Mobile Forms Management

Note: The below guide refers to the New Mobile Form Builder. In case you are still using the old Mobile Form builder, please refer **here**.

IMPORTANT: *The old Mobile Form builder will be deprecated soon, so we strongly advise you to apply the new one once you get familiarized with it, by pressing "**Apply new Mobile Form builder**".*

Mobile Forms can be used to send instructions/questionnaires to your employees, ask them questions, or even let them freely fill in any comments or information related to specific Checkpoints/ Sites, they want to share with the monitoring center!

You have total control over Mobile Forms creation, as they are fully customizable.

Adding a new Mobile Form

Once you decide which Mobile Form elements
you will include in your form, you can start setting it up by following the steps below:

- Press Company -> Mobile Forms.
- Press on "+Add" button displayed on the top sub-menu; the system opens a new page to add a new Mobile Form.

Adding elements to your Mobile Form

- On the left you can see your available "Form Element" options:

- **Header**: Read Only — Usually used for headings & heavier text. Use it as your Title, Section separator, or to give general instructions to your Workers.
- **Text Input**: Single Line Input — Can be used for short descriptions/comments the Worker would like to share with their Managers.
- **Image**: Read only — Can be used by the Manager to add an image as a reference for the Worker.
- **Text Area**: Multi-Line Input — Use it if you want your Workers to add more detailed information about the matter.
- **Radio**: Can be used for single choice answers.
- **Checkbox**: Usually used for multiple choice answers. Add more than 1 Checkbox elements to achieve that.
- **Select**: Can be used for single choice answers. More compact than the Radio element.
- **Signature**: Can be used to request the Worker to add their signature.
- **Select (Entity Based):** Can be used for searching/selecting a Guard of the system.
- **Image Capture**: Can be used to request the Worker to capture image(s) while filling in the Mobile Form.

- Drag your desired elements and drop them on the right part of the page.
- Once you drop an element, a pop-up window will appear; setup your element based on your needs and once done, press "Save".

*Tip: You can edit your element even after Save.*

- You can preview your Mobile Form at any stage during the creation process.

- When you are happy with your Mobile Form, add a name under "Name this Form" field and press "Save".

Assign your Mobile Form to a checkpoint

Once you have created your Mobile Form, you can assign it to a checkpoint(s); this way, it will come up when your Workers scan the respective checkpoint in order to fill-it in.

- From the main page, select your Mobile Form.
- Press "Assign Checkpoint" from the top sub-menu
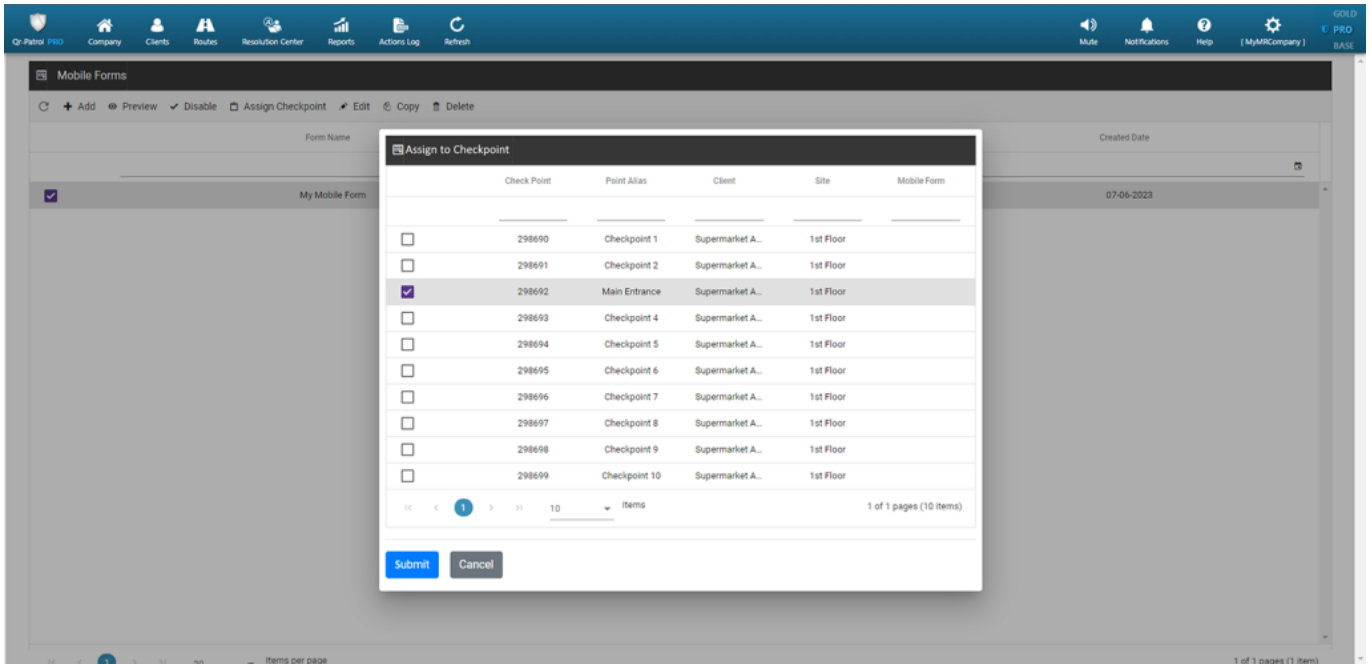
- Locate the Checkpoint(s) you want to assign your Mobile Form to and select them. • Press "Submit".

Allow the Guard to send a Mobile Form without physically scanning a checkpoint

If you want your Guards to send a Mobile Form without physically scanning a checkpoint, you can do so by following the steps mentioned below:

- Access your Guard's settings by navigating to menu "Company" >> "Guards"
- Select and edit the Guard of your interest
- Enable the "Fetch Client List" option
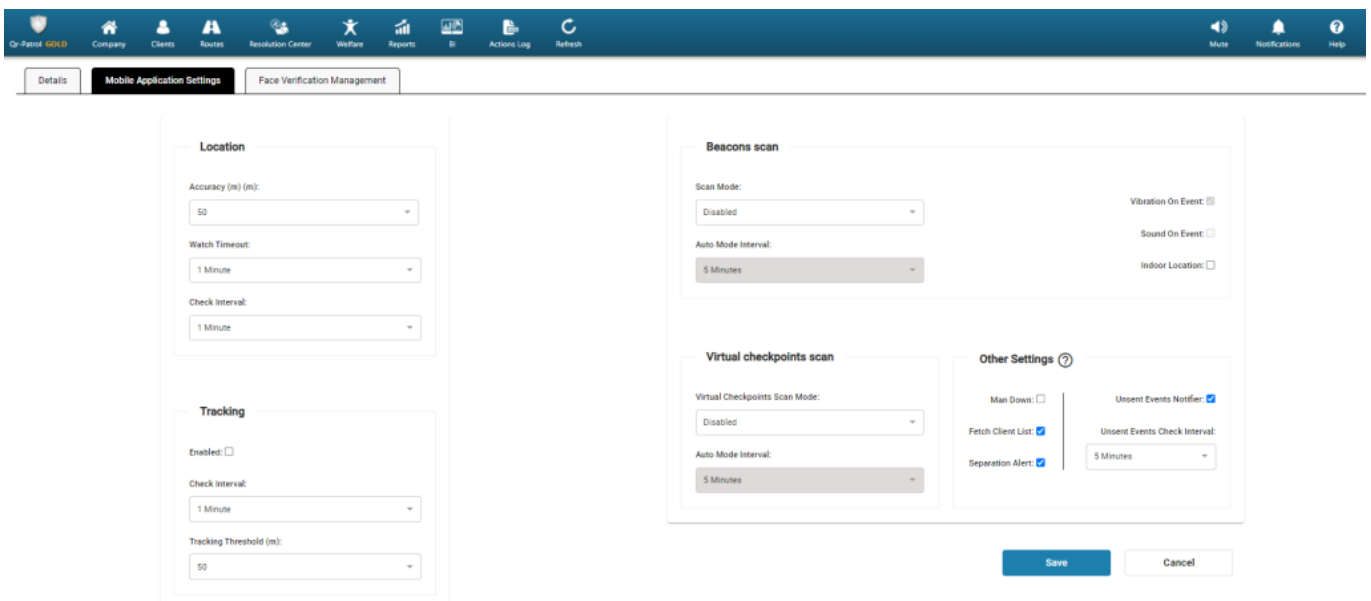
Your Guards will now be able to find and fill-in a Mobile Form without physically scanning a checkpoint, by pressing the "Scan" button in their mobile application and choosing "Mobile Forms".

View Mobile Forms Answers (Filled-out Forms)

You can check the answered Mobile Forms on the Events Browser either one by one (option 1) or in bulk (option 2):

- Select the target Checkpoint Scan Event from the Events Browser panel
- Press on "View Details" button, to open a pop-up screen with details about the target Scan Event
- Field "Form" will display one of the following values:
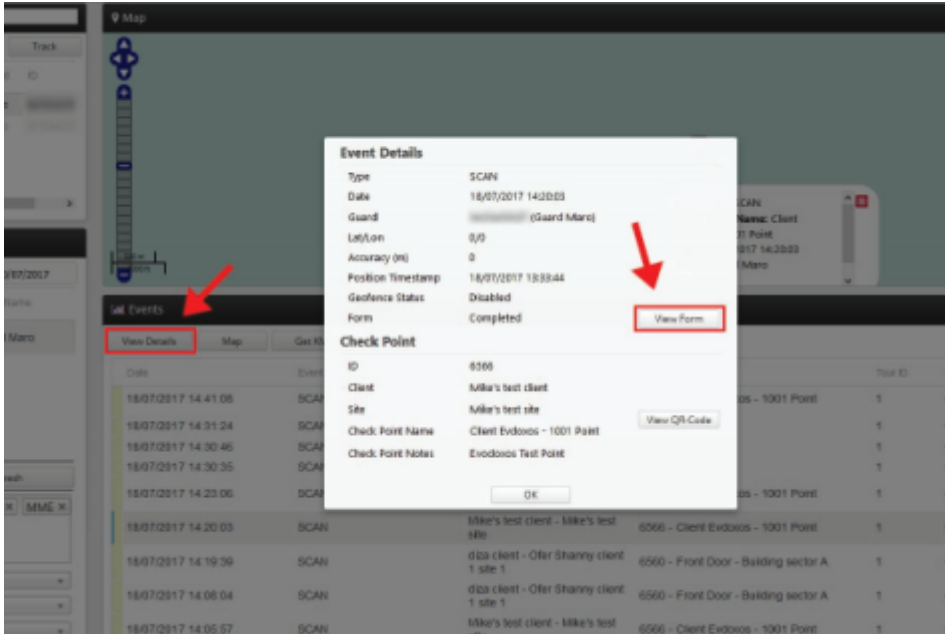
1. **Completed** (in such case, you can see the Guard's filled-in details by pressing on the "View Form" button)
2. **Not Completed** (if the Guard performed the checkpoint scan but skipped filling the Form)
3. **Not Available** (if the checkpoint is not associated with any Form)

You can now check the guard's reply in a pop-up window and proceed with your work.

Alternatively, you can export all the submitted Mobile Forms **in bulk** or all the **responses of a specific Mobile Form**, by following the steps below:

1) Go to the Events Browser and select the related Guard(s) and Tour(s)

2) Add the "**FORMS ATTACHED**" filter by pressing on the filters tab of the Events Browser in order to get on the left side all the Scan Events that include a submitted Mobile Form

3) On the left, there will be available the "**Print All Forms**" button. By pressing on it, you have the following options:
    i) "**Export to PDF**": export all the submitted, filled-in Mobile Forms to a PDF file
    ii) "**Export to Excel**": export all the submitted, filled-in Mobile Forms to an Excel file
    iii) "**Choose a mobile form**": select a specific Mobile Form for which you would like to extract all relevant submitted responses