



DigitForm quickstart guide

Archipad version 6.0

DigitForm quickstart guide

DigitForm allows you to create personalized and interactive forms, directly from Archipad Cloud.

Create any kind of form or checklist, and add it to your Archipad projects, to use Archipad to fill out your forms and checklists directly from the field, even when you are not connected to the Internet.

What will you find in this document ?

This document will present you useful tips on how to create and use your own forms to improve your work method on construction sites.

We hope that you will not have to read this manual because we worked hard to make DigitForm really easy to use. If you have any questions or suggestions for improvements, don't hesitate give us a call at this toll-free number : +33 422 131 135.

Terminology

Term	Means
Form	Form is used to describe a form or a checklist. It also designates a filled out copy of a form definition.
Form definition	A form definition contains the description, background, and any other information needed for someone to fill out a copy of the form.
Layout	A form layout specifies how a form is rendered on a particular support, such as screen (used for input) or report (used for output)
Fields	Forms contain numerous fields, or spaces to enter data. Each field holds a label so that a user of the form gets an idea of its contents.
Section	A section groups fields, and is similar in some aspects to fields. Sections can contain other sections.

The following steps are the recommended way to create and use DigitForm:

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- Screen layout6
- Report layout6
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When you have followed the steps above, you are ready to create and fill out forms, as well as generate reports based on a form. Always remember to synchronize your work at the end of the day, so that your work is visible to all the others working on the project.

The following pages describe each of these steps in detail.

DigitForm - how does it work?

1



Scan the paper format of the form to create an exact copy

2



Edit the form and add the needed interactive fields to your form

3



After synchronising the form, you can also fill out the forms on your iPad

4



Print or share your filled out forms

CREATE AN INTERACTIF FORM IN 4 SIMPLE STEPS

Create a new form definition

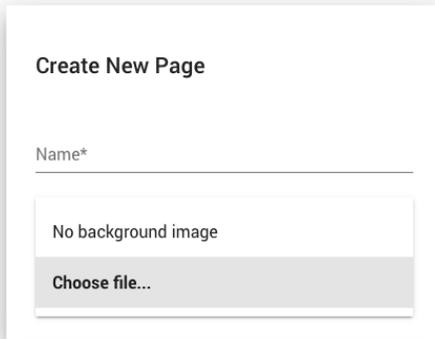
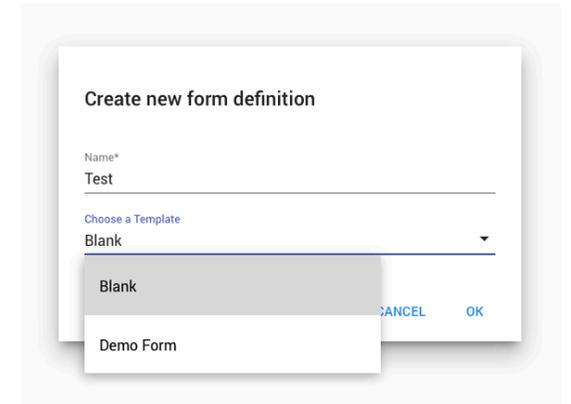
Click on DigitForm to create a new form definition. When you create a new form definition, Archipad automatically creates two layouts: Screen and Report. In either layout you can add new fields. You can also create a new form based on an existing form by selecting it from the *Choose a template* field.

Screen layout

The screen layout will show the fields as a list, optimized for data entry.

Report layout

The report layout will allow you to place each field on the page, making it possible to fill out any existing form that you scanned previously, or print the contents of a form on pre-printed paper.



Add a background to the report layout

You will most likely add a background document to your report layout. This background can be the scan of an existing paper form that you till now filled out manually, or the electronic version of an existing document.

You can add a different background to each page of your report.

When you view the Report layout in Define mode, you will see the page background so you can position each field precisely.

Configure a form

Once you have created a form definition, you will open and edit either the screen layout or the report layout.

If you start with the report layout, you will first scan the report page that you want to digitize, and then place the fields the user has to fill out on the form as you go. When you start with the report layout, each field you add is automatically added to your screen layout. This is the recommended method of defining your forms.

If you start with the screen layout, you will initially concentrate on the fields that the user of your form will have to fill out.

Before you can place any field on your report layout, you must add a Page field to the report layout. Every time you add a page, you can choose a background for that page.

The screenshot shows the Archipad interface for configuring a form. The top navigation bar includes 'PROJECTS', 'INFO', 'PLANS', 'MEETINGS', 'ISSUES', 'DIGITFORM' (with a 'BETA' badge), and 'REPORTS'. A user profile 'test@archipad.com' is visible in the top right. Below the navigation bar, there are tabs for 'Browse', 'Define', and 'Online help'. The left sidebar shows 'Demo Form' selected, with options for 'Screen' and 'Report'. The main content area displays a 'Demo Form' with the Archipad logo and ID 'N*123456-00'. The form contains two tables:

Meeting informations	
Meeting name	Meeting name
Meeting date	04/27/2018
Meeting time	18:03
Participation price	Participation price

Participant informations	
Name	Name
Date of birth	27 April 2018
Phone	Phone
Mail	mail@domain.com

Below the tables is an 'Address :Address' field. The right sidebar, titled 'Field Inspector', shows a list of fields to be added to the form, including 'Address', 'Date', 'Date of birth', 'I declare the above information', 'Mail', 'Meeting time', 'Name', 'Participation price', 'Phone', 'Photo', 'Signature', and 'Signed at'.

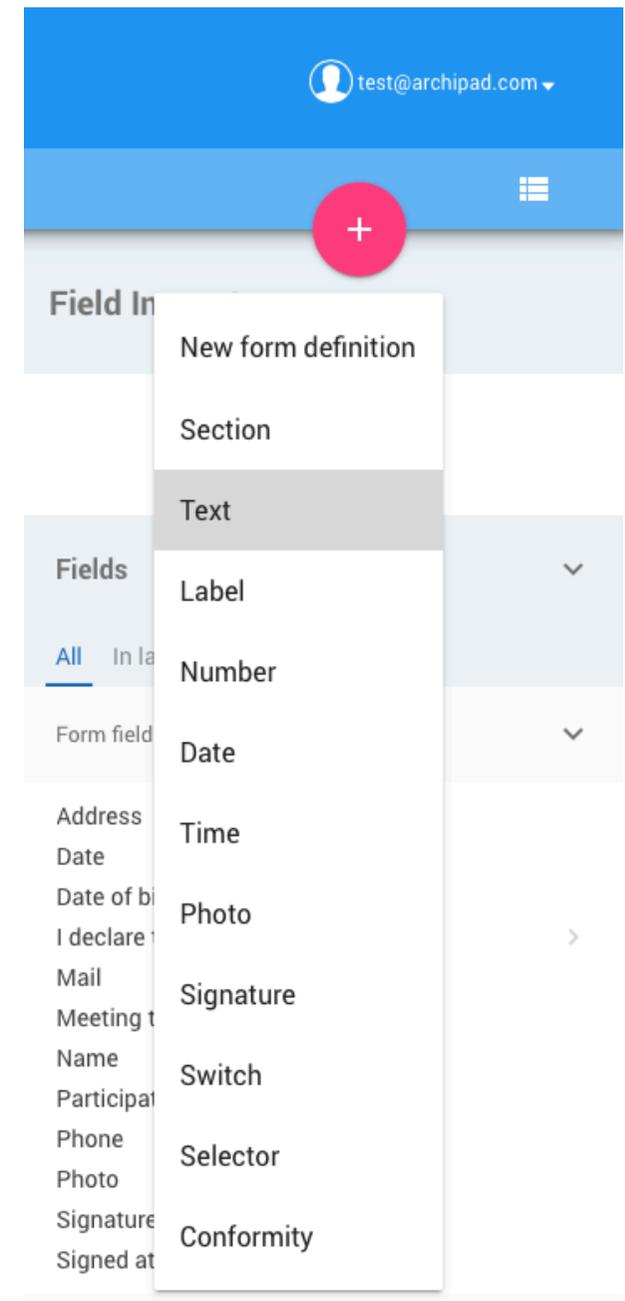
Add fields

When you add fields to the report layout, each field you add is automatically added to your screen layout.

Before you can place any field on your report layout, you must add a Page field to the report layout.

Place all the fields as needed, assigning them useful names so you will know what kind of each field holds. When you are done placing the fields, make sure they are grouped logically on the screen layout, as some data might be better grouped differently when gathering the data than when you are printing out the form.

When you add fields to the screen layout, they are not automatically added to the report layout, as DigitForm would not be able to anticipate as to where the field should be positioned. If you create your fields in screen layout first, select the report layout, and drag the fields with a blue dot to your page, and resize and position them as needed.



Move and resize fields

Any field that you have created in screen layout and not yet positioned in report layout will be marked with a blue dot. Drag the field from the Field Inspector's Field list onto the report layout page, and position and resize the field to cover the area where the field is to show on the printed report.

Be careful with the size you allocate for the field – if you make it too small not all the data that was entered in screen layout will be able to print on the form. In such a case you can also change the font size and font family to print the text smaller and make it fit.

A screenshot of the 'Field Inspector' interface. The title bar is blue with a white plus sign in a red circle and a white menu icon. Below the title bar, the text 'Field Inspector' is displayed. The interface is divided into sections: 'Type' with the value 'Text'; 'Title' with the value 'Serial Number'; 'Number of characters' with the value '23' and a small circular icon; and 'Format' with the value 'Uppercase' and a dropdown arrow.

Note that you can limit the number of characters a text field or a number field can contain.

Publish a form

When you are satisfied with the result of a form you defined, you should synchronize your form definition, so that any other person with whom you have shared the project also has access to that form. The form will only be accessible to anyone with access to the project in which you have created the form. If you want to use the form outside the project in which you created it, you can publish the form definition.

When you publish the form definition, it will become available in any project to which you have access. Publish a form definition once you are satisfied with the results.



The Publish button

When you see the red Publish button on the name of the form definition in the list on the left, changes you made to the form were not yet published. If the red Publish button is not shown, your form has not been changed, and does not need to be published.

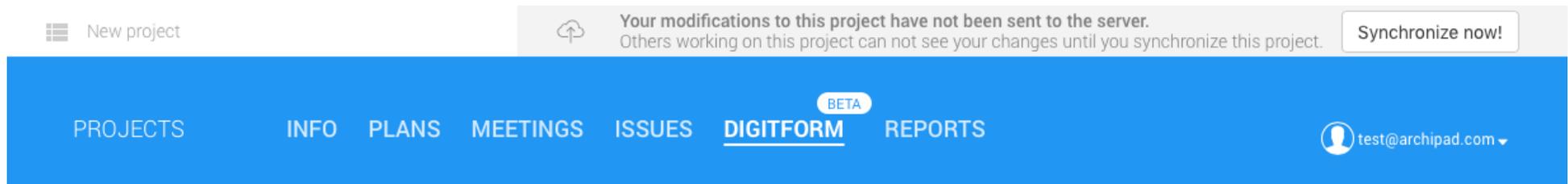
The screenshot displays the Archipad web interface. At the top, there is a navigation bar with tabs for PROJECTS, INFO, PLANS, MEETINGS, ISSUES, DIGITFORM (highlighted), and REPORTS. Below this is a sub-navigation bar with 'Browse', 'Define', and 'Online help' options. On the left side, there is a sidebar with a list of items: 'Fiche test' (with a red globe icon), 'Écran', and 'Rapport'. The main content area shows a form definition for 'Formulaire d'exemple' with the Archipad logo and a form ID 'N°123456-00'. The form contains a table with the following data:

Informations relatives à la visite	
Nom de la visite	Nom de la visite
Date de la visite	04/27/2018

Overlaid on the form is a modal dialog box with the title 'Are you sure you want to publish this form definition ?'. The dialog contains the following text: 'You must publish a form definition before it becomes accessible to others. When you make changes to a form definition that was previously published, you must publish your changes to make them active for others.' At the bottom of the dialog are two buttons: 'CANCEL' and 'PUBLISH'. To the right of the form, there is a 'Field Inspector' panel with the following details: Model ID: 5999257323211333803, Type: Selector, Title: Cerfa, Name: cerfa, and Hidden: (checkbox). At the bottom of the page, there is a footer with 'Mail: mail@domain.com' and a 'Cerfa' status indicator.

Synchronize with the cloud

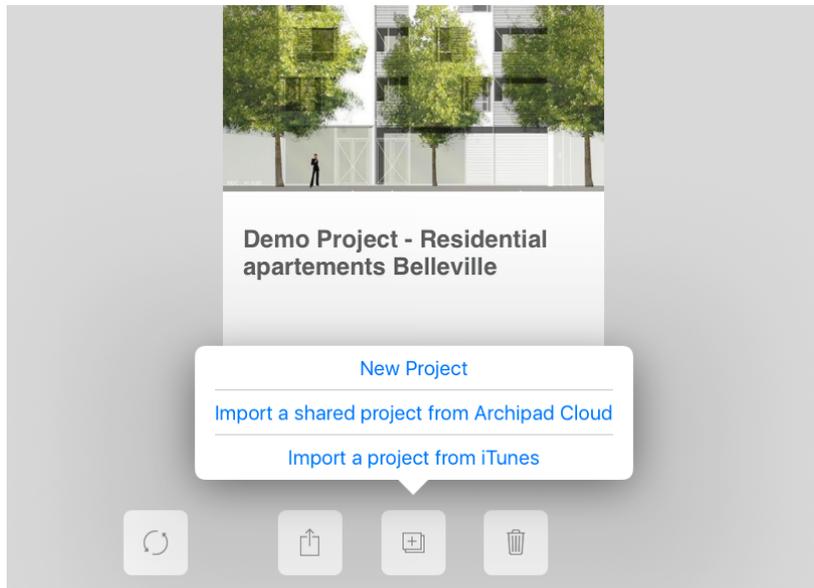
Make sure to use the Synchronize button in the top right of the screen to send your modifications to the cloud. Once your project with your forms is synchronized, you can import it on your iPad.



When you synchronize your project, each form definition that you have created or modified will respectively be added or update a previous definition of a form. Any person with whom you have shared the project will have access to the new form definition. Any form definition that was updated will not impact previously created forms based on that definition. So you can remove or add fields to a form definition, and any form that was already filled out, will not be impacted by the change. Only new forms will use the modified form definition.

Import or synchronize a project on your iPad

Now that you have created and synchronized your project in the cloud, it's time to import your project on your iPad.



If you have not yet connected your iPad to your Archipad account, this would be the first step. Your identifier for Archipad on your iPad and on our web site is the same and uses the same password.

Open Archipad App on your iPad and select Import a shared project from Archipad Cloud. A list with the available projects to import will show. Projects already imported on your iPad are shown in gray with an iPad icon. Select your project, and tap the Done button at the top right of the list.

If your project does not show in the list, most likely you are not using the same account which created the project. If you want to use another account, make sure that you shared the project with this other account.



After you imported your project, use the Synchronise button to send your changes to the cloud, and receive changes made by

Create a new meeting in Archipad App

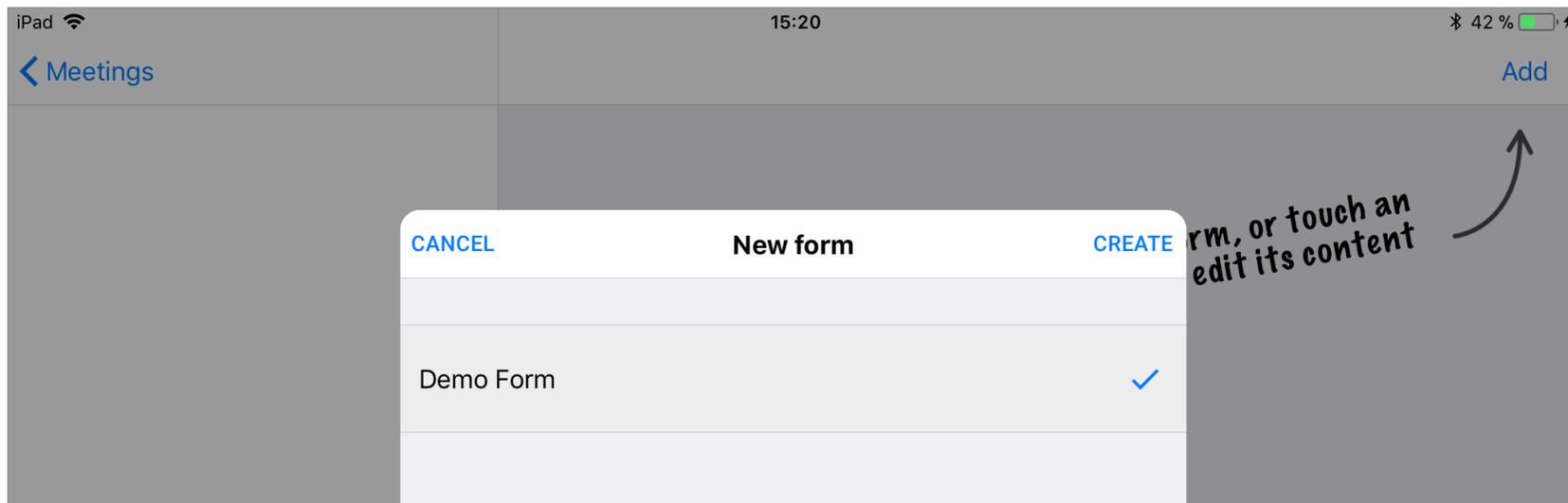
Archipad tracks changes made to your projects based on meetings, and can generate reports that only contain information that was changed during a meeting. Meetings allow you to track in real time new information added, keep track of present sheets, and create reports that only contain information you modified during a particular meeting.

To create a new meeting, touch the New meeting button in the top right of the Site meetings screen. Archipad will create a new meeting with today's date where you will manage all the information related to this meeting, such as who is present, who is convened for the next meeting...

Create a new form

Create a new form by touching the New Form button in the top right of the Forms section. Archipad will show you a list of form definitions from which you choose what type of form you want.

The name for the form in the list on the left will be based on one of the fields in the form.



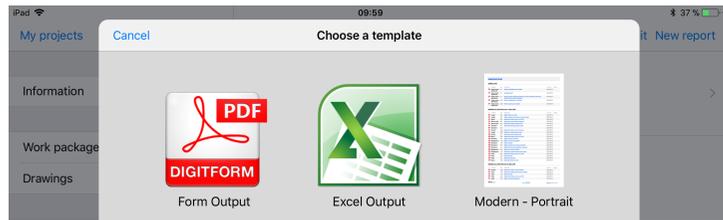
Fill out a form

The form you have just created will contain different fields to fill out. Just fill each field of your form with the correct data. You do not have to save each form when you are done, just move on to the next action you want to perform.

Generate a report based on a form

Depending on the kind of form, you most likely want to generate a report and send it out to the others working on the project, such as general contractors and subcontractors so they know what they have to work on.

Go to the Report section, and generate your report using the New report button in the top right of the screen. Then, rather than selecting the usual type of reports you are used to create, use the Form Output template, which has a red DigitForm icon.



Specify the name to give to the resulting PDF file in the **File name** field.

By default you can generate a report based on any of the forms you have defined, but you can limit the forms shown to a specific meeting date by selecting one of the dates in the **Meeting** field.

Before you can select the form to print, you must select the form definition to limit the number of forms shown in the list. Tap the **Form definition** field and select one of the forms shown.

Last, select the form to print from the **Form** field, and tap the [Generate report](#) button.



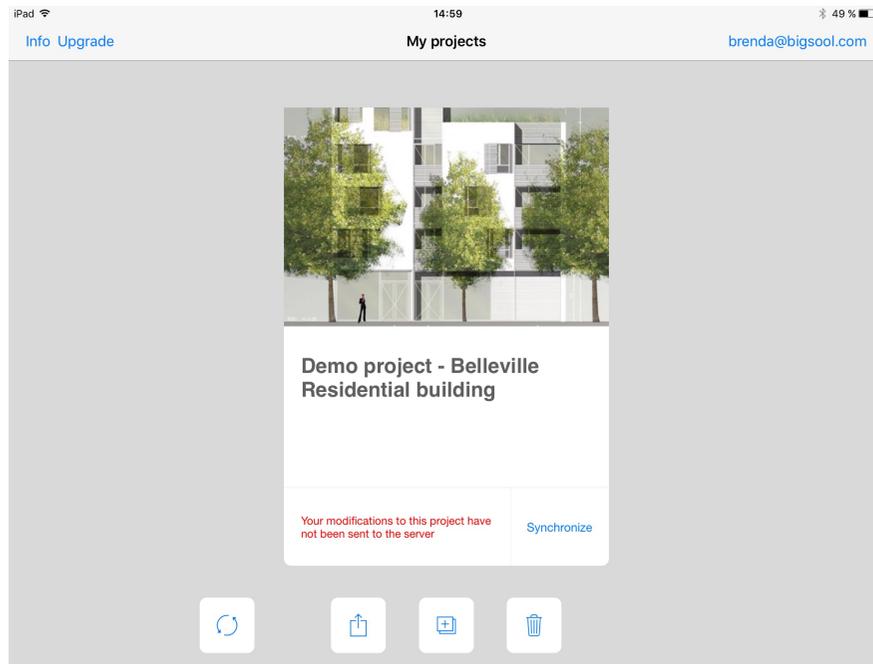
Share your report

Use the Share button to share your report directly from your iPad with others. Email the report, unless it is too large to send, in which case you share the report on Archipad cloud and send a link to it by mail. You can also print your report on an AirPrint compatible printer and hand out a printed copy on site.



Synchronize your work at the end of the day

After you entered and modified information, such as presence sheets, added new issues, marked existing issues as solved, filled out forms, you must synchronize your work to the Archipad cloud. Others that also work on the project will see your changes only after you synchronized your project. Synchronization also allows you to retrieve changes they made, so you can see what others did.



Use the  or Synchronize to synchronize your modifications to Archipad cloud.

Always make sure you synchronize your work back to Archipad cloud. Until you synchronize, you will not be able to see what you did on your iPad from your computer, nor will you be able to synchronize your work to another iPad.

And don't forget to charge your iPad

Make sure that your iPad is always ready for use, and charge it as soon as you are back from a field trip or when you are done using your iPad.

Use the USB power adapter and USB cable that come standard with your device. Connect your iPhone, iPad, or iPod touch to its Lightning to USB cable or Apple 30-pin to USB cable :

→ Wall power outlet

Plug your charging cable into a USB wall adapter, then plug the adapter into the wall.

→ Computer

Plug your charging cable into a USB 2.0 or 3.0 port on a computer that's on and not in sleep mode. Don't use the USB ports on your keyboard.

→ Power accessory

Plug your cable into a powered USB hub, docking station, or other Apple-certified accessory.



As your device charges, you'll see a lightning bolt beside the battery icon in the status bar, or a large battery icon on your lock screen.

For a more detailed description of Archipad, please download the Reference Manual free of charge from our web site at

<https://bit.ly/2ri1wRA>

