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Mobile Forms

Setup guide

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Welcome to Dattrax Mobile Forms

- Dattrax Mobile Forms is a software solution from Dattrax Software Ltd. that allows you to create forms and procedures in Microsoft Word, publish them to mobile devices, view the submitted versions of them and capture the data for onward analysis.
- This solution is predominantly aimed at small to medium sized enterprises who have either “personal” or “shared” mobile devices.
- The solution uses several components, which are described in the following sections.
 - Section 1 - Initial setup of your account, devices and users
 - Section 2 - Enabling the Mobile Forms service and using the Word Add-in
 - Section 3 - Filling in a form and obtaining the submitted PDF and data

1

Set up your account and devices

- In this section you will:
 - Create a Datrax Software account
 - Set up your Company
 - Set up a Device
 - Set up either a "Badge" or "Non-Badge" user

Create a Dattrax Software Account

- Go to www.dattrax.com
- Create a new account
- Verify your account with the link sent to your e-mail

Create new account

Your name / Key Contact: Brian Cohen

EMail: bcohen25pct@gmail.com

Password:

Confirm Password:

Set up your company



- Click **Company Setup**
- Fill in details about your company
- Click the **tick** when done.

Your Company Config

Set up your company and contact details below.

Company name	<input type="text" value="New Company"/>	<input type="checkbox"/> <input checked="" type="checkbox"/>
Contact person	<input type="text" value="Brian Cohen"/>	
Contact e-mail address	<input type="text" value="bcohen25pct@gmail.com"/>	
Billing name and delivery address	<input type="text" value="(invoice via e-mail)"/>	
Billing person contact name	<input type="text" value="Brian Cohen"/>	
Billing e-mail address	<input type="text" value="bcohen25pct@gmail.com"/>	

Set up a device



- Click **Device Setup**
- Follow the link to the Google Play Store and install **Dattrax Account Manager** on your chosen device.
- Click the **Plus** button to bring up a QR code.
- On your chosen device, open **Dattrax Account Manager**.
 - Change the device's name to one you will recognize and click **Start**
 - Allow the app to use the camera
 - Scan the QR code

Your device will be registered to your company.

The screenshot displays the Dattrax Account Manager app interface. At the top, there is a header bar with a 'Company:' dropdown menu set to 'Newergy', a back arrow, a plus sign, and a link to 'Get Dattrax Account Manager from Google Play Store'. Below this is a 'Register Device' dialog box with a QR code and a 'Close' button. In the foreground, the 'Account Manager' app is open, showing a 'Register device to use Dattrax Account Manager' screen. This screen includes a 'What do I need to do?' section with instructions: '1. Enter a suitable name for your device to it can be recognised by your System Administrator.' and '2. Scan the QR code your System Administrator gave you for this application.' Below the instructions is a text input field for 'Name for this device:' containing 'Safety Team S-101' and a 'START' button.

Set up users as “non-badge” users



A “non-badge” user is a user who can log in with just their username and a PIN. This is different to a “badge” user, who logs in with an RFID badge. This page describes how to set up non-badge users.

- Click **User Setup**
- Select your **Company** then click the **Plus** button to add a new user
- Fill in the user’s **Name** and **E-mail address**
- Click the **Lock** button to set up a PIN for this user
- Open Account Manager on a registered device and click Non-Badge Users
- Click the user and enter their PIN

A screenshot of a user setup form. At the top, it shows 'Company: Newergy' with a dropdown arrow and two circular buttons (left arrow and plus). Below this is a user profile card with a blue silhouette icon. The form fields include: 'Name' with a text box containing '[New User]'; 'E-Mail' with a text box containing 'user_email@your_compar'; 'Date registered' with a text box containing '29-Dec-2023 13:19'; and 'Unique ID:' with a text box containing 'a364fe28-fdcf-4ca2-9f61-'. At the bottom of the form, there are two checkboxes: 'Can setup other users' (unchecked) and 'Non-badge user' (checked). Below the checkboxes are three green buttons: a circular arrow (refresh), a trash can (delete), and a checkmark (confirm).

You will see that the user is logged into Account Manager

Set up users as Badge Users

Badge users are users who can log into your devices using an RFID badge and a PIN. This section describes how to configure them.

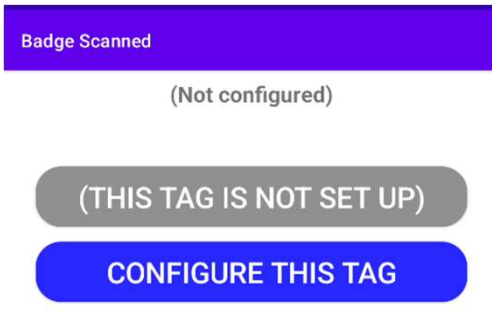
Pre-requisites:

- If you want a specific **User** to be able to set up RFID badges, ensure that “**Can setup other users**” is ticked in their **User Setup**.
- If you want a specific Device to be able to set up RFID badges, ensure that “**Can setup RFIDs**” is ticked in the device’s **Device Setup**.

Setting up an RFID badge:

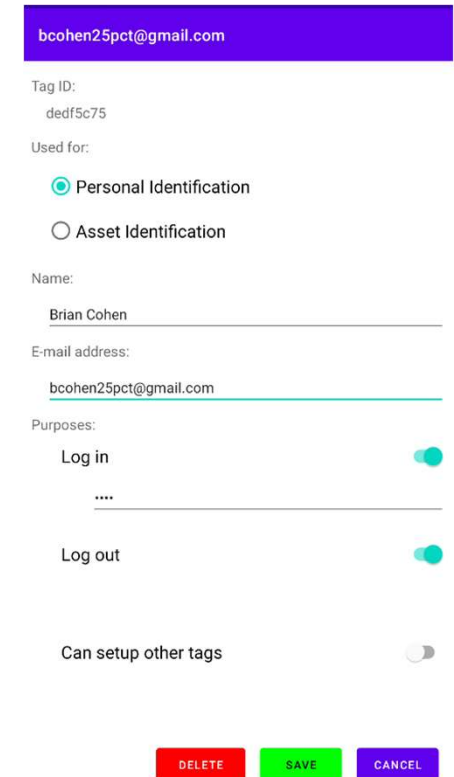
Hold the badge to the back of the device. Note: If other apps are installed to respond to RFID badges, you may be prompted as to which app you want to handle the badge. You may want to disable the other apps to simplify setup. See Troubleshooting for help on how to do this.

Set up users as Badge Users (page 2)



Setting up an RFID badge:

- Hold the badge to the back of the device.
Note: If other apps are installed that respond to RFID badges, you may be prompted as to which app you want to use. You may want to disable the other apps to simplify setup. See Troubleshooting for help on how to do this.
- Click **Configure this Tag**
- Enter the details for the person whose RFID badge it is.
- You can set the initial PIN for them, which they can change after they successfully log in using their RFID badge
- **Save** your changes
- **Test** the badge by holding it to the back of the device.



2 Start using Mobile Forms

- In this section you will:
 - Switch on your Mobile Forms service
 - Download the Microsoft Word Add-in
 - Build a Mobile Form
 - Deploy your form to your registered devices

Switch on your Mobile Forms service

Each service provided by Dattrax Software needs to be enabled for your account. To enable a service, go to **Services** and click the **Change Services** button.

Select the **Mobile Forms** service and click **Confirm**. All services are available on a trial basis.

Confirm your agreement to use the service.

The trial license for Mobile Forms grants you a small number of form submissions per month.

When you are satisfied with the service's capabilities, you can purchase a license key from the shop which will provide you with a much greater number of submissions each month.

Once you have purchased a license you will be sent it via e-mail. Copy and paste the license key into the box shown here and press Save to activate your license.

The screenshot displays the 'My Services' section of the Dattrax Software interface. At the top, a 'Company' dropdown menu is set to 'Newenergy'. Below this, a 'My Services' panel features a '+ Change Services' button. To the right, a 'Select Services' panel shows two service cards: 'Mobile Forms' (with a blue checkmark icon) and 'Mobile S...' (with a red arrow icon). The 'Mobile Forms' card includes the description 'Manage forms for mobile devices from existing documents.' Below the service cards, a license key entry box is visible, containing the text '{Trial}'. To the right of this box are buttons for 'Hide Key', 'Copy', and 'Save'. In the top right corner, a 'Services' button is present with the text 'Sign up for services from Dattrax Software'. At the bottom left of the interface, a 'Mobile Forms' card is shown with its description: 'Manage forms for mobile devices from existing documents.'

Download the Microsoft Word Add-in

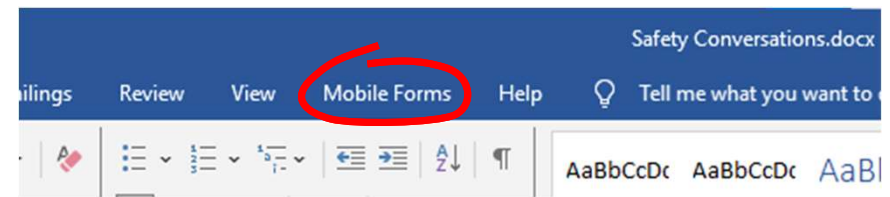


Click into Mobile Forms from the front page of the www.dattrax.com website. (Note: The Mobile Forms icon only appears once you have enabled the service – see previous page).

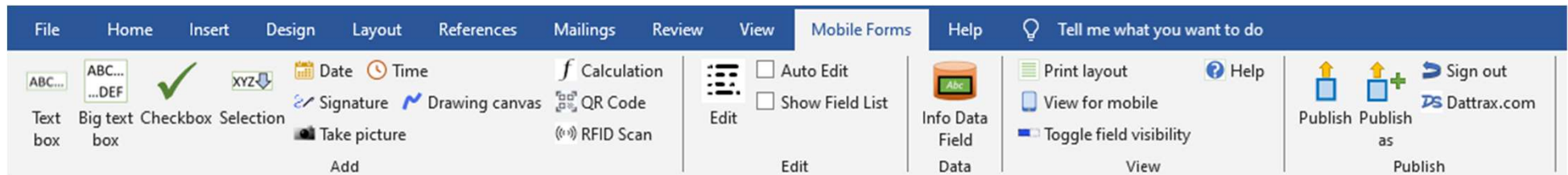
Click the **Word Add-in** button to download the Setup program for the add-in.

Run the Setup program. Note that some anti-virus / malware protection systems may ask you to confirm you are sure about the download.

Open Microsoft Word and you should now see a **Mobile Forms** menu in Word.



Build a Mobile Form



- Using either an existing Word document, or starting afresh, click on items in the Add section of the Mobile Forms menu to add form elements to your document.
- Each item you add needs a unique name. This is so that data collected in the form element can be referenced later.
- Each item you add may have additional options (for example: A selection box lets you specify the items in the selection box).

- Note: fields are, by default, invisible in your document. You can see the detail of the fields at the points you have added them using the **Toggle field visibility** option in the View menu.

Newenergy Unlimited
Energy for all of our futures
Safety Conversations
Engage in conversations with the workforce to improve our safety outlook.



Working at Height

Scanned Tag:

Scanned QR Codes:

Observation	Yes / No / Unseen	Comments
Has everyone signed onto the permit?		
Does everyone involved understand the risks of the task?		
Has all of the equipment been		

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Working at Height

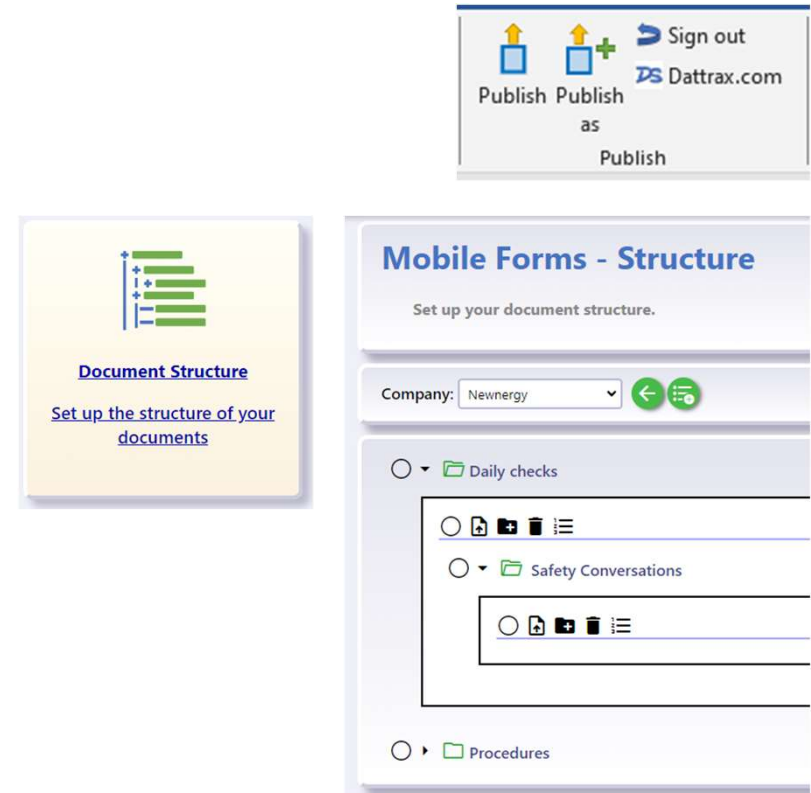
Scanned Tag: { DOCVARIABLE "RFID|Scanned Tag|" \" MERGEFORMAT }

Scanned QR Codes: { DOCVARIABLE "QR|QR Codes|Name " \" MERGEFORMAT }

Observation	Yes / No / Unseen	Comments
Has everyone signed onto the permit?	{ DOCVARIABLE "Select Signed Permit? Yes/No /Unseen" \" MERGEFORMAT }	{ DOCVARIABLE "Text Comment Signed Permit? \" MERGEFORMAT }

Deploy your form to registered devices

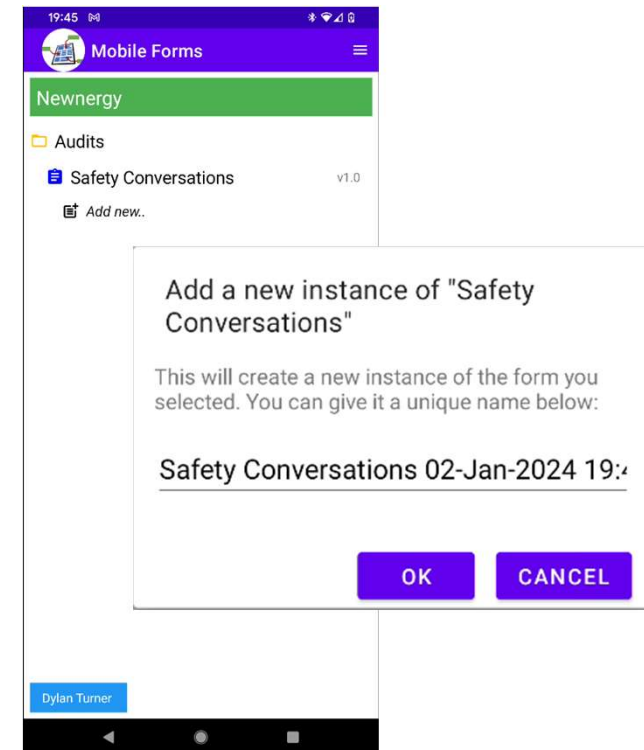
- To use your forms on your mobile devices, save it first to your document storage area, then click the **Publish** button. Note that “**Publish as**” will always ask for a new location in Mobile Forms to save it to, whereas “**Publish**” will only ask you the first time, then it will publish to that location each time.
- Forms must be published into a folder in Mobile Forms. To set up folders, click the **Dattrax.com** icon, go to **Mobile Forms**, then **Document Structure**.



3

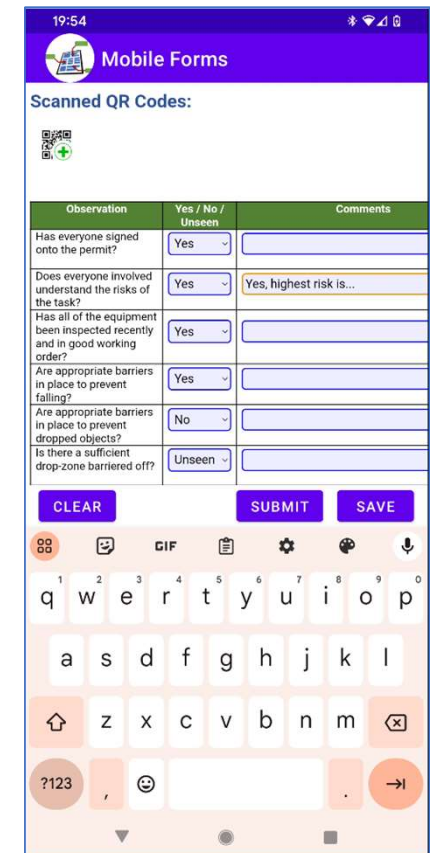
Filling in a form on a mobile device

- Log into your device using your RFID badge and PIN.
- Open Mobile Forms on your Mobile device.
- Tap on your folder structure to expand it, then tap your document to reveal "**Add new...**", and tap that.
- This adds a new instance of your form. Click OK to accept the new it is given and open it.



Filling in a form on a mobile device

- Simply complete the form as designed.
- To save the form but not submit it just press **Save**.
- Once your form is ready to submit, press **Submit**.
- When forms are submitted, the completed instance is removed from your device and is then available from the web site as a PDF. The data is also available in Excel or JSON format.

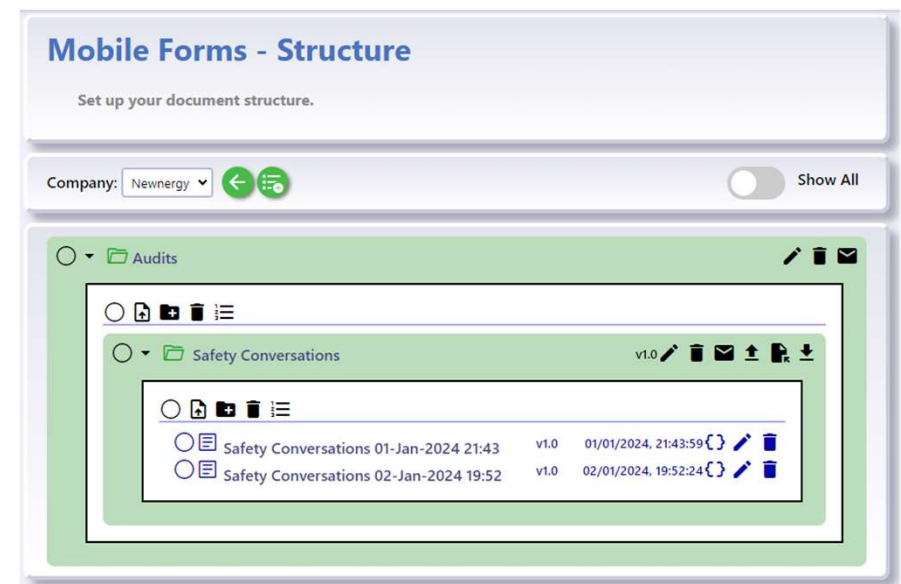


The screenshot shows a mobile application interface for 'Mobile Forms'. At the top, there is a status bar with the time 19:54 and various icons. Below the title bar, there is a section for 'Scanned QR Codes' with a QR code icon. The main part of the screen is a table with three columns: 'Observation', 'Yes / No / Unseen', and 'Comments'. The table contains several rows of safety-related questions. Below the table, there are three buttons: 'CLEAR', 'SUBMIT', and 'SAVE'. At the bottom, a virtual keyboard is visible, indicating the form is being filled out on a mobile device.

Observation	Yes / No / Unseen	Comments
Has everyone signed onto the permit?	Yes	
Does everyone involved understand the risks of the task?	Yes	Yes, highest risk is...
Has all of the equipment been inspected recently and in good working order?	Yes	
Are appropriate barriers in place to prevent falling?	Yes	
Are appropriate barriers in place to prevent dropped objects?	No	
Is there a sufficient drop-zone barriered off?	Unseen	

Filling in a form on a mobile device

- To view the completed forms, sign into www.dattrax.com and click the Mobile Forms section.
- Click Document Structure, expand your folders to the document you want.
- To view the PDF version, click the form title.
- To download the JSON data, click the { } icon.
- You can rename or delete the individual submissions using the pencil / trash can icons.
- You can download all data in spreadsheet format by selecting the required forms with the round selection option on the left of them (or select all using the parent folder selection option), then click the "1 2 3" icon.



Filling in a form on a mobile device

The screenshot shows the 'Mobile Forms - Structure' interface. At the top, it says 'Set up your document structure.' Below that, there's a 'Company:' dropdown set to 'Newenergy', a back arrow, a refresh icon, and a 'Show All' toggle. The main content area shows a folder hierarchy: 'Audits' (expanded) containing 'Safety Conversations' (expanded). Under 'Safety Conversations', there are two items: 'Safety Conversations 01-Jan-2024 21:43' and 'Safety Conversations 02-Jan-2024 19:52'. Each item has a version 'v1.0', a timestamp, and icons for edit, delete, and download. Callouts point to various elements: 'Select all within this folder' points to the folder selection icon; 'Download selected form data into spreadsheet' points to the download icon; 'Download individual data' points to the individual download icon; and 'Rename and Delete' points to the edit and delete icons.

Mobile Forms - Structure

Set up your document structure.

Company: Newenergy

Show All

Audits

Safety Conversations

Safety Conversations 01-Jan-2024 21:43 v1.0 01/01/2024, 21:43:59

Safety Conversations 02-Jan-2024 19:52 v1.0 02/01/2024, 19:52:24

Select all within this folder

Download selected form data into spreadsheet

Download individual data

Rename and Delete

Features

Find out about some of the cool features in Mobile Forms

Features – E-mail on form submission

- Use the mail icon on a folder to set up an e-mail address that will receive an e-mail notification when a form is submitted in that folder or sub-folders.
- We recommend using your e-mail tool's Group e-mail feature to manage distribution lists to many people, then only specifying one e-mail address (or group address) in the e-mail setting.



Features – Download the original document

- Lost the original document that you uploaded to create this form? Don't worry, just press this icon to download the original.



Features – Create pre-filled instances of forms

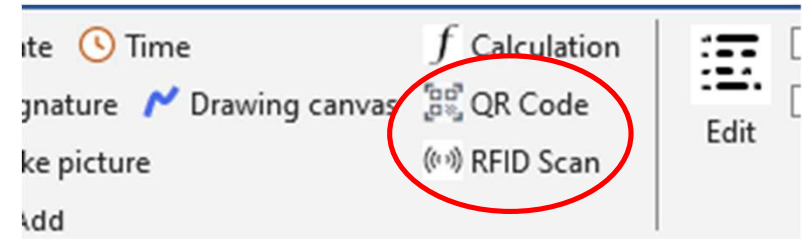
- Download a spreadsheet template using the spanner icon.
- Fill it in, save it, then upload it using the multi-document “plus” icon (well, what would you call it?).
- An instance of the form will be created with pre-populated data from your spreadsheet.

The image shows a software interface with a document hierarchy and a spreadsheet template. The hierarchy includes 'Audits' and 'Safety Conversations' (v1.0). A red circle highlights a 'plus' icon in the 'Safety Conversations' toolbar. Below, an Excel spreadsheet titled 'Test2 - Nine Records Safety Conversations.xlsx' is shown. The spreadsheet has a table with the following data:

Mobile Form Name	Signed Permit?	Comment Signed Permit?	Understand risks?	Comment Understand risks?	Equipment OK?	Com
Daily Check 1	Yes	This was pre-signed	Yes	Maybe	No	Equip
Daily Check 2	Yes	So was this form	No	Not at all	No	Equip
Daily Check 3	Yes	Any this was also pre-signed	Yes	Some OK	No	Equip
Daily Check 4	No	But this one wasn't			No	Equip
Daily Check 5	No	Nor was this one			No	Equip
Daily Check 6	No	Nope, neither this one!			No	Equip
Daily Check 7	Yes	But this was!			No	Equip
Daily Check 8	Yes	Also this			No	Equip
Daily Check 9	Yes	And this			No	Equip

Features – Scan QR codes and RFID tags

- Add a QR code or RFID scanner to your forms with the options in the Word Add-in.
- Icons appear in your forms when they're used on mobile devices. Clicking the RFID tag gives the user ten seconds to present an RFID tag to the device. The QR scanner opens the device camera to scan QR codes.
- The QR Code scanner accepts regular QR codes, but also automatically integrates with Datrax QR Code Manager for enhanced QR code management.



Features – Calculations in Forms

- Add a calculation to a form with the Calculation option.
- In the Options box add a formula that returns a result.
- Reference fields by putting their names in square brackets.
- Formula are evaluated with the Javascript engine, though function calls aren't allowed.
 - == means "is equal to"
 - In-line "IF" statements are useful, e.g.
 - <condition>?<result if true>:<result if false>

The screenshot shows a software interface for adding a calculation field to a form. At the top, a ribbon contains various field types: 'Time', 'Signature', 'Drawing canvas', 'QR Code', 'RFID Scan', and 'Calculation'. The 'Calculation' option is highlighted with a red circle. Below the ribbon, a dialog box titled 'Enter details for the field you want to add' is open. It contains the following fields:

- Field Type:** A dropdown menu set to 'Calculation'.
- Field Name:** A text input field containing 'Overall Score'.
- Options:** A text area containing a formula:
$$([Signed\ Permit?]==\ 'Yes'\ ?1:0) + ([Understand\ Risks?]==\ 'Yes'\ ?1:0) + ([Equipment\ OK?]==\ 'Yes'\ ?1:0) + ([Barriers\ Prevent\ Fall?]==\ 'Yes'\ ?1:0) + ([Barriers\ Prevent\ ...])$$

At the bottom of the dialog, there is a text label 'Function(Parameter1, Parameter2...)', a green 'Update' button, and a red 'Cancel' button. A small note at the bottom left reads: 'Can't see your fields? Toggle Visibility from the Mobile Forms ribbon.'