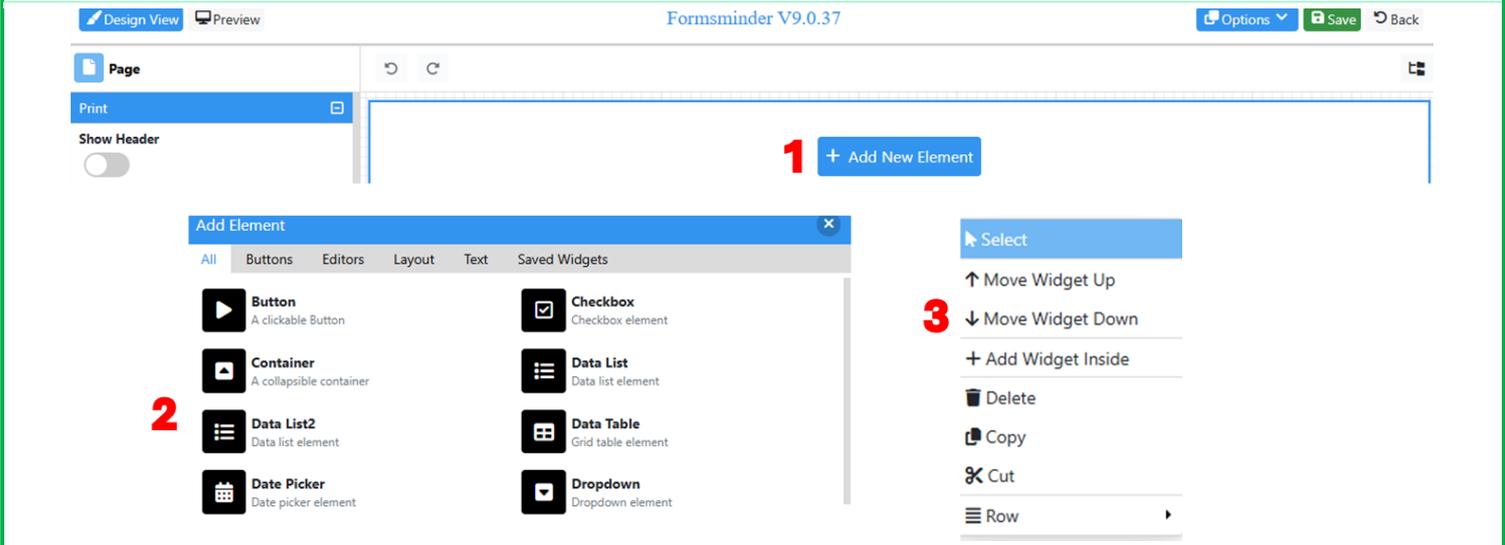
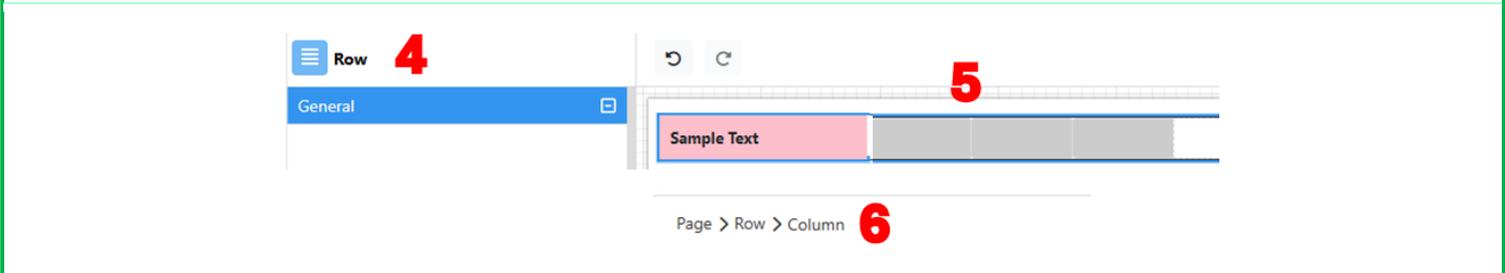




1. Clicking **+Add New Element** opens the widget selector.
2. From here you can add items like Checkboxes, Data Lists, Dropdowns, Image Uploaders, Signatures etc.
3. Once you have added an item you can right click on it and select an action.

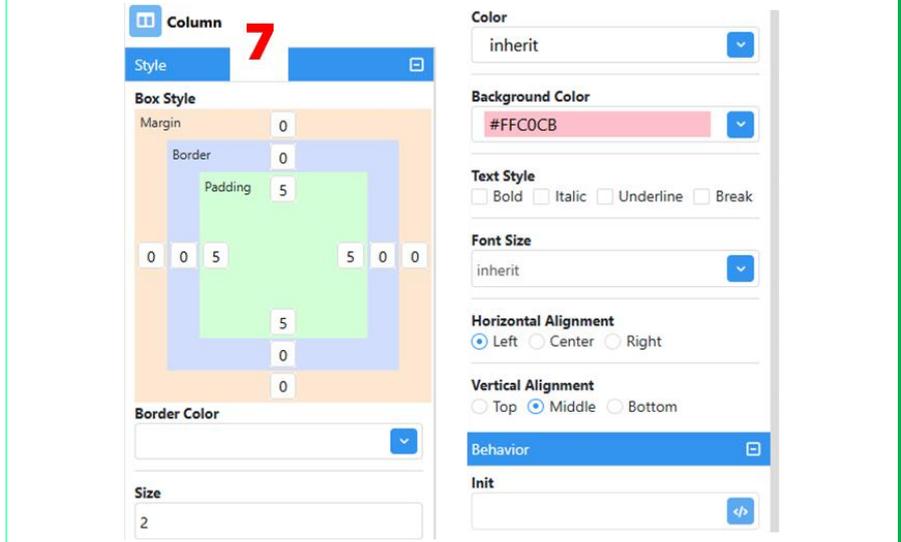


4. Generally, we put things into Rows or Tables. Rows are made up of 12 columns.
5. Highlight the boxes to select the number of columns. These will be displayed vertically in the mobile app.
6. At the bottom of the page you can click on the part of the element you want to edit.



7. This displays the editing functions for selected widget.

You can change margins, padding, fill a background colour and adjust alignment for here.

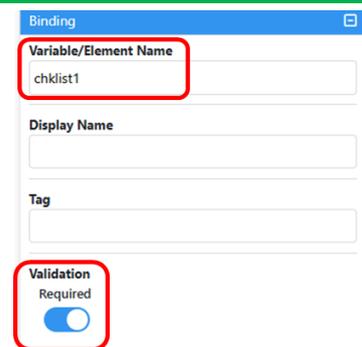


Variable Names & Mandatory Fields

This applies to any widget where the user will select data or enter information into a field e.g. text input, dropdown selection box etc.

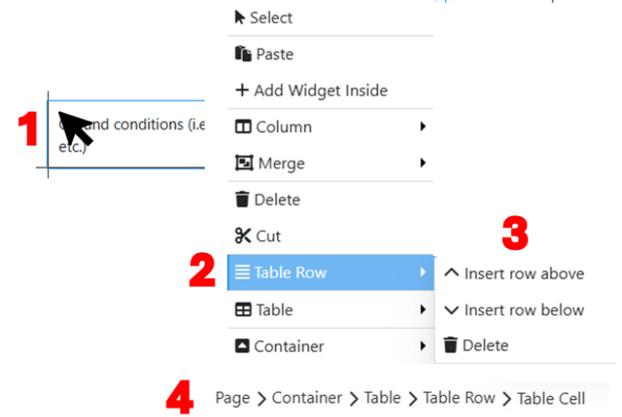
Each of these widgets **MUST** have **UNIQUE** variable names for the data to save when the job doc or register form is completed.

To make any of these widgets mandatory then toggle Validation Required on. E.g. data must be entered or an item chosen.



Edit Tables

1. Hover over a cell till you get the arrow & right click.
2. Further down you can hover on Table Row.
3. From the menu then select the options to Insert Above, Below or Delete.
4. On the bottom menu you can also click on the various components of the table to format them, as per screen shots below



Editing Text Boxes

1. Click on the text box.
2. Click **EDIT** to expand and see all the text.
3. Make your changes, use the tools to bold, underline, highlight etc.
4. Click to close and save the list.

You can copy and paste text from other documents into the text box. Where the form has already been formatted, highlight the text you wish to replace right click and select Paste as plain text.

Repeaters

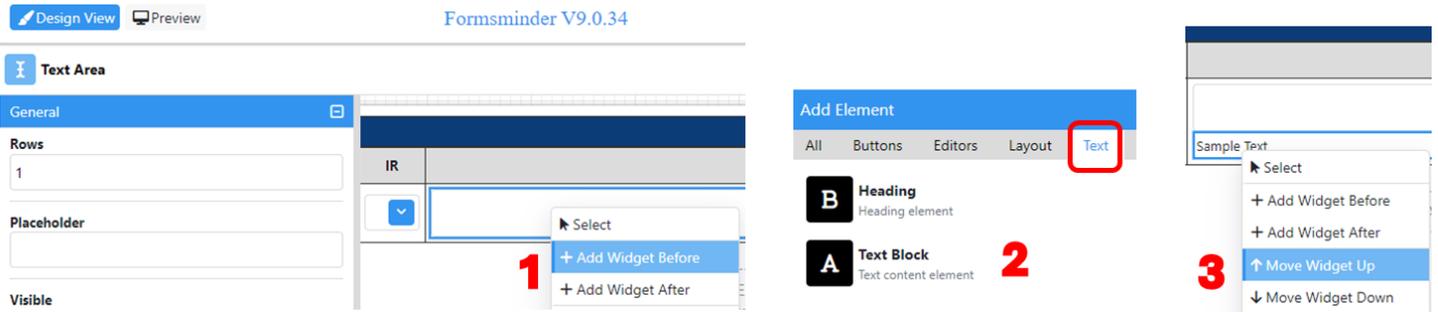
These are used where you want the user to run thru a check list of items or add multiple lines with the same data e.g. Vehicle inspection checklists or extra steps in a SWMS document.

1. These are found on the Layout Tab.
2. Clicking on Repeater at the bottom of the page will open the options.
3. Allow Add Item: used for adding multiple line entries for users to fill in e.g. extra steps in a SWMS document. **NOT** to be used when using datalists e.g. vehicle check list.
4. Delete Item: user can delete the row or item when completing the form in job docs.
5. Responsive: shows the table vertically in mobile app.
6. Visible: should always be selected.
7. Show Header: shows a header row. This should be selected before adding columns.
8. Clear on copy: used from Job Docs/Completed where you may wish to redo the form.

You can now right click on a field to insert columns as required and add widgets into each column as per below.

Add Widget into a table or repeater

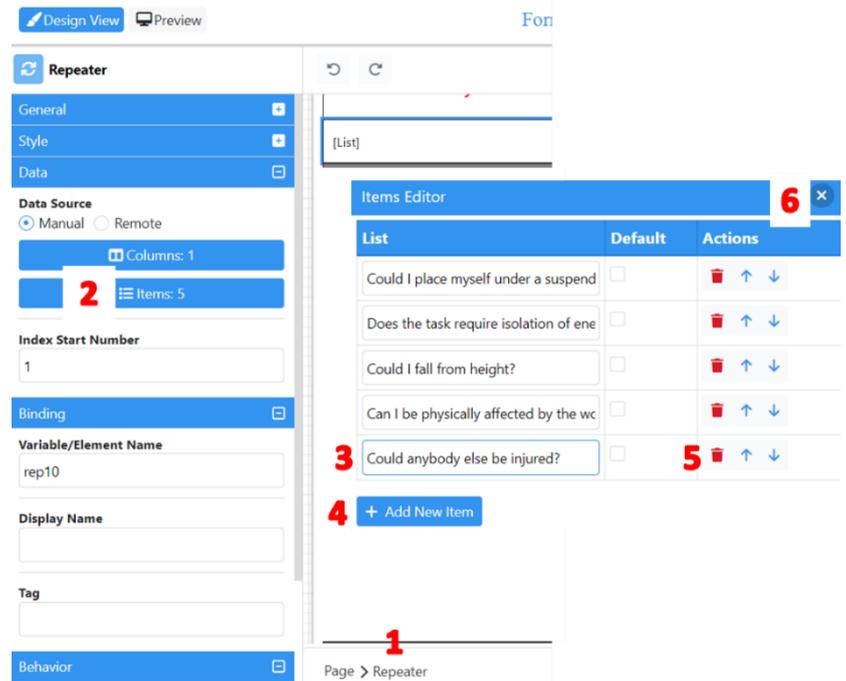
1. Right click an element and select +Add Widget Before or After.
2. From the Add Element click Text & select Text Block. You can now edit the text box as per below.
3. If you're text box is in the wrong place you can right click on it and move it up or down.



Repeater Items:

These are used when you have a list of items that need to be checked off.

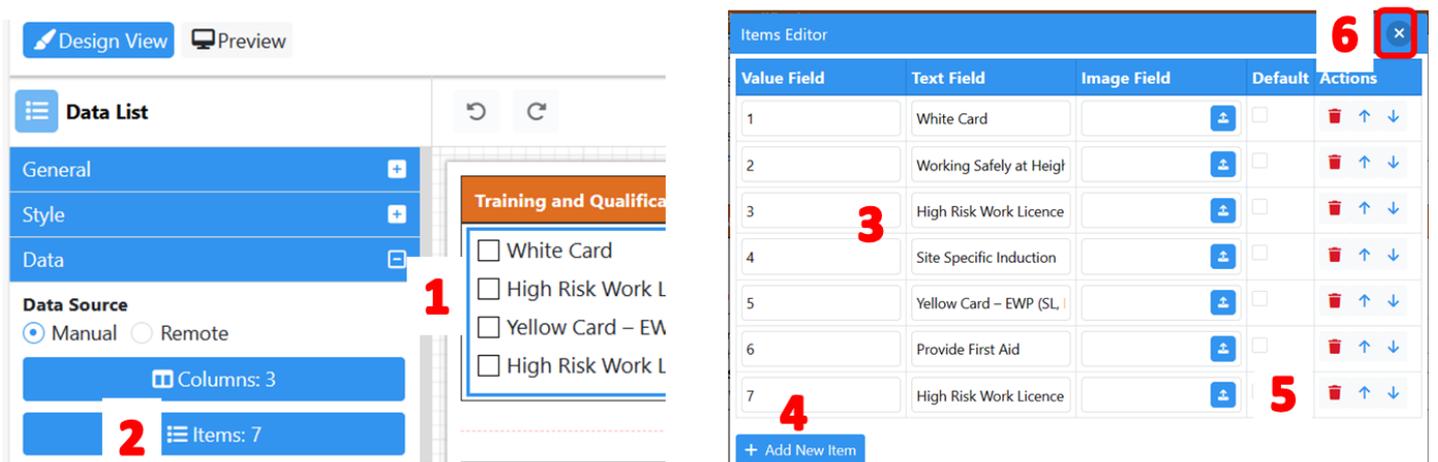
1. Select the item, click on Repeater along the bottom bar.
2. In the Data section click **Items**.
3. Amend the text in the Items Editor.
4. To add items click **+Add New Item**.
5. Use the buttons, to delete items and move them up or down the list.
6. Click to close and save the list.

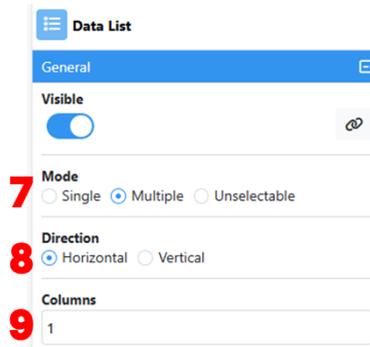


Data List Edit

Manual Lists:

1. Click on the List.
2. In the Data section click **Items**.
3. Amend the text in the Items Editor.
4. To add items click **+Add New Item**.
5. Use the buttons, to delete items and move them up or down the list.
6. Click to close and save the list.





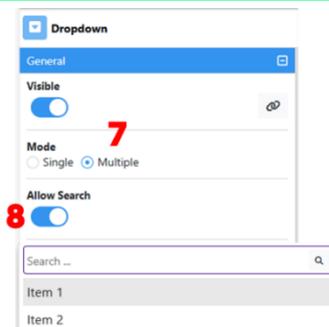
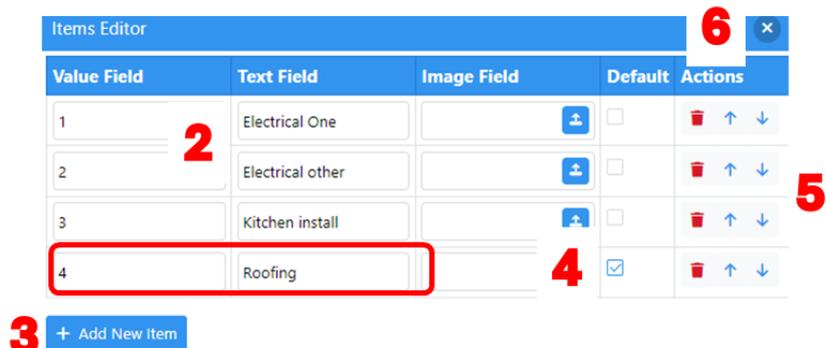
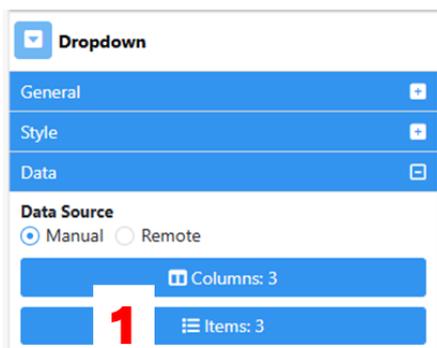
Under the General Section:

7. Mode: user can either select a single item or multiples.
8. Direction: Horizontal (across the page) or Vertical.
9. In Horizontal mode you can select the number of columns to print.

Dropdown Data List

Manual Lists:

1. Click on the widget, in the Data section click **Items**.
2. Amend the text in the Items Editor.
3. To add items click +Add New Item.
4. If you want an item to show by Default, tick this box. In the Job Doc this item will automatically be displayed.
5. Use the buttons, to delete items and move them up or down the list.
6. Click to close and save the list.



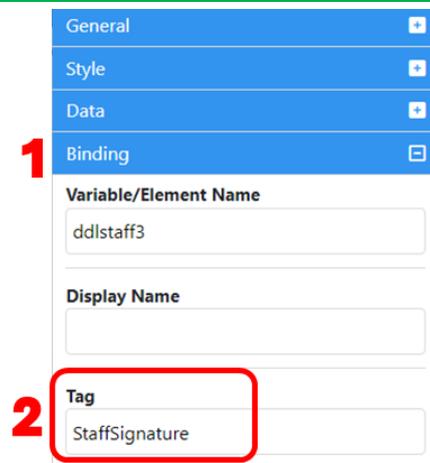
7. In the General section Multiple allows the user to select more than one option, good for staff lists to show everyone in attendance.
8. Allow search will show a search box for the list, good for lists with a lot of options.

Sign Off Tab Fields

To configure a field for completion on the Lock tab, click on the widget:

1. Scroll down to Binding section.
2. In the Tag box type in: StaffSignature complete with capital letters.
3. Do this for each widget that needs to be completed after the form is locked.

In reverse to make the fields available in draft mode then remove the text from the Tag box.



Signature Widgets – Auto populate Date

1. In the Behaviour section click `</>` and paste this:
#txtSignDate.setDateTime()
2. Next add a Text Input widget, make the Variable/Element Name:
txtSignDate
3. Remember if there are multiple dates required each one needs a unique variable name, which means the formula also needs to be changed e.g. #txtSignDate1.setDateTime() & txtSignDate1

The screenshot shows the Formsminder V9.0.34 interface. The form is titled 'PRE-START MEETING FORM' with Document ID 'BGES-F06'. The form contains several sections: 'List any Safety Concerns', 'Today's Weather is:', 'Today's Work Is:', 'Newly Identified Hazards Are', 'Control Measures Are', 'Check List', and 'Attendees'. The 'Attendees' section is a table with columns for 'Name', 'Signature', and 'Date & Time'. A signature widget is placed in the 'Signature' column, and a text input widget is placed in the 'Date & Time' column. The signature widget's behavior is set to 'On Signed' with the formula '#txtSignDate.setDateTime()'. The text input widget's variable name is 'txtSignDate'.

Copy Element from Form to a Widget or vice versa

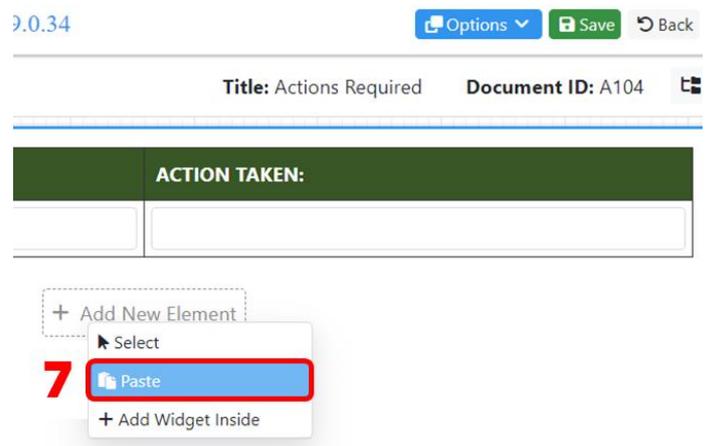
1. Right click on the element.
2. Scroll down to the item you want to select e.g. Table.
3. Select Copy or Cut from the menu, at the bottom of the screen you will see **Widget copied!**.
4. Click `⏪`BACK.
5. From the top menu select Administration/Templates/Widgets.
You need to stay on the same tab i.e. do not open in a new tab.

The screenshot shows the Formsminder V9.0.34 interface. The form is titled 'FIT OFF' with Document ID 'ROW-SWMS-CNS104'. The form contains a table with columns for 'Personnel Qualifications and Experience', 'Personnel Duties and Responsibilities', and 'Training Required to Complete Work'. A context menu is open over the table, and the 'Copy' option is selected. A 'Widget copied!' message is displayed at the bottom.

6. Open or create the widget where you want to put the element, click **DESIGN**.

7. Right click on **+ Add New Element** and select Paste.

NOTE: elements copied like this can only be pasted at the bottom, unless you put them into another element e.g. Row, Table or Container.



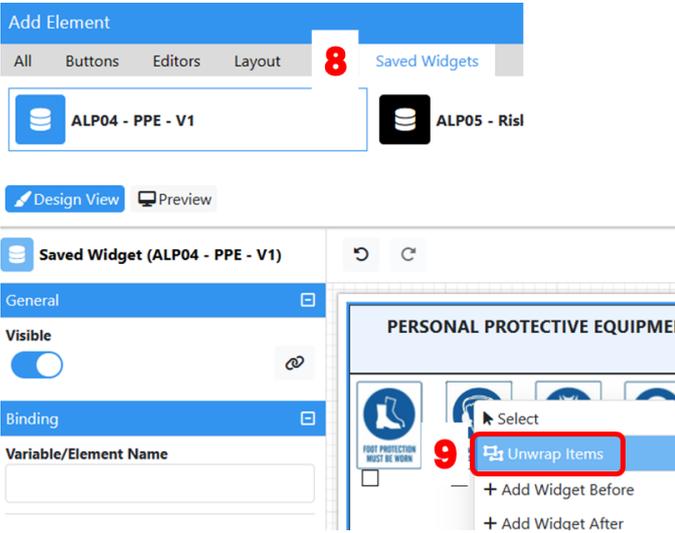
Alternatively in the template form:

8. Click on **+ Add New Element** & select Saved Widgets.

9. Right click on the Widget and select Unwrap Items.

10. Click YES to “Are you sure you want to unwrap this widget?”

NOTE: once the widget is unwrapped the elements are now permanently in the form and cannot be “re-wrapped” into a widget.



Editing Steps in Create Job Docs

Create the Job Doc as normal and click YES to complete it in the Web App. Click on the  steps button. This opens the job doc in Formsminder, items with Steps tags can be edited here.

1. Click on the grayed out Steps Widget and select Unwrap Items.
2. Click **YES**.
3. To edit text boxes click on the box and in the Text Block panel click EDIT (next to text box). Change the text as required.
4. Click X to save your changes.
5. When you have finished editing click **SAVE** and click OK. This will return you to the Create Job Docs Page.

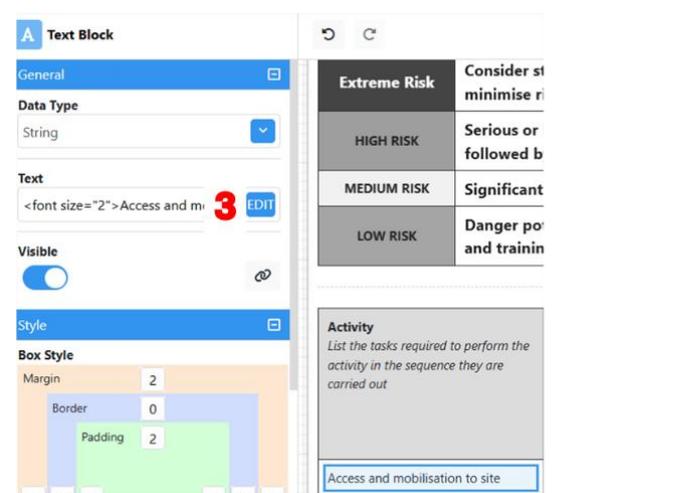
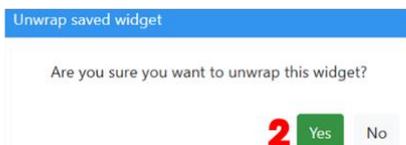
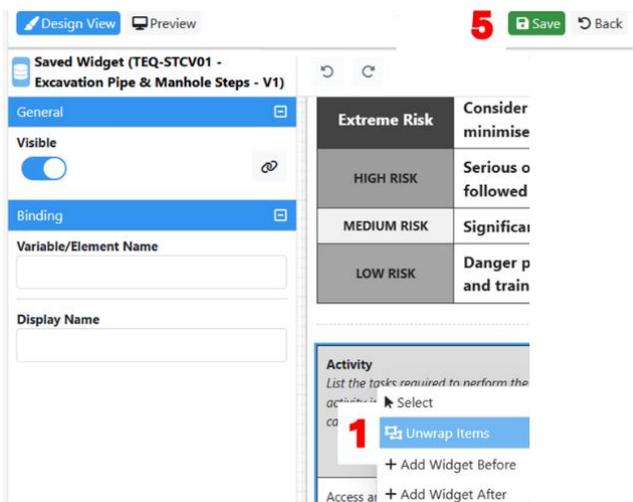


Image Uploader

1. Change Width & Height depending on size and orientation of image you want the user to add in the template form.
2. Give each widget a unique variable name.

NOTE:

- Widgets can be added to rows, tables or repeaters.
- The more images you add to a template form the longer it will take to save when it is completed in the mobile app.

The screenshot shows the configuration panel for an 'Image Uploader' widget on the left and its preview on the right. The configuration panel has two sections: 'General' and 'Binding'. In the 'General' section, the 'Visible' toggle is turned on. The 'Width(px)' is set to 270 and the 'Height(px)' is set to 180. A red '1' is next to the 'Height(px)' field. In the 'Binding' section, the 'Variable/Element Name' is set to 'img1'. A red '2' is next to this field. The preview on the right shows a form titled 'Add Photos' with two image upload buttons, each with a download icon and the text 'Click to Add Image'. A '+ Add New Element' button is at the bottom right.

Changing Formulas

1. Find the Data List you need to change and click on it.
 2. Under Behavior click on </> to edit the formula
 3. To change answer from Yes to No, replace 1 with 2, as shown.
- You will need to change both the Init & Value Changed formulas for this to work.

The screenshot shows the configuration for a 'Data List' widget. The 'Behavior' tab is selected. The 'Init' formula is `if(#txt7c)#txt7c.setVisible($dlrg && $dlrg.includ`. A red box highlights the code editor icon (a blue square with a white </> symbol) next to this formula, with a red '1' next to it. The 'Value Changed' formula is `#txt7c.setVisible($dlrg.includes("1"));`. A red box highlights the code editor icon next to this formula, with a red '2' next to it. The preview on the right shows a question: '7. Can you operate machinery if' with radio buttons for 'Yes' and 'No'. A red box highlights the 'No' radio button, with a red '3' next to it. Below the preview, the 'Expression' field shows the updated formula: `1 if(#txt7c)#txt7c.setVisible($dlrg && $dlrg.includes "2");`. A red box highlights the '2' in this formula. Below that, another 'Expression' field shows: `1 #txt7c.setVisible($dlrg.includes "2");`. A red box highlights the '2' in this formula.

