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*natural*Forms® V2.4.0
Powered by E⊠PEDATA

User Guide
For iPad iOS 10.3.1

CAPTURE, STORE & SHARE

capture • store • share

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Introduction

The iForm Pro user guide provides all the information needed to get started with iForm Pro and to maximise on it's benefits.

iForm Pro seemlessly automates the collection of handwriting and other methods of input (graphics, photos, drawings, annotations, GPS locations, and voice memos) in an electronic format.

Captured information is immediately converted to digital data, verified for accuracy and integrated into your backend systems.

This straight-through processing capability eliminates third party data entry and verification as well as related time delays, resulting in unsurpassed workflow optimization and significant cost savings.

Installing iForm Pro

iForm Pro uses the naturalFORMS application on your tabletas a platform for creating, completing and submitting iForms.

To install the naturalFORMS application simply open the App Store on your e-device, search for naturalFORMS and download the enterprise version. Please remember that you will need to sign in using you Apple ID.

When the application has been installed the naturalFORMS icon will appear on the home screen of your e-device, if you wish you can drag it into the favourites bar at the bottom. Tap this icon to open the application. Note that your tablet must be online in order to login to the naturalFORMS application for the first time.

Logging into iForm Pro

To login to the naturalFORMS application you will need three things: a user ID, a password and the name of the server to which will connect to.

The URL for the iForm Pro server is: **https://forms.iformpro.co.uk**

For more information on how to obtain a natural FORMS license, please contact the iForm Pro Support team at **support.footprint-solutions.co.uk** or email sales@footprint-solutions.co.uk

When you have entered your credentials, tap the lock to sign in.

If login is unsuccessful, please verify that your user ID, password and the server address are correct and that your iPad is still connected to the internet. If you are still experiencing issues logging in to the application, please contact the iForm Pro support team for assistance.

Section 2
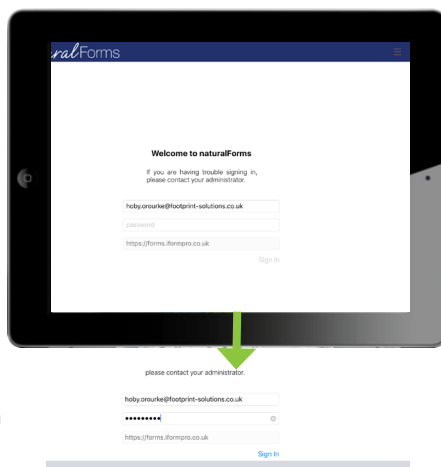
Configuring Settings

To access the configuration options, tap the Tools menu icon and select Settings.
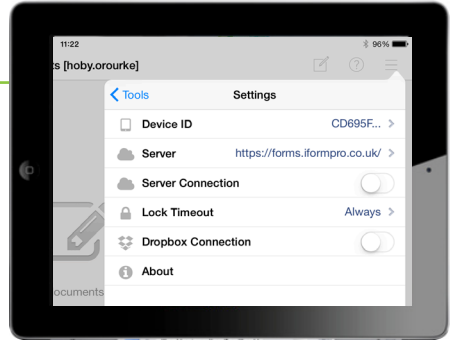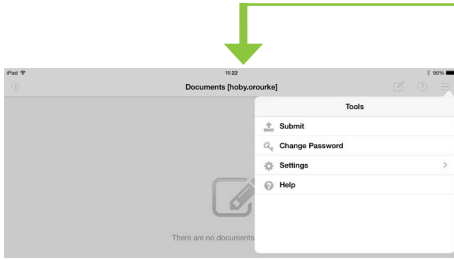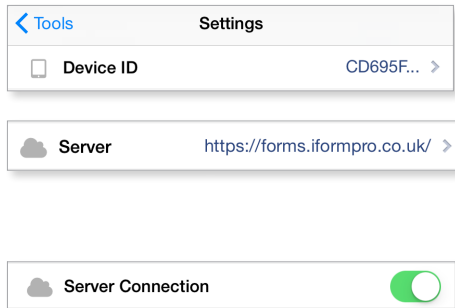

Settings Options

Device ID - Your Device-ID identifies your tablet and must be registered on the server prior to S.

Server - Server refers to the address of your server. The server must be set when you login to naturalFORMS and cannot be changed without uninstalling and reinstalling the application.

Server Connection - It is recommended to set this option to ON. A network connection is required to login for the first time, to download updated iForm templates and to submit completed iForms to the server.

Offline mode - If you are experiencing connectivity issues you may need to work offline. To do this set the 'server connection' to OFF. The next time you log in, the application will remember the settings of your last login. Please remember that you will need to set this option to ON when you wish to submit your iForms using naturalFORMS.

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Settings Options Continued

Lock Timeout - This option controls how long naturalFORMS runs in the background on the tabletbefore requiring the user to login to naturalFORMS again. If you are experiencing connectivity issues and need to open the application in offline mode, we recommend switching the lockout timer from 'Never' to 'Always' to prevent the application from automatically logging in.

🔒 Lock Timeout	Always ›
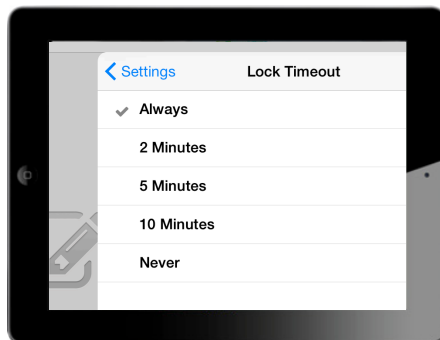
Dropbox Link:

This option allows naturalFORMS users to link to a Dropbox account. Once the account is linked, users can send PDF files of iForms directly to Dropbox with one tap.

To setup a Dropbox Link, set this option to ON. Then enter the credentials for your Dropbox account and confirm that naturalFORMS is allowed to access your Dropbox folders.

| 💠 Dropbox Connection	⬤

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Filling Out an iForm

Creating an iForm

When you first log in to the application you will notice that the documents list is blank. The first step is to select an iForm template and create a new iForm. To start a new iForm open the 'start a new document' window by clicking the box/ pen icon and select a template from the list. Note that the iForm templates are loaded when you log in to naturalFORMS and are available for use when working offline.
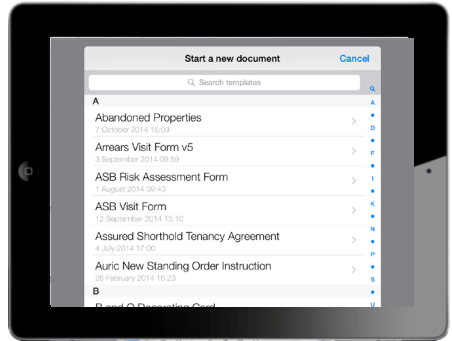
A name for the iForm is automatically generated. To change the name of this iForm, tap the field and enter a name, then tap Done.

Your new iForm automatically opens and is ready to fill out. You can access the Documents list when viewing an individual iForm by tapping the Documents button. You will see the form you have created now appears in the documents list.
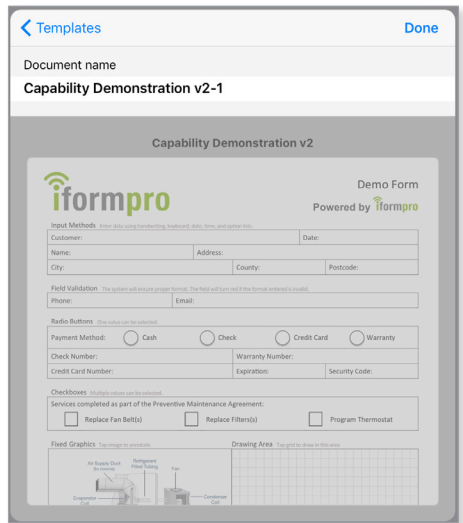
Inputting Information

The input methods are:

> Writing Input
> Keyboard Input
> Numbers Input

> Option List Input
> Date Picker Input
> Date Keypad Input

> Time Picker Input
> Signature Input
> Checkbox Input

> Radio Button Input

![iformpro logo]

Completing Fields on an iForm

1 Tap the Documents button at the top left of the screen to save the iForm and return to the documents list.

2 Fields outlined in red are mandatory fields. If a mandatory field has not been filled out, you will receive a warning to complete the field before submitting the iForm.

3 When you have finished filling out a field, select another field by tapping any field on the iForm or by using the arrow buttons in the input panel. When you advance to the next field on an iForm, the value in the current field is automatically verified.

4 Select a field and enter data via one of the input methods available. Here the input methods are Writing and Keyboard.

5 To change the value in a field, select the dustbin icon to erase the current input.

6 Input control area - You can easily and efficiently complete an iForm using different input methods for each iForm field.

7 Use the scroll button above the input box to scroll for more space to complete the field.

Writing Input

1 To fill out an iForm, begin by selecting a field and entering data via one of the input methods.

2 This example shows the First Name field filled out using Writing Input. Writing Input refers to cursive or printed writing using your finger or a stylus. iForm Pro instantly interprets the handwriting. Alternative spellings are shown and may be selected.

3 Select the Keyboard Input method via the buttons in the upper right of the input panel to correct the interpretation if needed. To insert a space when writing either use the Insert Space button or leave a gap between words. A space is indicated by a small trough in the dotted line.

4 Use the Backspace button to delete the previous character.

5 When you have finished filling out a field, select another field by tapping the field on the iForm or by using the arrow buttons.

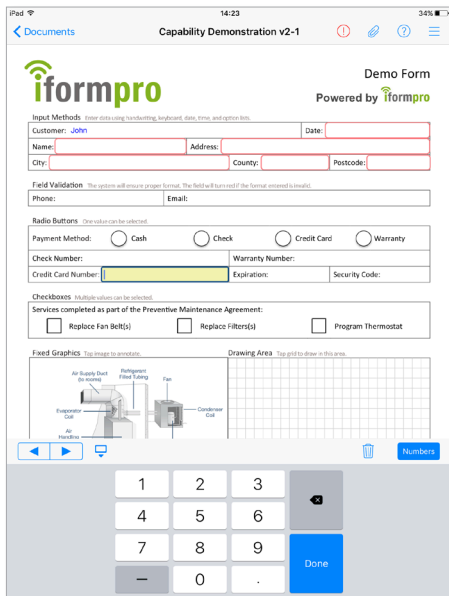When you advance to the next field, the value in the current field is considered verified. If you change your mind about a value in a field, simply tap the field to edits.

![iformpro logo]
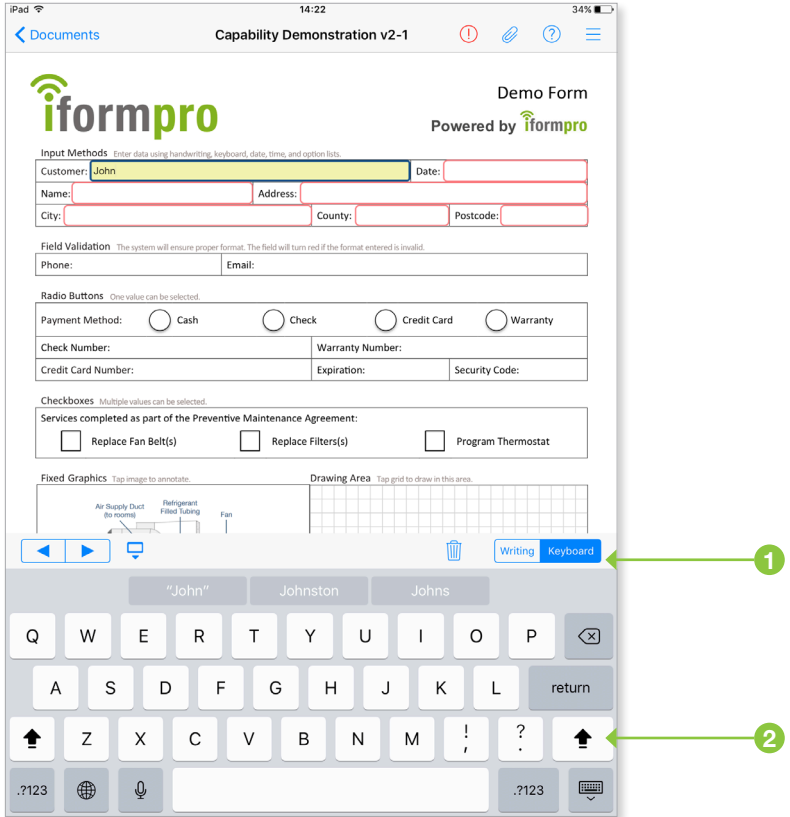
Keyboard Input

This example shows the Last Name field filled out using the Keyboard Input method. Keyboard Input refers to entering text using the standard keyboard on the e-device.

1 Select the Keyboard Input method to display the keyboard and enter information in the field.

Select another field by tapping that field directly or by using the arrow buttons.

When you have finished filling out a field, select another field by tapping the field on the iForm or by using the arrow buttons.

2 Double tap the SHIFT button to activate the Caps Lock function. When activated the SHIFT button icon will change and any text keyed will be in capital letter format.

Numbers Input

A numerical keyboard is displayed for fields requiring numerical input, for example the 'phone' field.

After entering information in the field, select another field by tapping the field directly or by using the arrow buttons.
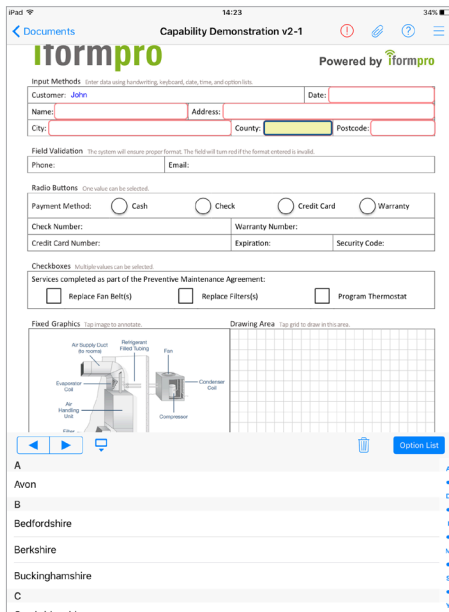
Option List Input

In fields using Option List Input, the accepted values for the field input have been predefined, and the field input is selected from a list of choices.

To complete a field with Option List Input, select one of the values from the list.

Select another field by tapping the field directly or by using the arrow buttons.

Date Picker Input

Date Picker Input is used to complete date fields.

To complete the field, tap Select for the current date or spin the picker with your finger until the correct date displays. You can select any past, current, or future date.

Select another field by tapping the field directly or by using the arrow buttons.
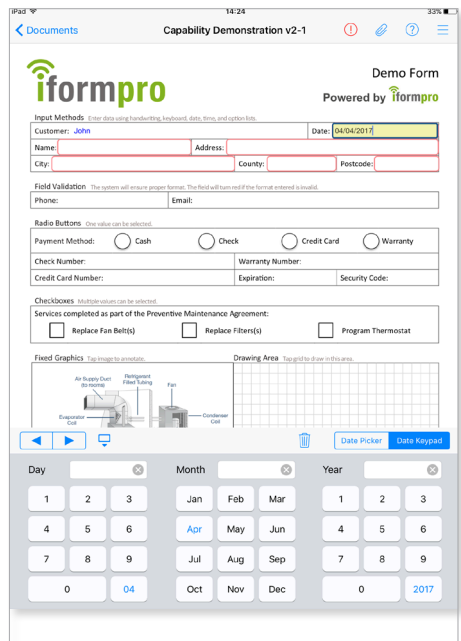

Date Keypad Input

Date Keypad Input is a second option for completing date fields.

To complete the field, select the day, month, and year from the keypad. You can select any past, current, or future date.

Select another field by tapping the field or by using the arrow buttons.
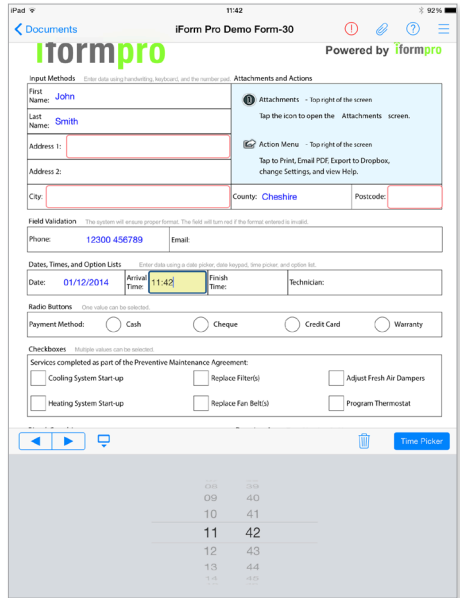
Time Picker Input

Time Picker Input is used to complete time fields.

To complete the field, tap Select for the current time or spin the picker with your finger until the correct time displays. You can select any past, current, or future time.

Select another field by tapping the field directly or by using the arrow buttons.
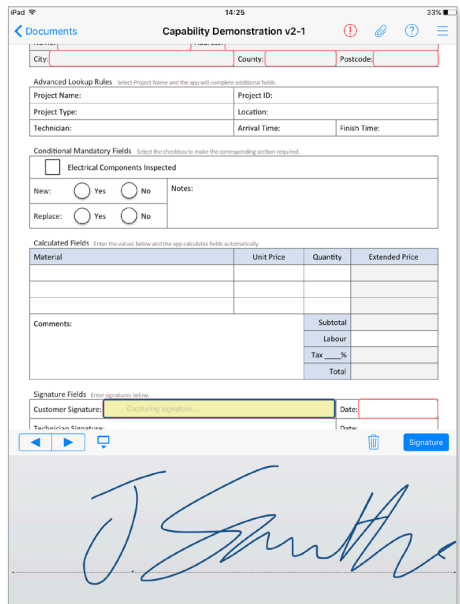

Signature Input

Signature Input is used to handwrite a signature in a field. Signature fields are not interpreted, meaning that the handwritten signature is preserved as the final input for the field.

To complete the field, sign your name in the field using your finger or a stylus.

Select another field by tapping the field directly or by using the arrow buttons.

Voice Dictation Input

Voice Dictation is another method of inputting data into a field. To use voice dictation make sure you enable dictation. To do this go to 'Settings' and 'General' then go to 'Keyboard'. Check if Enable Dictation is on and turn it on if it isn't.

Next make sure Siri is enabled, to do this go to 'General' and 'Siri' and make sure it is turned on.

To complete the field using Voice dictation tap the field and tap the voice dictation button then press done when finished inputting.

Select another field by tapping the field directly or by using the arrow buttons.
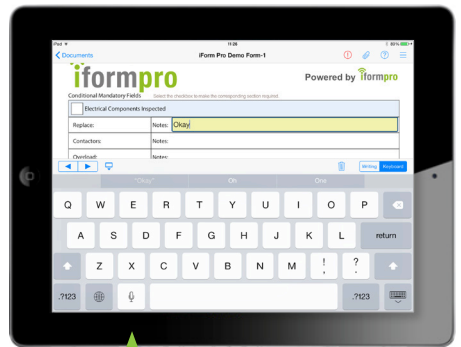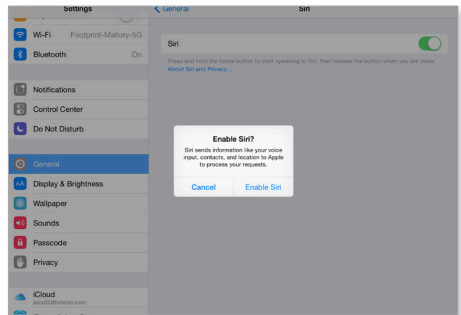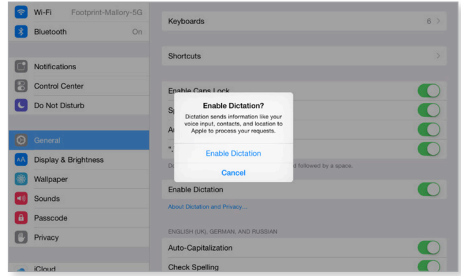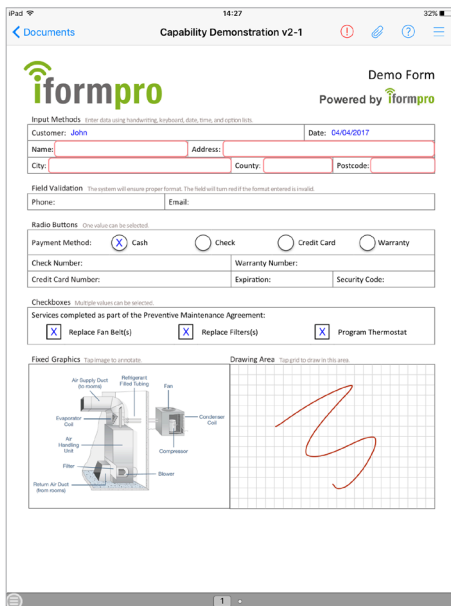
Radio Button and Checkbox Input

To complete radio button and checkbox fields on an iForm, select the appropriate radio button or checkbox option directly on the form. The input panel does not appear for radio buttons and checkboxes.

In this example, the user has indicated the payment method by tapping the Cash radio button, which places an "x" in the field. Only one radio button can be selected at one time. Selecting another radio button, such as Check, unselects the previously chosen option. To clear the radio button field, hold down your finger or stylus on the button and select clear.

In checkbox fields, more than one checkbox can be selected. To uncheck a checkbox, tap the box again.

Select another field by tapping the field directly.

Section 3

Additional iForm Field Features

Conditional Mandatory Fields

When completing an iForm, you may find that additional fields become mandatory as you complete checkbox or radio button fields. For example, consider a radio button field asking if electrical components have been inspected.

If you select this checkbox, the Replace, Contactors, Overload and Press Switch fields become mandatory so that you can indicate which electrical components have been inspected. If you had not checked the checkbox, the four additional fields would remain optional.
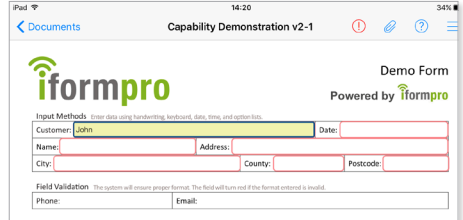
Calculated Fields

Your iForm may have fields which automatically calculate values in other fields. In this example, a price of 5.00 has been entered in the Unit Price field and a quantity of 4 has been entered into the Quantity field. The value of the Extended Price field is automatically calculated as 20.00. If you change the value in the Unit Price or the Quantity field, the value in the Extended Price field is recalculated automatically.

The value in the Subtotal field is automatically determined by adding the total of all values in the Extended Price fields. When you enter a tax of 5% in the Tax field, a tax is automatically determined. The value in the Total field is automatically determined by adding the Subtotal, Labour and Tax amounts together.

Navigation on an iForm

Multi-Page iForms

When working with multi-page iForms, you can quickly and easily navigate between pages using the navigator at the bottom of the screen, in addition to navigating between pages by swiping your finger or stylus on the screen.

To navigate between pages, tap the specific page markers to jump directly to a page. The number of gray dots equates to the number of pages on the iForm. Slide the page indicator along the page markers to view each page in order.
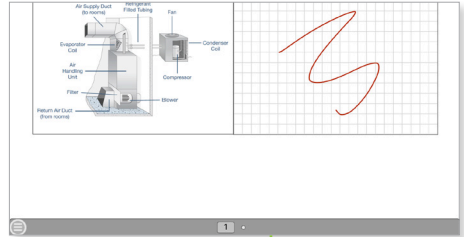
Direct Navigation to Fields

You can also select a field from a table of contents to navigate directly to the selected item. Tap the gray circle on the bottom left of the screen to open the table of contents.

Select a field name to navigate directly to the selected field in the form.

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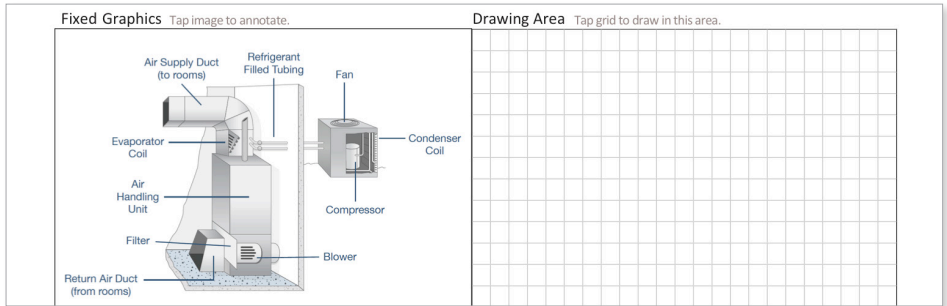## Adding Annotations and Drawings to iForms

Annotations and Drawings

iForm Pro supports annotations or drawings as field input. To add an annotation to an existing image or create a drawing, tap the appropriate field. The drawing panel appears.


This example shows an annotation to an existing image on the iForm. To begin annotating, select the pencil icon, and use your finger or a stylus to create the sketch.

When you have completed your annotation, select the X in the top left corner to return to the iForm.
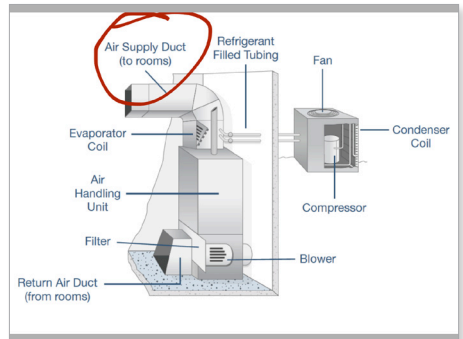

To edit the annotation, select the eraser icon. Use your finger or a stylus to erase. To erase the entire annotation, hold down the eraser icon and select Clear Page.
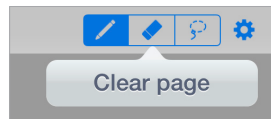
Annotations and Drawings Continued

To move strokes within the annotation, select the lasso icon. Use the lasso to grab and reposition a portion of the strokes. To select the entire annotation, hold down the lasso icon and choose Select All.
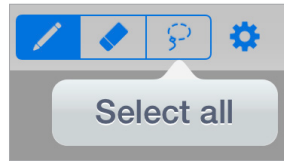
To adjust the width and colour of the annotation, tap the Settings icon in the top right corner. Select the width and colour to use in the annotation. You can also adjust the writing guard tab position based on whether you are right-handed or left-handed.
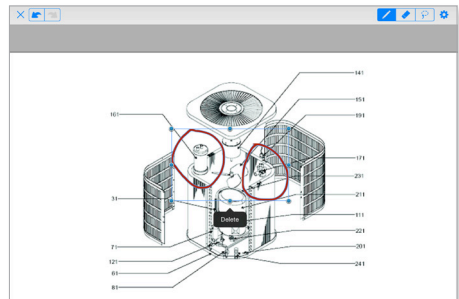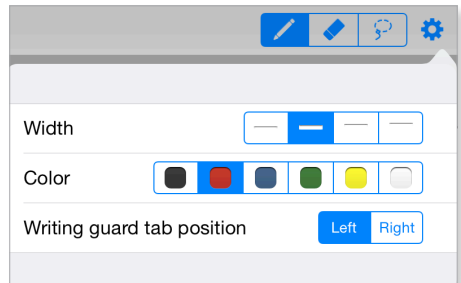
Adding Attachments to iForms

Photo, GPS location, and voice memo attachments are collected in the application and attached to iForms. To add attachments, tap the Paperclip icon to open the attachments screen.
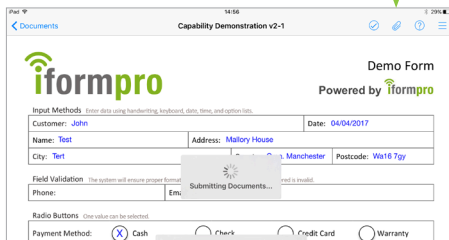
When you tap the Paperclip icon, the list of predefined photo, GPS location, and voice attachments for the iForm are displayed. If the icon for any of thise is red, then these attachments are mandatory and must be completed before the iForm is submitted.

Supplemental attachments enable additional photos, GPS locations, or voice memos to be included with the iForm as necessary. If an iForm is configured to allow supplemental attachments, there will be a + icon in the upper right corner of the attachments screen. There is no limit to the number of supplemental attachments which can be added. However, you may not be able to e-mail PDF files which are over a certain size due to the parameters of your e-mail server.

![iformpro logo]

Adding Attachments to an iForm

Tap the + icon to add a supplemental photo, GPS location, or voice memo. In this example, a photo will be added.

Enter a name for the photo. ——————▶

Once the supplemental photo has been added and the corresponding photo has been taken, the item appears in the attachments list.

Section 4

Photo Attachments

Photos can be taken from the tablet camera or selected from the existing photos on the e-device. Annotation can be added to photos as needed. The predefined and/or supplemental photo attachments which have bee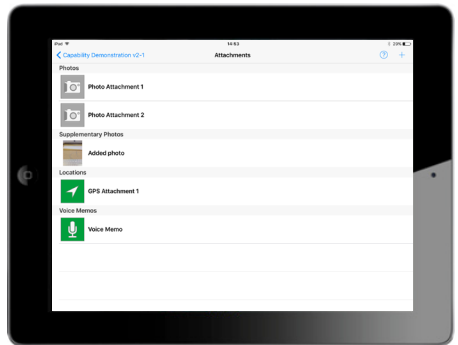n defined for the iForm appear in the photos list. To attach a photo, tap the row with the name of the photo attachment you wish to complete.

If your tablet has a camera, you can choose whether to select an existing photo or to take a new photo. The Take Photo option opens the e-device's camera for taking the photo. The Choose Existing option displays the camera roll for selecting a photo.

After the photo is taken, the photo appears in a preview screen. Select Use to attach the photo to the iForm. Select Retake to take a new photo.

We recommend using TinyPhoto application to take photos of a smaller size. Photos taken within the TinyPhoto application will appear in the camera roll and can then be attached to the iForm using the 'choose existing' photo option. Once you select a photo, the photo appears as a thumbnail image.

Tap a row to replace or annotate attached photos. To annotate a photo, select the photo's corresponding thumbnail image. The drawing panel will appear. For more information on using the drawing panel, refer to the Adding Annotations and Drawings to iForm section of this guide.

Once you have completed your annotation, the annotation indicator is displayed in the thumbnail image. The full annotation appears in the PDF file of the iForm.
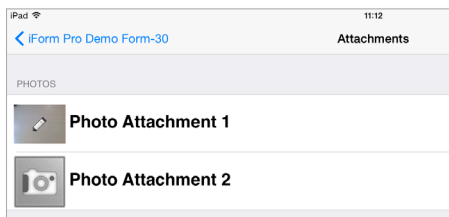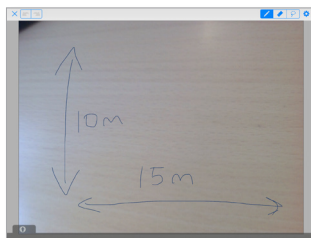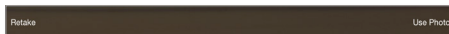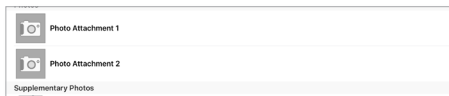
GPS Location Attachments

**GPS locations can be applied to the entire iForm or associated with an individual iForm field.**

Field-Specific GPS Location Attachments

If a field has been marked to collect a GPS location, naturalFORMS automatically captures the location when the field is filled out. In this example, a GPS location is included with the signature field. When the user signs the iForm, a GPS location is collected so that there is a record of where the signature occurred.

Signature:

Capturing signature...
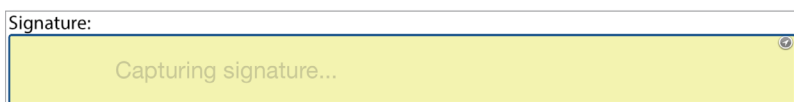
The arrow at the right of the field turns green to indicate that a GPS location has been attached to the field. If you change the input in a field with a captured GPS location, the GPS location automatically updates to capture the location of the field's most recent change.

LOCATIONS

GPS Attachment 1

GPS Attachment 2

The predefined and/or supplemental GPS locations which have been added to the iForm appear in the locations list. When a GPS location is selected, the Location Services feature on the tablet automatically records the GPS location and attaches the location to the iForm. When the location is captured, the icon next to the name of the location turns green.

LOCATIONS

GPS Attachment 1

Show Map

Recapture Location

GPS Attachment 2

Once a GPS location is captured, you can view a map of the location or recapture the location if needed. To view the map, tap the name of the location and select Show Map. To recapture the location, tap the name of the location and select Recapture Location.

Note: Location Services must be enabled in the tablet settings for GPS location capture to occur successfully.
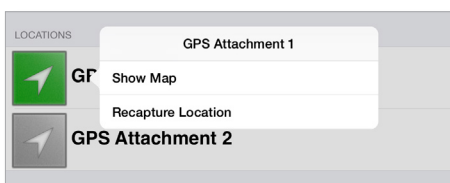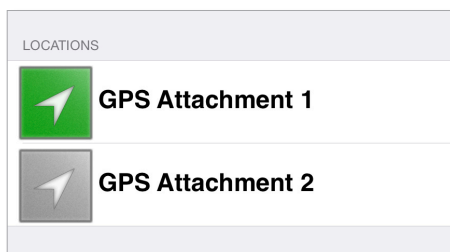
Voice Memo Attachments

Voice memos are captured on the tablet and are included in the output information in .m4a format. To add a voice memo to the iForm, select the appropriate voice memo from the attachments list.

To begin recording a voice memo, tap the red record button. The red light will light up and the timer will begin timing your recording.

Press the Stop button when you have finished recording. To listen to the recording, press the Play button. To save the recording as an attachment, select Done. To discard the recording, select Cancel.

When the voice memo is saved, the icon next to the name of the voice memo turns green.

You can choose Playback Voice Memo or Re-record Voice Memo once the attachment is captured. Tap the row of the attachment to display those options.

Section 4
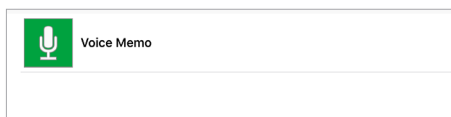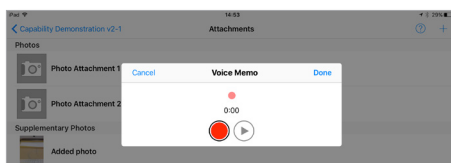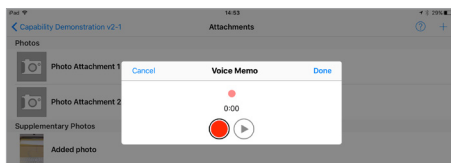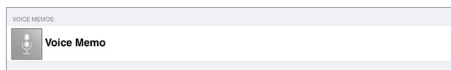
Clearing or Deleting Attachments

To clear or delete an attachment, perform a horizontal swipe across the row of the attachment from right to left. If the attachment is a predefined attachment, a Clear button appears. Selecting Clear removes the existing attachment, but leaves the row for the predefined attachment so a new photo, GPS location, or voice memo can be added.

If the attachment is supplemental, a Delete button appears. Selecting Delete removes the attachment as well as the row reserved for the attachment.

If you delete a photo attachment, note that unless the photo was chosen from the Camera Roll i.e. if the photo was taken within the naturalFORMS app, the photos will not remain on the e-device.

Note: If you delete the photos from the Camera Roll on the e-device, the photos will no longer be in the iForm.

![iformpro logo]
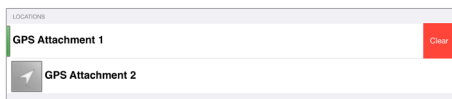
## Submitting and Managing iForms

Reviewing and Submitting an iForm

When you have completed an iForm, the next step is to review the form and decide whether to submit the iForm to the server or mark the iForm as closed for submitting at a later time. Tap the checkmark icon to view the results of the iForm review.

The checkmark icon at the top right of the screen will change colour depending on the status of the form, and its status updates automatically as you complete fields.
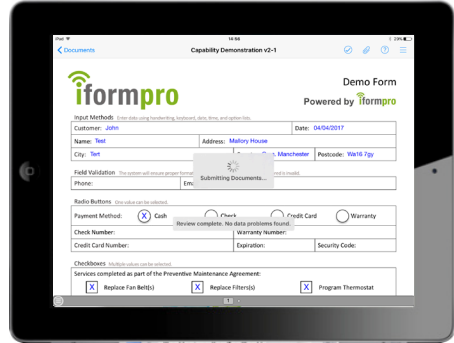
Review Status Codes

Indicates an error has been found. Errors must be resolved before the iForm can be closed or submitted.

Indicates that no errors have been found and the iForm is ready to close or submit.

In this example, review status is red because the mandatory address field has been left blank. Tap the error information to jump directly to the associated field, or tap Return to the form to open the iForm and correct the error.

The following data problems must be resolved before submitting this document:

Address 1: [Blank]
Value can not be blank.

Return to document

![iformpro logo]

Reviewing and Submitting an iForm

Once the address field is completed, the review status changes to a tick and the iForm is ready to close or submit.

Tap the tick icon to choose whether to Close or Submit the iForm. The Close option marks the iForm as ready to submit. This option is valuable if you do not have a network connection to submit the iForm, but want to track which iForms are ready to submit. The Submit option proceeds with submitting the iForm to the server.

When you select Submit, you will be prompted to enter your User ID and password to submit the iForm. Note: You must have a network connection to submit iForms to the server.

The iForm is assigned a unique sheet address upon first submission to the server and can be viewed in a web-based form viewing application. If you make changes to the iForm in the form viewing application, the changes do not transfer back to the e-device.
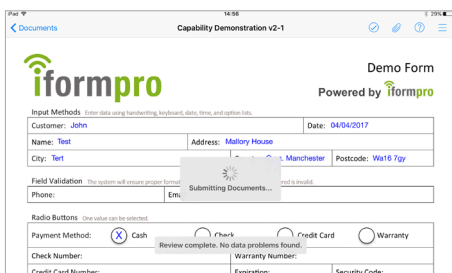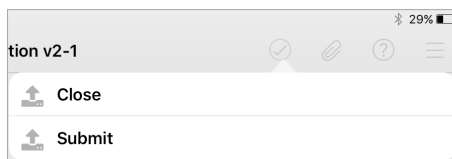
Managing iForms
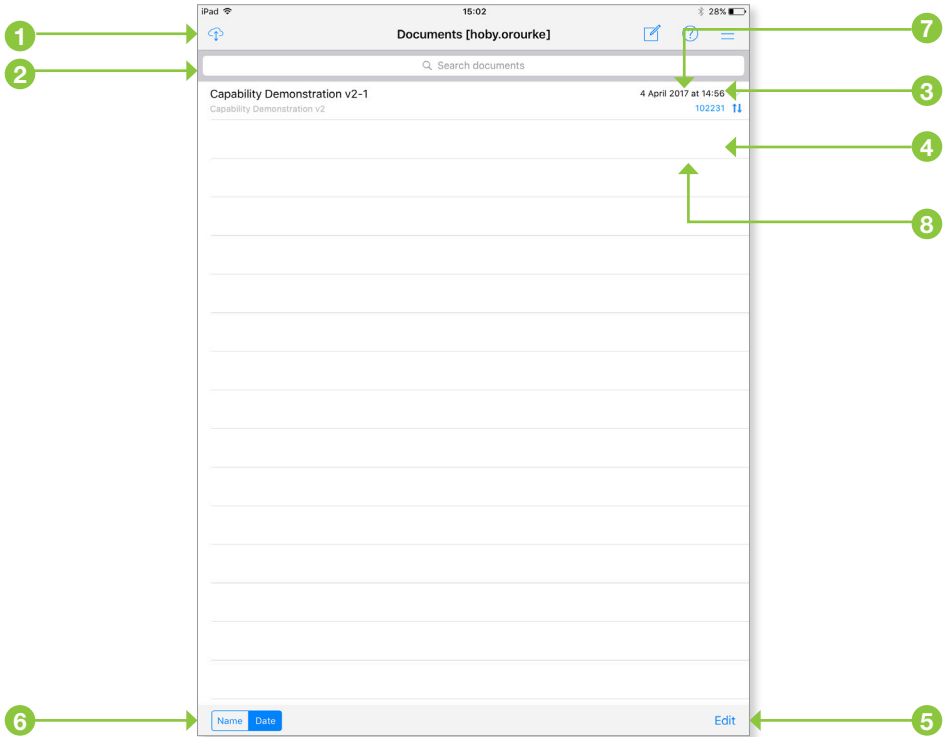
Go to the Documents page to view the list of iForms available for completion. The information displayed for each iForm is detailed below. Select an iForm and tap the appropriate row to open.

1 Resync button.

2 You can search for a specific iForm by entering all or part of an iForm name in the Search field.

3 A tick icon indicating completion status. If the checkmark is green, the iForm is closed.

4 Arrows indicating submission status. If the arrows are blue, the iForm is submitted.

5 Tap the Edit button in order to select and delete multiple iForms.

6 You can sort the list of iForms by Name or Date. Select the sort option at the bottom left of the screen. In this example, the list is sorted by Date.

7 Submission date to the EDW Server (or the last modification date if not submitted).

8 Submission ID.

Deleting iForms

To delete iForms, perform a horizontal swipe (from right to left) in the row of the iForm. To confirm, tap the red Delete button. This action deletes the iForm from the e-device; please remember to submit before you delete the iForm.

To delete multiple iForms at once, select the Edit button at the bottom right of the iForm screen.

When deleting multiple iForms, tap the Edit button on the bottom right of the screen. Then, tap the Select button to choose whether to select from all iForms or submitted iForms only.

To select iForms to delete, tap the row of the iForm. Selected iForms are marked with a red checkmark.

Tap the Delete button when you have finished making your selections.
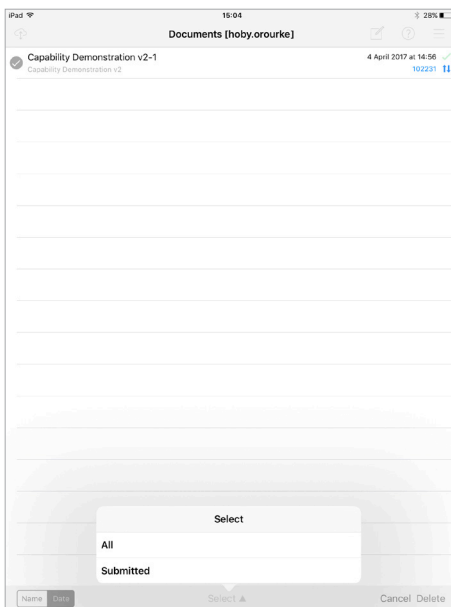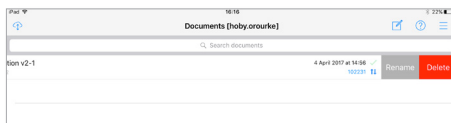
Resync for Updated iForm Definitions

To download updated iForm definitions from the server, tap the Resync button at the top left of the Documents screen. You must login to the server before the iForm definitions are downloaded.

If you are working online and have not downloaded updated iForm definitions in the past 24 hours, the application reminds you to login and resynchronize. If you are working offline, the application reminds you to login and resynchronize after one week.

Section 5
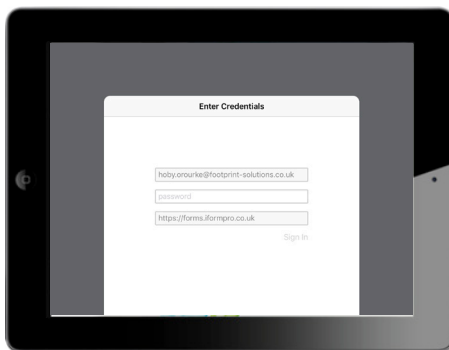
Printing an iForm

iForms can be printed directly from naturalFORMS. To print an iForm, open the form, go to the Tools menu which is the three lines at the top right of the screen, select Share, then press Print.

To print an iForm, it is recommended to have a printer which supports the AirPrint framework. Your tablet and AirPrint-compatible printer must be connected to the same local area network. Information on supported printers can be found in the following article: http://support.apple.com/kb/ht4356.

If you have a printer which does not support AirPrint, you need additional software for your PC or Mac to print iForms. These applications transmit the iForm to your PC or Mac as a PDF which you can print from your computer.

To obtain compatibility software, follow the links below:

- Compatibility Software for Mac:
  http://www.ecamm.com/mac/printopia/

- Compatibility Software for Mac and PC:
  http://www.collobos.com/

E-mailing an iForm

To e-mail an iForm, open the iForm. Go to the Tools menu, select Share, then Email PDF. The e-mail account on your tablet automatically opens and creates a new e-mail message. A PDF of the iForm is attached to the e-mail message. You can add recipients, a subject line, and text to the body of the e-mail message and send the message as you would any other e-mail.

Section 5
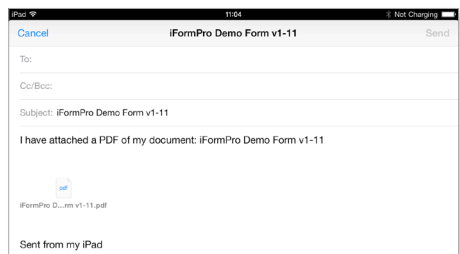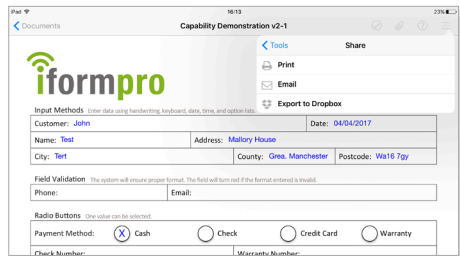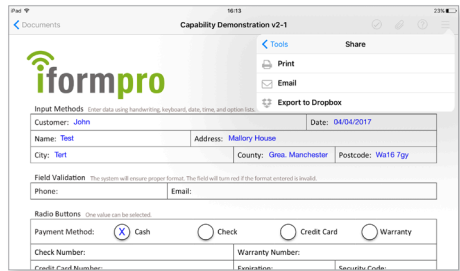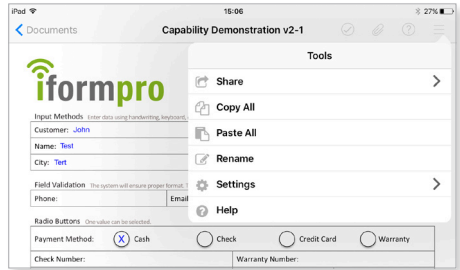
Copying and Pasting Between iForms

For easy and efficient completion of iForms, you have the option to copy all of the information in the iForm fields on one iForm, and paste the information into a new iForm.

To do so, select the Copy All option from the Action menu.

Return to the Documents screen and create a new iForm.

Go to the Action menu and select Paste All to paste the text from the previous iForm into the new one. Once the information is pasted, you can edit and complete fields on the new iForm as you would normally.

Note: Modifications to the original iForm do not automatically update on the new iForm.