information you're mapping. Because you can create multiple maps for each form, use a name that will help you identify the information in the map.
4. If the endpoint you are calling is secured through a token, select the data source that you configured in the data connection window. The authorization will be called to secure a token prior to calling the request URL. If you have a static token, or do not require authorization to the endpoint, leave this field blank.
5. Select the request type. Consult the documentation for your endpoint for guidance on which request type should be used.

   Select **Post** to send data to a server to create or update a resource.

   Select **Put** to send or replace data to a server to create or update a resource.

   Select **Patch** to apply partial modifications to a resource.

   Select **Delete** to delete a resource from the server.
6. Enter the request URL. This is the endpoint that is called to perform the data map functionality. As part of this URL, you can select fields on the form whose values will then be sent as part of the URL. Some endpoints require a field or fields be used to identify the target record(s) in the system you are integrating to. Selecting these merge fields allows the call to have the value of the field on the form to be embedded in the call.

   For example, a REST endpoint is configured to update a work order. It might require the caller to use a patch request type and the URL looks like https://<your server>/api/workorders(workorderid) where workorderid is the ID of the work order you are updating. On your form you have a field called Work Order Number. When building the URL you would enter the path listed above https>//<your server>/api/workorders(work order number) where the work order number is selected from the merge fields.
7. Enter the request header. Any information entered in this field will override the header if you select data source.

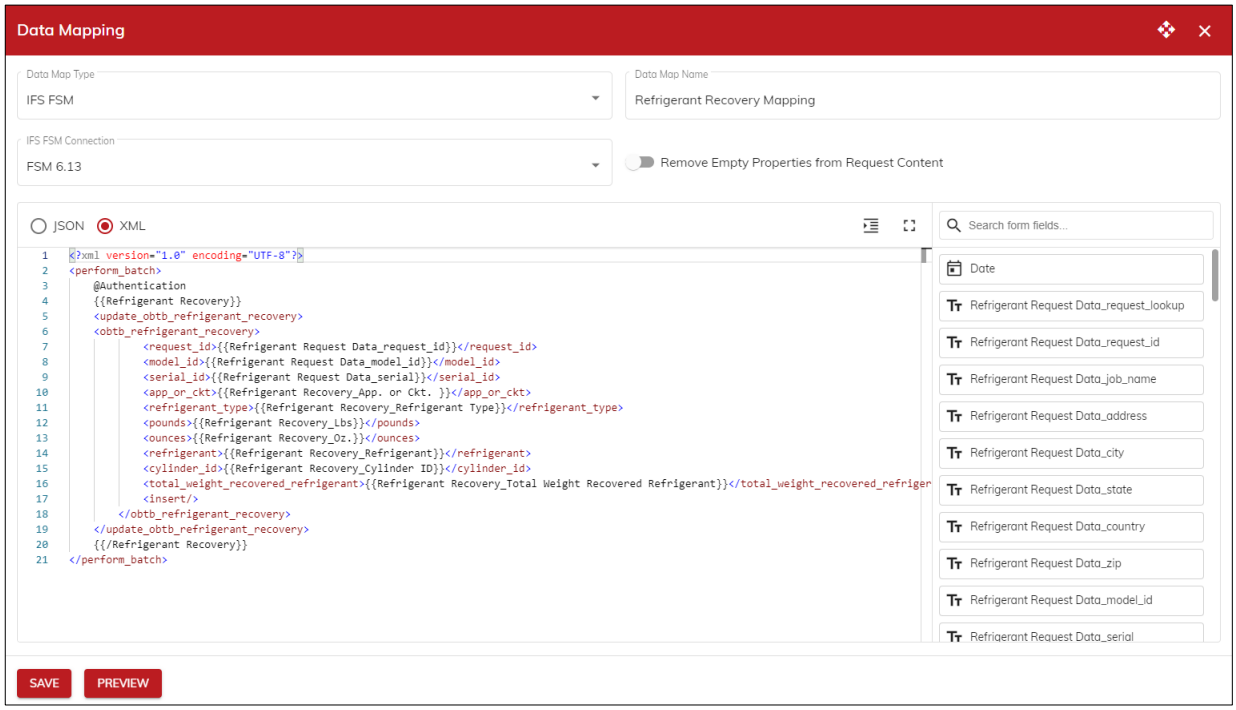
8. Select the fields you want to include in the data in the other application. You don't need to add all the fields and, because you can create multiple maps for each form, you can create a HTTP request connection for some fields on your form and a separate one for others. If you know what you'll be using the data for, it will help you create an appropriate map.
9. You can rename any fields for use in the other application. We recommend shortening long form field names to a few words, such as when you use a long question as a field name but need to report on that data collected.
10. Once you have the fields you want selected, click **Preview** to open a Preview window.
11. Click **Save**, then click **OK** to close Form Settings.
12. Your map is set up and you can complete the integration in the other application. When forms are submitted, you should see data from the form appearing in the integrating application.

IFS FSM

Define an XML map to facilitate a connection to IFS FSM. If you are unfamiliar with information in this procedure, contact your IT department or support@omnibyte.com for help.

1. Choose (Default Settings), then scroll to the right to open the Data Maps tab. Click the **Add** button to open the Data Mapping window.

2. Choose **IFS FSM** as the data map type.



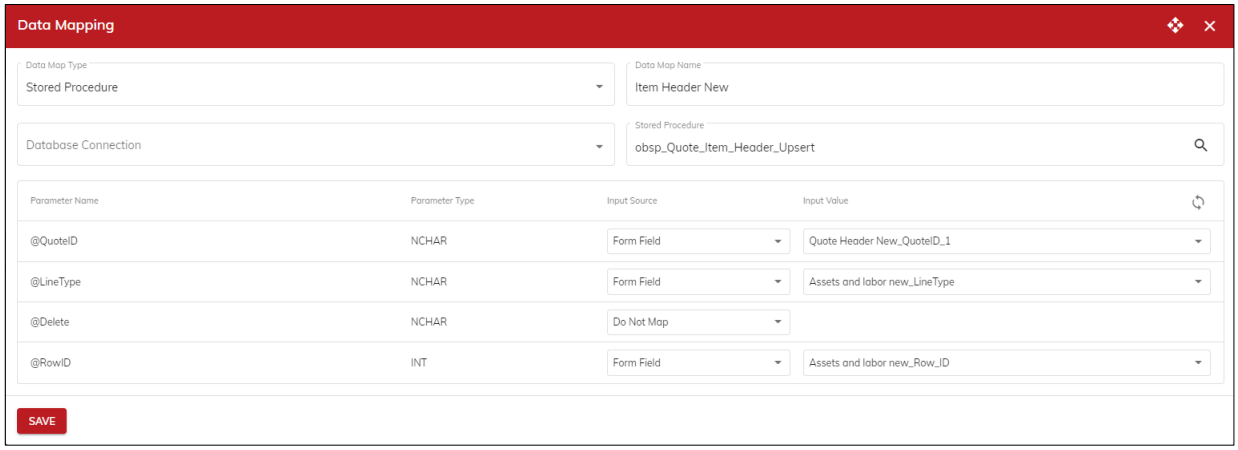
3. Name your data map. This is the name for the set of information you're mapping. Because you can create multiple maps for each form, use a name that helps you identify the information in the map.
4. Select the IFS FSM connection that was set up in the Data Connections window.
5. Enter authentication information and insert the form fields.
6. Once you have the fields you want selected, click **Preview** to open a Preview window.
7. Click **Save**, then click **OK** to close the Form Settings window.
8. Your map is set up and you can complete the integration in IFS. When forms are submitted, you should see data from the form appearing in the IFS FSM.

STORED PROCEDURE

Form submissions can execute stored procedures to make integrating FormsPro with other solutions easily configurable. If you are unfamiliar with information in this procedure, contact your IT department or support@omnibyte.com for help.

1. Choose (Default Settings), then scroll to the right to open the Data Maps tab. Click the **Add** button to open the Data Mapping window.

2. Choose **Stored Procedure** as the data map type.



3. Name your data map. This is the name for the set of information you're mapping. Because you can create multiple maps for each form, use a name that helps you identify the information in the map. This is especially useful when viewing data map logs as that name shows, as well as the form name.
4. Select a database connection.
5. Select the stored procedure that contains all the stored procedures in the database specified by the data connection. The parameters of the stored procedure are displayed, including the parameter name and parameter type.
6. Select the input source type:

Form Field allows you to map a field on the form to a parameter in your stored proc. Then select the input value.

Report Data allows you to map a report to a parameter in a stored procedure to include the binary data of the report into an appropriate parameter such as varchar(max).

Value allows you to map a static value to a parameter in your stored procedure.

Do Not Map allows you to not assign a mapping which will then remove the parameter from the call to the stored procedure. This is especially useful for parameters that have default values defined when the parameter is not passed.

The **Input Value** field is either the name of the form field, report field or static value. If Do Not Map is the selected input source type, this field is not available as there is nothing mapped.

If the parameter is mapped to a dynamic table, the stored procedure is executed for each row in the table.

7. Click **Save**, then click **OK** to close the Form Settings window.
8. Your map is set up and you can complete the integration in the other application. When forms are submitted, you should see data from the form appearing in the integrating application.

When using tables and sub-tables it's important to make sure you have the tables defined properly before setting up the maps. If you decide to delete a table or make drastic changes to a table your map will need to be redefined.

USING THE MOBILE APP

The FormsPro App is used to complete the forms created in the administrator portal. Forms that have been assigned to your assigned role(s) appear in the app when you sync the app.

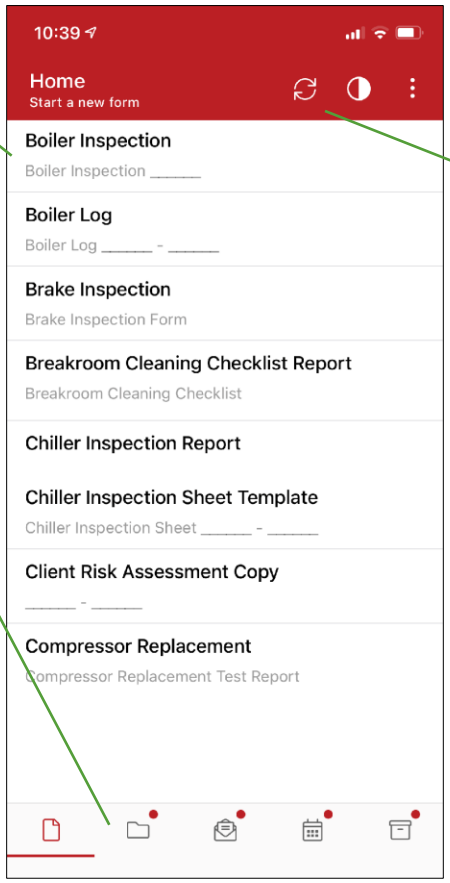
The app requires no set up. Once you are associated with a user role and have forms assigned, all you need to do is log in.

The following shows the Home page of the FormsPro app. This illustration is from a smartphone. The tablet version of the homepage is the same but appears wider.

The list of available forms you have to work on.

Buttons to change the list of forms.
New – forms you have not started or saved but are assigned to your user role.
Saved/Received – forms you have saved or received via transferred or linked forms.
Envelopes* – forms to complete and email as a group.
Dispatched– forms that are dispatched to you.

Workflow* – forms that are assigned to you as a step in a workflow. You need to complete an action on these forms.



Sync - brings any new forms to your device including any newly assigned forms from a workflow.
High Contrast – changes the appearance to high contrast for working in bright light.
More menu- displays the user logged in, opens the **Settings** page, **About FormsPro** page, **Change Password, Deleted Items** page and a **Log Out** button.

Before you begin

There are a couple device options you may want to change before beginning. These options are in your device settings.

- If you are an iPhone or iPad user, you may want to turn off Smart Punctuation if your integrating applications are not compatible with Smart Punctuation. Some applications do not recognize “curly” quote marks and will insert odd characters in place of them. Turning this option off will prevent “curly” quotes from replacing “straight” quotes.
- If you are an Android user, some phones have numeric keypads which do not allow for negative numbers. Check to be sure the keypad you’re using does allow you to enter a negative number. We have found that the SwiftKey Keyboard from SwiftKey (available from the Google Play Store for free) does not put the decimal point on another screen, and also provides a Next key for moving from field to field.

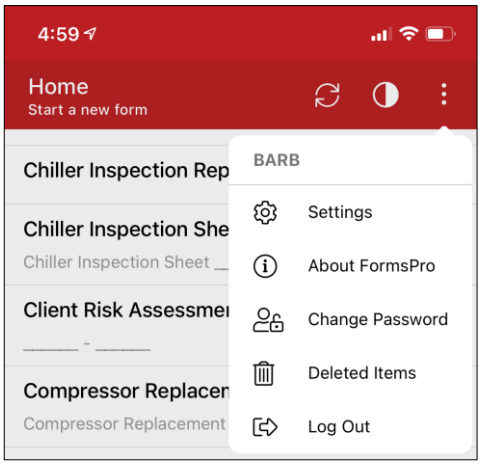
This change does not affect iOS devices, or the Windows app.

USING FORMSPRO ON YOUR DEVICE

Using FormsPro is as simple as selecting the form you need to do your work. The form opens, and you can make the appropriate selections as needed. Once your work is complete, click Submit; or click Save to finish the form later.

MORE MENU

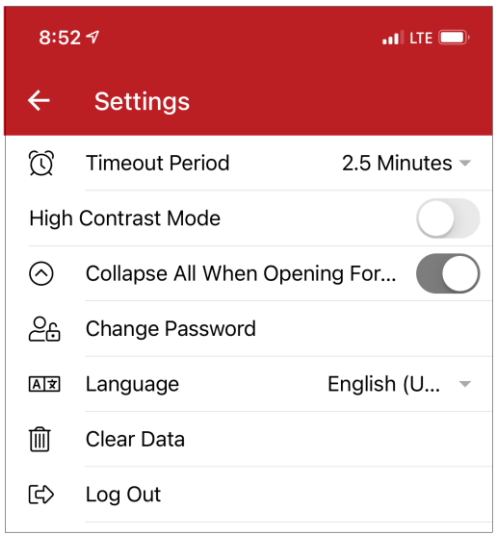
The More menu opens the Settings page, the About FormsPro page, the Change Password page, and the Deleted Items page. In addition, the user logged into FormsPro is displayed and this is where you log out of FormsPro.



SETTINGS PAGE

Use the Settings page to select the contrast mode, change a password, select the language, clear data, and log out.

1. From the **More** menu, select Settings.



2. Specify how much time you want to wait for a connection to be made before the FormsPro app times out on each of your devices. (A default timeout period was set up in the Security Settings window in the Admin site.) Timeout periods can be specified from 30 seconds to 3 minutes, in 30 second increments. If a connection isn't made after the amount of time selected, an error appears.

3. Toggle the **High Contrast Mode** option to change the appearance to high contrast for working in bright light.
4. Toggle the **Collapse All When Opening Forms** option on to always open forms with all collapsible areas collapsed.
5. If you need to change your FormsPro password, click **Change Password**.
6. Select the language to use in FormsPro. You can select from Chinese Simplified, Chinese Traditional, Danish, Dutch, English (US), Finnish, French, German, Italian, Japanese, Korean, Norwegian, Portuguese (Brazil), Russian, Spanish (Spain), Spanish (US), and Swedish. Dates and times are displayed in the regional format of your device. All form text, including form names, questions, responses, and things outside of forms such as work order notes and notifications, display in the language in which it was written.
7. Select **Clear Data** to clear the data from your device. This is something we do not recommend doing.
8. Select **Log Out** to log out of your FormsPro session.

ABOUT FORMSPRO PAGE

The About FormsPro page displays the Terms of Use and Privacy Policy information, the version number of the app, the OmniByte copyright information and a link to the OmniByte website.

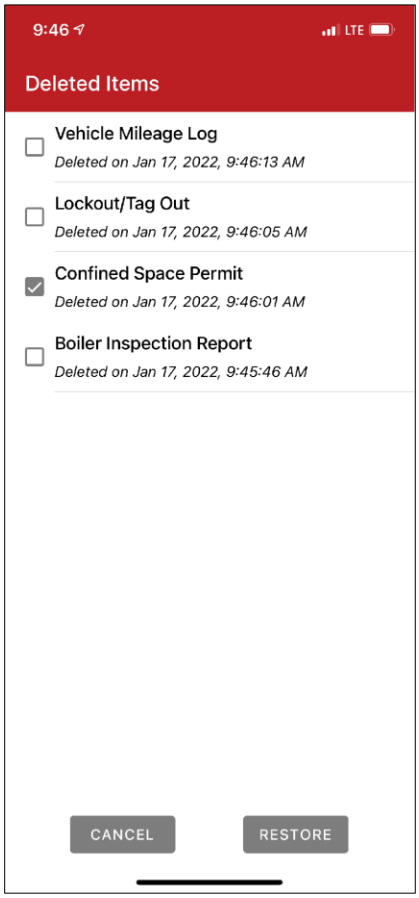
Click the information icon to display the entire Terms of Use and Privacy Policy statement.

Click the OmniByte logo to open the OmniByte website.

DELETED ITEMS PAGE

The Deleted Items page displays forms and envelopes that you deleted and allows you to restore them within five days. In the following illustration, the PPE Checklist Report and the Chiller Inspection Report have been

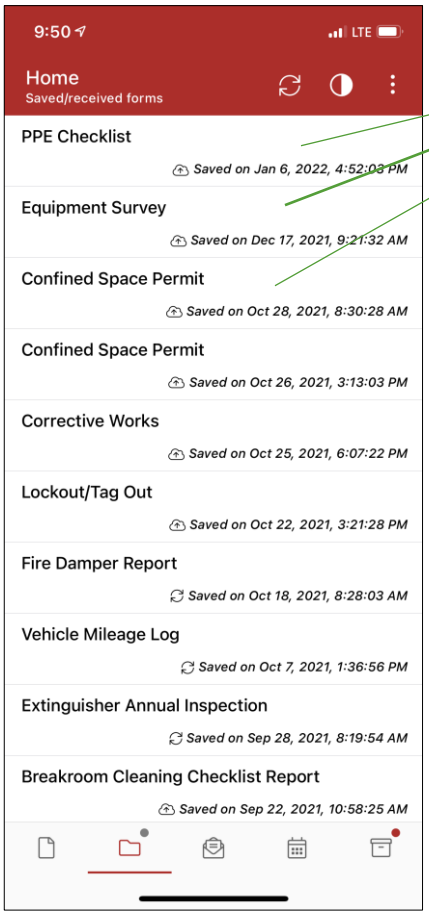
deleted. The Chiller Inspection Report is marked to be restored. Once the report is restored it will appear back in the Saved/received forms folder or Envelopes folder.



SAVING TO THE CLOUD

Data entered on the mobile app is saved to the cloud. This prevents you from losing data if a device locks up or has an error that keeps you out of the app. You can also start a form on one device and finish it on another. Once a form is submitted, the cloud storage of the form is removed.

NOTE You must be online to save to the cloud.



If a form is saved successfully, a cloud icon appears next to the form on the tab where it is saved. If there is no icon, the form was not saved to the cloud.

TABLES IN THE APP

If there is a large static table in the form, you can lock the header row and column so that the labels continue to be displayed as you move around in the table. Click to unlock and lock the headers.

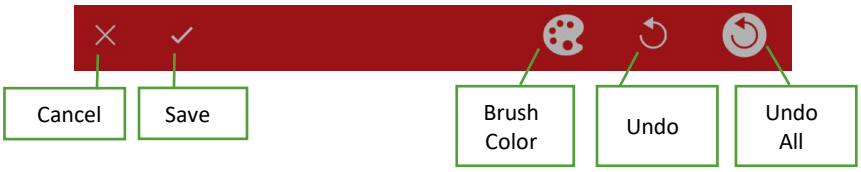
Dynamic tables can be pivoted to show rows as columns and vice versa in the app. This is useful for tables that have few rows but several columns that will require a lot of back and forth scrolling. Click to rotate the table, click it again to revert to the original format.

GPS COORDINATES

If the form has a GPS Coordinates input, there will be a button to click to find your current latitude and longitude. This information cannot be edited, but it can be deleted and recalculated. You can click Map to determine whether the coordinates are correct. If the GPS Coordinates are required, you won't be able to submit a form without getting this information.

ANNOTATING AN IMAGE

You can do simple annotations on an image taken in the app by clicking Annotate next to the image. The image will open, and you can change your brush color by selecting the palette icon. Use your finger to draw or write on the image. Use the following buttons to complete your annotation. You can undo the annotations since you clicked Save using Undo, or all annotations using Undo All.



COPY HISTORY

Certain forms may be set up to copy history from a previous submission. For forms set up to do this, when you enter the key field for the data, several other fields will be auto populated from the last submission for the key field. If no information appears in other fields, it is because no form met the date requirement set up for the history copy.

Fields that were copied can then be edited as needed, for quick and easy form entry.

BENCHMARK FIELDS

You may see additional information about the entries in a form that appear like this:

CHILLED WATER READINGS

Temps & Pressures	Results
Chilled Water Temp In	70.00 Degrees *Design Spec 55* *> 10% Design Spec*

In this example, the words *Design Spec 55* display the specification for this field. The label may change depending on how the information is set up. This is here for you to use to gauge the difference between your reading and what the system was set up at.

Also, in this example, you see a red outline around ***>10% Design Spec***. This indicates to you that the entry made is more than 10% over the design specification. Depending on the work you're doing and your company procedures, this may indicate that your entry was incorrectly entered, or that it's something you'll want to follow up on later. The words in this outline and color of the outline will change depending on how the field was designed to alert you.

LOCK FIELDS BUTTON

A form may have a Lock Fields button on it which will disable entries on the form and prevent them from being changed. This action cannot be undone.

EMAILS AND ENVELOPES

If your form can be emailed (emails are set up in the Administrator site), and the form was set up to do so, you can enter an email address to send the form to before you click Submit. You will automatically be added to the list of people to send the form to. If you want to receive the form in an email, be sure to keep your email address marked. There are no other actions needed on your part to email an individual form.

If your form is part of an Envelope, you'll want to start the Envelope before completing the associated forms.

1. Click **Envelopes**. Then, click the Add button at the bottom right of the screen.
2. Select the envelope you want to start, then enter a description. The description is used for the subject on the email that is sent when the envelope of forms is submitted.
3. Select a form to begin working on and click **Start**. You can save in-progress forms to finish later, and they will be listed under Unsubmitted Envelopes on the Envelopes page.
4. Click the envelope to open it and finish your in-progress forms or start a new form.
5. When you are ready to submit the envelope, expand the Expand to Submit area at the bottom of the page. You can manually enter email addresses and submit the envelope and the forms it contains.

A saved form can be moved into an envelope by swiping right on the saved form and selecting the envelope you want to add it to.

TRANSFERRING A FORM TO ANOTHER APP USER

A form can be saved and transferred to another mobile app user to complete. This is useful when you have a supervisor who must complete a form prior to submitting, or if a user has to leave a site and another user must complete the work.

User 1 must first save the form. In the Saved/Received list, User 1 can swipe right on the saved form. The Transfer to another user button will appear. Click it and select the username for User 2. Confirm the transfer. The form will be transferred to User 2, who will receive a notification that a form was transferred to them. The transferred form appears in the Saved forms list to open and complete.

OTHER ASSIGNED FORMS

You may also receive a form that is the result of a linked form. You will receive a notification that you have been assigned a form. Complete the form and submit as usual.

If you are responsible for assigning a linked form, at the end of the form, select the person to send it to, and submit as usual.

DELETING AND RECOVERING FORMS AND ENVELOPES

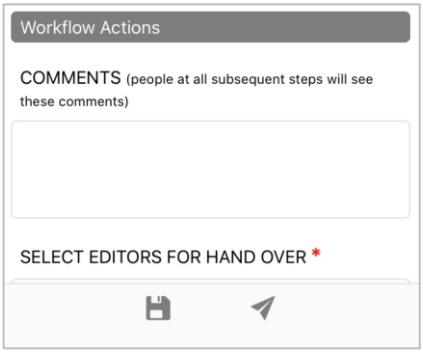
A saved form can be deleted by swiping left on the form. The Delete button will appear, click it to confirm the deletion. You will have a few seconds to undo your delete if you choose.

Deleted forms and envelopes are “stored” for five days and can be recovered during that time. Click the More menu, then Deleted Items. Mark the box next to any forms or envelopes you want to recover and click Restore. The form will return to the Saved/Received or Envelopes list.

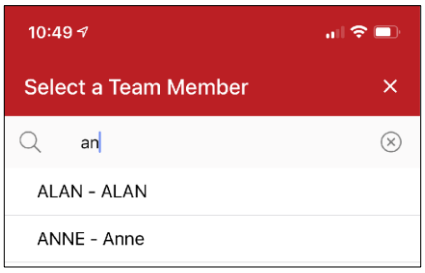
WORKFLOW

Starting a Form with Workflow

A form you start may have a workflow assigned, in which case, you may have selections to make before you can move the form to the next step of the workflow. At the end of the form, you’ll see a section of Workflow Actions which is after the email options.



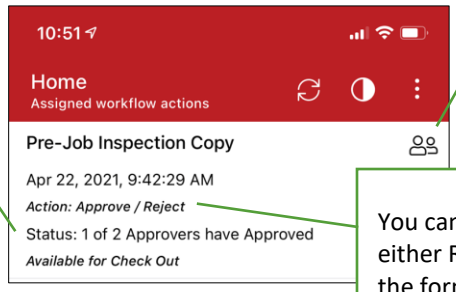
Enter any comments you want to record with the workflow, and then you may need to select the next users to send the form to. The fields will prompt you for what you need to select – a Team, Team Lead or Secondary Lead or a user. When you click the lookup, you’ll need to search for the name of the selection. Type the first few letters of the name and the user or team will be shown:



Click Submit and the form will be automatically sent to the users assigned.

Completing a Workflow Step on the App

If you are assigned a step of a workflow, you'll receive a notification, and will see the form in the Workflow tab, with information about the form status and what action you need to take.



Multiple users were required to take an action on this step. The status shows how many users have completed their action.

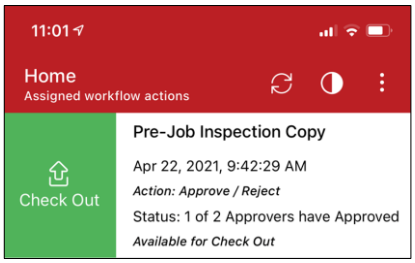
This icon shows multiple users are required to take an action to hand over to the next step.

You can see what action you need to take – either Review & Edit, which allows you to edit the form, or Approve/Reject.

All forms in the workflow must be checked out to make changes. You can see here whether you can check out the form now or not.

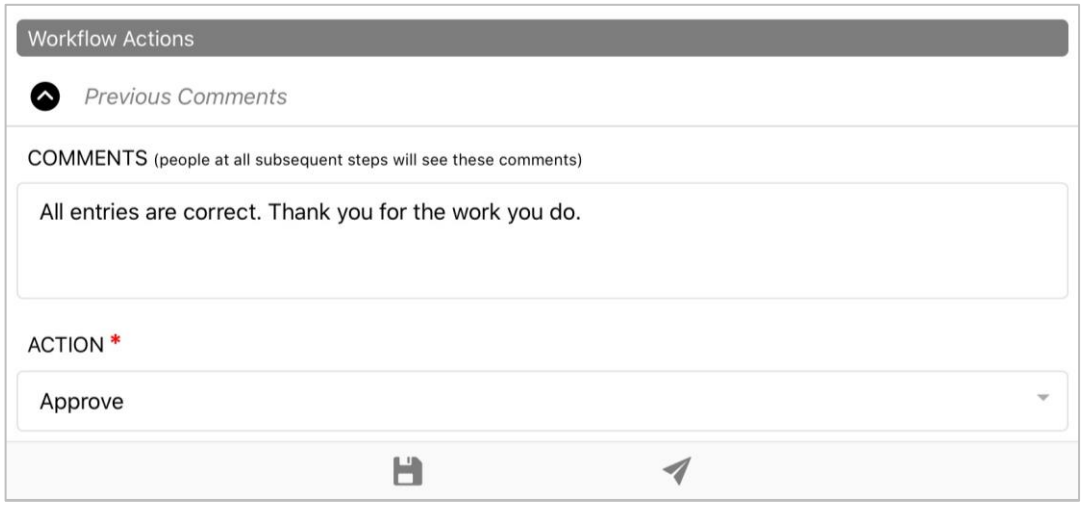
If you are the only person assigned to a workflow step, the form will appear checked out, whether you are online or not. If a form is checked out by another user, you will be able to open it and review, however, note that any changes the other user is making won't be available until the form is checked in.

To check out a form, swipe right on the form. Then click **Check Out**.

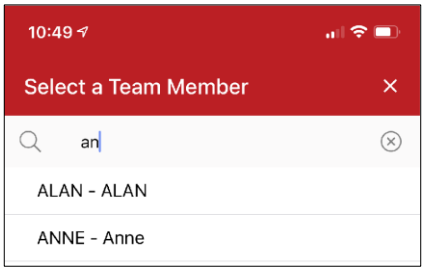


You can perform the same action to undo a checkout. No changes you've made will be saved, and the form is available for others to check out.

When you've completed your review, enter an optional comment, and then select the Action:



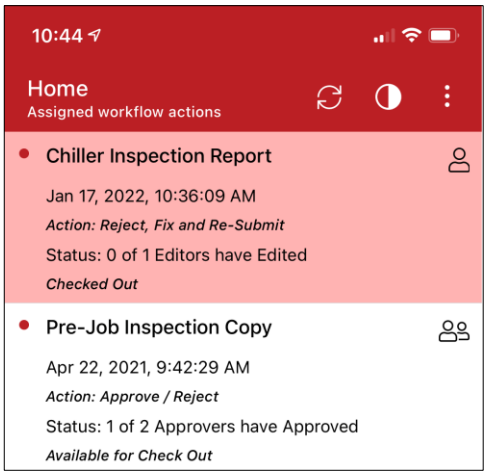
You may need to select the next users to send the form to. The fields will prompt you for what you need to select – a Team, Team Lead or Secondary Lead or a user. When you click the lookup, you'll need to search for the name of the selection. Type the first few letters of the name and the user or team will be shown:



Click Submit and the form will either go back to your Workflow tab and wait for all other assigned users to take an action; or if you are the only person needed for the action or the last person to take action, the form will be removed from your device and go the next step.

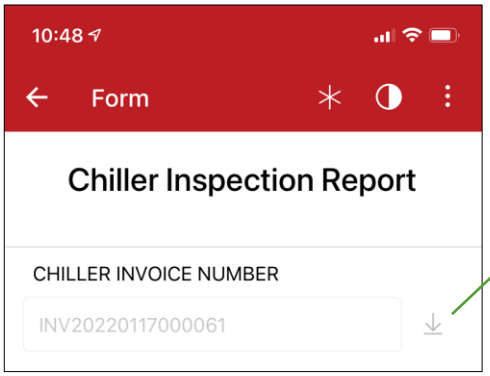
REJECTED FORMS

Forms that are submitted and rejected by the next person in the workflow are shaded red in your workflow list for easy identification, as shown in the following illustration. Make any required changes and resubmit the form.

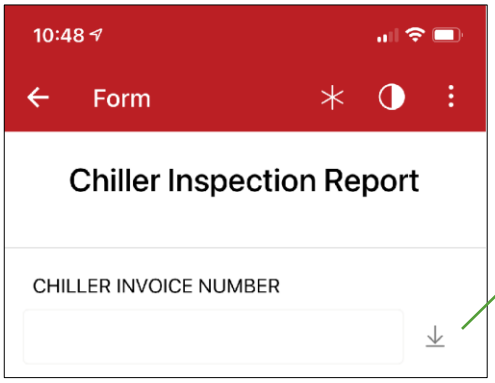


AUTO-INCREMENTED NUMBERS

Auto-incrementing numbers are user-defined document numbers that allow for better document tracking. These numbers increment when a form is dispatched, when a form is submitted (leave the auto-incremented number field blank), or manually by clicking the Get a Number icon.



This invoice number incremented automatically when the form was dispatched.



Leave the auto-incremented number field blank to retrieve the number when the form is submitted. Click the Get Number Value icon to generate the auto-incremented number.

DISPATCHED/SCHEDULED FORMS

Dispatched/scheduled forms can contain pre-filled data that help you complete your work and will be listed on your device when it is scheduled to be completed.

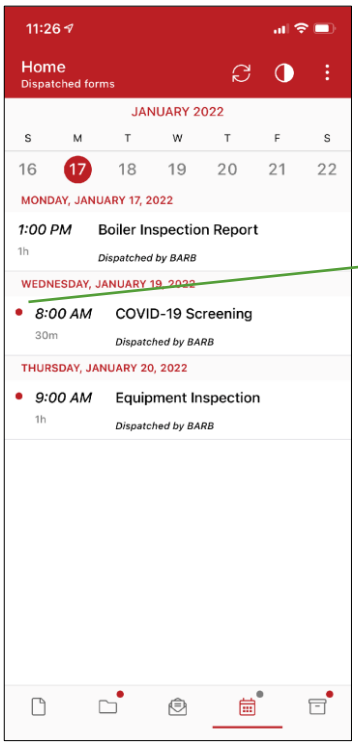
A notification may be sent to your device notifying you that a form has been dispatched that requires your attention. Notifications can be sent when a form is dispatched, updated, or deleted.

This is an example of a notification sent to a technician's device.

Operating systems prioritize items to save on battery power. We recommend that you optimize the battery usage on your devices to ensure that notifications function properly, and data is synced efficiently.

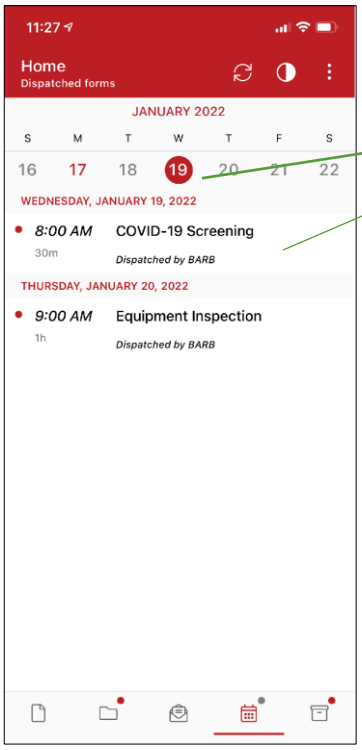
The following illustration displays the Dispatched/scheduled forms menu. This menu is used to view the forms that have been dispatched and scheduled to you.

A dot next to the Dispatched/scheduled forms menu item indicates there are forms dispatched/scheduled.



A dot next to a form in the Dispatched/scheduled forms list signifies that a new form has been dispatched.

1. Click  to view the forms that are dispatched/scheduled.



When you click on a date, the dispatched form for that date comes to the top of the forms list.

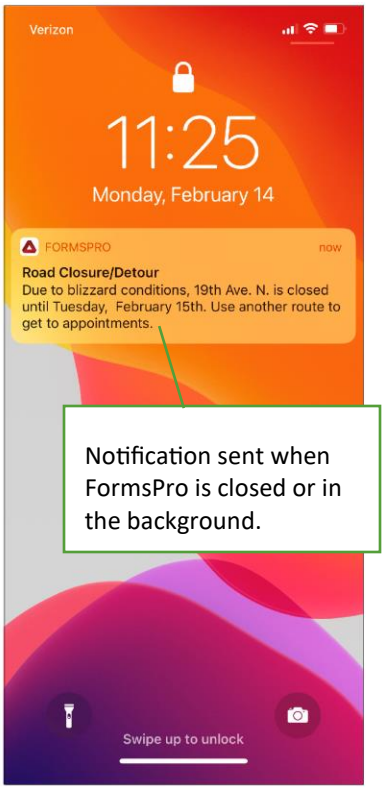
2. Click a date to view the dispatched/scheduled forms for that date.
3. Click on a form in the list to open it and process it as normal. Once a form is submitted, it no longer appears in the Dispatch/Scheduled list. If you save a form that was dispatched, you will need to open it from the Saved tab to continue the form.

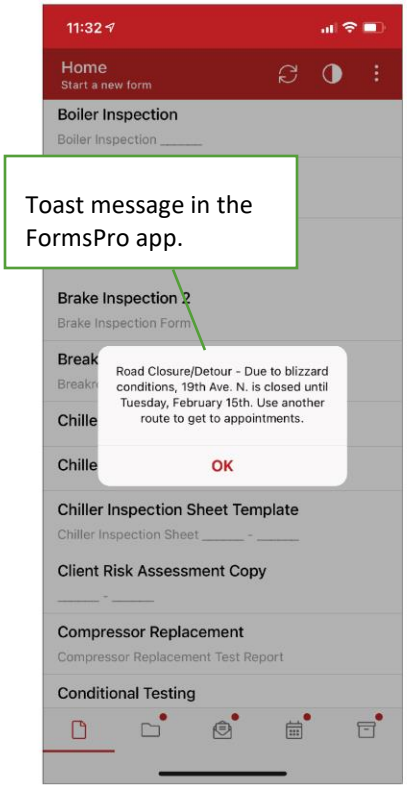
NOTIFICATIONS

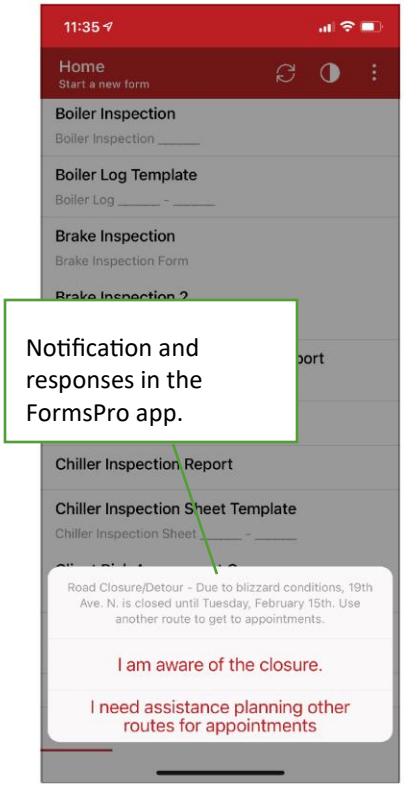
A notification may be sent to your device to alert you of some important information, such as a weather emergency. To receive a notification to your device, you must be logged into FormsPro.

Notifications function a bit differently depending on if FormsPro is open, closed, or active in the background.

FormsPro is Closed or Active in the Background
When the FormsPro app is closed or active in the background and a notification is sent that doesn't require a response, click the notification, or open FormsPro to view a toast message in the middle of your screen. If a response is requested, when you click the notification or open FormsPro the notification and its responses appear at the bottom of your screen. You need to respond to the notification before you can continue using FormsPro.

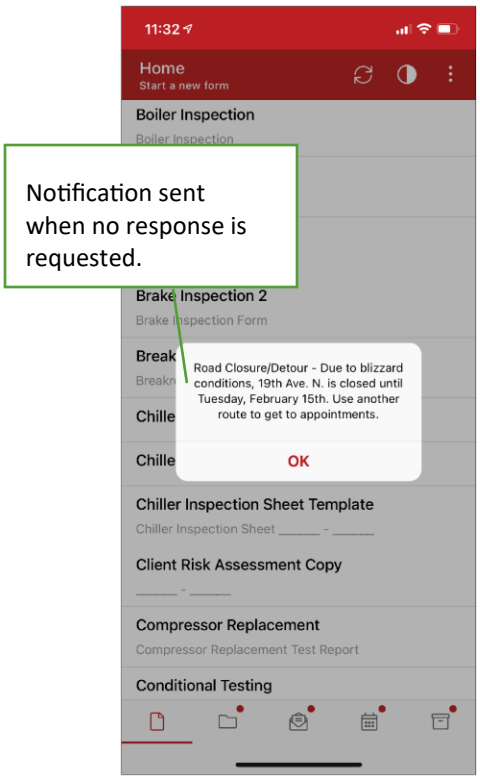


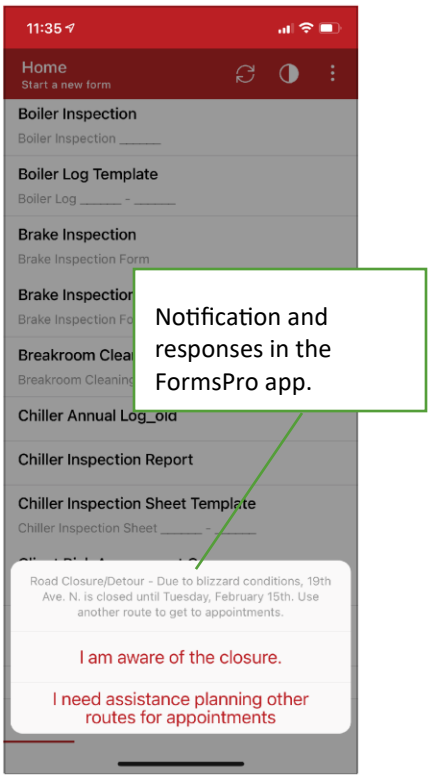




FormsPro is Open

When the FormsPro app is open and a notification is sent that doesn't require a response, a toast message with the notification will appear in the middle of your screen. If a response is requested, the notification and its responses appear at the bottom of your screen.





You need to respond to the notification before you can continue using FormsPro.

If using iOS and you have FormsPro closed on your device, if you don't use the notification to open FormsPro, you won't receive the dialog box when you open FormsPro.

If a notification is sent that doesn't require your response, a toast message will appear in the middle of the screen that you will need to dismiss in order to continue working. If you aren't in FormsPro the toast will appear when you open the app.

CONTACTLESS SIGNATURES

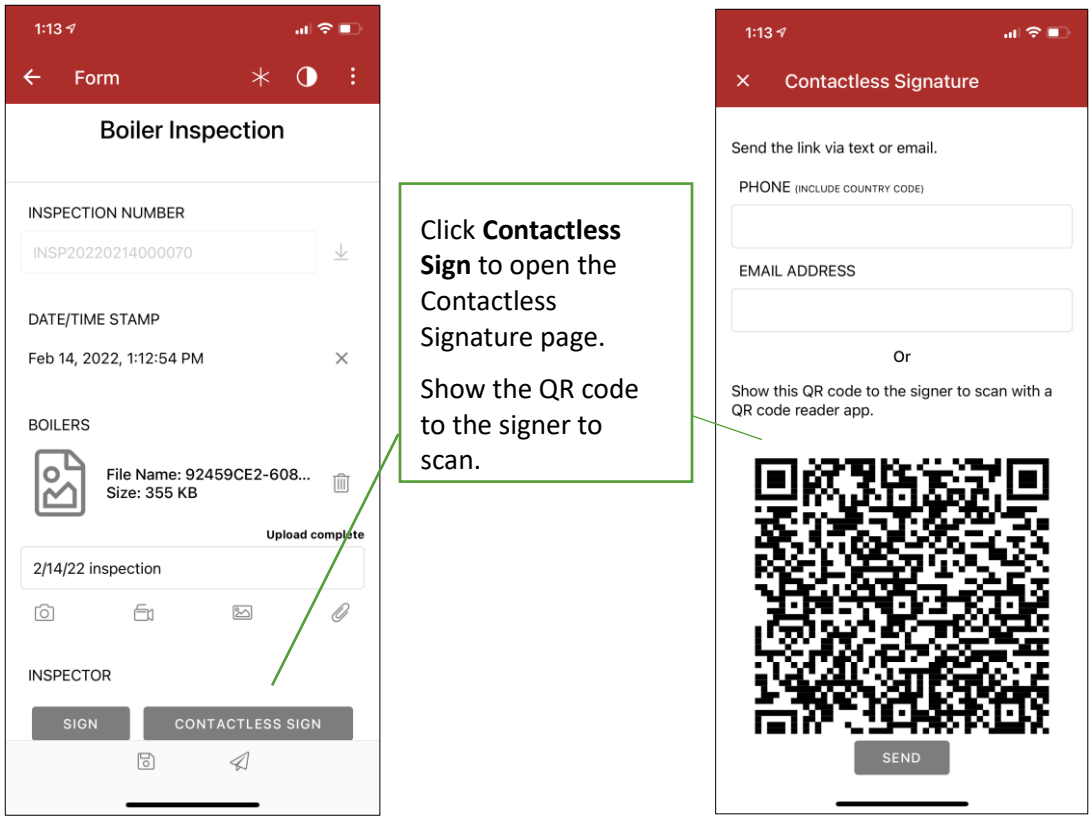
Contactless signatures provide a safe way for customers to sign forms without having to touch a tablet or smartphone. A contactless signature is completed one of two ways in FormsPro: by providing a QR code for a signer to scan or by sending a link to a signer.

Professional and Enterprise FormsPro licensed users can use a QR code to scan or send an email/text link to a signer. Standard license users can only use the QR code to scan.

Once the contactless signature is accepted and sent, the signature is applied to the form and the signature field, regardless of if the form is open in FormsPro. You can have multiple signatures on the same form, and they work with forms that are in envelopes. Any forms that were opened from TechPro can use contactless signatures while that form is open.

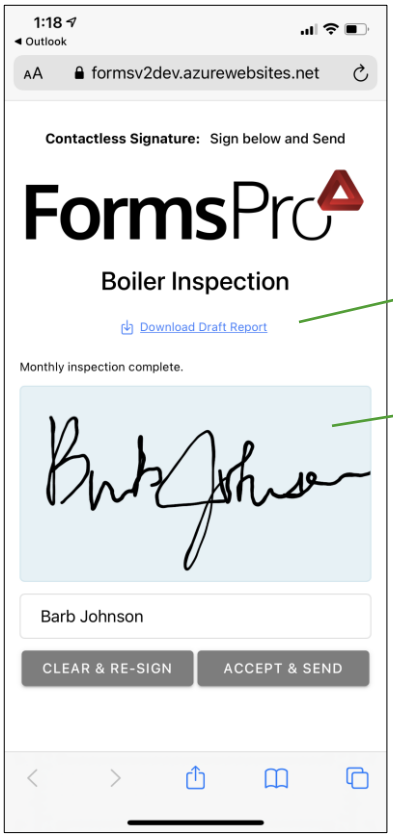
By QR Code:

1. On a form that has a Signature field, click **Contactless Sign** to open the Contactless Signature page.



2. Show the QR code to a signer so the signer can scan the code.

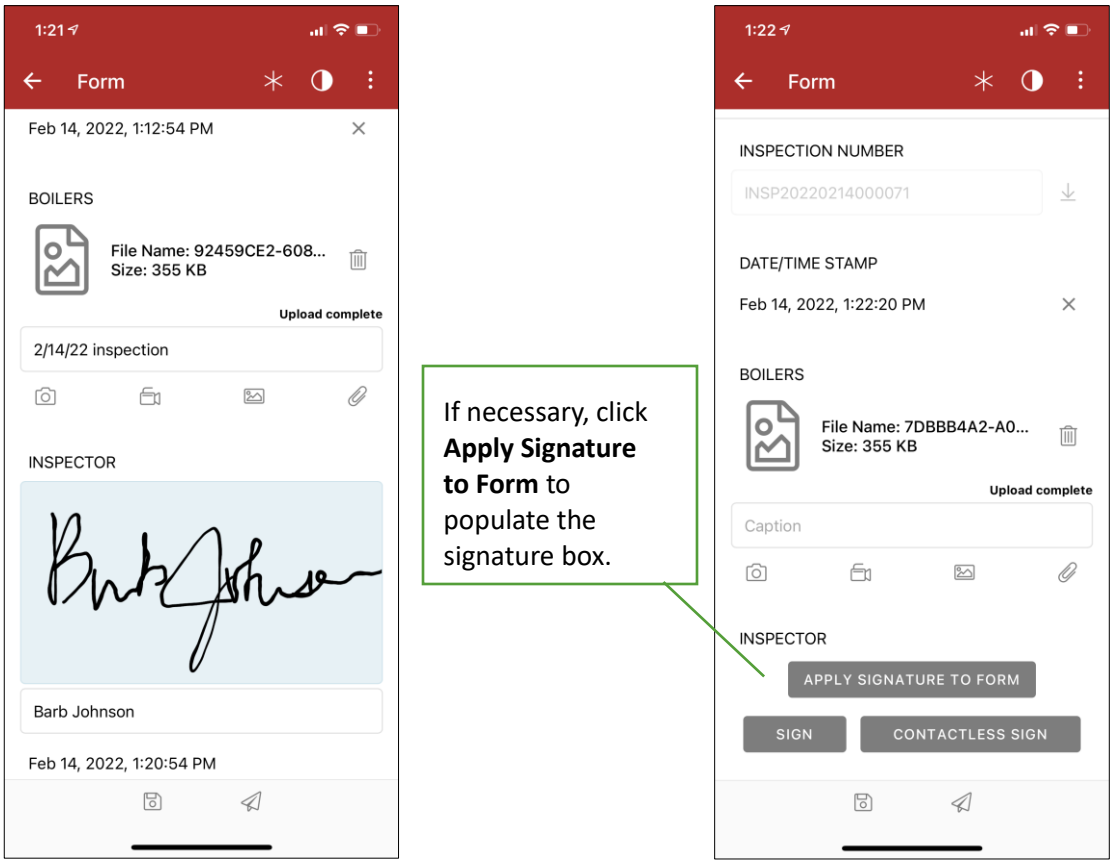
3. Once the code is scanned the Website QR Code notification appears on the device. Click the notification to open a webpage where the signature can be entered.



Click to view a preview of the report.

Enter your signature and click **Accept & Send** to send the signature.

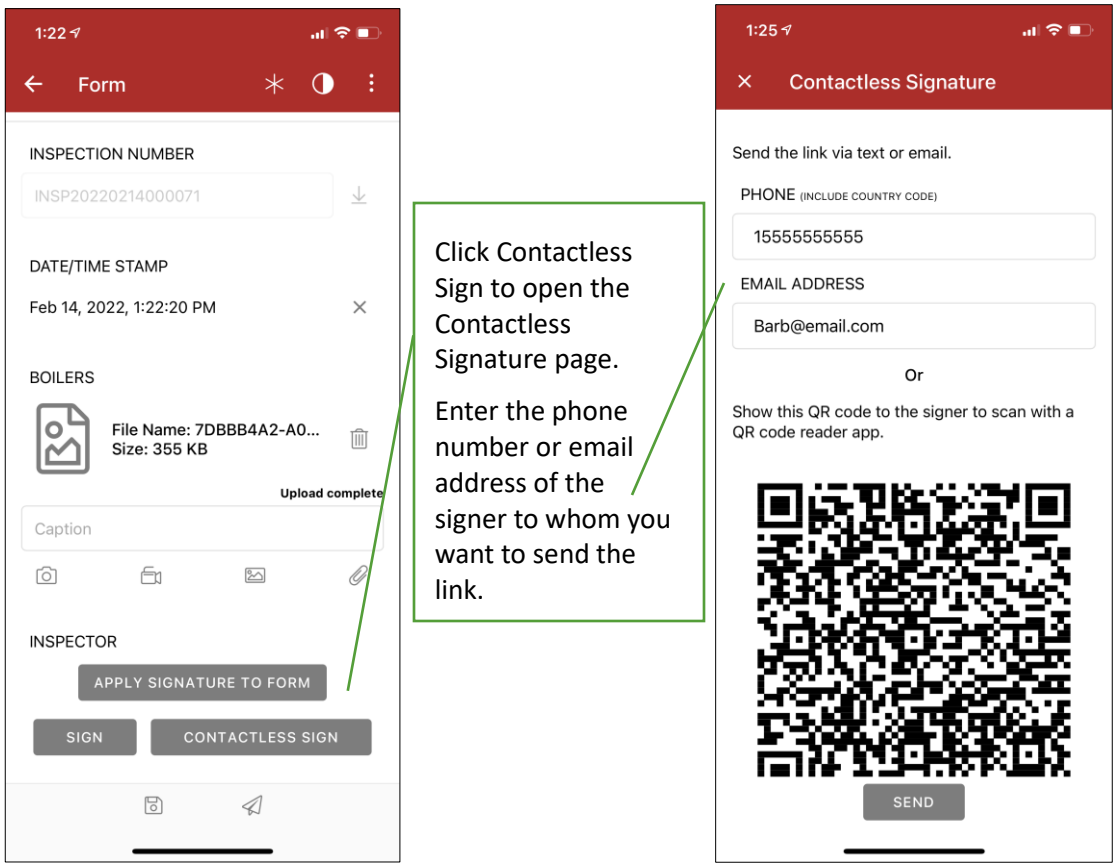
4. Click **Download Draft Report** to open a preview of the report as it exists thus far.
5. The signer signs the form and types their name in, then clicks **Accept & Send** to send the signature. A message appears saying the signature was sent.
6. If the user is still on the form, the signature populates the Signature box and their typed name. If the signature doesn't populate automatically or if they are on another form, click **Apply Signature to Form**.



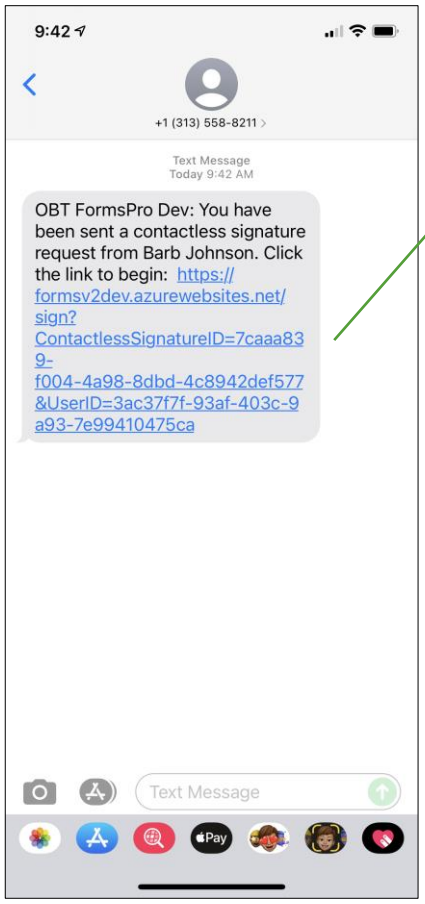
7. Continue processing the form as you normally do.

By a Link:

1. On a form, click **Contactless Sign** to open the Contactless Signature page.



2. Enter a phone number and/or email address to whom you want to send the contactless signature link.
3. Click **Send**.



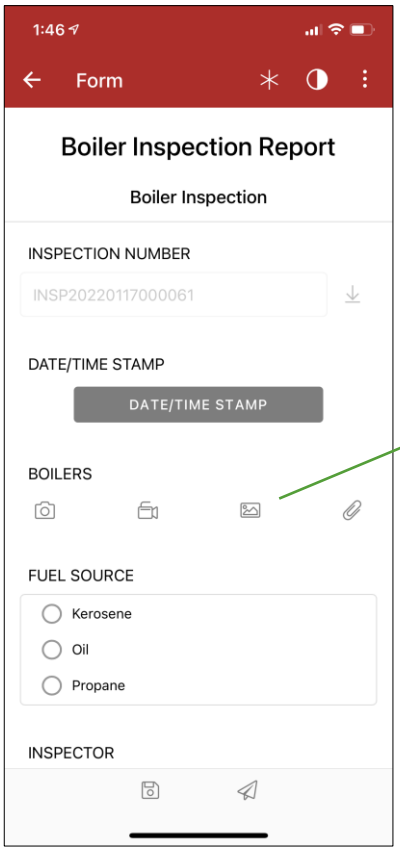
This is an example of a text message that is sent to the signer.

4. A text and/or email with a link to the contactless signature webpage is sent to the signer. Click the text or email to open a webpage where the signature can be entered.
5. Click **Download Draft Report** to open a preview of the report as it exists thus far.
6. The signer signs the form and types their name in, then clicks **Accept & Send** to send the signature. A message appears saying the signature was sent.
7. If the user is still on the form, the signature populates the Signature box and their typed name. If the signature doesn't populate automatically or if they are on another form, click **Apply Signature to Form**.
8. Continue processing the form as you normally do.

ATTACHMENTS AND IMAGES

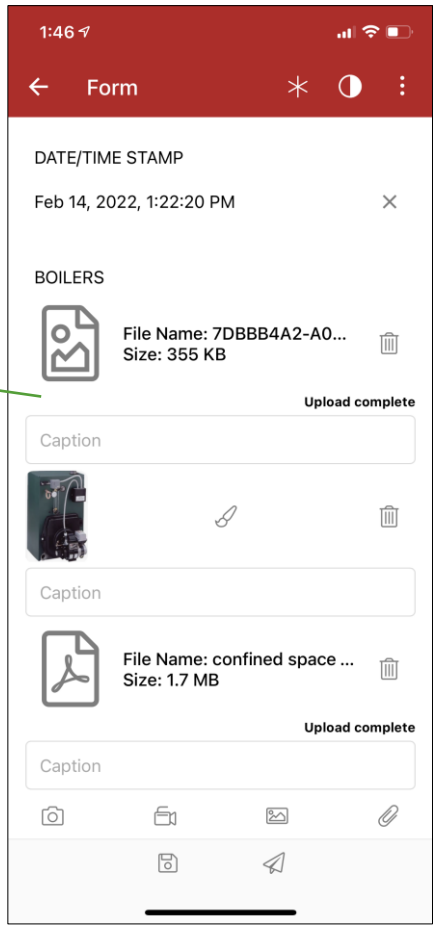
When the media input is added to a form you can associate important attachments with forms data that can include photos, videos, and other file types.

If you are online, you can also attach files from an online source such as One Drive or SharePoint (you may have to download the files first). After selecting the files, they are shown on your device in the order in which they were selected; they cannot be dragged into another order.



All input types were marked to be included on this form in the Edit/Images Attachments window.

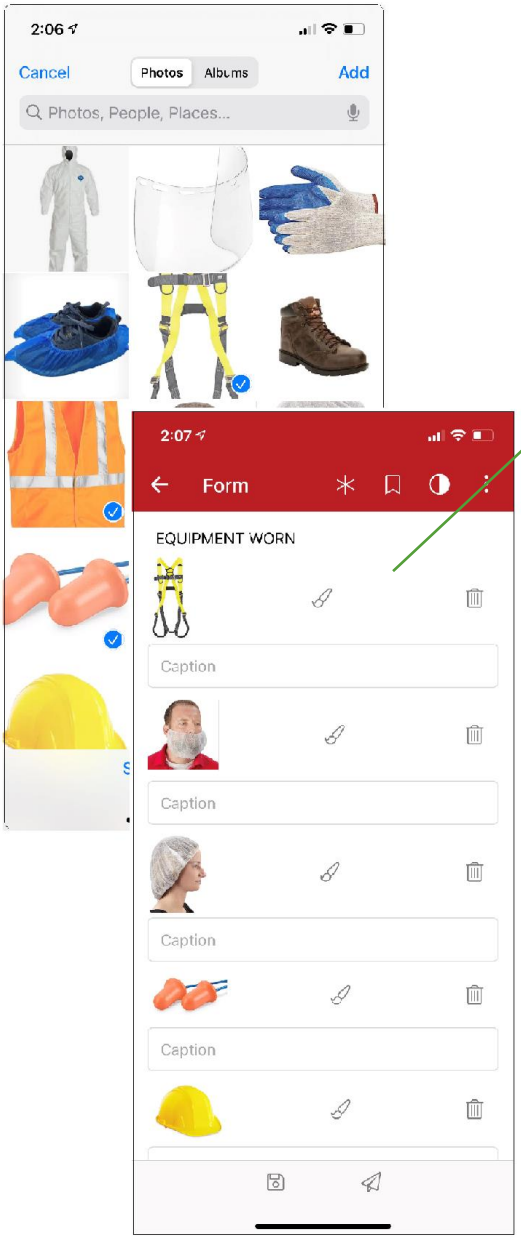
This form has several files and videos attached to it. The size of the file is displayed along with the original file name and extension.



On a report, file attachments show a link to the storage location of where the attachment is attached. This link can be removed from the report if it doesn't make sense to include to the recipient of the report.

If the **Exclude the Files as Attachments on Email** option is *not* marked in the Edit Media window, the email contains each attachment as an individual file.

When attaching images to a form, you can attach multiple images at one time. In the following illustration, four images were selected to include on the form.



Select images to include on the form, then click Add to attach them at one time.

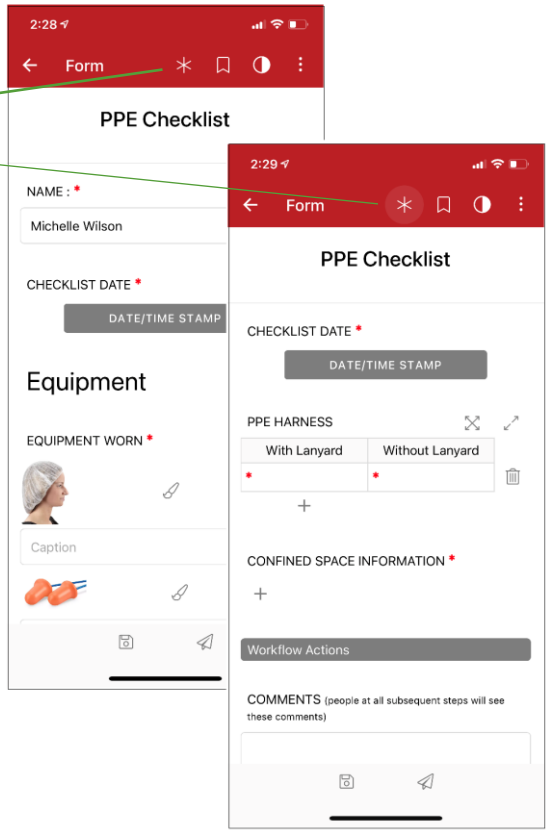
If you specify to include GPS coordinates and/or date/time information on an image, this information is displayed in a black box on the image. This information also prints on the report.

The GPS coordinates and time/date information are included on the image. This information can be displayed in the upper right or lower left corner.

REQUIRED FIELDS

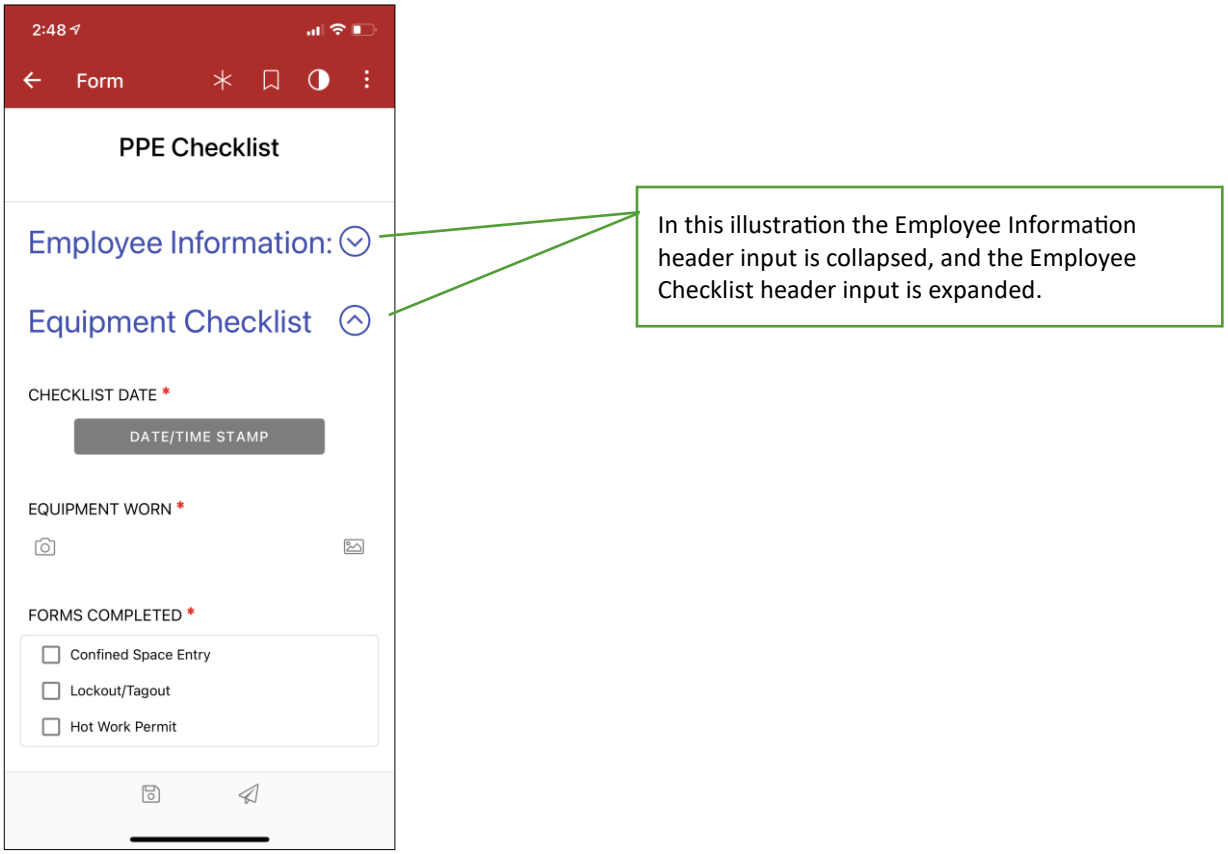
To view the required fields that have yet to be completed, click the asterisk button on a form to display those required fields. This can be very useful when you have multiple forms that list similar tasks, or to see what fields are remaining to complete before submitting. You can tick through the different tasks and see what is left to complete on a form.

Click the asterisk to display the incomplete required fields that remain on a form. The asterisk has a shaded circle around it when the form displays the incomplete required fields.



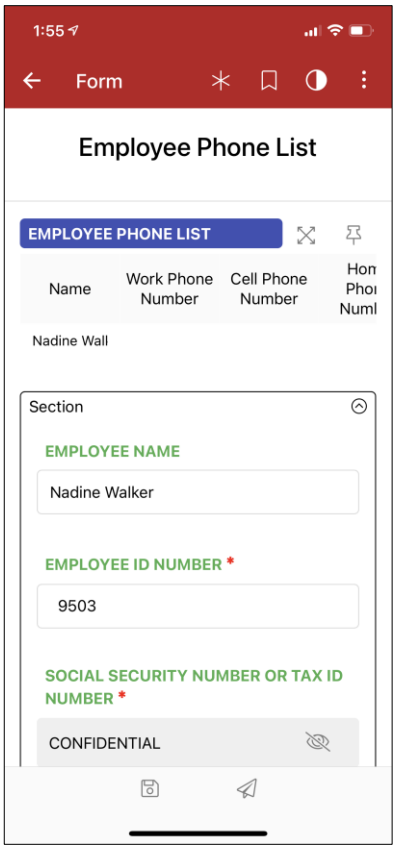
EXPAND/COLLAPSE AREAS

Expand and collapse paragraphs, embedded images, headers, and reusable sections. The label field in the Edit Paragraph and Edit Embedded Image windows “anchors” the expand/collapse button. Click the button that is next to the form’s header to expand/collapse the information following a header. When a form is saved, the next time it is opened it opens expanded or collapsed based on how it was saved.



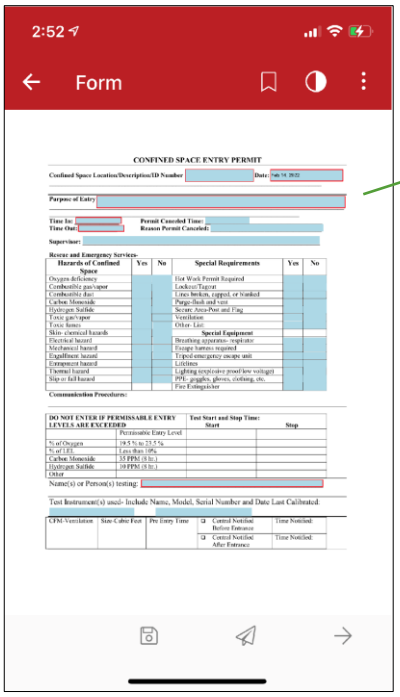
SECTIONS

When a section is added to a form the section is displayed with a box around it to indicate it’s part of a section, and not individual fields on a form. It appears under the header with the label that was entered in the Edit Section window.

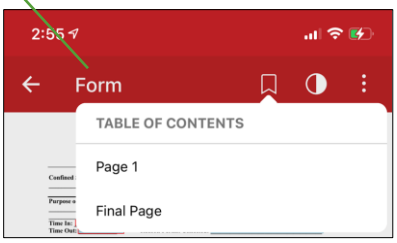


BASIC FORMS

Basic forms open with all the normal functionality of the app. The app uses pinch-to-zoom functionality to zoom in and out of the displayed content on the device. To use pinch-to-zoom, touch two fingers on the screen, and move them apart to zoom in, or move them together to zoom out. If the form has multiple pages the page names will display in the Table of Contents.

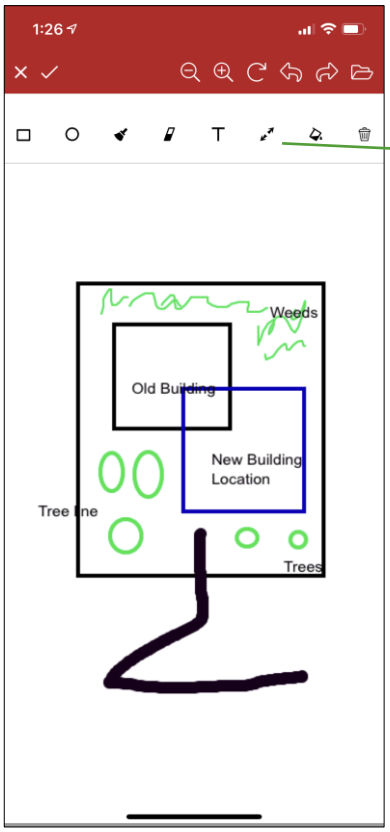


Required fields have a red border around them.
Since this form is only one page, the Table of Contents contains only the name of the first page and the final page since attachments are enabled for the form.



USING THE SKETCHPAD INPUT

Use the sketchpad input to add a drawing to a form. This can be helpful when adding a photo to a form won't work, such as a plot of land that you can't get a whole photo of. You can draw basic shapes as well as straight lines or arrows, add text, and draw freehand. Sketchpads can be in dynamic tables, conditional fields, and part of sections.



Scroll to the right to use all the sketchpad tools.

The sketchpad tools are located across the top of a form and include the following:

	Closes the sketchpad.
	Saves your drawing and closes the sketchpad.
	Zooms in on the sketchpad drawing.
	Zooms out on the sketchpad drawing.
	Rotates the sketchpad drawing.
	Cancels the last change made to the sketchpad drawing (undo).
	Reverses the results of the last undo action (redo).
	Allows you to select a photo from the Photo Library, take a photo, or browse for a photo.
	Selects the drawing.
	Crops the part of the drawing you have selected.
	Pixelates the portion of the drawing you have selected.

⁄	Draws a line. You can select the color (C), size (S) and shadow (SH) option by scrolling to the right.
↗	Draws an arrow. You can select the color and size and a shadow option by scrolling to the right.
▭	Draws a box. You can select the color, fill color, and size of the line by scrolling to the right.
○	Draws a circle. You can select the color and width by scrolling to the right.
	Draws a free form line. You can select the color and width by scrolling to the right.
	Free hand erases an area of the drawing. You can select the width by scrolling to the right.
T	Adds text to the drawing. You can select the color, bold, italic, and 3d shading by scrolling to the right.
	Resizes the drawing.

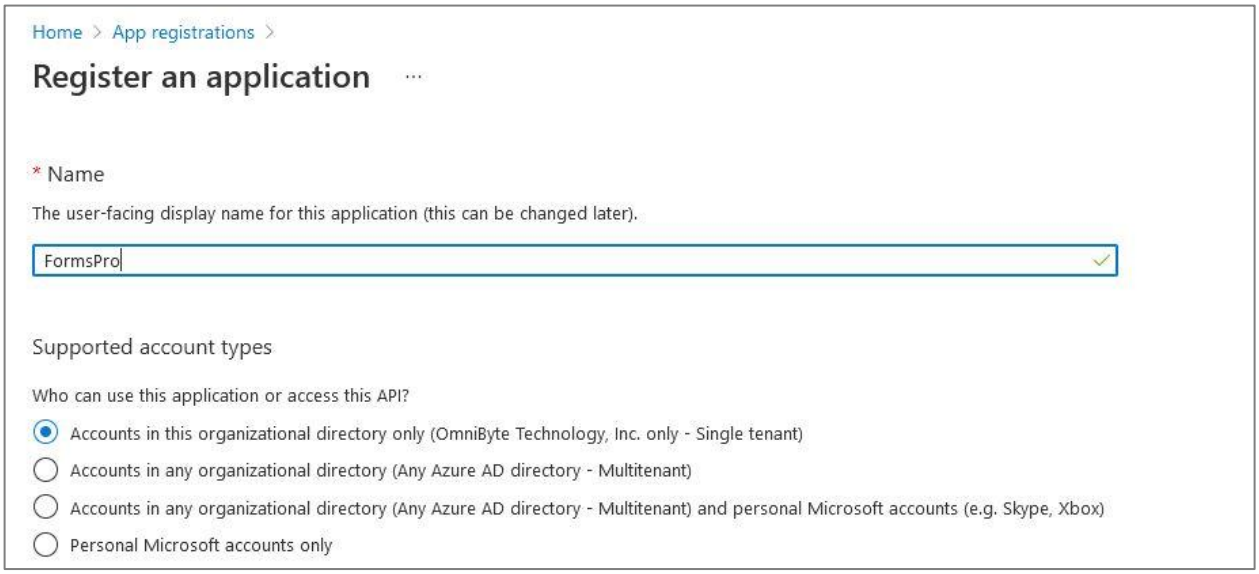
APPENDIX: AZURE ACTIVE DIRECTORY INTEGRATION

This appendix takes you through the steps necessary to create the app registrations for Azure Active Directory.

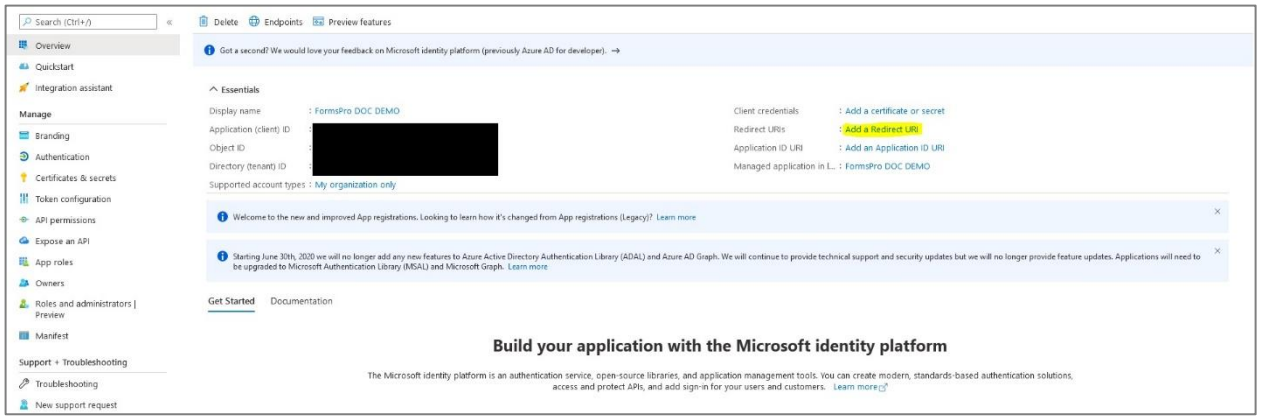
FORMSPRO REGISTRATION

1. Open Azure Active Directory via the Azure Portal (http://portal.azure.com).

2. Select **App registrations**.

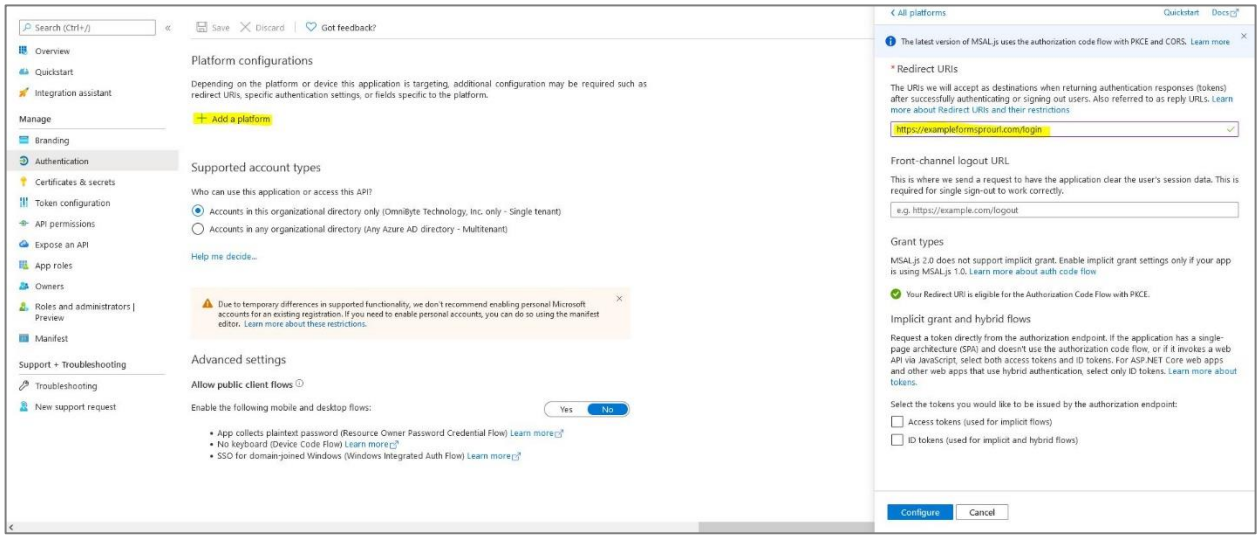


3. Enter **FormsPro** in the **Name** field.
4. From the **Supported account types** list, select **Accounts in this organizational directory only**.
5. Skip the **Redirect URI (optional)** section.
6. Click **Register**.
7. Once redirected to the registration detail page, click **Add a Redirect URI**.

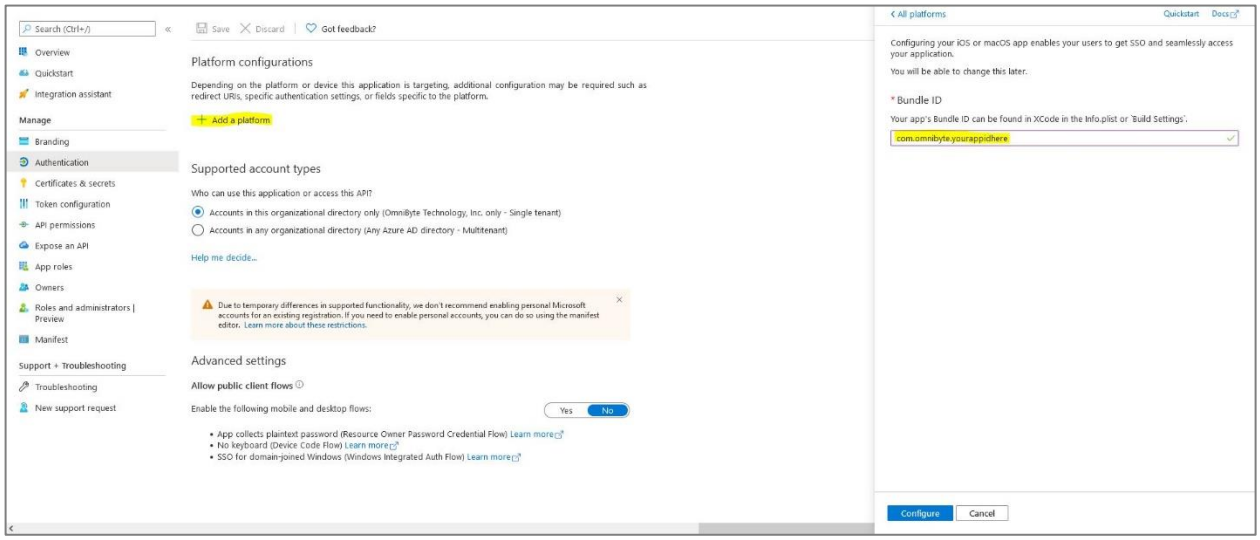


8. Click **+ Add a platform**.

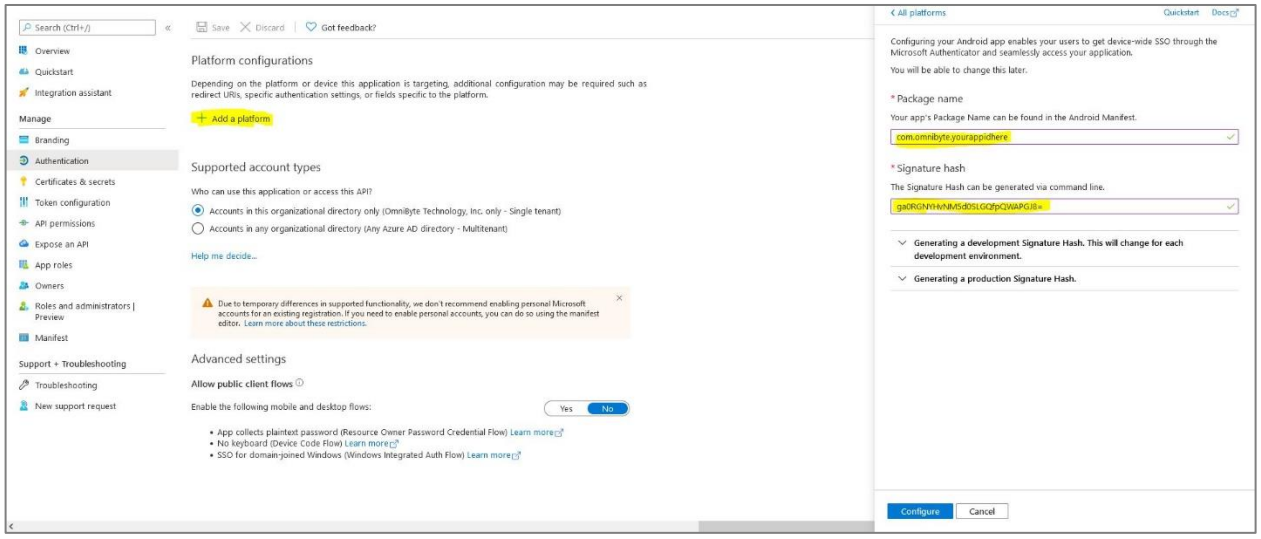
9. Add the following platforms with the corresponding values:
   - Single Page Application
     - Redirect URIs:
       - https://{formspro_admin_url}.com/login (Admin site)
       - https://{formspro_admin_url}.com/app/login (Browser app)



   - iOS/macOS
     - Package name:
       - com.omnibyte.forms
     - Redirect URI:
       - msauth.com.omnibyte.forms://auth



   - Android
     - Package name:
       - com.omnibyte.forms
     - Signature hash:
       - ga0RGNYHvNM5d0SLGQfpQWAPGJ8=

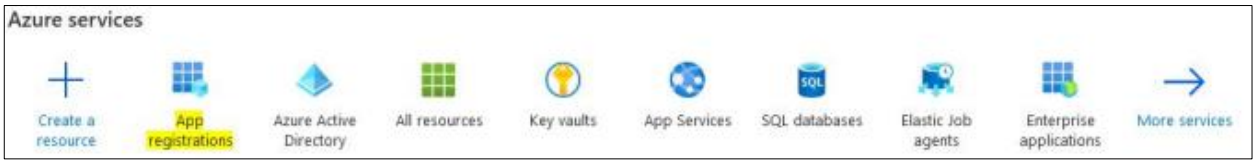


10. Click **Configure**.

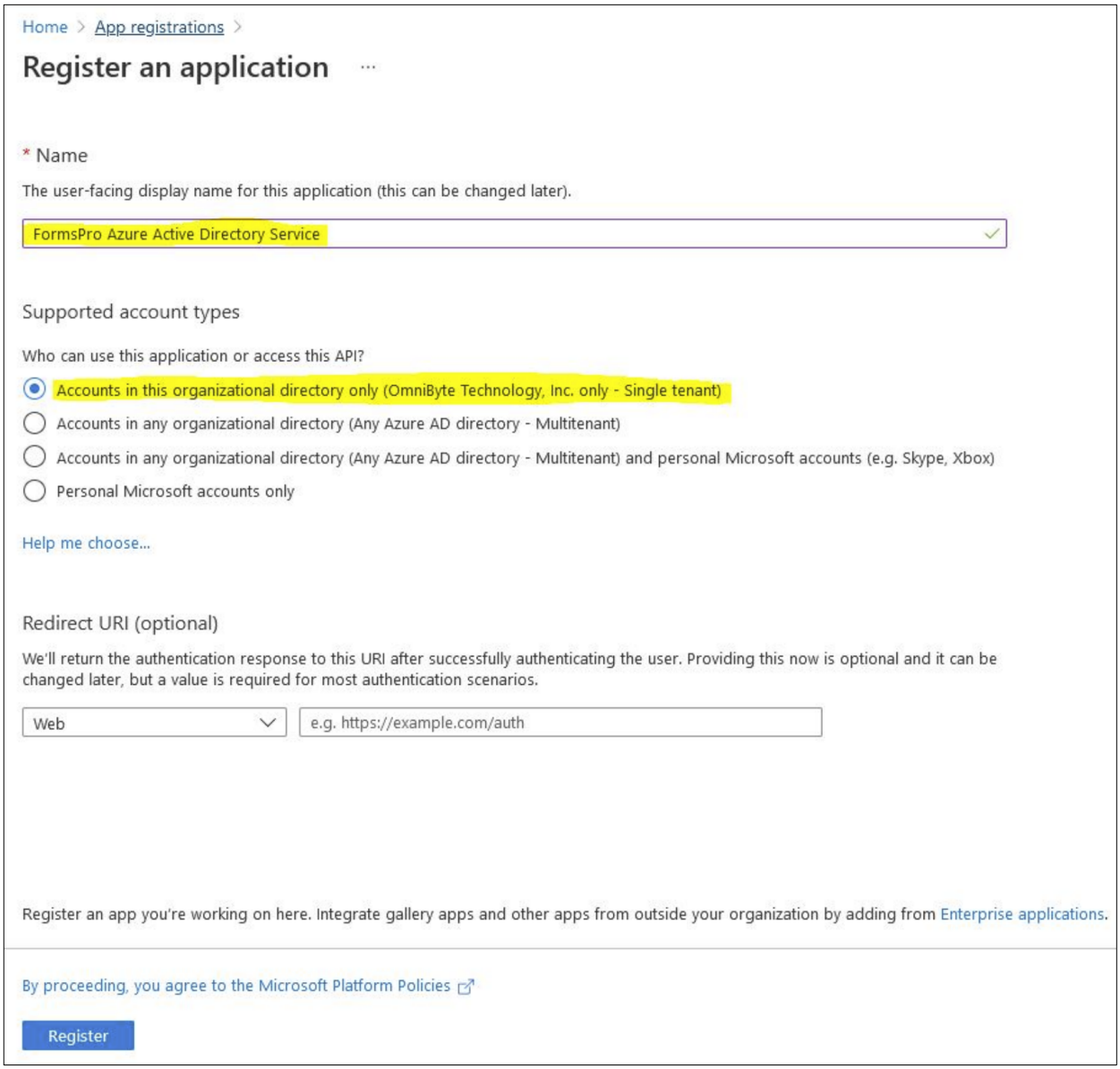
If your service is hosted locally, you only need to complete the FormsPro registration. However, you will need to add the client secret and API permissions steps specified in the FormsPro Azure Active Directory Service Registration section.

FORMSPRO AZURE ACTIVE DIRECTORY SERVICE REGISTRATION

1. Open Azure Active Directory via the Azure Portal (http://portal.azure.com).

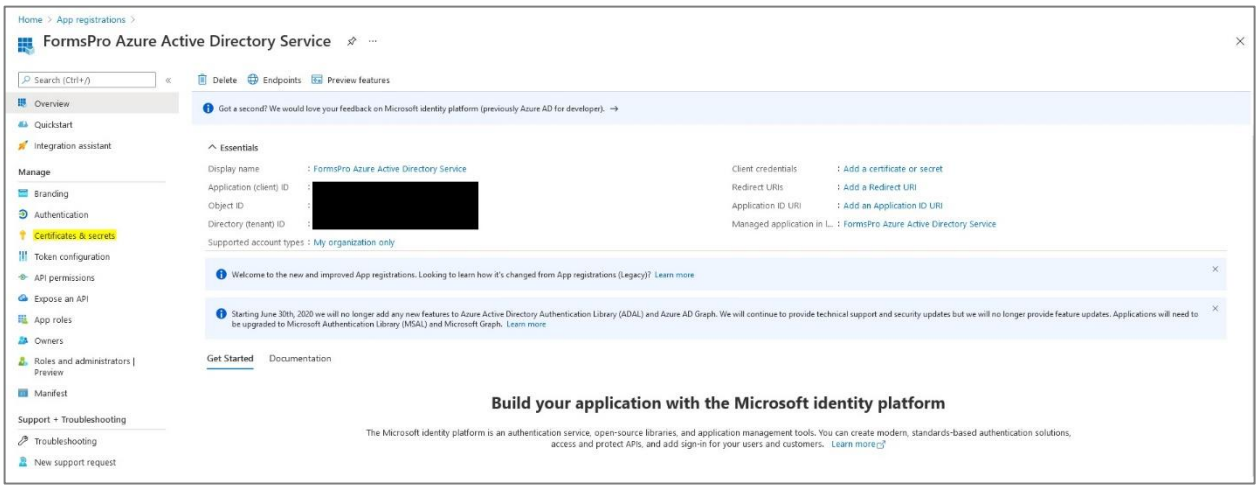


2. Click **App registrations**, then click + **New registration**.

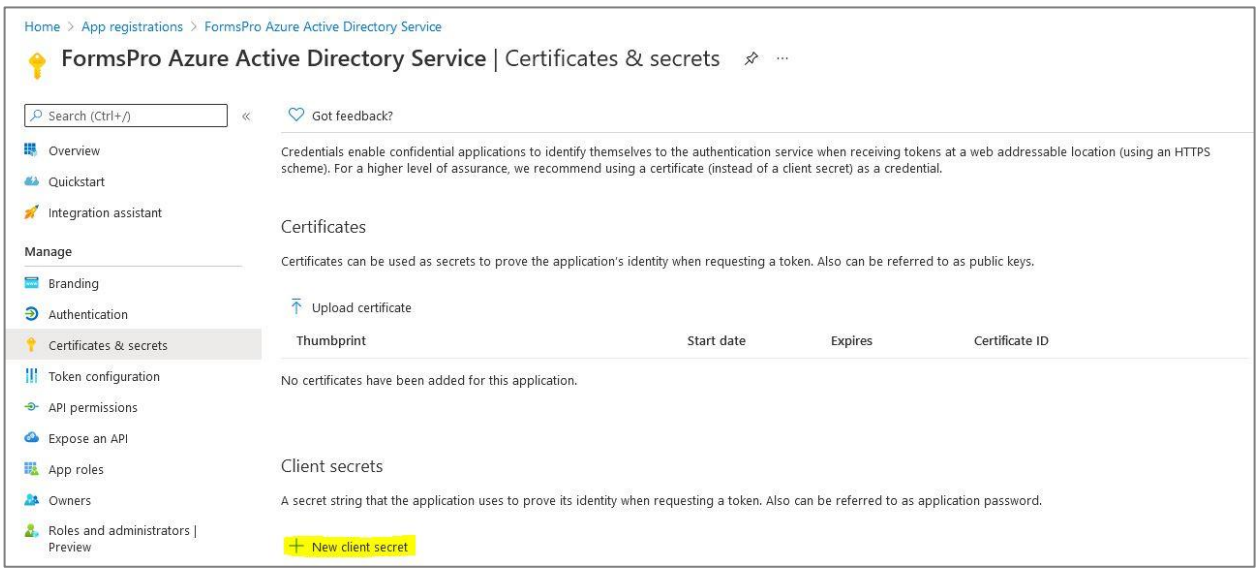


3. Enter **FormsPro Azure Active Directory Service** in the **Name** field.
4. From the **Supported account types** list, select **Accounts in this organizational directory only**.
5. Skip the **Redirect URI (optional)** section.
6. Click **Register**.

7. In the newly created FormsPro Azure Active Directory Service registration, from the menu on the left, select **Certificates & secrets**.

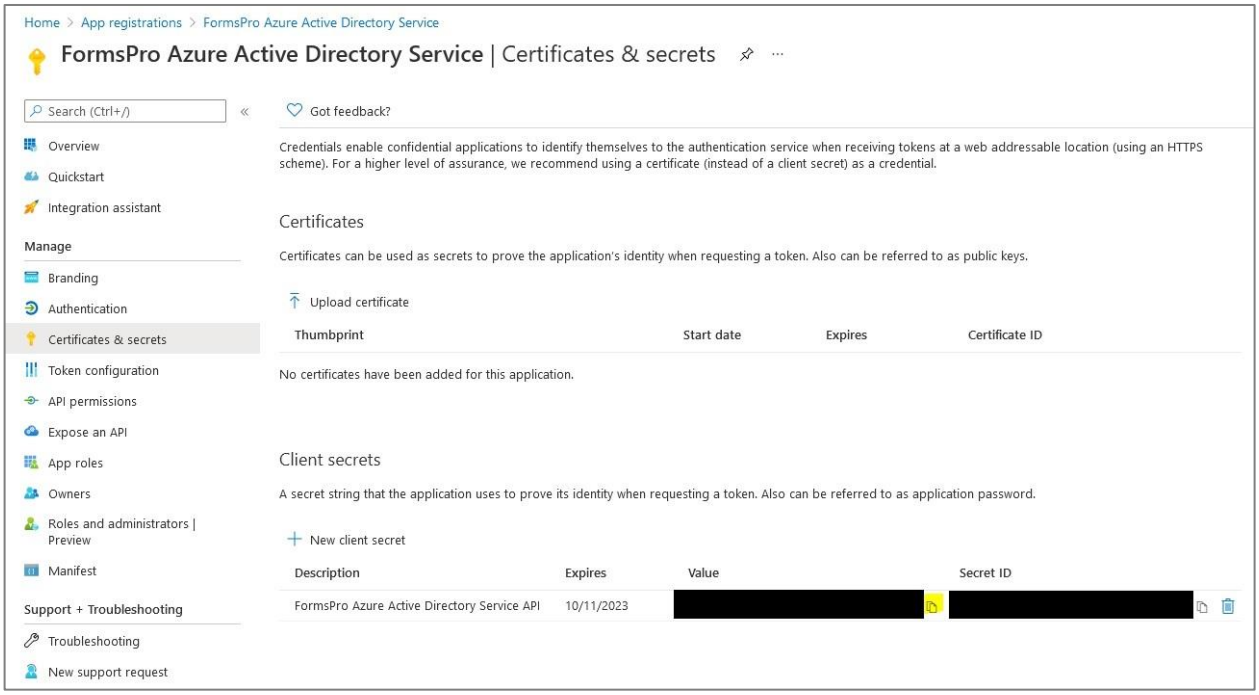


8. Click **+ New client secret**.

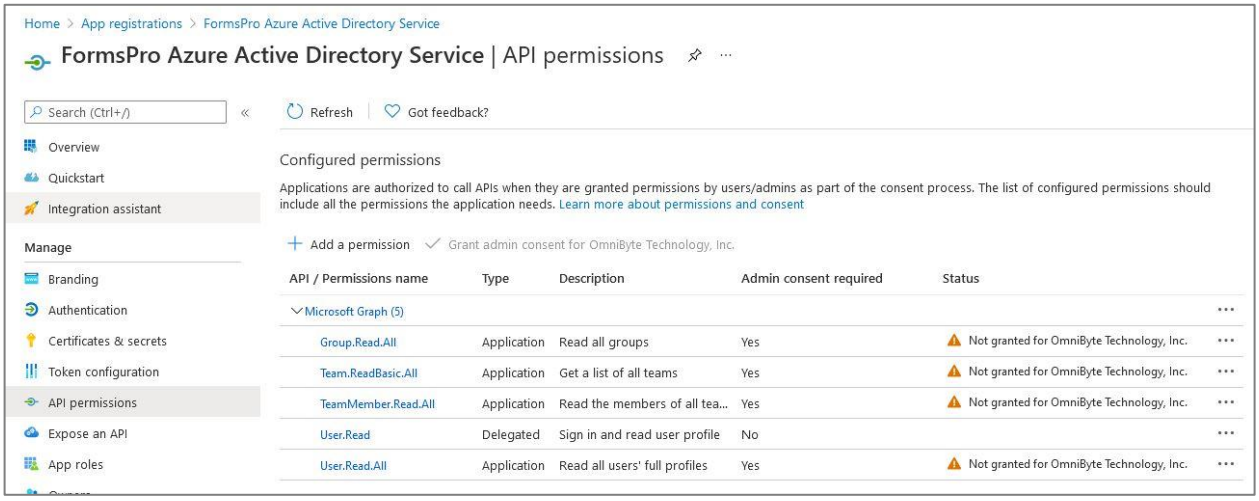


9. Create a new client secret.

10. In the **Description** field, enter **FormsPro Azure Active Directory Service API**.
11. From the **Expires** list, select **24 months**.
12. Click Add.
13. Click the copy icon to copy the generated secret and save it for later use.



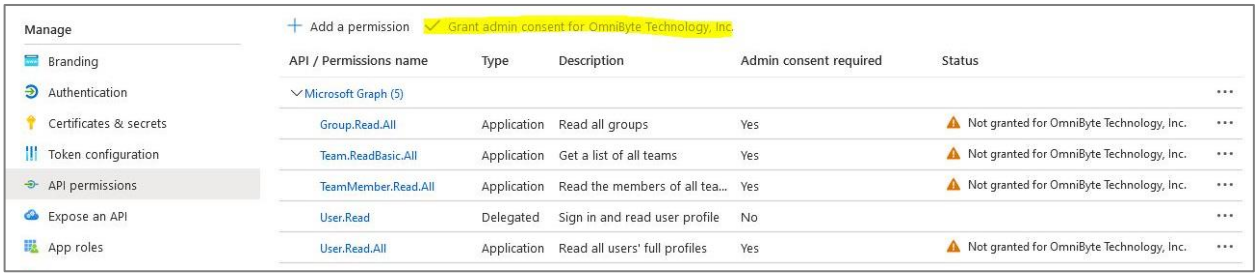
14. Next, from the menu on the left, select **API permissions**.



15. Grant the following permissions to Microsoft Graph:

Permission Name	**Permission Type**
Group.Read.All	Application
Team.ReadBasic.All	Application
TeamMember.Read.All	Application
User.Read	Delegated
User.Read.All	Application

16. As an admin user, grant admin consent for all permissions that require it.


Manage
Branding
Authentication
Certificates & secrets
Token configuration
API permissions
Expose an API
App roles
Add a permission
Grant admin consent for OmniByte Technology, Inc.
API / Permissions name
Type
Description
Admin consent required
Status
Microsoft Graph (5)
Group.Read.All
Application
Read all groups
Yes
Not granted for OmniByte Technology, Inc.
Team.ReadBasic.All
Application
Get a list of all teams
Yes
Not granted for OmniByte Technology, Inc.
TeamMember.Read.All
Application
Read the members of all tea...
Yes
Not granted for OmniByte Technology, Inc.
User.Read
Delegated
Sign in and read user profile
No
User.Read.All
Application
Read all users' full profiles
Yes
Not granted for OmniByte Technology, Inc.

ADDING REFERENCES

Add the following references to the App Registrations:

FormsPro Azure Active Directory Service

1. In the `appsettings.json` file, make sure the following object exists:

```
"AzureAD": {
  "Instance": "https://login.microsoftonline.com/",
  "Domain": "your_domain_here",
  "ClientId": "your_formspro_client_id_here",
  "TenantId": "your_tenant_id_here",
  "ClientSecret": "your_client_secret_here"
}
```

2. In the `msal-configuration.json` file, replace the following values:
   - {TENANT_ID} with the tenant ID of the organization
   - {CLIENT_ID} with the client ID of the FormsPro app registration

FormsPro

1. In the `web.config` file, add the following values:

```
<configuration>
  <appSettings>
    <add key="AzureADService" value="url_where_azure_ad_service_is_installed" />
    <add key="AzureADClientSecret" value="generated_client_secret_value"/>
  </appSettings>
</configuration>
```