Table of Contents

1 FAQs - Reports

1.1 Is there any way to stop the cover page being generated on the PDF form?

Yes.... this depends on the format of PDF being generated, so you need to change it for each template:

· Go to Maintain Templates and click on the template you want to change

· Click on the top line which says Template: xxx

· Click on the Report tab page and change the PDF format to be Standard – No Front Sheet or Standard – compact

· Save

You can specify up to four formats, each one will have its own button when you click on the report on the web site.

By default, any PDFs that are e-mailed automatically will use the first format that you've chosen in the list. But the e-mail "action" in the template can override this and use a particular format just for that e-mail.

1.2 How do I conditionally send a form to several people?

I have a form that needs to be sent to one of a number of people, depending on the answer to a drop-down list question. This can't use contacts etc because they aren't related to the location as such, just to the particular form that's been filled in.

The only way I can think of to do the four alternate e-mails is as follows:

· Create a list containing the 4 different contractors and add an item into the template to put this list on the form. Give it a unique name of, say, contractor

· In your list you'd have something like:

o Contractor A

o Contractor B etc

· Create a normal e-mail that will send to the customer and also one of the contractors (so in the "address to send e-mail to" you'd have something like person@contractorA.com)

· Then in the "Conditions (advanced)" page put in a condition like resultValue;contactor;equals;Contractor A

· Test it out with one of your own e-mail addresses and check that the e-mail is only sent when Contractor A is entered on the form

· Once you're happy that it works OK for contractor A, right click on the action and use Duplicate.

· In the new action, change the e-mail address to be that for Contactor B and change the condition to be resultValue;contactor;equals;Contractor B

· And so on

· NB. The spelling and spaces in the "resultValue" bit need to exactly match what's in the drop-down list

It's a bit messy but I think it'd work well.

1.3 How can I combine totals from several forms?

This can be done by adding completed forms on the phone to “summary” documents.

These can be daily, weekly or open-ended. Hence if, for instance, you cleaned 10 rooms in a day then at the end of the day you would have a document containing summary info for the 10. Sometimes the summary form is used for customers to sign, indicating that a long-term or complex job has been satisfactorily completed.

1.4 Will my completed and released forms be automatically sent back (provided there is a network connection available)?

There is a setting that controls whether it will automatically try and send the form back: go to **Maintain Templates**, **click on the template** and then on the "**Template: xxx" line at the top**. In the first tab there is a tick box to "Automatically send back finished reports". Ticking this box will send reports back automatically rather than waiting for the Send Reports function in the opening menu.

If there is no connection available when such a form is released from the device then it will try again a few minutes later. Further failures will cause further re-tries with diminishing frequency meaning that a form should come back "by itself" eventually.

Using the Send Reports option can be useful to force through any reports that are awaiting a re-try, or any reports which are not set to go back automatically and I would recommend that users do this at the end of the day, just to ensure that there's nothing outstanding.

1.5 Why would I use the Send Reports function if I have ticked the box to Automatically send back finished reports?

Even if you have set the template to automatically send the form back (**Maintain Templates**, **click on the template,** then on the "**Template: xxx" line at the top** and, in the first tab, tick "Automatically send back finished reports"), the Send Reports function on the device is useful.

If there is no connection available when such a form is released from the device then it will try again a few minutes later. Further failures will cause further re-tries with *diminishing frequency* meaning that a form will come back "by itself" eventually, but if users are operating in a zero signal area for any length of time it could be delayed even after they have returned to a strong signal area.

Therefore, Send Reports should be used at the end of the day and at regular intervals if your network connection is intermittent, particularly if a report is urgent or unexpectedly delayed. This will force through any reports that are awaiting a re-try, and avoid confusion over any reports which are not set to go back automatically.

1.6 Can I "email pdf version of report" to 2 addresses?

Yes.

You can specify any number of e-mail addresses, separated by a semi-colon (;) but no space, for example:

a@b.com;y@z.com;m@n.com

This is true for all e-mail entry fields.

1.7 If I delete a user are all the forms still stored?

Yes they are.

The name of the user will disappear from the drop-down list of users, so you won't be able to filter by the user's name. The forms will all still be shown though. If you want to have the user's name still there to filter by then you could just change the password to something long and complicated - the user won't be able to login anymore but their name will show up in the filter list.

1.8 Should I create a unique number on the device or on the server?

Create a unique number on the server		Create a unique number on the device	
Pros	**Cons**	**Pros**	**Cons**
Guarantees uniqueness throughout system - no duplication of numbers between devices Centralised numbers Guarantees no gaps in sequential numbers as report is completed before generation	Not available on the device in real-time Device needs a signal Delay while data transfers to server & number is generated	Available in real-time Easily uses user/device specific data as prefix Easily include customer data as prefix Starting number selected by user (gives control) Device user can give reference to customer immediately	No guarantee of uniqueness Starting number selected by user (potential duplication) Customer's reference may not be unique Gaps may occur if forms are discarded after number has been generated

We usually advise generating unique codes or numbers on the **server**. This guarantees uniqueness because each request goes through the same point one at a time so there's no chance of numbers being allocated at the same time.

However, this means that the **number isn't available on the device** as the form is being completed. The number is allocated by a "service" that runs in the background on the server, and this means that there may be **delay** of a few minutes - not usually a problem but it doesn't show up on the portal immediately so you may need to refresh the page.

Also, if the server is generating the number then the **device user needs a signal**. Plus there's not any guarantee about how quickly the number will be generated when a form is received (although it'll usually just be a minute or so).

Therefore, the server route is best for allocating system-wide numbers, but it's **not real-time** if the end user needs the number straightaway.

If you go down the **device-allocated number** route then you're never going to have 100% guarantee of uniqueness. You can generate a sequential number on the device and the "seed" number for this is specified when the first number is allocated – but users can potentially override this and put the wrong seed number in (and you can't take this ability away from them otherwise the seed number will always be 1 or whatever).

Despite this limitation about people potentially causing the software to generate the wrong sequence number, it's often a good solution. And you can **prefix the sequential number with a user specific code** (eg. initials).

Therefore we sometimes recommend using both:

1. On the **device** have a **user-specific**, **incrementing** number which the **user gives as their reference to the person that they're with**
2. On the **server** generate the **real unique number**
3. The number in (1) is usually sufficient as a reference for customer (along with things like date and time etc)

With the "seed" (starting) numbers it's often possible to give users their own values. This is prompted for the first time a number is generated (add in a "Calculated value" item and in the calculation put something like $seq:PORef). User 1 is told to put in 10000, user 2 20000 etc. The problem is that if the app is uninstalled then they have to re-specify it and they might not remember where they got up to.

Also consider **whether gaps are an problem** – the server route ensures that there won't be, but the with the device option it is always the possibility.

If we could assume that the user has a signal then it might be possible to have a "web service" or something where they tap a button and it goes off and gets the next number. Or (not as good) they submit one form to get a number, wait a few minutes for the server to update and then do an update to view the generated number.

list.

2 FAQs - Jobs

2.1 How can I allocate the same job to all members of a group?

Groups can be used in job allocation in the following ways:

- If you want to allocate one job to one person then tick 'Suppress prompt for Group' within Job Definitions so that the option to allocate to a whole group is not allowed for this Job Definition.
- If you wish to allow Group allocation for the Job Definition and a job is allocated to a group, then everybody in the group will get that job. By default the first person to complete the job will cause the job to close and be removed from everybody else’s work lists.
- However the “batch allocate” option in Job Definitions that means that everybody gets their own individual job and each job will be independent of the others - ie if one person completes their job, the other people's jobs remain incomplete. This can be handy for something like a company newsletter or bulletin, or if it’s some kind of alert that everybody needs to complete and sign.

3 FAQs - Form setup

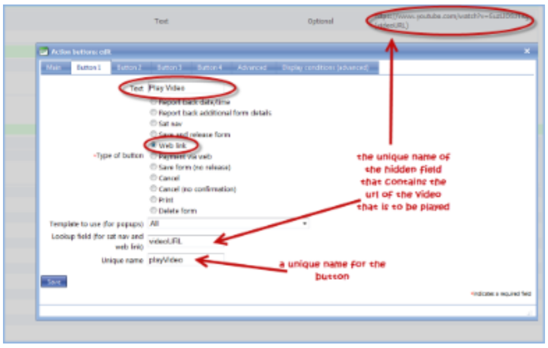
3.1 How do I make a single list item always appear?

When creating the drop-down list in your template (see **ItemType - Drop-down item (on-line documentation)**), select your list from the list of lists and tick the 'mandatory' box. This will ensure that there is always something in the box and, as there is only 1 item on the list it will always be the one you want.

This may seem as though it will never happen but it is a way of future-proofing a growing business or beginning to roll-out to a large workforce.

3.2 Can I launch a URL from a button on a device?

Add an **Action button ('Item Type - Action button' in the on-line documentation)** item type to the template and go to the Button 1 tab. Tick "web link" and, in the "lookup field", specify the unique name of the item that holds the URL to open. This means that the URL can be changed with a minimum amount of fuss.



The URL may be part of the job information that is sent down from the server, in which case the device user will not need to modify. However, if it is, or subsequently becomes, part of the information that is to be collected the field can become available to them to fill in themselves if the following method is used.

Create a **Text item ('ItemType - Text item' in the on-line documentation)** on the form and then put in a default value of the required URL - it may be possible to use

You could also hide the Text item by putting on a dummy **display condition ('Use display conditions to show/hide items or sections' in the on-line documentation)** like resultValue;xxx;equals;999, thereby preventing the device user from being able to amend it.