What's New in doForms

doForms v. 4.1.1 (April 19, 2016)

Summary

NEW!

Report Builder.

The doForms Report Builder is a reporting tool that consolidates data from a single form (multiple submissions of a single form are allowed), exports that data in table format to Excel or PDF files, and then emails those files to one or more users. (See page 3 for details.)

NEW!

Enhanced Jump To Page action button.

Action buttons can now jump a user to relative page destinations in a form as follows: First, Top, Previous, Next, Bottom, Last. (See page 4 for details.)

NEW!

New Print action button for web forms.

Users can now create an action button that allows them to print a form from a browser. (See page 4 for details.)

NEW!

Advanced Date/Time formats.

The Date/Time field can now be configured to display the date and/or time in a variety of formats. (See page 5 for details.)

NEW!

Signature fields supported in tables and layout grids.

Table and layout grid containers can now contain signature fields. (See page 6 for details.)

NEW!

Is Empty/Is Not Empty relevance conditions.

Relevance conditions can now be set to Is Empty or Is Not Empty. (See page 6 for details.)

NEW!

Allow Edit option for Date/Time and Signature fields.

The Allow Edit option can be applied to Date/Time fields and Signature fields, allowing form users to edit these fields. (See page 7 for details.)

NEW!

Enhanced keyboard settings for data lookups.

To simplify data entry within forms, doForms has new settings that provide options for displaying the on-screen keyboard. (See page 8 for details.)

NEW!

Use text calculation as input source for Google Maps action button.

Users are now able to use a text calculation as an input source to launch Google Maps from an action button. (See page 9 for details.)

(continued…)

Summary (continued)

NEW!
Send custom report as a web link within an email.
This new setting is suitable for customers who are experiencing issues running very large custom reports and then emailing those reports. (See page 10 for details.)

NEW!
Compare separate numeric fields within a form.
Users may now compare the value of one numeric field to the value of another numeric field, to ensure they meet a condition. (See page 11 for details.)

NEW!
Dispatch scheduler enhancements.
When scheduling a dispatch, users may set the time in 15-minute intervals. (See page 12 for details.)

NEW!
Dispatch to web clients.
Users may now receive doForms dispatches via the web client. (See page 13 for details.)

NEW!
Choose One widget can be hidden in doForms mobile app in order to create an approval tool.
A web user who approves forms can insert a Choose One widget in the form and hide it from mobile users. (See page 13 for details.)

NEW!
Enhancements to mobile user search.
Web users may now search for mobile users by their mobile number, nickname, email address, or mobile group. (See page 14 for details.)

NEW!
Create your own form icons.
Users may now create their own icons and assign them to individual forms. Users may also save the icons to their icon library for future use. (See page 15 for details.)

NEW!
Ability to download lookup tables and custom report templates.
If a user cannot locate an original lookup table or custom report template document, they can now download a copy of it from the doForms web portal. (See page 16 for details.)

NEW!

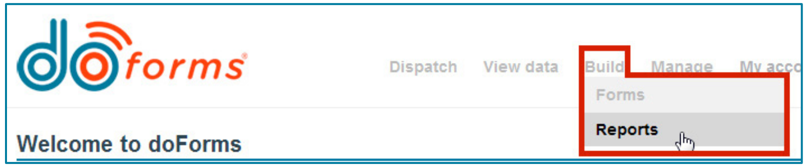
Report Builder

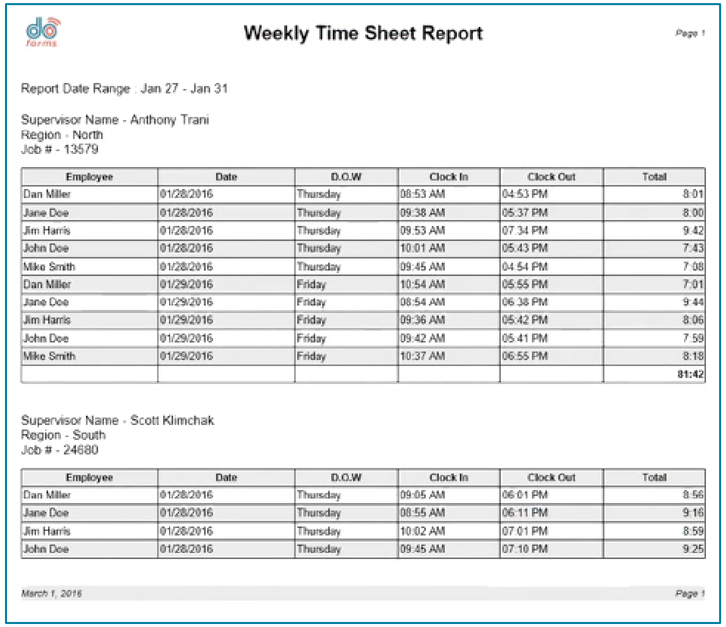
The doForms Report Builder is a reporting tool that consolidates data from a single form (multiple submissions of a single form are allowed), exports that data in table format to Excel or PDF files, and then emails those files to one or more users. For example, you can create timesheet reports, sales reports, or anything else that requires consolidation of data from multiple submissions of a single form.

Report Builder provides the ability to create single-instance reports, or recurring reports that can be scheduled using the built-in report scheduler.

Note that one credit will be deducted from your account for each report that is run.

To get started, please read the Report Builder documentation here, and watch the Report Builder video here.





Weekly Time Sheet Report Page 1

Report Date Range : Jan 27 - Jan 31

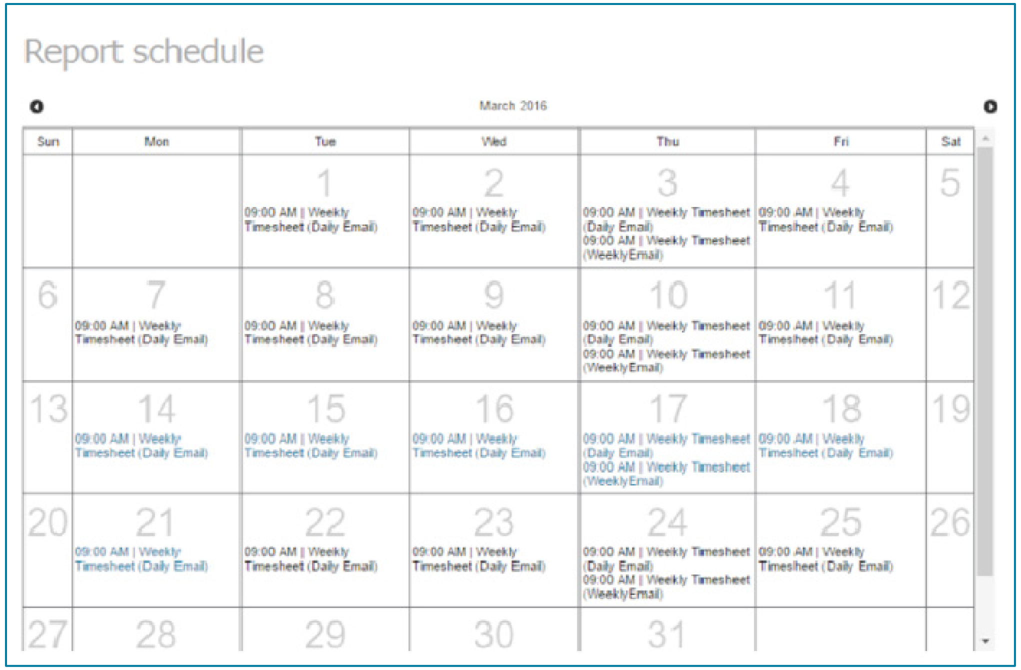
Supervisor Name - Anthony Trani
Region - North
Job # - 13579

Employee	Date	D.O.W	Clock In	Clock Out	Total
Dan Miller	01/28/2016	Thursday	08:53 AM	04:53 PM	8:01
Jane Doe	01/28/2016	Thursday	09:38 AM	05:37 PM	8:00
Jim Harris	01/28/2016	Thursday	09:53 AM	07:34 PM	9:42
John Doe	01/28/2016	Thursday	10:01 AM	05:43 PM	7:43
Mike Smith	01/28/2016	Thursday	09:45 AM	04:54 PM	7:08
Dan Miller	01/29/2016	Friday	10:54 AM	05:55 PM	7:01
Jane Doe	01/29/2016	Friday	08:54 AM	06:38 PM	9:44
Jim Harris	01/29/2016	Friday	09:36 AM	05:42 PM	8:06
John Doe	01/29/2016	Friday	09:42 AM	05:41 PM	7:59
Mike Smith	01/29/2016	Friday	10:37 AM	06:55 PM	8:18
					81:42

Supervisor Name - Scott Klimchak
Region - South
Job # - 24680

Employee	Date	D.O.W	Clock In	Clock Out	Total
Dan Miller	01/28/2016	Thursday	09:05 AM	06:01 PM	8:56
Jane Doe	01/28/2016	Thursday	08:55 AM	06:11 PM	9:16
Jim Harris	01/28/2016	Thursday	10:02 AM	07:01 PM	8:59
John Doe	01/28/2016	Thursday	09:45 AM	07:10 PM	9:25

March 1, 2016 *Page 1*



Report scheduler

What's New in doForms

NEW! Enhanced Jump To Page action button

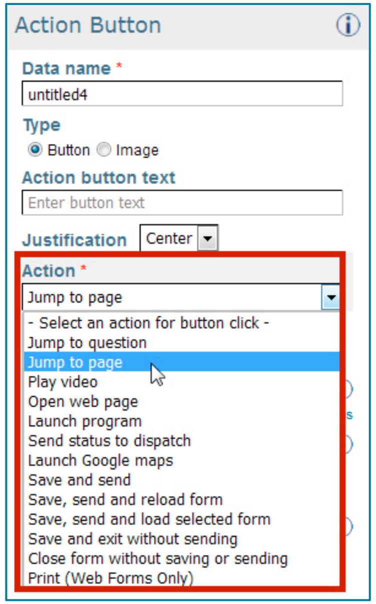
Action buttons can now jump a user to relative page destinations in a form as follows: First, Top, Previous, Next, Bottom, Last.

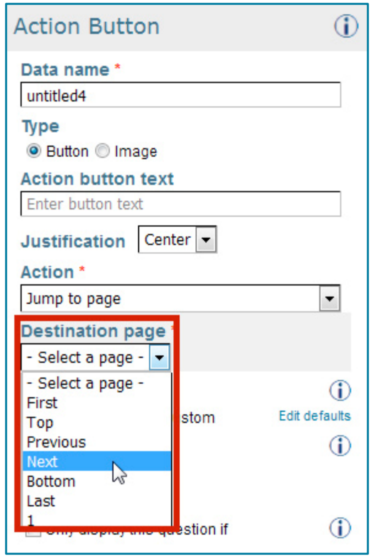
Previously, a **Jump to Page** action button could only jump form users to a specific page number in the form (i.e., Page 1, Page 2, etc.).

Now, in addition to jumping form users to specific page numbers, a **Jump to Page** action button can also jump form users to relative page destinations as follows: **First**, **Top**, **Previous**, **Next**, **Bottom**, and **Last**.

To insert a Jump to Page action button into a form:

1. Insert multiple pages in a form.
2. Insert an **Action Button** into a page, and then select **Jump to page** from the **Action** drop-down list (shown in first image, right).
3. Select a destination page for that action button from the **Destination page** drop-down list (shown in second image, right). Note that you may choose a relative page destination (these appear first in the list), or a specific page number (these appear after the relative page destinations).



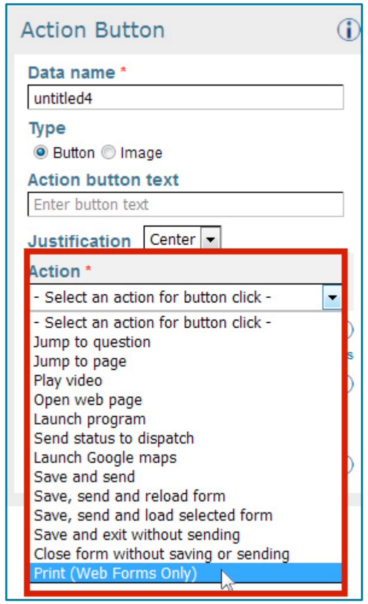


NEW! New Print action button for web forms

Users can now create an action button that allows them to print a form from a browser. This feature is only available when viewing a web form; the Print action button will not appear in mobile form view.

To insert a Print action button into a form:

1. Insert an **Action Button** into a form.
2. Choose **Print (Web Forms Only)** from the **Action** drop-down list (highlighted in red, below).



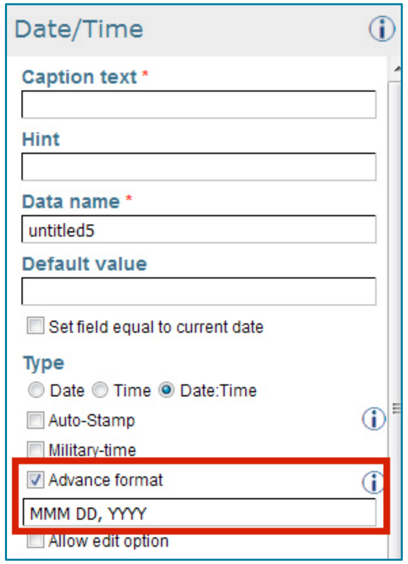
NEW!

Advanced Date/Time formats

The Date/Time field can now be configured to display the date and/or time in a variety of formats.

To format a Date/Time field with advanced date/time formats:

1. Select a **Date/Time** field in a form.
2. Select the **Advance format** checkbox to reveal the advanced format text field (highlighted in red, below).
3. Enter an advanced format string into the text field. Note that you may enter spaces, commas, colons, slashes, etc. in order to format the date and time to your liking [see formats and examples, right.]



Advanced date and time formats:

Year:

yy Two-digit value (e.g., 16)

yyyy Four-digit value (e.g., 2016)

Month:

MM Two-digit numerical value (e.g., 03)

MMM Three-digit alpha value (e.g., Mar)

Day:

dd Two-digit numerical value (e.g., 22)

ddd Three-digit alpha value (e.g., Tue)

Hour:

hh Two-digit numerical value represented by the time of day (e.g., 04)

Minute:

mm Two-digit numerical value represented by the time of day (e.g., 59)

Second:

ss Two-digit numerical value represented by the time of day (e.g., 59)

am or pm:

a Displays **am** or **pm** depending on time of day.

Examples:

MMM dd, yyyy	Mar 22, 2016
MMM dd, yyyy	Mar 22, 2016
MM/dd/yy	03/22/16
MM.dd	03.22
ddd MMM dd	Tue Mar 22
MM/yyyy	02/2016
hh:mm:ss a	04:59:59 pm
hh:mm a	04:59 pm
MM/dd/yy @ hh:mm a	03/22/16 @ 04:59 pm

Note: *Advanced date and time formats are case-sensitive.*

NEW!

Signature fields supported in tables and layout grids

Table and layout grid containers can now contain signature fields.

To insert a Signature field into a table or layout grid container:

1. Select a table or layout grid in the form builder.
2. Insert a **Signature** field into the table or layout grid.
3. A **Signature** field will appear in the mobile form (highlighted in red, below).

NEW!

Is Empty/Is Not Empty relevance conditions

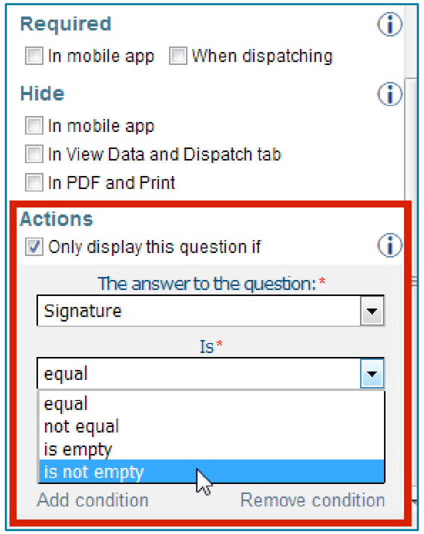
Relevance conditions can now be set to Is Empty or Is Not Empty.

You can now set up a relevance condition in a form so that it equals **Is Empty** or **Is Not Empty**.

For example, suppose you want to display a specific question after the form user enters a signature in the **Signature** field (e.g., "Does the customer want a printed copy mailed to them?"). In this case, you would set the form to display the question if the answer to the **Signature** question **Is Not Empty.**

To set a relevance condition to Is Empty/Is Not Empty:

1. Select a question or field in the form builder.
2. Select the **Only display this question if** checkbox.
3. Select the relevance condition using the **The answer to the question:** and **Is** drop-down lists (highlighted in red, below).



NEW!

Allow Edit option for Date/Time and Signature fields

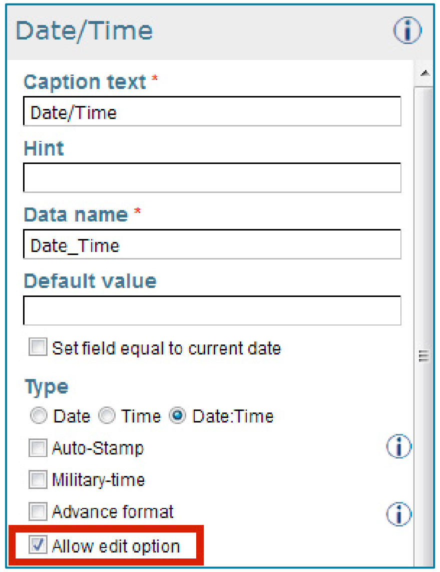
This new option can be applied to Date/Time fields and Signature fields, limiting the ability for form users to edit these fields after capturing data for the first time.

When creating **Date/Time** fields and **Signature** fields in forms, you now have the option of applying an **Allow Edit** option for them, as follows:

- If **Allow Edit** is not enabled, once the Date/Time field or Signature field is initially captured, it becomes read-only and cannot be edited.
- If **Allow Edit** is enabled, a form user can edit a Date/Time field or Signature field after initially capturing it.

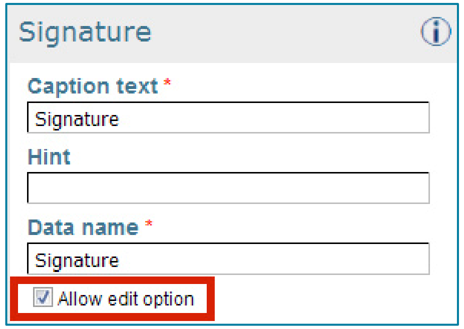
To apply the Allow Edit option for a Date/Time field:

1. Select a **Date/Time** widget in the form builder.
2. Under the **Type** options, select the **Allow edit option** checkbox (highlighted in red, below).



To apply the Allow Edit option for a Signature field:

1. Select a **Signature** widget in the form builder.
2. Select the **Allow edit option** checkbox (highlighted in red, below).



NEW!

Enhanced keyboard settings for data lookups

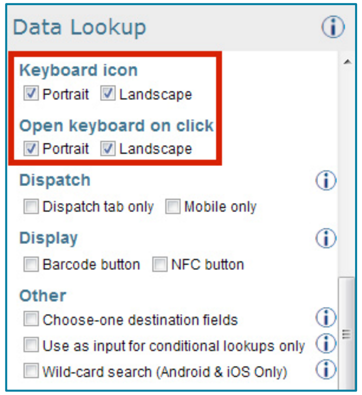
Previously, when performing a data lookup from within a form, users would have to select an item from the data lookup drop-down list in order to display the on-screen keyboard. doForms now has enhanced keyboard settings to either display or not display the on-screen keyboard when a user performs a data lookup. There is also a new eraser tool, which is available to the user when they selects a data lookup item within a form.

To apply keyboard settings that affect a data lookup within a form:

1. Select a **Data Lookup** field in the form builder.
2. The **Keyboard icon** option, which is available in both **Portrait** and **Landscape** orientations, can be modified as follows (see image, below):

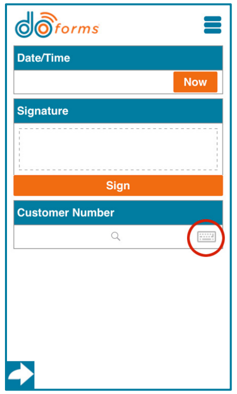
   a. If this option **is checked:** A keyboard icon (circled in red in first image, right) will appear in a form's data lookup field. This icon, when tapped, opens an on-screen keyboard.

   b. If this option **is unchecked:** When a user selects a data lookup item within a form, no on-screen keyboard will be available. However, an eraser icon (circled in green in second image, right) will appear next to the lookup item; tapping it will erase the data lookup item from the screen.
3. The **Open keyboard on click** option, which is available in both **Portrait** and **Landscape** orientations, can be modified as follows (see image, below):

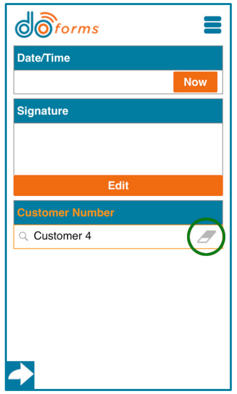


   a. If this option **is checked**, when a user taps the data lookup field (circled in red in third image, right), the on-screen keyboard will open.

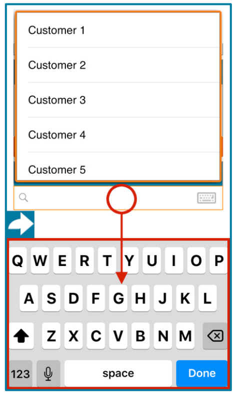
   b. If this option **is not checked**, when a user taps the data lookup field (circled in red in fourth image, right), only the data lookup drop-down list will open.



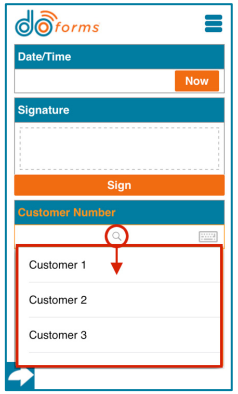
2a. Keyboard icon option is checked.



2b. Keyboard icon option is not checked. However, eraser icon appears when data lookup item is selected by user.



3a. Open keyboard on click option is checked.



3b. Open keyboard on click option is not checked.

NEW!

Use text calculation as input source for Google Maps action button

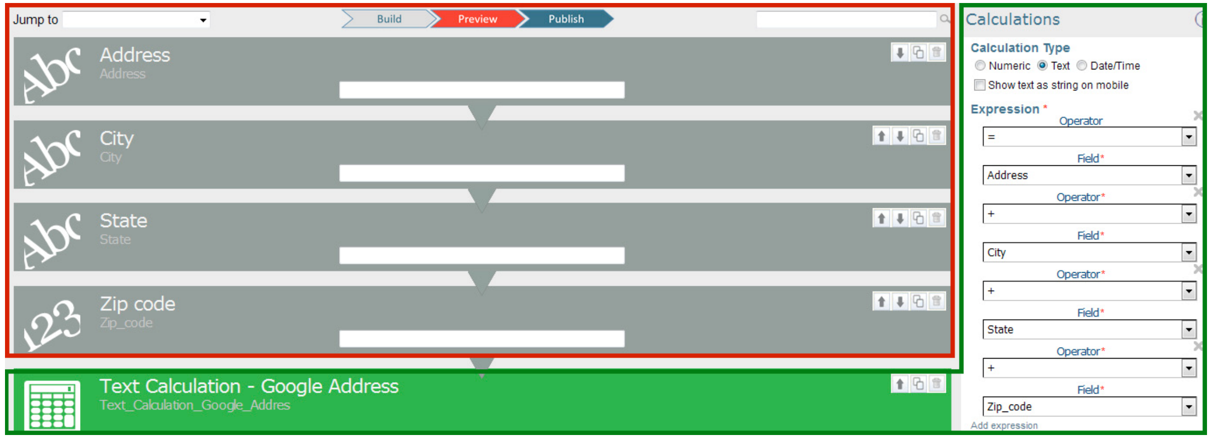
Previously, in order to use an action button to launch Google Maps, the input source had to be either a text field, lookup field, or location field. Now, a text calculation can be used as an input source.

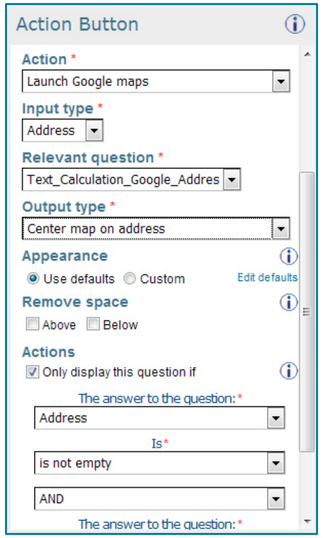
Previously, if you wanted to use a single text field as an input source to launch Google Maps from a form, that text field would need to contain the address, city, state, and zip code. Now, users can use a text calculation as an input source to launch Google Maps from a form.

For example, the user creates a text calculation that adds together four separate fields. address, city, state, and zip code. The user then inserts a Google Maps action button to the form, referencing the text calculation as its input source.

To use a text calculation as an input source to launch Google Maps from an action button:

1. Create four separate fields in a form: **Address**, **City**, **State**, and **Zip code** (highlighted in red in first image, below).
2. Create a **Calculation** field, select the **Text** radio button for its **Calculation Type**, and then create an **Expression** that adds together the first four fields you created (highlighted in green in first image, below).
3. Insert an Action button into the form, and then enter the following settings for it (see second image, below):
   - **Action:** Select **Launch Google maps**
   - **Input type:** Select **Address**
   - **Relevant question:** Select the name of the text calculation field that you created in Step 2, above.





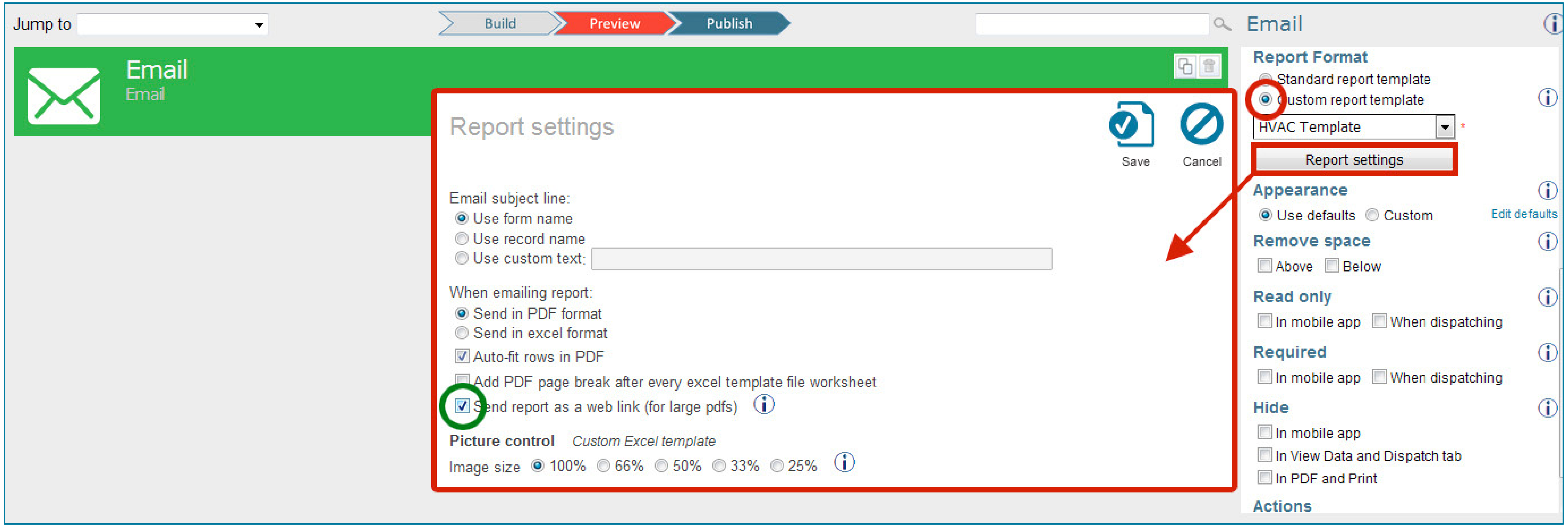
NEW!

Send custom report as a web link within an email

This new setting is suitable for customers who are experiencing issues running very large custom reports and then emailing those reports. This setting allows users to send custom PDF or Excel reports as a web link within an email rather than as an attachment. Note that the custom report must be a minimum size of 10MB to be sent as a web link.

To send a custom report as a web link within an email:

1. Select an **Email** widget within a form.
2. Select the **Custom report template** radio button, select the desired custom report from the drop-down list, and then click the **Report settings** button. The **Report Settings** dialog box will appear (highlighted in red, below).
3. Select the **Send report as a web link (for large pdfs)** checkbox (circled in green, below).
4. Click the **Save** button.



NEW!

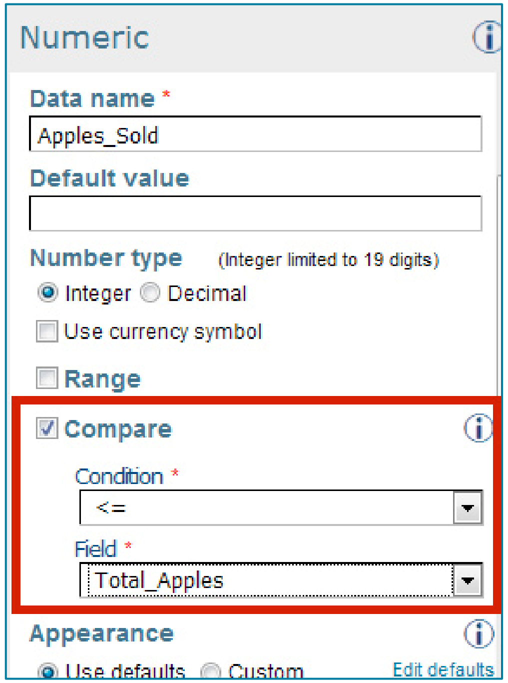
Compare separate numeric fields within a form

Users may now compare the value of one numeric field to the value of another numeric field, to ensure they meet a condition.

You can now compare separate numeric fields within a form to ensure they meet a mathematical condition (e.g., Less Than, Greater Than, Equal To, etc.). For example, suppose you want to ensure that one numeric entry in a form (e.g., Total Apples) is greater than or equal to another numeric entry (e.g., Apples Sold). You would use the **Compare** setting so that **Apples Sold** is less than or equal to **Total Apples**. If this condition is not met, then the user will not be able to submit the form.

To compare separate numeric fields within a form:

1. Create two separate numeric fields in a form.
2. Select one of the fields, and select the **Compare** checkbox (highlighted in red, right).
3. Select the appropriate mathematical condition (i.e., Greater Than, Greater Than or Equal To, Less Than, Less Than or Equal To) from the **Condition** drop-down list.
4. Select the comparison field from the **Field** drop-down list.



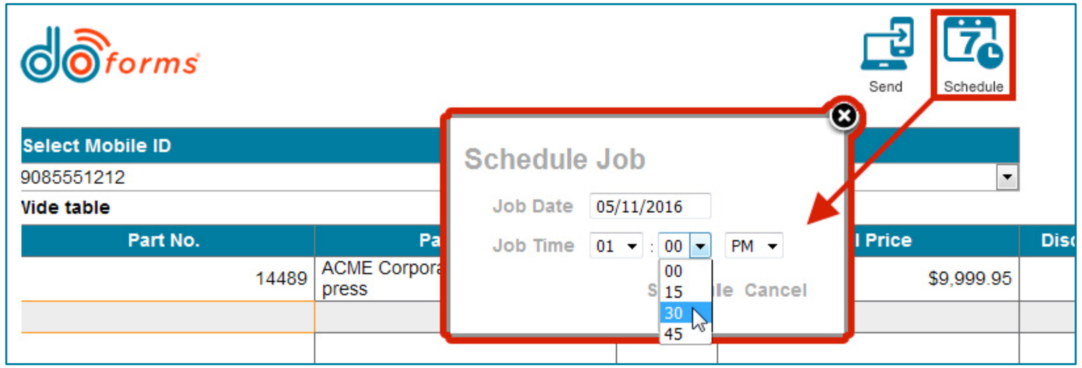
NEW!

Dispatch scheduler enhancements

When scheduling a dispatch, users may set the time only in 15-minute intervals. This update is in preparation for an upcoming release, which includes new dispatch scheduling enhancements.

To schedule a dispatch in 15-minute intervals:

1. Select the form you wish to dispatch and then create a dispatch. The form will open.
2. Select a **Mobile ID** and/or **Mobile User.**
3. Click the **Schedule** button to open the **Schedule Job** dialog box (highlighted in red, right).
4. Enter a **Job Date.**
5. Enter a **Job Time** using the drop-down lists. You may set the minutes drop-down to 00, 15, 30, or 45.
6. Click **Schedule** to schedule the dispatch.



NEW!

Dispatch to web clients

Users may now receive doForms dispatches via the web client.

Note the following regarding dispatches to web client:

1. If a doForms dispatch is received by a mobile device, that same dispatch may not be synched with the web client.
2. Once a user logs into the web client, they will begin receiving dispatches to the web client only, and not to the mobile device. The user must log out of the web client to begin receiving dispatches to the mobile device.
3. Forwarding capabilities will be added in a future doForms release.

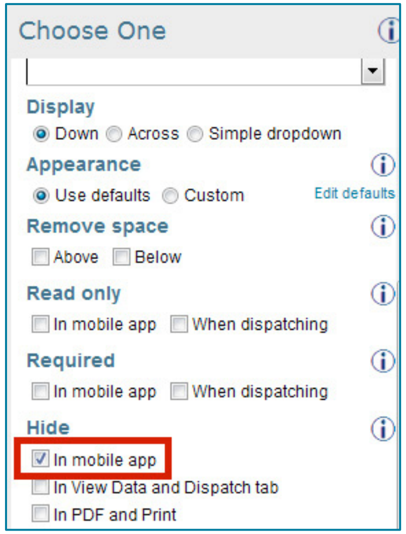
NEW!

Choose One widget can be hidden in doForms mobile app in order to create an approval tool

A web user who approves forms that are submitted by mobile users may wish to create an approval tool that only they can view on the web. To do this, the web user can insert a Choose One widget in the form and hide it from mobile users. This way, the Choose One field will appear when web users view data on the doForms web portal, but remains hidden in the mobile form.

To insert a hidden Choose One widget in a form:

1. Select a **Choose One** widget within a form.
2. In the **Hide** settings, select the **In mobile app** checkbox (highlighted in red, right).



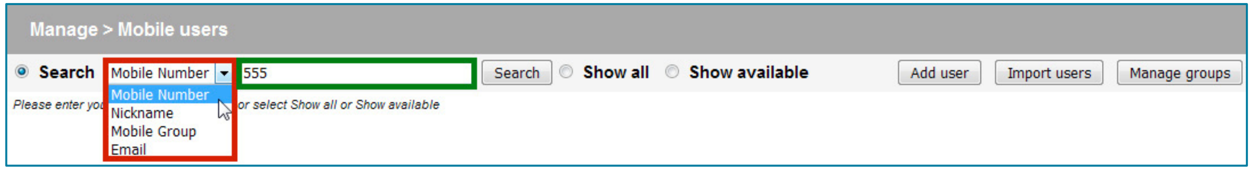
NEW!

Enhancements to mobile user search

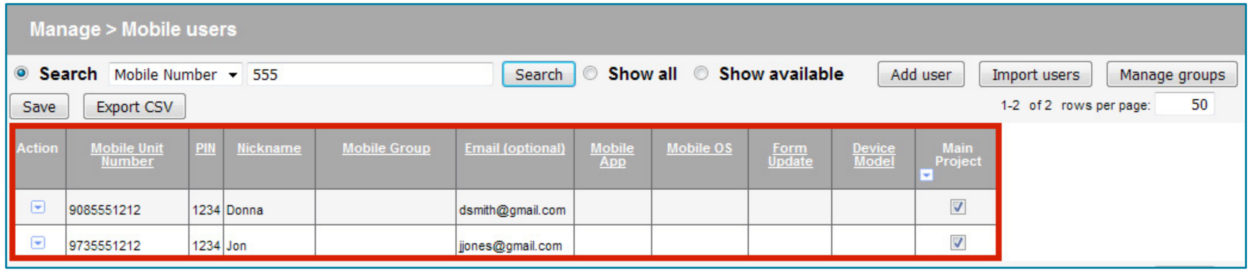
Web users may now search for mobile users by their mobile number, nickname, or email address.
Web users may also search for and display all users in a particular mobile group.

To search for mobile users by their mobile number, nickname, email address, or mobile group:

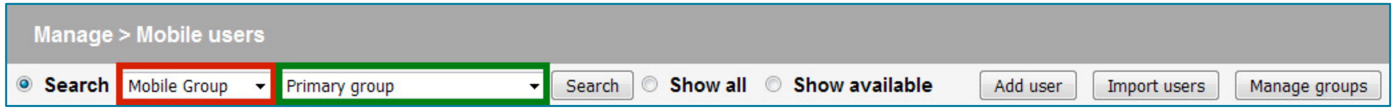
1. Open the doForms web portal.
2. Go to **Manage > Mobile users. The Manage Mobile user** screen will appear:



3. Select a search criteria from the drop-down list (highlighted in red, above). In the example above, the user wishes to search by **Mobile Number.**
4. Enter a search string in the search box (highlighted in green, above). In the example above, the user wishes to search for all mobile numbers that contain **555.**
5. Click the **Search** button to display results. The search example described above has resulted in the following (highlighted in red, below):



6. To search for and display all users in a mobile group, select **Mobile Group** from the drop-down list (highlighted in red, below), select the desired mobile group from the available groups displayed in the second drop-down list (highlighted in green, below), and then click the **Search** button.

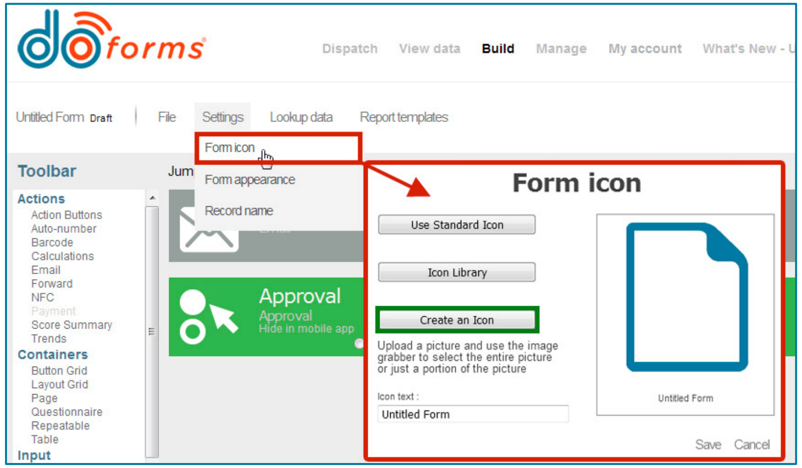


Create your own form icons with the new pic grabber tool

Users may now create their own icons and assign them to individual forms. Users may also save the icons to their icon library for future use.

To create a form icon:

1. Open or create a new form.
2. Select **Settings > Form icon** to open the **Form icon** dialog box (highlighted in red in first image, right).
3. Click the **Create an Icon** button (highlighted in green in first image, right).
4. The icon window will appear (shown in second image, right). Click the **Browse** button to browse for and choose an existing image file to use as a starting point for your new icon (highlighted in red in second image, right).
5. The chosen image will appear. Using the pic grabber tool, drag the outline handles to select the area of the image that you wish to use as your new icon (highlighted in green in second image, right). Note that your selection will be re-sized to 187 pixels x 187 pixels, which is the size of all doForms icons.
6. To save this new icon for future use, click the **Save icon into the icon library** checkbox (highlighted in pink in second image, right).
7. Click **Save** to save all changes. Your new icon will now appear in the icon library (highlighted in red in image below).



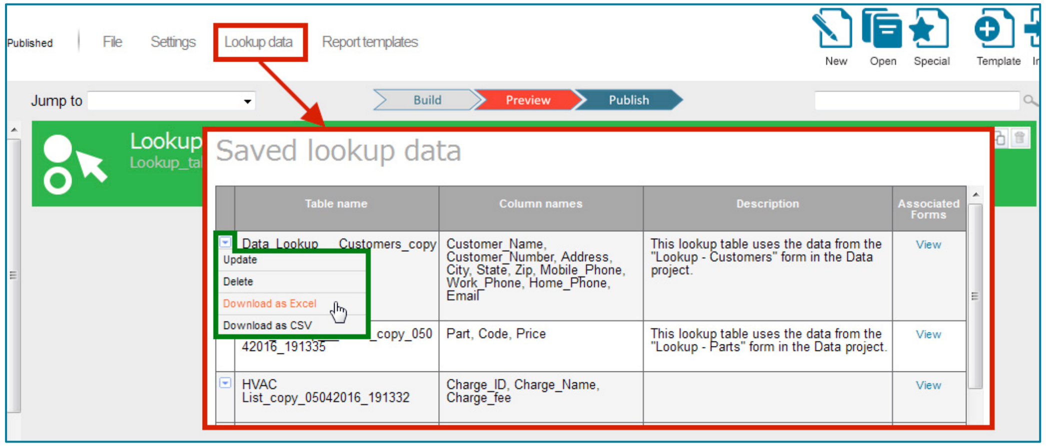
NEW!

Ability to download lookup tables and custom report templates

In order to update either a lookup table or custom report template, a user must make edits to an original document and then re-upload it to the doForms web portal. In the past, the user had to locate the original document on a local drive, and then re-upload it. With this new update, if the user cannot locate the original document, they can download a copy of the document from the doForms web portal.

To download a lookup table from the doForms web portal:

1. Open the doForms web portal and open a form.
2. Select **Lookup data** to open the **Saved lookup data** dialog box (highlighted in red in image below).
3. Click the drop-down arrow next to the desired lookup table, and then click either **Download as Excel** or **Download as CSV** (highlighted in green in image below).
4. Follow the prompts to save the Excel or CSV file to a local drive.



To download a custom report template from the doForms web portal:

1. Open the doForms web portal and open a form.
2. Select **Report templates** to open the **Saved report templates** dialog box (highlighted in red in image below).
3. Click the drop-down arrow next to the desired report template, and then click **Download** (highlighted in green in image below).
4. Follow the prompts to save the file (Excel only) to a local drive.