

# ADMINISTRATION ESSENTIALS

## **FOR NEW ADMINS**

Comprehensive and hands-on, Administration Essentials for New Admins is the core training that ensures your success with GoFormz.

It's a must for new administrators. We recommend administrators take this course before starting a GoFormz deployment or when taking over an existing deployment.

## **WHO SHOULD TAKE THIS COURSE?**

Administration Essentials for New Admins is designed for:

- New system administrators responsible for the setup, configuration, and maintenance of their organization's GoFormz application
- Other groups that would benefit from deepening their knowledge of GoFormz, including power users, reporting users, and IT managers.

All you need is a computer with an internet connection (web browser).

## **WHEN YOU COMPLETE THIS COURSE YOU WILL BE ABLE TO:**

- Customize your GoFormz application, including templates, workflow, and business processes
- Setup and manage all variations of field types
- Optimize the GoFormz mobile experience for your users
- Setup and manage users and groups
- Maintain and import templates
- Create high-value reports
- Set up automation

## **PREREQUISITES:**

There are no prerequisites for this course.

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## Templates

Templates are the GoFormz version of your existing forms which allow you to capture data in your account, and can be reused an unlimited number of times. Templates are created by uploading your existing document, either paper or electronic, then adding a variety of field types to capture data the way you want to

A GoFormz Template is a master version of your form. This is where you define what fields go into your form, name your fields, lay them out, set default values, etc. Once the template is built, you can create individual forms based on it. From a permissions standpoint -- typically, only a few users in your GoFormz account have access to editing templates, whereas all users can fill out a form.

The starting point for a template is a paper form. To create a template, you upload your paper form's image into GoFormz, then overlay electronic fields on top of that image to let GoFormz know where the user inputs should go. This results in a form template that looks just like your paper form, but is much more functional and easier to work with.

## Key Properties

Here are some key terms and definitions to help you better understand GoFormz templates:

Template vs form: If a Template is the blank master version, then a Form is an individual instance of that template that you actually fill out. Each individual form is based on a template. See here for more on the Forms vs Templates distinction.

Form fields: GoFormz supports many different field types, from common ones like text fields and checkboxes, to fields that don't have an analog in paper forms -- like images and GPS location. See here for more on available field types and how to use each one.

Field properties: Properties control the look and feel, layout, and functionality of each field in your form. See here for more on field properties.

## Key functionality

Here are some highlights of what you can do with form templates:

Create templates to mimic your paper forms

Populate your templates with fields that best fit the information you want to capture

Configure your electronic form's layout in both the Form View and the List View.

Set up template folders to control user access to different templates

Automate workflows for forms created from your templates.

## Templates Tab

The Templates Tab lists all the templates and template folders that you can access from your account. Folders have an icon next to them, to differentiate them from templates.

To create a new template, click the Create Template button in the upper right.

To create a new template folder, click the New button in the upper right.

To edit a template, click on that template's name in the list.

To view the templates inside a template folder, click that folder's name.

## Individual template actions

To the right of each template/folder name is the Actions dropdown, which contains a set of actions that you can perform on that item. Click on the action name in the table below to learn more about that action. The New Form, Public Share and Duplicate actions are available only for templates; the Edit and Delete actions are available for both templates and folders.

### \* New Form

Create a new form based on this template.

### \* Public Share

Share this form template to an external user via a Public Share URL.

### \* Edit

There are two actions that can be performed on multiple templates at once -- Delete and Move. The former will delete several templates at once, and the latter will move several templates into a template folder. To use these bulk actions, check the boxes to the left of your template names. New Delete and Move buttons will appear at the top. Click one of these buttons to perform the associated action.

Note that these actions can only be performed on templates, not on template folders.

## Template Folders

Template folders are used for two key purposes:

Controlling access: They let you control which users are able to access which templates.

Organizing templates: They make it easier to keep track of all your forms by organizing them by function or by some other convenient distinction.

For instance, suppose your GoFormz account has some human resources form templates and some form templates to be used during fieldwork. In this scenario, you may want to set up two template folders called “Field Forms” and “HR Forms”, then set up your permissions so that your HR employees only have access to the HR templates, and field techs only have access to the field technician templates. Finally, place the appropriate forms in each folder to complete the setup.

Below, we go over how to create/edit/delete template folders, how to set their permissions, and how to move form templates into and out of these folders.

### Create a new Template Folder

Create new Template Folder. Navigate to the Templates Tab and click the New button at the top to launch the Create Folder dialog box.

Name the folder. Enter a name for the folder. In the example below, the folder is called “Field Forms”.

Create Folder

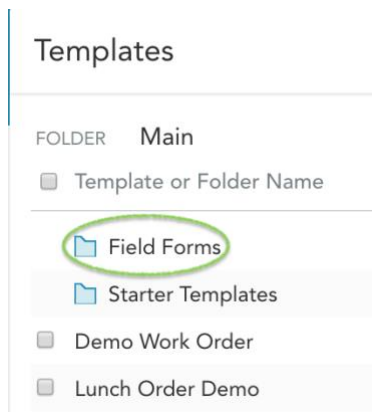
×

Name:

Field Forms

Save Changes

Save your folder. Click Save Changes to finish creating the folder. Your new folder will immediately appear in the Templates Tab.



## Moving templates into and out of a folder

DashboardFormsTemplatesReportsMore

Help & SupportTrial Days Remaining 14Alexis

Templates

Bulk ActionsDeleteMoveNewCreate Template

FOLDER Main

GoFormz

Template or Folder Name

Field Forms

Starter Templates

☒ Demo Work Order

☒ Lunch Order Demo

☐ Read Me

☐ Sample Work Order

☐ Templates Quick Start Guide

Actions

...

...

...

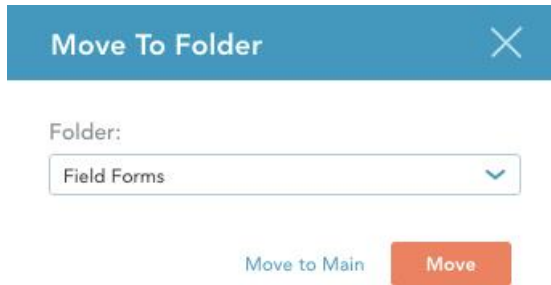
...

...

...

To move a form template into or out of a folder, check the boxes next to the templates that you want to move. In this example, we've selected the Field Work Order and Job Safety Checklist templates. Then click the Move button at the top.



In the Move to Folder dialog that opens:





To move the selected templates into a folder, choose the folder from the dropdown menu and click Move. In the example below, we've selected the "Field Forms" folder.

To move the selected templates out of a folder and back to the top level, click the Move to Main button.

## Editing a template folder

To change the name or permissions of an existing template folder, expand the  Actions dropdown next to it and select  Edit. You will see an Edit Folder window displaying the folder settings. Change the settings as needed and click Save to save your edits.

## Deleting a template folder

To delete a folder, expand the  Actions dropdown next to it and select  Delete. Then click Yes in the confirmation dialog box. Deleting a folder will not delete any of the templates in the group -- it will simply move those templates out of the group to the top level.

## Templates

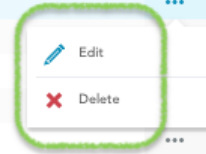
New Create Template

FOLDER Main

Template or Folder Name

Actions

- Field Forms
- Starter Templates
- Read Me
- Sample Work Order
- Templates Quick Start Guide



## Creating a New Template

The form template is the master version of your form. Creating a template is the first thing that you must do before you can start using any other GoFormz functionality. This document goes over the basic steps of creating a template, with links to more detailed articles about the various steps of the process.

To create a new form template in GoFormz, do the following:

Create Template

Drag and drop

OR

Browse

Upload a PDF or JPG version of your form. The maximum file size is 5MB

Template name

Enter a unique name

Need additional help? See these [helpful hints](#) or [contact support](#).

Cancel Create Template

Upload a form PDF/JPG into your template. The template creation begins with uploading your paper form into GoFormz. To do this, navigate to the Templates Tab and click the Create Template button in the upper right to launch the Template Upload dialog box.

Enter the template's name in the Name field. Click Browse Files in the Template Upload dialog and select your PDF or JPG form from the file chooser. Then click the Upload button to complete

the upload.

**Add and position form fields:** Now that you've uploaded your form, you have to tell GoFormz where on the form the fields are located, and what kind of fields they are. This is needed to determine where on the form users will need to click or tap in order to fill out each individual field, and what kind of input control will show up once they do so. To do this, drag fields from the Template

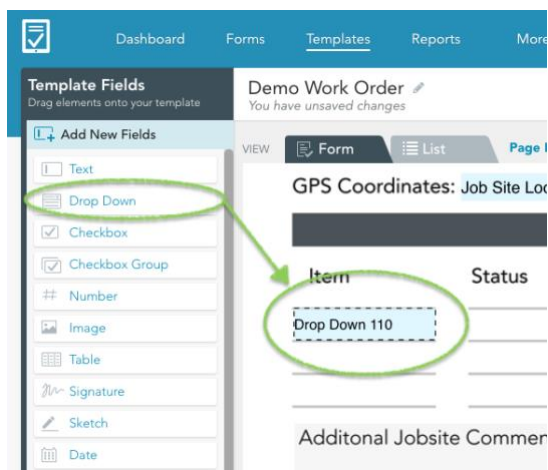


Fields section on the left side of the Template Editor into your form preview. Then resize and reposition your field to fit into the desired space on the form.

**Set field properties:** Click on a field in the form preview to see its properties in the Field Properties section on the right. Then click on the various properties to edit them. This is often done in conjunction with the previous step -- you will often want to set field properties as you add each field. Properties govern the field's look-and-feel, layout, and functionality.

## Adding Fields

After uploading your paper form into GoFormz, you have to tell GoFormz where on the form fields will be located and what kind of field you want to use. This is needed to determine where on the form users will need to click or tap in order to fill out each individual field, and what kind of input control will show up when they do.



To add a field to your GoFormz template, drag-and-drop fields from the Template Editor's left sidebar into the template preview area. The new field will appear in the preview in light blue. In the example to the left, the Drop Down field from the Add New Fields area is being dragged into the form under the "Item" label.

The sidebar contains three separate field lists, each with a different set of fields to choose from:

**Add New Fields:** This area lists all available field types. Drag a field into the preview area to create a new field of this type. See here for a detailed explanation of each field type.

**Template Fields:** This area lists all fields that already exist in your template. Dragging one of these into the edit area will create a duplicate field with the same name and Default Value as the original field.

Shared Fields: This area lists all fields that are shared across form templates. [See here](#) for more on shared fields. Drag one of these fields into the preview area to create an instance of that shared field in this template.

## Field Types

GoFormz supports many different field types for forms, ranging from standard text-driven fields like text boxes and drop-downs, to less traditional form fields like sketches and images.

Here are the options for field types in GoFormz:

### Auto Number

Description: A read-only field that automatically generates a unique ID number upon form creation. IDs are generated by incrementing the previous ID by 1.

Common Usage: Use for tracking or referencing your forms. This is a great choice for a form identifier. This field is typically used in auto-fill mode.

Notes: Enter a Seed Number to start the auto-numbering from a number other than 1

### Check Box

Description: A field that can be either marked or left blank. The mark may be a check, an X, a circle, or an oval; the field can take the form of a box to be checked, or an item to be circled. Click/tap the field to add or remove the mark.

Common Usage: Use for capturing binary input -- yes/no questions, on/off switches, indicating state (like "Job Completed"), etc. Also use if your form has items that are meant to be circled.

### Check Box Group

Description: A set of related fields using the Check Box interface described above. Check Box Groups can be single select (only one item in the group can be marked) or multi-select (any number of items in the group can be marked).

**Common Usage:** Use when requiring the user to select from a small number of options, typically 5 or fewer. For instance, you may use this as a status indicator -- e.g. Complete/In Progress/Incomplete. For more than 5 options, a dropdown should be used.

**Notes:** When you specify a list of check box names for your Check Box Group, the individual check boxes will not automatically appear in your preview. In order to add them to the preview, you will need to find your group in the Template Fields section in the left sidebar of the Template Editor, and drag each one into the preview area individually.

#### Database

**Description:** A menu showing a list of items from a GoFormz Data Source column. This is similar to the Drop Down, except the items in the menu come from a database rather than an ad hoc list. It can include all items in the column, or a filtered list of items.

**Common Usage:** You will often use this field in conjunction with several Text Box fields. For instance, you might have the user select a customer's name from a Database field, and then set up several read-only Text Boxes to auto-populate with relevant customer information from other Data Source columns (address, phone number, etc.), keying off the customer name that was entered.

**Notes:** When selecting a Data Source column, you are limited to columns that have been set as indexes, or keys, in the Data Source.

#### Date

**Description:** A placeholder for selecting a calendar date using a standard set of calendar controls.

**Common Usage:** Use to capture a date when exact time is not important, e.g. a customer's date of birth. Use in auto-fill mode to automatically capture the date when the form was created.

#### Date Time

**Description:** A placeholder for selecting a date and time using standard date/time controls.

Common Usage: Use to capture both date and time at once, e.g. when scheduling an appointment. Use in auto-fill mode to automatically capture the date and time when the form was created.



### Drop Down

Description: A menu showing a list of items, of which the user can select only one. Drop Downs can be set up to allow write-in entries.

Common Usage: Use when requiring the user to select a single item from a preset number of options, typically 4 or more -- e.g. a list of all field technicians in your company. For fewer options, a Check Box group should be used.

Notes: You can save your list of Drop Down choices and reuse it in another Drop Down elsewhere in the form.



### Image

Description: A placeholder for uploading an image into your form. This can be an image from your device's camera, or an image already stored on your device. JPEG, PNG, GIF, and BMP image formats are supported.

Common Usage: A picture is worth a thousand words! For instance, if you are a mechanic fixing a dent in a car, you may want to include "before" and "after" images of the car.



### Location

Description: A placeholder for adding your location to the form, as determined by the GPS on your device. The location can be shown as latitude/longitude coordinates, or as a pin on a map. The map can be a street or satellite map, and you can control zoom level

Common Usage: This can be very valuable for forms filled out in the field, because it lets the field worker record the exact location where a job was performed.

Note: You can include a timestamp along with the location, recording exactly when the location was taken.

## Number

Description: A write-in text field that only accepts numbers.

Common Usage: Use for any numerical values like counts and dollar amounts. Use as a read-only field for calculation results. For instance, you may have a series of Number fields with item costs, followed by a read-only Number field displaying the sum of those costs.

## Signature

Description: A placeholder for recording a signature. The signature can be recorded using a stylus, a finger, or a mouse -- depending on the device you are using to fill out the form.

Common Usage: Use to capture any signature -- e.g. customer signatures, supervisor signatures, inspector/reviewer signatures, etc. For approval workflows, you can set up the signature to be required, and to be automatically removed whenever any other form fields are changed. This way, changes cannot be made after the approver signs off on the form.

## Sketch

Description: A placeholder for the user to add a sketch using standard drawing tools (e.g. brush, fill, line, various shapes, etc.) and controls (e.g. brush size, color changer, layering, etc.).

Common Usage: Uses include:

Position Sketch field on top of an existing diagram in your form, allowing users to draw on top of the diagram (e.g. indicate where a dent is on a car drawing);

Instruct users to upload an image into the Sketch field and draw on top of it (e.g. take a photo of a dent on a car and circle it); or

Leave the Sketch field blank for users to draw on.

## Table

Description: A set of fields arranged into rows and columns. Each table cell is a separate field of one of the other types described here.

**Common Usage:** Use when you want to capture the same set of parameters about several related items. For instance, your form may have a table letting the user input tasks performed on a job along with who performed the task, task description, how long it took, and the hourly rate. A table makes sense here because the job may have multiple tasks, and we want to capture the same set of inputs for each task.

#### Text Box

**Description:** The most basic field, allowing users to input text. It can range from a single-line text box with room for just a few characters to a large multi-line area.

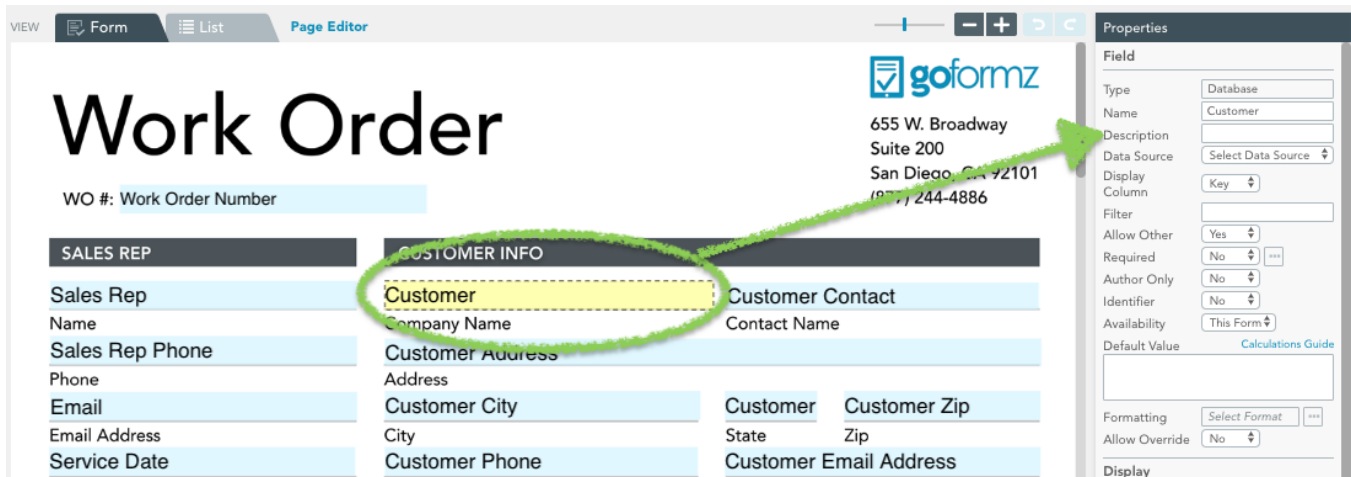
**Common Usage:** Use for any write-in text, such as a customer's street address. Use as a read-only field for displaying a database value based on a key from a Database field. (See Database field description for more details.)

#### Time

**Description:** A placeholder for selecting a clock time using standard controls.

**Common Usage:** Use to capture a time of day when the exact date is not important, e.g. the best time of day to reach a person on the phone.

## Field Properties



The screenshot shows the GoFormz 'Work Order' form editor. The form is divided into two main sections: 'SALES REP' and 'CUSTOMER INFO'. The 'CUSTOMER INFO' section is highlighted with a green dashed box and a green arrow pointing to the 'Properties' panel on the right. The 'Properties' panel shows various settings for the selected field, including Type, Name, Description, Data Source, Display, Column, Filter, Allow Other, Required, Author Only, Identifier, Availability, Default Value, Formatting, Allow Override, and Display.

SALES REP		CUSTOMER INFO	
Sales Rep	Customer	Customer Contact	
Name	Company Name	Contact Name	
Sales Rep Phone	Customer Address		
Phone	Address		
Email	Customer City	Customer	Customer Zip
Email Address	City	State	Zip
Service Date	Customer Phone	Customer Email Address	

GoFormz provides a wide variety of field types that you can use to build a form. Each type of

field has many different properties, allowing you to fine-tune the field's look-and-feel, layout, and functionality. This document has three parts:

**Field Types:** Lists and describes all the available field types.

**Common Properties:** Describes properties shared across many different Field Types, separated by property type (e.g. size and position, look and feel, etc.).

**Field-Specific Properties:** Describes properties that are unique to just one or two field types.

### **Common Properties**

The properties below are common to most GoFormz fields.

#### **Reporting Metadata**

**Name** - The name by which the field will be referenced in reports. The name does not appear in the form itself when it is being filled out.

**Description** - A short text snippet that elaborates on the field name, describing what kind of information the user should enter in this field. The description appears as a tooltip when you hover on the field name in the Reporting interface.

**Identifier** - Choose "Yes" if you want this field to serve as a unique identifier for your form -- perhaps the customer name, or purchase order number. The contents of this field will appear in the Identifier column of the Forms list, making it easier for you to quickly find a specific form. Note that you can only have one Identifier per template. If several fields are set up as Identifiers, only one of them will appear in the Forms list.

## Size and Position

Field position is set using pixels from the upper left corner of the form, while field size is set via pixel width and height:

Left - The offset of the left edge of the field from the left edge of the form, in pixels.

Top - The offset of the top edge of the field from the top edge of the form, in pixels.

Width - The width of the field, in pixels.

Height - The height of the field, in pixels.

Together, these 4 properties determine exactly where on your form the field will be located, and how large it will be. We recommend sizing and positioning your field using the drag-and-drop features of the Template Editor, and then using these 4 properties to fine-tune the size and position if necessary.

## Look and Feel

Note that the background colors (see Background and Focus Color below) only appear while the form is being filled out -- they are no longer visible after the form is completed. All other look and feel properties persist after form completion.

Align - The alignment of content within the field. Text can be aligned with the Left or Right side of the field, or Centered within the field. Other items (e.g. Images or Sketches) can be Centered or aligned with the Top Left corner.

Font - The font of any text inside the field. Our standard set of web fonts include: Arial, Courier New, Georgia, Helvetica, Times, Trebuchet MS, and Verdana.

Size - The size of any text inside the field.

Color - The color of the text or symbol inside the field.

Background - The color of the background behind the field while the form is being filled out. When the form is completed, all background colors disappear.



**Focus Color** - The color of the background when the user selects this field. When the field is not selected, the background color is determined by the Background property. This property is available for Text Box, Number, and Table fields.

#### Input Management - Defaults, Formatting, and Permissions

**Allow Override** - This property is only useful if a formula (calculation or data source) is used to as the Default Value for this field. Choose "Yes" to allow a user to enter their own value for the field, overriding the formula. Otherwise, the field will always default to the calculated value.

**Author Only** - Choose "Yes" if you want this field to be editable only by the user who started the form. This is useful for enforcing user permissions for particular fields in a workflow. Your form may have to go through several people before it is complete; this lets you specify that certain fields can only be filled out by the person who initiated the form.

**Default Value** - The value that appears in this field by default when the form is first opened. For text-based fields, this value can be a formula that either repeats a value from another form field, gets a value from a database column, or performs a calculation based on one or more other fields. See [here](#) for documentation on calculation syntax.

**Formatting** - The format in which the user's input should be displayed. The user doesn't have to enter text in this format, but it will be converted to this format whenever possible. GoFormz provides several pre-built format types for you to choose from, or you can enter a custom formatting string. The available format types are:

Social Security Number: e.g. 123-45-6789

Phone Number: e.g. 555-5555

Percentage: e.g. 34%

Currency: e.g. \$123,456.50

The formatting string syntax is very similar to Excel. For instance:

"hh:mm:ss" stands for time in hours, minutes and seconds -- "10:05:32"

"###,###.00" stands for a number with thousands separators and two significant digits after the decimal point -- "1,234,567.89"

etc.

Lock First Value - Choose “Yes” if you want the first value set in this field to become permanent. When this property is set, the field value becomes uneditable as soon as it has been set once.

Required - Choose “Yes” if you want to make this field required for all users. A user will not be able to mark this form as Complete until this field is entered.

#### Additional Functionality

Availability - This property lets you share a field across multiple forms. If you have a field that you plan to use in many different forms -- e.g. Customer Name or Address -- this feature lets you build the field just once, and then reuse it in as many forms as you like. The available values are:

Shared: The field will appear in the Shared Form Fields section of the Template Editor, and can be included in other forms. The Reporting Tool can use Shared Fields to report on fields across multiple templates. Once a field is designated as Shared, it cannot be switched back.

This Form: The field can only be used in this form.

Tab Index - The index of this field when tab-navigating through the form. Tab navigation is done using the Next button on a mobile device, or the Tab key on a keyboard. For instance, if your form has 3 fields A, B, and C indexed 4, 2, and 7 respectively -- then the tabbing order will be B, A, C. This is handy for users who want to quickly fill out the form without having to select each field individually. This property is available for Text Box, Number, and Table fields. You should set the Focus Color in conjunction with Tab Index, because it makes it easier to see which field is currently selected.

## Field-Specific Properties.

Some GoFormz fields are specific to just one or several types of fields. These are documented below, for each field type.

### Auto Number

Seed Number - The number of the first form created from this template. This number will be incremented by 1 for each successive form that is created.

### Check Box

Display - The symbol that is used to fill in the box. Available options are Checkmark, Xmark, Circle, and Oval. A circle or oval may be handy if you want to circle an element on your form.

### Check Box Group

Group Name - The name by which this group will be referenced in reports.

Group Items - The names of the check boxes in this group. These names are added to the "Template Fields" section of the Toolbox on the left side of the Template Editor. After creating the check box group, you will need to add each individual check box from the group into your form.

Item Name - The name of this check box. This should be one of the names that was specified in the Group Items property.

Multi Select - Specifies whether or not you are allowed to select multiple check boxes from the group in the same form.

Display - The symbol that is used to fill in the box. Available options are Checkmark, Xmark, Circle, and Oval. A circle or oval may be handy if you want to circle an element on your form.

### Database

Data Source - The name of the Goformz Data Source from which you want to source data for this field.

Display Column - The name of the database column that contains the list of options for this field. You can only select columns that have been set as indexes, or keys, in the Data Source.

Filter - A filter string that determines the subset of Display Column values that should be available as choices. For instance, suppose you have a large customer database, but for this field you only want users to be able to select customers from California. You might set Display Column to Customer, and Filter to ="State"="CA"

### Date, Date Time, and Time

Default Value - Choose "Current Date/Time" to display the current date and/or time on load. Choose "None" if you don't want this field to display anything on form load.

Use Current - Choose "Yes" to populate this field with today's date. Choose "No" otherwise. Note that if this field is set to "Yes" and Default Value is "None" -- then the current date/time will not appear until the user clicks on the field. If Default Value is set to "Current", the current date/time will appear on load

### Drop Down

Select Items - The set of items that should appear in the dropdown. Clicking this property brings up a dialog where you can add/delete items. Each item has 4 settings:

Default: If you want this item to appear by default when the form loads, check this box. Please only select one default per Drop Down.

Value: The value corresponding to this item. This value will appear in reports, and will be passed to any formulas referencing this field.

Display Name: The name that will appear in the list.

Sort Number: The position in which this item will appear in the drop-down list (1=top, 2=second from top, etc.)

There are two additional buttons at the top and bottom of the dialog:

Save values as a reusable collection: Click this to save your dropdown items, allowing them to be reused elsewhere in this form, as well as in other forms that you create. This is handy if you have frequently used drop down lists.

Use values from an existing collection: Click this to bring up a dropdown of previously saved collections of items. Then select the collection that you wish to use.

Allow Other - Choose "Yes" to let the user write in an entry. Choose "No" to limit the set of responses to just the entries on the Select Items list.

### Image

Image Quality – Choose how photos are embedded into the PDF. Adjusting the quality could help make the completed form PDF be larger or smaller in size.

Date Stamp – Places a date and time stamp of when the photo was taken in black font at the bottom of the photo. If a photo is uploaded from an image library, it will show when the photo was originally taken.

### Location

Default Value - Choose "Auto" to show the user's location in this field by default, whenever it is available. Choose "None" if you don't want this field to display anything by default.

Display - Choose "Map" to display the location as a snapshot of a pin on a map. Choose "Text" to display it as latitude and longitude coordinates.

Date Stamp - Choose "Yes" to include the current date and time in the upper left corner of the map snapshot. Choose "No" otherwise. Note that this field only applies when the Display property is set to "Map".

### Number

Keyboard - The keyboard that appears when a user selects this field on a mobile device. Choose "Alpha" for a keyboard with letters, or "Numeric" for a keyboard with numbers. This property has no effect on a desktop device.

Mask on complete - Choose "Yes" to hide the text in this field after the user submits the form. This can be handy when dealing with sensitive information like Social Security numbers -- "123-45-6789" would appear as "\*\*\*\*\*" when masked. Choose "No" if you want the text to be available after the form is completed.

Focus Color - The color of the background when the user selects this field. When the field is not selected, the background color is determined by the Background property.

### Sketch

Same as Image field.

### Signature

Clear on form edit - Choose "Yes" if you want to clear the signature as soon as any other form fields are edited. This is useful for approval workflows -- you don't want an approval signature to persist after the form has been edited. Choose "No" otherwise.

### Table

Columns - Column specifications for this table. Clicking this property brings up a dialog where you can add/delete columns. Once a column is added, you must set a Field Type for the column, along with its other properties.

Field Types. All field types that are available independently are also available within a Table column, with the exception of Auto Number and Check Box Group. The field types within a table have most of the same properties as their independent counterparts, so they are not documented again here. However, there is a set of properties that are unique to table columns of all types; these are documented in the Table Column Properties subsection below.

Additionally, note that a few properties are set on a per row basis, rather than for all rows in the column at once. For instance, if your Table has 4 rows, you will see 4 instances of each of these properties in the column properties list. These properties are:

Default Value: Each row in a column can have a different Default Value.

Filter: This is for the Database field type. Each row can be filtered to access a different database subset.

Rows - The height (in pixels) of each row in the table can be set individually here. These values override the default height set in the Row Height property.

Row Count - The number of rows in this table.

Row Height - The height of your table rows, in pixels, unless overridden in the Rows property.

Padding - The number of pixels that should be left blank along the left and right edges of each table cell. Including some padding can make a table easier to read, because it makes sure the text inputs in different table cells don't run into each other.

### **Table Column Properties**

There is a set of properties that is common to all columns in a Table field, but do not appear in any independent fields outside of a Table. These properties are documented here.

Field Type - The type of field in this column. All field types that are available independently are also available within a Table column, with the exception of Auto Number and Check Box Group.

Column Name - The name by which this column will be referenced in reports. The full name of the field in reports will be "<Table Name>/<Column Name>".

Locked - Choose "Yes" to lock this column. A user cannot edit a locked column.

**Hidden** - Choose "Yes" to hide this column, so that it is not displayed in the table. This is a lot like hiding a column in Excel -- the column is hidden, but can still be referenced in a calculation.

**Transparent** - Choose "Yes" to make this column transparent. A transparent column takes up space in the table -- but does not display any data, and users cannot input data into it. This can be useful if your table has a column with some pre-filled information, for example. As with Hidden columns, a Transparent column's values can still be referenced in calculations.

**Left** - The offset of the left side of the column from the leftmost side of the table, in pixels. This is how column widths are determined -- a column's width is equal to its Left value subtracted from the next column's Left value.

### Text Box

**Multi Line** - Choose "Yes" if you want text to wrap when it reaches the end of a line, creating multiple lines of text. Choose "No" if you don't want text to wrap.


**Mask on complete** - Choose "Yes" to hide the text in this field after the user submits the form. This can be handy when dealing with sensitive information like Social Security numbers -- "123-45-6789" would appear as "\*\*\*\*\*" when masked. Choose "No" if you want the text to be available after the form is completed.

**Line Height** - The amount of vertical space, in pixels, reserved for each line. For multi-line text boxes, the difference between Line Height and Size will give you the amount of space between lines.

**Keyboard** - The keyboard that appears when a user selects this field on a mobile device. Choose "Alpha" for a keyboard with letters, or "Numeric" for a keyboard with numbers. This property has no effect on a desktop device.

## Repositioning a field

You can reposition a field in three ways:


**Drag-and-drop.** Hover over the field until you see the  mouse pointer, then drag-and-drop the field to its new location. As you drag your field, you will notice it snapping to align with other elements in your form, with vertical and horizontal guidelines demonstrating this alignment. This makes it easier to position your field exactly where you want it with respect to other form fields.

**Field Properties.** Click on the field in the preview area to select it, then find the Left and Top properties in the Field Properties section on the right side of the editor. These properties give the field's position as offsets from the top left corner of the page.

**Arrow Keys.** Click on the field in the preview area to select it, then use the arrow keys on your keyboard to move the field by small increments. Typically, you will want to start with the drag-and-drop method, then fine-tune the field's position using arrow keys or the Field Properties section if needed.

### Resizing a field


You can resize a form field in two ways:

**Drag-and-drop.** To resize a field, hover over its edge until one of the resize mouse pointers appears (  ), then click and drag to change the field's dimensions.

**Field Properties.** Click on the field in the preview area to select it, then find

the Width and Height properties in the Field Properties section on the right side of the editor. These properties give the field's height and width in pixels.



Display	
Align	Left
Font	Helvetica
Size	20
Color	 #000000
Background	 D8F5FF
Left	129
Top	163
Width	352
Height	33
Visible	Yes

You will typically want to size the field approximately using drag-and-drop, then fine-tune its size using Field Properties.



## Deleting a field

To delete a field from your template:

1. Click the field in the preview area of the Template Editor to select it.
2. On Windows, hit the Delete key on your keyboard; on Mac, hit Fn + Delete.
3. Click Yes in the confirmation dialog box.

Note that deleting a field will remove it from your template, but will not remove it from the Template Fields area of the editor.



## Calculations

GoFormz is a powerful tool that can be configured to meet your specific requirements for collecting data, whether from a mobile device in the field or a desktop computer in the office. One of our most popular features is Calculated Fields, which provides anything from simple addition or multiplication to complex conditional logic right in your form.

In their base form, calculations are entered as text strings in the Default Value for a field or cell in a table.

There are two basic calculation formats, depending upon whether or not your fields are in a table or they are independent fields. Essentially, the text string syntax is very similar to that of popular spreadsheet programs, but we have to do a few extra things since we support both table and independent field types.

## Independent Fields

If your calculations involve independent fields, the calculation syntax is pretty simple. Let's say you had a field, Field 3 that was equal to Field 1 times Field 2, where Field 1, Field 2 and Field 3 are the names you have set for the three fields in your form template. In the Default Value for Field 3 (in the Properties pane for Field 3 in the template editor) you would type the following:

`=[Field 1] * [Field 2]`

Addition would be: `=[Field 1] + [Field 2]`

Please note the use of square parentheses to bound the names of the fields.

## Calculations in Tables

If calculations involve fields in a table, the syntax is a little different because we need to define both the table and the cells in the table.

Where in Excel you might multiply B5 by B7, for example, we define the cells as `[column#][row#]`. We also need to define the table in the calculation string since you might want to multiply a cell in one table by a cell in another table. Tables are defined as `"[Table Name]!"` Please note the use of the `"!"` to denote that this is a table and NOT an independent field.

So, let's say Price was in column 1, Qty was in column 2 and Total was in column 3 of a 10-row table called Equipment. Here is a sample syntax for a calculation that multiplies the Price in row 1 by the Qty in row 1:

`=[Equipment]![1][1] * [Equipment]![2][1]`

You would place this string in Default Value 1 in the Total column, which represents the value in row 1 for Total. For row 2 you would place the following in Default Value 2 in the Total column:

Field	
Type	Table
Name	Labor & Services
Description	
Rows	4
Display	
Padding	5
Font	Helvetica
Size	16
Color	#000000
Background	D8F5FF
Focus Color	#C0FFFF
Left	50
Top	723
Tab Index	20
Columns	
Labor or Services	↑ ↓ ✕
Description	
Database	
Hours	↑ ↓ ✕
Rate	↑ ↓ ✕
Total	↑ ↓ ✕
ItemRef	↑ ↓ ✕
UnitPrice	↑ ↓ ✕
Amount	↑ ↓ ✕

=[Equipment]![1][2] \* [Equipment]![2][2]

And so on. Note that the row numbers have changed from "1" to "2".

Note, in tables you find the Default Value by clicking on the Columns property in the Properties window for the table you are working on, then click the "..." button.

You will see the Columns pop-up menu. Click on the column you want to have the result in and, when you scroll to the bottom of the properties for that column you will see Default Values for each of the rows in that column.

< Table Properties	
Column	
Type	Text
Name	Rate
Description	
Multi Line	No
Keyboard	Numeric
Author Only	No
Formatting	Currency
Allow Override	No
Mask on Complete	No
Locked	No
Display	
Padding	10
Align	Right
Hidden	No
Transparent	No
Width	174
Default Value 1	
Default Value 2	
Default Value 3	
Default Value 4	

Just paste the calculation string in each Default Value, but make sure the column# and row# are changed so that each row is using the right cells for the calculation.

## Summations

Summing a column, like a Total column is a little different, but not much. Let's assume you have a single, independent field that calculates a grand total by summing all the values in the 10 rows of the Total column. You would set the Default Value for that grand total field as follows:

=SUM([Equipment]![3][1]:[3][10])

This calculation illustrates that you are summing the values in column 3 of the Equipment table from rows 1 to 10.

As mentioned before, calculations are extremely powerful and can be used in a variety of ways within your GoFormz account.

## Advanced Calculations

GoFormz Calculations			
Functions	Syntax	Example Calculation	Use Case
Sum Function	Description: The SUM Function is the most frequently used function within GoFormz. Allowing you to add together fields within your template using simple addition/subtraction, the SUM Function can be used in many versatile ways by just referencing fields together in the same SUM Function:  =SUM([Field Name 1]+[Field Name 2]) =SUM([Field Name 1]-[Field Name 2]) =[Field Name 1]*[Field Name 2]	--	--
	=SUM([Column Number]+[Column Number][Row Number])	=SUM([Subtotal]+[Delivery Fee])	When you are wanting to add multiple fields together.
	=SUM([Table Field Name][Column Number][Row Number]+[Field Name 1])	=SUM([Subtotal]-[Delivery Fee])	When you are wanting to subtract multiple fields together.
	=SUM([Table Field Name][Column Number][Row Number]+[Table Field Name][Column Number][Row Number])	=Quantity*[Unit Price]	Multiplication and Division do not need a SUM Function unless you are adding or subtracting another field from the multiplied/divided fields.
	=SUM([Column Number][Row Number][Column Number][Row Number])	=SUM([1][1]+[2][1])	When wanting to add two cells within a Table Field together.
	=SUM([Table Field Name][Column Number][Row Number]+[Field Name 1])	=SUM([Table Name][3][1]+[Material Cost])	When working outside a Table field but referencing a cell within a Table Field.
	=SUM([Table Field Name][Column Number][Row Number]+[Table Field Name][Column Number][Row Number])	=SUM([Table Name][3][1]+[Table Name][6][2])	When working outside a Table Field and referencing two cells within a Table Field.
IF Function	=SUM([Column Number][Row Number][Column Number][Row Number])	=SUM([3][1]:[3][10])	When wanting to sum a range of cells within a Table Field while inside the Table Field.
	=SUM([Table Field Name][Column Number][Row Number]:[Column Number][Row Number])	=SUM([Table Name][1][1]:[1][10])	When wanting to sum a range of cells of the same column within a Table Field while outside the Table Field.
	=SUM([Column Number][Row Number]:[Column Number][Row Number])	=SUM([1][1]:[10][1])	When wanting to sum a range of cells in the same row within a Table while working inside that Table Field.
	Description: The IF Function is another one of the most frequently used calculations used within GoFormz. IF Statements allow you to conditionalize your template's field values and make other fields behave accordingly based on how your IF Statement is built. When using IF Statements, understand that its layout is broken out into three sections all separated by two commas: IF(this, then do this, else do that). Additionally, IF Statements support the use of other functions within the IF Statement itself allowing you further capability in customizing your next template.	--	--
	=IF(SUM([Field Name 1]+[Field Name 2]) > 0, SUM([Field Name 1]+[Field Name 2]), [Field Name 3])	=IF(SUM([Subtotal]+[Delivery Fee]) > 0, SUM([Subtotal]+[Delivery Fee]), [Other Subtotal])	This statement is saying that IF the sum of the fields [Subtotal] and [Delivery Fee] is greater than zero, <b>THAN</b> go ahead and add these two fields together, <b>ELSE</b> populate the field with the data within the other field, [Other Subtotal].
	=IF(SUM([Column Number][Row Number]+[Column Number][Row Number]) = "100", "Pass", "")	=IF(SUM([2][1]+[3][1]) = "100", "Pass", "")	This statement is saying that IF the sum within a Table Field's column 2/row 1 and column 1/row 1 equal an exact value of 100, <b>THAN</b> display within the field the word Pass, <b>ELSE</b> leave the field blank. *Note the use of quotes here make the value definitive so if the calculation's value does not meet the IF Statement parameters, the value of Pass will not display.
	=IF([Field Name 1] < 100, SUM([Field Name 2]+[Field Name 3]), [Field Name 1])	=IF([Subtotal] < 100, SUM([Additional Fee 1]+[Additional Fee 2]), [Subtotal])	This statement is saying that IF the value in [Subtotal] is less than a 100, <b>THAN</b> sum together two other fields titled [Additional Fee 1] and [Additional Fee 2], <b>ELSE</b> populate the value of [Subtotal].

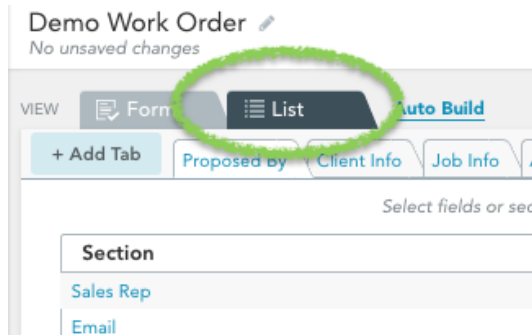
This is a great example of a common calculation used within GoFormz to omit a total fields default zero value that displays when using only using a SUM Function. Utilizing an IF Statement that says IF the sum of [Subtotal] and [Tax] is greater than zero, **THAN** sum these two fields up, **ELSE** leave the field "blank".

Database Function	Description: Utilizing a Database field allows you to pull form uploaded data within your GoFormz account. You can then use the Database Function to autopopulate other fields on your form based on those selections.	--	--	This calculation is stating that based on the referenced Datasource "Customer List" and the selection made in the Database field [Customer], to autopopulate the appropriate row's value in the column Address inside that Datasource.	--
	=database("Datasource Name", [Database Field Name], "Column Being Referenced")		=database("Customer List", [Customer], "Address")	This is an example of the same calculation but when working within a Table Field. Instead of referencing the Database field name, you are referencing the column/row that the Database field is located within.	
	=database("Datasource Name", [Column Number][Row Number], "Column Being Referenced")		=database("Customer List", [2][1], "Address")	Filtering allows you to narrow down a list of applicable selections in another Database Field based on the selection made within the first Database field. For example, you select a Vehicle Make in one Database field and in the second Database field, the selections available are only those made by that Vehicle Make instead of making a selection for all choices.	
Database Filtering	= "Display Column Filtering From"=[Database Field for that Datasource Display Column]		= "Vehicle Make"=[Car Make]		
Upper Function	=UPPER([Field Name])		=UPPER([State])	The UPPER Function allows you take the value within that field and turn the entire value into ALL CAPS. It's a get use case for fields that require the value to be in all capitals like the State section of an address.	
Length Function	Description: The best usage of the Length Function is to allow yourself the ability to designate that if the number of characters of a specific field or range of fields exceeds a specified value, then perform another action.		=IF(Len([Field Name 1] >0, SUM([Field Name 2]+[Field Name 3]), ""))	This example is stating that IF the length of [Field Name 1] is greater than zero characters in length, THEN sum together [Field Name 2] and [Field Name 3], ELSE leave the field blank.	
Placer Text Functions	Description: Using Placer Text allows you to autopopulate fields with information relative to the current user of the form such as their name, their User ID Email, or even a phone number within their account.	--			--
	=CURRENTUSER_FIRSTNAME		John	Displays the current user's first name.	
	=CURRENTUSER_LASTNAME		Doe	Displays the current user's last name.	
	=CURRENTUSER_USERNAME		john.doe@example.com	Displays the current user's User ID Email.	
DateValue Function	=CURRENTUSER_PHONENUMBER		123-456-7890	Displays the current user's phone number.	
	Concatenating fields using & ""&		=CURRENTUSER_FIRSTNAME&""&CURRENTUSER_LASTNAME	This will display both values within the same field separated by whatever is within the quotes. In this example we used a space between the quotes to space the values of John and Doe to display both as John Doe instead of as JohnDoe.	
	Description: DateValue allows you to get the value between Time fields. Without using DateValue, you cannot convert a value within a Time field to display as a numerical value as the value of 1 is referred to as 24 hours within a Time field. Should you enter a time of 3:00 without DateValue, that value would convert into a Number field as 3 days worth of hours giving you a value of 72.		--		--
	=DateValue([Field Name 2]) - DateValue([Field Name 1])		=DateValue([Ending Time Field Name]) - DateValue([Starting Time Field Name])	Use this calculation to get the total time of a Starting and Ending Time field. You will also need to format the total time field to display in hours and minutes by entering: [h]:mm	
DateValue Function	=DateValue([Column Number][Row Number]) - DateValue([Column Number][Row Number])		=DateValue([3][1]) - DateValue([2][1])	Use this calculation to get the total time of a Starting and Ending Time field when both Time fields are within a Table field. You will also need to format the total field column to display in hours and minutes by entering: [h]:mm	
	=IF([DateValue([Field Name 2]) - DateValue([Field Name 1]) >0, (DateValue([Field Name 2]) - DateValue([Field Name 1])), "")		=IF([DateValue([Ending Time Field Name]) - DateValue([Starting Time Field Name]) >0, (DateValue([Ending Time Field Name]) - DateValue([Starting Time Field Name])), "")	Using an IF Statement within the DateValue calculation to eliminate the default 0:00 value that displays in the Total Time field. This calculation is stating that IF the DateValue of [Ending Time Field Name] minus the DateValue of [Starting Time Field Name] is greater than zero, THEN go ahead and perform that calculation, ELSE leave the field blank.	

Check Box Calculations	Description: Check Box calculations allow you to add a level of conditional logic to your forms that can check that if a specific Check Box is "checked" that another field or fields perform a certain action. You can also set Check Boxes to look at other Check Box fields so that if one Check Box is "checked", then another can't be "checked".	=IF([Check Box Field Name]="true", SUM([Field Name 1]+[Field Name 2]), false)	*Note - When referencing a Check Box as being "checked" or "unchecked" within a calculation, use the references of "true" and "false". If you reference "true" or "false" within quotes, you set the outcome as being definitive whereas if you simply state either true or false in the calculation the outcome is not definitive and can be changed or "checked/unchecked".	--	This example is checking that IF the Check Box field [Fees Applicable] is "true" meaning that it is "checked"; <b>THAN</b> sum up the fields [Delivery Fee] and [Stocking Fee]. <b>ELSE</b> leave the check box field false meaning unchecked by default.
	=IF([Check Box Field Name 1]="true", "false", false)	=IF([Fees Applicable]="true", SUM([Delivery Fee]+[Stocking Fee]), false)			You use calculation when wanting to have two Check Box fields be dependant of one another so that you can only check one of the other. This calculation is stating that IF the Check Box field [Check Box Field Yes] is "true" meaning it's "checked", <b>THAN</b> the current Check Box field must be "false" meaning it's "unchecked", <b>ELSE</b> leave the current Check Box Field false or unchecked by default.
	=([Column Number][Row Number]="true", "false", false)	=IF([2][1]="true", "false", false)			This is the same calculation example but just within a Table field. Instead of referencing the other Check Box Field's name, you need to reference the column and row the other Check Box Field is within instead.
	=IF(OR([Check Box Field 1]="true", [Check Box Field 2]="true", "false", [Current Check Box Field Name])	=IF(OR([Good Rating]="true", [Poor Rating]="true", "false", [Excellent Rating])			This is a calculation example of three Check Box fields, [Excellent Rating], [Good Rating], and [Poor Rating] and it's saying that IF [Good Rating] or [Poor Rating] are "true" or checked <b>THAN</b> the current Check Box Field will be "false" or unchecked, <b>ELSE</b> the field will be whatever you need it to be by referencing it's field name being [Excellent Rating].
Symbols	[Brackets] - Brackets are what is used to reference a field within a GoFormz template	[Field Name]			*Note that when referencing a field, the field is case sensitive and must be referenced exactly as it is titled within the field.
	(Parentheses) - Parentheses are used to reference a function's calculation	=SUM([Field Name 1]+[Field Name 2])			Whatever is within the parentheses dictates what is being performed in the calculation
	"Quotes" - Quotes are used to definitively define an instance, value, or outcome within GoFormz.	=IF(SUM([Field Name 1]+[Field Name 2])>50, "Pass", "Fail")			In this example, we are stating that IF the sum of [Field Name 1] and [Field Name 2] are greater than a value of 50, <b>THAN</b> display the text: Pass, <b>ELSE</b> display nothing as there is no character between the last string of quotes.
Formatting Strings	Pound Symbol # - Pound refers in general to a numeric value. If you format a Number field to display it's value as #.00, then if you simply enter in a value of 1, the field will format the value to display as 1.00 instead of just one. The use of # allows you to format strings within fields to display values in a specific format like a social security number as ###-##-####		--		--
	=text([value]*.01,"#.00%")		mm/dd/yyyy		Use this string to have a numeric value display as a percentage. Set the value to display as month/day/year.
			dd/mm/yyyy		Set the value to display as day/month/year.
			mmmm		Displays the month's full name - i.e. January, February, March...
	Formatting a Text Box to display a Date Field's value is a specific layout:		dddd		Displays the day's full name - i.e. Monday, Tuesday, Wednesday...
			mmmm dddd, yyyy		Displays the date's full name - i.e. October 8, 2015.
			[h]:mm		This allows you to display your DateValue Time values in hours and minutes.

## List View

Configure the List View. The previous steps configured your template's Form View. Here, we configure how your form will appear in the mobile app editor's List View. The List View organizes your form fields into logically grouped sections and tabs for enhanced navigation on smaller screens



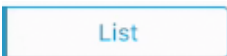
via intuitive drag-and-drop actions.

To configure the List View, switch to the List tab in the preview area. Here, you can create tabs and sections and populate them with your form fields in the desired order

In the mobile app's Form Editor, you can view the form in one of two different modes: Form View or List View.



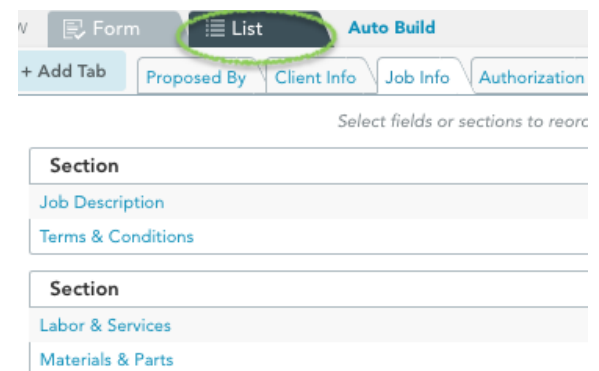
Form View is what you might expect - it looks just like your form.



List View is an organized list of those exact same fields but presented using sections and tabs for enhanced navigation on smaller screens.

We recommend setting up your List View after you are all done with the Form View -- i.e. after you have added and positioned all your form fields and set field properties.

To configure the List View, open your template in the Template Editor, then click the List tab at the top of the preview area. This opens the List View Preview.



By default, the List View Preview contains a tab for each page in your form. Each tab contains a single section listing all the fields on that page.

In the remainder of this training, we go over the basic building blocks of the List View -- tabs, sections, and fields -- and the tools that are available to you for configuring each one. These tools are intuitive and rely heavily on drag-and-drop functionality.

## List View Tabs

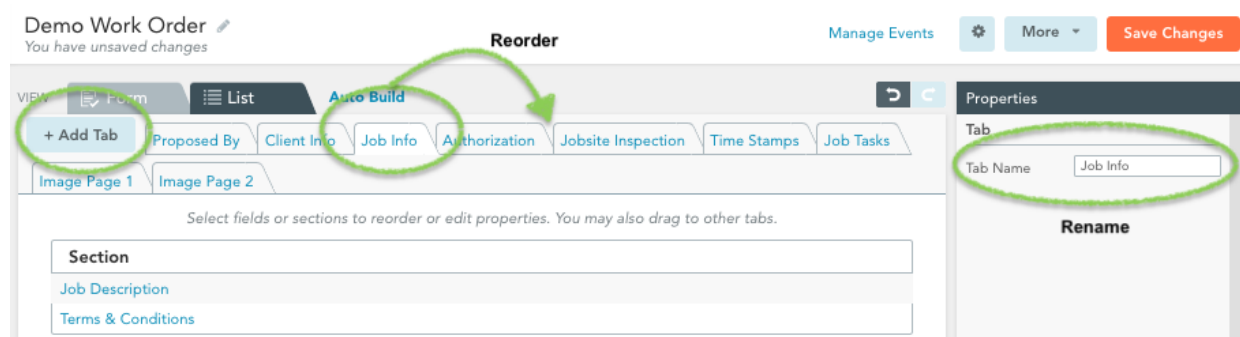
Tabs are the top-level grouping in the List View.

To add a tab, click the Add Tab button to the left of the tabset. The new tab will appear at the right end of the tabset, with a generic name.

To rename a tab, click the value column next to the Tab Title property in the Field Properties section, and type in the new tab name.

To reorder tabs, drag a tab to the left or right within the tabset, and drop it in its new location.

To delete a tab, remove all sections from the tab, then click the delete tab link that shows up. Note that you cannot delete the default tabs -- you can only rename them.



## Managing Sections

Sections are the mid-level grouping of the List View. They reside within tabs, and they contain fields.

To create a new section, drag the Create Section item from the Left Sidebar into the Preview area. You can drag the element to a position within an existing section to split that section in two.

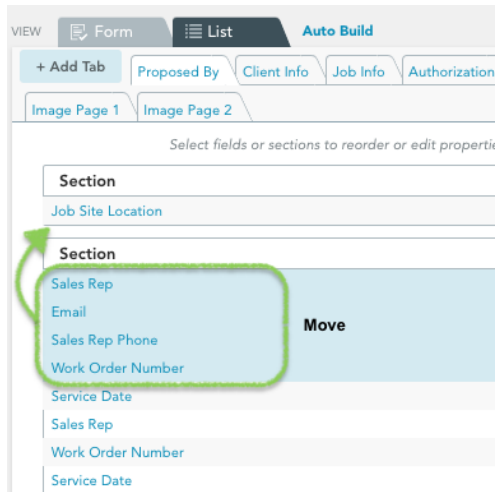
To rename a section, click the value column next to the Section Title property in the Field Properties section, and type in the new section name.

To reorder sections, drag and drop a section up or down within the tab.



To move a section to another tab, click and drag the section onto the tab name.

To delete a section, click on it to select, then hit Delete (Windows) or Fn + Delete (Mac) on your keyboard. Note that you cannot delete the top section in a tab.



Save your template. Click the Save Changes button in the upper right corner of the Template Editor to save the template. Once the template has been saved, you can access it in the Templates Tab.

Please Note: There is no auto-save feature in the GoFormz Template Editor. You must save your changes in order to update your template.

## TEMPLATE FAQ'S

### What type and size of file can I upload as a Template?

GoFormz templates can be uploaded as either a PDF or JPEG, and can be no larger than 5 MB.

### How do I access my Templates from a mobile device?

Login to the GoFormz mobile app from your device and either select the “+ New” tab at the bottom of the screen, or choose from the Recents tab at the bottom of the screen. Recent templates will appear at the top.

### I've created a new Template in my account, how do I make sure it's available from my mobile device?

As long as your device has a solid data connection and the app is either open or running in the background, templates will automatically synchronize between your web account and your mobile devices. However, with any new templates added, the background will need be downloaded to the device before Form View can be used. This download is done by simply tapping on the template. Once downloaded, the background will remain on the device and be available both on and offline until the user logs out of their GoFormz account. Once logged out, all backgrounds will need to be re-downloaded to be available.

## **Is there a limit to the number of templates I can have in my account?**

For your subscription type, there is no limit.

## **Can I grant or deny access to a template for specific users in my account?**

Yes, GoFormz provides the ability to control access to specific resources in your account. For more information please read Users, Groups, and Permissions found under the Account Management topic.

## **Here are some highlights of what you can do with form templates:**

Create templates to mimic your paper forms

Populate your templates with fields that best fit the information you want to capture

Configure your electronic form's layout in both the Form View and the List View.

Set up template folders to control user access to different templates

Automate workflows for forms created from your templates.

## **What is the difference between 'This Form Fields' and 'Shared Form Fields'?**

With each field added to your template you will have the option to set the Availability to either "This Form" or "Shared" using the Field Properties dialog box. By default all fields are set to "This Form". Fields with this property are only available on the template for which they were created. Fields designated as Shared can be added to other templates within your account. Shared fields do not populate data from one form to another automatically. Shared fields allow data gathered from multiple form templates to be aggregated in a single report. This feature greatly enhances reporting by allowing you to gather data from multiple templates at the same time.

## **What's the difference between Form View and Field View?**

GoFormz provides two options when viewing forms on a mobile device: Form View and Field View. Form View is what you might expect - it looks just like your form but also includes any specific fields you have added to enable capturing data. Field View is an organized list of those exact same fields but presented using sections and tabs for enhanced navigation. While both views work on either smartphones or tablets and you can switch between them at any time, Form View is typically preferred on a tablet where there is more room to view an entire form and Field View is used on a smartphone where screens sizes tend to be smaller and a list may be easier to navigate. And remember that any data captured, no matter in which view, will always show in the appropriate location on your form.

## **What are Replicated Fields and how do I use them?**

Replicated Fields are used when you need the same information to appear in more than one place on your form, but are only required to enter it once.



For example, if you have a 5 page template with a place for customer name and address to be entered at the top of each page, using replicated fields would allow that information to be entered once on the first page and populated on each of the remaining 4 pages simultaneously.

To add a replicated field, from the template find the field in the 'This Form Fields' section and drag it on to your template in the new location. The same field can be replicated as many times as needed within a template.

### **How do I use 'Manage Events'?**

Managed Events are used to create automation and workflow within your account when certain actions take place. Based on criteria like a form being completed or transferred, you can create an event so an automated email is sent to a specific address, like a customer for example. Within that email you can also include relevant data from the completed form such as the customer's first name, a detail of services performed, or the amount charged. Managed Events are extremely flexible and are configured for each template to match your specific process and workflow.

### **What is Public Share?**

Public Share gives non-GoFormz users the ability to fill out a form from a standard web page without the need to authenticate, and provides the GoFormz account owner access to both the document and the data.

### **If I make changes to an existing Template, will that affect forms previously created from that Template?**

Yes. To explain the process, GoFormz does not actually store PDF's of completed forms in an account. What we store is the metadata (the specific data you capture on your form) and a single copy of the original PDF or JPEG that was uploaded. When you view a form, we match the appropriate metadata with the correct Form Template and present it as a form which can be printed, emailed, etc. Once you close that form, resources are put back where they belong without storing an actual PDF. Because of this process, any changes or updates made to a template will be visible on all forms completed from that template.

### **What are 'Print Configs'?**

Print Configs provide the ability to select either specific pages, or a range of pages when a form is printed or emailed from GoFormz.

## Data Sources

A Data Source in GoFormz is like a simplified database table. The rows of a data source are called records, and the columns are called fields. Data Sources can be referenced by form fields to provide a powerful way to simplify data capture and increase accuracy.

### Use Cases

There are two primary use cases for data sources in GoFormz:

1. Auto-populating fields. GoFormz can use a data source to auto-populate fields in a form. For example, your form might have fields for customer name, address, and phone number. You may want the address and phone number to fill automatically when a user selects the customer name. You can do this with a data source.
2. Option filtering. GoFormz can use a data source to present options to a user based on the value of another field. For example, your form might have fields for the make and model of a car. Then you will likely want the model options presented to the user to depend on the make that they selected -- so if they select Ford, they only see Ford models; if they select Toyota, they only see Toyota models; etc. You can set up this kind of logic using a data source.

### Structure & Concepts

Data source structure is simple. Each data source is a table, where the rows are called records, and the columns are called fields. The records typically represent some object or entity (e.g. a customer), and the fields provide information about that entity (e.g. customer name, address, phone number).

There are two important concepts to understand when dealing with data sources -- key fields and indexing.

### Key Fields

Each data source must have a key field, and the key field must be unique -- i.e. no two records can have the same key field. This requirement is necessary for the first use case described above -- auto-populating fields.

Let's go back to our first example -- a data source containing fields for customer name, phone number, and address. In this example, customer name is our key field, because that's the field that we want to use to auto-populate the phone number and address. But in order to do this, there can only be a single record for each customer name. If the same customer name is found in multiple records, then GoFormz would have no way of knowing which record's address and phone number should be used!

## Indexing

Indexing a data source on a particular column/field lets you use that column for data retrieval. In practical terms, it enables the second use case described above -- option filtering.

Let's go back to our second example -- a data source containing fields for car makes and models. The goal is to use these fields in a form in the following way:

- A "Car Make" form field that displays all unique makes from the data source as options for the user.
- A "Car Model" form field that displays the appropriate models from the data source based on the make selected by the user.

Indexing the data source on both the make and model columns enables this feature.

## Database Fields and Barcode Scanning Overview

GoFormz supports two main use cases for database fields:

1. Auto-populating fields. Use a data source to auto-populate fields in a form.
2. Option filtering. Use a data source to present a limited set of options to a user based on the value of another field.

We will go over each use case separately below.

Before you can configure a database field in your form template, you must set up your data source.

## Creating Data Sources

To create a new data source, you must first prepare a CSV file containing your data. We decided on the CSV format because it is simple, and most applications can export data in this format. The one requirement for the CSV is that the *key field must be the first column* in the CSV.

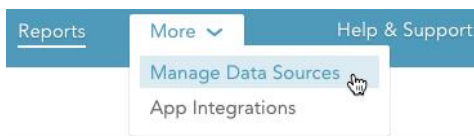
Suppose you want to create a data source called “Customers”, which contains the names, address, city, state, zip code, and phone number for all your customers. A typical workflow for generating a CSV might go something like this:

- Export the desired information from wherever it resides. In this example, you will likely have the customer information in one of your existing business systems, like Quickbooks.
- Open the exported file in a spreadsheet program like Excel, and make your key field the first column. In this example, that would be the customer name.
- Save your data as a CSV file.

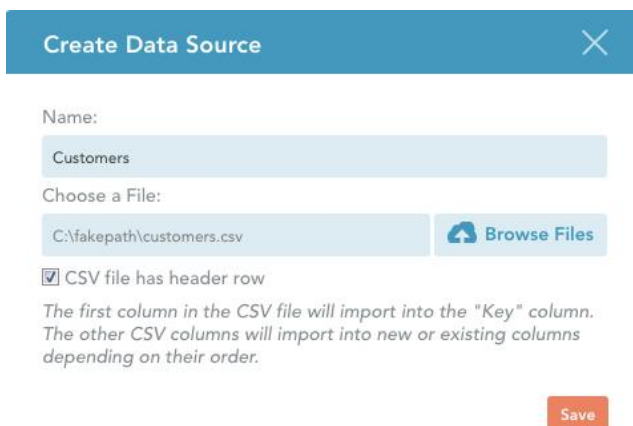
It is a good practice to include headers in your CSV file. Most applications will have the option to save your CSV with headers.

Once you have your CSV file ready, do the following to import it into GoFormz and create a data source:

1. Expand the **More** dropdown in the header, and select **Manage Data Sources**.



2. Click the **Create** button. The **Create Data Source** dialog appears.

A screenshot of the 'Create Data Source' dialog box in GoFormz. The dialog has a blue header bar with the title 'Create Data Source' and a close button (X). Below the header, there is a 'Name:' label followed by a text input field containing the word 'Customers'. Underneath is a 'Choose a File:' label followed by a text input field showing the file path 'C:\fakepath\customers.csv' and a 'Browse Files' button with a cloud icon. A checkbox labeled 'CSV file has header row' is checked. Below the checkbox, there is explanatory text: 'The first column in the CSV file will import into the "Key" column. The other CSV columns will import into new or existing columns depending on their order.' At the bottom right of the dialog is a red 'Save' button.

3. In the **Name** field, enter the name for your new data source.

4. Click **Browse Files** to launch the file chooser, and select your CSV file.
5. If your CSV file has a header row, check the **CSV file has header row** box.
6. Click **Save**.

The data from the CSV file will be uploaded into GoFormz, and you will see a table with your new data source data.

Once you have a data source set up, open your template in the Template Editor, and follow the appropriate use case below.

#### Use Case 1: Auto-Populating Fields

The first use case is auto-populating fields in a form. For example, your form might have fields for customer name, address, and phone number. You may want the address and phone number to fill automatically when a user selects the customer name. To do this, you need a data source that has the customer name as its key column, and has address / phone number columns for each customer.

To set this up in your form template, you must first create your key field (the Customer Name field in our example), then add auto-populated fields that reference the value selected in the key field. In our example, we will want to auto-populate fields like Address, City, State, Zip Code, and Phone Number based on the Customer Name selected by the form user.

To create the key field in your template: (Note: If using a Barcode field instead of a Database field, please make sure that all values are added to the key column of your datasource. The steps below apply to Barcode fields and Database fields)

1. Add the Database field to your template by dragging and dropping it from the Template Fields sidebar on the left side of the Template Editor, as you would with any other field type.
2. In the Field Properties area:
  - Select your data source in the Data Source property. In this example, we've selected "AXIS Customer List".
  - Select the data source column that you want to display in this field using the Display Column property. In this example, we've selected the "Key" column, which is the

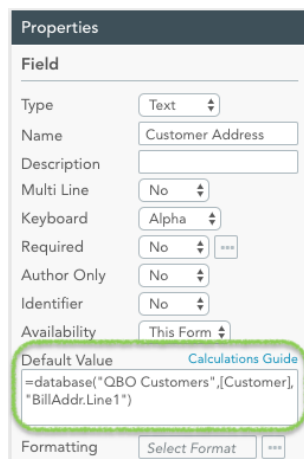
customer name.

3. Set up other field properties as you would for any other field.  
This is all you need to do for the key field.



To create an auto-populated field based on your key field, do the following:

1. Drag and drop a Text field into your template, as you would with any other field.
2. In the Default Value property, specify the value that GoFormz should place in this field, using the following syntax: `=database("Datasourcename", [KeyField], "Column Header")`, where:
  - o Datasourcename is the name of your data source. In our example, this is "AXIS Customer List"



- o KeyField is the name of the key field in your template that should be used for the database lookup. In our example, this is "Customer Name"
- o Column Header is the name of the column in your data source that represents the desired entry for this field. In the example below, this is "Address".

In our example, the Default Value should be `=database("AXIS Customer List", [Customer Name], "Address")`. Note that you MUST use double quotation marks in the syntax -- single quotes will not work.

3. Set up other field properties as you would for any other field.

Now, when a user fills out a form based on this template, they will be able to select a Customer Name from a drop-down menu -- and GoFormz will automatically populate your Address field with the Address from your data source that corresponds to the selected customer. You can continue by adding auto-populated form fields for other data source columns, like City, State, Zip, and Phone -- as shown below.

<b>Company Name:</b>	Beverly Healthcare		
<b>Phone:</b>	760-747-0430		
<b>Address:</b>	421 East Mission Avenue		
<b>City:</b>	Escondido	<b>State:</b> CA	<b>ZIP:</b> 92025-1909

## Use Case 2: Option Filtering

The second use case is filtering the list of options presented to the user based on the value of another form field. For example, your form might have fields for the manufacturer and number of an electronic part used in fulfilling a work order. Once a user selects the manufacturer, you will want to present them with a list of parts for that manufacturer only -- so if they select Cisco, they should only see Cisco parts; if they select Juniper, they should only see Juniper parts, etc. This is what we call option filtering.

For this example we would need a data source of parts that has columns for the part's manufacturer and number; the part number can be the key column as it is in the examples below, but it does not have to be. We would want to make sure that the data source is indexed on the manufacturer column, since GoFormz cannot display non-indexed columns in a database drop-down.

Setting up the initial field is much like setting up the key field in the first use case:

1. Add the Database field to your template by dragging and dropping it from the Template Fields sidebar on the left side of the Template Editor, as you would with any other field type.
2. In the Field Properties area:
  - Select your data source in the Data Source property. In this example, we've selected "Example Data Source".
  - Select the data source column that you want to display in this field using the Display Column property. In this example, we've chosen the "Mfg." column, representing the part manufacturer.
3. Set up other field properties as you would for any other field.  
This is all you need to do for the first field.

The screenshot shows the 'Field Properties' panel for a 'Database' field. The 'Display Column' property is highlighted with a green box and set to 'Mfg.'. Other properties visible include 'Type' (Database), 'Name' (Mfg.), 'Description' (empty), 'Data Source' (Example Data Source), and 'Filter' (empty).

Column	
Type	Database
Name	Mfg.
Description	
Data Source	Example Data Source
Display Column	Mfg.
Filter	

Next, set up the filtered field:

1. Add another Database field to your template via drag-and-drop.
2. As before, select the Data Source and Display Column in the Field Properties area. In this example:
  - Data Source = "Parts"
  - Display Column = "Key", which is the part number column in this data source.

3. In the Filter property, enter the filter for this field. In this example, we use . This indicates that

The screenshot shows the 'Field Properties' panel for a 'Database' field. The 'Name' is 'Part'. The 'Data Source' is set to 'Example Data Source'. The 'Display Column' is 'Key'. The 'Filter' is set to '=[Mfg.]=[Parts][11]'. The 'Allow Other' option is 'Yes' and 'Author Only' is 'No'. A green dashed box highlights the 'Data Source', 'Display Column', and 'Filter' fields.

we want to only display the part numbers associated with data source rows where the "Mfg." column has the value that the user entered in the "Manufacturer" form field. So if the user selects Juniper as the manufacturer, only Juniper part numbers will be displayed. This is the simplest form of filtering. See below for more on the filters supported by GoFormz, and the associated syntax.

The Filter property supports equality and inequality operators (= and <>), as well as the logical operators And, Or, and Like. The logical operators can be nested using parentheses. We give some examples of how you might use these below.

For the purpose of these examples, let's suppose our Parts data source has the following 4 columns, and our form has the following 4 corresponding fields:

Data Source Column	Form Field	Description
Key	Part Number	The unique number associated with this part.
Mfg	Manufacturer	The part's manufacturer (e.g. Juniper, Cisco, etc.)
Device	Device Type	The type of device this is (e.g. router, server, etc.)
Color	Color	The part's color (e.g. black, white, etc.)

Given this setup, the examples below represent some possible filters for the Part Number field in your form template. These examples should be sufficient for you to construct your own filters.

And operator	=And("Mfg"=[Manufacturer], "Device"=[Device Type])	Return all part numbers for a given manufacturer and device type -- e.g. all Cisco routers.
Or operator	=Or("Mfg"=[Manufacturer], "Device"=[Device Type])	Return all part numbers that match either the manufacturer or the device type -- e.g. all Cisco parts as well as all routers.
Like operator	=Like("Mfg", [Search Field])	Return all part numbers starting with the text that is in the Search Field. For instance, if the letter J is entered in the Search Field, then you will see all part numbers starting with the letter J.
<> operator	= "Mfg" <> [Manufacturer]	Return all part numbers for manufacturers other than the selected one.
Nested Ands	=And(And("Mfg"=[Manufacturer], "Device"=[Device Type]), "Color"=[Color])	Return all part numbers for a given manufacturer, device type, and color -- e.g. all black Cisco routers.

Nested And/Or	=Or(And("Device"=[Device Type], "Color"=[Color]), "Mfg"=[Manufacturer]))	Return all part numbers that match the device type and color, or the manufacturer -- e.g. all black routers as well as all Juniper devices.
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## Workflow Automation

GoFormz Workflow Automation lets you set up form actions that happen automatically based on certain triggers. For example, you may want to send an email to the customer whenever a form is completed. In this case, form completion is the trigger, and emailing the customer is the action.

Workflow automation lets you implement and enforce business processes around form completion. Instead of asking all employees to remember to execute various steps of a form workflow (e.g. emailing certain people upon form completion, storing completed forms in Box, etc.), these steps can be automated, making the whole process more streamlined and less error-prone. This is a powerful tool for collaboration, compliance, and overall efficiency. At the end of this article, we go over an extended use case of automation that should make this versatility clear.

**Workflows are set up on a per-template level.** This means that a given workflow only operates on forms created from a specific template, and you can set up separate workflows for different templates. For instance, you can have one set of workflows for your Work Order Form, and another for your Service Activation Form. The one exception to this is email notifications, which can be set up on a per-template level or a global account level.

**A template can have multiple workflows.** For example, you may want to automatically transfer a work order to a supervisor once a technician completes it and then save it to Box once the supervisor signs off on it.

A workflow event is composed of a trigger (what initiates the workflow) and an action (what you want GoFormz to do when the trigger occurs). Let's look at some examples of workflow events:

- When Jane Doe completes a Work Order form, transfer it to John Q Manager
- When a Supervisor completes a Work Order form, email the customer
- When anyone in the organization receives a Work Order form transfer, send them a notification on their mobile device

In all of these examples, the portion before the comma is the trigger, and the portion after the comma is the action.

### Triggers

A trigger is what activates the workflow. A trigger has two components -- who does it, and what they do. The "who" can be an individual user (e.g. Jane Doe), a user group (e.g. Supervisors), or any user in your GoFormz account. The "what" can be one of the following:

- **Form completion:** When the user hits the Complete button on a form.
- **Form transfer:** When the user receives a form via a form transfer.
- **Public form submission:** When a Public Share form is submitted for a form owned by the user.

## Actions

Actions are what you want GoFormz to do when the trigger occurs. GoFormz currently supports the following actions:

- **Email:** Send an email to an email address or addresses of your choosing.
- **Notify:** Send a notification to the mobile device of the current form owner.
- **Tag:** Associate a tag with the form.
- **Transfer:** Transfer the form to another user or group.
- **Save to Box:** Upload a PDF of the form to Box.

## Automatic Email Notifications

GoFormz workflow automation provides a way to automatically send an email based on various triggers -- like when a form has been completed, or submitted by someone outside your account. You can specify the email's distribution list, subject line, body text, and PDF attachment.

**Important note:** This article is about setting up automatic email notifications at the template level via the Template Events window.

### Example Use Cases

There are many reasons to set up automatic emails:

- You may want to automatically send a copy of the form to your customer once the form is completed. This is frequently used for customer-facing forms like work orders.
- You may want to use email as a notification tool, alerting an employee that a form has been assigned to them -- much in the same way that device notifications are used.
- You may want to share the form to stakeholders within your organization. For instance, when a work order form is completed for a customer, you may want to share its contents with that customer's account rep. This person might not have a GoFormz account, but may want to know when a work order is fulfilled for one of their customers.

## Automatic Email Notifications

To set up automatic email notifications for a form template, do the following.

1. Navigate to the **Templates Tab** and click the form template for which you want to set up automatic email notifications. The Template Editor will launch.
2. Click the **Manage Events** link at the top of the editor to open the Manage Template Events window.

Sample Work Order **Manage Events**  
You have unsaved changes

VIEW Form List Page Editor

**AXIS MOBILITY** 12345 Main St.  
Suite 1102  
San Diego, CA 92109  
(800) 867-5309

**Work Order Report**

Company Name:

WORK ORDER #:   
DATE:   
JOB STATUS: ☒ Complete ☒ In Progress ☒ Incomplete

3. Click the **Add Trigger** button to create a new event, or select an existing event to edit it.

**Manage Template Events**

Triggers In-Use **Add Trigger** Delete

When this happens

Do the following

4. In the **When this happens** section, configure the event trigger by selecting a **User** and a **Trigger**. In this example, the event will trigger whenever a user in the Supervisors group completes a form.

### When this happens

5. Select **Email** from the dropdown under **Do the following**.
6. Set the distribution list by adding one or more email address in the **To:**, **CC:** and **BCC:** areas, as shown below. When using multiple email addresses, use semi-colons to separate them. This field supports GoFormz Variables, which is very powerful because it allows you to insert an email address



from your form right into the email distribution list. I

7. Enter the email's subject line in the **Subject** area. This field also supports GoFormz Variables. The form name is included by default via the [FORMNAME] variable, but you can modify the text to suit your needs.

8. In the **Body** area, enter the boilerplate text for your email. You can use a selection of standard text formatting tools here, which let you change the font/size/color of your text, add bullets, change text alignment, etc. This field also supports GoFormz Variables allowing you to include any information captured in the form.

#### Do the following

The screenshot shows the email configuration interface. At the top, there is a dropdown menu labeled 'Email' with a downward arrow. Below this, there are three input fields: 'To:' containing '[Customer Email]', 'CC:' containing '[EMAILADDRESS]', and 'BCC:'. The 'Subject:' field contains '[FORMNAME] is complete'. The 'Message Body:' section features a rich text editor with a toolbar including options for font (Tahoma), bold (B), italic (I), underline (U), text color (A), background color (A), link (ab), and list/bulleted options. The body text reads: 'summary of the work order. Thank you for your business! Lead technician on site: [Technician] Total cost of job: [Total Cost] Summary of work done: [Work Summary]'. Below the text, a note states: '[FORMNAME], [COMPLETEDDATE], [EMAILADDRESS], [USERNAME], [OWNER\_NAME], [OWNER\_EMAILADDRESS], or any other field name in brackets [field name] can be used as placeholder text.' At the bottom, the 'PDF pages:' dropdown is set to 'All pages'.

9. In the **PDF pages** dropdown, select which form pages should appear in the PDF attached to the email. The default “All pages” option will attach a PDF of the entire form.

10. Finally, click the **Save Changes** button at the bottom to finish setting up automatic email notifications.

## Automatic Transfer of Form To Another User

Oftentimes, multiple people must touch a form before it is completed. For instance, a technician may fill out the bulk of a work order, and then pass it off to their supervisor to sign off and complete the form. GoFormz supports this kind of workflow by allowing you to transfer a draft form to another user in your account, or to a predefined group of users.

Some forms have to be processed by several different teams or individuals before they are complete. For instance, for a work order form:

- A dispatcher may start filling out the form by entering the customer's information and request;
- A field technician may continue by entering the work they performed; and
- A supervisor may finish the process by approving and signing the form.

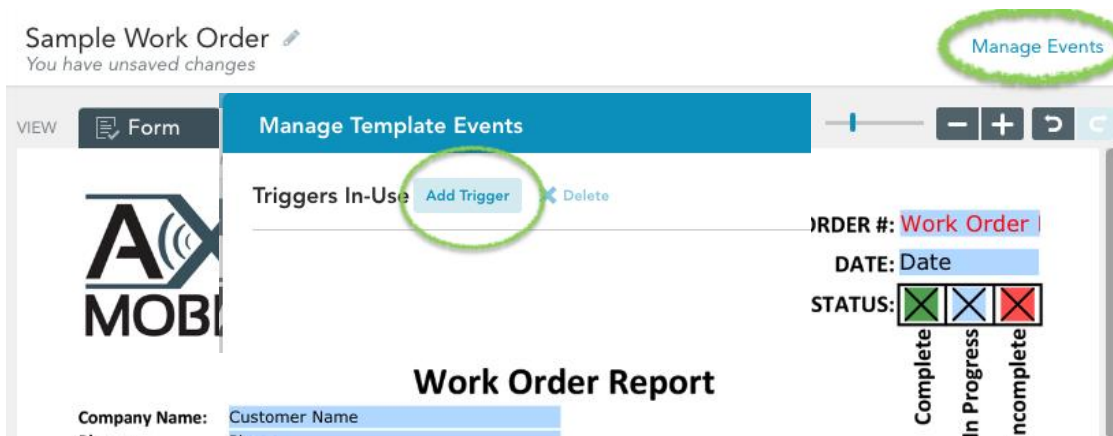
Instead of having each user remember who needs to get the form next, it's much easier to set up an automatic transfer workflow. This is especially useful for organizations with many different forms, each of which has complex approval flows.

### Process

To set up auto-transfer for a form template, follow the steps below

Navigate to the **Templates Tab** and click the form template for which you want to set up auto-transfer rules. The Template Editor will launch.

1. Click the **Manage Events** link at the top of the editor to open the Manage Template Events window.



2. Click the **Add Trigger** button to create a new event, or select an existing event to edit it.
3. In the **When this happens** section, configure the event trigger by selecting a **User** and a **Trigger**. In this example, the event will trigger when any user in the Field Techs group completes a

form.

**When this happens**

Field Techs	Completes form
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4. Select **Transfer** from the dropdown under **Do the following**.
5. In the **Transfer to** dropdown, select the user or group that should receive the form transfer. In this example, the form is transferred to the Supervisors group for approval. Note that when a completed form is transferred, it becomes a draft form in the new user's account.

**Do the following**

Transfer

Transfer to:

Supervisors

*Transferring a form will re-open it as a draft and re-assign it to the user defined here.*

6. Click the **Save Changes** button at the bottom of the Template Events window to complete the transfer automation process.

## Tagging Forms

Tags provide a way to group related forms together. This makes it easier to organize your forms and find what you are looking for.

Users can assign tags to an individual form, or you can automate the tag assignment process via Workflow Automation. All your tags appear in the Forms Tab, where you can filter your forms list by tag.

There are many different ways that tags can be used. Here are a few common examples:

- Tag by form template: You may want to have a separate tag for each type of form that you use in GoFormz -- e.g. separate tags for your Work Orders, your Expense Reports, your Service Activation Forms, etc.
- Tag by customer name: You may want to tag all your forms by customer name. This way you can quickly pull up all forms related to each customer.
- Tag by customer category: If your organization has so many customers that tagging by individual customer gets too messy -- you can tag by customer category instead. This can take many different forms -- e.g. customer geographic region, the name of the account rep for that customer, customer industry, etc.
- Tag by technician: You may want to tag Work Order forms with the name of the technician who worked on them.
- Tag by order/ticket/incident type: For Work Orders, you may want to tag by the type of Work Order -- e.g. A/C installation, A/C repair, heating unit repair, etc.

## TAGGING FORMS AUTOMATICALLY

GoFormz workflow automation provides a way to associate tags with your forms automatically, rather than tagging each form individually.

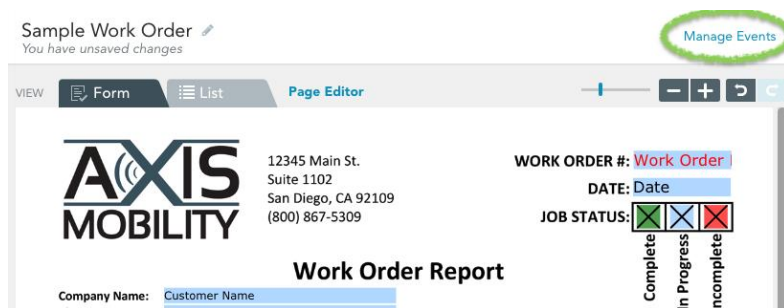
## Example Use Case

You may want to tag all your work order forms with the name of the customer that requested the work order. That way, you can easily filter your forms by customer in the future. You can ask all your technicians to tag the forms manually when they complete them, but this is a potentially messy and error-prone process (what if they forget? what if they misspell the customer name?). Instead, it is much easier to set up an automated workflow that tags each form appropriately.

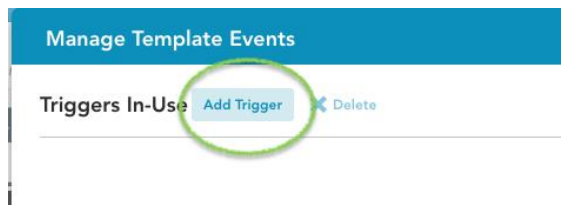
## Process

To set up auto-tagging for a form template, do the following.

1. Navigate to the **Templates Tab** and click the form template that you want to auto-tag. The Template Editor will launch.
2. Click the **Manage Events** link at the top of the editor to open the Manage Template Events window.



3. Click the **Add Trigger** button to create a new event, or select an existing event to edit it.



4. In the **When this happens** section, configure the event trigger by selecting a **User** and a **Trigger**. In this example, the event will trigger when any user completes the form.

### When this happens

Anyone	Completes form
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5. Select **Tag** from the dropdown under **Do the following**.

6. In the **Tag** field, enter either a single tag, or a comma-separated list of tags. Tags can be static (e.g. “My tag”) or dynamic (e.g. the customer name from the form).
  - “Work Order” is a static tag; and
  - “[Customer Name]” is a dynamic tag that takes the value found in the form’s [Customer Name] field.

### Do the following

Tag

▼

Tag:

Work Order, [Customer Name]

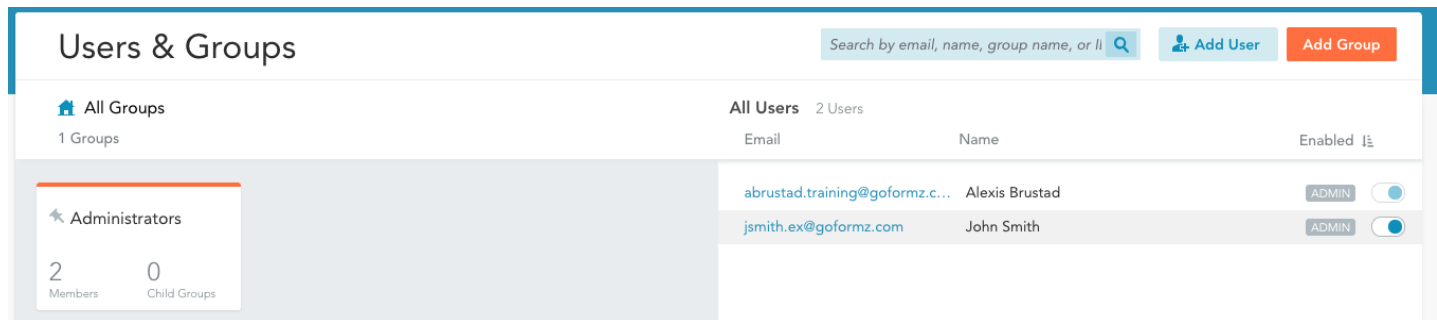
[FORMNAME], [COMPLETEDDATE], [EMAILADDRESS], [USERNAME], [OWNER\_NAME], [OWNER\_EMAILADDRESS], or any other field name in brackets [field name] can be used as placeholder text.

7. Click the **Save Changes** button at the bottom to complete the tag automation process.

## Users, Groups and Permissions

User groups are an important tool for controlling user permissions, as well as for fostering collaboration within your organization. In this article, we go over how to create a user group, configure group permissions, assign users to the group, change group permissions, and delete a group.

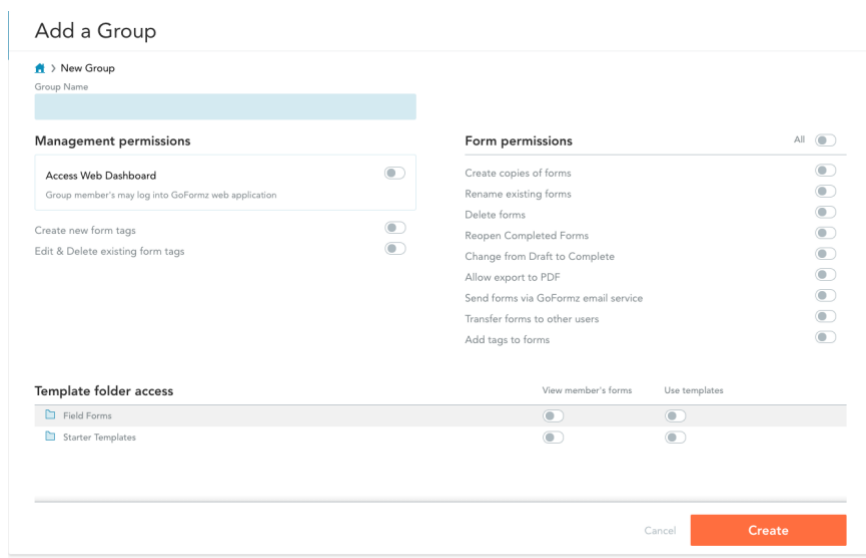
All of these actions begin on the Users screen. To open it, click your username in the top right corner to expand the account management dropdown, then select **Users & Groups** from the dropdown.



### Creating a user group

To create a new user group, do the following:

1. **Create the group.** Click the **Create Group** button at the top right of the Users screen. The **Create Group** window pops up.
2. **Name your group.** Enter a name for your group. In this example, our group is called Field Techs.



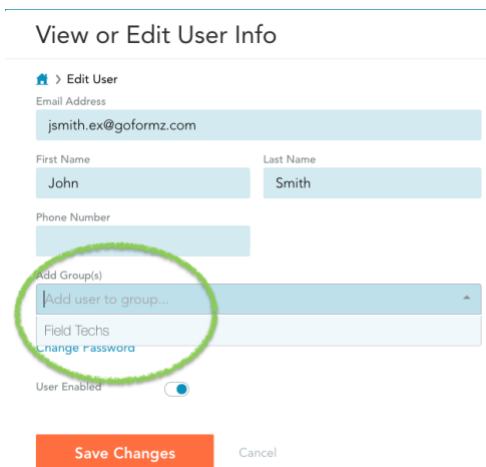
3. **Set functionality permissions.** Check the boxes for the functionality permissions that you want this group to have. In this example, the group has permissions for all form tasks, but will not be able to manage templates, view reports, or access the management site. These permissions are not set in stone -- you can change them later by editing the group.

4. **Set template folder**

**permissions.** If you have template folders, set those permissions at the bottom of the window.

In this example, the group has permissions to use templates from the Field Forms folder; it does not have permissions for the HR Forms folder, or to view other users' forms.

5. **Save your new group.** Click the **Save** button to finish creating the group. You will see the new group in the list.




### Moving users into and out of a group

To assign users to a group or move users out of a group, check the boxes next to the users that you want to move. In this example, we've selected Frank Smith and Jane Doe.


Then click the **Move to Group** button at the top, opening the **Move To Group** dialog box.

- To assign the selected users to a group, choose your group from the dropdown menu and click **Move**.
- To move the selected users out of a group, just click the **Move out of group** button.

### Changing group permissions

To change the permissions of an existing group, simply click the  icon next to your group name. You will see an **Edit Group** window displaying your group permissions. Change the permissions as needed, and click **Save** to save your edits. You can also change the group name here.

### Deleting a group

To delete a group, simply click the  icon next to the group, then click **Yes** in the confirmation dialog box. Deleting a group will not delete any of the users in the group -- it will simply move those users out of the group to the top level.

## Reports

Reporting is a key piece of what GoFormz does. When you and your colleagues fill out forms, you generate a lot of data. This data can be used to analyze various aspects your business -- be it productivity, compliance, costs, or anything else. GoFormz reports helps you do exactly that.



## What is a report?

A report in GoFormz consists of data about multiple forms presented in table format. Typically, each column in the report represents a form field, and each row represents a form. (The exception to this is when you report on form fields that are within a table; then you may have multiple rows per form.)

The example below shows a simple GoFormz report. Each row in this report corresponds to a form. For each form, the columns show the form Name along with several form fields -- Date, Technician, Customer Name, Total Cost, and Total Hours. This report is based on the Sample Work Order template that comes with your GoFormz account.

Report options

Filters: [Apply Filters](#) [Add Filter](#)

Technician

is equal to

Brent

Remove

Name	Date ^	Technician	Customer Name	Total Cost	Total Hours
Sample Work Order - 12/7/2015 - Brent	12/7/2015	Brent	Chase Care Center	1267.5	6
Sample Work Order - 12/8/2015 - Brent	12/8/2015	Brent	Madison Care Center	14218.78	5.5
Sample Work Order - 12/9/2015 - Brent	12/9/2015	Brent	Madison Care Center	2097	10
Sample Work Order - 12/10/2015 - Brent	12/10/2015	Brent	Casa Palmera Care Center	985.5	6
Sample Work Order - 12/11/2015 - Brent	12/11/2015	Brent	Madison Care Center	1048.5	3
Sample Work Order - 12/11/2015 - Brent 2	12/11/2015	Brent	Casa Palmera Care Center	5577	6
Sample Work Order - 12/14/2015 - Brent	12/14/2015	Brent	Scripps Memorial Hospital	30540.25	11
Sample Work Order - 12/15/2015 - Brent	12/15/2015	Brent	Scripps Memorial Hospital		7
Sample Work Order 5/5/2016	5/5/2016	Brent	Beverly Healthcare	1363.05	
Sample Work Order 5/6/2016	5/6/2016	Brent	Beverly Healthcare	549.25	7

*GoFormz reports are dynamic.* As more and more forms are completed, the data from those forms gets folded into the report if it meets the filter criteria you set for the report. For instance, the report above is filtered to show all work orders submitted by technician Brent. So every time Brent completes another form -- it will get added to this report, and any summary columns and charts will get recalculated.

## Key Functionality

So what can you do with a report in GoFormz? Here are some highlights:

- Create reports based on a single form template, or across multiple templates.
- Filter your reports to zero in on just the data you need.
- Export reports in CSV and PDF formats, so you can share your data with others.
- Add charts -- including bar charts, pie charts, and line graphs -- to bring your reports to life.

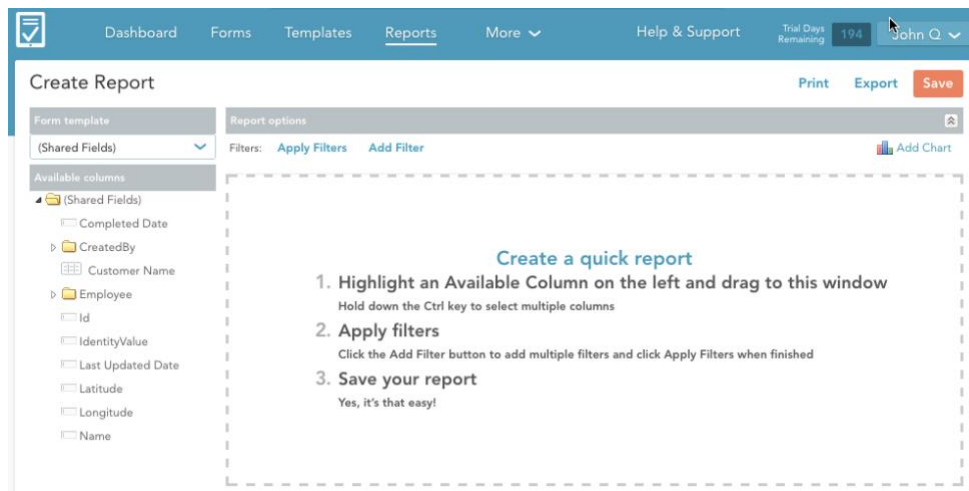
- Schedule reports to run periodically and send you email notifications.

## Report Data

Any data in your form that can be represented as text (e.g. numbers and dates) can be included in a report. Data that cannot be represented as text (e.g. images and maps) cannot be included in a report. To be more precise:

Here are the steps for **creating a report** in GoFormz.

**1. Begin the creation process.** To create a new report, navigate to the Reports Tab and click the **Create** button in the upper right. The Report Editor will appear.



Fields for the report can be selected from the left side of the editor, filters are along the top, and some brief instructions appear in the report preview area.

**2. Add template.** To create a report for a specific form template, select the template from the **Form template** dropdown menu in the top left corner of the editor. All the fields for that template will appear in the **Available columns** area. In this example we selected the Sample Work Order template that comes standard with your GoFormz account. Note that in addition to the fields from your chosen template, there are several Shared Fields -- like form Name and ID -- that are common across multiple templates.

**3. Add columns.** To add columns to a report, simply drag the fields you want in your report to the report preview area. The preview immediately updates to show sample data; note that this is sample data only -- you will not see all entries from your report here. In this example, we've added the Name,

Date, Customer Name, Total Cost, Total Hours, and Technician columns.

Form template  
(Shared Fields), Sample W...

Report options

Filters: [Apply Filters](#) [Add Filter](#) [Add Chart](#)

Available columns

☐ Address  
☐ Adjusted  
☒ another one  
☒ Check Box Group 39  
☐ City  
☐ Customer Sig Date  
☐ Date  
☐ Discount  
☐ Discount Level  
☐ Drop Down 44  
☐ dt test  
☐ Image Notes  
☐ Identifier  
☒ Job Status  
☐ Location

Name	Date	Customer Name	Total Cost	Total Hours	Technician
Sample Work Orde...	6/5/2016				
Sample Work Orde...	8/31/2015	B V General Inc.			
St2	12/7/2015	Graybill Medical G...			
Sample Work Order		Birch Ptrick Conval...			
Sample Work Orde...	12/7/2015	B V General Inc.			
Sample Work Orde...	9/1/2015	B V General Inc.			
Sample Work Orde...	9/1/2015	B V General Inc.			
Sample Work Orde...	4/29/2016	Faith Jones Assoc			
Sample Work Orde...	10/2/2015	Beverly Healthcare			
Sample Work Orde...	5/6/2016	Beverly Healthcare	549.25	7	Brent
Sample Work Orde...	5/20/2016				
Sample Work Orde...	8/22/2015	Casa Palmera Care...			
Sample Work Orde...	8/26/2015	B V General Inc.	\$7,793.50	7:00	Rick
Sample Work Orde...	8/26/2015	Chase Care Center	\$243.00		

**4. Apply filters.** Applying filters to your report allows you to limit the report to just the information that you want. You can add filters in the **Report options** area at the top of the editor. Just click **Add Filter** and choose the options you want. You can remove a filter at any time with the **Remove** button. After adding or removing a filter, don't forget to click **Apply Filters** to save your changes and update the view in the report preview area.

In this example, we have added two filters to the report -- the first limiting the range of dates, and the second specifying a technician. This report will only include data from forms filled out by Brent after 12/01/2015.

Form template  
(Shared Fields), Sample W...

Report options

Filters: [Apply Filters](#) [Add Filter](#) [Add Chart](#)

Available columns


☐ Address  
☐ Adjusted  
☒ another one  
☒ Check Box Group 39  
☐ City  
☐ Customer Sig Date  
☐ Date  
☐ Discount  
☐ Discount Level  
☐ Drop Down 44  
☐ dt test  
☐ Image Notes  
☐ Identifier  
☒ Job Status  
☐ Location

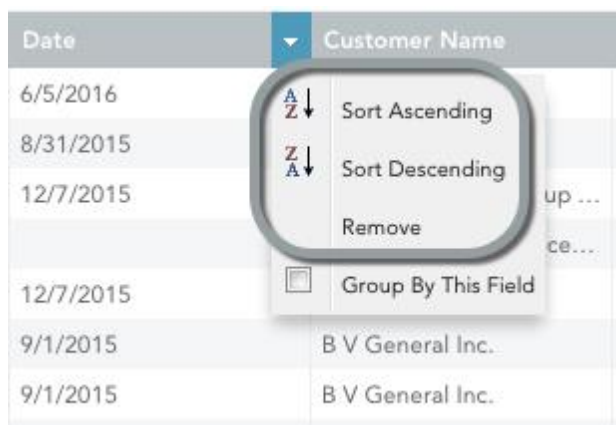
Date  
is greater than  
12/01/2015  
Remove

Technician  
is equal to  
Brent  
Remove

Name	Date	Customer Name	Total Cost	Total Hours	Technician
Sample Work Order 5/...	5/6/2016	Beverly Healthcare	549.25	7	Brent
Sample Work Order - ...	12/8/2015	Madison Care Center	14218.78	5.5	Brent
Sample Work Order - ...	12/9/2015	Madison Care Center	2097	10	Brent
Sample Work Order - ...	12/10/2015	Casa Palmera Care Ce...	985.5	6	Brent
Sample Work Order - ...	12/11/2015	Madison Care Center	1048.5	3	Brent
Sample Work Order - ...	12/11/2015	Casa Palmera Care Ce...	5577	6	Brent
Sample Work Order - ...	12/14/2015	Scripps Memorial Hos...	30540.25	11	Brent
Sample Work Order - ...	12/7/2015	Chase Care Center	1267.5	6	Brent
Sample Work Order - ...	12/15/2015	Scripps Memorial Hos...		7	Brent
Sample Work Order 5/...	5/5/2016	Beverly Healthcare	1363.05		Brent

**5. Organize your data.** In the last two steps, we chose *what* data will be displayed in the report by selecting columns and filtering on the rows. Next, let's decide *how* this data should be presented. There are a few things you can do here:

- Rearrange the columns by clicking a column name, dragging it to the left or right, and dropping it in the desired position.
- Change column width by hovering between two column names until the  cursor appears, then click and drag left or right to resize the column.
- Sort on a column by hovering over the column name, clicking the small dropdown arrow that appears, then selecting **Sort Ascending** or **Sort Descending** to perform the sort.
- Remove a column if you've added it in error by selecting the **Remove** option in the dropdown menu.



Date	Customer Name
6/5/2016	
8/31/2015	
12/7/2015	
12/7/2015	
9/1/2015	B V General Inc.
9/1/2015	B V General Inc.

In this example, we've rearranged the columns in a more logical order, changed the widths so the data fits, and sorted by date.

Form template

(Shared Fields), Sample W...

Available columns

- ☐ Address
- ☐ Adjusted
- ☒ another one
- ☒ Check Box Group 39
- ☐ City
- ☐ Customer Sig Date
- ☐ Date
- ☐ Discount
- ☐ Discount Level
- ☐ Drop Down 44
- ☐ dt test
- ☐ Image Notes
- ☐ Identifier
- ☒ Job Status

Report options

Filters: [Apply Filters](#) [Add Filter](#) [Add Chart](#)

Date is greater than 12/01/2015 [Remove](#)

Technician is equal to Brent [Remove](#)

Name	Date ^	Technician	Customer Name	Total Cost	Total Hours
Sample Work Order - 12/7/2015 - Brent	12/7/2015	Brent	Chase Care Center	1267.5	6
Sample Work Order - 12/8/2015 - Brent	12/8/2015	Brent	Madison Care Center	14218.78	5.5
Sample Work Order - 12/9/2015 - Brent	12/9/2015	Brent	Madison Care Center	2097	10
Sample Work Order - 12/10/2015 - Brent	12/10/2015	Brent	Casa Palmera Care Center	985.5	6
Sample Work Order - 12/11/2015 - Brent	12/11/2015	Brent	Madison Care Center	1048.5	3
Sample Work Order - 12/11/2015 - Brent 2	12/11/2015	Brent	Casa Palmera Care Center	5577	6
Sample Work Order - 12/14/2015 - Brent	12/14/2015	Brent	Scripps Memorial Hospital	30540.25	11
Sample Work Order - 12/15/2015 - Brent	12/15/2015	Brent	Scripps Memorial Hospital		7
Sample Work Order 5/5/2016	5/5/2016	Brent	Beverly Healthcare	1363.05	
Sample Work Order 5/6/2016	5/6/2016	Brent	Beverly Healthcare	549.25	7

**6. Create groupings and summary columns.** The next step is to select a column to group on. Grouping on a column will subdivide your report into groups based on the values in your chosen column. In the example below we grouped on the Customer Name column -- and you can see that the report is now divided into 4 groups, corresponding to 4 different customers. To create a group, hover over a column

name, click the dropdown arrow that appears, and select **Group By This Field**.

Perhaps the biggest value of grouping is that it allows you to create summary columns. Once you've created a grouping, open any other column's dropdown. You will see additional options here that were not present before you created the group -- **Count**, **Sum**, **Min**, **Max**, and **Avg**. Select one of these to create a summary column using the chosen operation. In this example, we've created summary columns from Total Cost and Total Hours, using the **Sum** operation for both. In other words, the report shows the total cost and total hours summed up by customer.

Form template: (Shared Fields), Sample W...

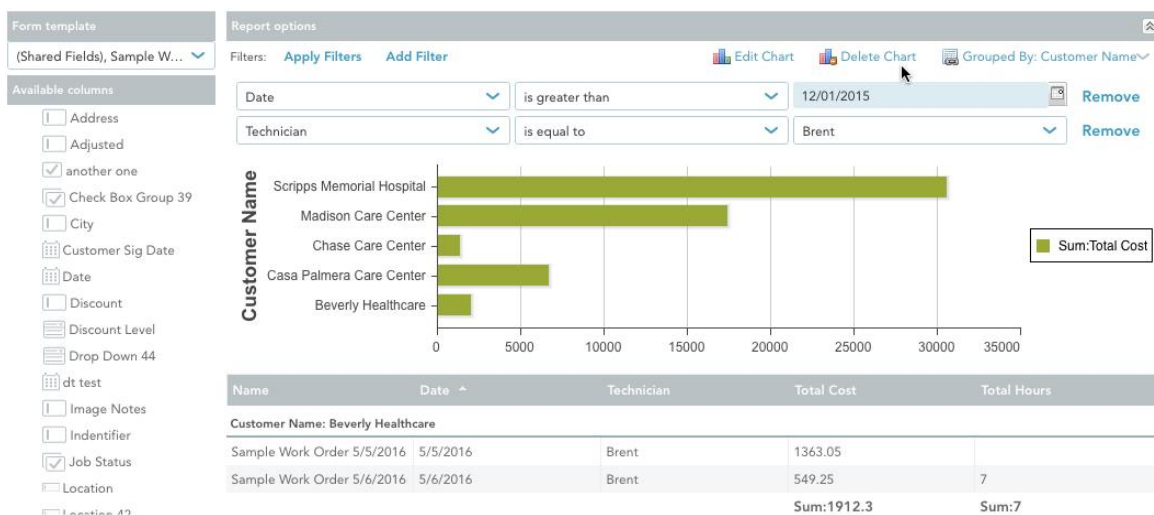
Report options: Add Chart, Add Filter, Grouped By: Customer Name

Filters: Apply Filters, Add Filter

Available columns: Address, Adjusted, another one, Check Box Group 39, City, Customer Sig Date, Date, Discount, Discount Level, Drop Down 44, dt test, Image Notes, Identifier, Job Status, Location

Name	Date	Technician	Total Cost	Total Hours
Customer Name: Beverly Healthcare				
Sample Work Order 5/5/2016	5/5/2016	Brent	1363.05	
Sample Work Order 5/6/2016	5/6/2016	Brent	549.25	
Sum:			1912.3	7
Customer Name: Casa Palmera Care Center				
Sample Work Order - 12/10/...	12/10/2015	Brent	985.5	6
Sample Work Order - 12/11/...	12/11/2015	Brent	5577	6
Sum:			6562.5	12
Customer Name: Chase Care Center				
Sample Work Order - 12/7/...	12/7/2015	Brent	1267.5	6
Sum:			1267.5	6

**7. Add a chart.** You can add a simple chart to your report by clicking the **Add Chart** button in the **Report Options** area. The **Chart Designer** will launch, letting you create line, bar and pie charts. Note that you must have at least one summary column in your report before you can create a chart. In this example, we've generated a chart on total costs by customer.



**8. Save your report.** When you're done setting up your report, click the **Save** button at the top, then

give your report a name in the dialog box that appears, and click **OK**. Once the report has been saved, you can access it in the Reports Tab, where you can view the report and perform other operations like exporting, printing, copying, etc.



Enter a name for this report:

Customer rollups

Cancel

OK