

PULSION TECHNOLOGY

# R2\_2\_0 eSquiggles Form Design

R2\_0 Overview and Instructions

# INSTRUCTION MANUAL

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# Introduction

This Instruction Manual has three distinct sections.

- Introduction to Forms Design gives an overview of what can be achieved with the eSquiggles Form Design Tools
- eSquiggles Form Design Instructions is a detailed set of instructions on how to build Forms for the mobile devices
- Microsoft Word Document Template Design Instructions is a detailed set of instruction on how to build Word Templates for the formal reporting of job findings

# Introduction to Forms Design

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## Overview of Forms Design Process

eSquiggles Forms are the electronic equivalent of the paper forms field workers fill out when they undertake jobs or inspections. With eSquiggles, instead of using paper, the field worker records the required data using an eSquiggles Form that will run on mobile devices such as laptops, notebooks, iPads, iPhones, Android smart phones and Android tablets.

The data collected on the mobile devices is synchronised with the central eSquiggles database. From the web based administration centre, eSquiggles can create formal reports and hardcopy records of the jobs or inspections using Microsoft Word<sup>1</sup>. The Microsoft Word documents can easily convert to a PDF or other format for sending to clients.

eSquiggles provides simple tools to design Forms and corresponding Microsoft Word document templates for the formal reports.

## Published and Unpublished Forms

eSquiggles Forms have two states, Published and Unpublished. Published Forms are Forms that are available for assignment to jobs. Unpublished forms are not available for assignment of jobs.

You can work on the design of Unpublished Forms until they are ready for testing or use. When you are satisfied that your design meets your data capture needs, publish the Form and it is ready for use.

eSquiggles Form design support multiple Form versions using the Published and Unpublished states. If you need to change a Form format or create a variant version for different jobs, you can copy any existing Published Form. eSquiggles will create a new Unpublished copy which you can name as an alternative Form or add a version number to a replacement Form.

When you need to replace a Form with a new version, you may want to stop assignment of new jobs to the old version of your Form. Once you assign a job to a Published Form, you cannot delete the Form because the existing jobs need to know the version of the Form at the time of data capture. To make it unavailable for future use, you simply Unpublish it. The original job can still access the old Form format, but you cannot assign new jobs with the old format. When you Publish the new version of the Form this is used for all new jobs.

## Good Practice Guidelines for Form Design

Good form design for any data capture requirement requires thought and preparation. We have all experienced difficulty completing a form that is poorly constructed or unsuitable for our needs. Online forms on websites illustrate the greater negative effect of poor electronic form design.

eSquiggles Form Designer will help you consider good practice and the effect of your form design on the end users, your field workers. Your field workers need to capture all the required data in the most efficient way possible. They need well-structured eSquiggles Forms to make the job of data recording as easy as possible.

Start by designing your Form as if you were designing a paper Form. If you already have an existing version of the required Form then you can start with a copy of the electronic version of the Form. If possible, work with a copy of the Form in Microsoft Word as this may save time if you need to create a Word document template later.

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<sup>1</sup> Currently eSquiggles can support Word 2003, Word 2007 and Word 2010

Arrange your Form into different sections of data considering all of the following points:

1. Consider each piece of information as a single data item or group of data items.
  - a. Is the data item a single piece of information that you have no need to break down further? For example: the date the Form was completed.
  - b. Is this data item connected to other items of data in way that it does not make sense on its own? For example: lines of a property address.
  - c. How finely do you want to break down the item of data? For example: do you want to store someone's name in full or broken down as title, forename, surname etc., thus making a data item group.
2. Consider the data item type. Refer to Table of Question Types.
  - a. Is it always a number?
  - b. Does it have a set of valid values that never vary?
  - c. Is there validation required?
  - d. How much space does it need on the device to input the required information?
  - e. What is the shortest question you can ask to prompt for the correct input?
  - f. Would putting a title above a group of questions define the context of the questions and therefore shorten them? For example: A title of Client Information followed by Company Name, Contact Name, Telephone etc. puts the general contact information in the context of the client rather than any other person for which contact details might also be captured in the Form. It saves asking Client Company Name, Client Contact Name, Client Telephone etc. to make the distinction.
3. Consider how often you will need to enter each item of data in your Form.
  - a. Will you request the data item or group only once? For example: the date the Form was completed.
  - b. Will you request the data item or group several times? For example: you need to capture the same information about multiple assets in the same Form.
  - c. Are there data items or groups that you might need to use sometimes but not necessarily every time? For example: some questions might only be required if particular conditions are met.
4. Consider the best layout for the input of data. Refer to Grid Entity Creation.
  - a. Is the data a set of two or three values that would be easy to input in a grid format? For example: Serial Number, height, width. You must consider the screen width of the devices you intend field workers to use.
  - b. Is the data a set of more values than would suit a grid format for easy review but could not easily be input on your devices in a grid style? For example: Serial Number, then multiple data items relating to the asset.
5. Consider unnecessary repetition of the same information. Are you asking the same question many times where the answer will not change during the job? For example: the date of the inspection if all asset inspections have to be completed in the same visit (same job).
6. Consider what information you will already know that you could give to the field worker. For example: Are you assigning jobs at a specific address that you have in the eSquiggles central administration system? The address can be pre-populated on the data Form. It is useful information for the field worker but there is no need for them to have to fill it in what is already known.
7. Consider the order in which your field workers will want to input data. This may vary from the display order in a formal report. For example: if you have to produce a formal report for a client, the first page may include a summary of findings or a list of issues. Your field worker will not know these until the end of the job and probably the end of the data input. Therefore, it may be more efficient to prompt for a data item to present at the start of the formal report at the end of the job Form.
8. Consider the effect of each response. How would you want that response represented in a final report? For example: if you are asking about the condition of an asset and depending

on the response you want to make different recommendations, consider the responses you make available. Wherever possible, if a response will trigger some text in a report make sure you give the field work a fixed set of possible responses. Humans are very good at selecting answers from prose but computers are not.

9. Once you have considered all these points you will know:
  - a. exactly what you want to capture for each data item
  - b. what question you will ask as a prompt for each data item
  - c. all of your grouped data items
  - d. data items and groups you will ask only once
  - e. data items and groups which are optional
  - f. data items and groups that can be asked for many times but at least once
  - g. data items and groups that can be asked many times or not at all.
  - h. the most natural and easy to input layout for your grouped data items
  - i. an efficient prompting order for entering data.

## Applying Good Practice with eSquiggles Form Designer

### eSquiggles Form Options

#### Naming a Form

If you are using one of the eSquiggles compliance packages your system will come with a set of suggested compliance Forms that are pre-named to reflect the compliance regime. You may wish to alter some of these Forms to add additional data items of your own.<sup>2</sup>

Over time, you may also build up a library of forms for different job usage out with a compliance regime. The default name given to a new Form is:

New Form, today's date and time

You should replace the text "New Form" with something more meaningful to represent the purpose of the Form, typically relating to the job. The date and time can remain as a useful indicator of the Form version or you can replace it with your own versioning reference. For example: Home Inspection 1.1

If you are creating a revised version of an existing Form you need to copy the existing Form from the Published list and eSquiggles will create a new Unpublished Form named:

Copy of <original Form name>

You should replace the Form name with a suitable name and version number. For example: Home Inspection 1.2 or Home Inspection date time.

#### Length in Minutes

The Length in Minutes option allows you to set the typical time it should take a field worker to undertake the job and complete the Form. If you have the Resources feature activated the field worker's calendar reflects the time required for the job.<sup>3</sup>

#### Part Completion

Part Completion allows you to control whether or not a field worker has to complete every part of the Form before leaving a job. It is possible to force some Sections of the Form to have to be complete

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<sup>2</sup> Changes to Forms that remove compulsory compliance items are not recommended. Changes to standard compliance Forms should be carefully considered and are at the owner's risk.

<sup>3</sup> eSquiggles has a resource management and simple workforce planning features available. Please contact us for more information.

before submission of the Form. As long as all required answers are filled in, the job can be sent back to the web system even if only partially completed. Refer to eSquiggles Form Section Options.

## Contact Details

Contact Details is a radio button collection with the options:

- Required
- Optional
- Not Required

This setting will determine whether full contact and address details are required to be associated with the job. For the optional setting, a smaller set of contact details (name and phone number only) is optionally available.

## Automatically Complete

Automatically Complete allows you to set a Form so that overnight, after the completed Form is synchronised, eSquiggles will automatically change the job status for the job associated with the Form from "Mobile Form Completed" to "Completed". This can be useful if you do not require to quality assure jobs completed by field workers.

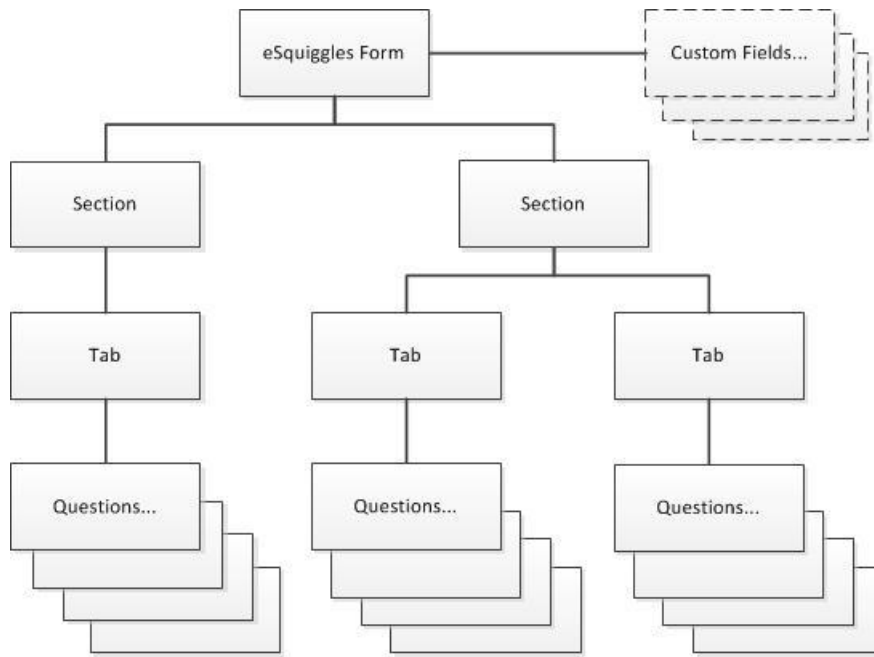
## Provisional Allocation

This feature allows a job to be allocated to a mobile user provisionally. Any user who can access the web system can confirm a provisionally allocated job. The job will not go to the user's mobile device until the allocation has been confirmed.

## eSquiggles Form Elements

Since many mobile devices have small screens, the structural elements of an eSquiggles Form make working on these devices as easy as possible. eSquiggles Forms are structured in a hierarchy containing the following elements:-

- Custom Fields
- Sections
- Tabs
- Questions



**Figure 1 Form Elements**

## Custom Fields

Custom Fields allow the user to input any extra information they need, for example, the extension of the standard eSquiggles Asset data set. The eSquiggles Asset data set holds all the information required to set up a compliance regime for an Asset. Different types of Asset have different characteristics that need recording as data items. For example: typical Custom Fields for a calorifier.

**Figure 2 Screen shot from eSquiggles Asset Register**

Where eSquiggles Compliance provides a regime for a particular compliance standard, the typical Custom Fields for the typical Assets covered by the compliance regime are already assigned Custom Fields.

eSquiggles allows for the addition of your own Custom Fields in the Forms Designer. The Custom Fields recorded on a mobile device also display in the Additional Details screen shown in Figure 2.

## Sections

An eSquiggles Form is made of one or more Sections. Each Section represents a logical grouping of data items within the Form. For example: an introductory Section and an inspection Section. The Sections names describe the content so it is easy to navigate on the mobile device to the appropriate Section.

The Sections have different settings that control whether groups of data can repeat, are optional or display in grid formats. Refer to eSquiggles Form Section Options for details.

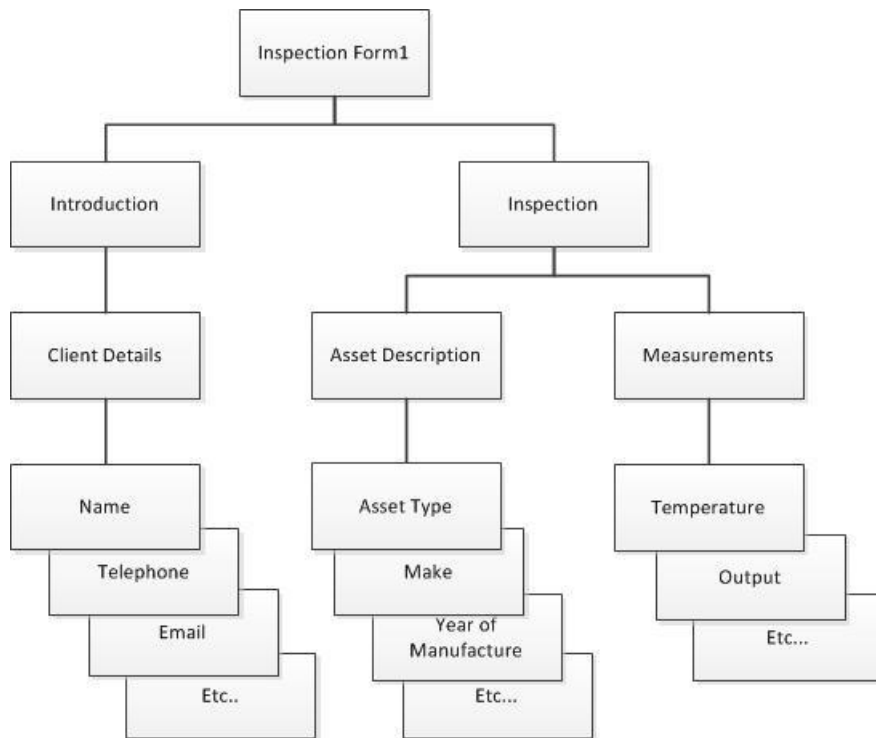
You can copy Sections to create new Sections that contain the same Tabs and Questions. This can be very powerful to save time when creating Forms with lots of similar Sections.

## Tabs

Each Section must have at least one Tab. Multiple Tabs allow the data content of a Section to be further broken down into smaller data groups. The Tabs display as tabs on the mobile device. The main purpose is to create small groups of data items within each Section to remove the need for scrolling up and down large forms. For example: If the inspection Section includes many data items, these can be grouped into two groups of related data items with one group in one Tab and the other in the second Tab. The Tabs names describe the content so it is easy to navigate to a Tab data group within a Form Section.

## Questions

Within a Tab, there are Questions. Each Question represents an element in the Form. A Tab must contain at least one Question. The Questions could be a heading, a prompt or any of the eSquiggles data input Question types. Refer to Table of Question Types for further details.



**Figure 3 Form Elements Example**

## eSquiggles Form Section Options

In the initial Form design, you considered data item groups that repeat one or more times in the Form, data item groups that repeat zero or more times in the Form, and groups that may look better displayed in grid formats.

eSquiggles handles these different requirements using settings for the Sections.

- Standard Section
- Repeatable
- Template Only
- Partial Complete Required
- Grid Entity Creation

### Standard Section

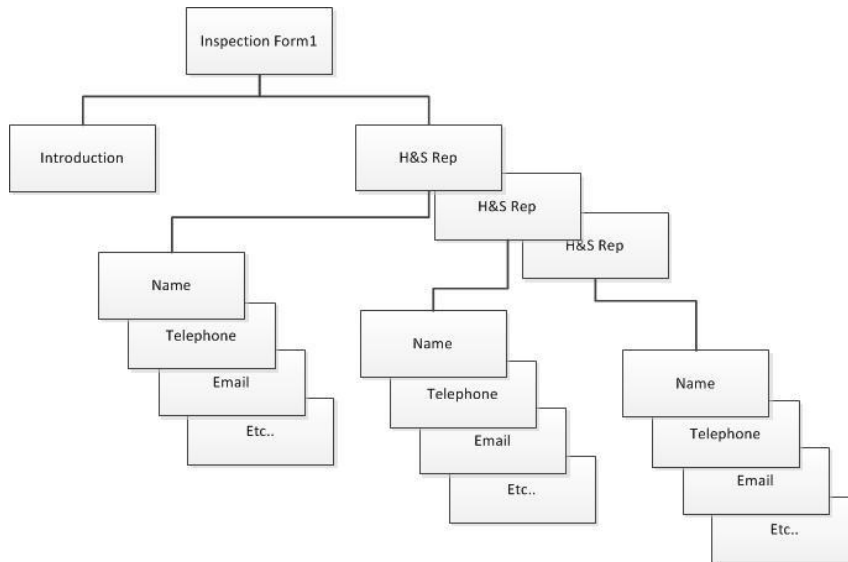
A Standard Section (just called Section in the application) is for data item groups that are always required and only once.

For example: a Section that captures the details of a person who signs off a job.

### Repeatable Section

A Repeatable Section is for data item groups that could be required multiple times. When the field worker has completed the Section there is an option to create another set of prompts to record the same type of information again.

For example: a Section that captures health and safety representatives within a company. There will always be at least one person but there may be others. Repeating the Health and Safety Representative Section will allow entry of the same type of information for each representative.



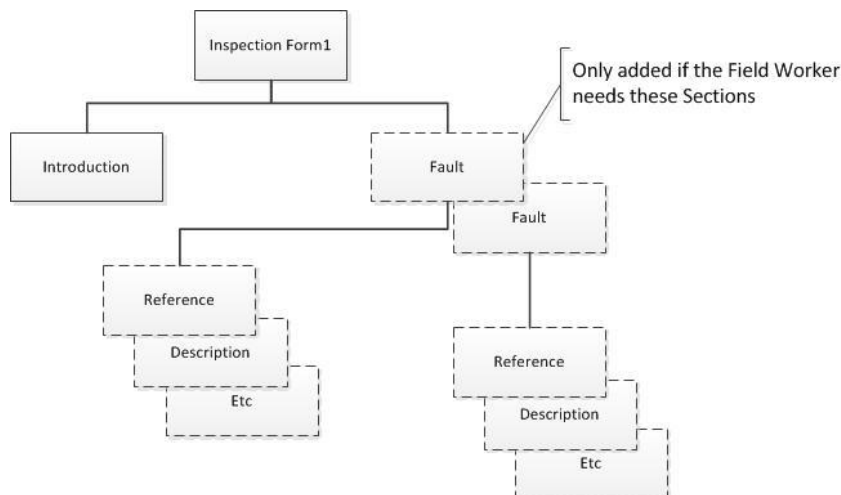
**Figure 4 Repeatable Form Section Example**

Refer to Group Fields for instructions on how to display Repeatable Sections in a Word document.

### Template Only Section

A Template Only Section is for data item groups that could be required multiple times or not at all. They must always be repeatable. When the field worker is using the Form he/she has the option to pick a Section configured as Template Only when it is required. Once the field worker has completed the Section there is an option to create another instance of the Section to record another set of the same type of information again.

For example: a Section that captures information about faults found during an inspection. There may not be any faults or there may be many. The optional and repeatable nature of the Template Only Section allows the field worker to adapt the Form to the situation.



**Figure 5 Template Only Section Example**

### Partial Complete Required

This setting is only useful when the Form setting Part Completion is checked. The Form setting Part Completion allows submission of an incomplete Form.

By checking Partial Complete Required within a Section setting, it indicates that this Section must be complete before submitting the Form.

If the Form setting Part Completion is checked and the Section setting Partial Complete Required is not set, then the Section is one that can be incomplete at submission.

## Grid Entity Creation

eSquiggles offers two ways to create grids on the device and to populate repeating data in Word Templates for formal documents.

If the repeating data is simple and does not have too many values, consider if it could be displayed in a grid format on the device. This will entirely depend on how the data will look visually on the device.

For example:

Description	Cold (°C)	Hot (°C)
Kitchen sink	10	30
Shower	8	40
Handwash basin	5	35

Such a small set of repeating data may be fine in using a Grid Question Type as this grid style will display within the width of the device window.

If the repeating data cannot display within the width of the mobile device then eSquiggles offers an alternative Section Grid option. A Section Grid consists of a Section that contains another Repeating, Template Only Section.

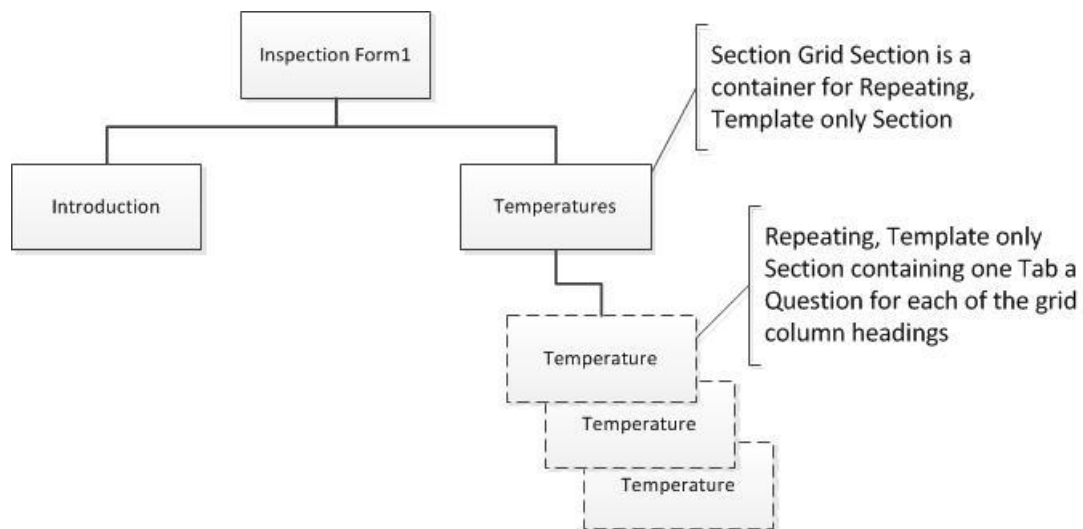


Figure 6 Section Grid

The Repeating, Template only Section contains all of the Questions that correspond to a column heading in the grid. Using the example data grid above, that would be Questions for Description, Cold and Hot.

The eSquiggles Microsoft Word Template component recognises the special Section Grid and renders the data into a repeating grid format. Refer to Section Grids for full instructions.

On the device, the user will see a row with the questions heading columns. To add a new row, they press the add button. They can add in as many new rows of information as they require. When the job is completed and rendered into a document, this information will appear in a grid.

## Microsoft Word Add-in Component

The eSquiggles Form Designer creates a Form Template suitable for use on a mobile device. You may use the same Forms for inspections and compliance testing for many of your clients. It is likely that your customers will expect a formal report of findings or you may be required to supply/keep a printed record for compliance audits.

To make this easy, eSquiggles provides an add-in component for Microsoft Word that allows you to format the report document and layout the data recorded from the job.

When starting out the design of an eSquiggles Form, there is usually a paper form already in existence. When creating a formal report template, eSquiggles recommends that you consider the Good Practice for Form Design points detailed above. Your existing paper forms may not be the optimal design for the automated production of documentation.

Other considerations are the use of Verbose values explained later in the document for the conditional inclusion of text depending on the job findings.

The Word document template<sup>4</sup> consists of your logos, images and standard text that must appear in every document. Placeholders in the template mark the position in the document to merge in the relevant data item.

When you merge data from a job into your document, save the resulting document in Word format or convert to PDF, which makes it more difficult to alter later.

Example from a Water Inspection Form:

All of the light grey text items are placeholders for information recorded in an eSquiggles Form.

## Section 2: Site Description

Client Details	Site Details
ClientCompany	ClientSite
ClientStreetNumber ClientStreet	SiteStreetNumber SiteStreet
ClientLocality	SiteLocality
ClientTown	SiteTown
ClientPostcode	SitePostcode
ClientPostcode	SitePostcode
Contact: ClientContact	Contact: SiteContact
Tel: ClientContactTel	Tel: SiteContactTel
Email: ClientContactEmail	Email: SiteContactEmail

## Calorifiers / Stored Hot Water

System reference	SHWSystemReference	
Location	SHWLocation	
Dimensions (metres)	HEIGHT	DIAMETER
	SHWHeight	SHWDiameter
Calorifier Capacity (litres)	SHWCapacity	Over storage? SHWOverStorage
Supplied From	SHWSupplied	

<sup>4</sup> Do not confuse with Microsoft Word Template types. An eSquiggles Word document template is a standard .doc or .docx file.

<b>Areas / Services Supplied</b>	<b>SHWAreas</b>		
<b>Make</b>	<b>SHWMake</b>		
<b>Orientation (vertical/horizontal)</b>	<b>SHWAge</b>		
<b>Method of heating</b>	<b>SHWOrientation</b>		
<b>Access to internal surfaces</b>	<b>SHWMethod</b>		
<b>Drain Valve Present Accessibility?</b>	<b>SHWAccessInternal</b>		
<b>Temperature on Gauge (°C)</b>	<b>SHWDrainvalvepresent</b>		
<b>Temperature of - Flow (°C)</b>	<b>SHWTempGauge</b>	<b>Return (°C)</b>	<b>SHWTempReturn</b>

Refer to Create a Word 2007 Document Template for more details.

# eSquiggles Forms Design Instructions

## Tools

### Tools > Form Designer

#### Forms List

Access Level Required: Company Administrator  
Office Administrator

Displays a list of all Published and Unpublished Forms and is the main control area for eSquiggles Forms and associated Microsoft Word Forms.

You can only assign Published Forms to jobs. You cannot assign Unpublished Forms to jobs.

Published Forms that have been assigned to jobs previously cannot be deleted but can be Unpublished so that no new jobs are assigned. Unpublished Forms that were previously Published and have old jobs assigned cannot be deleted. You can delete Unpublished Forms and Published Forms that have never had jobs assigned. It is also possible to delete a Published Form that has been used to Complete Jobs, but if there are any Incomplete Jobs using this Form, you will be unable to delete it. An attempt to Unpublish a Form that has jobs in progress (jobs allocated to a mobile device) but not complete will result in an error message similar to:

*“The jobs with external id(s) AA103BB, AA105BB, are not complete, to un-publish this form move these jobs to complete”*

The outstanding jobs must be completed or cancelled before the Form can be Unpublished.

### Published Forms





ID	Pinned	Name	Published Date	Published By	Templates	Un-Publish	Copy to Designer	Delete
4601	<input type="checkbox"/>	Citros HP	06 March 2012 15:11	dash test				
4362	<input checked="" type="checkbox"/>	Outlet (C)	30 March 2011 14:22	Raymond Booth				
4361	<input checked="" type="checkbox"/>	Outlet (H)	30 March 2011 14:22	Raymond Booth				
4360	<input checked="" type="checkbox"/>	Temp (C)	30 March 2011 14:22	Raymond Booth				
4359	<input checked="" type="checkbox"/>	Temp (H)	30 March 2011 14:22	Raymond Booth				
4358	<input checked="" type="checkbox"/>	WM Annual Review	30 March 2011 14:22	Raymond Booth				
4343	<input checked="" type="checkbox"/>	WM Tank Visual	30 March 2011 14:22	Raymond Booth				

### Unpublished Forms





Ref	Name	Last updated	Updated By	Templates	Publish	Edit Form	Delete
6134	New Form, 07/02/2012 14:30:25	07 March 2012 11:40	Martin Walmsley				
6141	New Form, 13/02/2012 14:28:21	13 February 2012 14:29	Martin Walmsley				
6142	New Form, 15/02/2012 11:49:50	15 February 2012 11:50	Martin Walmsley				

[New Form](#)

## Published Forms

-  Uploads a Word document template to associate with the Form
-  Move a Form from Published to Unpublished
-  Create an Unpublished copy of a Published Form, the Published Form remains in the Published list
-  Delete a Published Form

## Unpublished Forms

-  Uploads a Word Template to associate with the Form
-  Move a Form from Unpublished to Published
-  Edit an Unpublished Form
-  Delete an Unpublished Form

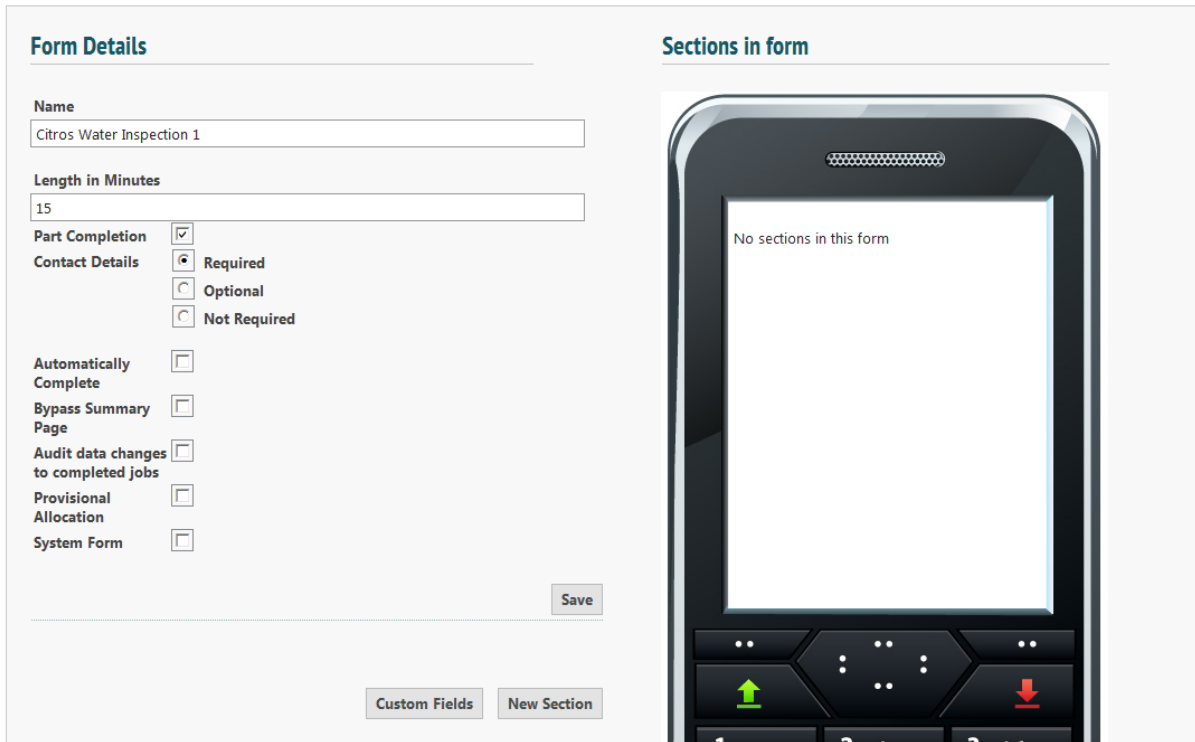
**New Form**

Creates a new Form

## New Form / Edit Form

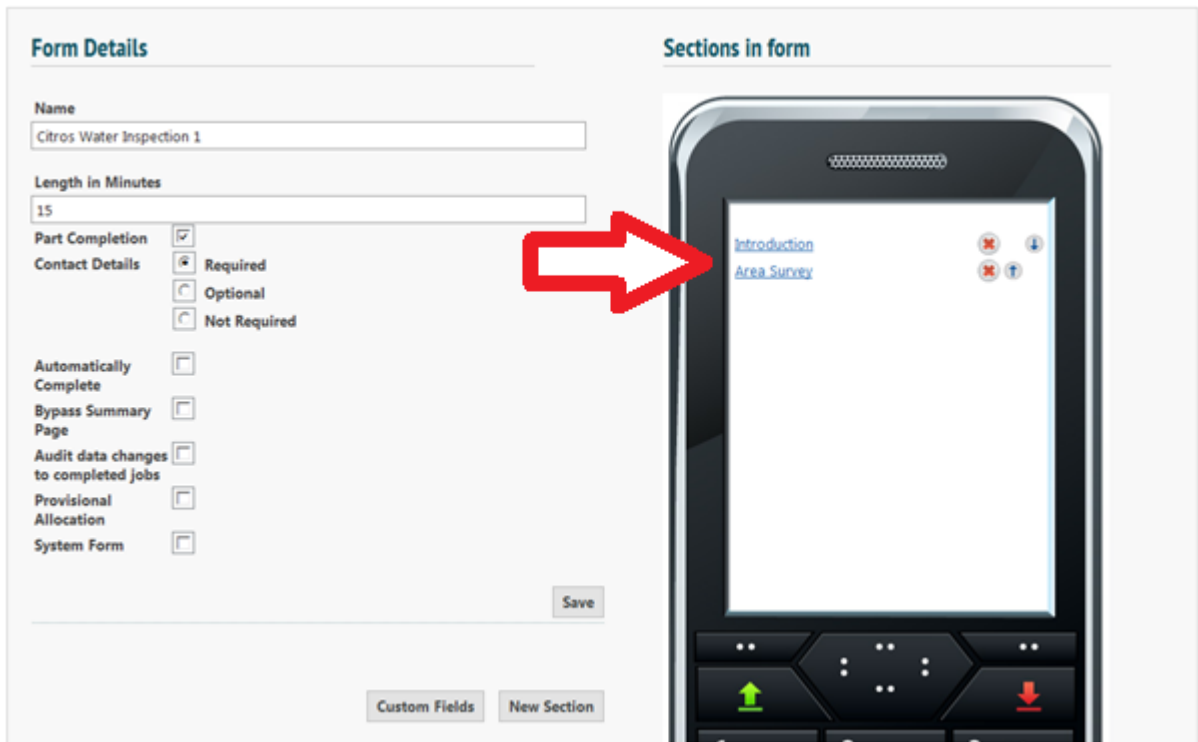
Access Level Required: Company Administrator  
Office Administrator

Data Item	Description	Mandatory	Validation
<b>Name</b>	Name of the Form	Y	Characters are restricted to what can be rendered on all devices (& etc. not permitted)
<b>Length in minutes</b>	Typical length of time to complete job	Y	Default is 15 mins, must be numeric
<b>Part Completion</b>	Allow part completion of Form		Checkbox
<b>Contact Details</b>	Are contact detail mandatory on Form	Y	Radio buttons
<b>Automatically Complete</b>	Set job status to Complete overnight from Mobile Job Complete		Checkbox
<b>Provisional Allocation</b>	This job can be provisionally allocated		Checkbox



Screen Reference FD.2.3 Release 2

When an existing Form already has some Sections defined, the Sections display in the device screen as links.



Screen Reference FD.2.3 Release 2

[Forms Designer](#) : Section List

Save

Breadcrumb with option to return to the Forms List screen

Saves the Form setting changes

## Custom Fields

Refer to Custom Fields

## New Section

Creates a new Section



Delete a Section (shown in device pane)



Move a Section one position down (shown in device pane), only shows if more than one Section defined




Move a Section one position up (shown in device pane), only shows if more than one Section defined

## Custom Fields

The Custom Field designer allows for the creation of multiple questions, in a similar manner to that of the main form designer. The purpose of these Questions is to allow for the provision of extra job information when a job is assigned to a mobile worker.

### Questions

### Details

Name	Type	Caption	Required	Actions
Temperature	numeric	Temperature	true	 

Add New Field

Back

## Screen Reference FD.2.3.4 Release 2



Opens the selected list item and allows you to Edit the details



Deletes the item from the list.



Moves the selected item down a position, only appears when more than one item in list



Moves the selected item up a position, only appears when more than one item in list

Add New Field

Creates a new custom Field

Back







Returns to the Form Designer

## Add New Field / Edit

Add New Field opens the Edit screen with the addition of another Question.

Data Item	Description	Mandatory	Validation
<b>Question Type</b>	Defines what type of data is to be input, text, number etc.	Y	eSquiggles Question type dropdown
<b>Question Name</b>	Name of Question	Y	Names must be unique and are not case sensitive
<b>Question Caption</b>	Question prompt to display on device	Y	
<b>Default Value</b>	Default value to be displayed on device	N	
<b>No. of Rows</b>	Number of rows for input on device	Y	
<b>Maximise this Control width on device?</b>	Checkbox to make max use of device screen width for the Control that displays the Question		Check box
<b>Required</b>	Is field entry mandatory?		Check box

## Questions

Name	Type	Caption	Required	Actions
Temperature	numeric	Temperature	true	  
Question2	textbox	Caption2	false	  

## Details

Question type:

Question name:

Question caption:





Default value:

No. of Rows:

Maximise this control width on device?

Required:

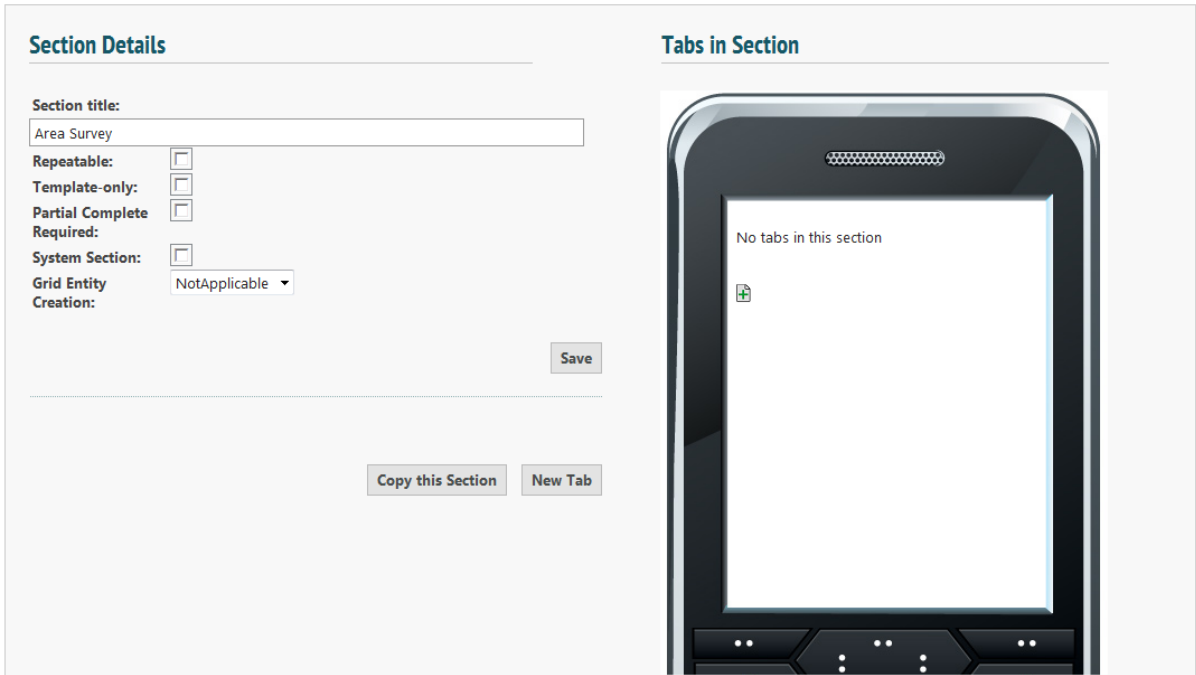
### Screen Reference FD.2.3.4.1 Release 2

	Opens the selected list item and allows you to Edit the details within the same screen
	Deletes the item from the list.
	Moves the selected item down a position, only appears when more than one item in list
	Moves the selected item up a position, only appears when more than one item in list
<input type="button" value="Save"/>	Saves your changes and returns to the Custom Fields screen
<input type="button" value="Cancel"/>	Cancels your changes and returns to the Custom Fields screen
<input type="button" value="Back"/>	Returns to the Form Designer

### New Section / Edit Section

Access Level Required: Company Administrator  
Office Administrator

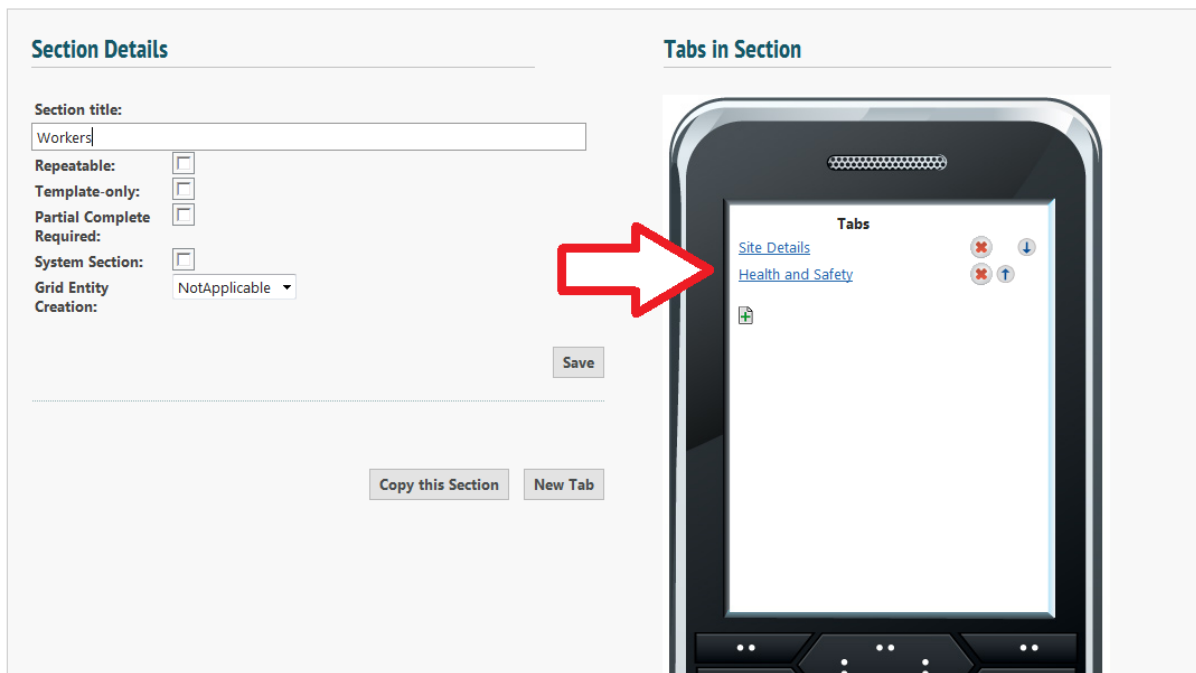
Data Item	Description	Mandatory	Validation
<b>Section Title</b>	Name of the Section as it will be displayed on the device	Y	Characters are restricted to what can be rendered on all devices (& etc. not permitted)
<b>Repeatable</b>	Can it be used one or more times?		Checkbox
<b>Template-Only</b>	Can it be used zero or more times?		Checkbox
<b>Partial Complete Required</b>	In a Part Completion Form, does this Section need to be completed?		Checkbox
<b>Grid Entity Creation</b>			Checkbox



Screen Reference FD.2.3.5 Release 2

Refer to Group Fields for instructions on how to display Repeatable Sections in a Word document.

When an existing Section already has some Tabs defined, the Tabs display in the device screen as links.



Screen Reference FD.2.3.5 Release 2

Forms Designer : Section List : Tab List Breadcrumb with option to return to the Forms List screen or Section List

**Save**

Saves your changes to the Section settings

**Copy this Section**

Creates a duplicate of the Section that contains a copy of all the Tabs and Questions within the Section

## New Tab



Creates a new Tab within the Section



Delete a Tab (shown in device pane)



Move a Tab one position down (shown in device pane), only shows if more than one Tab defined



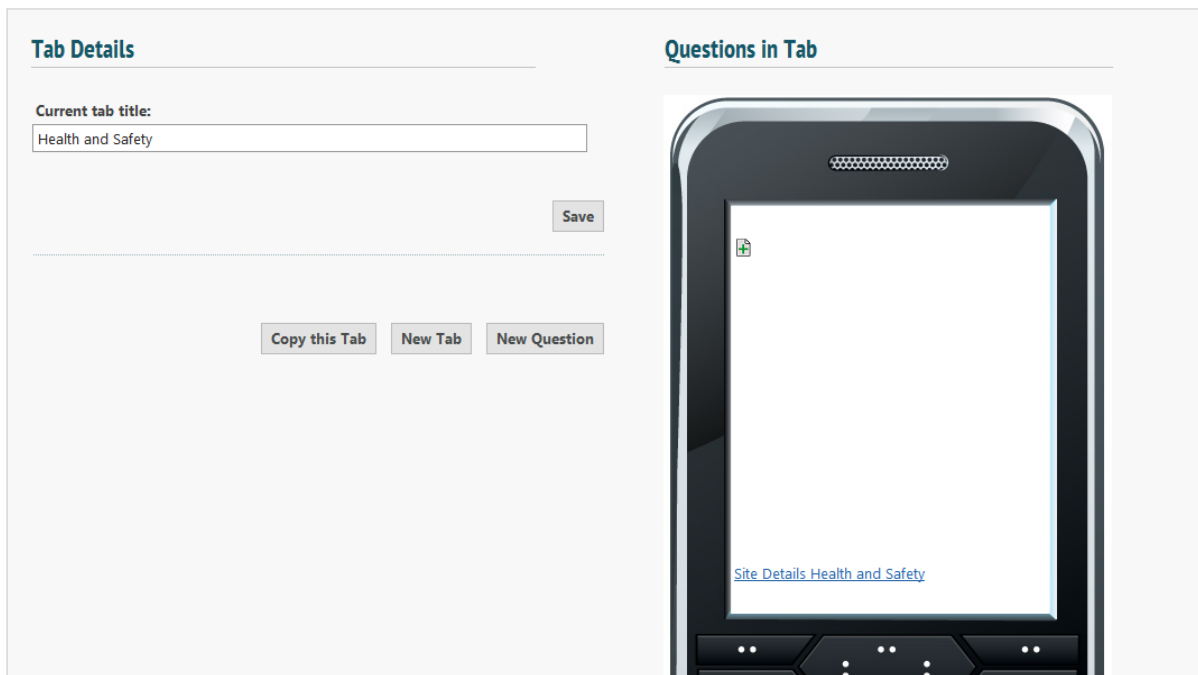
Move a Tab one position up (shown in device pane), only shows if more than one Tab defined

Creates a new Tab within the Section (shown in device pane)

## New Tab / Edit Tab

Access Level Required: Company Administrator  
Office Administrator

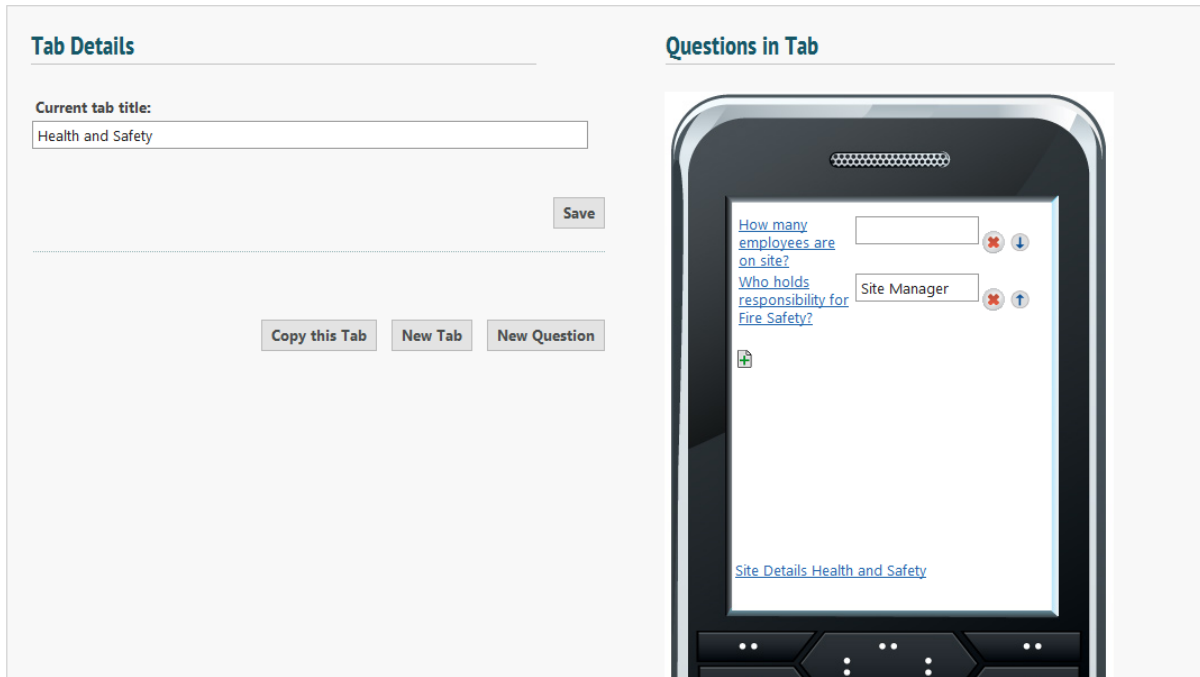
Data Item	Description	Mandatory	Validation
Tab Title	Name of the Section as it will be displayed on the device	Y	Characters are restricted to what can be rendered on all devices (& etc. not permitted)



Screen Reference FD.2.3.5.1 Release 2

When a Section has multiple Tabs, the Tabs show in the device pane. This allows for easy navigation between Tabs without having to return to the Section List and pick a Tab from the device pane links.

When a Tab has multiple Questions, the Questions show in the device pane.



Screen Reference FD.2.3.5.1 Release 2

<div style="border: 1px solid #ccc; background-color: #f0f0f0; padding: 2px; margin-bottom: 5px; width: fit-content;">Save</div> <div style="border: 1px solid #ccc; background-color: #f0f0f0; padding: 2px; margin-bottom: 5px; width: fit-content;">Copy this Tab</div> <div style="border: 1px solid #ccc; background-color: #f0f0f0; padding: 2px; margin-bottom: 5px; width: fit-content;">New Tab</div> <div style="border: 1px solid #ccc; background-color: #f0f0f0; padding: 2px; margin-bottom: 5px; width: fit-content;">New Question</div> <div style="display: flex; flex-direction: column; gap: 5px; margin-bottom: 5px;"> <div style="text-align: center;">✖</div> <div style="text-align: center;">↓</div> <div style="text-align: center;">↑</div> <div style="text-align: center;">+</div> </div>	<p>Device Pane Tabs</p>	<p>Saves your changes to the Tab title and shows the Tab in the device pane</p> <p>Creates a duplicate of the Tab that contains a copy of all the Questions within the Tab</p> <p>Creates a new Tab within the Section</p> <p>Creates a new Question within the Tab (data item to prompt for and input)</p> <p>Delete a Question (shown in device pane)</p> <p>Move a Question one position down (shown in device pane), only shows if more than one Question defined</p> <p>Move a Question one position up (shown in device pane), only shows if more than one Question defined</p> <p>Creates a new Question within the Tab (shown in device pane)</p> <p>Allow easy navigation between Tabs within the Section</p>
---	-------------------------	--

### New Question / Edit Question

Access Level Required: Company Administrator  
Office Administrator

The data items and settings displayed vary depending on the eSquiggles Question Type selected.

Data Item	Description	Mandatory	Validation
<b>Question Type</b>	Defines the Question Type	Y	See eSquiggles Controls list
<b>Question Name</b>	The internal name for the Question (is used for Word hardcopy template)	Y	Names must be unique and are not case sensitive
<b>Question Caption</b>	The prompt that appears on the device	Y	

### Tab Details

**Question type:** Numeric Value

**Question name:** Extinguishers

**Question caption:** How many fire extinguishers are on site?

**Default value:**


**Max:** 100

**Min:** 1

**Step:** 1

**Required:**

### Questions in Tab



The smartphone screen displays the following content:

- Link: [How many employees are on site?](#) (with a numeric input field)
- Link: [Who holds responsibility for Fire Safety?](#) (with a button labeled 'Site Manager')
- Text: How many fire extinguishers are on site? (with a numeric input field)
- Link: [Site Details Health and Safety](#)

Screen Reference FD.2.3.5.2 Release 2

**Save**

Saves your changes to the Question

**Cancel**

Cancels your changes and returns to the Tab details

## Table of Question Types

The following table details all of the possible Controls to ask a Question and input the data item. For example, some questions might require a free text input in response, other might expect a numeric value. The response may be limited to a range of possible values or upper and lower limits. The designs of some Controls are to make display on the device easier for the field worker.

For all Questions, you will require to pick the most appropriate Control for the type of response you want from the Question. Each requires a Question name that is the internal name of the Question for use in the Microsoft Word document template. Each Question also requires a Question Caption. The Question Caption is the prompt that will display on the mobile device. Refer to Summary of Terms for further information on Question names and captions.

The other Question configuration options vary depending on the Control assigned to the Question Type and are detailed below.

For examples of when to use each Question Type refer to Appendix B Question Type Examples.

<p>Text box</p> <p>Free format text input</p>	<p><b>Question type:</b> <input type="text" value="Text Box"/></p> <p><b>Question name:</b> <input type="text" value="Question3"/></p> <p><b>Question caption:</b> <input type="text" value="Caption3"/></p> <p><b>Default value:</b> <input type="text"/></p> <p><b>No. of Rows:</b> <input type="text" value="1"/></p> <p><b>Maximise this control width on device?</b> <input type="checkbox"/></p> <p><b>Required:</b> <input type="checkbox"/></p>	<p><b>Default value</b> – displays as a pre-filled value on the device</p> <p><b>No. of Rows</b> – Allows a textbox to have multiple lines of display on the device.</p> <p><b>Maximise this control width on device?</b> – this Control can expand across the device screen to give more space for input.</p> <p><b>Required</b> – Makes answering this Question mandatory. This setting overrides the Partial Complete Required setting in a Section and the Part Completion setting for a Form.</p>
---	---	--

<p>Numeric value</p> <p>Any numeric value</p>	<p><b>Question type:</b> <input type="text" value="Numeric Value"/></p> <p><b>Question name:</b> <input type="text" value="Question3"/></p> <p><b>Question caption:</b> <input type="text" value="Caption3"/></p> <p><b>Default value:</b> <input type="text"/></p> <p><b>Max:</b> <input type="text" value="100"/></p> <p><b>Min:</b> <input type="text" value="0"/></p> <p><b>Step:</b> <input type="text" value="1"/></p> <p><b>Required:</b> <input type="checkbox"/></p>	<p><b>Default value</b> – displays as a pre-filled value on the device</p> <p><b>Max</b> – Maximum number allowed</p> <p><b>Min</b> – Minimum allowed</p> <p><b>Step</b> – the amount the number increases / decreased when the up/down button is clicked. This is useful if numeric data items are recorded in 1000's etc.</p> <p><b>Required</b> – Makes answering this Question mandatory. This setting overrides the Partial Complete Required setting in a Section and the Part Completion setting for a Form.</p>
<p>Drop-down list</p> <p>Pre-populated of possible values to pick</p>	<p><b>Question type:</b> <input type="text" value="Drop-down List"/></p> <p><b>Question name:</b> <input type="text" value="Are temperature gauges f"/></p> <p><b>Question caption:</b> <input type="text" value="Are temperature gauges f"/></p> <p><b>Options (one line per option)</b> <input type="text" value="Yes"/> <input type="text" value="No"/></p> <p><b>Enable Verbose message at index</b> <input type="text" value="N/A"/></p> <p><b>Can users add their own text instead?</b> <input type="checkbox"/></p> <p><b>Maximise this control width on device?</b> <input type="checkbox"/></p> <p><b>Required:</b> <input type="checkbox"/></p>	<p><b>Options</b> – the options that appear within the drop-down list.</p> <p><b>Enable Verbose message at index</b> – up to 10 possible verbose messages per option. This number identifies which verbose message displays as additional help on the mobile device. Refer to Verbose values for more details.</p> <p><b>Can Users add their own text instead</b> – allows users to override and enter an “other” option</p> <p><b>Maximise this control width on device?</b> – this Control can expand across the device screen to give more space for input.</p> <p><b>Required</b> – Makes answering this Question mandatory. This setting overrides the Partial Complete Required setting in a Section and the Part Completion setting for a Form.</p> <p><b>Verbose Values</b> – Refer to Verbose values for more details.</p>

Section Choice Drop Downs

Question type:

Question name:

Question caption:

Options (one line per option)

Each item must match the name of a repeatable, templated section as the control will dynamically selected. The current available sections that match this criteria are: **None available**  
If you wish to alias a section name in the drop down please enter a colon ':' followed by the "Flat Exterior Details" and you wanted to display "Flat Ext" in the dropdown enter "Flat Exterior Details" and you wanted to display "Flat Ext" in the dropdown enter "Flat Exterior Details: Flat Ext"  
If you want to add an entry in the dropdown which doesn't tie to a section enter the word "r" would display "No" in the dropdown and not link to a section

Required:

**Options** – the options that appear within the dropdown list.  
**Required** – Makes answering this Question mandatory. This setting overrides the Partial Complete Required setting in a Section and the Part Completion setting for a Form.

**Verbose Values** – Refer to Verbose values for more details.

Section Choice Buttons

Question type:

Question name:

Question caption:

Options (one line per option)

Each item must match the name of a repeatable, templated section as the control will dynamically selected. The current available sections that match this criteria are: **None available**  
If you wish to alias a section name in the drop down please enter a colon ':' followed by the "Flat Exterior Details" and you wanted to display "Flat Ext" in the dropdown enter "Flat Exterior Details: Flat Ext"  
If you want to add an entry in the dropdown which doesn't tie to a section enter the word "r" would display "No" in the dropdown and not link to a section

Required:

**Options** – the options that appear within the dropdown list.  
**Required** – Makes answering this Question mandatory. This setting overrides the Partial Complete Required setting in a Section and the Part Completion setting for a Form.

**Verbose Values** – Refer to Verbose values for more details.

<p>Label</p> <p>Text output on device</p>	<p>Question type: <input type="text" value="Label"/></p> <p>Question name: <input type="text" value="Question3"/></p> <p>Label Text: <input type="text" value="Caption3"/></p>	<p><b>Label Text</b> – The text that displays within the label. This is for titles or general information that displays on the device.</p>
<p>Check-box</p> <p>True/False values</p>	<p>Question type: <input type="text" value="Check-Box"/></p> <p>Question name: <input type="text" value="Question1"/></p> <p>Question caption: <input type="text" value="Caption1"/></p> <p>Default value: <input type="checkbox"/></p> <p>Options (one line per option, max 2 options)</p> <div style="border: 1px solid gray; padding: 2px;"> <p>Yes</p> <p>No</p> </div>	<p><b>Options</b> – the options that denote the meaning of the box being checked and the box not being checked.</p> <p><b>Default value</b> – displays as a pre-filled checked or not checked on the device</p> <p><b>Verbose Values</b> – Refer to Verbose values for more details.</p>
<p>Radio button List</p> <p>Select from static options</p>	<p>Question type: <input type="text" value="Radio Button List"/></p> <p>Question name: <input type="text" value="Question1"/></p> <p>Question caption: <input type="text" value="Caption1"/></p> <p>Options (one line per option)</p> <div style="border: 1px solid gray; padding: 2px;"> <p>Yes</p> <p>No</p> </div> <p>Maximise this control width on device? <input type="checkbox"/></p> <p>Required: <input type="checkbox"/></p>	<p><b>Options</b> – the options that appear within the radio button group on the mobile device</p> <p><b>Maximise this control width on device?</b> – this Control can expand across the device screen to give more space for input.</p> <p><b>Required</b> – Makes answering this Question mandatory. This setting overrides the Partial Complete Required setting in a Section and the Part Completion setting for a Form.</p> <p><b>Verbose Values</b> – Refer to Verbose values for more details.</p>

<p>Date</p> <p>Date format set by device settings</p>	<p>Question type: <input type="text" value="Date"/></p> <p>Question name: <input type="text" value="Question1"/></p> <p>Question caption: <input type="text" value="Caption1"/></p> <p>Default Value: <input type="text" value="Blank"/></p> <p>Required: <input type="checkbox"/></p>	<p><b>Default value:</b> displays as a pre-filled value on the device. Blank, Today, "Today: Online only", "Today: Device only". Selecting "Today: Online only" selects the default date which will only show on line and not on the Device. Vice versa by selecting "Today: Device only".</p> <p><b>Required</b> – Makes answering this Question mandatory. This setting overrides the Partial Complete Required setting in a Section and the Part Completion setting for a Form.</p>
<p>Time</p> <p>Note that the current time (the computer or device time) sets by default.</p>	<p>Question type: <input type="text" value="Time"/></p> <p>Question name: <input type="text" value="Question3"/></p> <p>Question caption: <input type="text" value="Caption3"/></p> <p>Required: <input type="checkbox"/></p> <p>Time controls default to the current time.</p>	<p><b>Required</b> – Makes answering this Question mandatory. This setting overrides the Partial Complete Required setting in a Section and the Part Completion setting for a Form.</p> <p>Note that the current time (the computer or device time) sets by default.</p>
<p>Text Expander</p> <p>Choose a value from a Drop Down list with the option to expand on the answer</p>	<p>Question type: <input type="text" value="Text Expander"/></p> <p>Question name: <input type="text" value="Question1"/></p> <p>Question caption: <input type="text" value="Caption1"/></p> <p>Options (one line per option)</p> <div style="border: 1px solid gray; padding: 2px;"> <p>Yes</p> <p>No</p> </div> <p>Required: <input type="checkbox"/></p>	<p><b>Options</b> – List of possible text inputs to assign a corresponding verbose value</p> <p><b>Required</b> – Makes answering this Question mandatory. This setting overrides the Partial Complete Required setting in a Section and the Part Completion setting for a Form.</p> <p><b>Verbose Values</b> – Refer to Verbose values for more details.</p>

<p>Relational Label</p> <p>Allows for job related information held in eSquiggles to be pre-populated in the Form for display on the device.</p> <p>The purpose is to assist the field worker by providing as much useful information as necessary.</p>	<p><b>Question type:</b> Relational Label</p> <p><b>Question name:</b> Question4</p> <p><b>Question caption:</b> Caption4</p> <p><b>Current Value:</b></p>	<p><b>No. of Rows</b> – Allows a textbox to have multiple lines of display on the device.  <b>Maximise this control width on device?</b> – this Control can expand across the device screen to give more space for input.</p> <p><b>Choose Fields</b> –. Almost all information held in eSquiggles relating to the job is available to display in the Form on the device. The data items are grouped by the elements they relate to. The groups are: Work Item, Client, Contact Details, Asset<sup>5</sup>, Contacts and Custom Fields. For a full list of data items available please refer to Appendix A eSquiggles Bundled Data.</p>
	<p><b>No. of Rows:</b> 1</p> <p><b>Maximise this control width on device?</b> <input type="checkbox"/></p> <p><b>Choose Fields</b></p> <p><b>Cancel</b> <b>Save</b></p>	

<sup>5</sup> Asset information is only available for eSquiggles Compliance.

Relational Label Popup

Work Item

- Form Name
- Form Duration
- Scheduled Date / Time
- Allocated User
- Created By
- Job Status
- Job Ref
- Duration

Save

Parts List

Question type:

Question name:

Question caption:

Required:

Parts List:

Unknown Part code:

**Parts list:** List of parts possibly needed for job. Updates information on web system to correlate.  
**Unknown Part Code:** Manually enter a code for a part.

<p>Camera</p> <p>Capture still image</p>	<p>Question type: <input type="text" value="Camera"/></p> <p>Question name: <input type="text" value="Question3"/></p> <p>Question caption: <input type="text" value="Caption3"/></p> <p>Height (in pixels): <input type="text" value="250"/></p> <p>Width (in pixels): <input type="text" value="250"/></p> <p>Required: <input type="checkbox"/></p>	<p><b>Height (in pixels):</b> Restricts the height of image.</p> <p><b>Width (in pixels):</b> Restricts the width of image.</p> <p><b>Required</b> – Makes answering this Question mandatory. This setting overrides the Partial Complete Required setting in a Section and the Part Completion setting for a Form.</p>
<p>Signature</p> <p>Capture signature or free hand drawing</p>	<p>Question type: <input type="text" value="Signature"/></p> <p>Question name: <input type="text" value="Question3"/></p> <p>Question caption: <input type="text" value="Caption3"/></p> <p>Required: <input type="checkbox"/></p> <p>Height (in pixels): <input type="text" value="50"/></p> <p>Width (in pixels): <input type="text" value="100"/></p>	<p><b>Height (in pixels):</b> Restricts the height of image.</p> <p><b>Width (in pixels):</b> Restricts the width of image.</p> <p><b>Required</b> – Makes answering this Question mandatory. This setting overrides the Partial Complete Required setting in a Section and the Part Completion setting for a Form.</p>
<p>Video</p> <p>Capture video input</p>	<p>Question type: <input type="text" value="Video"/></p> <p>Question name: <input type="text" value="Question3"/></p> <p>Question caption: <input type="text" value="Caption3"/></p> <p>Required: <input type="checkbox"/></p>	<p><b>Required</b> – Makes answering this Question mandatory. This setting overrides the Partial Complete Required setting in a Section and the Part Completion setting for a Form.</p>
<p>Voice Note</p> <p>Capture audio input</p>	<p>Question type: <input type="text" value="Voice Note"/></p> <p>Question name: <input type="text" value="Question3"/></p> <p>Question caption: <input type="text" value="Caption3"/></p> <p>Required: <input type="checkbox"/></p>	<p><b>Required</b> – Makes answering this Question mandatory. This setting overrides the Partial Complete Required setting in a Section and the Part Completion setting for a Form.</p>

## Grid

For simple repeatable data that will display within the width of the mobile device

**Question type:**

**Question name:**

**Question caption:**

**Columns**

**Grid Default Data:**

**Columns** – Refer to Grid for more detail.

<p>Section Grid</p> <p>For complex repeatable data that will not display within the width of the mobile device</p>	<p><b>Question type:</b> <input type="text" value="Section Grid"/></p> <p><b>Question name:</b> <input type="text" value="Question4"/></p> <p><b>Question caption:</b> <input type="text" value="Caption4"/></p> <p><b>Associated Section</b> <input type="text"/></p> <p style="text-align: right;"><input type="button" value="Generate Columns"/></p>	<p><b>Generate Columns</b> – Refer to Section Grid for more detail.</p>
	<p><b>Columns</b></p> <div style="border: 1px solid black; height: 150px; width: 100%;"></div> <p style="text-align: right;"><input type="button" value="Add"/></p> <p><b>Grid Default Data:</b> <input type="text" value="&lt;GridData&gt;&lt;br/&gt;&lt;Grid&gt;&lt;br/&gt;&lt;Row /&gt;&lt;br/&gt;&lt;/Grid&gt;&lt;br/&gt;&lt;/GridData&gt;"/></p>	

## GPS Location Capture

Captures the GPS location of the mobile device. It requires a network connection.

Question type:	GPS Location Capture ▼
Question name:	Question7
Question caption:	Caption7
Button Caption:	Capture...
Timeout:	60
URL:	Bing Maps ▼
Required:	<input type="checkbox"/>
Maximise this control width on device?	<input type="checkbox"/>

**Button Caption:** Text appearing on the button.

**Timeout:** Time before GPS stops attempting to capture location in an area with poor signal.

**URL:** Bing/ Google maps.

**Maximise this control width on device?** – this Control can expand across the device screen to give more space for input.

**Required** – Makes answering this Question mandatory. This setting overrides the Partial Complete Required setting in a Section and the Part Completion setting for a Form.

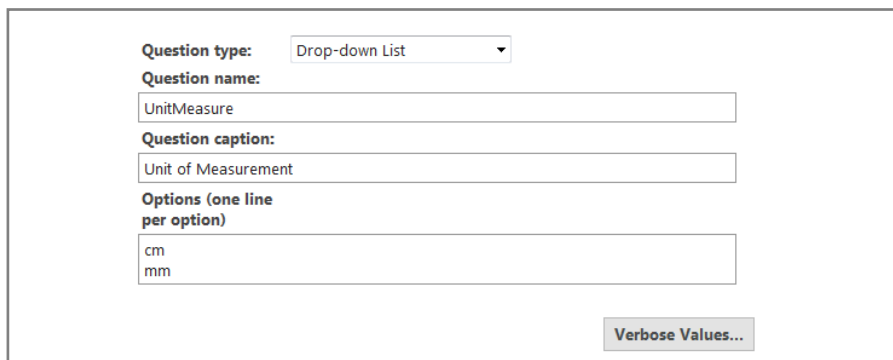
## Verbose values

A Verbose Value relates long pieces of text to abbreviated Questions for ease of use in Forms. There are several reasons to consider using the Verbose Values feature.

- You may have to abbreviate Question responses on the device to make the response fit the screen
- Abbreviated responses may be quicker for the field worker to input
- A single value in a response may equate to one or more longer explanations in a formal report
- You may want to provide an optional additional instruction to the field worker based on a dropdown list value selection

### Example 1: Expanding Abbreviations

A dropdown list shows abbreviations for the measurement scale on the device.

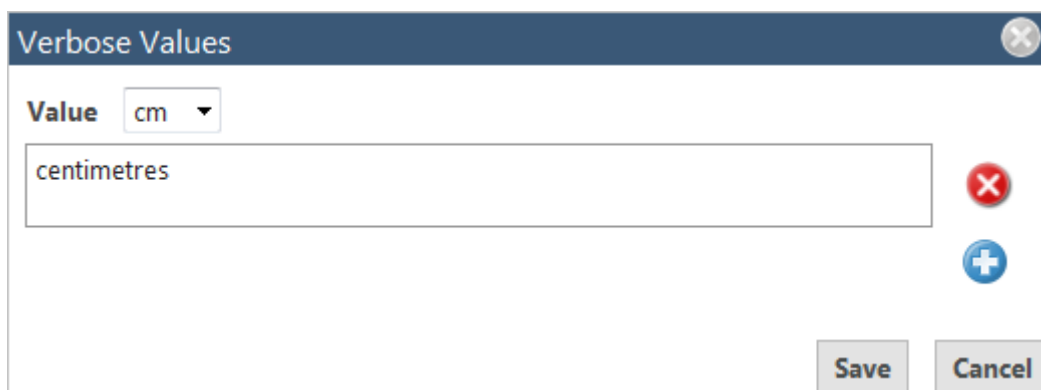


The screenshot shows a configuration window for a 'Drop-down List' question. The fields are as follows:

- Question type:** Drop-down List
- Question name:** UnitMeasure
- Question caption:** Unit of Measurement
- Options (one line per option):** cm, mm

A 'Verbose Values...' button is located at the bottom right of the configuration area.

For each value in the dropdown list, there is an alternative expanded text. The formal report uses this text to replace the abbreviated selection made by the field worker.



The 'Verbose Values' dialog box shows the configuration for the 'cm' value. The 'Value' dropdown is set to 'cm'. The expanded text 'centimetres' is entered in the text field. There are 'Save' and 'Cancel' buttons at the bottom, along with a red 'X' icon and a blue '+' icon.

### Example 2: Multiple texts from one short response

A Checkbox asks a simple True/False Question about the existence of a temperature gauge on a Storage Water Heater. On the device, the field worker only has to check the box if True or leave it unchecked if false.

Question type:

Question name:

Question caption:

Default value:

Options (one line per option, max 2 options)

The Verbose Values... button brings a popup screen where up to 10 interpretations of the value can be entered. Each interpretation might correspond to a place in the formal report.

**Verbose Values**

Value:

The formal report requires elegant text to describe the field worker's findings.

- At a first point in the report, there needs to be a description of the findings.
- At a second point in the report, there needs to be text that describes the effect of the findings.
- At a third point in the report, there is a list of actions arising because of the findings.

Answering True to the Question will have the following effect on the formal report:

### Asset Status

Asset Number	Status
12345	Temperature gauge fitted
....	....

### Issues

Asset Number	Status
12345	NA
....	....

## Actions

Asset Number	Status
12345	No action required
....	....

Answering False to the Question will have the following effect on the formal report:

## Asset Status

Asset Number	Status
12345	No temperature gauge fitted
....	....

## Issues

Asset Number	Status
12345	This asset is in breach of regulations
....	....

## Actions

Asset Number	Status
12345	Fit temperature gauge to the Storage Water Heater
....	

Refer to Show Number of Verbose for instruction on how to display the correct verbose value at a desired position in a document.

Example 3: Assisting/Instructing a field worker

On the Dropdown list there is also an option **Enable Verbose message at index**.

Selecting a value other than NA will cause an additional button to appear on the device. The field worker can use this button to display the verbose text from the position number identified. Using the same values as the previous example, but this time using a Dropdown list rather than a checkbox, the Enable Verbose message at index is set to 3.

Question type:

Question name:

Question caption:

Options (one line per option):

Enable Verbose message at index:

This has the effect of displaying the 3<sup>rd</sup> piece of text (within a possible 10) for the selected value.

In this example, if the response is False, the button will display the text

“Fit temperature gauge to the Storage Water Heater”

on the device. The field worker receives specific instructions based on the response to a Question.

## Grids

If the repeating data can display within the width of the mobile device then eSquiggles offers the Grid Question type option.

**Tab Details**

Question type:

Question name:

Question caption:

Entity type:

Entity:

**Columns**

Grid

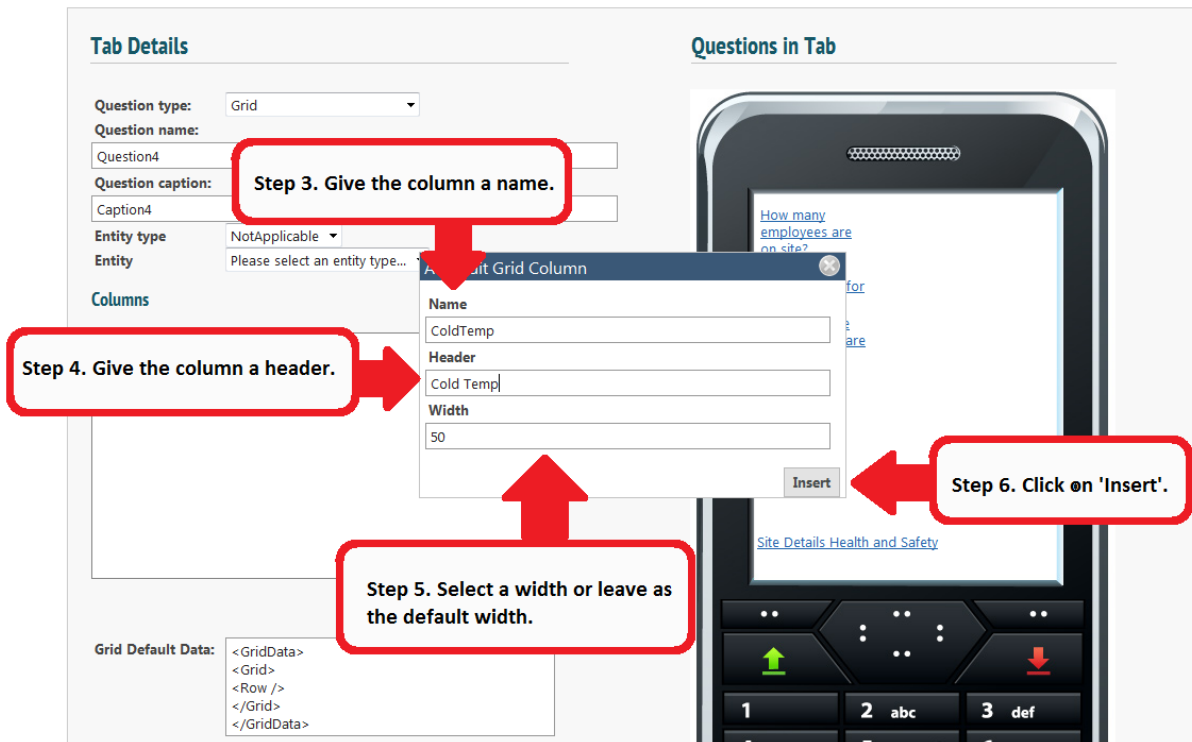
```
<Grid>
<Row />
</Grid>
</GridData>
```

**Questions in Tab**

How many employees are on site?  
Who holds responsibility for Fire Safety?  
How many fire extinguishers are on site?  
Caption4

[Site Details Health and Safety](#)

- The Add button creates a new column header in the Grid.



- Name the column. This **does not** show on the mobile device. It is equivalent to a Question name given to a normal Question. Do not use spaces in the column name.
- Give the column a Header. This **does** show on the mobile device. It is equivalent to the Question caption given to a normal Question.
- Choose a width for the column. The default of 50 pixels is the recommended starting point but the display will vary depending on the data content and device.
- The Insert button will add the new column to the grid.

### Tab Details

Question type:

Question name:

Question caption:

Entity type:

Entity:

#### Columns

Col Name	Col Caption	Width	Entity Mapping	Select	Delete
ColdTemp	Cold Temp	50			
HotTemp	Hot Temp	50			
TMVTemp	TMV Temp	50			
Scale	Scale	50			

**Grid Default Data:** `<GridData> <Grid> <Row ColdTemp="" HotTemp="" TMVTemp="" Scale="" /> </Grid> </GridData>`

### Questions in Tab

**Step 7.** The 'Select' button allows you to change the column details.

**Step 8.** The 'Delete' button removes the column from the grid.

**Step 9.** The position arrows are used to change the order of the columns on the grid.

- The Grid Column entries can be edited, deleted and repositioned using the icons next to the column entry.
- Remember to Save the changes. Save by clicking:

## Section Grids

If the repeating data cannot display within the width of the mobile device then eSquiggles offers an alternative Section Grid option.


Description	Cold (°C)	Hot (°C)
Kitchen sink	10	30
Shower	8	40
Handwash basin	5	35

Using the above example of repeating data:

### Tab Details

Current tab title:

### Questions in Tab



- Create a Section with Repeatable and Template only options set. The recommended naming convention is to use a singular reference. For example: Temperature
- Create one Tab using the same singular reference (recommended but not essential).
- Create Questions relating to the column headings. For example: Description (Text box), Cold (Numeric value), Hot (Numeric value). You can use text box, numerical value, drop down list, check box, radio buttons, text expander, date and time Question types. Verbose answers are not suitable for Sections for use in Section Grids.
- Save the Section

esquiggles Data Collection Software
Jobs - Issues Client - Site Resources Asset Register Administration Tools My Account Labs Logout

User: TONY ((Pulsion Testing)) Current Date: 31/01/2012

Forms Designer : Section List : Tab List

### Form Name - Test

#### Section Details

Section title:

Repeatable:


Template-only:

Partial Complete Required:

System Section:

Grid Entity Creation: NotApplicable

#### Tabs in Section



- Create a new Section and Tab. The recommended naming convention is use the plural of the same reference as used for the Template Section. Name the Section and the Tab with the same reference (recommended but not essential).

### Tab Details

Question type: Section Grid

Question name:

Question caption:

Entity type: NotApplicable

Entity: Please select an entity type...

Associated Section: Temperature

[Generate Columns](#)

#### Columns

Col Name	Col Caption	Width	Entity Mapping	Visible	Select	Delete
Description	Description		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cold	Cold		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hot	Hot		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[Add](#)

Grid Default Data:

[Cancel](#) [Save](#)

### Questions in Tab

- Create a Question Type within the Tab. Select the Section Grid from the Question type drop down list. Name the Question Name and Question Caption Grid (recommended but not essential).
- In the Associate Section dropdown, select the Template only Section that contains all the Questions for the grid headers.
- The button Generate Columns will create a set of column headings that match the Questions in the Template only Section. You can edit these using the pencil icon to change the Header Description, Width and visibility on the Form. Warning: If you have specified a Question in the Template only Section as Required, it has to be visible.
- The Add button allows for the addition of extra columns in this Section Grid. This might be useful if sharing a Template only Section across several Section Grids where only one or two data items are changing between them. It is a balance between re-using the same Template only Section and maintaining the changes within the Section Grid definition.

# Microsoft Word Document Template Design Instructions

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## Recommendations for all Versions of Word

Consider the Good Practice Guidelines for Form Design when designing your document template. The same principles apply when considering Grids, Repeating Sections etc.

With all versions of Word, you can have multiple templates that are associated with the same mobile Form. For example: you could produce a detailed report showing all of the findings from an inspection and a summary report showing only the issues and recommendations. Both reports would take data from the same job with data recorded in the same Form.

## Create a Word 2010 Template

### Set up the eSquiggles Add-in Component

You may need to ask your IT department to perform these actions if you do not have sufficient administrative rights on your PC.

#### Copy Component to PC

eSquiggles will provide you with the Word component set up files.

Follow the instructions to install the component.

Should you ever have an issue with the component, uninstall and re-install it.

#### Install eSquiggles Add-in Component

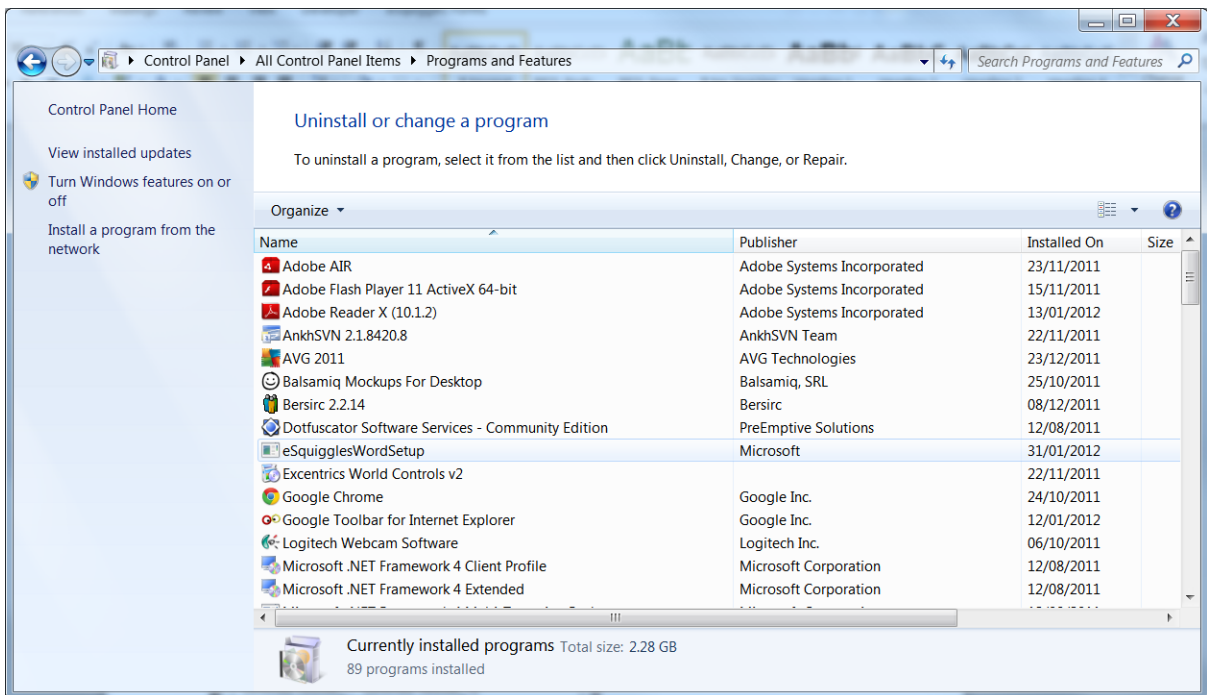
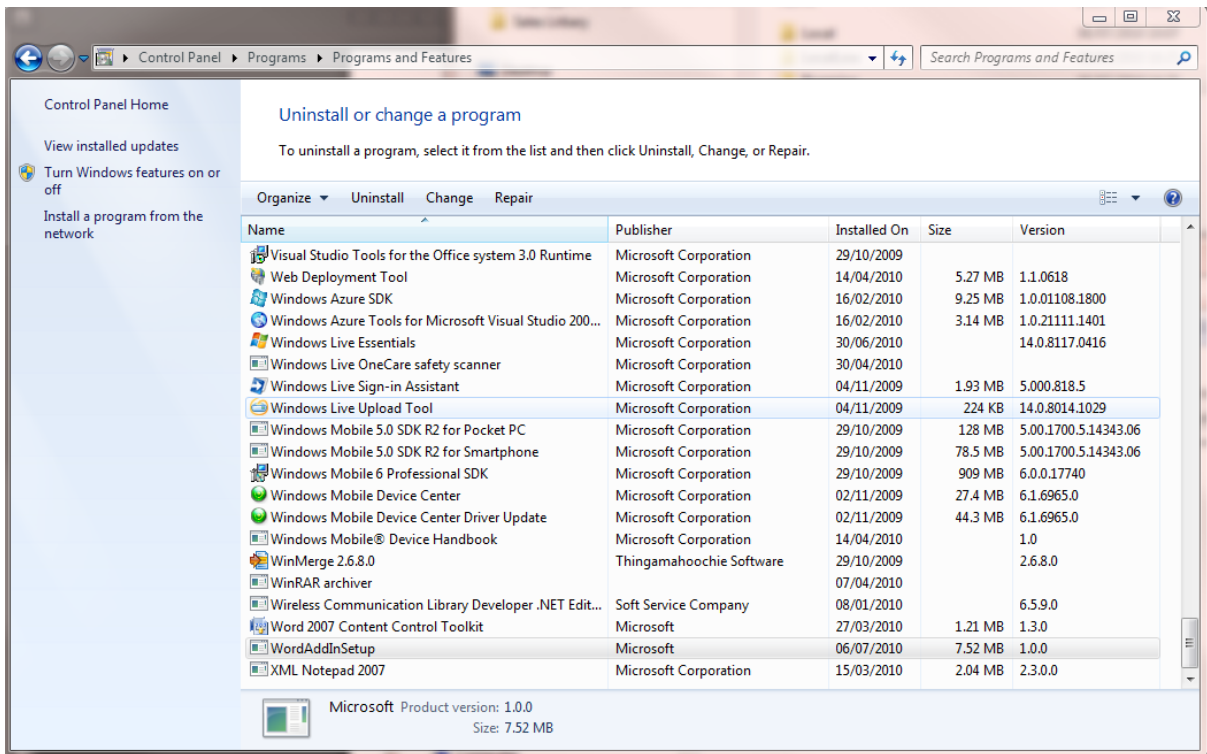
To install (currently) –

1. Close word
2. run the eSquigglesWordSetup.exe.
3. Then go to the install folder C:\Program Files\Microsoft\eSquigglesWordSetup\ or C:\Program Files (x86)\Microsoft\eSquigglesWordSetup\  
C:\Program Files (x86)\Microsoft\eSquigglesWordSetup\
4. And open the file “WordAddIn1.vsto”
5. This registers the add-in
6. Open word and check that eSquiggles Forms appears as an additional tab on the ribbon

#### Uninstall eSquiggles Add-in Component

Uninstall the following two applications – via the control panel

- WordAddInSetup
- eSquigglesWordSetup



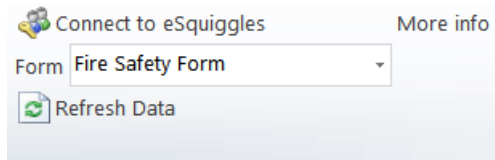
## Create a Document Template

Create your document template like any other Word document. Leave spaces large enough to display the information from the jobs. Consider the length and type of data to display. Save your template as a normal word document. Do not save it as a Word Template.

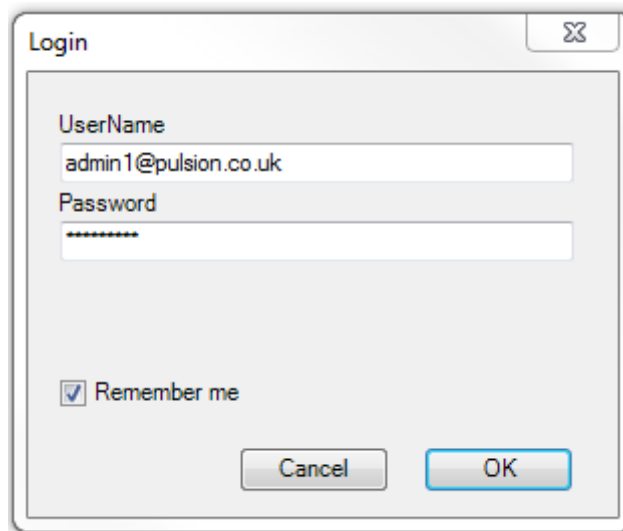
## eSquiggles Ribbon Add-in Component



## Connect to Your eSquiggles Environment



Click on Connect to eSquiggles and enter your eSquiggles username and password to connect to your eSquiggles installation.



Once connected, eSquiggles populates the Form dropdown with all your Published Forms.

## Summary of Terms

Before proceeding with designing a Word document, please ensure you understand the terminology used in eSquiggles.

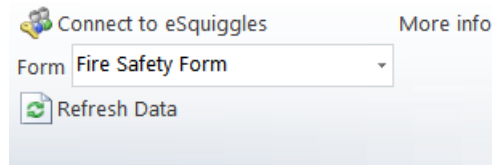
A Field relates to the response to the Questions defined in an eSquiggles Form. When you create a Question you give it an internal name and a caption. The caption displays on the device as the prompt for a response. A caption can be very short because what is it prompting for is obvious within context, or it can be very long because it needs to be a clear description to obtain the required response. The name should be as short as possible while uniquely distinguishing the response from all other responses in the Form.

To summarise:

- |                  |  |
|------------------|--|
| Question Type    | defines what type of Control will record the response, a textbox, a dropdown etc.                    |
| Question name    | the internal name that should uniquely distinguish the response from all other responses in the Form |
| Question caption | the prompt that is displayed on the device for a response  |
| Field            | uses any of the above to identify the response to the Question within a job                          |

Placeholder                      the special marker in the Word document that tells eSquiggles where to position each Field

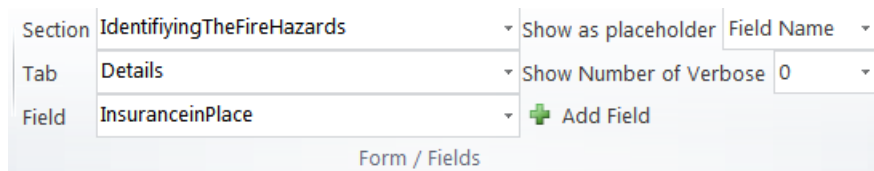
## Form Fields



Selecting a Form populates:

- the Section dropdown with the Section Titles from the selected Form
- the Tabs dropdown with the first Tab Title in the first Section
- the Fields dropdown with the Fields within the first Tab.

## Section / Tab / Field



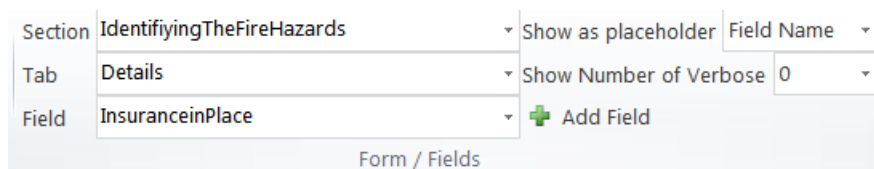
To add placeholders for data items to the document, place the cursor at the desired position in the document.

Select the relevant Section from the Form using the Section dropdown. This populates the Tab dropdown with all of the Tabs for the selected Section.

Select the relevant Tab from the Tab dropdown. This populates the Field dropdown with all the Fields for the selected Tab.

Select a Field from the Field dropdown. A Placeholder for the selected Field will appear in the document. You can add more copies of the same Field by clicking the Add Field button next to the Field dropdown.

## Placeholder Identification



The Show as Placeholder dropdown gives options for the Placeholder reference in the document.

- Field name                      the Question name from the Form Question
- Field caption                      the Question caption from the Form Question
- Control type                      the Question type from the Form Question
- Empty                              the placeholder will appear empty in Form Design, but will contain the appropriate item of information when a report is created.

Note that once a Placeholder exists in a document you cannot change the Placeholder reference type. You should select the type of Placeholder reference BEFORE creating placeholders for Fields. The default is Field name, which is the internal Question name. The eSquiggles naming recommendations state that the internal Question name uniquely identifies each Question in the Form.

eSquiggles recommend that you choose your preferred setting and keep that consistent throughout your document to avoid confusion.

eSquiggles recommend that you consider the length of Placeholder names when creating Question names and captions. Remember that caption names display on the mobile device and, to save space, may be very terse. You may have difficulty identifying the exact Field by the caption as you may have created several Questions with the same caption. For example: a Tab may have several Questions with the caption "Date" and where the Question names distinguish between ManufacturingDate, InstallationDate, LastInspectionDate.

### Show Number of Verbose

Refer to Verbose values for the explanation of a Verbose Value in a Question.

This option allows you to pick how many of the 10 possible verbose values held for a Question you wish to see in the Field dropdown. Using the same examples as in the Verbose values explanation where the Form response is False, choosing to show 2 verbose values at this point in the document will display the first and second verbose value for each Question.

TempGuages  
 TempGuages.Verbose\_1  
 TempGuages.Verbose\_2

Choosing TempGuages.Verbose\_1 at this point in the document will display the first verbose value for the False option for each selected Question.

### Asset Status

Asset Number	Status
12345	No temperature gauge fitted
....	....

Choosing the TempGuages.Verbose\_2 at this point in the document will display the second verbose value for the False option for the selected Question.

### Issues

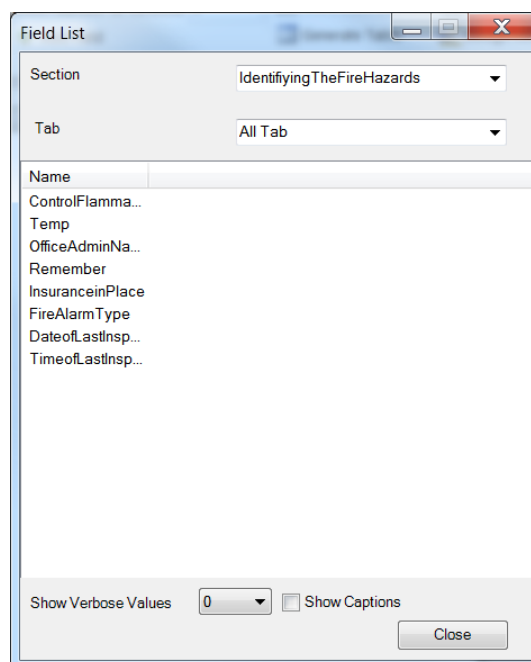
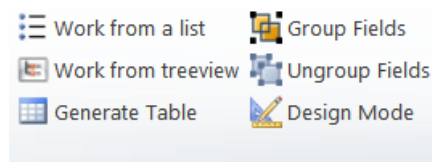
Asset Number	Status
12345	This asset is in breach of regulations
....	....

Choosing the verbose value of 3 at this point in the document will display the third verbose value for the False option for the selected Question.

## Actions

Asset Number	Status
12345	Fit temperature gauge to the Storage Water Heater
....	

### Work from a list

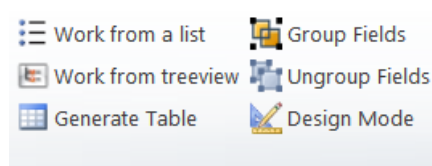


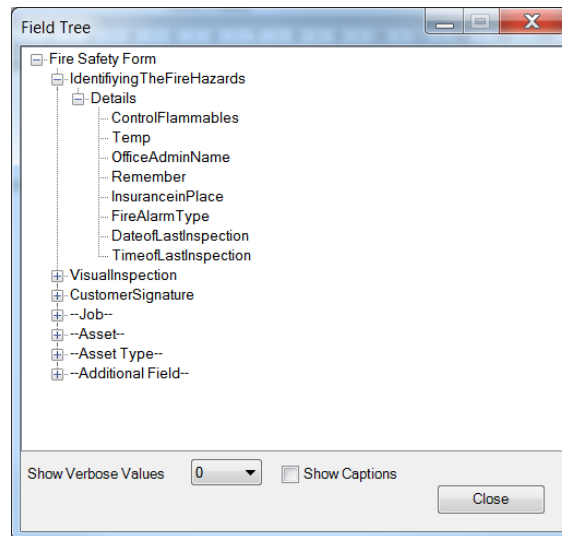
Work from a list provides an alternative selection method. The Section and Tab dropdowns allow the dynamic change of the Fields available. Place the cursor at the desired position in the document and then double click on the Field to create the Placeholder.

Show Verbose Values is the same as Show Number of Verbose.

Show Captions displays the Question caption alongside the Question name. This is useful if the Question name does not distinguish the Question sufficiently.

### Work from Treeview



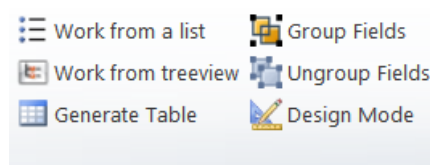


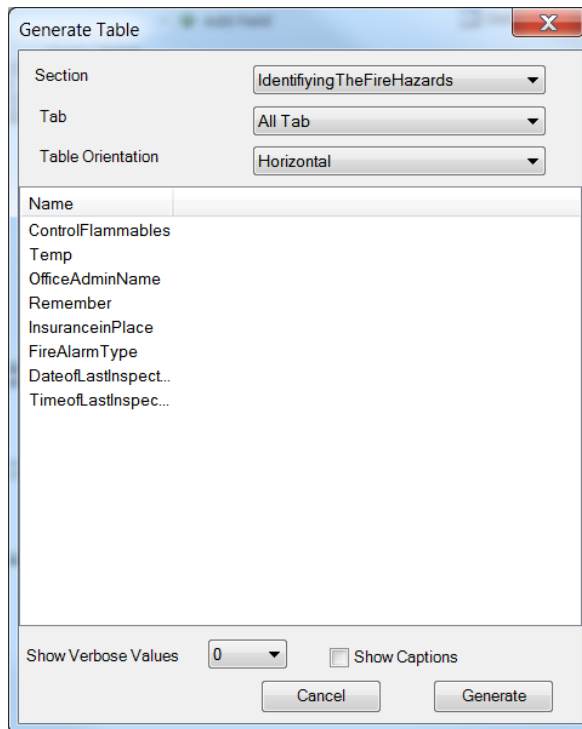
Work from a treeview provides an alternative selection method. The entire Form content is shown as an expandable and collapsible tree. Place the cursor at the desired position in the document and then double click on the Field to create the Placeholder.

Show Verbose Values is the same as Show Number of Verbose.

Show Captions displays the Question caption alongside the Question name. This is useful if the Question name does not distinguish the Question sufficiently.

## Generate Table





Generate table will automatically create a table in the document based on the Questions within the select Tab. There are two options:

- Horizontal
- Vertical

Horizontal appears as:

Question	ControlFlammables	Temp	OfficeAdminName	Remember	InsuranceinPlace	FireAlarmType	DateofLastInspection	TimeofLastInspection
Answer	ControlFlammables	Temp	OfficeAdminName	Remember	InsuranceinPlace	FireAlarmType	DateofLastInspection	TimeofLastInspection

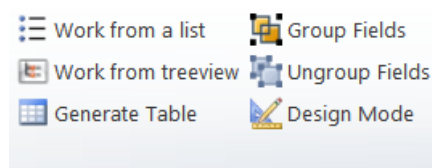
Vertical appears as:

Question	Answer
ControlFlammables	ControlFlammables
Temp	Temp
OfficeAdminName	OfficeAdminName
Remember	Remember
InsuranceinPlace	InsuranceinPlace
FireAlarmType	FireAlarmType
DateofLastInspection	DateofLastInspection
TimeofLastInspection	TimeofLastInspection

Show Verbose Values is the same as Show Number of Verbose.

Show Captions displays the Question caption alongside the Question name. This is useful if the Question name does not distinguish the Question sufficiently.

## Group Fields



In your Form you may have identified a Section as Repeatable; this includes Repeatable Sections used in Section Grids.

To identify the Repeatable Fields that correspond to the Questions in the Repeatable Section, highlight the entire area to repeat (including headers columns on table layouts) and click on Group Fields.

### Stored Hot Water

<b>System reference</b>	<u>SHWSystemReference</u>		
<b>Location</b>	<u>SHWLocation</u>		
<b>Accessibility</b>	SHWAccessibility		
<b>Dimensions (metres)</b>	<b>HEIGHT</b>		<b>DIAMETER</b>
	SHWHeight		SHWDiameter
<b>Calorifier Capacity (litres)</b>	SHWCapacity	Over storage?	SHWOverStorage
<b>Connected to other heaters</b>	SHWConnected		
<b>Supplied From</b>	SHWSupplied		
<b>Areas / Services Supplied</b>	SHWAreas		

Selecting the entire table above will repeat this table as many times as the Repeatable Section appears with data responses for the job.

To check you have highlighted the right area, select the Developer tab in the Ribbon. Select Design Mode in the Controls section of the Ribbon. This shows the format tags for all the placeholders including the opening and closing Group tags.

## Stored Hot Water

« Group »			
<b>System reference</b>	« SHWSystemReference » SHWSystemReference SHWSystemReference »		
<b>Location</b>	« SHWLocation » SHWLocation SHWLocation »		
<b>Accessibility</b>	« SHWAccessibility » SHWAccessibility SHWAccessibility »		
<b>Dimensions (metres)</b>	<b>HEIGHT</b>		<b>DIAMETER</b>
	« SHWHeight » SHWHeight SHWHeight »		« SHWDiameter » SHWDiameter meter SHWDiameter »
<b>Calorifier Capacity (litres)</b>	« SHWCapacity » SHWCapacity SHWCapacity »	Over storage?	« SHWOverStorage » SHWOverStorage SHWOverStorage »
<b>Connected to other heaters</b>	« SHWConnected » SHWConnected SHWConnected »		
<b>Supplied From</b>	« SHWSupplied » SHWSupplied SHWSupplied »		
<b>Areas / Services Supplied</b>	« SHWAreas » SHWAreas SHWAreas »		
» Group			

The effect of this Group will be to display “Stored Hot Water” as a title once and then repeat the table of data for each time the Repeatable Section is used in the job.

For Section Grids, create your grid layout in your Word document. Select the entire table including the column headers.

Location	Cold Temp	Hot Temp
Location	TRCold	TRHot

« Group »	Location	Cold Temp	Hot Temp
« Location »	Location Location »	TRCold TRCold TRCold »	TRHot TRHot TRHot » Group »

The eSquiggles Word add-in component knows to show the headers only once for a Section Grid and repeat the data rows.

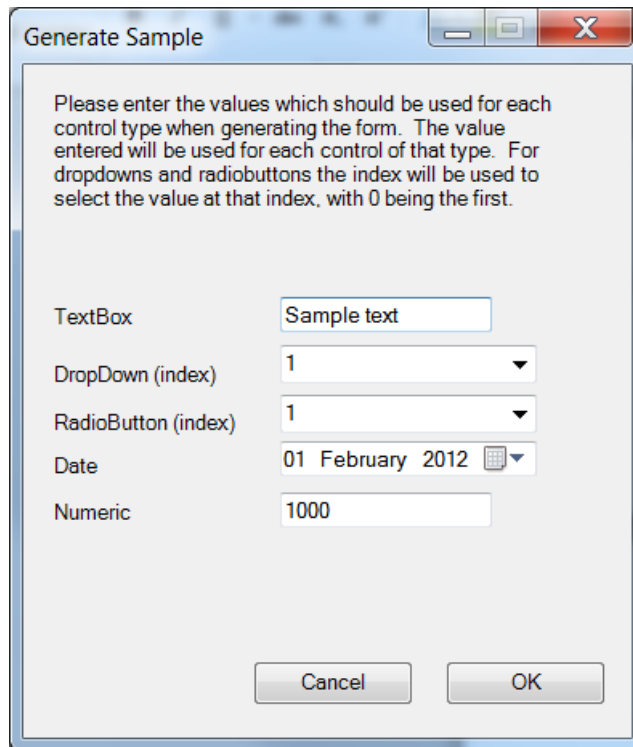
## Validation Testing

### Validate Fields

Validate Fields checks that all the Field Placeholders are associated with Questions in the selected Form. This is particularly useful if you have copied a Word document template for use with another Form or have changed a Form. A pop up will inform you of any placeholders that cannot be associated with a Form Question. It will also inform you of incorrect grouping of Repeatable Sections.

### Generate Sample Document

eSquiggles will generate a sample document using the Word document template. A pop up prompts for test values to use for the main Question Types. This gives a rough indication of what a completed document will look like.



Generate Sample

Please enter the values which should be used for each control type when generating the form. The value entered will be used for each control of that type. For dropdowns and radiobuttons the index will be used to select the value at that index, with 0 being the first.

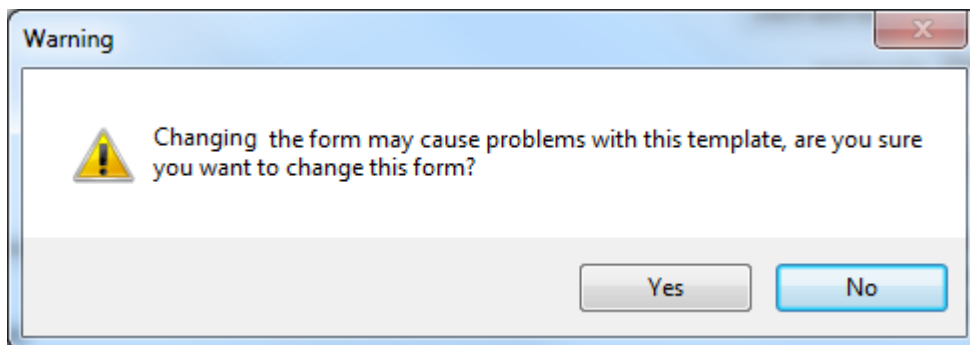
TextBox	<input type="text" value="Sample text"/>
DropDown (index)	<input type="text" value="1"/>
RadioButton (index)	<input type="text" value="1"/>
Date	<input type="text" value="01 February 2012"/>
Numeric	<input type="text" value="1000"/>

Cancel OK


## Editing an Existing Word Document Template

You can make changes to a Word document template to match changes in your Form anytime.

You can copy an existing Word document template and then amend it to match a new Form. When you select the new Form from the Form dropdown you will receive the following warning:



Warning

 Changing the form may cause problems with this template, are you sure you want to change this form?

Yes No

This prevents you accidentally changing the relationship between a Word document template and an eSquiggles Form. Respond Yes if you intend this action.

All Field placeholders in the document must relate to a Question in the selected eSquiggles Form. Remember to delete any placeholders that relate to a Question that does not exist in your new Form. Use Validate Fields to check the placeholders.

# Create a Word 2007 Document Template

Templates are associated with Forms as a means of allowing the data captured in the forms to be outputted in any format required. You can have multiple templates associated with a particular form to allow different reports to be generated based on one set of captured data. Creating a template from an empty Word document:

If you are starting afresh and wish to create the output with a blank word document to start, please follow this process. Alternatively, if you wish to use an existing document or template, please refer to “Creating a Word template from an existing Word document” below.

Step 1 – Logon to esquiggles. Select the ‘Forms Designer’ option from the tools menu on the home page – see image below

## Published Forms

ID	Pinned	Name	Published Date	Published By	Templates	Un-Publish	Copy to Designer	Delete
4601	<input type="checkbox"/>	Citros HP	06 March 2012 15:11	dash test				
4362	<input checked="" type="checkbox"/>	Outlet (C)	30 March 2011 14:22	Raymond Booth				
4361	<input checked="" type="checkbox"/>	Outlet (H)	30 March 2011 14:22	Raymond Booth				
4360	<input checked="" type="checkbox"/>	Temp (C)	30 March 2011 14:22	Raymond Booth				
4359	<input checked="" type="checkbox"/>	Temp (H)	30 March 2011 14:22	Raymond Booth				
4358	<input checked="" type="checkbox"/>	WM Annual Review	30 March 2011 14:22	Raymond Booth				
4343	<input checked="" type="checkbox"/>	WM Tank Visual	30 March 2011 14:22	Raymond Booth				

## Unpublished Forms

Ref	Name	Last updated	Updated By	Templates	Publish	Edit Form	Delete
6134	New Form, 07/02/2012 14:30:25	07 March 2012 11:40	Martin Walmsley				
6141	New Form, 13/02/2012 14:28:21	13 February 2012 14:29	Martin Walmsley				
6142	New Form, 15/02/2012 11:49:50	15 February 2012 11:50	Martin Walmsley				









New Form

Step 2 – Choose the form you wish to edit from the list of published forms and then click the Templates button highlighted below:

## Published Forms

ID	Pinned	Name	Published Date	Published By	Templates	Un-Publish	Copy to Designer	Delete	Edit Xml
4601	<input type="checkbox"/>	Citros HP	06 March 2012 15:11	dash test					
4362	<input checked="" type="checkbox"/>	Outlet (C)	30 March 2011 14:22	Raymond Booth					
4361	<input checked="" type="checkbox"/>	Outlet (H)	30 March 2011 14:22	Raymond Booth					
4360	<input checked="" type="checkbox"/>	Temp (C)	30 March 2011 14:22	Raymond Booth					
4359	<input checked="" type="checkbox"/>	Temp (H)	30 March 2011 14:22	Raymond Booth					
4358	<input checked="" type="checkbox"/>	WM Annual Review	30 March 2011 14:22	Raymond Booth					
4357	<input checked="" type="checkbox"/>	WM Calorifier Temperatures	30 March 2011 14:22	Raymond Booth					
4356	<input checked="" type="checkbox"/>	WM Calorifier Visual	30 March 2011 14:22	Raymond Booth					
4355	<input checked="" type="checkbox"/>	WM Chemical Activity Monthly	30 March 2011 14:22	Raymond Booth					
4354	<input checked="" type="checkbox"/>	WM Chemical Activity Quarterly	30 March 2011 14:22	Raymond Booth					
4343	<input checked="" type="checkbox"/>	WM Tank Visual	30 March 2011 14:22	Raymond Booth					

Step 3 – Select the Word Document presented within the list by clicking upon the edit template button.

	Name	Created By	Created Date	Edit	Delete
	Sample Word Template	dash@test.com	06/03/2012 15:09		
	Sample Excel Template	dash@test.com	06/03/2012 15:09		
	Sample Word2007 Template	dash@test.com	06/03/2012 15:09		

Step 4 – To download the current default template click upon one the 'here' links highlighted below:

### View Existing Template

To view the existing work template, click [here](#).  
This will open the existing formatter for this form in Word.

### Edit Existing Template

Step 1  
To edit the existing template, click [here](#). If you already have a document which you have been working on using the schema, skip step 1)

Step 2  
Makes Changes to the document and save to your desktop as ".docx"

Step 3  
Click browse, locate the file and select it

Step 4  
Click 'Update Template' button

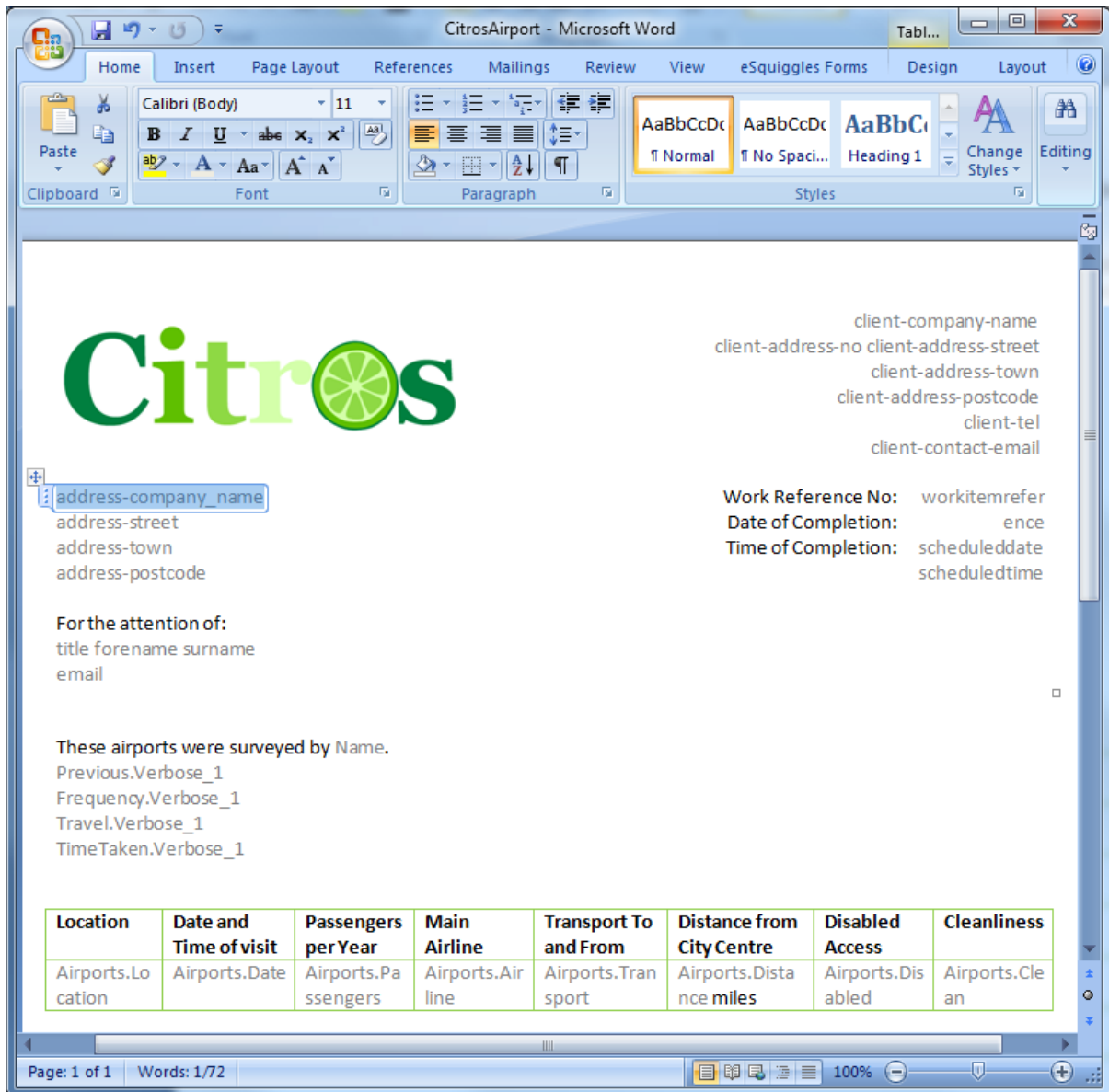
### More Options

**Default template** – This will open a template which has all the fields already in place in a simplistic format. Can be used as a good starting point.

**Generate Schema** – For more advanced scenarios, a schema can be used to import the fields into word.  
By generating and saving this XML Schema you can import this into an existing word document and use the XML features to incorporate your form fields within the existing document

**Change Template Name** – Changes the name of the current template.  
template:

Step 5 – Once downloaded, the document can be opened with Word 2007 or greater and will contain all the tags needed for the selected form, this acts as a normal word document. The tags can be moved into position using cut and paste. The tags can also be deleted if you do not require them. Note: When the report is created the tags (elements in blue) will be replaced with the actual textual value.




Step 6 – Go to the file menu and select save, if this is the first save make sure the file is saved in a familiar location. This is important as you will have to upload the document.

Step 7. – Once you have updated the template, it can be uploaded to eSquiggles by selecting the file using the 'Browse' button (shown in step 4) and clicking the "Update Template" button.

Step 6 – Click the browse button and select the document created using the first five steps. Now click the update button. View the details of the form again and click view existing formatter button again to make sure the new template is uploaded. If template has been updated the document may be closed. The next time a report is created for a job the new template will be in place. Notice this new template is only activated for the form that was chosen in Step 2. Changes to the template may be made at any time, but for the changes to take place remember to upload the updated document. This template may be uploaded for multiple forms.

Repeatable Sections:


Select all tags to be repeated and press 'Group Fields':  Group Fields

Location	Date and Time	Passengers	Main	Transport To and From	Distance from City Centre	Disabled Access	Cleanliness
« Group				« Airports.Transport	Airports.Distance	« Airports.Disabled	« Airports.Clean
« Airports.Location	Airports.Date»	Passengers	« Airports.Airline	Airports.Transport	Airports.Distance	Airports.Disabled	Airports.Clean
Airports.Location		Airports.Passenger	Airports.Airline	Airports.Transport	Airports.Distance miles	Airports.Disabled	Airports.Clean
Airports.Location							Group»

The repeatable section is labelled with a 'Group' tag.

## Delete Empty Tags from Templates

Sometimes, you may want to remove content from the word document if certain portions of the data capture form have not been completed.

Select the tag to be deleted if empty and press 'Delete if Empty':  Delete If Empty. This will ensure that if no information is entered on the mobile form, the document will still appear as intended, without any empty spaces.

By default, if a template only repeatable section is not added to the document, the associated content will be removed from the outputted template – note that if a repeatable section is not marked as template only, then then details will be added to the document.

## Edit Word Template

There are some slight differences when editing an existing unpublished Word Template. If a form has changed, such as if new fields have been added, then the existing template when opened will list the new fields at the bottom of the document for the user to either remove or place in the correct location. Conversely, if fields have been removed from the form then they should also be removed from any existing word templates.

# Create a Word 2010 Document Template

Templates are associated with Forms as a means of allowing the data captured in the forms to be outputted in any format required. You can have multiple templates associated with a particular form to allow different reports to be generated based on one set of captured data.

Creating a template from an empty Word document:

If you are starting afresh and wish to create the output with a blank word document to start, please follow this process. Alternatively, if you wish to use an existing document or template, please refer to "Creating a Word template from an existing Word document" below.

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4362	<input checked="" type="checkbox"/>	Outlet (C)	30 March 2011 14:22	Raymond Booth				
4361	<input checked="" type="checkbox"/>	Outlet (H)	30 March 2011 14:22	Raymond Booth				
4360	<input checked="" type="checkbox"/>	Temp (C)	30 March 2011 14:22	Raymond Booth				
4359	<input checked="" type="checkbox"/>	Temp (H)	30 March 2011 14:22	Raymond Booth				
4358	<input checked="" type="checkbox"/>	WM Annual Review	30 March 2011 14:22	Raymond Booth				
4343	<input checked="" type="checkbox"/>	WM Tank Visual	30 March 2011 14:22	Raymond Booth				

## Unpublished Forms

Ref	Name	Last updated	Updated By	Templates	Publish	Edit Form	Delete
6134	New Form, 07/02/2012 14:30:25	07 March 2012 11:40	Martin Walmsley				
6141	New Form, 13/02/2012 14:28:21	13 February 2012 14:29	Martin Walmsley				
6142	New Form, 15/02/2012 11:49:50	15 February 2012 11:50	Martin Walmsley				

[New Form](#)

Step 2 – Choose the form you wish to edit from the list of published forms and then click the Templates button highlighted below:

## Published Forms

ID	Pinned	Name	Published Date	Published By	Templates	Un-Publish	Copy to Designer	Delete	Edit Xml
4601	<input type="checkbox"/>	Citros HP	06 March 2012 15:11	dash test					
4362	<input checked="" type="checkbox"/>	Outlet (C)	30 March 2011 14:22	Raymond Booth					
4361	<input checked="" type="checkbox"/>	Outlet (H)	30 March 2011 14:22	Raymond Booth					
4360	<input checked="" type="checkbox"/>	Temp (C)	30 March 2011 14:22	Raymond Booth					
4359	<input checked="" type="checkbox"/>	Temp (H)	30 March 2011 14:22	Raymond Booth					
4358	<input checked="" type="checkbox"/>	WM Annual Review	30 March 2011 14:22	Raymond Booth					
4357	<input checked="" type="checkbox"/>	WM Calorifier Temperatures	30 March 2011 14:22	Raymond Booth					
4356	<input checked="" type="checkbox"/>	WM Calorifier Visual	30 March 2011 14:22	Raymond Booth					
4355	<input checked="" type="checkbox"/>	WM Chemical Activity Monthly	30 March 2011 14:22	Raymond Booth					
4354	<input checked="" type="checkbox"/>	WM Chemical Activity Quarterly	30 March 2011 14:22	Raymond Booth					
4343	<input checked="" type="checkbox"/>	WM Tank Visual	30 March 2011 14:22	Raymond Booth					

Step 3 – Select the Word Document presented within the list by clicking upon the edit template button.

	Name	Created By	Created Date	Edit	Delete
	Sample Word Template	dash@test.com	06/03/2012 15:09		
	Sample Excel Template	dash@test.com	06/03/2012 15:09		
	Sample Word2007 Template	dash@test.com	06/03/2012 15:09		

Step 4 – To download the current default template click upon one the 'here' links highlighted below:

### View Existing Template

To view the existing work template click [here](#). This will open the existing formatter for this form in Word.

### Edit Existing Template

Step 1  
To edit the existing template, click [here](#). If you already have a document which you have been working on using the schema, skip step 1)

Step 2  
Makes Changes to the document and save to your desktop as ".docx"

Step 3  
Click browse, locate the file and select it

Step 4  
Click 'Update Template' button

### More Options

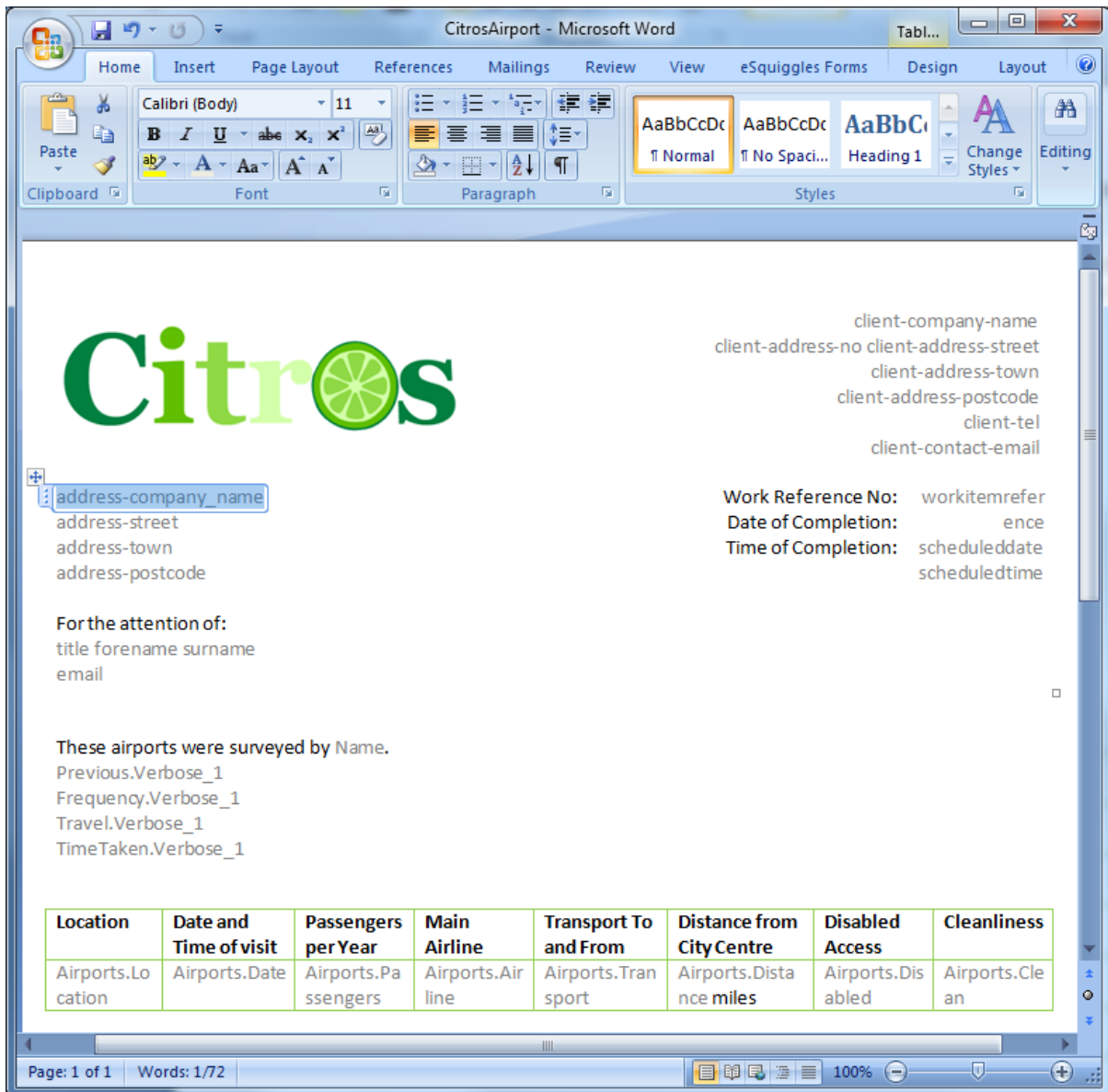
**Default template** – This will open a template which has all the fields already in place in a simplistic format. Can be used as a good starting point.

**Generate Schema** – For more advanced scenarios, a schema can be used to import the fields into word.

By generating and saving this XML Schema you can import this into an existing word document and use the XML features to incorporate your form fields within the existing document

**Change Template Name** – Changes the name of the current template.  
template:

Step 5 – Once downloaded, the document can be opened with Word 2007 or greater and will contain all the tags needed for the selected form, this acts as a normal word document. The tags can be moved into position using cut and paste. The tags can also be deleted if you do not require them. Note: When the report is created the tags (elements in blue) will be replaced with the actual textual value.




Step 6 – Go to the file menu and select save, if this is the first save make sure the file is saved in a familiar location. This is important as you will have to upload the document.


Step 7. – Once you have updated the template, it can be uploaded to eSquiggles by selecting the file using the 'Browse' button (shown in step 4) and clicking the "Update Template" button.

Step 6 – Click the browse button and select the document created using the first five steps. Now click the update button. View the details of the form again and click view existing formatter button again to make sure the new template is uploaded. If template has been updated the document may be closed. The next time a report is created for a job the new template will be in place. Notice this new template is only activated for the form that was chosen in Step 2. Changes to the template may be made at any time, but for the changes to take place remember to upload the updated document. This template may be uploaded for multiple forms.

Repeatable Sections:

Select all tags to be repeated and press 'Group Fields':  Group Fields

Delete if Empty:

Select the tag to be deleted if empty and press 'Delete if Empty':  Delete If Empty . This will ensure that if no information is entered on the mobile form, the document will still appear as intended, without any empty spaces.

# Appendices

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## Appendix A eSquiggles Bundled Data

### General Information

The following fields are general information fields

#### Job

Field	Description	Additional Info
workitemreference		The name of the Form
scheduleddate		
scheduledtime		
title		The title of the person associated with the job (from the site)
forename		The forename of the person associated with the job (from the site)
surname		The surname of the person associated with the job (from the site)
Email		
Hometelephone		
eveningtelephone		
mobiletelephone		
fax		
preferred		
assignedto-username		

#### Address info

## Property Details

Company Name	Scottish Football Association	
Property Name	SFA House	
Address	123	The Circle
	Hillhead	
	Glasgow	
	Strathclyde	
	G1 5AA	
Country	United Kingdom	
Property Ref No		

The address fields are shown below, along with an example from the above screenshot.

address-paonstartrange	Number	123
address-paondescription	Property Name	SFA house
address-street	Street	The Circle
address-locality	Locality	Hillhead
address-town	Town	Glasgow
address-administrativearea	Admin Area	Strathclyde
address-postcode	Postcode	G1 5AA
address-company_name	Company Name	Scottish Football Association
address-countrydescription	Country	United Kingdom
address-summary-envelope		Separated with nospaces: Paonstartrange Paondescription Street Locality Town Administrativearea Postcode Country  e.g. 123The CircleHillheadGlasgowStrathclydeG1 5AAUnited Kingdom
address-summary-online		separated by comma, space: Paonstartrange Paondescription Street Locality Town Administrativearea Postcode Country  e.g. 123, The Circle, Hillhead, Glasgow, Strathclyde, G1 5AA, United Kingdom
address-propertyreference	Property Ref no	

jobtimelength	Job Length	As specified in the forms designer
notes	Job Notes	Job Notes added on the add job or job summary screen
Engineercomments	Engineer Comments	Job notes added in the engineer comments box on the job summary screen or via the device
Companyname		

## Job History

Status	Date	By
Submitted	8/18/2010 12:35	John Doe
Allocated	8/18/2010 12:35	John Doe
In Progress	8/18/2010 12:36	John Doe
Mobile Form Completed	8/18/2010 12:38	John Doe
Job Completed	8/18/2010 12:38	John Doe

The following fields relate to the history of the job, when state changes happened and who performed them.

submitteddate		The date and time the job was submitted (or created)
submittedby		Who performed the action
allocateddate		The date and time the job was allocated
allocatedby		
inprogressdate		The date and time the job went to "in progress". This happens when the job is opened on the device or "Complete Form Online" is selected on the website.
inprogressby		
mobileformcompleteddate		The date and time the Form was completed on the device or online
mobileformcompletedby		
jobcompleteddate		The date and time the job was marked as complete
jobcompletedby		
externalupdatecompleteddate		If you have a 3rd party system link, the date and time the job was updated in the external system
externalupdatecompleteby		
rejecteddate		The date and time the job was rejected (if applicable)
rejectedby		
partiallycompleteddate		The date and time the job was

		partially completed (if applicable)
partiallycompletedby		

**Asset information**

asset_id		
asset_name		
asset_number		
asset_location		
asset_locationname		
asset_company		
asset_created		
asset_createdby		
asset_lastupdatedby		
asset_notes		
assettype_category		
assettype_class		
assettype_manufacturer		
assettype_model		
assettype_description		
assettype_id		
assettype_name		

**Controls**

sectionname		
sectionname.tabname.controlname		
Sectionname.tabname.gridcontrolname		
Sectionname.tabname.gridcontrolname.columnname		

**Additional Fields**

These are new fields, which are available in the Bundled Data from v2.0.4

Work-item-id		
Client-company-name	Client company name	
Client-ref	Client reference number	
Client-tel		
Client-type		
Client-fax		
Client-contact-email		
Client-address-property-name		
Client-address-no		
Client-address-street		

Client-address-locality		
Client-address-postcode		
Client-address-country		
Client-job-prefix		If jobs are prefixed for the client, this is the prefix used
Client-job-suffix		If jobs are suffixed for the client, this is the suffix used
Form-length		
Form-allow-part-completion		
form-automatically-complete		
form-bypass-summary-page		
Form-audit-changes		
User-office-name		The office information associated with the user who was allocated the job
User-office-shortcode		
User-office-tel		
User-office-fax		
User-office-email		
user-office-property-name		
user-office-address-no		
user-office-address-street		
user-office-address-locality		
user-office-address-postcode		
user-office-address-country		
User-display-name		Further user information on the user who was allocated the job
User-title		
User-forename		
User-surname		
User-tel		
User-mobile		
Job-reference		
Job-duration		
Job-notes		
Job-engineer-comments		
Schedule-name		Information on the schedule associated with the job
Schedule-notes		
Schedule-type		
Schedule-start-date		
Schedule-end-date		
Schedule-summaryline		

## Appendix B Question Type Examples

	Limits	Example
<b>Free Input</b>		
Textbox	Any character	Names, address elements, descriptions, generally recommended for references even if the references are always numeric
Numeric value	Any number, including decimal point	Measurements of any kind. E.g. size, quantity, age
Text expander	Any character	Any free text response that might trigger verbose values particularly for transposing abbreviations. E.g. allowing ft to transpose to feet in verbose values
Grid	Any character, any amount of columns	Any data input easily displayed for input and view in a simple grid format
<b>Selections</b>		
Dropdown list	Any character in dropdown selections	Where options exceed 2, or are not True or False, and do not vary (although free text input is optional) E.g. High, Medium, Low
Selection Choice dropdown		
Selection Choice buttons		
Checkbox		Where options are limited to True or False. E.g. Thermometer fitted?
Radio button list	Any character in radio button description	Where options exceed 2, or are not True or False, and do not vary E.g. High, Medium, Low
<b>Formatted Input</b>		
Date	Following patterns dd/mm/yy, dd/mm/ccyy	12/03/12
Time	Following 24 hour pattern	15:20
Parts List		
<b>Device Capture</b>		
Camera		Photographs taken on device
Signature	Complete free hand drawing	Signatures with stylus, free hand drawing
Video		Videos taken on device
Voice note		Audio recording taken on device
GPS Location Capture		GPS location captured by device location
<b>No Input</b>		
Label	Any character	Titles to display on device to put Question captions in context. E.g. Temperature Measurements in degrees C, might proceed H, C, M as very terse prompts for measurements of Hot, Cold and Mains temperatures.
Relational Label		For extracting known data items from the eSquiggles schema for display on the device. E.g. the company name and site contact details
Section Grid		Specialist holder for associated Repeating Section

## Appendix C Troubleshooting

### eSquiggles Form Designer

Problem	Solution

### Microsoft Word Document Templates

Problem	Solution
I can't edit a table format in my Word document	Check if the table is part of a group. If you have grouped a table you will have to ungroup it first and then you can edit it. Remember to regroup it if it related to a Repeating Section.
I can't delete placeholders in my Word document	Check if the Placeholder is part of a group. If you have grouped placeholders you will have to ungroup them first and then delete them.
Word 2007 & 2010 Lost eSquiggles component from ribbon	File, Options, Add-ins, Select Disable Items from the Manage dropdown. Highlight WordAddin and click enable.
Word 2007 & 2010 Lost eSquiggles component from ribbon and re-enable hasn't fixed it	<p>Uninstall eSquiggles components as shown Uninstall eSquiggles Add-in Component.</p> <p><u>Windows 7</u> Click on the Start Menu In the Search Programs and Files box, type <b>run</b> In the open box type <b>cmd</b> This opens a DOS command box At the DOS prompt type <b>rundll32 dfshim CleanOnlineAppCache</b> Close the DOS window</p> <p><u>Windows Vista</u></p> <p><u>Windows XP</u></p> <p>Reinstall eSquiggles component as shown Install</p>
Word 2003 Lost eSquiggles component from menu	
I can't see my Form in the Form dropdown in the eSquiggles Word add-in component	<p>Check that the Form you want to use is Published.</p> <p>If you connected to eSquiggles in Word before you Published the Form for the first time then eSquiggles will not know about the Form. Refresh the Form list by reconnecting to eSquiggles, refer to Connect to Your eSquiggles Environment</p>
I can't see new Sections, Tabs or Fields in the selected Form in the eSquiggles Word add-in component	<p>If you updated your Form make sure you have Published the updates.</p> <p>If you connected to eSquiggles in Word before you Published the changes, click on Refresh Data in the eSquiggles Forms component in the</p>

	Ribbon. This will get the latest changes to your Form.
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