

**doForms™**

# **Android User Guide**

Updated July 20, 2012

A Product of doForms Inc.

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## Legal Notice

Your use of doForms, including online and offline components, is governed by the Terms of Use as specified at <http://www.doforms.com/terms-of-use>.

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## Contact Support

Email: [support@doforms.com](mailto:support@doforms.com)

Website: [www.doforms.com/support](http://www.doforms.com/support)

## Requirements

- Android OS Version 2.1 or greater
- Cellular or WiFi Internet connection
- Minimum of 2 GB of SD Card space free
- Touch-screen

## Overview

doForms provides “smart-forms” for Android-powered devices - everything you need in a turn-key, all-in-one, reliable, secure, and fully hosted mobile data collection solution.

Supported data types include:

- Section labels
- Page breaks
- Textual data
- Numeric data
- Calculations
- Date:Time
- Single choice answers
- Multiple choice answers
- Category scores
- Lookup tables
- Grid tables
- Barcode scanning
- Signatures
- Sketches
- Pictures
- Video recording
- Audio notes
- GPS locations
- Approvals
- Email reports

### Mobile Data Collection App

doForms mobile data collection software works with a wide selection of popular iOS, Android, BlackBerry smartphones and tablets; and it is coming soon to Windows. Unlike all browser-based forms, our mobile data collection software, or "mobile forms app", enables your workers to operate in both connected and disconnected environments. This is critical for workers in rural areas or urban settings with cellular dead spots. Imagine using your mobile data collection software to instantly take a picture, then sketch on top of it to illustrate something of interest; or to scan the barcodes of materials being delivered to a job site. Imagine recording audio notes and video clips and embedding them right in your electronic mobile data collection forms; or using the GPS to precisely record a location. Think about the increased speed and accuracy of reporting.

doForms provides a flexible, fast, and easy solution to deploying mobile data collection forms to your workers - anywhere in the world. And the mobile forms on your workers' devices are automatically synchronized and remotely kept up-to-date. Control who gets which mobile data collection forms.

Remotely control who can view or change the incoming data. doForms centralizes this control on a website dashboard to save time and money.

For paid accounts, your doForms mobile app can be branded using your company name and graphics.

## Data Website

doForms provides a fully integrated website for aggregating, sorting, querying, viewing and managing mobile forms data being collected by your workers. If GPS coordinates are included, your mobile forms data can be viewed on top of an interactive map. The website keeps track of which workers collected which mobile forms data. The website makes it easy to export mobile forms data to your other business applications, and to integrate your mobile forms data in real time with other IT systems by using web services.

Use our off-the-shelf mobile data collection forms library. Or create your own mobile forms using the most powerful, yet easy-to-use form creation software available. Our form builder provides simple and intuitive user interfaces for building mobile forms. You don't need to be a specialist to use our form creation software. You just need to have an understanding of what you want your mobile data collection software to do. With doForms, anyone with office software experience can create their own mobile data collection forms for Android devices. With doForms, there is no need for software programmers to build your mobile forms or IT support staff to deploy them.

doForms allows easy exporting of mobile forms information to other business applications such as Microsoft Excel, Open Office, Google Docs, and QuickBooks. Export options are also provided for CSV, HTML and PDF file formats. Additionally, doForms also provides for direct integration of your mobile forms with CRM, database and GIS systems, such as Salesforce.com, Oracle, SAP, and ArcGIS, through the use of industry-standard SOAP web services. These web services can be set up and deployed in a matter of minutes with no software programmers involved.

For paid accounts, your doForms website can be branded using your company name and graphics.

## doForms Dispatch

doForms Dispatch provides powerful dispatch forms and work order forms functionality. These special purpose forms contain important information to tell mobile workers where to go (dispatch) and what to do when they get there (work order). As your mobile workers complete their assigned tasks, doForms let them fill out data fields in the form, take pictures, capture GPS locations, and collect signatures. The completed data records are then sent back to you.

In addition to sending and receiving forms from your workers, doForms Dispatch also tracks their current and past GPS locations, and these locations are plotted on an interactive map in the Dispatch tab. You can select which workers to view, as well as the time interval. The map also shows the locations where forms were filled out.

Your doForms website account provides a specialized Dispatch tab where dispatch forms and work order forms can be filled out, managed, scheduled and sent to your mobile workers. The data sent back from your workers is also viewed in this tab, as well as the status of their assigned job. And your workers' past and present locations are shown on a map in this tab.

Dispatch data can also be sent from your existing dispatch and work order system, and forwarded via our Data Exchange Server to your doForms equipped mobile devices. Similarly, the completed forms can be sent from the mobile devices, and forwarded to your existing dispatch and work order system. Our Data Exchange Server makes this integration simple and quick.

### Security for Paid Accounts

The security of the doForms system is based on (i) data transmission encryption, and (ii) Google's App Engine IT infrastructure security.

Data transmission between your mobile devices and the doForms website is encrypted using Secure Socket Layers (SSL3). This protects your data while traveling over the airwaves or internet. Browsing of data on your doForms website may also be encrypted using SSL/HTTPS. Please be sure to use the **encrypted SSL3 connection** at <https://mydoforms.appspot.com> / **followed by the name of your doForms** website account.

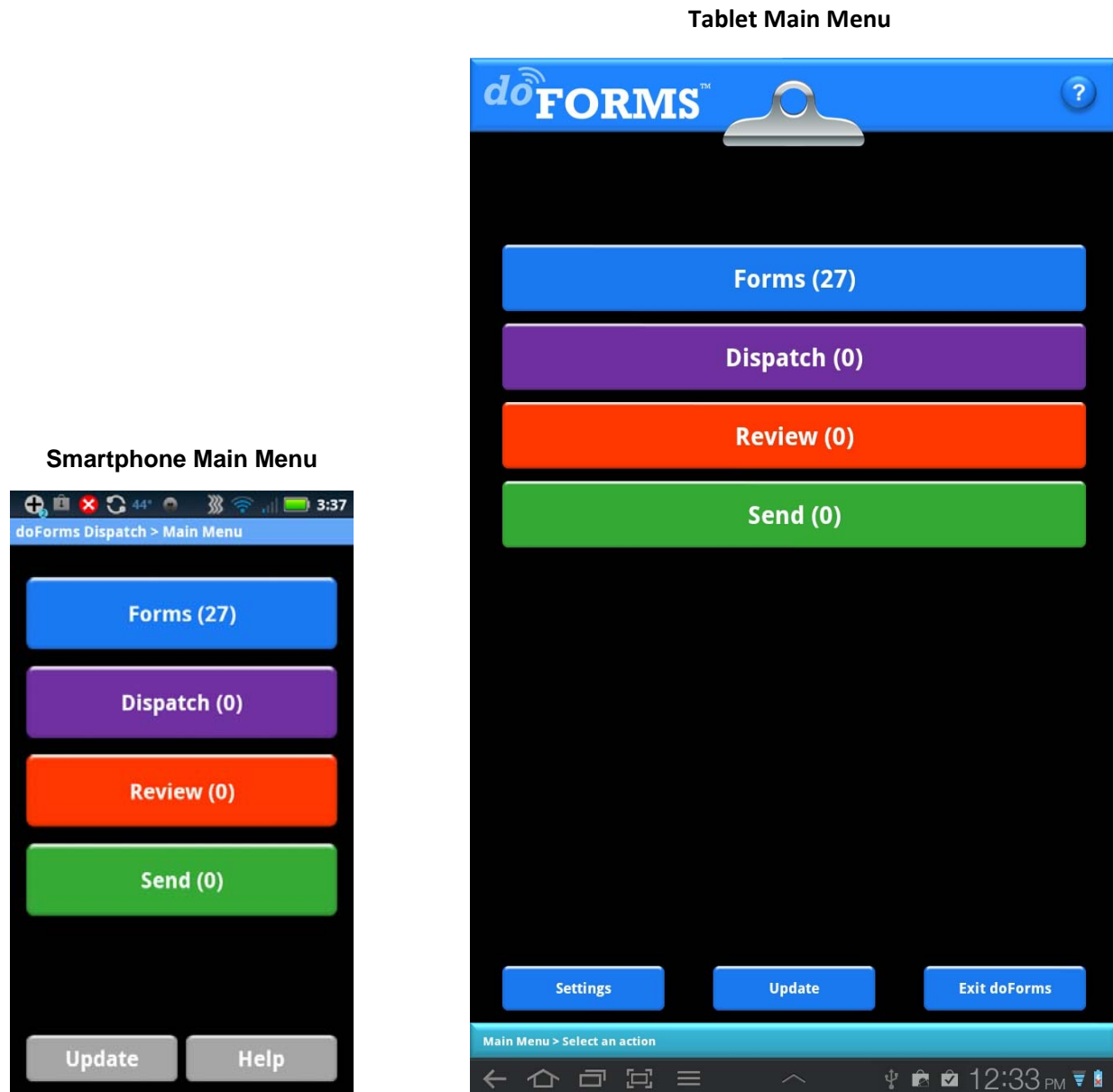
You can also have peace of mind knowing that your data and forms are hosted on top of Google's App Engine IT infrastructure. Google App Engine has successfully undergone annual [SAS 70 Type II](#) audits which have evolved into the [SSAE 16 Type II](#) attestation and its international counterpart, [ISAE 3402 Type II](#). Google App Engine is one of the first major cloud providers to be certified for compliance with these new audit standards.

Third party audits are only part of the security and compliance benefits of Google App Engine products. Google protects our customers' data by employing some of the foremost security experts, by executing rigorous safety processes, and by implementing cutting-edge technology. These protections are highlighted in the data center [video tour](#). For more information visit the [Google Apps Trust page](#).

Source: <http://googleenterprise.blogspot.com/2011/08/security-first-google-apps-and-google.html>

## Smartphone & Tablet User Interfaces

doForms provides different user interfaces (UI's) for Android smartphones and tablets. These user interfaces all render exactly the same form, but they take advantage of the different screen sizes and resolutions differently. For illustration purposes, this manual uses screen shots from the smartphone user interface. The following illustrations show the primary difference between the two. The branding for your doForms mobile app can be changed to reflect your organization's identity. This includes replacing the doForms logo graphic with your own. These branding options are managed in the Account tab of your doForms website.



## Tablet Form View



### Photo Survey

\*Required

#### Photo Survey

Use this form for making a photographic survey, including GPS coordinates and descriptions. Use this form directly as it is, or edit the form in the Build Forms tab of your doForms website to customize it.

#### Subject Description

Provide a description of the subject

#### GPS Location

Add a GPS location

#### Repeatable Section "Picture"

Picture (1)

##### Take a Picture

and add a sketch if you want

##### Add a Caption

to this picture

#### End of repeatable section "Picture"

#### Notes

Additional notes

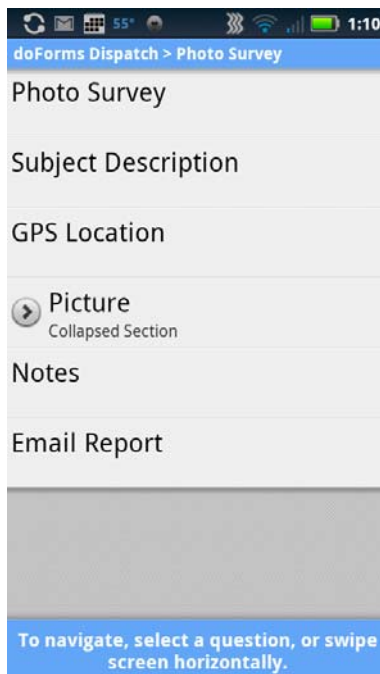
#### Email Report

Use this feature to email a report to a customer or coworker. Note that additional email and print options are available in the View Data tab on your doForms website.

Photo Survey > Swipe screen vertically to navigate, then tap on a question.



## Smartphone Form View



In Form View you can navigate between “pages” in your form by swiping the screen horizontally, or within a page by swiping the screen vertically.



## Tablet Question View

doFORMS™

Photo Survey

Subject Description

Provide a description of the subject

Save and Exit Form

Remember Answer

Clear Answer

Exit Without Saving

Delete Section

Form View

## Smartphone Question View

doFORMS Dispatch > Photo Survey

Subject Description

Provide a description of the subject

Swipe screen horizontally to navigate.

In the tablet user interface, you can tap outside the question area or press the “Form View” button to return to the form view. In the smartphone user interface, you can tap on the Android menu button and select the “Form View” option to return to the form view.

# Getting Started

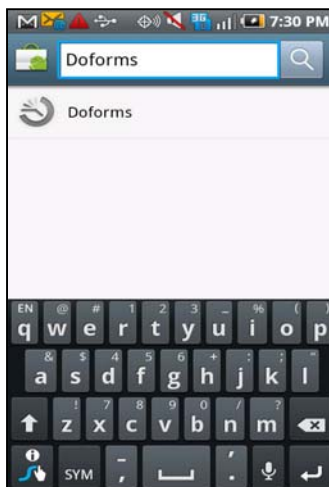
## 1.1 Downloading doForms

In order to install and use doForms you must first download the doForms application from the Android market.

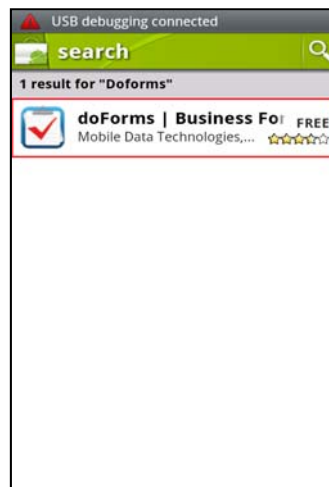
1. Tap the “Market” icon on your device.



2. Search for “doForms”.



3. Tap “doForms” on the results page.



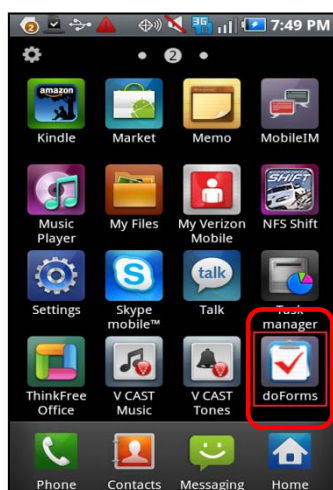
4. Tap “Free” to begin the download process.



NOTE: Downloading doForms is free for one (1) mobile device. For more than one, pricing is based on the number of devices on your account. Please visit [www.doForms.com/purchase](http://www.doForms.com/purchase) for complete pricing information.

5. Once you have read the permissions, tap “OK” to accept and continue.

6. doForms will now be automatically downloaded to your device. Once the download is complete the doForms icon will be visible on your Android’s application page.



# Setup doForms

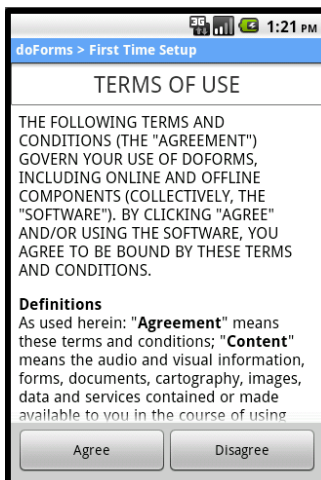
## 2.1 Launching doForms for the first time

**IMPORTANT:** You must have an active cellular or WiFi Internet connection in order to setup your account. If you do not have an active connection, press “**Cancel**” and restart the application when you do.

1. Tap on the doForms icon to launch the application.

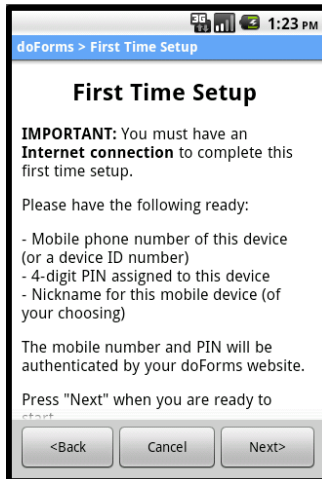


2. Select “**Agree**” after reading the TERMS OF USE.
3. Select “**Next**”, which will bring you to the First Time Setup Wizard.



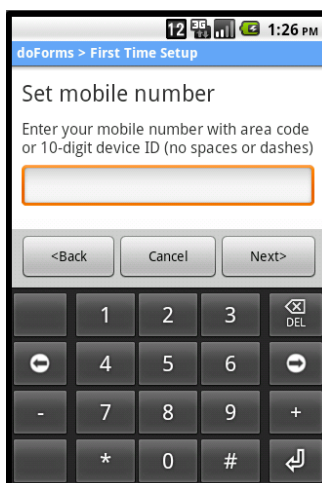
## 2.2 First Time Setup Wizard

1. Select “**Next**” to begin the setup process. On the next screen you will be prompted to enter the following three (3) items: mobile number, 4-digit PIN, and a nickname. At any time during setup you will be able to press “**Back**” to move back one screen or “**Cancel**” to end the First Time Setup Wizard.

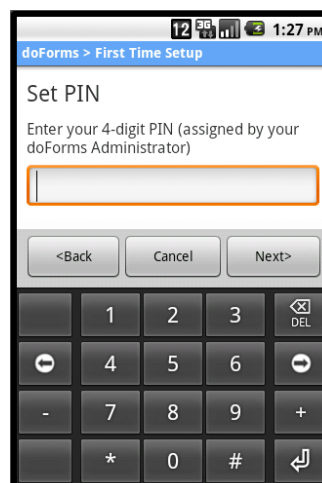


2. doForms uses a unique combination of “mobile number” and “PIN” to “link” each mobile unit to the doForms website. The mobile number can be either the cellular phone number of the mobile unit or a mobile ID number assigned by your doForms Administrator. We recommend that you use the cellular phone number unless you have been assigned a different mobile ID number by your doForms Administrator. The PIN number will be assigned by your doForms Administrator. This PIN must match the corresponding mobile number. Contact your doForms Administrator if you have not been provided with a PIN.

3. Press “**Next**” when done.



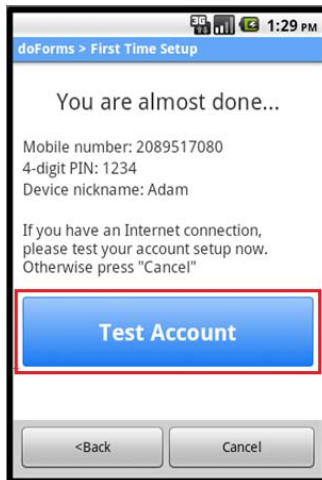
4. Press “**Next**” when done.



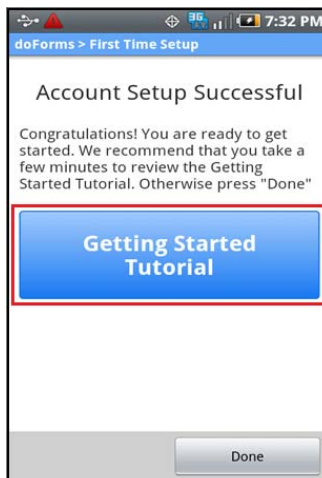
## 2.3 Test Your Account

In order to complete the setup you must test your account configuration. The doForms application on your Android device will contact the doForms server to validate your account setup. You will need to have an active Internet connection to complete this step. If you do not have an internet connection, press “Cancel” and restart the doForms application when you do.

### 1. Tap “Test Account”.

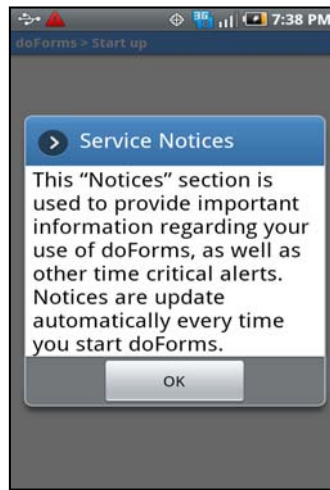
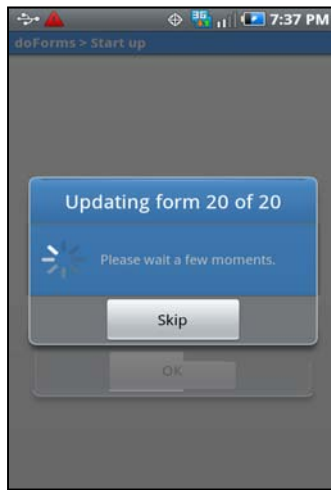


2. A “Test Successful” message will appear if the account setup was valid. Here you have the opportunity to view the “Getting Started Tutorial.” If you have not done so already, we recommend that you take a few minutes to view this now. Otherwise, press “Done.”



4. When you select “Done”, your Android device will automatically connect to the doForms website to search for and install any updated forms. It is recommended that you do not skip the update process during the initial setup.

5. After reading the “Service Notices” tap “OK” and the First Time Setup Wizard will be complete.

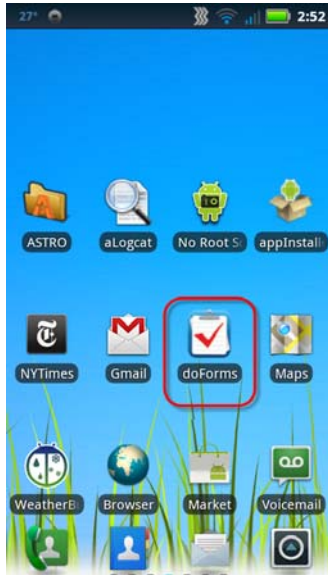


NOTE: A “Test Failed” message will appear if the account setup was not valid. Most likely you entered an incorrect combination of mobile number and PIN. Press “**Try again**” to restart the First Time Setup Wizard. You will need to re-enter your mobile number, 4-digit PIN and nickname. If you continue to experience problems, please press “**Cancel**” and contact your doForms Administrator to ensure that you have the correct mobile number and PIN.

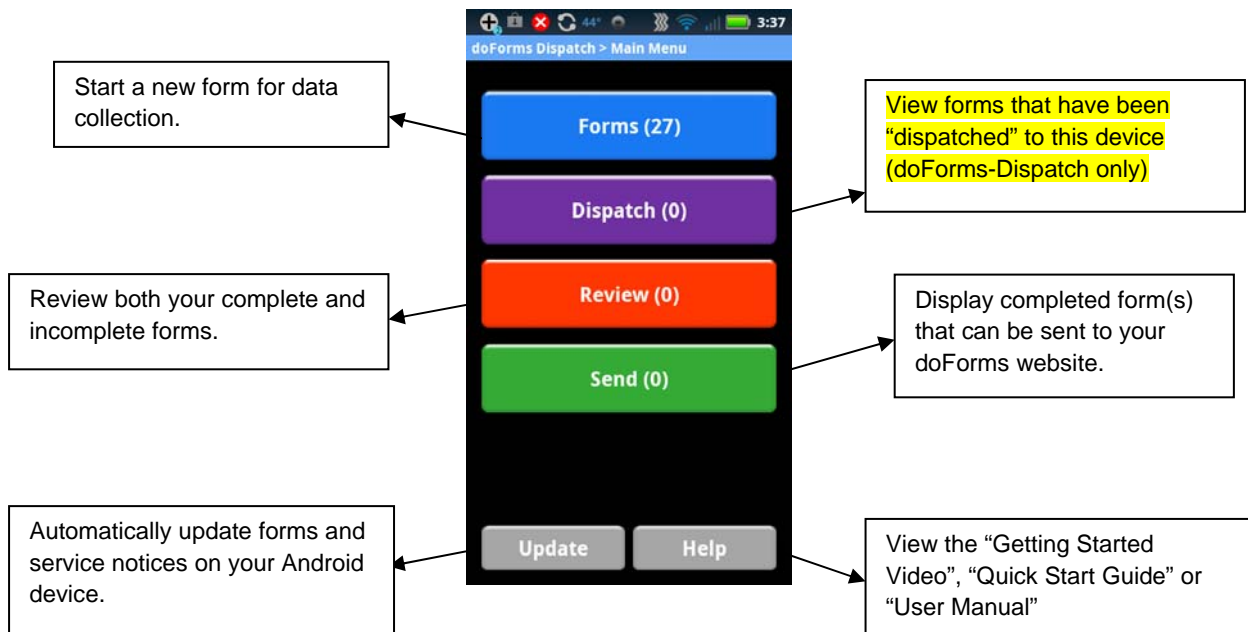
# Using doForms

## 3.1 Launching doForms on your Android device

1. Tap the application icon to launch the doForms.



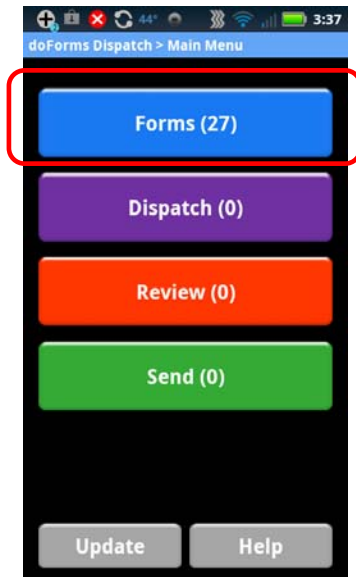
2. The doForms “**Main Menu**” will be displayed. Note that the Dispatch button will be present only if you downloaded “doForms-Dispatch”.



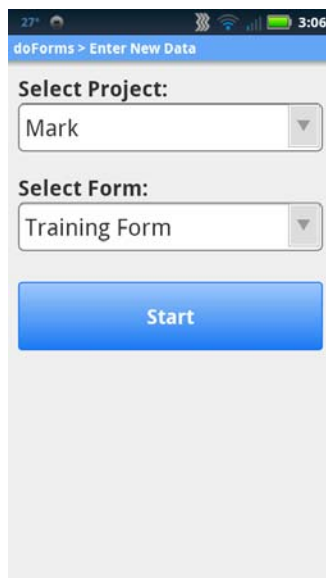


## 3.2 Enter New Data

1. From the Main Menu, tap **“Forms”**, (the number of available forms is listed in parentheses).



2. First, tap on the **“Select Project”** dropdown to choose a project from the list. All available projects will be listed (note that if you only have one project, the Select Project dropdown will not be displayed). Select the appropriate project from the list.



3. Select a form from the **“Form”** menu. Tap on the **“Select Form”** dropdown to view the list of all available forms associated with the previously selected project. T

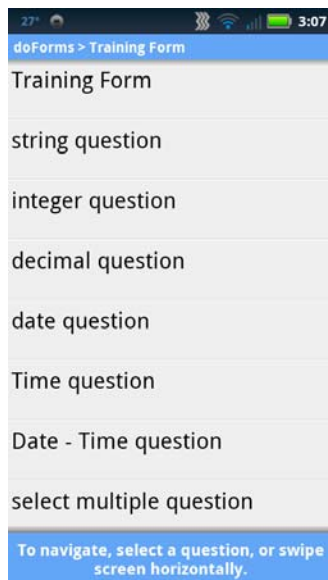
4. Tap **“Start”** to load the form.

5. It may take a few minutes for the form to be loaded onto your Android device.

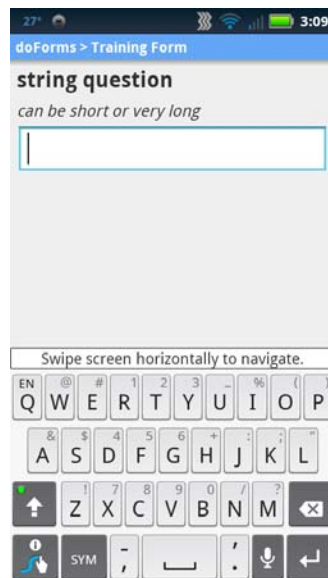
### Navigation Between Questions and Pages

The doForms mobile app provides two viewing modes: Form View and Question View. Use the **Form View** to quickly navigate the form by swiping the screen vertically. If the form contains page breaks, you can navigate between pages by swiping the screen horizontally as if turning pages forward or backward in a book. Navigate within a page by swiping the screen vertically. Tap on a specific question to open it in Question View.

**Form View**



**Question View**



Use **Question View** to more carefully navigate through a form, one question at a time. To move through the form in Question View, swipe your finger horizontally on the screen. You may press the **“Menu”** button at any point while working on a form to return to Form View.

In the smartphone user interface (shown above), you can tap on the Android menu button and select the **“Form View”** option to return to the form view. In the tablet user interface (not shown), you can tap outside the question area or press the **“Form View”** button to return to the form view.

### 3.3 Question Types

doForms utilizes many different question types in order to facilitate easy and accurate data collection. Each question type includes an appropriate format for answering the question. The following question types are supported:

- Section labels
- Page breaks
- Textual data
- Numeric data
- Calculations
- Date:Time
- Single choice answers
- Multiple choice answers
- Category scores
- Lookup tables
- Grid tables
- Barcode scanning
- Signatures
- Sketches
- Pictures
- Video recording
- Audio notes
- GPS locations
- Approvals
- Email reports

In addition to the possible data fields above, each form is stamped with a date, time and device ID whenever the form data is saved in the mobile device.

#### Section Labels

Section labels are used to organize the form and provide instructions. Swipe your finger horizontally on the screen to advance to the next question.

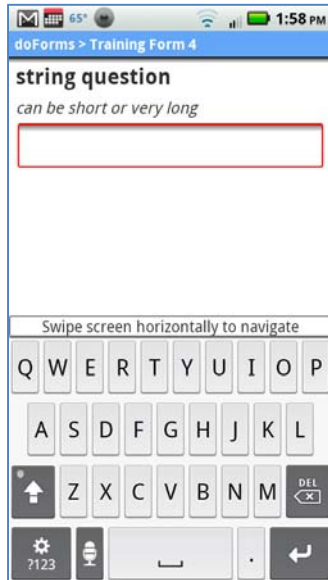
#### Approval Questions

Approval questions are not displayed in the doForms mobile app (only in the doForms website)

## Text Questions

This is a simple text question. You can use the virtual keyboard, which will be automatically displayed on your Android device, to answer these questions.

When done, swipe your finger horizontally on the screen to advance to the next question.



The screenshot shows a mobile application interface for a training form. At the top, the status bar displays '65°', signal strength, and '1:58 PM'. Below the status bar, the title bar reads 'doForms > Training Form 4'. The main content area is titled 'string question' with a subtitle 'can be short or very long'. A red rectangular text input field is positioned below the subtitle. At the bottom of the screen, a virtual keyboard is displayed with a message 'Swipe screen horizontally to navigate' above it. The keyboard includes letters Q through P, A through L, Z through M, and special keys for settings, voice search, a spacebar, a period/colon key, and a return key.

## Numeric Questions

A number question is presented in a similar format as a text string question. Instead of text you will answer the question by entering a number from the number pad, which will be automatically displayed on your Android device, to answer these questions. When done, swipe your finger horizontally on the screen to advance to the next question.

Notice that number questions may have “answer constraints”. In the example below,, the integer number entered must be greater than 10, and the decimal number entered must be greater than 10.51 and less than 18.39. Also, number questions expect either Integer or Decimal answers, and the ability to input a decimal point will be provided accordingly.

When done, swipe your finger horizontally on the screen to advance to the next question.

doForms > Training Form 4

**integer question**  
try entering a number > 10

Swipe screen horizontally to navigate

1	2 ABC	3 DEF	-
4 GHI	5 JKL	6 MNO	.
7 PQRS	8 TUV	9 WXYZ	DEL
* # (	0 +		

doForms > Training Form 4

**decimal question**  
only numbers > 10.51 and < 18.39

Swipe screen horizontally to navigate

1	2 ABC	3 DEF	-
4 GHI	5 JKL	6 MNO	.
7 PQRS	8 TUV	9 WXYZ	DEL
* # (	0 +		

## Calculation Questions

The calculation widget allows you to perform arithmetic ( $= + - / * \%$ ) operations on one or more previously entered Numeric question values in the form. The result of the arithmetic expression is stored in the calculation field.

In the example below, we have created a repeatable section for entering a list of parts used in a particular task. Each part has a Part Description, a Quantity and a Unit Price. The calculation widget is used to calculate  $\text{Quantity} \times \text{Unit Price}$  for each part.

Calculations are executed automatically.

### Enter Quantity

doForms Dispatch > Calculation Demo 1

Parts List (1)

**Quantity**

12

Swipe screen horizontally to navigate.

( ) 1 2 3 + -

€ \$ 4 5 6 \* /

% # 7 8 9 = ✕

👉 ABC , 0 . ↵ ↶

### Enter Unit Price

doForms Dispatch > Calculation Demo 1

Parts List (1)

**Unit Price**

9.95

Swipe screen horizontally to navigate.

( ) 1 2 3 + -

€ \$ 4 5 6 \* /

% # 7 8 9 = ✕

👉 ABC , 0 . ↵ ↶

**x**

**=**

### Calculate Subtotal

doForms Dispatch > Calculation Demo 1

Parts List (1)

**Part Subtotal**

119.4

Swipe screen horizontally to navigate.

## Date:Time Questions

Date:Time questions allow you to select a specific Date:Time, just Date, or just Time (depending on how the form was constructed). Use the “+” and “-” buttons to enter the date. You can also tap on a field (month, day or year) and use the number pad to input the value. Tapping the “**Now**” button allows you to quickly synchronize with the current Date:Time on your mobile device.

Notice that Date:Time questions may have “answer constraints”. In the example below, only future dates are allowed.

When done, swipe your finger horizontally on the screen to advance to the next question.

The screenshot shows a mobile application interface for a "date question". At the top, the status bar shows "65°" and "1:59 PM". The app header is "doForms > Training Form 4". The question title is "date question" with a subtitle "only future dates allowed". The date picker shows "Sep", "23", and "2011". The time picker shows "1", "59", and "43" with a "P M" toggle. A blue "Now" button is at the bottom. A footer instruction says "Swipe screen horizontally to navigate".

Note that Date:Time questions can be assigned an **Auto-Stamp** property when added to a form. When the auto-stamp property is active, the question will be displayed in Form View, but will be automatically executed in Question View. Depending on the speed of your device, you may or may not notice the auto-stamp being executed.

## Multiple Answer Questions

Multiple answer questions allow you to select one or more answers from a list. Press to check-off all the correct answers. You can scroll down the list if needed.

When done, swipe your finger horizontally on the screen to advance to the next question.

The screenshot shows a mobile application interface for a form titled "doForms > Training Form 4". The main heading is "select multiple question" in bold. Below it, a subtitle reads "pick once or more answer". There are four list items, each with a checked checkbox and the text "option a", "option b", "option c", and "option d" respectively. At the bottom of the form, a small instruction box says "Swipe screen horizontally to navigate". The top status bar of the phone shows the time as 2:00 PM and various icons for signal, battery, and connectivity.



## Choose-One Questions

Choose-One answer questions will allow you to select only one answer. Tap the corresponding radial button to select the correct answer. Scroll down the list if needed.

When done, swipe your finger horizontally on the screen to advance to the next question.

doForms > Training Form 4

**select one question**

*scroll down to see default selection*

- ☐ option 1
- ☐ option 2
- ☐ option 3
- ☐ option 4
- ☐ option 5
- ☐ option 6
- ☐ option 7
- ☐ option 8

Swipe screen horizontally to navigate

## Score Questions

Score questions are a special type of Choose One question. These questions are organized into "score categories" (when the form is developed). This question type also automatically calculates and summarizes the total possible score for each category, total given score, and percent of given divided by possible. These summaries are displayed in the mobile app at the end of the form.

When done, swipe your finger horizontally on the screen to advance to the next question.

doForms > Training Form 5

**score question**

category A score question - score summary is displayed at end of form

☒ good

☐ average

☐ poor

☐ Not applicable

Swipe screen horizontally to navigate

doForms > Training Form 5

**score question**

category B score question - score summary is displayed at end of form

☐ too bright

☐ just right

☒ too dark

☐ Not applicable

Swipe screen horizontally to navigate

doForms > Training Form 5

**Scores:**

Category	Poss.	Score	
Category A	5	5	100%
Category B	20	0	0%
<b>Total</b>	<b>25</b>	<b>5</b>	<b>20%</b>

Swipe screen horizontally to navigate

## Lookup Table Questions

Lookup tables allow you to search on and select an answer from an external data table. Additionally, if a lookup table row contains answers for other questions in your form, you can use the table to automatically answer these questions as well. For example, if your form contains questions for entering “Customer Number”, “Customer Name” and “Customer Address”, and if you have a lookup table that also contains these columns, then you can set up “Customer Number” as the Lookup Value, and when you search on and select a Customer Number, the corresponding Customer Name and Number Address will be automatically filled out in the form.

	A	B	C	D
1	CustomerNumber	NameFirst	NameLast	Address
2	100001	Dennis	Mills	13 Bright Street, Bangor ME
3	100002	James	Ragonese	147 Main Street, Bangor ME
4	100003	Jim	Farley	1356 Arlington Avenue, Portland ME
5	100004	Howard	Runser	47 Dudley Street, Hampden ME
6	100005	Danny	Hancock	986 State Street, Old Town ME
7	100006	Tom	Shumway	63 Elm Avenue, Hampden ME
8	100007	Stephen	Nearing	19 Maine Hwy, Newport ME
9	100008	Robert	Netsch	481 Central Street, Bangor ME
10	100009	Robbie	Wilson	19 Long Warf Lane, Searsport ME
11	100010	Kevin	Twombly	20 Forms Avenue, Herman ME

### Lookup Table Question

### Automatically Filled Value

### Automatically Filled Value

TIP: Using the Lookup Table question feature on your device takes a little bit of practice. If you have problems getting the selection list to display, try tapping lightly and quickly on the entry box, or try typing in the first few characters to search the lookup table.

## Grid Table Questions

A table is a grid format “**container**” for text, lookup, numeric, and calculation question types. Tables can have up to 10 columns. A fixed number of rows must be specified in the properties area. Note that this grid table format only renders in Form View and only in the doForms tablet user interface (shown below). In the smartphone interface, due to screen size limitations, tables will render in the same format as repeatable sections.

To navigate a grid table in the tablet user interface, tap in any of the grid cells. The corresponding question will be displayed in Question View. You can navigate to the next cell by navigating Question View horizontally (which will zig-zag through the form). Or, you can return to Form View and tap on any other cell directly.

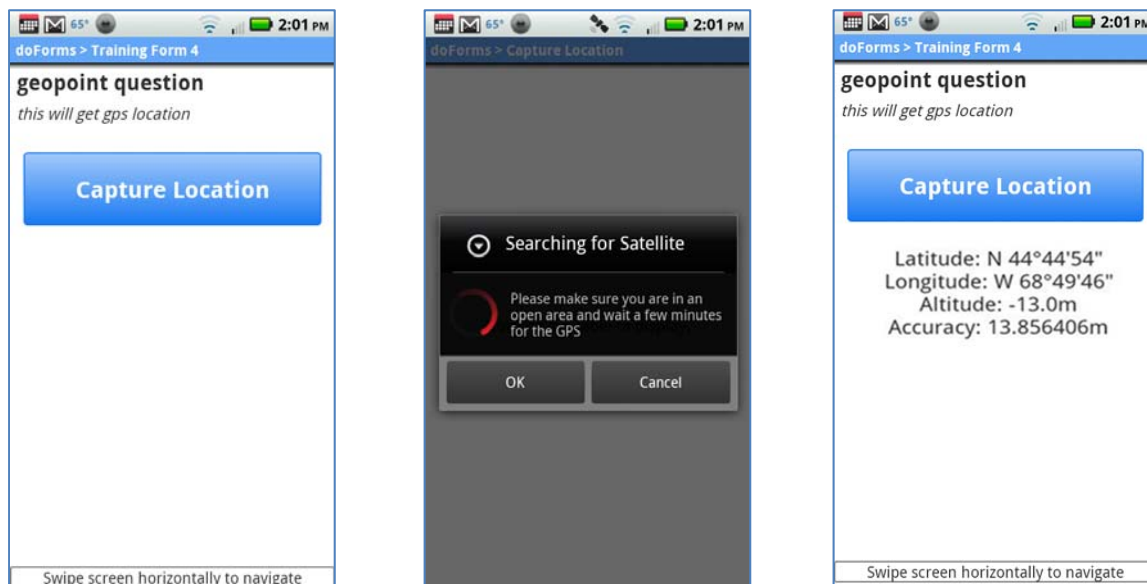


The image shows the doFORMS tablet user interface. At the top is a blue header with the 'doFORMS' logo, a clipboard icon, and a help button. Below the header is a red asterisk and the word 'Required'. The main content area is titled 'Store Facings Table' and contains a grid table with 4 columns: Product, Snack, Ethnic, and Drink Mixes. The table has 20 rows. At the bottom of the screen are three buttons: 'Save as Incomplete' (blue), 'Save as Complete' (green), and 'Exit Without Saving' (red).

Product	Snack	Ethnic	Drink Mixes

## GPS Location Questions

Location questions are used to capture a GPS location. First, tap the **Capture Location** button. A message will appear to indicate that doForms is searching for GPS satellites. This may take a few moments so be patient. GPS coordinates and their estimated accuracy will start being displayed when the GPS satellites have been “acquired”. Tap **Ok** when you are satisfied with the location accuracy. The location data will be saved as latitude and longitude coordinates.



Note that in some situations it may not be possible to acquire a GPS signal at all due to interference from a building or some other physical feature, and the “Searching for Satellites” message will continue to display indefinitely. In such cases, press **Cancel** and move to a more open location and try again.

The “achievable” GPS accuracy will depend on your hardware, location and surroundings. In most cases, the best achievable accuracy will be around 3 meters. doForms is programmed to automatically stop refining the GPS position when an accuracy of 5 meters has been achieved. Altitude readings are generally accurate to +/- 25 meters on most consumer devices.

**IMPORTANT:** In cases where doForms detects that GPS hardware is not available on the mobile device, Location Capture questions will be skipped automatically. This usually occurs because the GPS has not been “enabled”. To enable the GPS on your Android device:

1. Tap on **Settings**
2. Tap on **Location and security settings**
3. Make sure that under **My Location** the “**Use GPS satellites**” checkbox is checked
4. Restart your device
5. Try doForms again.

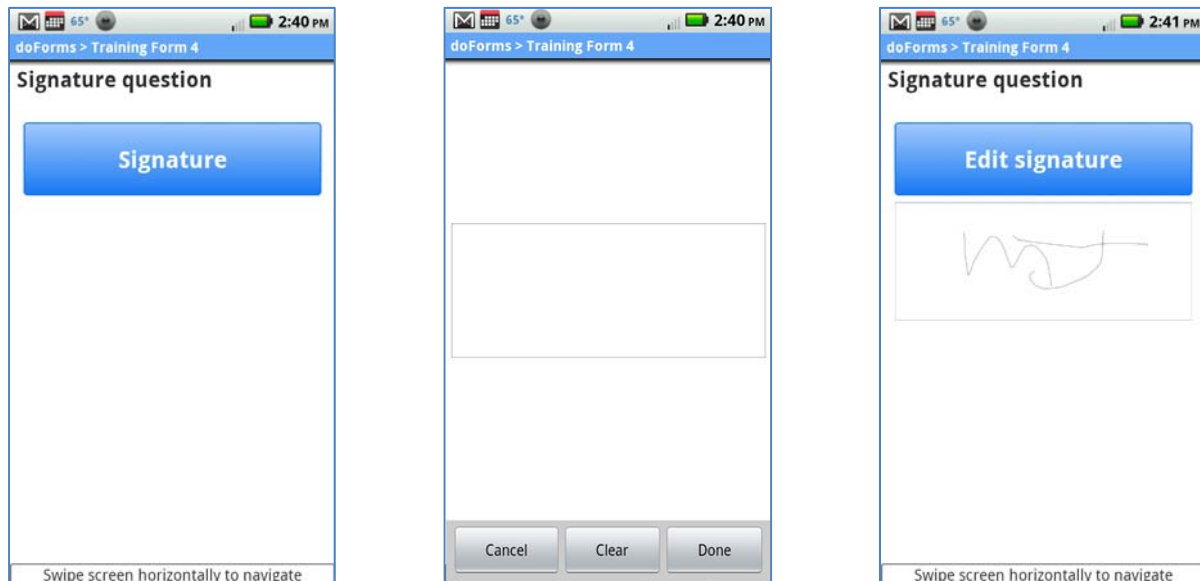
If this is a “Required” question, save the form as “Incomplete”, then try one of the remedies above.

Note that GPS location questions can be assigned an **Auto-Stamp** property when added to a form. When the auto-stamp property is active, the question will be displayed in Form View, but will be automatically executed in Question View. Depending on the speed of your device, and strength of GPS signal, you may or may not notice the auto-stamp being executed.

### Signature Questions

Signature questions are used to capture a signature. First, tap the **“Signature”** button. Now you can use a stylus or finger to draw your signature in the designated area. Press the Clear button to erase the signature and start over. Press **“Done”** when complete. The completed signature will be displayed.

When done, swipe your finger horizontally on the screen to advance to the next question.

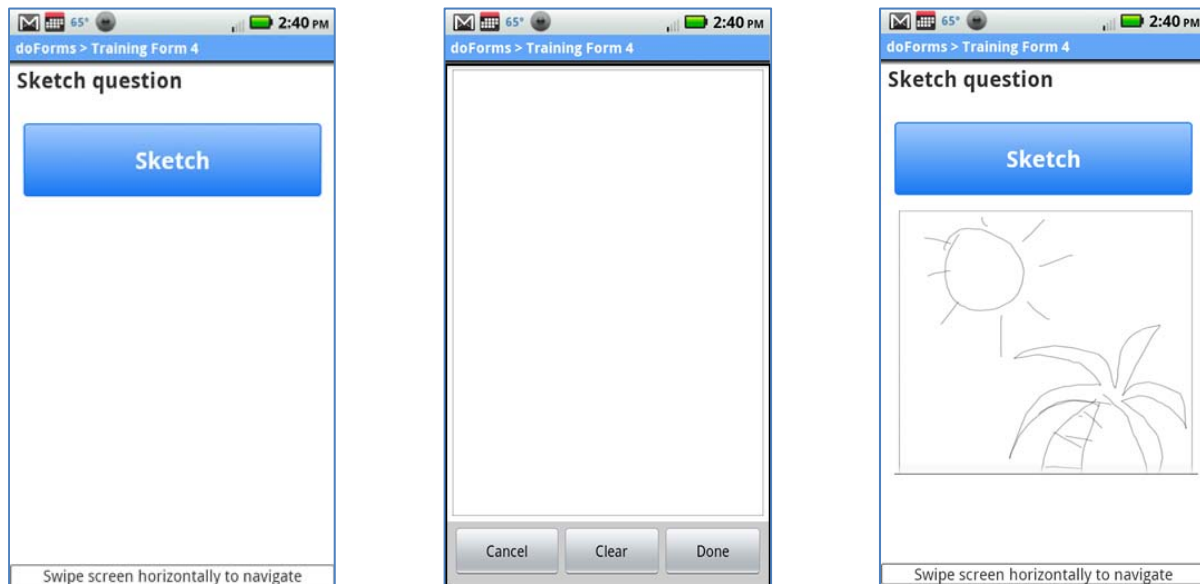


**NOTE:** In cases where doForms detects that a drawing surface is not available on the device, signature questions will be skipped automatically (even if it is a required question).

## Sketch Questions

Sketch questions are similar to signature questions in allowing you to capture a sketch. First, tap the **“Sketch”** button. Now you can use a stylus or finger to sketch in the designated area. Press the **“Clear”** button to erase the sketch and start over. Press **“Done”** when complete.

When done, swipe your finger horizontally on the screen to advance to the next question.

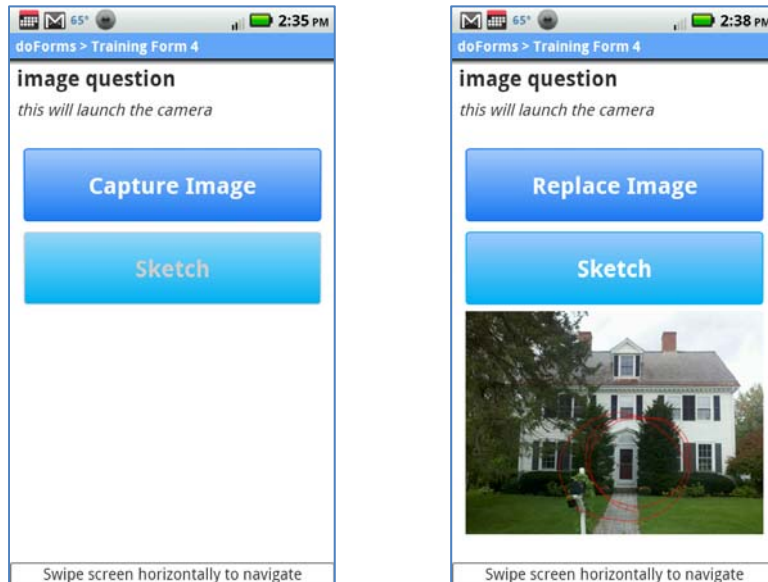


NOTE: In cases where doForms detects that a drawing surface is not available on the mobile unit, sketch questions will be skipped automatically (even if it is a required question).

## Picture Questions

Picture questions allow you to capture an image. Tap “**Capture Image**” to start the camera application on your Android device. Once the camera has opened, point your device using the screen view finder and tap the shutter button to take a picture. Once the picture has been taken you can view the image, or choose to “**Replace Image**” with a new picture.

When done, swipe your finger horizontally on the screen to advance to the next question.



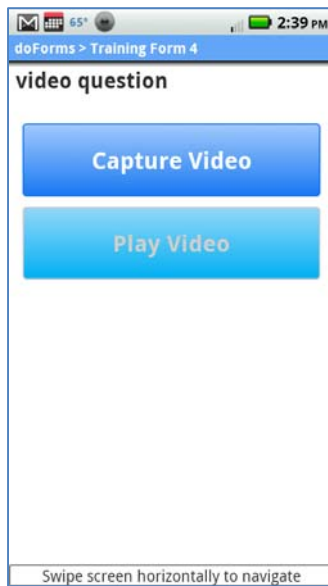
NOTE: Once an image has been saved, you can tap the “**Sketch**” button if you wish to sketch atop the picture. This is useful for pointing out features of interest in the picture which may otherwise be difficult to see. In cases where doForms detects that a camera is not available on the mobile unit, picture questions will be skipped automatically.



## Video Questions

Video questions allow you to capture a video. Tap **“Capture Video”** to start the camera application on your Android device. Use your device’s screen viewfinder plus **“Record”**, **“Play”** and **“Stop”** buttons to record and review the video. A thumbnail will be displayed and you have the option to tap **“Save”** and save the video, or **“Discard”** to replace the video with a new recording. After saving the video you will have the option to **Replace Video** with a new recording or **Play Video** to review the recording again.

When done, swipe your finger horizontally on the screen to advance to the next question.

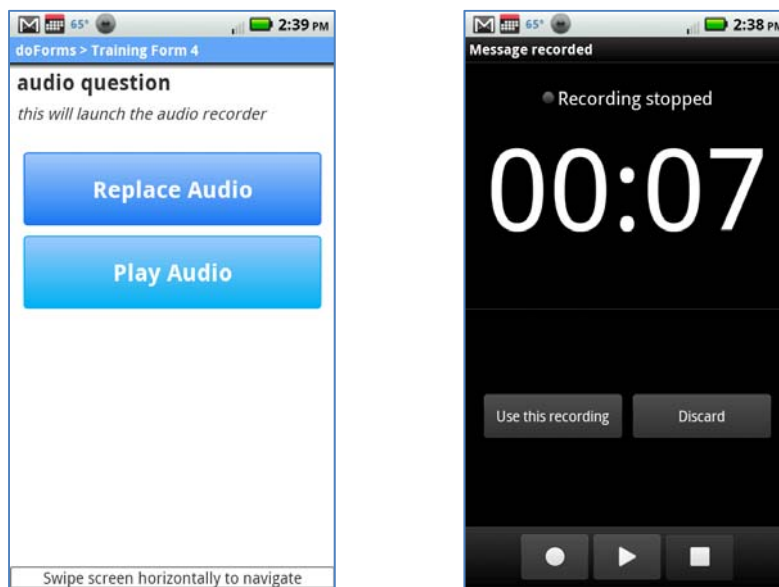


NOTE: In cases where doForms detects that a camera is not available on the mobile unit, picture questions will be skipped automatically.

## Audio Questions

Audio questions allow you to capture an audio recording. Tap **“Capture Audio”** to start the camera application on your Android device. Once the camera has opened, you may have the option to choose which device will be used for recording. By tapping the check box, you can set doForms to use the selected application by default.

Use the **“Record”**, **“Play”** and **“Stop”** buttons to record and review the audio. When you are happy with your audio recording, tap **“Use this recording”** to save the audio, or **“Discard”** to replace the audio with a new recording. After saving the audio you will have the option to **“Replace Audio”** which will replace the audio recording with a new recording or **“Play Audio”** to review the recording again.



When done, swipe your finger horizontally on the screen to advance to the next question.

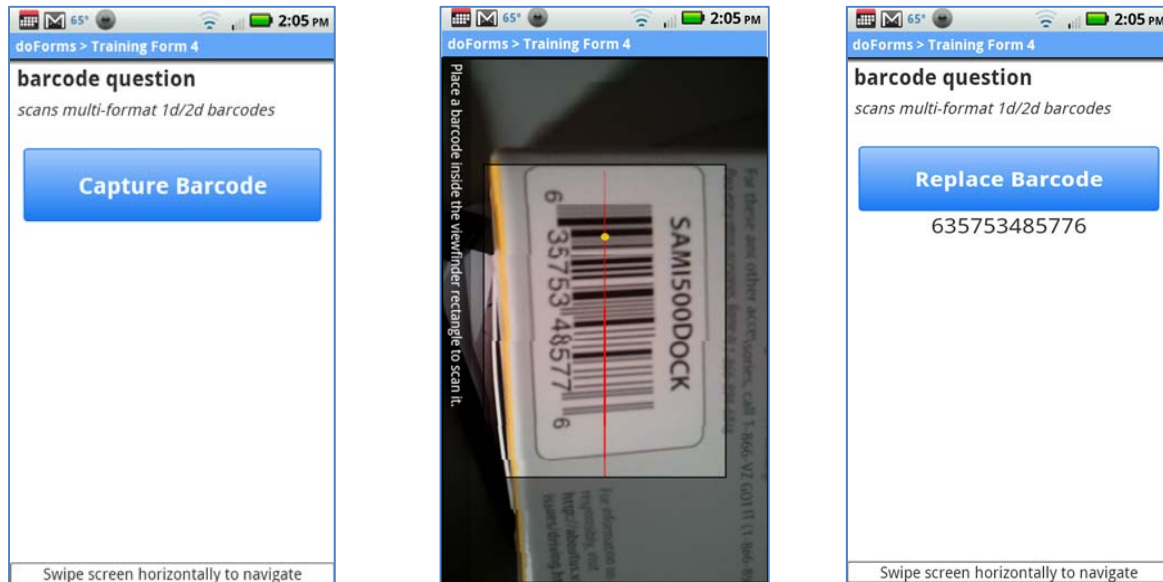
NOTE: In cases where doForms detects that a microphone is not available on the mobile unit, audio questions will be skipped automatically.

NOTE: There is a known issue with certain Samsung Android devices that is preventing the doForms mobile app from recording using the device's audio recorder. There is no known solution to this problem. However, a reliable alternative is to record video clips and use the audio in these clips. A list of devices with this problem can be found at <http://www.doforms.com/requirements.htm>.

## Barcode Questions

Barcode questions allow you to capture a barcode. Tap the “**Capture Barcode**” button to start the barcode scanning application. Place the barcode you want to capture inside the viewfinder to scan it.

When done, swipe your finger horizontally on the screen to advance to the next question.



NOTE: In cases where doForms detects that a barcode scanner is not available on the mobile unit, barcode questions will be skipped automatically.

## Email Report

Emails the completed form as a PDF or Excel report to one or more recipients in addition to sending it to your doForms website. Enter an email address (or multiple addresses separated by semi-colons) and an optional message. The email is sent automatically when the completed form is received by your doForms website.

When done, swipe your finger horizontally on the screen to advance to the next question.

doForms > Training Form 4

**Email PDF Report**

*Email report to your supervisor*

Email Report to:

Optional Message:

Swipe screen horizontally to navigate

q w e r t y u i o p

a s d f g h j k l

z x c v b n m

?123 @ . ↩

## Saving Data

When you reach the end of a form, you will have the choice to either **“Save as Incomplete”**, **“Save as Complete”** or **“Exit Without Saving”**. If you select either **“Save as Incomplete”** or **“Save as Complete”**, you will be prompted to correct any questions with invalid answers. If you select **“Save as Complete”**, you will also be asked to complete any “required” questions not previously answered. Only forms marked as “Complete” can be sent to your doForms website (see Section 3.6 Send Completed Data).



The **“Save and Send”** option allows you to send the form to your website with one click.

You may also save and exit a form at any time by pressing your device’s “Menu” button (see Section 3.4 Data Collection Features) and selecting one of the exit options.

## 3.4 Data Collection Features

### Repeatable Sections

A repeatable section is a “container” for one or more of any of the questions above. A repeatable section loops through the questions it contains. A maximum number of loops can be specified when the form is built. Mobile users will be prompted before each loop if they wish to continue. Therefore, the actual number of loops performed will be controlled by the mobile user. Also note the repeatable sections can be “nested” within one another. Nested repeatable sections provide a very efficient way to enter long lists of information; for example, an inventory of part numbers (inner loop) located on a particular shelving unit in a warehouse which contains multiple shelving units (outer loop).

#### First loop



The screenshot shows a mobile form titled "doForms > Training Form". At the top, "Group a (1)" is highlighted with a red box. Below it is a "Name" field with the label "Input your name". The text "Bob" is entered in the field. At the bottom, there is a keyboard and a navigation bar with the text "Swipe screen horizontally to navigate."

#### Second loop



The screenshot shows the same mobile form titled "doForms > Training Form". At the top, "Group a (2)" is highlighted with a red box. Below it is a "Name" field with the label "Input your name". The text "Ted" is entered in the field. At the bottom, there is a keyboard and a navigation bar with the text "Swipe screen horizontally to navigate."

When advancing from one instance of a repeatable section to the next loop, a dialog will be displayed asking you if you would like to repeat the loop. Select **Yes** or **No**.

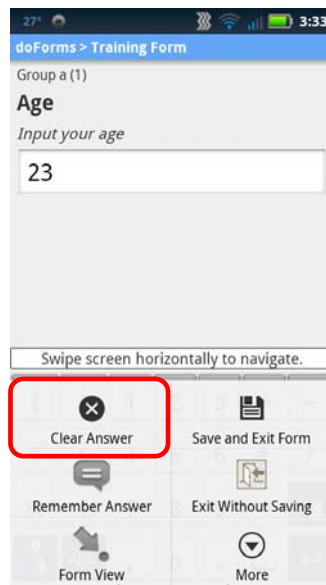
**Delete Section** – When working inside a repeatable section this option will be available in the Menu. Using this option will clear all the data in the questions in the current loop.

## Clear an Answer

doForms allows you to edit or delete any question at any time while filling out your form. You can use your device's on-screen keyboard to delete any answers given for a text or number question. You can also delete an answer to a single or multiple choice question.

To clear an answer:

1. Navigate to the question with the answer that you want to clear.
2. Press your device's **"Menu"** button.
3. Tap **"Clear Answer"**.
4. Tap **"Yes"** to confirm.

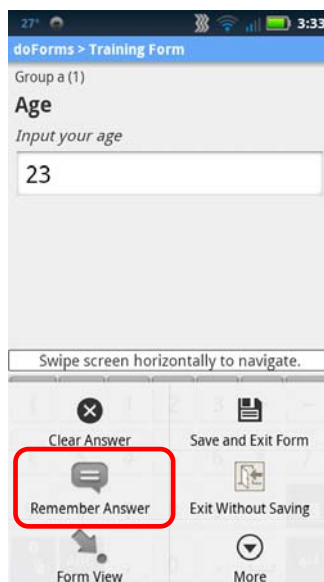


## Remembering Answers

doForms provides a feature for automatically remembering answers to specific questions. This should be used in situations where you know you will be repeating an answer over and over when filling out new instances of a form. For example, if you are a census worker canvassing houses on a specific street, you would use the “**Remember Answer**” to remember the city and street names.

To remember an answer:

1. Answer the question with the value you wish to remember.
2. Press your device’s “Menu” button at any point after selecting the answer value for a question.
3. Tap “**Remember Answer**”.
4. Tap “**Yes**” to confirm.



NOTE: The “**Remember Answer**” option will supersede any “Default Value” that has been set by the form’s author (the “remembered answer” becomes the new default). Also, you can override the remembered answer by choosing a different answer to the question. If at a later time you wish to remember a different answer, repeat the steps above.

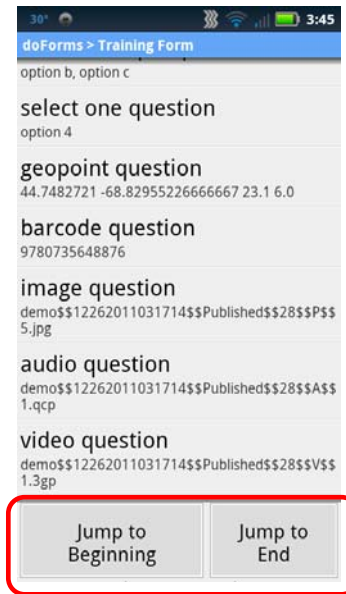
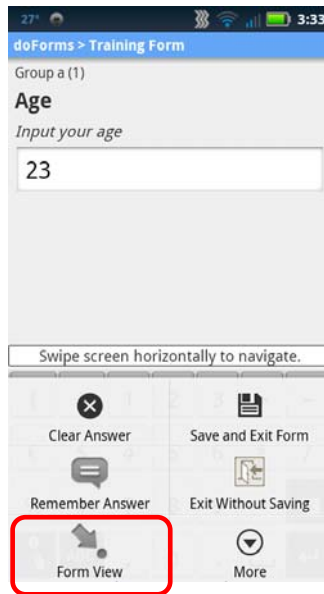


## Jumping to a Question

doForms provides a feature that allows you to “Jump” to a specific question. This should be used in situations where you need to skip ahead or go back to answer a question without having to flip through each question in between.

To jump to a question:

1. Press your device’s **“Menu”** button at any time while within the form.
2. Tap **“Form View”**.



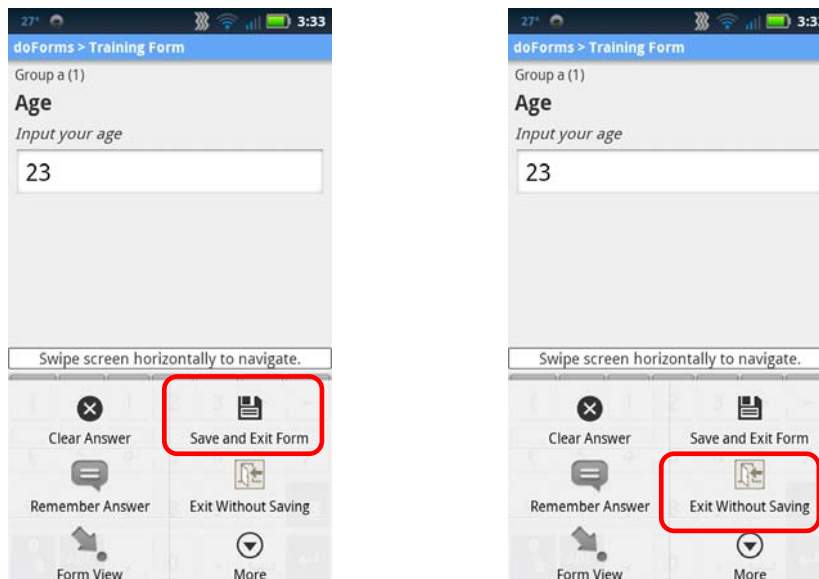
3. A list of all the questions contained in the form will be displayed. Use your finger to scroll the list up and down if needed. Tap on a question in the list to jump to that question. You also have the choice of **“Jump to Beginning”** which will return you to the beginning of the form, or **“Jump to End”** which will bring you to the end of the form.

## Exiting a Form

You can choose to exit a form at any time while collecting data. This should be done when, if for any reason, you need to stop the data collection process. You can choose to exit the form and save the data you have collected up to that point, or you can choose to exit the form without saving.

To exit a form:

1. Press your device's **"Menu"** button at any time while within the form.
2. Tap **"Save and Exit Form"** to save all data collected on the form up to that point and exit the form.
3. Tap **"Exit Without Saving"** to simply exit the form. None of the data collected in the form will be saved.



## Settings

See the "Setting" section below for information regarding Settings and how to change your account setup and preferences.

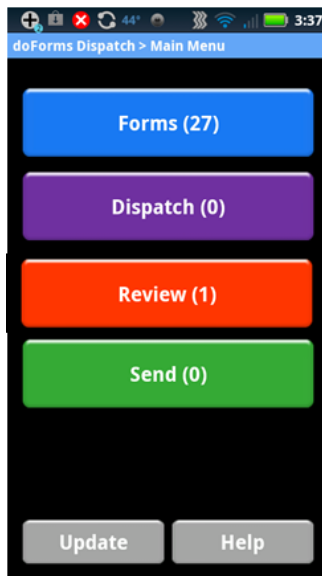
## Delete Section

When working inside a repeatable section, this option will be available in the Menu. Using this option will clear all the data in the question in the current loop.

## 3.5 Review Saved Data

doForms allows you to review and edit your saved forms at anytime.

1. From the Main Menu, tap **“Review Saved Data”** (the number of saved forms is listed in parentheses).
2. Tap **“Incomplete”** to view incomplete forms, or select **“Complete”** to view completed forms.



3. Tap the name of the form that you wish to review.
4. The form is loaded and a list of all the questions and answers contained in the form will be displayed. This may take a few minutes. Use your finger to scroll the list up and down if needed. Tap on a question in the list to jump to that question. You also have the choice to **“Jump to Beginning”** which will return you to the beginning of the form, or **“Jump to End”** which will bring you to the end of the form.
5. Make the desired edits.

The Review page also provides the following functions:

**Select All** – Select all the forms listed on the page.

**Delete** – Delete all selected forms.

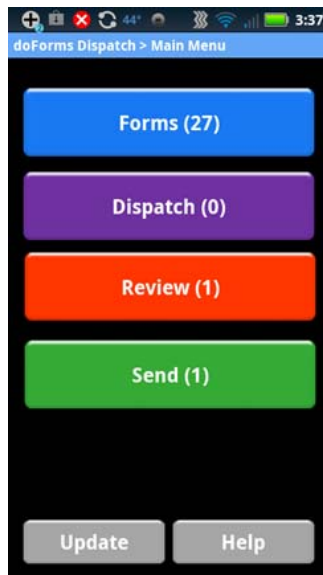
**Sort** – Sort listed forms alphabetically (repeat to reverse order)

**Search** – Search the listed forms for those that match the search criteria.

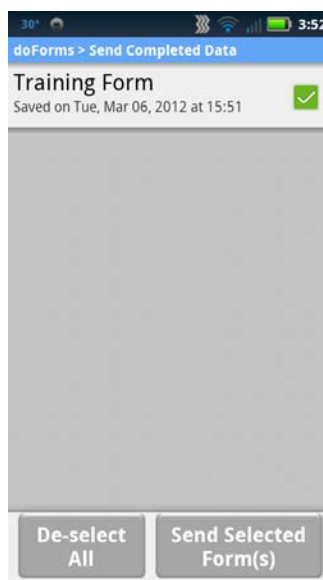
## 3.6 Send Completed Data

**IMPORTANT:** You must have an active cellular or WiFi Internet connection in order to send data. If you do not have an active connection, press **“Cancel”** and restart the application when you do. We recommend waiting for a WiFi connection if your completed forms include media content (pictures, sketches, video or sound).

1. From the Main Menu, tap **“Send Completed Data”** (the number of completed forms is listed in parentheses). Only completed forms will be displayed on the **“Send Completed Data”** page.

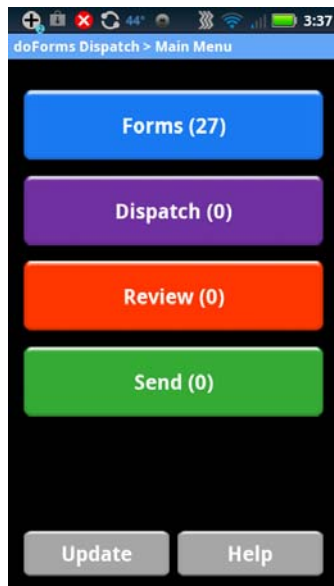


2. Select the forms that you wish to send by tapping on the corresponding checkbox (or you can choose to **“Select All”**).



3. After choosing the appropriate forms, tap “**Send Selected Form(s)**”. You will need an active connection in order to complete the sending process. Otherwise, a message will be displayed asking you to try again when you do have an active connection.

4. Tap “**OK**” to return to the Main Menu. Successfully sent forms and related media content are automatically deleted from your mobile unit to save storage space.

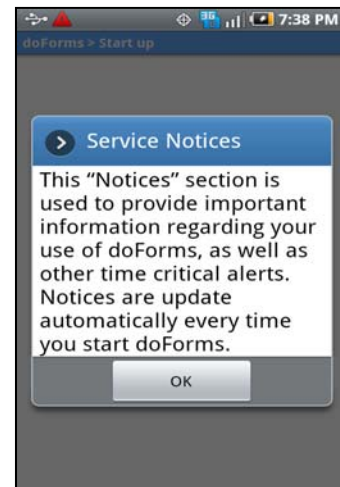
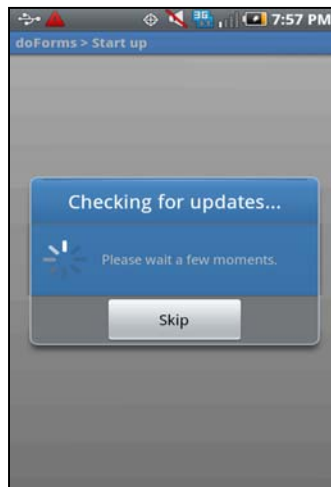


**NOTE:** In cases where you have a slow connection speed (i.e., no 3G or Wi-Fi) and want to send your completed forms, doForms will only send the non-media portion of the completed forms. The much larger media portion (pictures, sketches, video or audio) will be saved on your mobile unit until a faster connection is detected, at which point it will be automatically sent to your doForms website.

### 3.7 Update Forms & Notices

**IMPORTANT:** You must have an active cellular or WiFi Internet connection in order to search for and install any updated forms. Press **"Skip"** if you do not have an active connection and try again when you do.

From the doForms Main Menu, tap **"Update Forms & Notices"**. doForms will automatically connect to the doForms website to search for and install any updated forms. You can cancel this process at any time by tapping **"Skip"**. Tap **"Done"** once all projects and forms have been updated. After reading the "Service Notices" tap **"Ok"** to begin using your updated forms.



# doForms-Dispatch

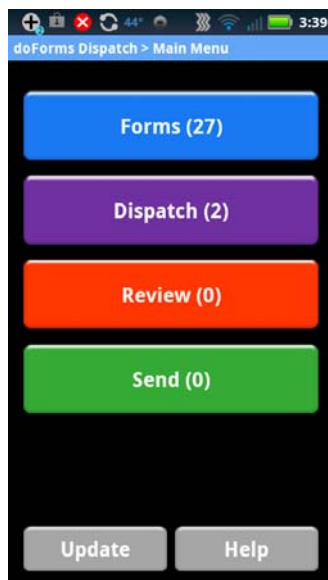
## 4.1 Overview

doForms-Dispatch provides powerful dispatch forms and work order forms functionality. These special purpose forms contain important information to tell mobile workers where to go (dispatch) and what to do when they get there (work order). As your mobile workers complete their assigned tasks, doForms lets them fill out data fields in the form, take pictures, capture GPS locations, and collect signatures. The completed data records are then sent back to you. In addition to sending and receiving forms from your workers, doForms Dispatch also tracks their current and past GPS locations, and these locations are plotted on an interactive Tracking Map. You can select which workers to view, as well as the time interval. The map also shows the locations where forms were filled out.

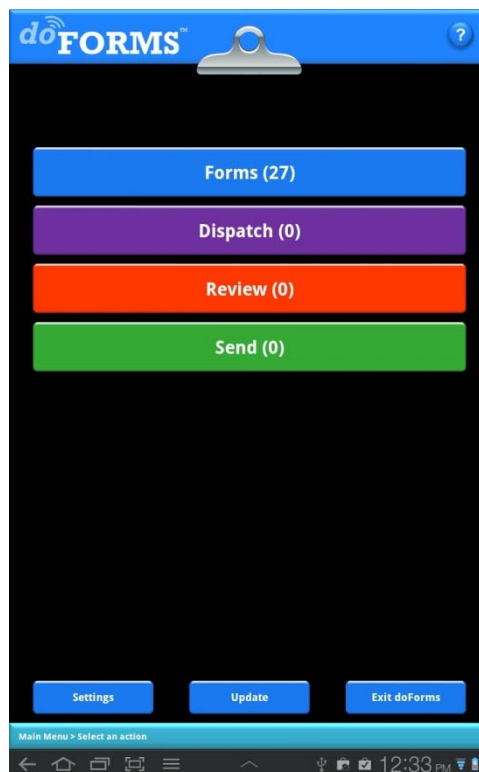
## 4.2 Using

The illustration below shows the doForms-Dispatch main menu. Note that except for the new Dispatch button, all functionality is the same as doForms-Professional. So we will focus on how to use this new button.

**Smartphone Main Menu**



**Tablet Main Menu**

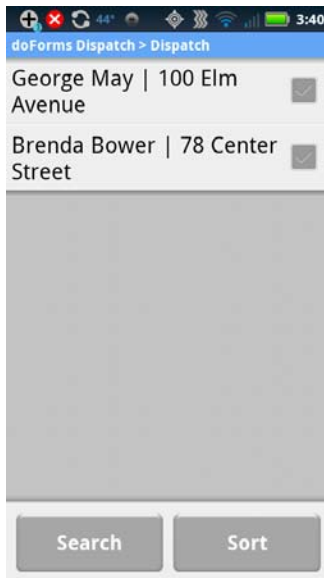


The number count “(2)” indicates that two “dispatches” have been sent to the device. If your device has a “Notification Ringtone” set, an audio alert will occur when a new dispatch has been received.

To enable the Notification Ringtone on your device:

1. Go to the **Setting** menu of your Android device.
2. Select **Sound settings**.
3. Select **Notification ringtone**.
4. Select a **Ringtone** and click **OK**.

Click on the Dispatch button to view a list of dispatches. Tap on the desired dispatch to open it, then fill it out as with any other form.



The Dispatch page also provides a Search feature which is useful if trying to find a specific Dispatch from a long list (see below). To use this feature:

1. Tap the **Search** button. A search page will be displayed.
2. Select a **Project**.
3. Select a **Form**.
4. Select a **Question** in the form.
5. Enter an **Answer**.
6. Tap **Search**. The matching Dispatches will be listed.



doForms Dispatch > Dispatch > Search

Search Condition:  
Remember ☒

Project:  
Mark

Form:  
Simple Work Order  
Dispatch 7

Question:  
Customer

Answer:  
George May Barcode

Search

## 4.3 Tracking

Tracking occurs in the “background” and requires that the device has Internet connectivity (cellular or wifi) to send GPS tracking points to your website.

For privacy reasons, tracking is turned OFF until enabled by the mobile user. To ENABLE tracking:

1. Press your device’s **Menu** button at any time to access **Settings**.
2. Tap **Tracking**.
3. Select the desired Interval.

The tracking feature consumes significant battery life - both to collect the GPS coordinates as well and to transmit them to your doForms website. For this reason, we recommend using the longest duration tracking interval setting that is acceptable to your particular tracking objectives. Alternatively, we recommend that the tracking feature is used only when the device is plugged into an automotive charger.

Mobile devices can be very sensitive to placement, orientation and obstructions when reading GPS coordinates. If using in a vehicle, placement on the dashboard usually works best.

The doForms tracking function WILL continue to collect and transmit GPS points if you leave the doForms app without “Exiting” or “Closing” the program (for example, if you click on the Home button and check your email).

The doForms tracking function WILL NOT continue to collect and transmit GPS points if the screen turns off and the device goes into “power saving mode”. To prevent this:

1. Tap on **Settings**.
2. Select **Display**.
3. Select **Screen Timeout**.
4. Select the desired setting.

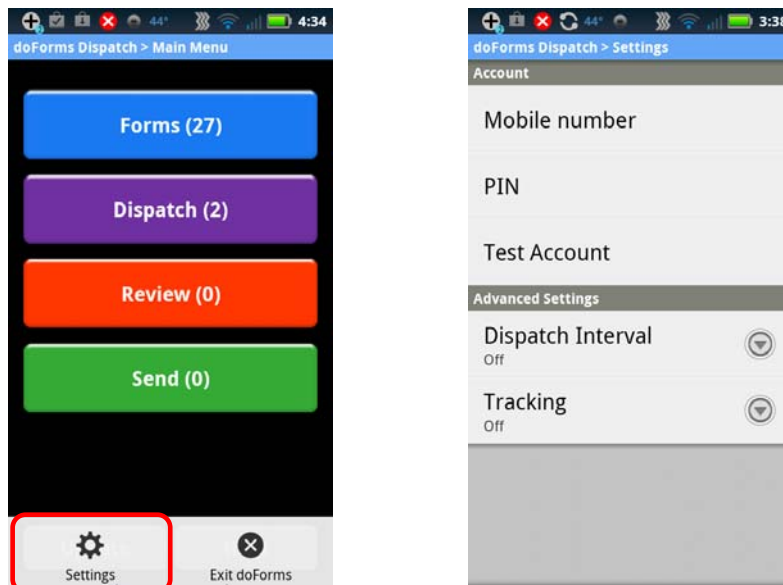
Finally, be sure that GPS has been “enabled” on your Android device. To check:

1. Tap on **Settings**.
2. Tap on **Location** and security settings.
3. Make sure that under My Location the “**Use GPS satellites**” checkbox is checked.
4. Restart your device.

# Settings

## 5.1 Changing your account setup and preferences

Press your device's **"Menu"** button at anytime to access **"Settings"**. However, we recommend only changing your settings from the Main Menu and not from within a form while collecting data. From the **"Settings"** page you can set your mobile number, PIN, and nickname, as well as test your account.



### Setting your device's mobile number

1. Tap **"Mobile number"** on the **"Settings"** menu to edit the phone number.
2. Enter the phone number of this unit or a mobile ID number assigned by your doForms Administrator. Include the area code if using a phone number. Do not include any spaces, dashes or any other non-number characters. Tap **"OK"** when done.

### Changing the mobile unit's PIN

1. Tap **"PIN"** on the **"Settings"** menu to edit the PIN.
2. Enter the 4-digit PIN assigned by your doForms Administrator. This PIN must match the corresponding mobile phone number or mobile ID. Contact your doForms Administrator if you have not been provided with a PIN. Tap **"OK"** when done.

### Testing Account

The doForms application on your Android device will contact the doForms server to validate your settings. You will need to have an active Internet connection to complete this step. If you do not have an internet connection, press “Cancel” and restart the doForms application when you do.

1. Tap “**Test account**” on the “Settings” menu.
2. Tap the “**Test Account**”.
3. An “Account Setup Successful” message will appear if the account setup was valid. Tap “**Done**” to get back to the “Settings” menu.

NOTE: A “Test Failed” message will appear if the account setup was not valid. Most likely you entered an incorrect combination of mobile number and PIN. Tap “**Cancel**” to return to the doForms “Settings” menu and re-enter your mobile number and PIN. If you continue to experience problems, please tap “**Cancel**” and contact your doForms Administrator to ensure that you have the correct PIN to match your mobile number.

### Dispatch Interval (doForms-Dispatch only)

doForms-Dispatch provides a setting option for controlling how frequently the app “polls” your doForms website to see if any Dispatches are pending and should be downloaded. By default this is set to one minute. To change this setting:

1. Tap “**Dispatch Interval**” on the “Settings” menu.
2. Select the desired interval.

### Tracking Interval (doForms-Dispatch only)

doForms-Dispatch provides a setting option for controlling how frequently the app reports the GPS location of the device to your doForms website. For privacy reasons, by default this is set to OFF. To change this setting:

1. Tap “**Tracking**” on the “Settings” menu.
2. Select the desired interval.

IMPORTANT: The tracking feature consumes significant battery life - both to collect the GPS coordinates as well and to transmit them to your doForms website. For this reason, we recommend using the longest duration setting that is acceptable to your particular tracking objectives. Alternatively, we recommend that the tracking feature is used only when the device is plugged into an automotive charger.

### Backup Purge Schedule

doForms- provides an automatic data backup feature where your completed forms are saved on the mobile devices after they have been “sent” to your doForms website. Use the “Purge Schedule” option to specify if backups are to take place, and how long to wait before automatically purging a backed-up form in order to manage storage space. Use the “Purge All” option to purge all backed up data on the device.

## How to Contact doForms Support

Email: [support@doforms.com](mailto:support@doforms.com)

Website: [www.doforms.com/support](http://www.doforms.com/support)