

Formulare

In menu point forms you have the opportunity to create custom forms, assign it to your vehicles and administrate transmitted data.

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Form research

In form research you can view already filled-in and transmitted forms and do research within them.

Research view

You can choose between three different views:

- summary
- detailed view
- scrollable view




The views differ by how they display the form data. In *summary* all form data is summarized into a single column. The *detailed view* sets one column per form field. Depending on the size of your form, horizontal scrolling might be needed. *Scrollable view* extends the detailed view by static columns. If you now scroll horizontally inside your table, all columns that don't contain form data stick to their static position, making you scroll only inside of form data entries.

You can change the view at any time.

Your preferred view which should be shown on starting the module can be set in the settings. Here you can also specify how many table rows should be shown per page.

All other controls are not altered by choosing a view.

Furthermore the form research has the following functions inside the Quickbar:

Quickbar controls		
	Export	Here you can export all form data as PDF, Excel or CSV. The current filter options are used to restrict the data.
	Set Quicklink	Set page as QuickLink.
	Help	Open help page in documentation.

Research by selectable search criteria

To filter within displayed forms, you can use the search on top of the page. Click on *show advanced search*, to be able to select other criteria besides free text search. Overall there are the following search criteria:



research form search criteria	
<i>free text search</i>	Using free text search you can filter inside the columns <i>vehicle</i> , <i>driver</i> , <i>form</i> and <i>form data</i> . The search item is used as a whole. Therefore it is not possible to search for catchphrases in multiple columns at once. To finish you input and apply the filter, click on the search button.
<i>research method</i>	Using research method you can search for specific status of a form. You can choose between <i>for filled forms</i> , <i>not sent by assigned vehicles</i> or <i>not filled in by driver</i> while the specified time range. (see <i>negative research</i>)
<i>time range quick selection</i>	Here you can choose between a set of predefined time ranges to restrict your result.
<i>time range manually</i>	Analogously you can also set your time range manually. To do so, set a start and finish date.
<i>form type</i>	Here you can restrict your search to a single form type. To undo this selection select the entry " <i>show all forms</i> ".
<i>vehicle</i>	Here you can restrict your search to a single vehicle or a vehicle group. To undo this selection select the entry " <i>show all vehicles</i> ". This search criteria is not available if you are currently searching for forms <i>not filled in by driver</i> .
<i>driver</i>	Here you can restrict your search to a single driver or a driver group. To undo this selection select the entry " <i>show all drivers</i> ". This search criteria is not available if you are currently searching for forms <i>not sent by assigned vehicles</i> .

All search criteria can be linked by a logically AND operator.

Within your search result you can also sort by a specific column. To do so, click on the head of the respective table column. Sorting by action column is not possible. You can only sort by form data, if you are currently filtering by a form type. In detailed and scrollable view you are prompted to pick a form type from the set of forms which were filled in the specified time range. In summary view you are prompted to pick the entry by which the table should be sorted.

Negative research

A negative research is characterized by the research methods not sent by assigned vehicles and not filled in by driver.

These methods create different table view than the method for filled forms. As columns there are only the vehicle resp. driver and the corresponding status shown. The status is distinguished between  not transmitted and  was transmitted. If there are no other filter options set, the system will check for each vehicle resp. driver if there were any forms transmitted while the specified time range or not. It is irrelevant if the vehicle has any forms assigned to it at all. If a specific form type was selected, only vehicles that have this form assigned will be taken into account. It is also possible to restrict the search to specific vehicles.

As forms can not be assigned to a driver personally, in this research method there will always be all drivers taken into account, as long as there is not a specific driver selected in the search criteria.

There are no different research views for the negative research.

Exports

You can export the research result of form and negative research. You can use the following formats:








- PDF
- Excel
- CSV

To export all forms you can use the control at the Quickbar. All filter criteria which are currently active will be used for the export.

To export a single form, click on the respective action in the action column or in the form details dialog. For single forms there is no CSV export possible.

Functions for single forms

You have different options to interact with single forms. Open the action menu in the action column of the table of the form you want to interact with. You can choose between the following actions:


actions		
	show form details	Shows all details and available information of the form.
	show on map	Shows the position at which the form was transmitted. If the form was created inside the portal or there was no GPS signal while transmitting, no position is available.
	edit form	Makes it possible to edit form data. You can not change information about the transmission (point of time, vehicle, driver) or the structure of the form.
	show stats	Shows the statistic of all transmitted forms with this form type. You can view a summary per form field. Depending on the form fields type different information can be shown.
	export form as PDF	Exports the selected form as PDF
	export form as Excel	Exports the selected form as Excel file.
	delete form	Deletes the filled form from the management.

Gather form inside portal

On top of the research table on the right side is the control *add form*.  By using this control, a form can be filled inside the portal.

First you have to choose the form draft, which should be used as template. Next the form data can be edited inside the form editor. You can choose the desired date, vehicle and driver.

If the driver identification or any other form field is mandatory, the respective field will be marked with an asterisk.

Forms that were created inside the portal are marked with  and the name of the portal user who created it after the form name inside the table view.



Form management

In form management it is possible to create form drafts, edit or delete them. These templates can be assigned to vehicles and be synchronized with them.

Overview view



For managing the form drafts there are two different views. There is the *form view* and the *vehicle view*. The assignments will be broken down according to the view and be differed in the available actions. To switch views please use the controls *forms* and *vehicles* right at top of the table header.

Both views have the same basic functionality. The controls on top number among. Beside a simple free text search, you can use the following controls:

controls		
	load data	Refreshes the data.
	create new form	Opens a dialog to create a new form.

If there are assignments at the moment which could not be synchronized with the vehicle, a hint will be shown additionally. You can start the synchronization of all these assignments by clicking on the hint.









Form management has also these functions in the Quickbar:

controls of Quickbar		
	set Quicklink	Set current page as QuickLink.
	Help	Open help page inside of documentation.








Form view

In form view all available forms will be listed inside a table. In the vehicle column there are all vehicles displayed, which have this form assigned. By looking at the design of the vehicle you can see the status of synchronization.

There are three different status:

vehicle status	
 DD-YF 001 	The form was successfully synchronized.
 DD-YF 002  	The form could not be transmitted. By clicking on the  symbol, you can restart the synchronization.
 DD-YF 003 	The form is still being transmitted.







By clicking the 'x' symbol on each vehicle, you can delete the assignment of this form for this vehicle. Furthermore there a bunch of different actions for single forms. Open the action control inside the action column. There are the following actions:

actions		
	vehicle assignme nt	Create an assignment of this form for specific vehicles.
	show this form	Show all available details and information of this form.
	edit form	Here you can edit the form draft. You can update the assignments afterwards.
	create a copy	Creates a copy of this form and opens it in the form editor. There you can edit the copy and give the form a name. Also all vehicle assignments are copied and for the copy are the same vehicles pre assigned like the source form.
	send assignme nts	Sends all created assignments of this form.
	delete assignme nts	Deletes all vehicle assignments.
	delete form	Deletes the form from management. Also the form is deleted from the assigned vehicles.

Vehicle view





In vehicle view the data will be sorted by vehicles. In form column all assigned forms for a vehicle will be shown analogously to the form view.

The status of forms is differed as followed:

form status	
 Formular Muster 	The form was sucessfully synchronized with this vehicle.
 Formular Muster  	The form could not be transmitted. By clicking on the  symbol, you can restart the synchronization for this vehicle.

<div> <div>Formular Muster</div> <div></div> </div>	The form is still being transmitted.
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




By clicking the 'x' symbol on each form, you can delete the assignment of this form for this vehicle. Furthermore there a bunch of different actions for single vehicles. Open the action control inside the action column. There are the following actions:




actions		
	edit form assignments	Opens a dialog to show all form assignments of this vehicle. Here you can add forms, delete them and change the order in which they should be shown on the display.
	send all forms	Resends all assigned forms to the vehicle.
	copy form assignments	Copy all assignments of this vehicle and assign them to a different vehicle as well. The old assignments of the selected vehicles will be overwritten.
	delete assignments	Deletes all form assignments of this vehicle.

Create a form draft

To create a new form, click on the control on the top left. A dialog will open where you can design your new form. This form editor is also used to edit an existing draft.

Choose a name for your form first. This is mandatory and must be unique among all your forms. Choose next, if the driver has to be authenticated to fill this form. Afterwards you can design your form inside the interaction area. Drag a form field type from the right to the interaction area or simply click on it to add it to the interaction area. There are the following field types:

form field types		
	selection	Selection between multiple options designed by you.
	yes/no	Field that can be selected or deselected.
	date	A date in the format dd.mm.yyyy has to be entered.
	time	A time in the format HH:MM has to be entered
	text 10 characters	Enter a text with 10 characters at max.
	text 30 characters	Enter a text with 30 characters at max.
	text 500 characters	Enter a text with 500 characters at max.
	integer	A number without a decimal place.
	float	A number with or without a decimal place.
	picture	A picture has to be taken by the device. (not supported by all displays)
	signature	A signature has to be set on the display.
	draft	It is possible to deposit a subform. A maximum number or a minimum number can be selected for this, how often it should be filled out on the display. The same applies to subforms as to individual/normal forms.

To edit a form field, hover with your mouse on the respective field and click on  *Edit*. Here you can edit the label of the field and set the field to mandatory or not. Depending on the field type there are other adaptabilities. To delete a field, click on  *remove element*. To create another field with the same configuration click on  *copy*. To change the order of fields, click on the respective field and drag it with pressed mouse button to the desired position. According to the display types you use in your company, there may be restrictions which field types you can use for your form draft and how many fields it can have.

To send a copy of a form after it was filled on a display to a mail address, you can enter mail addresses afterwards. You can choose an address from the address book or enter a new recipient. Click on *save and next* when you are done.

In the next step you can assign your new form to vehicles. Select the desired vehicles in the overview. Not every form draft can be assigned to every vehicle. The number of used fields and the field types limits the vehicle selection to compatible vehicles. If you do not want to assign the form to any vehicle right now, simply click on *create assignments*. This is necessary to save your new form. Closing or canceling the dialog in this step will lead to losing your form!

After confirming, your new form will be saved and sent to the vehicles where applicable. You can now close the assistant.

Draft assignment

You can assign a draft only to vehicles you have rights for and which have a compatible display. The count of used fields limits the vehicle selection like the used field types and if a driver has to be logged in at the display. If you have no compatible displays for specific field types, you don't have the possibility to select these field types.

Settings

Common Settings

In common settings you can set your preferred view settings. Set the number of entries which should be shown in all tables per page and decide which view should be loaded on start of the form research.