Table of Contents

1 Template

- Templates in magic5 are used to **define what data is to be collected** on a mobile device form. Every implementation of magic5 needs **at least one template** and some systems use 50 or more.

- Forms to be completed on the device can be **initiated by the device user** (using the "New Form" option and selecting a template) **or by an office user** initiating a job which has a template associated with it. The **same template can be used for either initiation**.

- A template consists of one (or more) documents. A document has one or more Pages of questions, a Page being simply of way of breaking up the form into manageable chunks. Each Page in turn has one or more Sections. Each Section has a heading and one or more Template Items. See **magic5 Hierarchy Explained (on-line documentation)**

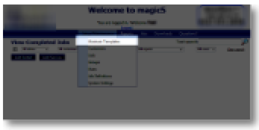
- **Template items are individual questions/answers or pieces of information to display**. They can be simple Text items, Drop-down lists, Tick (check) boxes, Display information from an associated job, links to documents, options to take Photos etc. See **Item type (Section 7)**.

- Additionally the template can contain **automated actions** to initiate at each status. This might be "when a form is received from the device, e-mail a PDF of the form to the customer" or something like "when a form is finished on the device, add specified items to a daily summary". See **Template action (Section 6)**.

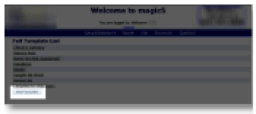
- Template settings control **editing options** for any form using that template: whether the form can be saved as incomplete and then edited, whether it can be deleted by the user, whether it can be edited on the web site after submission etc. See **Editing rules (on-line documentation)**.

- Forms **submitted** from a device are referred to as reports and can be viewed in report lists, filtered depending on their status. These lists can be customised within the template, including additional information and overriding default display items such as the customer. See **Report lists (on-line documentation)**.

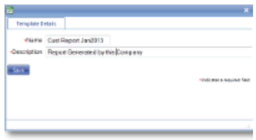
- The **PDF** and **Excel** report formats associated with a template are also specified through the template settings. See **Concept - PDFs ('Concepts - PDFs' in the on-line documentation)** and **Concepts - Export to Excel (on-line documentation)**



Add template



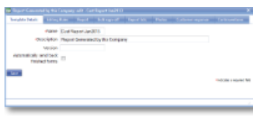
From the main administration screen, select Maintain Templates from the Setup/Maintenance menu. Then click the Add Template button to set up a new template.



*Name	*A name that will identify this template, such as 'Jobsheet' or 'Delivery Note'. A qualifier, such as 'Jan2013' or sequence of numbers may be useful in case new versions are required in the future. This can be amended later if necessary.*
*Description	*A longer name for the template, suitable for use on reports that may be sent to customers. It will appear in the list (see below) and can also be amended later on.*

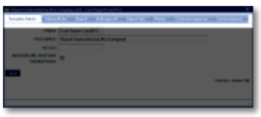
Template - amending

Once the Name and Description have been entered, the template can be set up and further parameters entered or amended as required.



Version	*If you wish to keep track of different versions of the template you may enter a version number here.*
Automatically send back finished forms	*If this field is checked then any form which is finished on the PDA is automatically sent back to the web site (if the PDA can make a connection to the site). A form is finished either because it has been manually released by the user or because it has been saved and editing of saved forms is disallowed. This option means that the user does not have to remember to send back finished reports manually. However, if network conditions prevent the sending of a report when it is finished, a manual sync may be appropriate.*

Template - further parameters

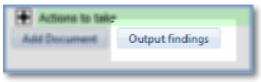


Click on a link below to find out what parameters are on the different tabs.

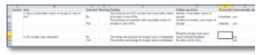
Editing rules (on-line documentation)	**Report tab (on-line documentation)**	**Bulk sign-off (on-line documentation)**	**Report lists (on-line documentation)**	**Photos (on-line documentation)**	**Customer response (on-line documentation)**	**Contra (on-lin docum**

Template - Output findings

Findings are free text attached to specified multiple choice answers. These are likely to be



additional information for an inspection, and can be added automatically or manually and can usually be modified on the device or the back-office portal. To facilitate management of these they can be output into an Excel Spreadsheet for viewing.

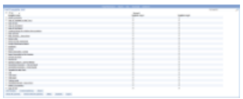


Remember that any amendments will need to be undertaken in the usual way and that the spreadsheet is for viewing purposes only - see **Item Type - Findings (on-line documentation)** for more information adding/amending in magic5.

2 Template List

The Template List is the area from which templates are managed.

Initially all templates are shown but these can be searched using text entered in the top right-hand corner. This can be cleared using the 'Clear search' link.



Left-click to bring up the template details (see **Template help (Section 1)**) or **Right-click** on an item to bring up a context menu offering **Delete** it or **Duplicate**.

Duplication is recommended whenever making major changes, especially if a template is already in use - it can easily be deleted once things have settled down.

Duplication is also useful for getting started on a new template - find one that is nearly suitable, duplicate it and make changes until it is exactly as required. This saves time on creating a full hierarchy of document, page, section and standard items such as job reference.

Buttons at the bottom of the screen perform the following actions.

Add Template

*Click this to create a completely **new template from scratch**. Bear in mind the comments above about duplicating as this will save time on creating the full hierarchy.*

Create template tag

*This is another way of **searching** a list of templates by grouping them under 'tags'. It may be appropriate to group them as quotations/invoices/receipts, by customer types such as public/private sector, in a long list it might be an alphabetical list such as A/B/.../JKL/... etc. This simply makes things easier to find for maintenance and therefore reduces the likelihood of errors.*

*Once the tag has been created, a **column of tick boxes** appears. Select a box in the appropriate column in line with the template to be tagged. To search for a particular tab, use the **drop-down list in the top left-hand corner**.*

Import/Export

These 2 buttons allow a template to be exported from one magic5 system and imported to another. This is useful when moving from (for instance) the trial system to a permanent system, or if more than one system is being run in parallel.

*The **Export** button downloads coded information which can be saved in an appropriate folder from which it can be **Imported** to the new system. Any **lists** used by the template will also be exported and subsequently imported (if they do not already exist).*

Add to/Remove from all customers

These 2 buttons add or remove selected templates to/from all customers. Select templates using the tick boxes on the left.

*To add all templates to a customer, use the **Customer ('Attachments for a customer' in the on-line documentation)** screen.*

Delete

Select which template(s) need to be deleted using the tick box next to it and click this button. A confirmation box will appear after which the template(s) will be permanently deleted.

Duplicate

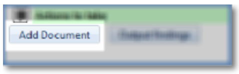
This allows more than one template to be duplicated at a time.

Select which templates need to be duplicated and click this button. They will appear with the words 'Copy of' in the title and this can, obviously, be changed as required.

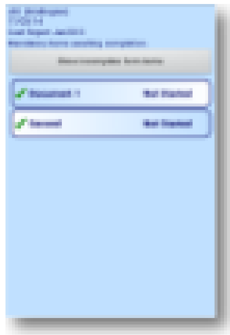
3 Document

Document - splitting up a form

A document is a way of splitting up a form - usually there is just the one document, but often sets of questions are related to each other (eg bathroom inspection and kitchen inspection) so splitting them into multiple documents makes sense.



The number of documents in a template will depend on the workflow of the job for which is intended. If data will be entered at different stages or times, it is better to split the template into multiple documents to guide the user to work on one at a time. However, if the user will be completing sections in an inconsistent order then it is better to use a single document as only one document can be open on the device at a time and this avoids multiple closing and re-opening.

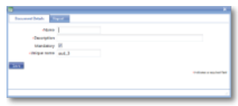


For example, data collected at the start and at the end of a leasing period needs to be grouped together as one report but would sensibly be split into two related inventory documents. Conversely, an engineer's call-out report might require technical information and photographs as well as parts ordering which may require 'jumping about' as the investigative work progresses.

Main

Enter basic details for your document.

*Name	*A name that will identify this document, such as 'Bathroom' or 'Kitchen'.*
*Description	*A longer name for the document, suitable for use on reports that may be sent to customers. It also needs to mean something to administrators and device users.*
Mandatory	*Tick this box if the question is mandatory and leave it blank if it is optional. This will depend on whether the answer to this question is critical to the data that is being collected, such as signature to confirm customer acceptance.*
Unique name	*A unique name must exist for everything in a magic5 template. It is so important that magic5 pre-fills the prompt with a non-meaningful name which it will use by default.* ***This does not need to be changed.***



*However, if the data associated with the unique name is to be used elsewhere (for example as part of a calculation, imported or exported, or carried over to a new job), it is helpful to use a meaningful name (such as RefNo, QuantityOrdered, ItemTotal, ContactName, ReasonForReferral) and this meaningful name must be entered **before the template is used with real data**.*

If the unique name <u>is</u> changed at a later date, existing data will not be lost but it may no longer be accessible by magic5, in which case it cannot be displayed, used in calculations or exported. It is therefore recommended that this is done only as a last resort and that the original template is duplicated before changes are made - this means that existing data can still be retrieved if necessary. If in any doubt, please contact magic5 support for the best way to deal with this.

Report tab

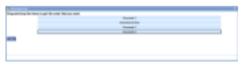
Options for document behaviour within a report.

Suppress from report

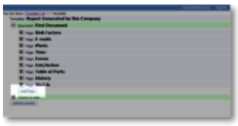
If a document is to be withheld from the final .pdf file, tick this box - ie for internal use only..

Rearrange documents/actions

Click on the 'Rearrange documents' link to see the list as shown on the right. Drag 'n' drop documents until they are in the order you require.

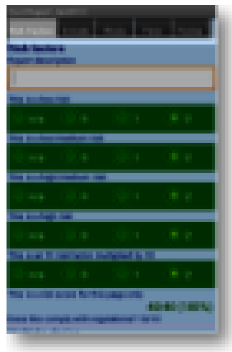


4 Page



Page - splitting up a document

Pages break up a document - it's as simple as that! Each page appears on the device as a different tab which helps the user to organise their time. A number of sections may be included to appear on the same device screen.



Each page has a named tab, enabling the user to see which category of sections will be contained in it. Although purely for display purposes, making navigation easier for the user will improve the integrity of the data entered and so careful categorisation of sections is important.

For example, a document for car inspections may have pages for bodywork, engine condition, exhaust, tyres and miscellaneous with photograph options at the bottom of each. However, the same inspection might be organised with pages for damage report, supporting photographs, labour report with costings, parts ordering with costings and maybe a comments page. Both examples might well have a signature capture page at the end for confirmation that the owner or customer agrees with the inspection.

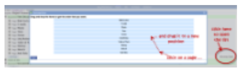
Main	*Main details for the page*
*Device tab page name	*This controls the name of this page as shown on the device. It appears on the “tab” of the tab page so it should be short but meaningful. Since pages are only an organisational tool used on the device and are not used as such for reports this name has no implication for the report itself.*
Layout of questions	*When displaying forms on a device, magic5 tries to present the information to the user in a sensible and logical manner. This default behaviour is given the name “Automatic” in this drop-down list. If you would like to control the behaviour of the form layout yourself then you may choose another value. Each item can be thought of as consisting of a question and an answer. The choices for this field correspond to how these questions and answers are laid out on the form. You may specify whether one line or two are used and how the fields are aligned.*

	Note that some items such as text boxes set to "full screen width" may override the value you choose here.
*Unique name	*A unique name must exist for everything in a magic5 template. It is so important that magic5 pre-fills the prompt with a non-meaningful name which it will use by default.* ***This does not need to be changed****.* *However, if the data associated with the unique name is to be used elsewhere (for example as part of a calculation, imported or exported, or carried over to a new job), it is helpful to use a meaningful name (such as RefNo, QuantityOrdered, ItemTotal, ContactName, ReasonForReferral) and this meaningful name must be entered* ***before the template is used with real data****.* *If the unique name is changed at a later date, existing data will not be lost but it may no longer be accessible by magic5, in which case it cannot be displayed, used in calculations or exported. It is therefore recommended that this is done only as a last resort and that the original template is duplicated before changes are made - this means that existing data can still be retrieved if necessary. If in any doubt, please contact magic5 support for the best way to deal with this.*
List name containing repeat details	*Usually your pages will be different from each other, with different details contained on each. However, in some situations you may have one set of page contents that needs to be repeated on multiple pages. This could involve multiple sections with multiple items, it's just a normal page. For instance, a page could contain measurements and audits for an aisle in a supermarket. You may want to repeat all of these questions for 10 different aisles, with each aisle on a separate age. In that case you could create a list called, say, "Aisle names" and put in entries like "Bread", "Fish" and "Cereal".* *Within the template you could then specify the "Aisle names" list as the page's "repeat details list". Rather than showing a single page on the device there would be individual pages for "Bread", "Fish" and so on, each with their own set of questions.* *This approach can be useful if each page does really need to contain the same questions but if any variation in questions is needed then you would just use the standard approach of specifying individual pages.* *Even if the questions are standard across pages, in most scenarios the "repeat details list" is unnecessary complication – simple duplicate the pages and rename as required.*

	One case where this could be useful is where you have a standard template which you duplicate and rename depending on particular requirements. In that case each the list of pages would probably change with each new template and it will be simpler to create a new list rather than recreating all of the pages in the template.
Enable option to copy results from previous page	*If the page is set up with a "repeat details list" (ie. the page is repeated a number of times with identical questions) then you can enable an option to copy the results of the previous page onto the current page. The results can then be edited as required. Tick this box if you would like to enable the option. It has no effect on pages that do not repeat.*

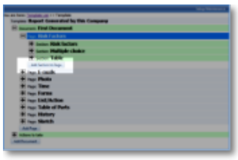
Rearrange pages

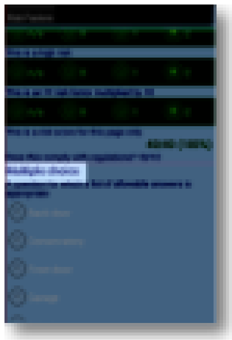
Click on the 'Rearrange pages' link at the bottom right of the screen. This will display the list of pages in their current order. Drag 'n' drop the page names until they are in the required order.



5 Section

Section - splitting up a page





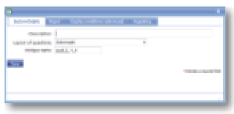
Sections break up the page into paragraph type structures with headings and contain a set of related questions to be answered by the user.

Typically, a section corresponds to a heading within a report so needs to be designed with the end reader in mind (often a customer). These headings may or may not be displayed on the report and a whole section can be suppressed from the device or from a report.

For example, Freezer Hygiene could be a section containing 5 or 6 individual questions within a full kitchen inspection and would appear on both device and report. Health and Safety guidelines regarding access to a particular area of a building or an internal costing matrix would appear on the device but not on the report. Terms and conditions, disclaimers and other large quantities of text would appear on the report but might be too cumbersome for the device.

Main

	Main details for a section
*Description	*Enter the text that will be used as the heading for this section - it will appear in bold.*
Layout of questions	*When displaying forms on a device, magic5 tries to present the information to the user in a sensible and logical manner. This default behaviour is given the name "Automatic" in this drop-down list. If you would like to control the behaviour of the form layout yourself then you may choose another value. Each item can be thought of as consisting of a question and an answer. The choices for this field correspond to how these questions and answers are laid out on the form. You may specify whether one line or two are used and how the fields are aligned.* *Note that some items such as text boxes set to "full screen width" may override the value you choose here.*
*Unique name	*A unique name must exist for everything in a magic5 template. It is so important that magic5 pre-fills the prompt with a non-meaningful name which it will use by default.* ***This***



does not need to be changed.

However, if the data associated with the unique name is to be used elsewhere (for example as part of a calculation, imported or exported, or carried over to a new job), it is helpful to use a meaningful name (such as RefNo, QuantityOrdered, ItemTotal, ContactName, ReasonForReferral) and this meaningful name must be entered ***before the template is used with real data****.*

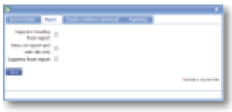
If the unique name is changed at a later date, existing data will not be lost but it may no longer be accessible by magic5, in which case it cannot be displayed, used in calculations or exported. It is therefore recommended that this is done only as a last resort and that the original template is duplicated before changes are made - this means that existing data can still be retrieved if necessary. If in any doubt, please contact magic5 support for the best way to deal with this.

Report

Reporting details for a section

Suppress heading from report

If you don't wish the section heading to be shown on the final report, please check this box. NB the questions are not suppressed, only the heading.



Show on report and web site only

Tick this box if you don't wish this section to appear on the mobile device. There may be customer information or long tracts of text that are required for the report and web site that are too sensitive or would clutter up the device unnecessarily.

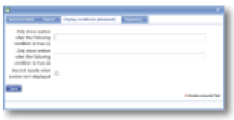
Suppress from report

Tick this box to suppress this section from the report if the entire section is for internal use only.

Display conditions (advanced)

Display conditions for a Section.

These prompts are advanced options which allow the section to be linked to an answer given to a question - eg if "other" has been selected from a drop down list or "no" to whether a service was deemed acceptable. Please refer to your magic5 expert for more information.



Only show section when the following condition is true (1)

Enter a conditional statement that affects whether the input item is displayed on the device such as whether a previous answer has been yes or no.

Only show when the following condition is true

Enter a conditional statement that affects whether the input item is displayed on the device such as whether a previous

(2)	*answer has been yes or no.*
Record results when section isn't displayed	*Tick this box if you wish results to be recorded when section isn't displayed.*

Repeating

Sometimes it is useful to be able to repeat a set of questions. For instance, if normal practice is for there to be only one refrigeration unit but sometimes there are several it would be unnecessary use of space to put numerous questions but the user of the device can repeat the section if it is necessary. However a section cannot be repeated if it contains repeating items - ie. you can either have items able to repeat or the full section able to repeat but not both.

Allow section to be repeated multiple times	*This option allows you to specify that all of the items in the section can be repeated.*
Text on button for adding section	*For repeating sections, enter the text that will be shown on the button allowing new sections to be added.*
Allow deletion of last repeated section	*Tick this box to allow the device user to delete the last repeat of this section.*
Text for delete button	*Enter the text that will be shown on the button that deletes the last repeated section.*
Text for delete confirmation message	*To prevent inadvertent deletion, a confirmation message will be shown. Enter the text to be used here. If no text is added the default 'Are you sure that you wish to delete this last repeating section?' will be displayed.*
Default values for repeated sections (advanced)	*This area is reserved for flags for customisation the repeating process. See your magic5 specialist for more information.*

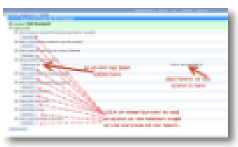
Rearrange sections

Click on the 'Rearrange sections' link at the bottom right of the screen. This will display the list of sections in their current order. Drag 'n' drop the page names until they are in the required order.

6 Template action

Template Actions are found in Maintain Templates. It is possible to attach actions/behaviours to various stages of the report's lifecycle. The word 'report' is used to indicate that the 'form' has been fully or partially completed and is on its way to being released as a document. There are a number of actions that can be applied to a number of stages in the lifecycle. This page will explain the stages and you can get help on the actions by clicking on these links:-

Export to Access 2003 (on-line documentation)	**E-mail PDF Report (on-line documentation)**	**Output to XML file (on-line documentation)**
Output to PDF file (on-line documentation)	**Output to CSV file (on-line documentation)**	**Output to management reports package (on-line documentation)**
Output to Contractor monitoring systems (on-line documentation)	**Automatically release to Customer (on-line documentation)**	**Mark as Awaiting customer response (on-line documentation)**
Mark as Awaiting invoicing (on-line documentation)	**Set a value for an item within the document (on-line documentation)**	**Set a value for the associated job (on-line documentation)**
E-mail notification (no attachments) (on-line documentation)	**Create a new job (on-line documentation)**	**Status update (on-line documentation)**
Update status of older forms on the same job (on-line	**Update user attribute (on-line documentation)**	**E-mail an Excel version of the report (on-line documentation)**



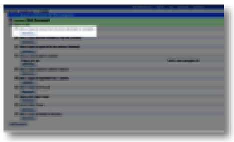
documentation)		
Update customer attribute (on-line documentation)	**Update location attribute (on-line documentation)**	**Update stock levels (on-line documentation)**
Update order history (on-line documentation)	**Create reference numbers for follow-up actions (on-line documentation)**	**Create jobs based on follow-up actions (on-line documentation)**
Set the customer location of the form (on-line documentation)		

When a report is received from the device (Incomplete or Complete)

Actions corresponding to this event are triggered as soon as a form is returned from the device, regardless of its status (ie. whether it requires further editing or sign off by the user).

Typical actions associated with this event:

- *Send an e-mail to an administrator letting them know that a new report has been received*
- *Send an e-mail to the customer, assuming that no manual sign-off or further editing is required*



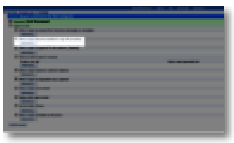
For more information see ***Report status help. (Section 8)***

When a report becomes available for sign-off (Complete)

Actions corresponding to this event are triggered as soon as the form reaches the "Complete" status. In effect this means that the user who completed the form has finished with it and it has been passed to the next stage. All mandatory items on the form will have been answered.

Typical actions associated with this event:

- *Send an e-mail to an administrator letting them know that a report is available for signing-off to the customer*
- *Automatically release the report to a customer*
- *Export report details to XML for external systems to process*



For more information see ***Report status help. (Section 8)***

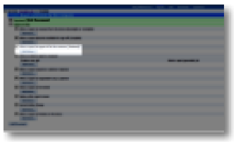
When a report is signed-off to the customer (Released)

Actions corresponding to this event are triggered when a report reaches the "Released" status.

Typical actions associated with this event:

- *Send an e-mail to the customer*
- *Export report details to management statistics module*

For more information see ***Report status help. (Section 8)***



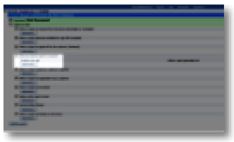
When an interim report is received

Interim reports are "snapshots" of a form before it is finished with on the device. For example, suppose you had a form that represented a full ambulance journey: pick up medic; en route to patient; pick up patient; en route to hospital; drop off patient; return to base.

Typical actions associated with this event:

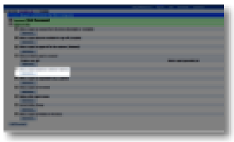
- *Export as XML for an external system*

For more information see ***Report status help. (Section 8)***



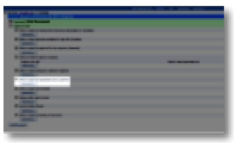
When a report requires a customer response

This is a bespoke status representing the point when a report requires a customer response. For example, a completed job sheet may need an order number to be allocated by the customer before an invoice can be raised. Setting the report to "awaiting customer response" will trigger an action that sends an email to the customer asking them to log in and add an order number. This will trigger the report to move to the next status.



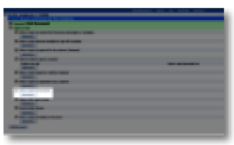
When a report is responded to by a customer

This is a bespoke status that is triggered when a customer adds a response to a form of status 'awaiting customer response'. For example, a customer may enter an order number and an email is triggered to inform the office that the order number has been supplied.



When a report is forwarded

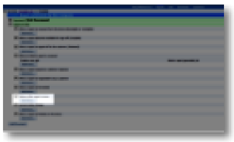
This status is reached when a form has been forwarded to another device using the ***Forward Form item type ('Item Type -Forward form' in the on-line documentation)*** *within a template - the form is sent to the server by the original device and then downloaded by the receiving device. When the forwarded form is received on a server (on its way to the receiving device) the 'When a report is forwarded' actions are triggered. For example an email could be triggered to the*



receiving user to alert them that a form is on it's way.

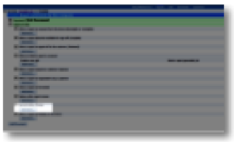
Option within report screen

magic5 allows a website user to trigger PDF creation manually once the report is at a completed stage. This is done using buttons at the bottom of the report screen and these are included here. Unlike most template actions, these are not run automatically but give the user options that they may wish to take.



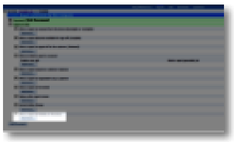
General status change

Actions added here are triggered by any status change. Separate headings exist for adding actions when a report becomes complete or when a report is released to the customer but the same effect can be achieved through this general status change heading.



When a report is finished on the device

Actions here are triggered immediately prior to a report being released from the device. At this point the report is no longer editable or usable by the user but is still linked to the device. There is a separate set of actions for this status which includes generating additional forms or adding the data into a summary form.



7 Item type

Item types

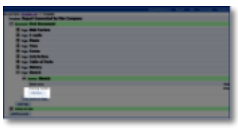
Item types make inputting data on the device simple and targetted to the job in hand. Many items contain the same sorts of information about when and how to display them, whether device users can modify list items or add more information and whether data must be entered before the form can be signed-off (ie mandatory). Most forms will incorporate a signature and many will have an optional photograph for supporting evidence.

Within Template Maintenance in the Setup menu, select an existing or create a new template. Open or create a document, a page and a section until it looks something like the screenshot to the left. Click on the **Add item** button to see the selection list on the right.

Click on these links to find out more about the parameters that can be set for different item types.

Text ('ItemType - Text item' in the on-line documentation)	**Drop-down list ('ItemType - Drop-down item' in the on-line documentation)**	**Number (Whole) ('ItemType - Number(Whole)' in the on-line documentation)**
Number (Decimal) ('ItemType - Number(Decimal)' in the on-line documentation)	**Date ('Item Type - Date' in the on-line documentation)**	**Risk factor 1 ('Item Type - Risk Factors' in the on-line documentation)**
Risk factor 2 ('Item Type - Risk Factors' in the on-line documentation)	**Risk factor 3 ('Item Type - Risk Factors' in the on-line documentation)**	**Risk factor 4 ('Item Type - Risk Factors' in the on-line documentation)**
Risk factor N ('Item Type - Risk Factors' in the on-	**Total risk score ('Item Type - Risk Factors' in**	**Standard/critical contraventions ('Item Type -**

line documentation)	the on-line documentation)	Standard/critical contraventions' in the on-line documentation)
Contraventions score ('Item Type - Standard/critical contraventions' in the on-line documentation)	Multiple-choice ('ItemType - Multiple-choice' in the on-line documentation)	Calculated value ('Item Type - Calculated value' in the on-line documentation)
Tick (check) box ('Item Type - Tick box' in the on-line documentation)	Signature ('Item Type - Signature capture' in the on-line documentation)	Fixed text ('Item Type - Fixed text' in the on-line documentation)
Table ('Item Type - Table' in the on-line documentation)	Output field ('Item Type - Output field' in the on-line documentation)	Job data ('Item Type - Job data' in the on-line documentation)
E-mail address ('Item Type - E-mail address' in the on-line documentation)	Invoice table ('Item Type - Invoice table' in the on-line documentation)	Work status ('Item Type - Work Status' in the on-line documentation)
Image ('Item Type - Image' in the on-line documentation)	Photo ('Item Type - Photo' in the on-line documentation)	Screen capture ('Item Type - Screen Capture' in the on-line documentation)
Time ('Item Type -Time' in the on-line documentation)	Calculate elapsed time ('Item Type - Calculate elapsed time' in the on-line documentation)	Add form option ('ItemType - Add form' in the on-line documentation)
Forward form option ('Item Type	Copy form option ('Item	Forward form and delegate job

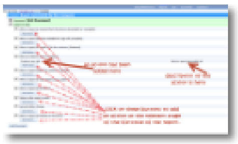


-Forward form' in the on-line documentation)	Type -Copy form' in the on-line documentation)	completion ('Item Type - Forward form and Delegate Job Completion' in the on-line documentation)
Scanned list ('Item Type - Scanned list' in the on-line documentation)	Action buttons ('Item Type - Action button' in the on-line documentation)	Job attachments ('Item Type - Job attachments' in the on-line documentation)
Contact person ('Item Type - Contact person' in the on-line documentation)	General attachments ('Item Type - General attachments' in the on-line documentation)	Damage control ('Item Type - Damage control' in the on-line documentation)
Text box entry of list item ('Item Type - Text box entry of list item' in the on-line documentation)	Extension history ('Item Type - Extension history' in the on-line documentation)	General output data ('Item Type - General output data' in the on-line documentation)
Shared secret ('Item Type - Shared secret' in the on-line documentation)	Alternative customer ('ItemType - Alternative customer' in the on-line documentation)	Sketch ('Item Type - Sketch' in the on-line documentation)
Drawing location ('Item Type - Drawing location' in the on-line documentation)	Anti-list (text box entry of item not in list) ('ItemType - Anti-list (text box entry of item not in list)' in the on-line	GPS reading - start form ('ItemType - GPS reading - start form' in the on-line documentation)

	documentation)		
GPS reading - finish form ('ItemType - GPS reading - finish form' in the on-line documentation)	Supporting attachment ('ItemType - Supporting attachment' in the on-line documentation)	Number (Whole) - for pricing ('ItemType - GPS reading - finish form' in the on-line documentation)	
Number (Decimal) - for pricing ('ItemType - GPS reading - finish form' in the on-line documentation)			

8 Report status

Report Status indicates where the report is in its lifecycle.

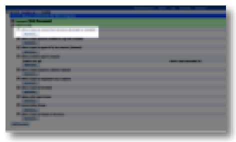


Statuses can be used very powerfully when setting up a template - actions can be attached to a particular report status, such as emailing a customer or administrator, exporting to a different format, creating a new job or skipping to a new status. The image to the left shows the **Template action (Section 6)** screen where these are set up and to the right are some of the actions that can be attached to the statuses.

When a report is received from the device (Incomplete or Complete)

*Actions corresponding to this event are triggered **as soon as a form is returned from the device**, regardless of its status (ie. whether it requires further editing or sign off by the user).*

*If the form has associated attachments then the event **will not be triggered until all attachments have been returned**. This means that a form with outstanding attachments will be viewable on the web site but, for example, it may not have been automatically e-mailed to anybody. Once all outstanding attachments have been received back, the "when a report is received from the device (Incomplete or Complete)" actions will be triggered.*



Typical actions associated with this event:

- *Send an e-mail to an administrator letting them know that a new report has been received*
- *Send an e-mail to the customer, assuming that no manual sign-off or further editing is required*
- *Send an e-mail to a supplier to place an order for parts*

When a report becomes available for sign-off (Complete)

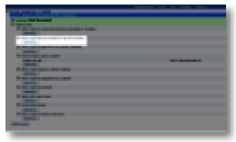
Actions corresponding to this event are triggered as soon as the form reaches the "Complete" status. In effect, this means that the user who completed the form has finished with it and it has been passed to the next stage. All mandatory items on the form will have been answered.

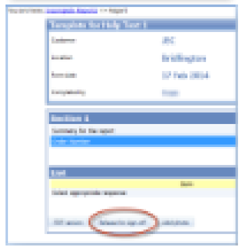
In many cases, forms arrive at this status directly from the device – they are released from the device and, because of template settings or because of the device user's instruction, they by-pass the Incomplete stage and become Complete.

*The template **editing rule ('Editing rules' in the on-line documentation)** that controls this behavior is "Do not allow* *user to edit documents via web site".*

If this option is selected *(ie editing documents via the web site is not enabled) then all reports coming back to the web site will be marked as "Complete".*

If it is not selected *(ie editing documents via the web site is enabled) then the device user will be prompted for a decision once they have finished with the form on the device and wish to release it: do they wish to further edit the form on the web site?*





- ***If they choose not to edit the report further*** *then it will be marked as Complete when it is received from the device, and both the "When a report is received from the device (Incomplete or Complete)" and the "When a report becomes available for sign-off (Complete)" events will be triggered.*
- ***If they choose to edit the report further*** *then it will be marked as Incomplete when it is received from the device and only the "When a report is received from the device (Incomplete or Complete)" event will be triggered. They will be able to login to the web site and edit the report further under their "Incomplete Reports" menu option. Once they have finished their editing they should choose the "Release for sign-off" option. This effectively moves the form to a Complete status and says "I have finished with this report and am happy with it. I now pass it on to an administrator to decide whether to release it to the customer". The "When a report becomes available for sign-off (Complete)" event will be triggered once they have "released for sign-off". This will run any actions associated with the event, which may include sending the administrator an e-mail letting them know that they need to process the report, or it may automatically release the report for viewing by the customer.*

Typical actions associated with this event:

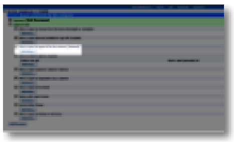
- *Send an e-mail to an administrator letting them know that a report is available for signing-off to the customer*
- *Automatically release the report to a customer*
- *Export report details to XML for external systems to process*

This event is triggered when a report is released. This

When a report is signed-off to the customer (Released)

indicates that not only has all the data been collected (complete) but it has been verified as being suitable for releasing to a recipient, such as a customer or local authority.

A complete report is released either manually on the web site or through an automatic status change action associated with the status "When a report becomes available for sign off (Complete)". In either case, any actions associated with this status will be triggered.



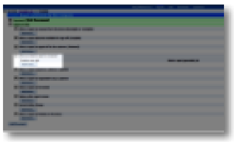
Typical actions associated with this event:

- *Send an e-mail to the customer, with or without the report attached*
- *Export report details to management statistics module*
- *Exporting data to third party software*

When an interim report is received

Interim reports are bespoke reports that represent snapshots of a form before it is finished on the device.

An example would be if a form related to a full ambulance journey. The form would not be complete until the vehicle had returned to base but administrators would need to know when certain milestones had been reached, such as picking up a medic, travelling to the patient, picking up the patient, travelling to a hospital, dropping off a patient and travelling to base (amongst other options). A single form keeps all the data in one place, but the interim reports can feed interim information into a third party system for vehicle or patient tracking, calculating turn-around times, etc.



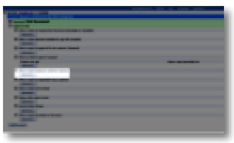
Each interim report contains all data currently input on the form, along with timestamps etc and is exported XML format.

Typical actions associated with this event:

- *Vehicle tracking*
- *Delivery tracking*
- *Job monitoring*

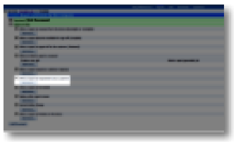
When a report requires a customer response

This is a bespoke status representing the point when a report requires a customer response. For example, a completed job sheet may need an order number to be allocated by the customer before an invoice can be raised. Setting the report to "awaiting customer response" will trigger an action that sends an email to the customer asking them to log in and add an order number. This will trigger the report to move to the next status.



When a report is responded to by a customer

This is a bespoke status that is triggered when a customer adds a response to a form of status 'awaiting customer response'. For example, a customer may enter an order number and an email is triggered to inform the office that the order number has been supplied.



When a report is forwarded

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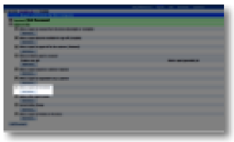

Option within report screen

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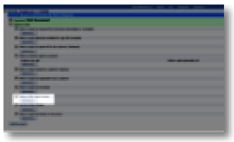

General status change

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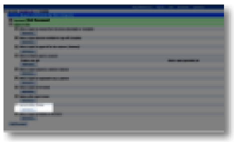

When a report is finished on the device

Actions here are triggered immediately prior to a report being released from the device. At this point the report is no longer editable or usable by the user but is still linked to the device. There is a separate set of actions for this status which includes generating additional forms or adding the data into a summary form.