User Guide

GoFormz Mobile Forms app for Windows

How to navigate this User Guide

This User Guide is organized into the following sections:
- **Overview**: A brief summary of the GoFormz Mobile Forms app for Windows and its capabilities.
- **Login screen**: How to log into and start using the app.
- **Navigation and Core Components**: Introduction to the app's navigation and functionality centers: the Navigation Panel, the Forms List, and the Form Viewer.
- **Key Functionality:** Review of the app's core functionality — creating and editing forms.
- **Form transfers and status changes**, **Other form actions**, and **Non-form actions**: These three sections describe all the actions you that can perform in the app.
- **Settings and Logout**: Review of the Settings screen and how to log out of the app.

If you are new to GoFormz and just getting started, we recommend you begin by reading the Overview, Navigation and Key Functionality sections, to get a fuller sense of the app's capabilities. If you are familiar with GoFormz and just want to better understand a particular action, just select that action from the table of contents below.

Note: The app uses responsive design, so the screenshots in this documentation might not match your experience precisely, depending on your screen dimensions. However, they will match sufficiently to enable you to follow all instructions.

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Overview

The GoFormz Mobile Forms app for Windows lets you fill out and manage your forms on a Windows device. This includes the following functionality:
- Create new forms from a template
- View your forms collection and fill out forms
- Manage existing forms, including editing, deleting, renaming, etc.
- Transfer forms to other users and receive dispatched forms
- Transfer forms to collaborate with colleagues and partners
- Download form PDFs
- Work online or offline

Things that you *cannot* do with the app include creating/editing templates, creating/viewing reports, or managing your account. The app's primary purpose is to make filling out forms on a Windows device easy and convenient.

A very high-level GoFormz use case might be:
- Your GoFormz admin creates a template using the web interface. This makes the template visible to users in your account, including yourself.
- You and others in your organization use the mobile app to fill out forms using the new template as necessary.
- Your admin aggregates the form data submitted by everyone to compile reports and extract business insights.

Notice that the mobile app is only concerned with the second bullet point of this use case. You will have to log into the GoFormz web interface to perform the other actions.

The GoFormz Mobile Forms app for Windows can be used on any Windows 10 device, including smartphones, tablets and desktop devices, with the best experience on tablets and desktop devices.

Login Screen

When you first run the GoFormz Mobile Forms app on your Windows device, you will see the app's login screen.
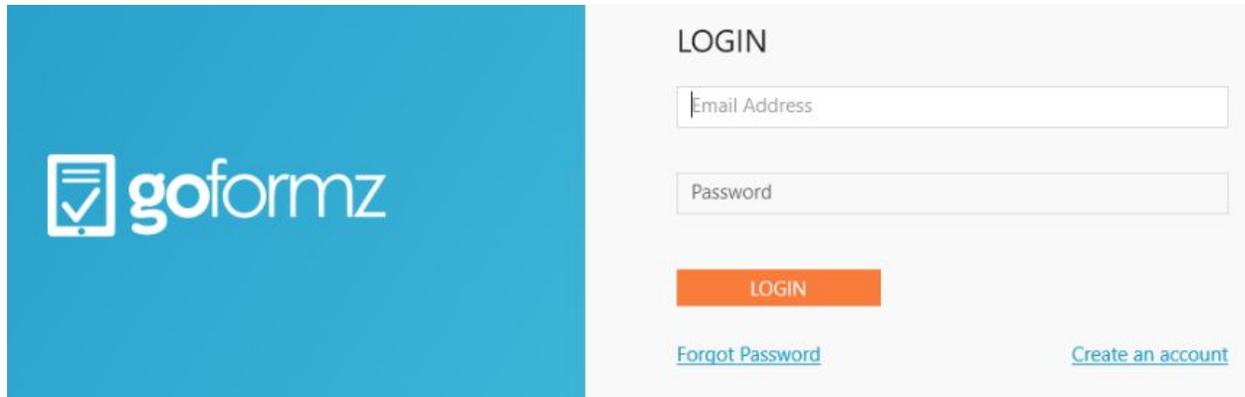

If you already have a GoFormz account, you can use this screen to log in. If you have an account, but can't remember your password, you can reset your password. And if you do not have an account, you can create one.

Log in

To log in, simply enter your Email Address and Password in the fields provided, and press the **Login** button. In the example below, we are logging into the account of the user with email address johnq@goformz.com.
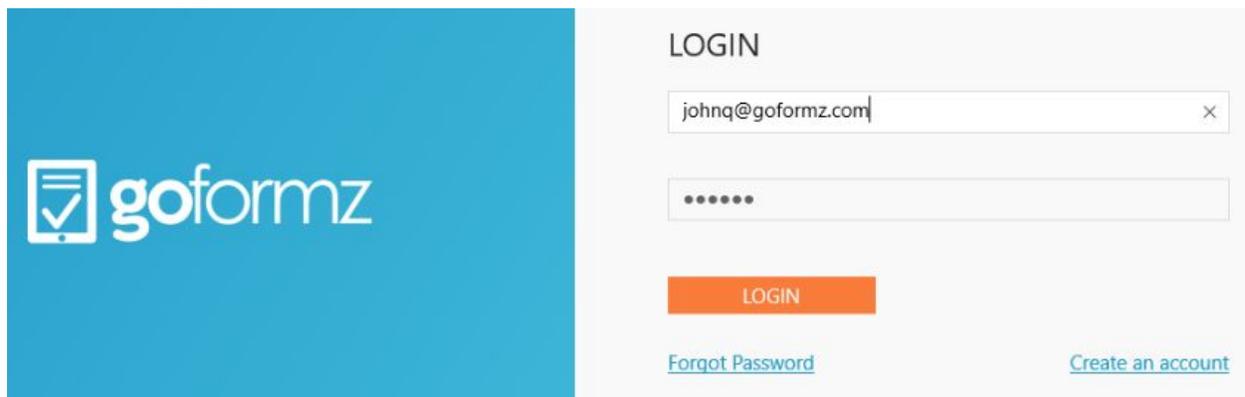
Reset your password

If you forgot your password, simply press the **Forgot Password** link. Your browser will open to the GoFormz password reset page, where you will be instructed to submit your email address. Once you do so, you will receive an email that will guide you through the password reset process.

Forgot your password?

Enter your email address to reset your password.

johnq@goformz.com

Submit

Create a new account

Most app users will never need to create an account — for the most part, if you are using the app you probably already have an account. However, if you are a brand new GoFormz user, this option is here for you.

Create a new account on the login screen by pressing the **Create an account** link. You will be prompted to enter your personal and company information (see below). Press the **Create Free Account** button when you are done filling out all the fields. You will immediately be logged into your brand new account.

Create Free Account

johnq@goformz.com	••••••
John	Quincy
GoFormz	415-555-5555
100 - 9,999	Technology
United States	Promo Code

Create Free Account

I already have an account

By creating an account you agree to the GoFormz *Privacy Policy* and *Terms of Use*

By default, your new account will contain several templates:
- **Read Me**: A brief intro with some useful information to get you started with GoFormz.
- **Templates Quick Start Guide**: Some tips on how to create form templates.
- **Sample Work Order**: An example work order template that includes most field types offered by GoFormz.
- **A folder of Starter Templates**: Templates for some of the most common form types, including expense reports, timesheets, project proposals, and more. Use these as a starting point for building your own templates.

Creating new forms using these templates is a great way to learn about GoFormz and try out the features. However, to use the app for one of your real-life use cases, you will likely want to log into the web interface and build your own form template first.

Navigation and Core Components

There are three places in the app that serve as its navigation and functionality centers: the Navigation Panel that is always present on the left side of the app, and the Forms List and Form Viewer screens where you will spend most of your time as an app user. In this section, we go over these three core app components.

Navigation Panel

The Navigation Panel can be found on the left side of the app, and is always visible regardless of where you are in the app.
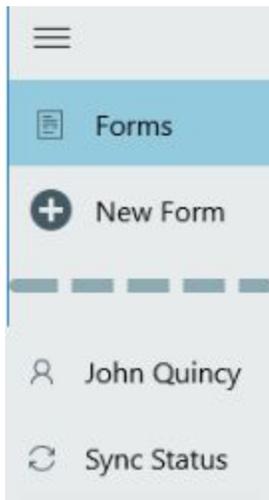
The panel contains the following buttons:
- ☰ : Toggle all button labels on and off (e.g. display 📄 **Forms** vs just 📄). This is handy in case you forget what the icons mean.
- 📄 **Forms**: Open the Forms List, where you can view a list of all your forms and allows you to manage those forms.

- ⊕ **New Form**: Create a new form based on any of the templates available to you, and launch the new form in the Form Viewer.
- ⊠ **<YourUsername>:** Open the **Settings** screen, which lets you change personal settings, log out of the app, and view app information.
- ⟳ **Sync Status:** See when the app last sync'ed to your GoFormz account, and perform a manual sync if needed.

Forms List

You can access the Forms List via the ▤ **Forms** button in the navigation panel. This screen's purpose is to help you quickly locate any of your existing forms and manage them. Finding the form you want is accomplished primarily through filtering and sorting.

Filtering. The Forms List uses three tabs and a menu option to filter forms by their status and assignment:
- **Drafts:** List of all forms with Draft status that are assigned to you.
- **Completed:** List of all forms with Completed status that are assigned you.
- **All Forms**: List of all forms that are currently assigned to you. This is combination of the previous two tabs.
- **Shared Forms**: List of all forms assigned to any group of which you are a member. This is accessible via the **View Shared Forms** option in the **[...]** menu in the upper right.
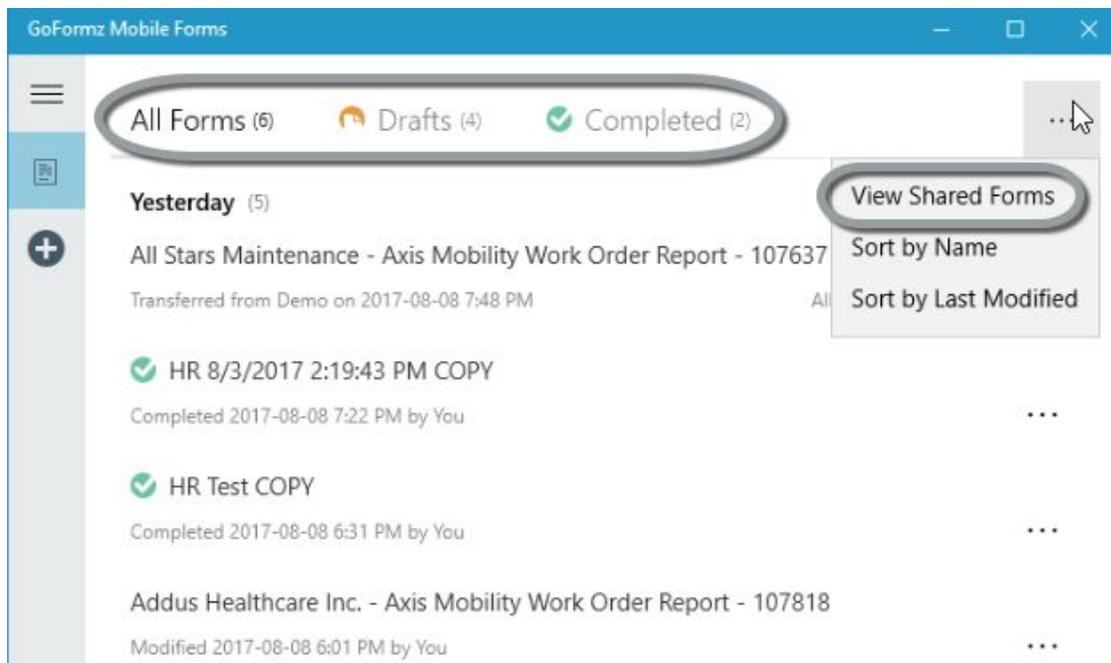
Sorting. You can sort any of these form lists by name or by last modified timestamp using the **Sort by Name** and **Sort by Last Modified** options from the **[...]** dropdown menu in the upper right corner.

Actions. Once you find the form that you are looking for, there are a few things that you can do with it:

- Tap/click the form name to view or edit it in the Form Viewer.
- Use the **[...]** dropdown menu to the right of the form to perform another action on the form. The following actions are available (Note that you may only have a subset of these options, depending on your user permissions.):
  - **Complete (Drafts only)**: Change form status from Draft to Completed.
  - **Reopen (Completed forms only)**: Change form status from Completed back to Draft
  - **Rename**: Change the form's name.
  - **Delete**: Delete this form
  - **Copy**: Create a copy of this form, retaining all completed fields.
  - **Download PDF**: Download this form in PDF format.
  - **Transfer (Drafts only)**: Transfer this form to another user or group.
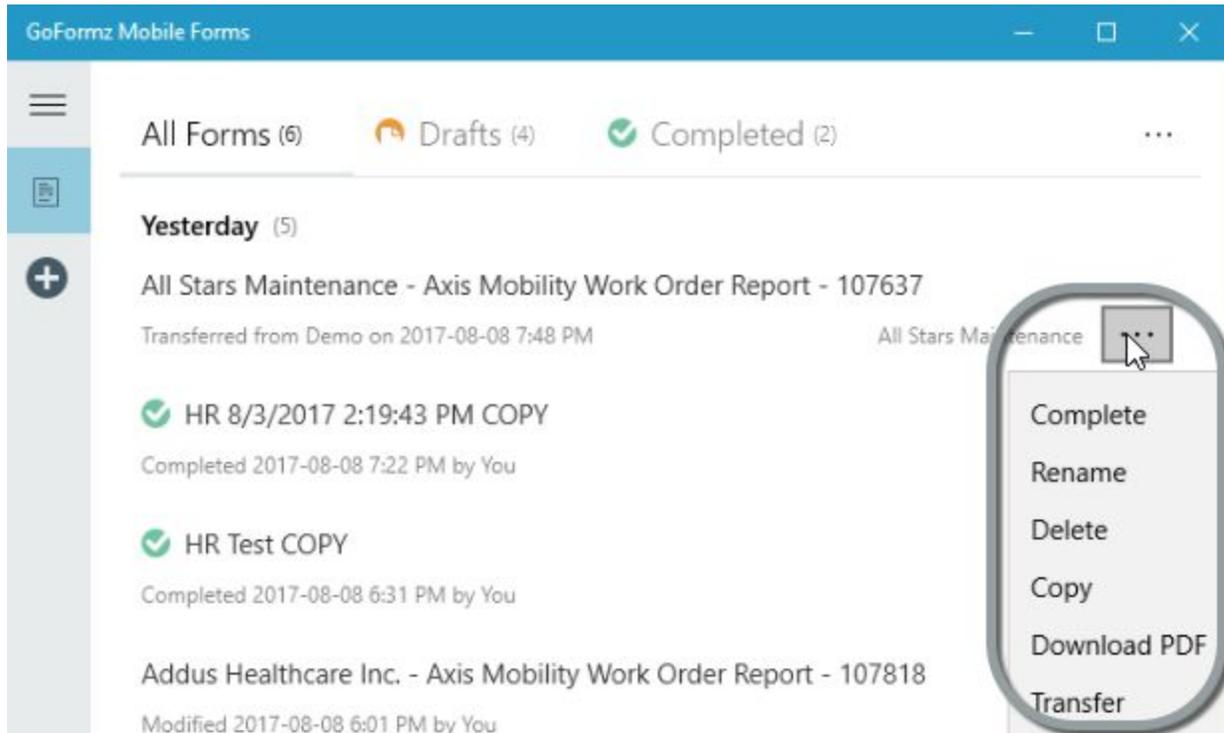
Metadata. Finally, notice that each form in the list will display the following metadata underneath its name:

- The last **action** that was performed on this form: e.g. "modified", "transferred" or "completed".
- The **timestamp** when this action occurred.
- The **user** who performed the action.
- Any **tags** associated with the form. (Note that while the tags are displayed, you cannot manage them via this app.)

In the example below, the action is "transferred", the timestamp is "2017-08-08 7:48 PM", the user is "Demo" and the tag is "All Stars Maintenance".
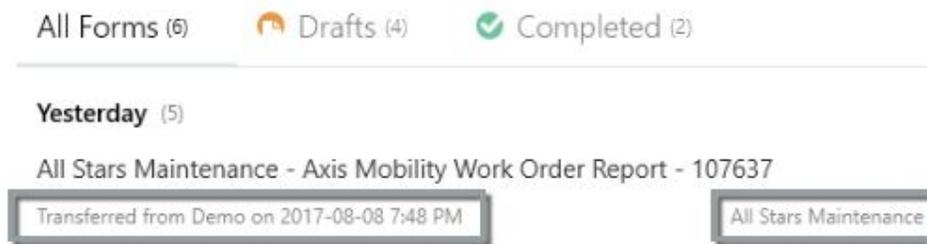
Form Viewer

The Form Viewer allows you to view and/or edit an individual form. You can access this screen by selecting an existing form from the Forms List, or via the form creation workflow.

Editable fields in the form will be highlighted, as shown above. Press any one of these fields to fill it out. Note that only Draft forms will have editable fields when opened in the Form Viewer. Completed forms will not be editable.

In addition to its main functions of letting you view and edit a form, there are several other actions available in the form header. Depending on your screen size, these options will either be represented by icons in the header, or be available through the **[...]** menu in the upper right:

- ⊘ **Complete (Drafts only)**: Change form status from Draft to Completed.
- ↻ **Reopen (Completed forms only)**: Change form status from Completed back to Draft
- **Rename**: Change the form's name.
- 🗑 **Delete**: Delete this form
- **Copy**: Create a copy of this form, retaining all completed fields.
- ↓ **Download PDF**: Download this form in PDF format.
- ⇄ **Transfer (Drafts only)**: Transfer this form to another user or group.

To go back to the Forms List, just press the ← button in the upper left. This will save your form and open the Forms List.

Key Functionality: Form Creation & Editing

The main purpose of the GoFormz Mobile Forms app for Windows is to allow users to create and fill out forms. We go over these two key functions here.

Creating a new form

To create a new form, press the ⊕ **New Form** button in the Navigation Panel. You will be directed to select a template, as shown below.
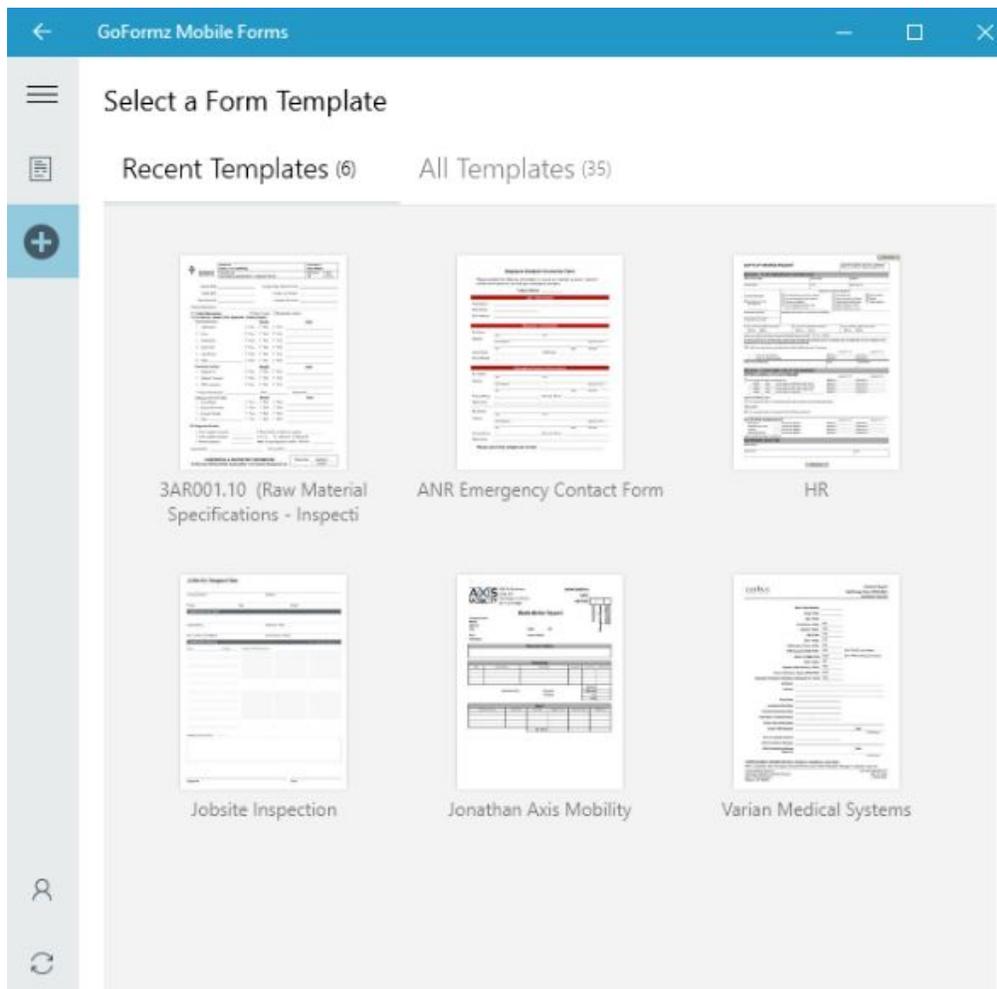
The template screen has two tabs:
- The **Recent Templates** tab lists the templates that you have accessed most recently.
- The **All Templates** tab lists all templates that are available to you.

Press the desired template to launch the Form Viewer with a brand new form created from that template.

You are now ready to fill out the form.

Filling out (editing) a form

To continue editing an existing form, open it from the [Forms List](#). To begin filling out a new form, go through the [form creation](#) flow. Either way, you will end up in the [Form Viewer](#) screen.

When you open a form in the Form Viewer, any editable fields will be highlighted. To fill out a field, tap/click its highlighted area. An input control will appear, letting you fill out the field. There are many different controls that range from a simple textbox with a cursor prompting you to type in some text, to a set of drawing tools letting you upload an image and sketch on top of it, as shown below.
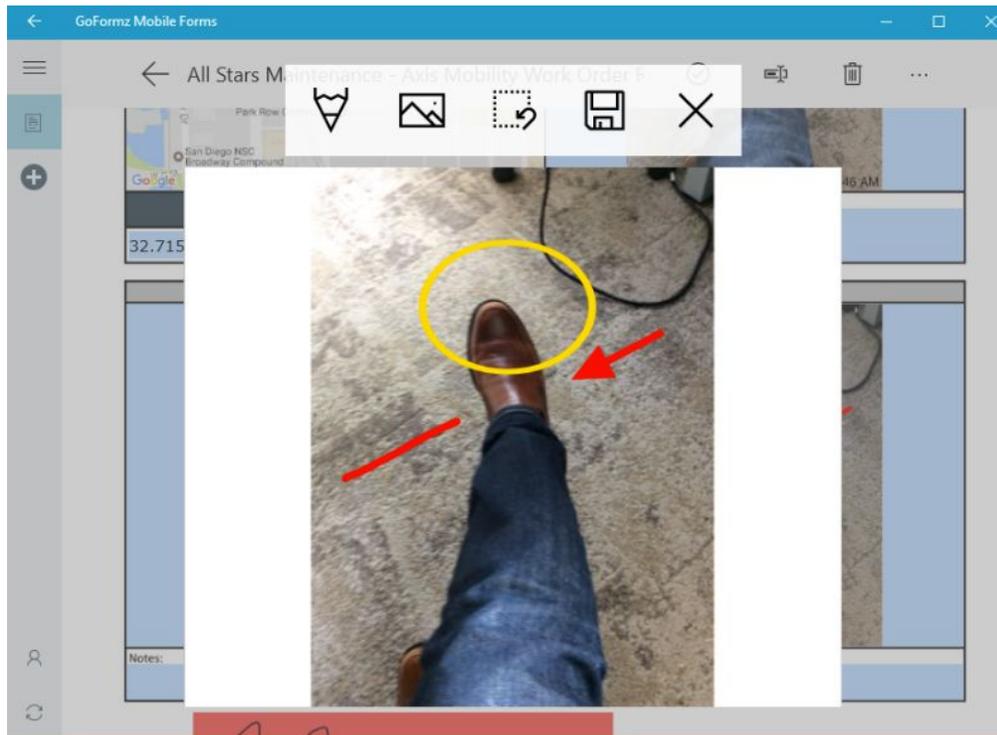
We do not go over the details of how to use each control, but you can browse our [overview of all available field types](#) to get a good sense of what is available.

The Form Viewer will automatically save any changes you make to the form. This means you can stop filling out the form at any point, and then come back to it later.

Once you are done filling out a form, you will typically want to either [complete it](#) or [transfer it to another user](#).
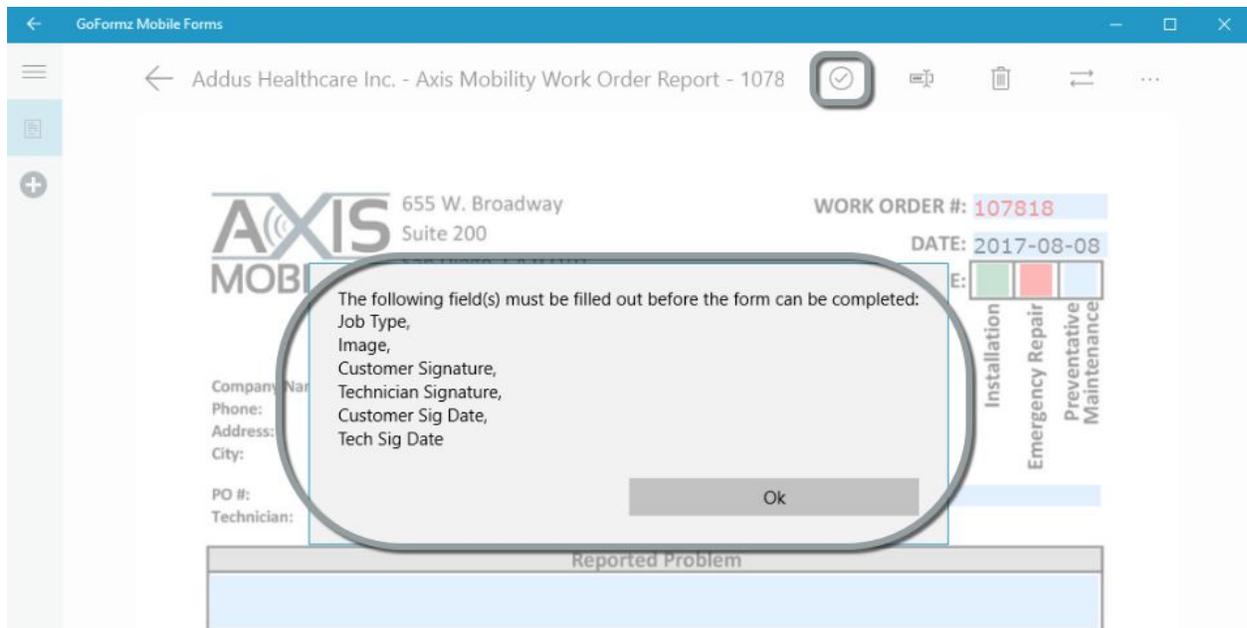
Form transfers and status changes

The actions described in this section have to do with transferring forms to other users and changing form status from Draft to Completed or vice versa.

Completing a form

Completing a form means changing its status from Draft to Completed. This option is available in the Form Viewer header, as well as the Forms List form dropdown.

If there are required fields that you have not filled in, you will see an error message telling you that the form cannot be completed until these fields are filled in, and listing all relevant fields. Dismiss the error message, fill in those fields, and try completing the form again.

When you successfully complete the form, the ⊘ **Complete** button will change to a ↻ **Reopen** button (if you have the associated permissions), and field highlighting will disappear in the Form Viewer, indicating that you can no longer edit the form. If you wish to edit the form again, you will have to reopen it first.

If you are online when you complete your form, the app will immediately sync to your GoFormz account, uploading the newly completed form so that others can view it. If you are offline, the sync will happen as soon as you get online.

Reopening a form

Reopening a form means [changing its status](#) from Completed back to Draft. This is typically done when you find an error in a completed form, since reopening the form is the only way to fix such an error. Note that depending on your [user permissions](#), you may not be able to reopen forms.

To reopen a completed form, use the ↻ **Reopen** action available in the [Forms List](#) and [Form Viewer](#). The ↻ **Reopen** button will change to a ⊘ **Complete** button, and field highlighting will appear in the Form Viewer, indicating that you can now edit the form.

Transferring to another user

Oftentimes, multiple people must touch a form before it is completed. For instance, two technicians might work on different aspects of a work order, and therefore may have to fill out different portions of the work order form. GoFormz supports this kind of workflow by allowing you to transfer a form draft to another user or to a predefined group of users. To learn more about user groups, see the Users, Groups and Permissions documentation.

To transfer a form, use the ⇄ **Transfer** button available in the Forms List and Form Viewer.

The **Transfer Form** panel will appear, listing the users (icon) and groups (icon) in your organization. There are three tools that you can use here to find your transfer target:
- Scroll the alphabetically ordered list.
- Use the **Users** and **Groups** checkboxes to filter the list by showing/hiding users and groups, respectively.
- Start typing the name of the desired target in the search box, and the list will filter as you type.

Transfer Form   ✕

Who are you transferring to?

| Search by user or group name |

Show ☑ Users ☑ Groups

User / Group Name

⚲ Account Management

⚬ Alex Rennie
  arenniedemo@goformz.com

⚬ Alexis Brustad
  abrustaddemo@goformz.com

⚬ Amy
  aciminodemo@goformz.com

⚬ Andrew Stevens
  astevensdemo@goformz.com

⚬ Andrew Yi
  ayidemo@goformz.com

⚬ Angela
  akennistondemo@goformz.com

Once you have found your target user or group, press it to complete the transfer. The form will immediately disappear from your **Drafts** list and you will see a "Form Transferred" notification on your device. (Note that only Draft forms can be transferred — Completed forms cannot be transferred.)

If you find yourself transferring forms to the same users/groups over and over again, we recommend that you create an automatic workflow that performs the transfer for you. See here for instructions on creating an automatic transfer workflow.

Claiming a transferred form

If a form was transferred to you individually, the form will immediately appear in the **Drafts** tab of your Forms List. You can simply tap/click the form name to start editing it.
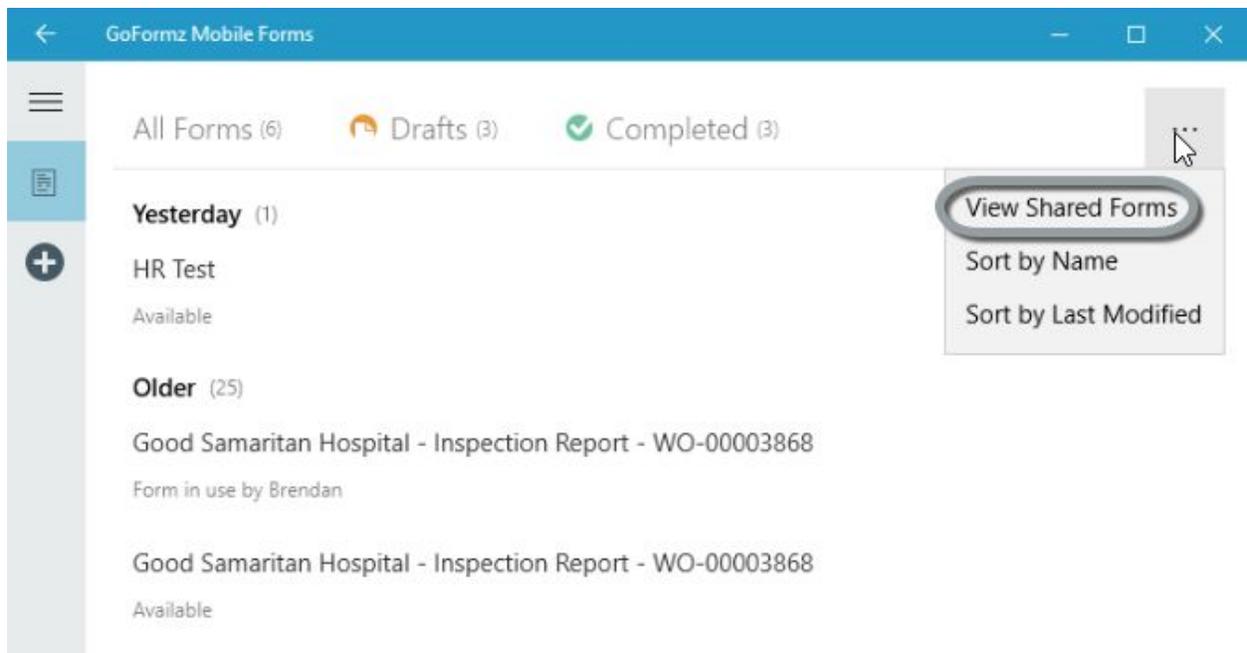
If the form was transferred to a group in which you have membership, you have to go to the Shared Forms list to claim it. You can access the Shared Forms list in the Forms List screen by selecting the **View Shared Forms** option from the **[...]** menu in the upper right (shown above). To claim the form, simply tap/click it and then press **Yes** in the confirmation dialog box.

Any user within the share group can take ownership of a shared form in this way. Once you take ownership, the form will appear in your **Drafts** tab, allowing you to edit it as needed. The form will still appear in the Shared Forms list for all the other users in the group, but it will be marked as "in use" (see below). While you have the form is in use, no one else will be able take ownership of it until you share it back to the group. This ensures that two people can never edit the same form at the same time, creating a conflict.
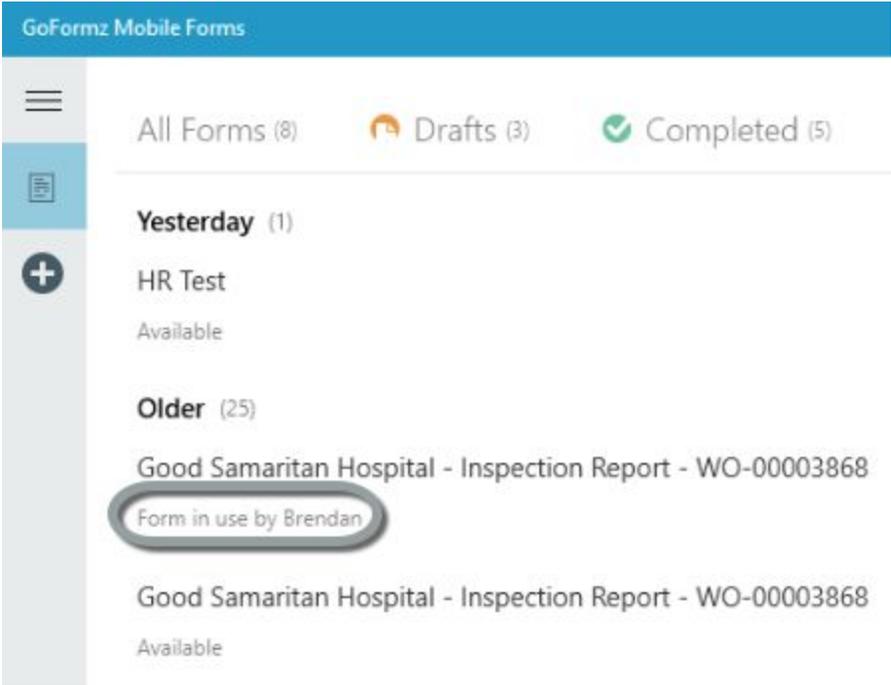
Other form actions

This section describes some additional actions that you can perform on forms.

Downloading a PDF

To download your form in PDF format, use the ⤓ **Download PDF** button available in the [Forms List](#) and [Form Viewer](#). You will see a standard Windows **Save As** dialog box, letting you enter the name of your PDF and select the folder where it should be placed. Press **Save** when you are done, to place the PDF in the desired folder on your device.
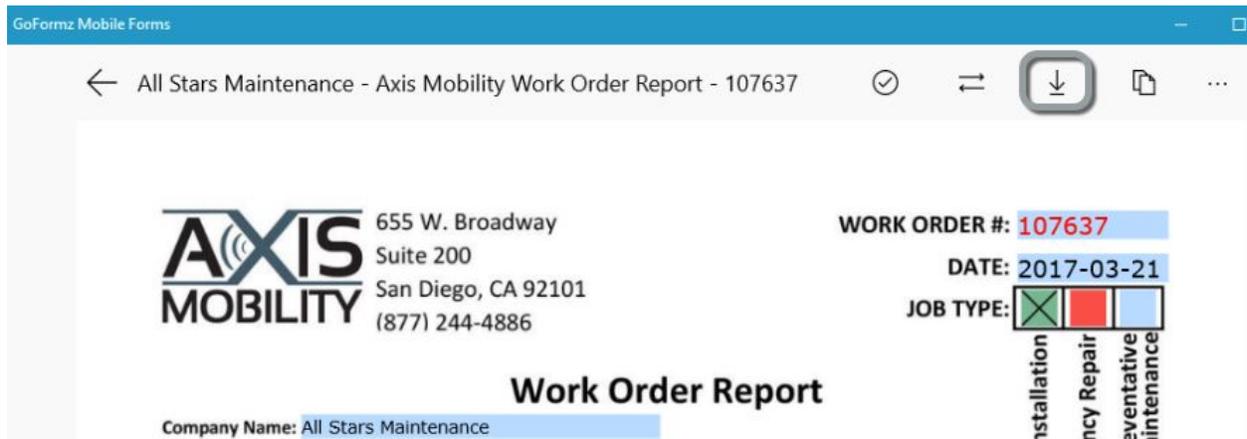

Renaming a form

To change your form's name, use the 🖉 **Rename** action available in the [Forms List](#) and [Form Viewer](#). A dialog box will appear with the form's current name and a cursor, letting you edit the name. Press the **Rename** button when you are done editing, and you will see the name change.

If you find yourself renaming your forms often, consider changing the automated naming convention using the [Template Editor](#). By default, forms are named using the template name followed by the form creation timestamp, but this can easily be changed.
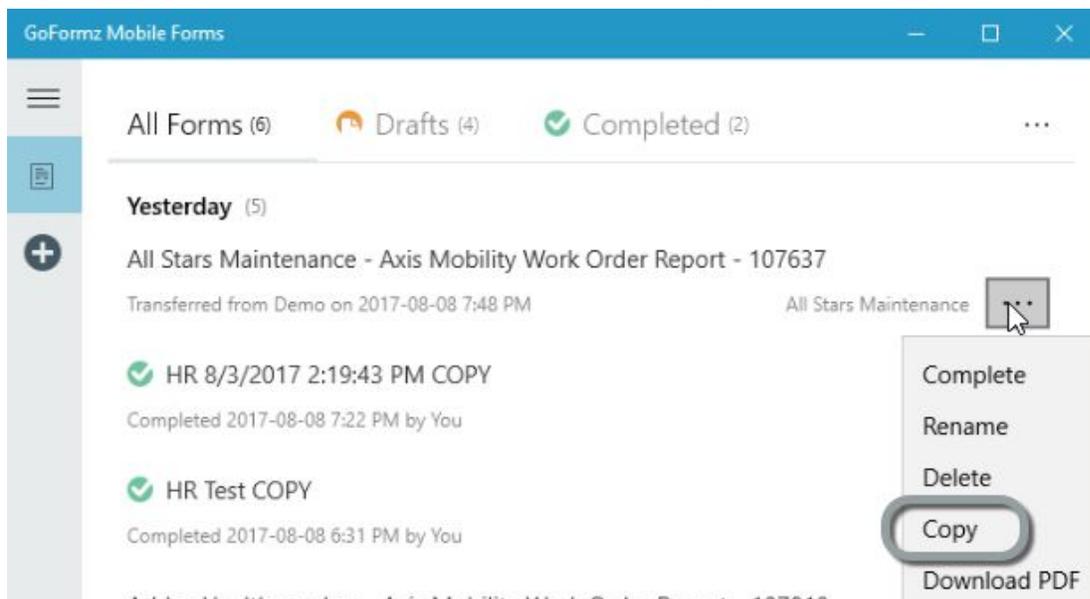
Deleting a form

To delete a form, use the 🗑 **Delete** button available in the [Forms List](#) and [Form Viewer](#), then press **Delete** in the confirmation dialog box. The form will disappear from the Forms List.
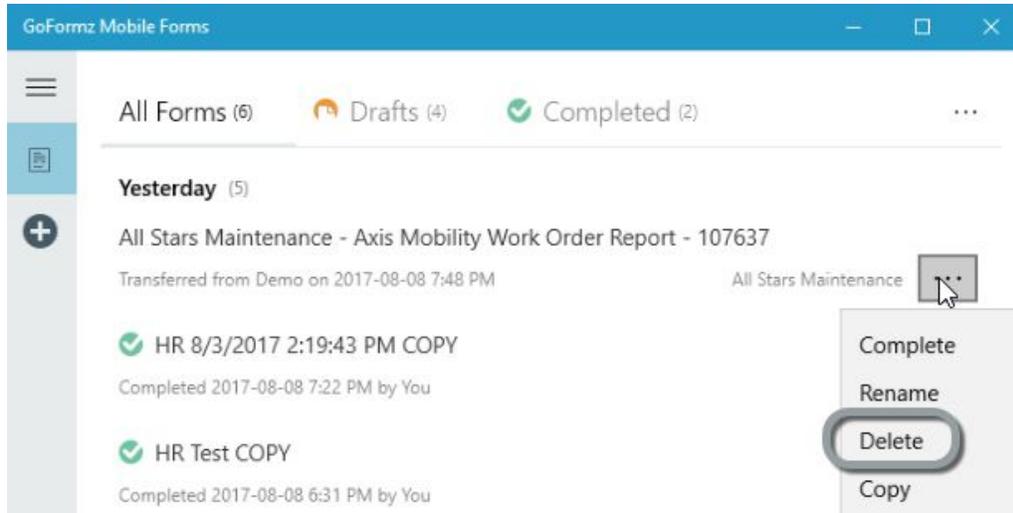
Deleted forms cannot be restored, so be careful when deleting forms! If you do need to restore a deleted form, contact GoFormz Support.

Copying a form

To make a copy of your form, use the 📄 **Copy** button available in the [Forms List](#) and [Form Viewer](#). A copy of the form will immediately appear in your **Drafts**, with the same name as the original form, followed by the word "COPY". You will typically want to [rename](#) the copy.

Copying a form can be useful when you want a new form that shares a lot of data with a form that you've already filled out. In such a situation, copying the existing form and changing the few fields that are different can save time over filling out a blank form from scratch.

Non-form actions

This section describes actions that do not directly affect a form. There is only one such action currently.

Sync-ing the app to your account

The purpose of sync-ing your GoFormz Windows app is to make sure that the app and your account both have all the latest data. The sync does two things:

- Send any changes you made on your device since the last sync back to your account. This includes form creations, deletions and status changes.
- Fetch any changes that have happened in your account since the last sync to your device. This may include any new forms that have been assigned to you, any new templates that were created, etc.

The app automatically syncs every few minutes and an immediate sync is also triggered by a form completion, so you should not have much of a need to perform a manual sync — but it's there if you need it.
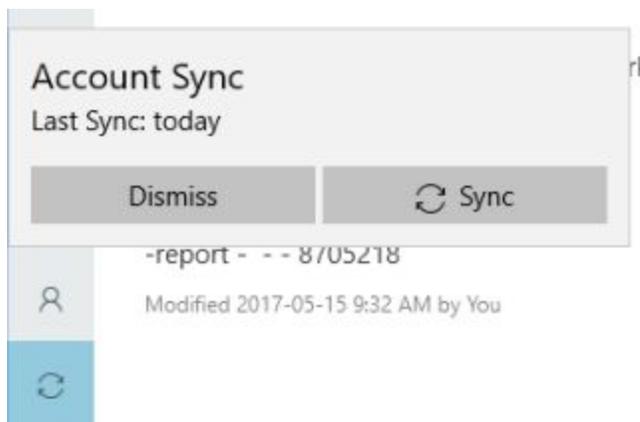

To see when your app was last sync'ed and/or perform a manual sync, press the ⟳ **Sync Status** button in the [Navigation Panel](). The **Account Sync** dialog box will appear, showing the date of your last sync. Press **Dismiss** to close the dialog box, or **Sync** to perform a manual sync.

Settings and Logout

To access your account and app settings, press the ⚇ button in the [Navigation Panel](#) on the left side of the app. You will see the following options:

- **Logout**: Press this to log out of the GoFormz Mobile Forms app for Windows.
- **Personal Info:** Press this to view and/or edit your personal information, including your name, phone number, and Pin Code. Note that you cannot change your email address here. You can only [change your email address](#) in the GoFormz web interface.
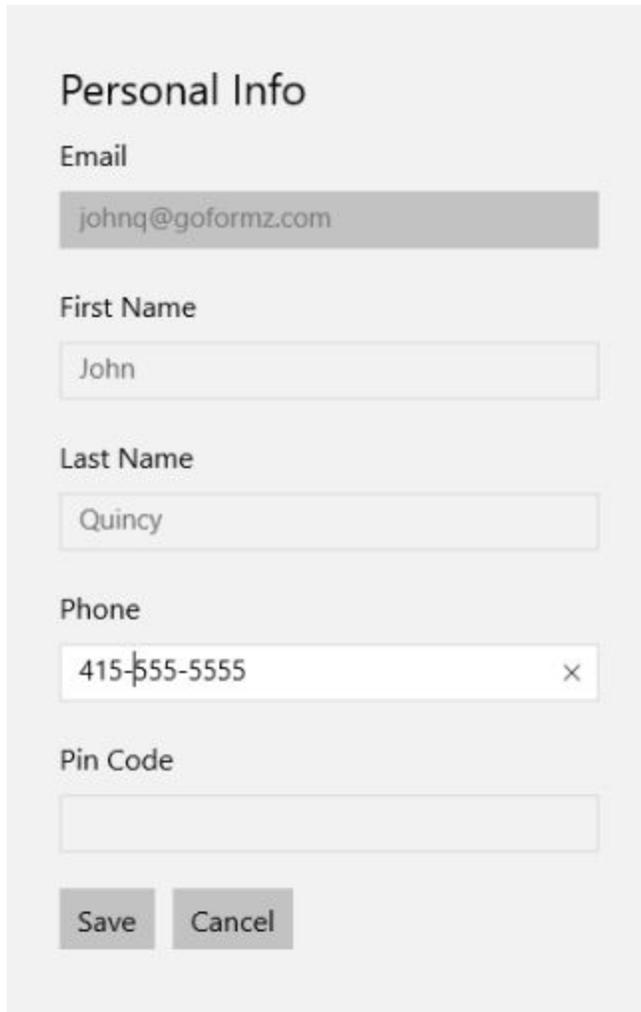
Personal Info

Email

johnq@goformz.com

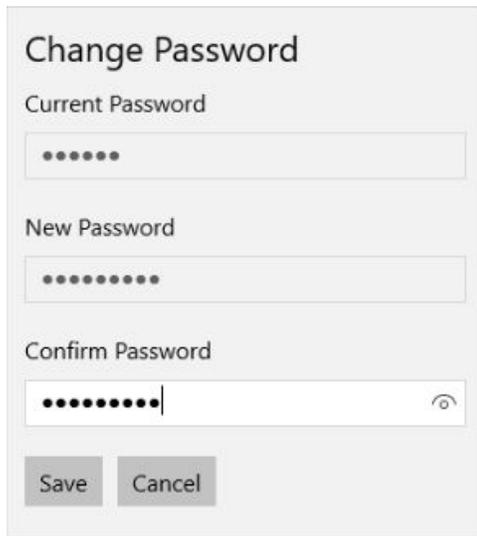First Name

John

Last Name

Quincy

Phone

415-555-5555   ✕

Pin Code

Save   Cancel

- **Change Password:** Press this to change your password. You will be asked to type in your current password, then type in the new one twice, and press **Save**. Next time you log into the app, you will need to use the new password.

- **About:** View details about your GoFormz app, including the version and environment.
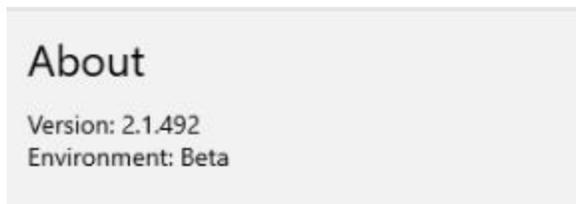
- **Terms and Conditions:** View the GoFormz Terms of Service agreement.
- **Privacy Policy:** View the GoFormz Privacy Policy.