Summary

NEW!

Variables   (See page 2 for details.)

- Device specific, user or corporate defined variables.

NEW!

Report Builder Enhancements   (See page 4 for details.)

- New report formats and support for custom Excel templates

NEW!

Read Only, Required, Hide Enhancements   (See page 5 for details.)

- Control how fields behave when a form is forwarded to another user.

NEW!

Action Button Enhancements   (See page 5 for details.)

- Ability to switch to a new form while currently filling out another form
- Ability to switch to a saved form while currently filling out another form

NEW!

Zebra Device Support   (See page 6 for details.)

- Support for Zebra Handheld devices with 2D laser scanning (TC56/20/75X)
- More info: https://www.doforms.com/news/zebra-handheld-scanners-partnership/

NEW!

Barcode and Text Field Enhancements   (See page 6 for details.)

- Ability jump to next field after a scan is successful
- Ability to suppress the keyboard on a text field

NEW!

Default Project Setting   (See page 6 for details.)

- Ability to define the startup project when your doForms mobile app opens.

NEW!

Form Priority Sequence Number   (See page 7 for details.)

- Ability to set a sequence to control the order in which form icons appear on your mobile app

NEW!

New Slider option in Choose One   (See page 7 for details.)

- Ability to use On/Off sliders with a variety of underlying values

NEW!

Data Lookup Enhancement   (See page 8 for details.)

- Ability to automatically select a value from a lookup data source based on a lookup condition.

NEW!

Form Folders   (See page 8 for details.)

- Ability to add items from your menus directly into your form menu.

NEW!

Proof Of Delivery Widget

- Contact doforms for more information (855) DOFORMS - *(855) 363-6767*

NEW!

Variables

Variables eliminate the need for people to have to continually type in common information unique to them or the location of the device. As an example, if you built a form that requires the user to type in his/her name and employee ID each time they fill out a form, with variables you can ask them for their name and Employee ID when they first load doForms. You can then reference those values from with in your form using the calculation widget. Variables are configured by account so you set the questions and how you want then answered. Mobile users can also edit their information if given permission and variable values can be managed remotely via the portal so that devices can be configured with the correct data for each user.

Creating variable questions

1) Log into the doForms portal and go to Manage → Account Settings → Manage user variables

2) On the top bar you will notice there is 2 sections, one for web user variables and one for mobile user variables

3) Select which type of user you would like to define variables for and click the pen icon to begin adding questions by entering a caption.

4) Each question can also have a hint and a specified type. The specified type is to determine what type of field that specific questions is which will control how answers are entered, validated or formatted.

5) A data name will automatically be generated for each Variable beginning with var_

The type drop down allows you to select the type of answers allowed for that variable. For example, a text field would allow text or numeric to be entered while email address would have a required @ symbol.

Ask, Edit, Sync Settings

Each variable has three settings that can be turned on/off by checking or unchecking. Each setting is used to configure where the variables appear and who can enter them:

- **Ask**- If this setting is checked when the mobile user first logs in they will see these questions and will be able to enter their own answers. If this setting is un-checked it would be the web users responsibility to enter each mobile users variable answers by going to Manage → Mobile Users.

- **Edit**- Allows mobile users to edit their variable values. If using variables a new menu item will be available called "My Info". In this section of the app if edit is checked mobile users would be able to change their variable answers as needed. If edit is unchecked the mobile user will see read only variables and will not be able to edit them.

- **Sync**- If Sync is selected, anytime a change is made to a Variable on a mobile device, the value will automatically be modified on the portal side for that user.

In the screenshot above these three variables would be shown immediately when a mobile user logged in since the Ask checkbox was selected. The mobile user, once finished answering all the variables, would then be able to also edit their answers since the edit checkbox is selected. Once the mobile user finished entering all the variables any web user (that has the correct rights) would be able to see the variable answers from the portal since Sync is checked.

Variables (CONTINUED)

NEW!

Variables eliminate the need for people to have to continually type in common information unique to them or the location of the device. As an example, if you built a form that requires the user to type in his/her name and employee ID each time they fill out a form, with variables you can ask them for their name and Employee ID when they first load doForms. You can then reference those values from with in your form using the calculation widget. Variables are configured by account so you set the questions and how you want then answered. Mobile users can also edit their information if given permission and variable values can be managed remotely via the portal so that devices can be configured with the correct data for each user.

Answering variable questions for mobile users

1) Load and Open doForms

2) Both new and existing users will be prompted to answer questions once you have created your variables and set the ask fag to on.

3) If you allow your users to edit their information then they will be provided with a menu option called My info which they can edit at anytime. Set Sync to on if you want the portal updated.

My Information

The following information will be used to automatically populate required fields in forms therefore eliminating the need to manually enter this data each time.

First Name *
Enter your name

Edit your personal account variables below.

First Name *
Enter your name

John

Last Name *

Smith

Email *

Jsmith@doforms.com

Save   Cancel

When a user is required to enter information into variables they will be prompted with a predefined message and will be asked to enter information one variable at a time.

A mobile user can view the answers in the My info section of the menu. If edit is allowed then they will be able to modify this information. If Sync is on then the portal will be automatically updated.

Answering variable questions for web users

1) Log into the doForms portal and go to Manage → Mobile Users

2) Select the mobile user you want to add variable answers to and click the edit button on their mobile slot

3) At the bottom of the page you will see the Variable questions and answer boxes

4) Note if Sync is checked these answers will be sent to the mobile device for the mobile user to see and potentially edit if allowed

Edit mobile user

Mobile unit number	9055059020
PIN (4-8 Digits)	123456
Nickname	John Smith
Email (optional)	jsmith@doforms.com
	☐ Send notification email to user
Mobile group	▼ Manage
Default project	Test ▼

User variables   Edit

First Name	John
Last Name	Smith
Email	Jsmith@doforms.com
Phone	

Save Cancel

Calculations ⓘ

Caption text *
First Name

Hint

Data name *
First_Name

Calculation Type
◯ Numeric ⦿ Text ◯ Date/Time

Expression *
Operator
= ▼

Field *
var_First_Name ▼

Add expression

As you can see in the above screenshot the web user can change the answers for this mobile user at any point of the process. They can even click the edit button which takes you to the variable screen to edit the questions if needed.

The screenshot above shows how you can point a text calculation field in your form to any of the Variables created in the account.

Report Builder Enhancements

NEW!

You can now select a column based format versus the standard structured format for your report. You can also load your report data into a predefined Excel Template which will give you the ability to further manipulate your consolidated report data before it is emailed to the recipients. This feature extends the basic features of report builder by allowing you to create things like pivot tables, charts and graphs, Macros and formulas. Use the column layout and Excel to create and distribute custom dashboards on a scheduled basis.

Using the setting

1) After creating your report one of the final steps in the process is scheduling your report for distribution. As part of this step you will be able to select either column layout or the structured layout.

2) At this point you will also have the opportunity to specify a pre-existing report template and select which sheet in your template the data should be loaded into.

3) A report template is an Excel spreadsheet you save as an Excel template and upload to doForms when building the form your report is based on.

The column layout format is easier to use when parsing data in your template. Before your report is distributed to your pre-defined users, your spreadsheet template will automatically execute any macros, formulas, etc. and will distribute the area in your spreadsheet you define as your print area.

Column Layout

Supervisor Name	Employee	Date	DOW	Clock In	Clock Out	Total
Scott Klimchak	Dan Miller	1/28/2016	Tuesday	9:20 AM	5:00 PM	7:40
Scott Klimchak	Dan Miller	1/28/2016	Tuesday	9:20 AM	09:20 PM	12:00
Scott Klimchak	Dan Miller	1/28/2016	Tuesday	04:13 AM	5:00 PM	12:47
Scott Klimchak	Dan Miller	1/28/2016	Tuesday	09:15 AM	5:00 PM	7:45
Scott Klimchak	Dan Miller	1/29/2016	Wednesday	9:20 AM	5:00 PM	7:40
Scott Klimchak	Dan Miller	1/29/2016	Wednesday	01:43 PM	5:00 PM	3:17
Scott Klimchak	Dan Miller	1/29/2016	Wednesday	9:20 AM	5:00 PM	7:40
Scott Klimchak	Dan Miller	1/29/2016	Wednesday	9:20 AM	5:00 PM	7:40
Scott Klimchak	Dan Miller	1/29/2016	Wednesday	10:37 AM	10:37 PM	12:00
Scott Klimchak	Dan Miller	1/29/2016	Wednesday	9:20 AM	5:00 PM	7:40
Scott Klimchak	Dan Miller	1/31/2017	Thursday	04:10 AM	5:00 PM	12:50
Scott Klimchak	Dan Miller	1/31/2017	Thursday	04:10 AM	5:00 PM	12:50
Scott Klimchak	Jane Doe	1/28/2016	Tuesday	9:20 AM	5:00 PM	7:40
Scott Klimchak	Jane Doe	1/28/2016	Tuesday	9:20 AM	5:00 PM	7:40
Scott Klimchak	Jane Doe	1/28/2016	Tuesday	04:13 AM	5:00 PM	12:47
Scott Klimchak	Jane Doe	1/28/2016	Tuesday	9:20 AM	5:00 PM	7:40
Scott Klimchak	Jane Doe	1/28/2016	Tuesday	9:20 AM	5:00 PM	7:40
Anthony Trani	Jim Harris	1/28/2016	Tuesday	09:30 AM	5:00 PM	7:30
Anthony Trani	Jim Harris	1/28/2016	Tuesday	9:20 AM	5:00 PM	7:40
Anthony Trani	Jim Harris	1/28/2016	Tuesday	9:20 AM	5:00 PM	7:40
Anthony Trani	Jim Harris	1/28/2016	Tuesday	04:13 AM	5:00 PM	12:47
Anthony Trani	Jim Harris	1/29/2016	Wednesday	09:15 AM	10:37 PM	13:22
Anthony Trani	Jim Harris	1/29/2016	Wednesday	01:43 PM	5:00 PM	3:17
Anthony Trani	Jim Harris	1/29/2016	Wednesday	9:20 AM	5:00 PM	7:40
Anthony Trani	John Doe	1/29/2016	Wednesday	9:20 AM	5:00 PM	7:40
Anthony Trani	John Doe	1/29/2016	Wednesday	10:37 AM	5:00 PM	6:23
Anthony Trani	John Doe	1/31/2017	Thursday	9:20 AM	5:00 PM	7:40
Anthony Trani	John Doe	1/31/2017	Thursday	04:10 AM	5:00 PM	12:50
Anthony Trani	John Doe	1/31/2017	Thursday	04:10 AM	5:00 PM	12:50

When using the column layout with a custom template you can place the data into any sheet in your excel template.

Structured Layout

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

NEW!

Read Only, Required, Hide Enhancement

Control how form elements are presented to users who receive forms by virtue of the forward operation. For example, you forward a form to a customer using the forward to email option so that they can agree to your fee and pay by credit card. In this case, you would want to set the fee field to read only so that they could not edit the fee amount.

Using the setting

1) Within the form builder, select an individual field in your form.

2) On the right hand side settings you will see drop down settings for read only, required, and hide.

3) Select which setting you would like to apply (read only, required, or hide) and then select the checkbox for "Forward Recipient".

4) Depending on which settings you selected when a form is forwarded the recipient of that forward will see these settings applied to the fields in their form.

In the example below, User 1 is a mobile user who was dispatched a form. The read only, hide and required fields are based on the rights of a mobile user. When User 1 forwards a form to User 2 who is also a mobile user, User 2 is no longer considered a mobile user but is now considered a Forward recipient and their access is now defined modified accordingly.

User 1

Read On Forward
This will be read only
Hide On Forward
This will be hidden
Required On Forward
This will be required
Forward To
9085059020

User 2

Read On Forward
This will be read only
Required On Forward *
This will be required
Forward To

If the form is re-forwarded by the Forward Recipient then the new recipient will be treated like a Forward Recipient as well.

If the back to sender option is selected or the form is submitted then the next person that views this form will no longer be subject to the Forward Recipient settings.

Action Button Enhancements

We have added two additional action buttons to help you navigate between forms. One allows you to open another form while temporarily closing your current form. Exiting the 2nd form will reload the first form and place you back at the exact location you left from. The other allows you to load a form you were working on but did finish or a form you already sent.

Using the new action button options

1) Open an existing form or create a new form in the form builder.

2) Add an action button to your form"

3) Select the action for either "Open form" or "Open form from review"

    A. If you selected Open form you will be prompted to select which project/form this button will open. Please note that if you select a form that the mobile user trying to use the button does not have access to the mobile user will see an error message.

    B. If you selected open form from review you will not need to do any additional prompts. When clicked in the app a small popup window will appear for your to select the form in review which you would like to open.

The Open form action (left) will open a blank form every time while Open a form from review (right) will allow a user to select a specific saved (or sent) record to open. If you open a sent form and resubmit it a new form will be sent.

NEW!

Zebra Device Support

doForms has been certified on Zebra's line of rugged Android devices. Simply download doForms onto your Zebra device and doForms will automatically load the correct profile and switch your device from camera scan mode to 2d imager mode. The 2d imager provides a significant advantage over the red line camera option reducing scan times while providing a more user friendly experience.

Default Project Setting

When configuring a mobile user with access to more than one project, you can now select the users default project. When doForms is started, the forms window will be populated with forms located in the default project.

Widget enhancements

Navigation: we have enhanced the barcode widget to automatically move to another field automatically after scanning.

1) Add a barcode field to your form (either in a container or by itself)
2) On the right hand side settings, check the setting for "Jump to next question."
3) This setting will automatically jump the user to the next input field after a barcode is scanned.
    A. If the barcode field is inside of a table users will have the opportunity to have the field jump to the next column or down a row after a scan.

Support for keyboard interrupt based devices:

1) Add a text field in your form
2) On the right hand side settings under Keyboard, select the radio button for none.
3) This allow a keyboard interrupt based device to automatically fill the field without the onscreen keyboard being present.

More Info: https://www.doforms.com/news/zebra-handheld-scanners-partnership/

VALIDATED

ZEBRA

Using the new default project setting

Changing the settings:

1.) Go to Manage → Mobile Users in the mydoforms portal
2.) Either add a new user to a blank mobile slot of select edit on an existing user
3.) Click the drop down for "Default Project" to assign what project this user will load up by default
4.) Please note that only projects the user has access too will appear in this list

Edit mobile user

Mobile unit number	9085059030
PIN (4-8 Digits)	9030
Nickname	John Doe
Email (optional)	

☑ Send notification email to user

Mobile group	▼ Manage
Default project	▼

Concrete
Electrician
Main Project

Save Cancel

Whatever project is selected is the project that will be displayed when the user first logs in as well as every time they update the app.

Form Sequence Number

NEW!

Forms in the mobile app appear in alphabetical order. With this enhancement you will be able to change the order in which your forms are listed.
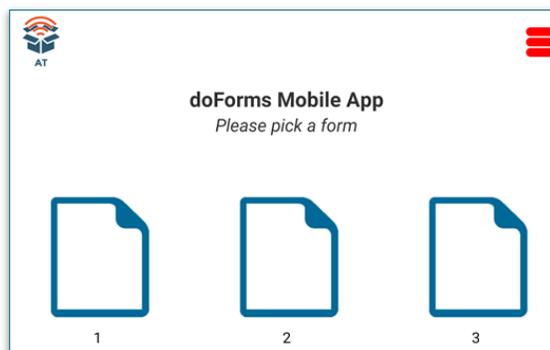
Choose One Enhancement

NEW!

doForms is committed to helping you build beautiful forms and building them fast. It is now easier then ever to ask a simple question and get your answer using our new slider option in the choose one widget.

Using new form sequence settings:

Using form sequence on new forms:

1) When you build and publish a form you will have the option in the publish screen to create a Sequence Priority Number

2) Enter a numeric value from 1 to 100. mobile app and web Client will use the sequence number to determine the order in which the forms will appear.

3) If two forms have the same sequence number then doForms will order them alphanumerically.

4) If a form has no sequence number it will appear after all forms with a sequence number.

Using form sequence on existing forms:

1) Open an existing form in the build forms screen by clicking the open special button

2) Once the form is opened click the Settings tab and select the Form Icon option

3) In the Form Icon page you can enter a new sequence number or change your existing sequence number

4) Save your changes and resave your form

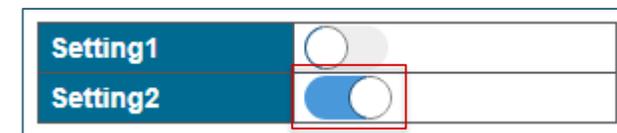5) The next time the mobile app or web client is updated or opened the new sequence order will be applied

Using the On/Off buttons:

1) Add a choose one field to your form

2) Select the new slider option

3) Either pick a predefined set of values or customize your own

4) You can even pick the background color when the slider is in the selected position

Check the box for the Slider Color under custom appearance to select a new color.

Data Lookup Enhancement

NEW!

When you have a data lookup in your form based on a condition, the lookup would filter the results and give you the ability to select an item in the list. The problem is sometimes the result only yields one result by design. In the past the user would still have to select the single result adding an unnecessary step. This new enhancement allows you to automatically set the lookup to the first value returned. This effectively would allow you to join multiple data sources.

Using new setting:

1) Add a lookup field to your form
2) On the right hand side settings add a lookup condition. The condition can be set to another lookup field or any other input field in your form
3) Once you add a condition you will see a checkbox under the condition area for "Display first matching record".
4) When checked this will automatically display the first item in the lookup file that meets the condition that was specified
   A. To remove the eraser icon, set the field to read only

Employee #	Name
LC0036	Luis Gonzales

In the past you would add a data lookup based on employee ID and set a destination field for employee name. The problem is that the user would see all employee IDs in the data source. If we created a text box called EMP ID and used it as a condition in a data lookup, the user would have to pick the employee name from the drop down even though there was only one name listed.
With the new enhancement the name field would automatically be set to the name that matched the EMP ID. Make it read only to remove the eraser.
With this feature you could potentially link many data sources together automatically. Lets say that in the example above a destination field was created called EMP TYPE ID. You could then use the destination field as a condition in another data lookup that could return the EMP TYPE DESC.

Form Folders

NEW!

Menus are great and doForms has both a definable ribbon bar and a menu icon with a drop down list of options. What if you don't want a ribbon bar or your employees don't know to click on the menu icon. Well now you can add icons into the form window on your mobile app or web client.

Adding folders to the forms list:

1) Go to Manage → Account Settings → Customize Mobile Interface
2) Scroll down to the "Main Menu Bar" section where you will see a header for "In Form View"
3) Check off the icons you wish to see in your forms list and leave the other unchecked so they don't appear.
4) Select where you would like to see these icons before the rest of your forms or after them by clicking the drop down next to the "Display Icons" setting.
5) The icons will be the same icon configured in the ribbon menu bar

In form view

Display icons: Last
- ☑ Show "Projects"
- ☑ Show "Jobs"
- ☑ Show "Review"
  - ☑ Show "Incomplete"
  - ☑ Show "Completed"
  - ☑ Show "Sent"
- ☑ Show "Retrieve"
- ☑ Show "Update"
- ☑ Show "Settings"
- ☑ Show "My Info"

Service Order   Time Sheet   POD

Jobs(5)   Settings   Incomplete(9)