



Alloc8 User Guide

# Forms

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# Forms

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## Overview

Eliminate manual paperwork and automate process with the introduction of Custom Forms. Create customised forms and attach these to jobs for your field workers to complete on their device.

## How Forms work in Alloc8

Form templates are created on the web app and applied to branches, companies, vehicles, assets. When creating a job, forms that have been applied at these levels will automatically be applied to that job. Forms can also be uploaded to individual jobs.

When a form is completed on mobile it is saved as a form entry. A form entry is always associated with a job and may only be completed for jobs they are attached to. However, field workers can add multiple form entries for non-required forms.

A timesheet can not be submitted if there are required forms on a job that are incomplete.

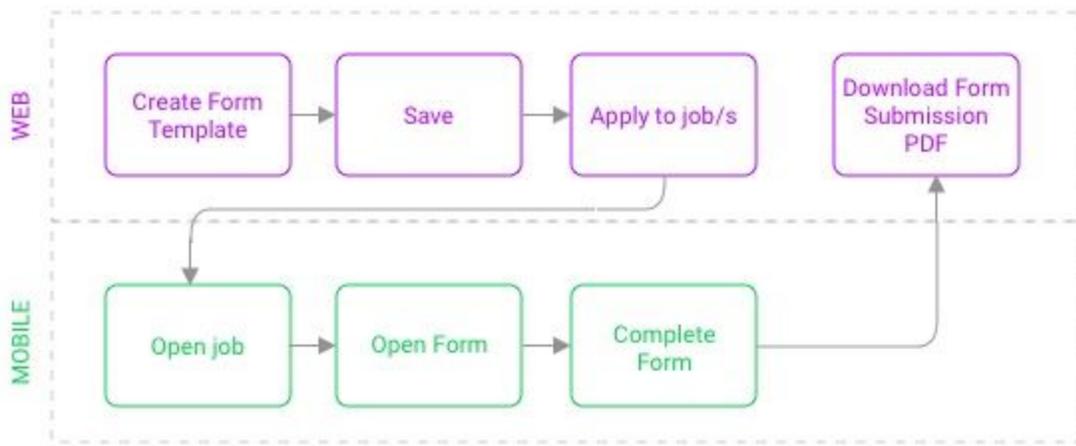
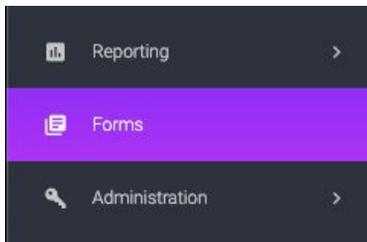


Figure 1: Basic Form Workflow between Web and Mobile

## Form Templates Page



All your form templates can be viewed and created from the new **Forms** menu item in the sidebar on the web app.

This page displays all of your form templates with the following columns:

1. **Name**
2. **Type**
3. **Applied to**
4. **Bundle with Paperwork?**
5. **Last Updated**
6. **Status**
7. **Actions (Edit/Delete)**

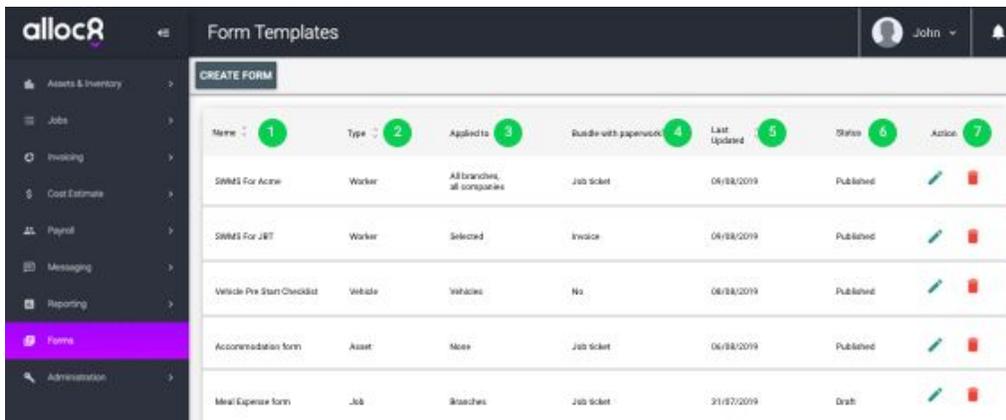
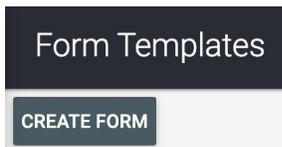


Fig 1. Form Template page

## Creating a form

### Create Form

From the Form Templates page, select 'Create Form'



### Form Settings

A pop up will display where you will then need to define how the form will need to be used:

**Create Form** ✕

**Form Setup**

Set up how you want your form to be used. You can change these settings at any time after this step by going to Edit Form > Form Settings.

Form name \*

What does this form relate to? \*

Where do you want to apply this to?

**Form settings**

This is a required form

Allow multiple form submissions

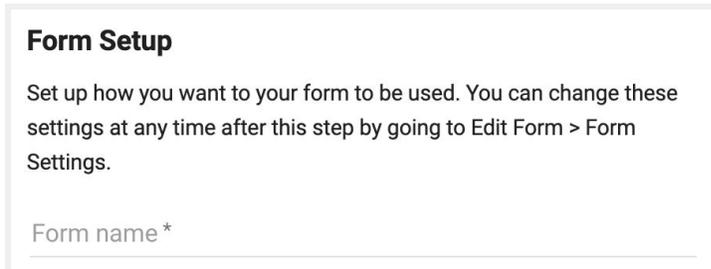
Include in paperwork

1. Form Name
2. Type of form
3. Apply to
4. Additional settings

Fig 2. Form Settings Pop Up

## 1. Form Name

Give your form a unique name. This will be visible as the form name on mobile that your field workers will see.



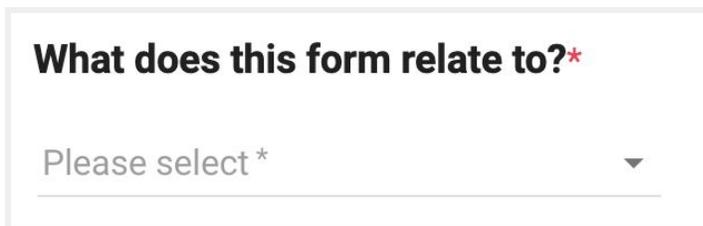
**Form Setup**

Set up how you want your form to be used. You can change these settings at any time after this step by going to Edit Form > Form Settings.

Form name \*

Fig 3. Form Settings Pop Up

## 2. Form Type



**What does this form relate to?\***

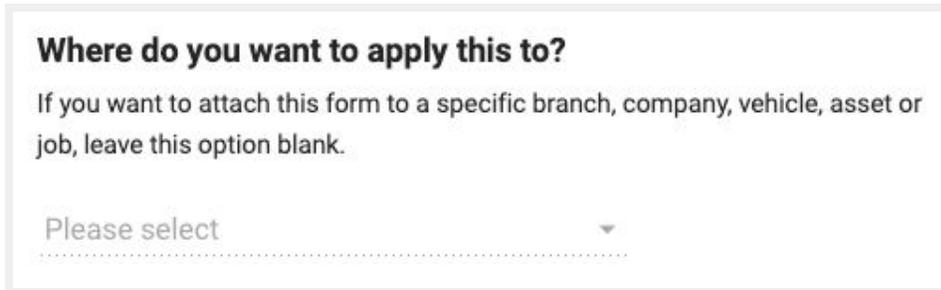
Please select \*

Fig 4. Form Settings Pop Up

This is the *type* of form. There are four different types and depending on what is selected will have different rules for when and how they appear on jobs.

Type	Definition
Worker	Forms that are specific to the workers on that particular job. These forms will only appear on a job once that vehicle type is resourced to that job
Vehicle	Forms that are specific to the Vehicle type on a job. These forms will only appear on a job once that vehicle type is resourced to that job
Asset	Forms that are specific to the Asset type on a job. These forms will only appear on a job once that asset type is resourced to that job
Job	Miscellaneous forms that need to be included on jobs

### 3. Apply To



**Where do you want to apply this to?**

If you want to attach this form to a specific branch, company, vehicle, asset or job, leave this option blank.

Please select ▼

Fig 5. Form Settings Pop Up

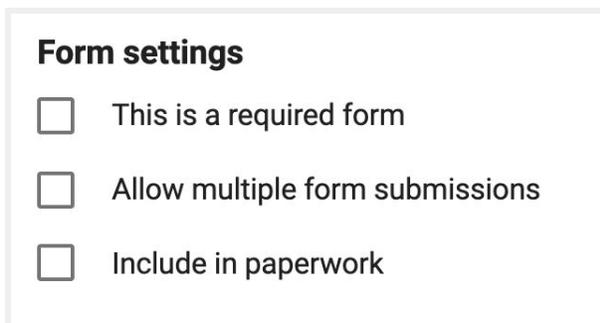
Here you can select where you want to apply this form to:

**All Branches** This will add the form to all branches, and when applicable will appear on jobs for that branch

**All Companies** This will add the form to all companies, and when applicable will appear on jobs for that company

If you want to add a form to an individual Branch, Company, Vehicle, Asset or Job, then do not select anything in this field. You will be able to manually add the form to these areas after you create it.

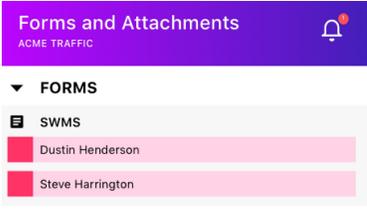
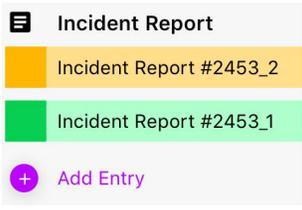
### 4. Additional Settings



**Form settings**

- This is a required form
- Allow multiple form submissions
- Include in paperwork

Fig 6. Form Settings Pop Up

Setting	Description	
<b>This is a required form</b>	This box will automatically create a form entry in mobile when applied to jobs. If it is a worker, vehicle, or asset form, one entry will be created for each.	
<b>Allow multiple form submissions</b>	Instead of an entry being created for a form on mobile, an 'Add entry' button will be displayed.	
<b>Include in Paperwork</b>	This will include the form submissions in paperwork that gets sent to the site contact and accounts.	

**Note:** You cannot have required forms with multiple form submissions.

**Form settings**

- This is a required form
- Allow multiple form submissions

**Form settings**

- This is a required form
- Allow multiple form submissions

Once you have created your form you'll be directed to the form builder.

1. **Form Settings** Update the form settings you set when creating the form
2. **Form Tabs** Allow you to switch between different views of the form
3. **Form Builder Toolbar** Drag and drop fields onto the canvas
4. **Status and Last Updated** This shows whether the form is published or in Draft state, and the date the form was last updated
5. **Publish and Save Buttons** Draft forms will show a Publish button, while already published buttons will only show the Save button

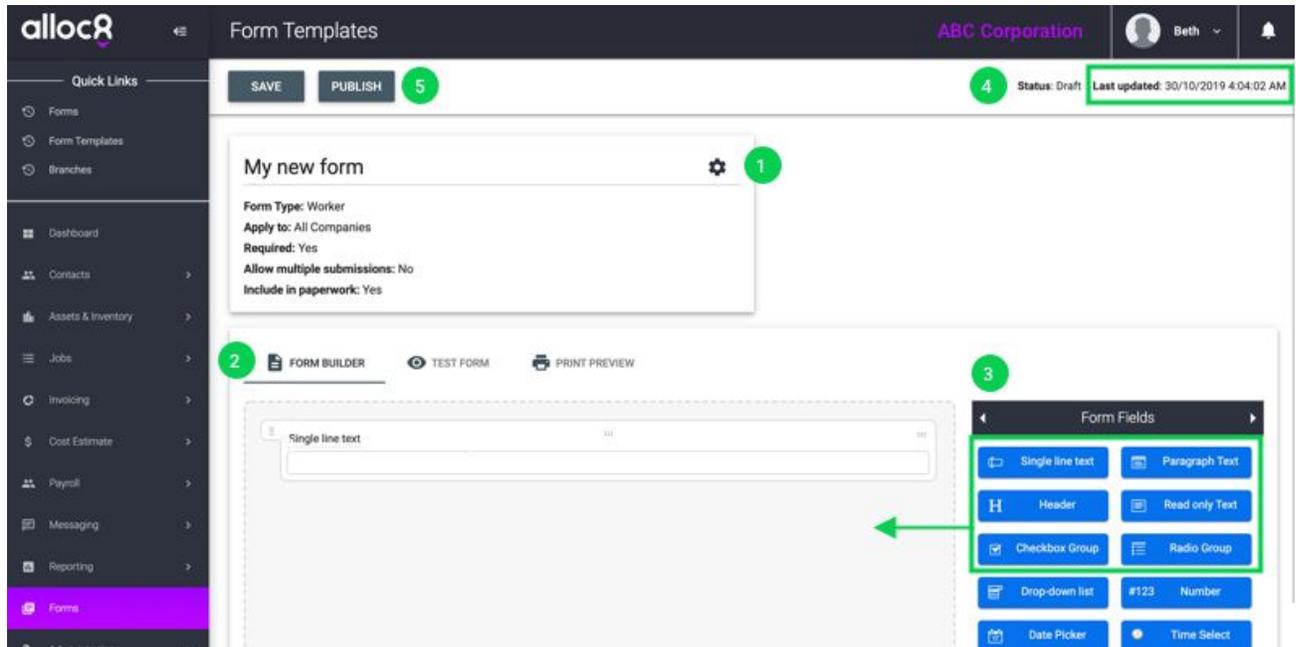


Fig 7. Create Form Page

# Using the Form builder

There are a number of fields available in the form builder that you can use to create your form:

## Standard elements



### Single line text

User can enter single line text input

### Paragraph text

User can enter multi-line text input

### Header

Create a heading on your form

### Read only text

Create read only text on your form

### Checkbox group

User can tick multiple options

### Radio group

User can choose an option from a list of radio buttons

### Drop-down list

User can pick from a drop down list

### Number

An input field that accepts numbers only

### Date picker

User can choose a date

### Time select

User can select a time

### Draw or sign

Draw or sign on a blank canvas

### Vehicle canvas

Draw on a vehicle canvas

### Upload file

User can upload an image from their device

Fig 8. Form Builder elements

## Editing elements

Simply drag and drop the form builder elements onto the canvas.

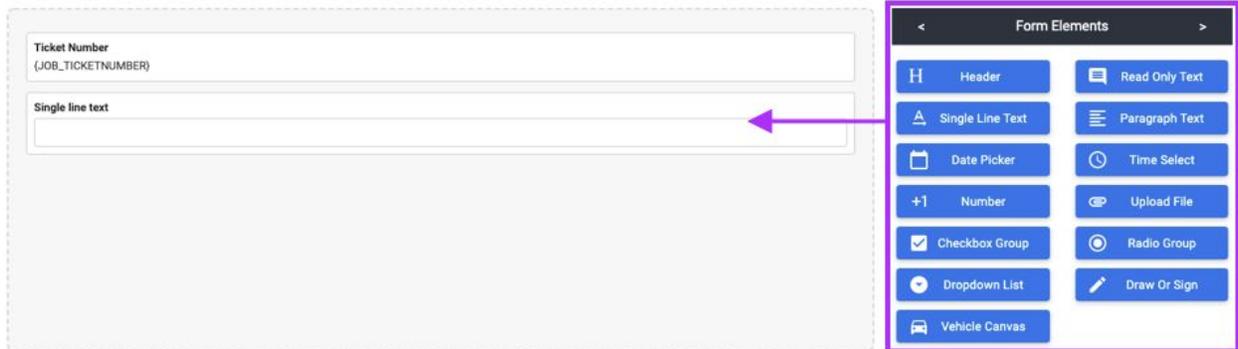


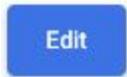
Fig 9. Form Builder canvas

Click on the field label name to edit the text

Hover over an element to see the editing options



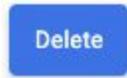
Fig 10. Edit form element



Control required settings, or options for multi-option elements



Clone element



Delete Element

## Required fields

The Edit button will show a checkbox where you can mark a field as required.



Fig 11. Edit form elements - Required Fields

## Options

For fields with multiple options (Checkbox group, Radio buttons and Drop Down list), the edit button will also display a second tab called 'Options'.

Fig 12. Edit form elements - Options

To add more options:

1. Click 'Add Option'
2. Enter the values you want the user to choose from in the **right hand column**
3. For any new options, you will also need to enter a unique key in the **left hand column**. This is not shown to anyone filling out the form, so we recommend following the sequence of the keys automatically generated above, ie. 'checkbox-3'
4. Click SAVE

## System Fields

System fields are automatically filled on your worker's device based on the worker, vehicle, asset or job that form entry belongs to.

When you create a form, a System Field called 'Job Ticket Number' will appear on the form builder canvas. This will auto-populate with the related job number for the form submission, hence it cannot be removed when building a form.

Fig 13. System fields displayed in mobile

To see all available system fields, click on the Arrows in the Form Builder toolbar to display system fields.



Depending on your form type, there will be a range of system fields you can add:

Worker fields	Vehicle fields	Asset fields	Job fields
Available on Worker forms	Available on Vehicle forms	Available on Asset forms	Available on all forms
Worker Name Shift Type	Registration Number Description Operator Name	Asset Description	Ticket Number Branch Job Location Job Start Date Timesheet Manager Client Company Site Contact

**Note:** System fields are not editable in the form builder

## Repositioning elements and creating columns

You can drag and drop elements to reorder, or drag into each other to create columns.

Note: Columns will only show on the Print PDF version, not when the form renders on mobile or tablet. When viewing the form on a mobile or tablet, columns will be stacked, with the left element above the right element

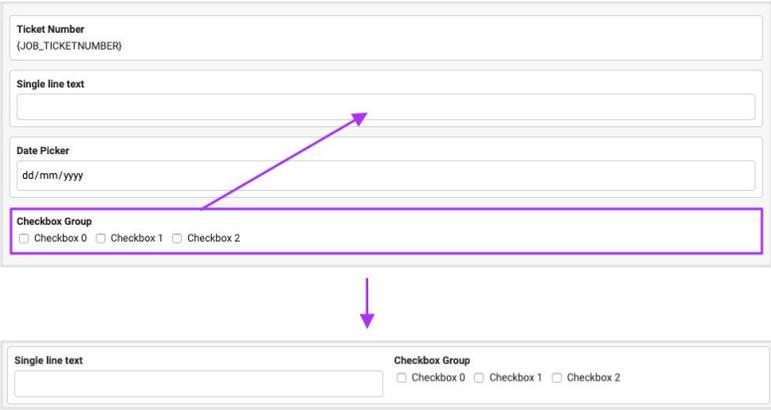
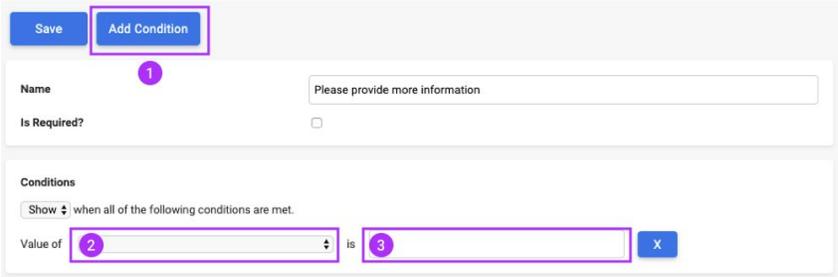


Fig 14. Repositioning fields on the form builder

### Conditional Fields

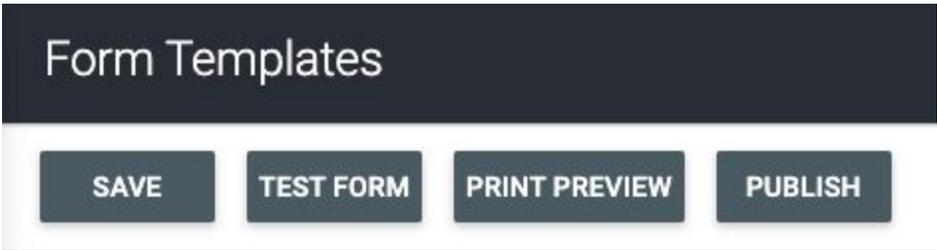
If you have elements with options on your form, you can create conditions to show a new field based on one or more options that the user has selected in the form.

1. Click Edit on the new field you want to show, then click 'Add Condition'
2. Select which element to load options from. This list will only show any existing elements that contain options on your form, such as Checkbox, Radio and Drop Down fields.
3. After you have selected your element, the Right hand drop down will load the options for this field. Choose an option, and also specify if you want to SHOW or HIDE the new element based on this selection.



Once you have added all your conditions, click SAVE and then Test Form.

### Previewing, testing and publishing your form



## Test Form

When you have finished building your form, you can click on 'Test Form' tab to preview all your form elements and test the fields on your form, including conditional fields.

## Print Preview

Clicking the Print Preview button will show you how the form will print or download as a PDF once submitted.

## Save and Publish

You can save your form at any time by clicking the 'Save' button.

Forms that are still in draft state will also show the Publish button.

Once you have published a form, you can only save it again - it cannot be moved back to Draft state.

Publishing and saving the form will update the 'Last Updated' status in the right hand side of the page header and on the Form Templates page.

**Status: Published   Last updated: 16/03/2020 11:33:56 PM UTC**

Fig 19. Date and Timestamp

## Editing a form

You can edit a form at any time by clicking the pencil icon in the Actions column on the Form Templates page.

Demo Form	Worker	No	18/03/2020 11:47:45 AM UTC	Draft	 
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Fig 20. Edit Form (Form Templates page)

## Changing the form name

You can rename a form by clicking on the same Settings icon  next to the form title. However, you cannot change the type of form or application settings for a published form.

## Editing form fields

You can edit all fields and conditions on the form builder in the same way you did when creating a form. When you have finished editing, click SAVE.

SAVE

### What happens to forms that have already been applied to jobs?

Forms that are already applied to jobs in Alloc8 will display the following dialog after pressing SAVE.

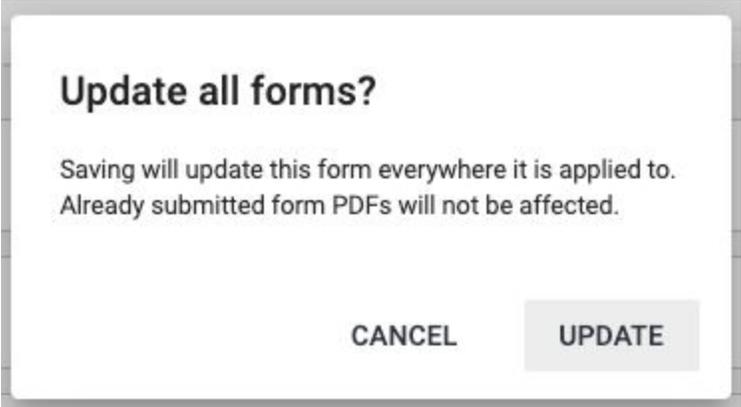


Fig 21. Dialog for editing a form that is already applied to a job

### How edited forms work on mobile

Each time a form is opened on mobile, the app will check for the latest version of the form template.

#### Draft form entries

If a form has been saved as a draft by a worker, upon returning to the form, the worker will see an 'Outdated Template' banner on their form when they go back in to complete it. They can click 'Refresh' to load the new form. If they do not refresh, upon clicking 'Save Draft' or 'Complete', they will also see a dialog to refresh the template. They will not be able to complete a form or save the draft again without refreshing the template.

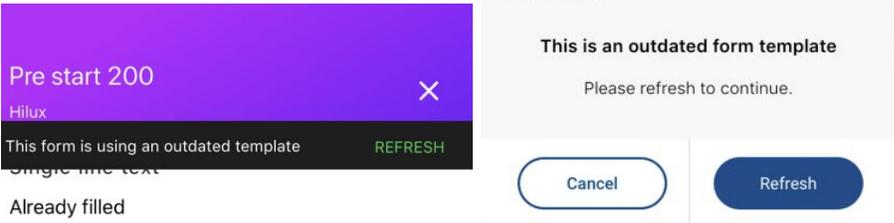


Fig 22. Outdated form banner and dialog on mobile

## Completed form entries

If workers have already completed and submitted the form you have edited, existing form PDFs will not be affected. However, if they open the completed entry on mobile, they will also see the 'Outdated Banner'. If they make changes and click 'Complete', they will also see the 'Refresh' dialog. Clicking 'Refresh' will mean they need to complete any new required fields and resubmit.

They can, however, choose to exit without having to refresh. Their existing submission will be unchanged.

## Refreshing a form template

When the user refreshes the form, any fields with an input will remain untouched, unless that field has been removed when the form was edited. Any new fields added will show, as well as any fields that have been marked as required will contain a 'required' asterisk.

If they are completing the form for the first time and, while they are doing so, the form is edited, upon clicking 'Save' they will see the outdated template dialog.

They will need to refresh to submit the form or save it as a draft. In this case, any fields they have entered will be cleared.

## Where can I attach my form?

You can attach forms to all branches, all companies, all vehicles or all assets. However, if you want to choose specific branches, companies, vehicles, assets or jobs to attach your forms to, you can also do so.

## Adding a form

To add a form, go to the branch, company, vehicle or asset, and click 'Edit'. Scroll down to Forms. You will see any forms that have already been linked to the branch here. This includes forms that have 'All Branches' applied.

You can use the search column to find your new form and add it.

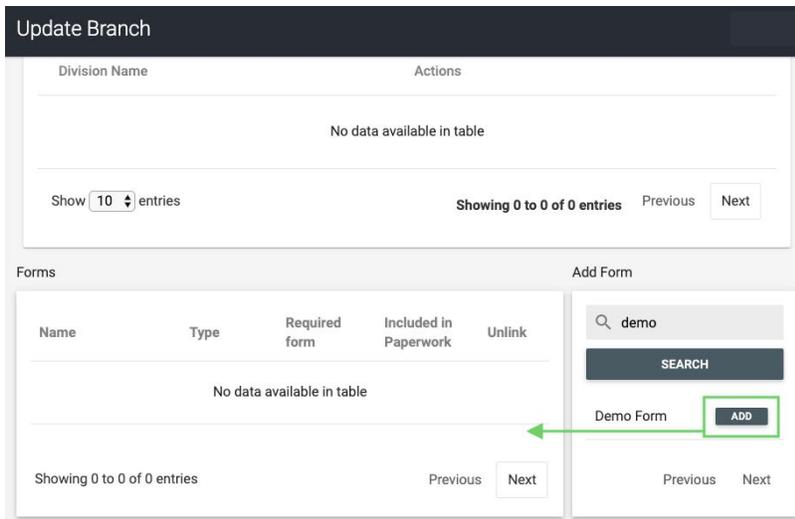


Fig 23. Forms and Attachments section

## Manage forms

You can also unlink a form from a branch (this does not delete the form), set it to be required for that particular branch, or choose to include it in paperwork.

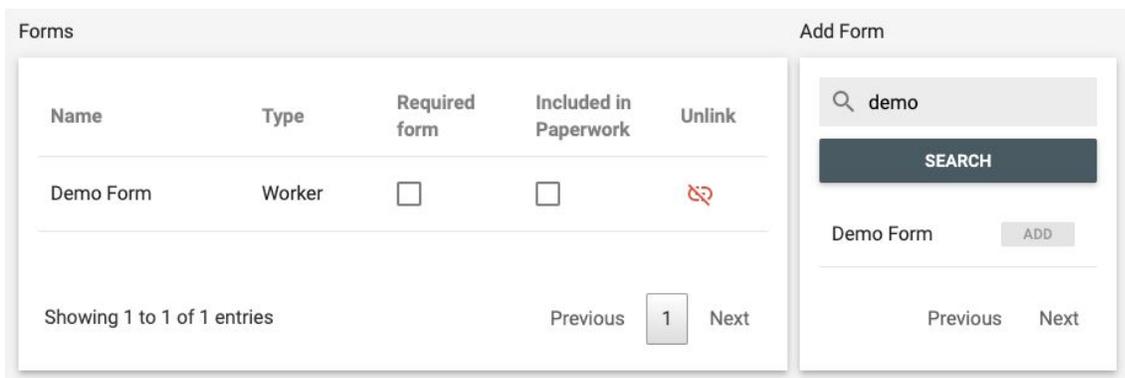


Fig 24. Manage forms

## Managing forms on jobs

When you have updated and published your form, you can add it to a job manually, or if it has been applied to 'All Branches' or 'All Companies', you will see your new form when you create a job.

After creating a job, the 'Forms and Attachments' button will be visible from the following areas:

### 1. 'Forms and Attachments' button

This button is visible in the top menu on any pages related to that job:

- Allocate Resource
- Timesheet
- Edit Job Ticket

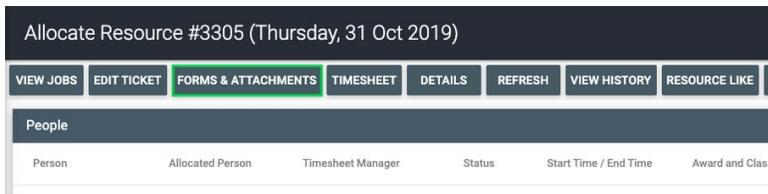


Fig 20. Forms and Attachments button will be visible on all pages related to that job

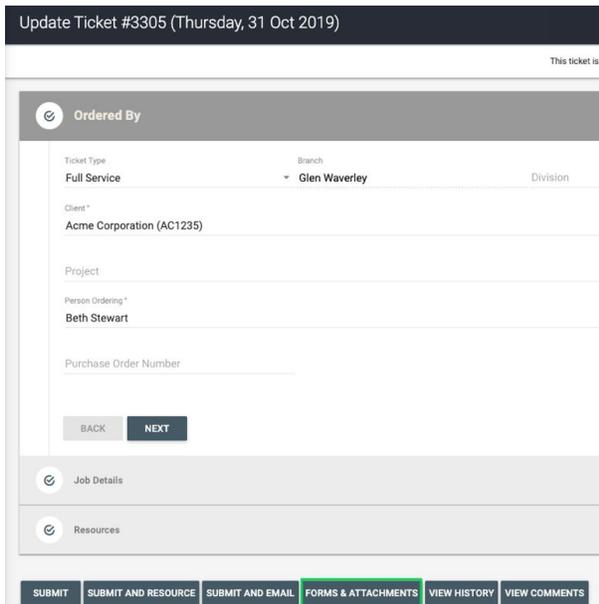


Fig 21. Forms and Attachments button will be visible after you create and submit a job

## 2. Icon on Whiteboard

This button is visible in the toolbar on each job card on the Whiteboard

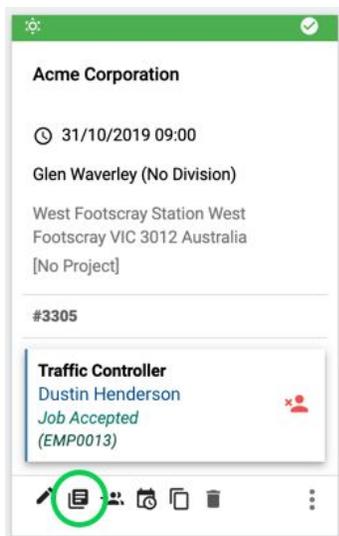


Fig 22. Icon on whiteboard

## Forms and Attachments page

This page will display attachments (refer to *Document Management* feature documentation), and all forms for that job.

The Forms section will display the following information

1. **Form Template Name**  
This is the name you gave your form when creating it
2. **Form Type**  
The type of form this is. Vehicle and Asset forms will only show if that Vehicle Type or Asset Type is resourced to the job (refer to Inheritance Rules table in the next section)
3. **Required Form\***  
This is a mandatory form. Timesheet Manager cannot complete a Timesheet until the form is completed. You will be able to override whether a form is required at the job level in the next update.
4. **Include in Paperwork?\***  
This is whether a form is included in the Paperwork bundle or not. Again, you will be able to override this at the job level in the next update.
5. **Unlink**  
This removes a form from the job but does not affect the form template or where it may be attached at the root level
6. **Add form**  
Add a published form template to the job

1 Name	2 Type	3 Required form?	4 Included in paperwork?	5 Unlink
Worker Form Test	Worker	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Beth Form	Job	<input type="checkbox"/>	<input type="checkbox"/>	
Beth Vehicle Form	Ute with AB	<input type="checkbox"/>	<input type="checkbox"/>	
Daily Vehicle Inspection	Ute with AB	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Data Collection Forms	Job	<input type="checkbox"/>	<input type="checkbox"/>	

Showing 11 to 15 of 25 entries

Previous 1 2 3 4 5 Next

Add Form

6 Search form name

SEARCH

Fig 23. Icon on whiteboard

## Inherited forms

If a form is applied elsewhere, it will show in this section based on the form settings, the job requirements or where you have attached it to.

Applied to	Condition		Inheritance Rule
All Branches	Has the form been unlinked on the individual Branch?	Yes	Form will not display
		No	Form will display
All Companies	Has the form been unlinked on the individual Company?	Yes	Form will not display
		No	Form will display
Individual Branch	Is the job for this Branch?	Yes	Form will display
Individual Company	Is the job for this Company?	Yes	Form will display
Individual Vehicle type	Is this Vehicle type resourced to the job?	Yes	Form will display
Individual Asset type	Is this Asset type resourced to the job?	Yes	Form will display

### Add a new form

Ass with branches, companies, vehicles and assets, you can search for your new form by title and add it here. You can only add forms that have been published.

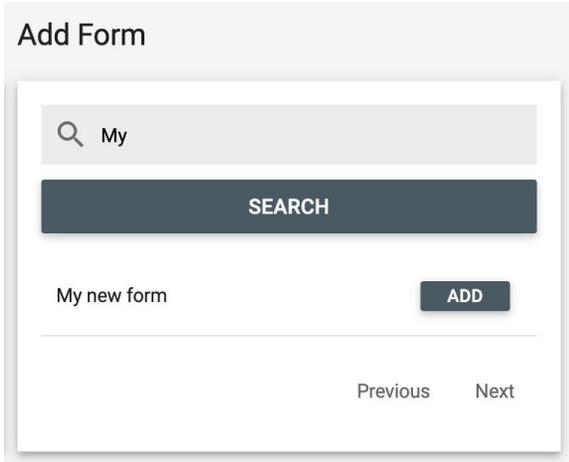
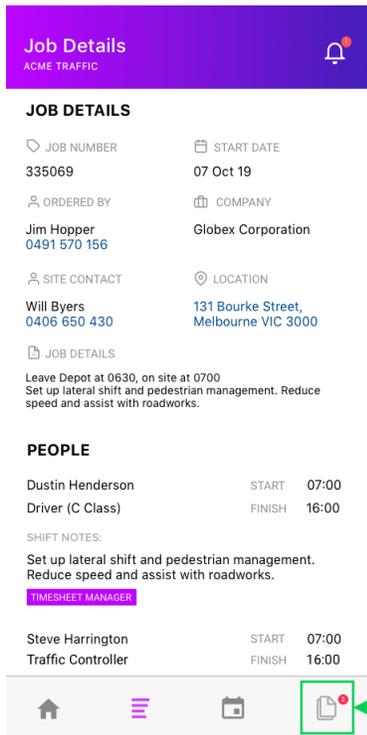


Fig 24. Add new form

## Completing forms on mobile



When your workers are viewing their jobs, all forms can be found on the Forms and Attachments tab from the Job Details menu.

If there are required forms that are incomplete, a badge counter with the number of forms will appear next to the Forms icon. The job will also appear as an action item on the dashboard:

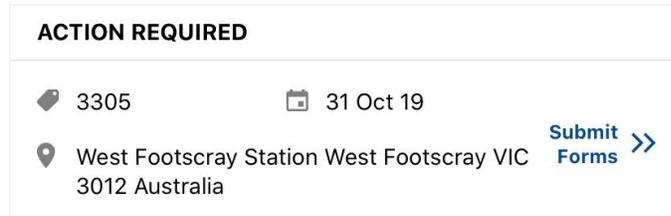
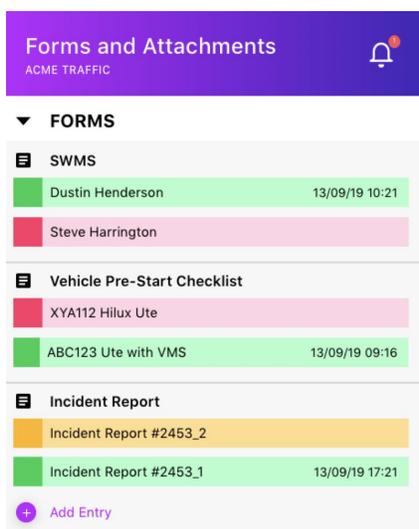


Fig 25. Forms and Attachments Tab on mobile

## Forms and Attachments tab



The Forms and Attachments tab will display all forms available for a job. Forms that are required will show first, and then other forms will be displayed in alphabetical order underneath.

Form entries are colour coded:

- Red** Required forms that are incomplete
- Orange** Non-required forms that are incomplete
- Green** All completed form entries

Fig 26. Forms entries on mobile

## Required, non-required and completed forms

SWMS	
Dustin Henderson	13/09/19 10:21
Steve Harrington	

Vehicle Pre-Start Checklist	
XYA112 Hilux Ute	
ABC123 Ute with VMS	13/09/19 09:16

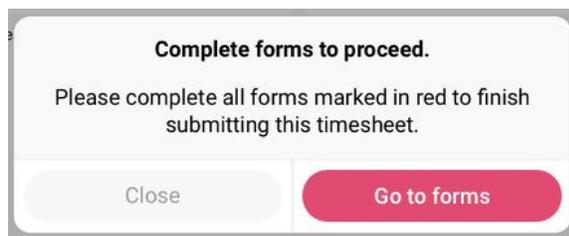
### Required forms

An entry will be created for each worker, vehicle or asset type that is resourced on the job.

*Example:*

If there are 5 workers, the form will create 5 entries with each worker's name in the entry.

All 5 must be completed.



Incomplete required forms will prevent a Timesheet from being completed. Upon signing and submitting the Timesheet, the Timesheet Manager will see a dialog if there are incomplete forms. Once all forms are completed, they can go ahead and submit the Timesheet.

Incident Report	
Incident Report #2453_2	
Incident Report #2453_1	13/09/19 17:21
<a href="#">+ Add Entry</a>	

### Non-required forms

An entry will be created for each worker, vehicle or asset type that is resourced on the job.

*Example:*

An incident report form of *form type: job* is attached to all branches and subsequently appears on all jobs. An incident occurs for a worker on the way home from a job, and the Timesheet has already been submitted. The worker can click 'add entry' at any point and record the new incident.

SWMS	
Dustin Henderson	13/09/19 10:21
Steve Harrington	

Vehicle Pre-Start Checklist	
XYA112 Hilux Ute	
ABC123 Ute with VMS	13/09/19 09:16

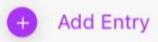
### Completed forms

All form entries that have been completed will appear in green. If the form is required, the worker can continue to edit and resubmit a completed form entry up until the Timesheet is submitted.

Non required form entries can be added and edited up until the job is locked (invoiced).

## Completing a form

A worker can click on a required form entry or (for non required forms) click the purple

 button to start a new form.

If the form is a 'worker' form, the user will see a list of everyone on that job, and will be prompted to choose which worker the new form entry is for. The same applies to vehicle and asset forms.

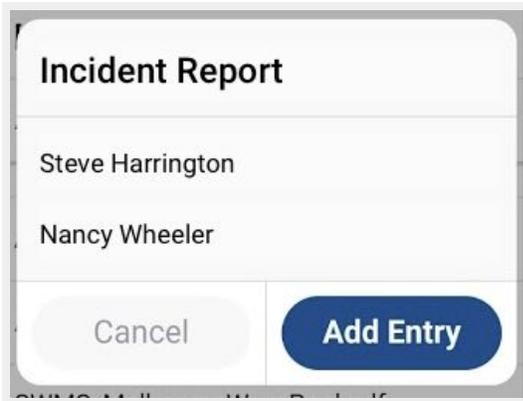


Fig 27. Non required worker, vehicle or asset forms will prompt the user to select who or what the new form entry is for.

This will open the form. The worker can then fill in the fields and click 'Save Draft' to finish completing it later, or 'Complete'. The Complete button will only become active once all required fields are completed.

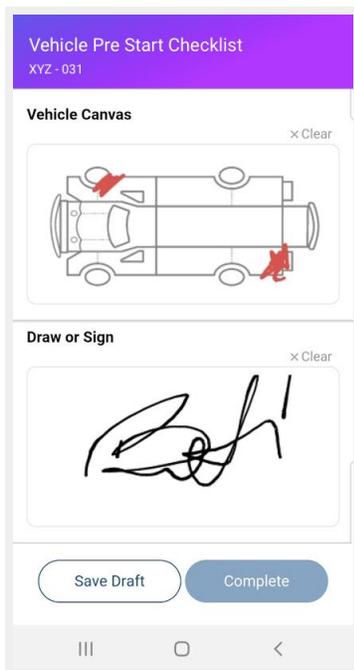


Fig 28. Save Draft / Complete

# Accessing form submissions on web

When a form is submitted, it will appear in the Forms and Attachments section of the job.

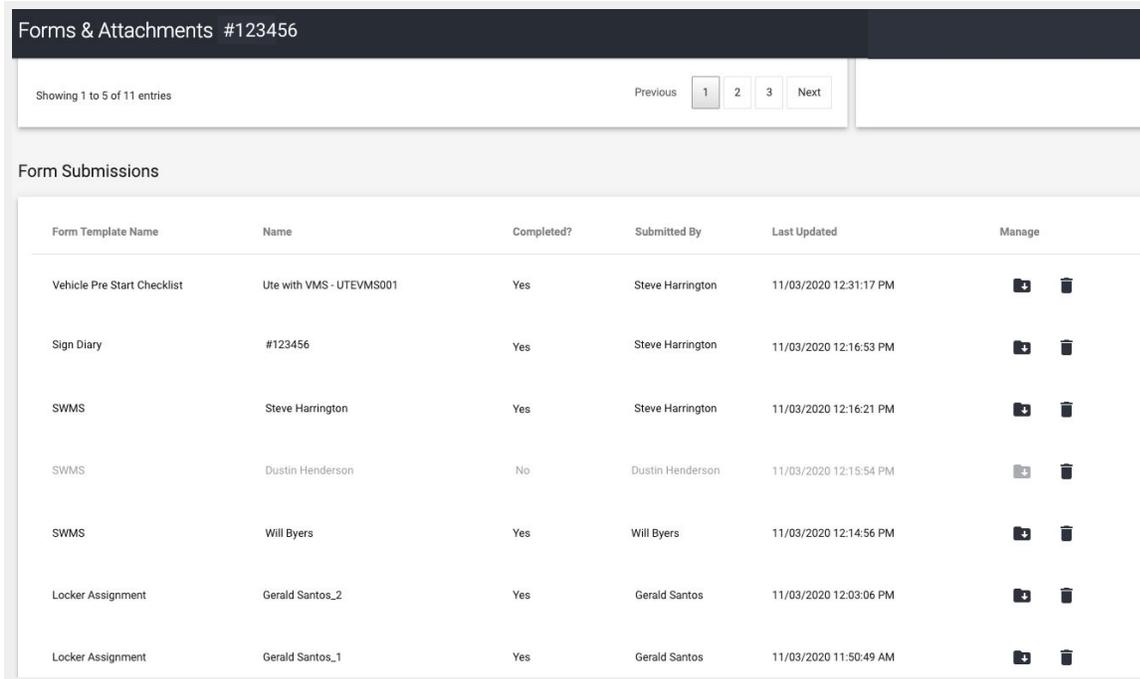
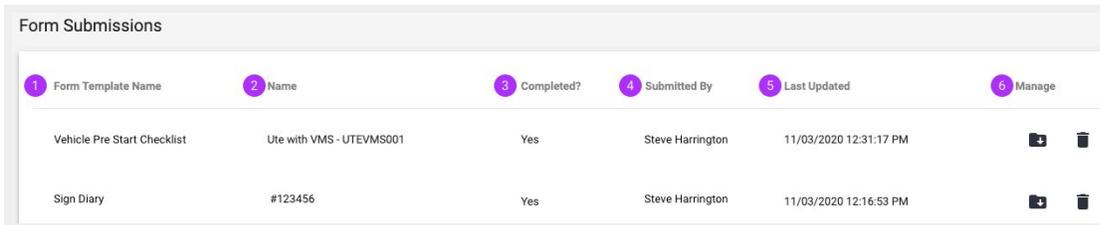


Fig 29. Form submissions on jobs



- 1. Form Template Name**  
This is the name of the Form Template the entry uses
- 2. Name**  
Job Forms will display the job number as the entry  
Worker Forms will display the name of that specific worker  
Vehicle Forms will display the name of that Vehicle Type and the Registration number  
Asset Forms will display the name of that Asset and the Unique Item Identifier
- 3. Completed? Yes/No**  
Incomplete forms (saved as draft on mobile) appear here, but are greyed out
- 4. Submitted by**  
The worker who submitted the form
- 5. Last Updated**  
The date and time the form was submitted

## 6. Manage

Folder icon - downloads PDF

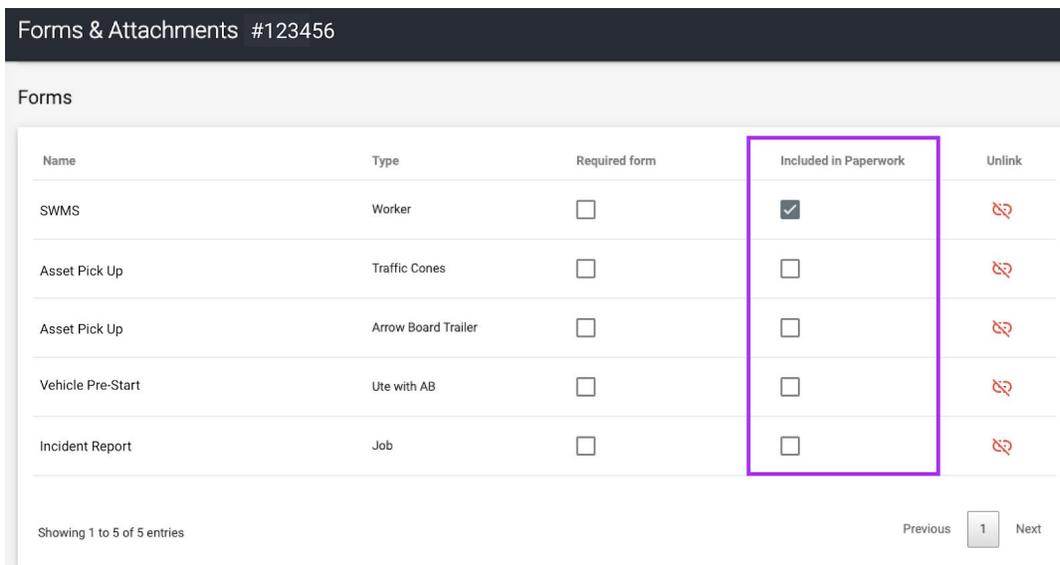
Trash icon - deletes the entry

## Paperwork

When a Timesheet is submitted, any form entries that have 'Include in Paperwork' checked on the template will also be included in Paperwork.

For inherited forms, the setting will keep whatever is applied at the Branch or Company level. If you are attaching a form straight to a job it will use whatever is set at the Form Settings.

You can override this setting simply by checking the checkbox on or off on the form template in the Forms and Attachments section.



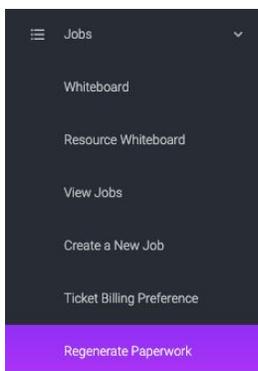
Name	Type	Required form	Included in Paperwork	Unlink
SWMS	Worker	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Asset Pick Up	Traffic Cones	<input type="checkbox"/>	<input type="checkbox"/>	
Asset Pick Up	Arrow Board Trailer	<input type="checkbox"/>	<input type="checkbox"/>	
Vehicle Pre-Start	Ute with AB	<input type="checkbox"/>	<input type="checkbox"/>	
Incident Report	Job	<input type="checkbox"/>	<input type="checkbox"/>	

Showing 1 to 5 of 5 entries

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Fig 30. Paperwork settings for forms

## Changing the Paperwork Settings for already submitted form entries



If you want to include or exclude a form entry from paperwork, after a Timesheet has already been submitted, you will need to firstly override the setting as outlined above, then go to 'Regenerate Paperwork'

Here you can type in the date range, branch and/or companies, or a specific job number, and select 'Regenerate'.

Fig 31. Regenerate Paperwork