Question 1

Question 2

Question 3

SUBMIT

MyLoneWorkers USER GUIDE

Mobile Forms Management

Mobile Forms

Do you want to give more detailed checkpoint instructions to your employees?

Do you want them to answer a series of questions after they perform an action?

Do your employees need to write even more detailed reports to send to the Monitoring Center?

Do you want to keep all checkpoint-related information organized and in one place?

 If the answer to at least one of these questions is yes, then you've come to the right place - our latest Mobile Forms feature will help your company achieve those goals!
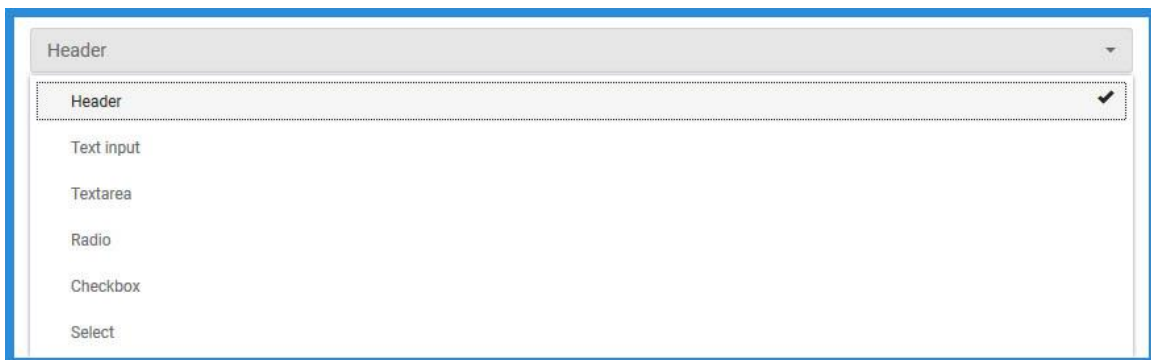
Mobile Forms can be used to send instructions to your employees, ask them questions, or even let them freely fill in any comments or information they want to share with the monitoring center!

First Things First!

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

A Form can consist of 6 **Element types**:

1. Header (Read only - can be used to name the form for instructions/tasks addressed to the employee, or other information the manager would like to add)

2. Text Input (Single-line input - can be used for short comments/information the employee would like to share with the Monitoring center)

3. TextArea (Multi-line input - can be used by the employee for more detailed reporting)

4. Radio (Can be used for single choice selections)

5. Checkbox (Can be used for multiple choice selections)

6. Select (Dropdown list - can be used for single choice selections)

Getting Started – Adding a New Form

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

- While on the Web Application, press Company → Mobile Forms

- Press on "+Add" button displayed on top left of the forms list; the system opens a new page to add a new form

- **Step 1: Define number of Form Elements:** On the first screen, you can add/delete **Form Elements** (i.e. lines) as per your requirement for the new form (under this step, you only define the **number** of form elements you would like to add – not their types); once ready, press "Next"

Note: In order to Add a Line, press the blue add button ☐ on the left.
In order to Delete a Line, press on the red delete button ☐ on the right of each line.
In order to change Line Order, press on the orange up/down button ☐ ☐ on the left of each line.

- **Step 2: Define Form Elements Types:** On the second screen, by clicking on a previously added Form Element (line), a pop-up window will appear where you can select the Element's type (see "First Things First!" section); after you select a type, more settings will appear under **"Edit Properties" section**, for you to edit and fully customize it!

Select an element type

▼ Select type in the list below :

Textarea   ▼

👁 Preview :

Is there anything wrong with the elevator? Please describe.

✎ Edit properties :

Label text :   Is there anything wrong with the elevator? Please describe.

Required :   ☐

Description :   Add/Edit description here

OK   Cancel

The following list presents the **available Properties per Element Type:**

- Header: "Header Text", "Description"
- Text Input: "Label text", "Placeholder", "Required", "Description"
- TextArea: "Label text", "Required", "Description"
- Radio: "Add new radio", "Edit/Remove radio", "Label text" "Required ", "Description"
- Checkbox: "Label text", "Required", "Description"
- Select: "Add new options", "Edit/Remove options", "Label text", "Required", "Description"

Refer to the list below if you require further instructions for each Property:

- Header Text/ Label Text = The title of the header/ label; can be used for short instructions/comments
- Description = The description of the element; can be used for longer instructions/comments/information the manager would like the employee to know
- Placeholder = Indicative temporal text on the input area; can be used to give instructions/notes to the employee on how to substitute it with the actual input
- Required = Should be checked if the field is mandatory
- Add new radio/ options = Click to add a new radio (in case of Radio type)/ option (in case of a Select type)
- Edit/Remove radio/ options = Click to remove a radio (in case of Radio type)/ option (in case of a Select type)

Almost done! Press "Next".

- **Step 3: Preview and Save the Form:** On the final screen, you can see a preview of your new form,
  Note: Don't worry, if you don't like something you can always go back and change it!
- Add a Name for your form, by filling the respective field on the left and
- Finally, press "Save this Form"

Assigning Checkpoints to your Form

Once you have created your form, you have to assign checkpoint(s) to it: this way the Form will appear to the employee when scanning it, in order to fill-it!

You can assign checkpoints to a Form by following the steps below:

- While on the Forms page, press on the "Assigned Checkpoints" button Under Actions column; the system opens a pop-up page with the Company's checkpoints

- Select the checkpoint(s) of your choice by clicking on the target checkbox in-front


Press on "Save" button

Your Form has been fully set-up!

Now, every time a employee scans some checkpoint assigned to a Form, the Form will appear for them to fill-it!

View Forms Answers (Filled-out Forms)

You can check the answered Forms on the Events Browser:

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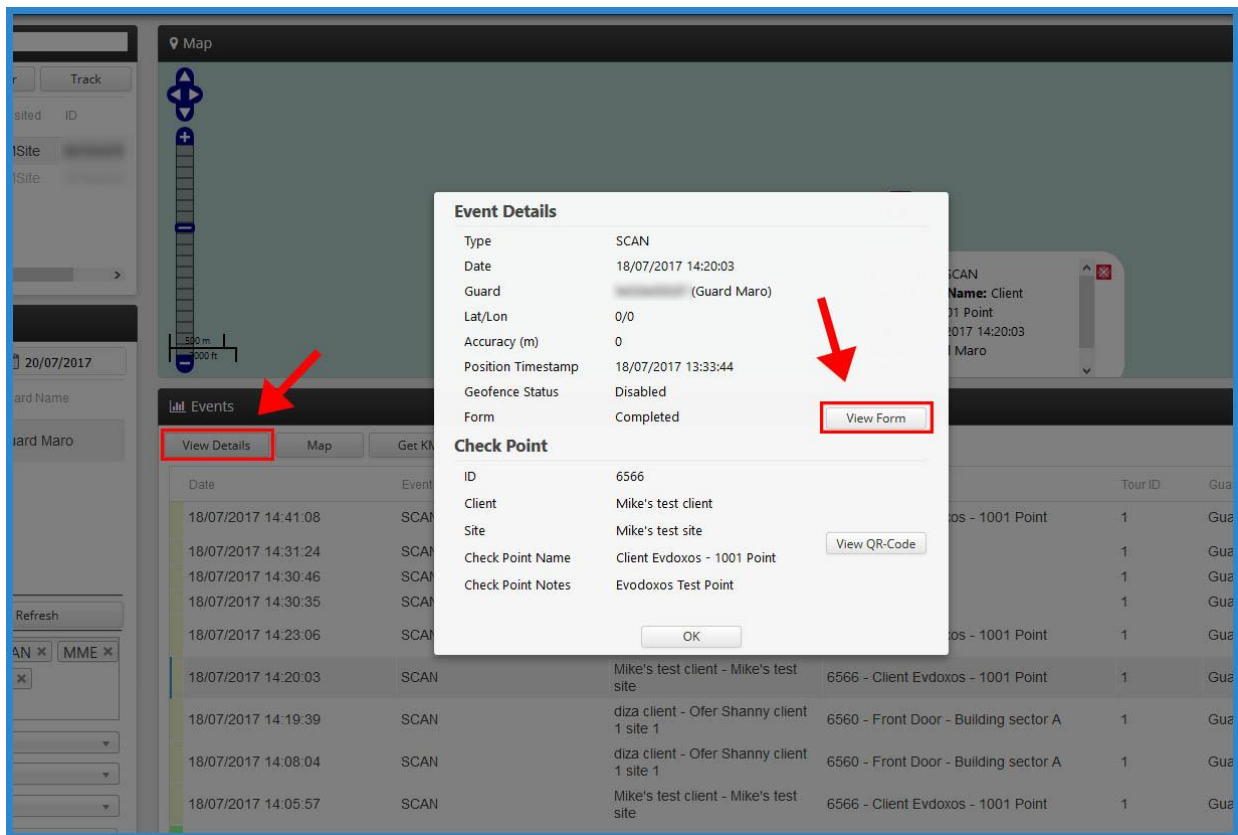
- Field "Form" will display one of the following values:
  - Completed (in such case, you can see the employee's filled-in details by pressing on the "View Form" button)
  - Not Completed (if the employee performed the checkpoint scan but skipped filling the Form)
  - Not Available (if the checkpoint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

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