Formworks v6
Reporting Hub
User Guide

Formworks

Contents

Getting Started With the Formworks Reporting Hub

Introduction

The Formworks Reporting Hub uses a client's Microsoft Azure Cloud storage account to provide permanent data storage for documents exported by Formworks.

You can allocate multiple report layouts and output formats to each published Formworks template, and allocate multiple reporting schedules and distribution points to each report layout.

You can view summary data, bar charts, filter by users and Formworks templates, and even drill down to view PDF's of individual forms and stored documents and view maps indicating where forms were generated.

Using the reporting features, you can create report definitions that can either be run immediately, or scheduled to run at predetermined times, and cover predefined periods, for example, week, month or year to date.

The reports are run against individual Formworks templates, and can include any fields that you specify, displayed in any order, and renamed to any other title as required.

The Reporting Hub supports multiple output formats, and can deliver your output to multiple email addresses, or can download your reports to a local computer, or Dropbox folder.

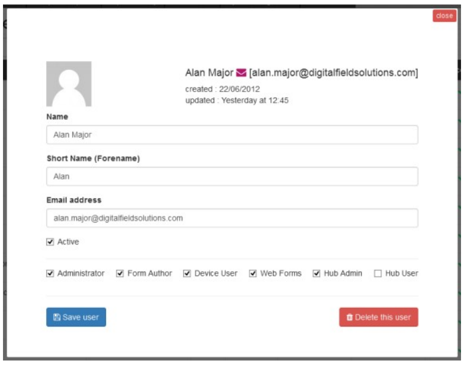
You can search submitted forms on a unique field specified in the Formworks Template Builder.

Having located a form, you can direct it to any iPad / device user, who has the correct authorisation in Formworks. This produces a copy of the original form, populating the Prefill folder of the iPad, and creating a history of 'amendments' to the original document.

Note: The Reporting Hub does not provide access to unpublished (Design mode) templates.

Security Rights

You use the same login credentials for the Reporting Hub, as you use to access Formworks. You mustalso set the degree of access a user has to other user's forms within the Formworks User Record. If the user should only be able to view and report upon their own forms, place a tick in the Hub User check box on the User Record.



If the user should have access to all forms submitted by all users, place a tick in the Hub Admin check box. Please note that if you place ticks in both Hub Admin and Hub User, the lower of these security levels will be assumed, and the user will only be permitted to see their own forms.

Accessing the Reporting Hub

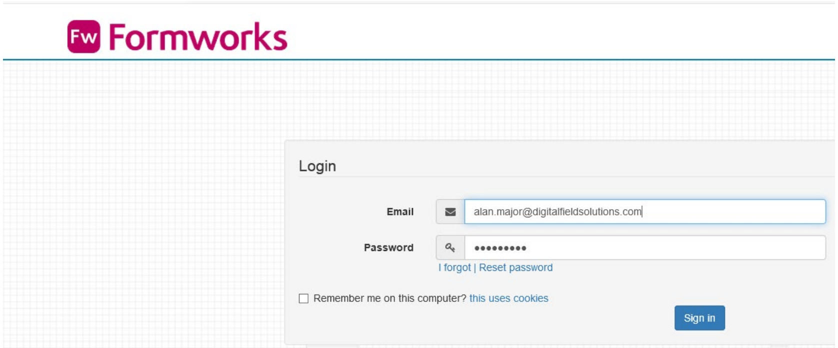
The Reporting Hub can be accessed via the

following link:

https://hubv2.formworks.uk.com/

The Formworks Reporting Hub login page will display. From here you can either log into the ReportingHub, or if you have forgotten your password, you can request a password Reset email.

Enter the email address assigned to you within Formworks, followed by your usual Formworks password.

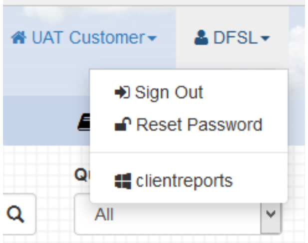


Select to remember the login details by placing a tick in the "**Remember me on this computer**? Checkbox.

Click the **Sign in** button.

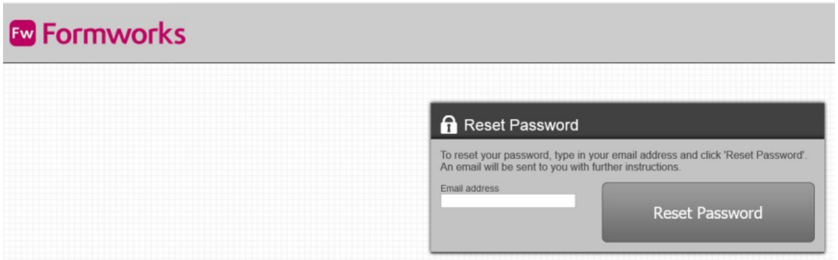
Changing passwords

You can request a password Reset from either the Reporting Hub login screen, or once you havelogged in, from the drop down options for the user login, at the top right of the screen.



Either method will take you to the standard Formworks Reset Password screen.

- Enter your Formworks email address, and select Reset Password.
- An email containing a key and URL link will be sent to the email address.

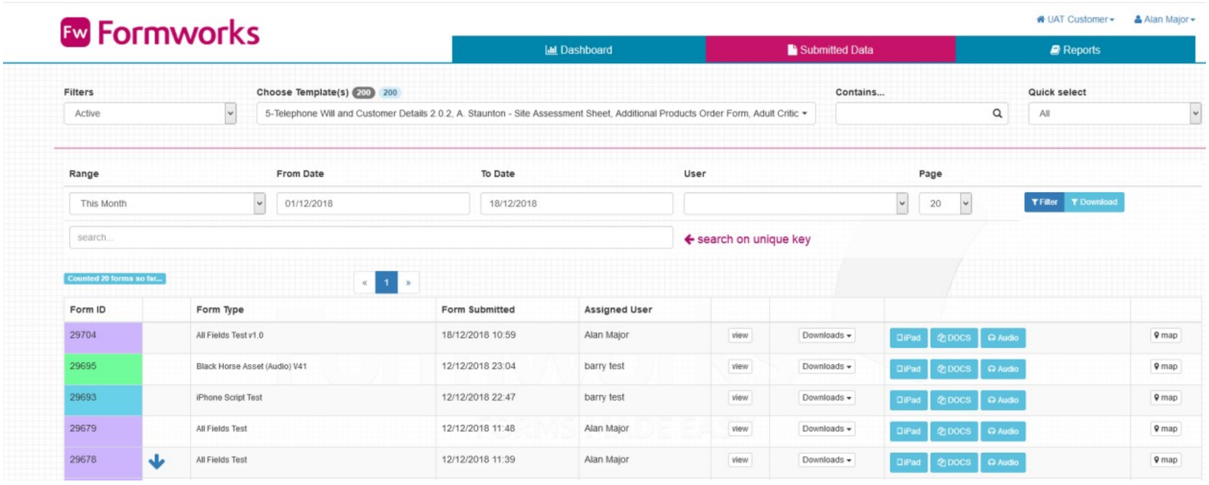


- Copy the link to the clipboard
- Click on the link.
- Follow the instructions on the screen;
  - Paste the key from the email into the first field.
  - Enter your new password
  - Confirm the password.

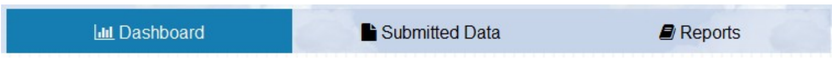
The Formworks Reporting Hub

Introduction

When you first log into the Reporting Hub, the screen will appear similar to this, with the SubmittedData tab visible and a date range of the current month selected.



The Formworks Reporting Hub is divided into three main sections, Dashboard, Submitted Data, andReports.



Access to these sections is provided by the tabs at the top of the screen.

Dashboard, *Submitted Data* and *Reports* tabs are briefly described below, and in detail within their own chapters in this guide.

Dashboard

With its bar charts, the Dashboard provides a quick and convenient method of viewing overall statistics for a range of form templates and the facility to drill down through this data.

Submitted Data

The **Submitted Data** screen is loaded by default. This provides an in depth view of the individual forms that have been submitted by users. Here you have the option of searching for forms, directing previously submitted forms to a user's iPad, so that further information can be appended, and downloading data for both individual forms, and a range of forms, in various formats, and viewing maps that show the locations where forms were generated.

From here you can also produce Excel worksheets that contain the output from multiple Formworks template types.

Reports

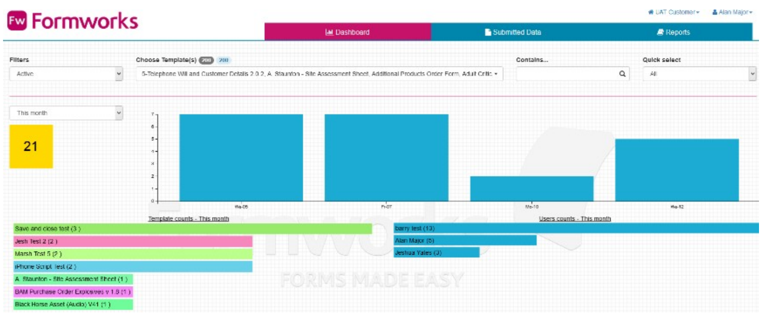
In the Reports section you can create multiple report layouts and schedules against published Formworks templates. Report layouts can include any fields from the form template, arranged in any order and renamed as required. You can create multiple report layouts for each Formworks Template, and allocate multiple reporting schedules for each report layout.

For example, a Job Sheet template might support two different report layouts; one with only the key fields from the original form template and a second containing all the fields.

Each report layout could then support two schedules - one scheduled to run daily, the second to run once per week. Both schedules could contain different recipients and be produced in different outputformats.

Dashboard

You select the Dashboard from the first tab at the top of the screen. You use the filters to limit the number of forms included in the display and graphs. Setting the filters, in this instance all forms for 'This month', will display the total number of forms selected and analyse them by Formworks template type, on the left and by numbers of forms submitted by individual users on the right.

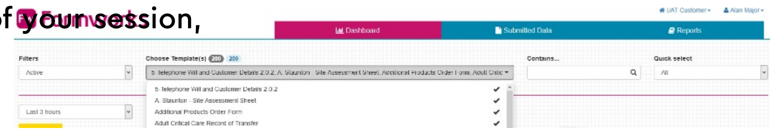


Filters

Filters let you refine your listing by template type, users and dates.

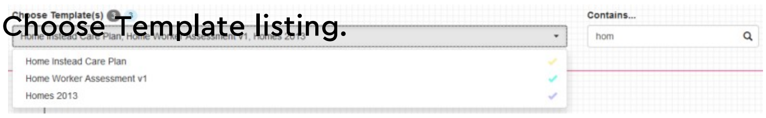
Choose Template

Select and deselect from the list of available templates. Random colours are allocated to templates for the duration of your session, and these correspond to the colours displayed next to the template name.



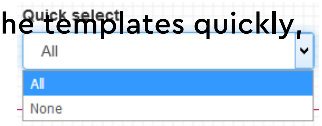
Contains

Typing any of the letters contained within the templates name will filter the templates displayed within the Choose Template listing. You only need to enter the characters, searching is performed automatically.



Quick select

You can use the Quick select option in combination with the other filters. For example, you could select the None option, to deselect all the templates quickly, then use the
Choose Template listing to select an individual template.



User counts

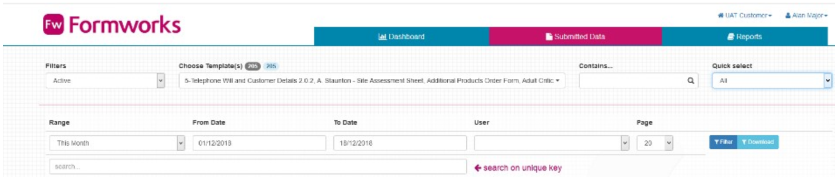
Selecting an entry from the User Counts horizontal bar graph on this screen will automatically take you to the *Submitted Data* tab with the Submitted Data filters set from your Dashboard options.

Submitted Data

The Submitted Data tab can either be selected directly, or accessed by selecting a user's name from the horizontal bar chart in the Dashboard screen. If accessed from the Dashboard screen, it will be prepopulated with the templates, date ranges and users selected in the Dashboard screen.

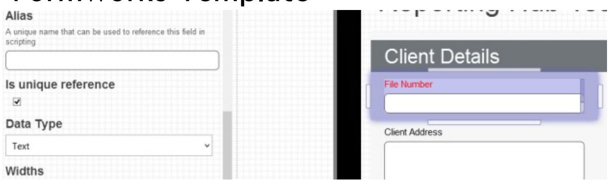
Filters

You can use the filter options to select between Active or Retired templates, individual or a range of templates, various date ranges and individual Users. The Page option allows you to choose how many form data lines appear on a screen, before you need to use the next and previous buttons to view them. The Filter button can be used to instruct the Reporting Hub to search on the filters selected, but this is normally initiated automatically when you choose the various options.



Search on unique key

The Search on unique key facility lets you filter your forms by a key reference field, previously specified and configured on the Formworks Template Designer, using the “Is unique reference” check box. As the name implies, the values entered into this field must be unique for that template.



An order number might be appropriate, whilst a customer number, where further orders may be generated using the same reference, would not be suitable.

Download

The Download option at the top right of the screen, enables you to generate a report based on the forms currently selected by the display options. If multiple template/form types have been selected and the CSV download option employed, a separate CSV file will be generated for each template type. If XLSX is selected, the Excel output file will be comprised of multiple tabs – one for each form template type.

Submitted Data – Screen Layout

The Submitted Data table area contains data fields, list boxes and icons:

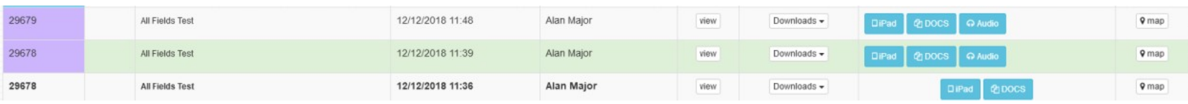
Form ID		Form Type	Form Submitted	Assigned User				
29711		All Fields Test v1.0	18/12/2018 16:31	Alan Major	view	Downloads	iPad DOCS Audio	map
29704		All Fields Test v1.0	18/12/2018 10:59	Alan Major	view	Downloads	iPad DOCS Audio	map
29695		Black Horse Asset (Audio) V41	12/12/2018 23:04	barry test	view	Downloads	iPad DOCS Audio	map
29693		iPhone Script Test	12/12/2018 22:47	barry test	view	Downloads	iPad DOCS Audio	map
29679		All Fields Test	12/12/2018 11:48	Alan Major	view	Downloads	iPad DOCS Audio	map
29678		All Fields Test	12/12/2018 11:39	Alan Major	view	Downloads	iPad DOCS Audio	map

Form ID

The Form ID is the unique Formworks form identifier, allocated to a form after it has been submittedby the iPad. This identifier is unique within each Formworks client.

Down Arrow Icon - Previous form submissions

The down arrow may be present in the second column of a forms entry. This icon indicates that the form has been submitted more than once. For example, if the form has been submitted from an iPad, then reopened, edited and resubmitted. In the screen capture, Form ID 29678 is an example.



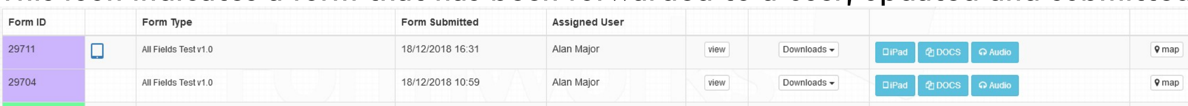
29679		All Fields Test	12/12/2018 11:48	Alan Major	view	Downloads	iPad DOCS Audio	map
29678		All Fields Test	12/12/2018 11:39	Alan Major	view	Downloads	iPad DOCS Audio	map
29678		**All Fields Test**	**12/12/2018 11:36**	**Alan Major**	view	Downloads	iPad DOCS	map

Selecting the blue arrow will display the previous submissions of the form. In the second screen capture, you can see there are now two entries for 29678. This provides a version history for each individual submission of a form.

The form will only appear once per report and will ALWAYS display the current position for the form, irrespective of whether the report is run for a prior point in time. In other words, for reporting purposes, the form only contains its current value, not a history of its value changes.

iPad Icon

This icon indicates a form that has been forwarded to a user, updated and submitted



Form ID		Form Type	Form Submitted	Assigned User				
29711		All Fields Test v1.0	18/12/2018 16:31	Alan Major	view	Downloads	iPad DOCS Audio	map
29704		All Fields Test v1.0	18/12/2018 10:59	Alan Major	view	Downloads	iPad DOCS Audio	map

by them. The icon does NOT appear against the original form. A user would submit a form from the iPad, then a Reporting Hub admin user would select the form and use it to forward a pre-populated 'copy' to either the same, or a different user. Previous submissions of the form remain unchanged, and a new instance of the form is created on the Reporting Hub with each submission, thereby maintaining a version history. Full details of the re-export function are described below in this guide.

Form Type

The Formworks Template name. Only published, or published and retired forms are available in the Reporting Hub.

Form Submitted

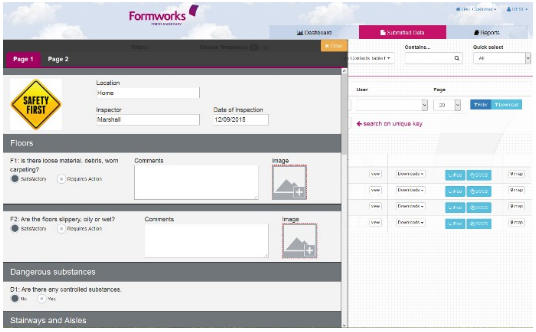
The date and time that the form was completed on the iPad.

Assigned User

The name of the user who submitted the form.

View

The facility to view an image of a submitted form. The viewed image will appear identical to the viewthe device user would have had, with sections and fields that were hidden at submission, also being hidden in the view. If the form contains multiple pages, you can move between these at the top of the display. To close the view, select the Close option at the top, right of the display.



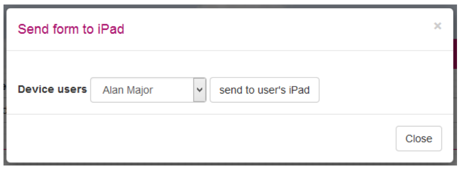
Downloads

The downloads list box provides options to export the selected form toone of four formats;

- PDF Form Layout, which would appear as the form does on s
- PDF List Layout, is a simple listing format, with field names on theleft, and values to the right on the output.
- CSV is standard Comma Separated Values format.
- XLSX will produce an Excel file with links enabling you to view images and signatures.

iPad Download Icon

Selecting this icon gives you the option of prefilling a form on the selected user's iPad, with all the data from the currently selected form. The original form itself remains unaltered on the Reporting Hub, and a new form is created, with its own unique Form ID. The new form is effectively a prefill, and will appear in the Prefill directory onthe selected user's device.



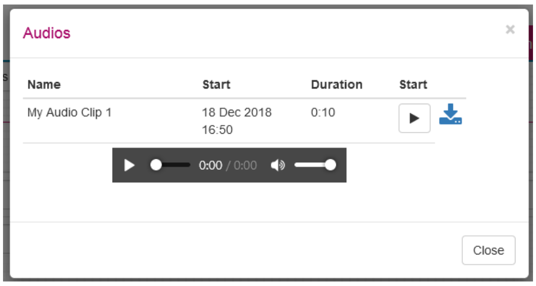
The NEW form that was generated and will contain the prefill information, will in future have an iPad icon following the Form ID, and hovering over the icon will display details of who created the prefill instruction, and the Unique ID of the original form.

Docs

The Docs option details all the files that have been stored against a particular form. In this example,that includes a PDF, the XML generated for the form, and a jpeg image file of the client's signature. Any of these files can be viewedby selecting them.

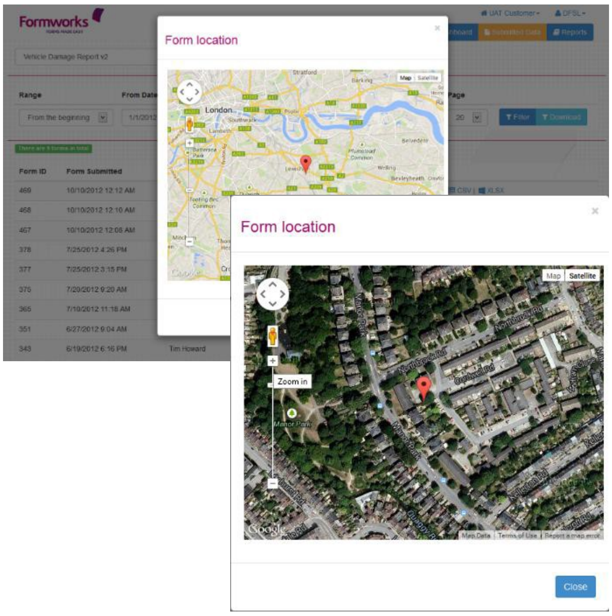
Audio

The Audio button will display any audio clips that have been recorded against a form. You can playthe audio clip by clicking either of the run buttons.



Map

The last icon on each data line, 'map', displays a map overlay based on the latitude and longitude where the form was started. The map includes the standard options, of moving around the location, moving the view closer, and switching to satellite view. Location services must be enabled on the device for this feature to work.



Reports

Overview

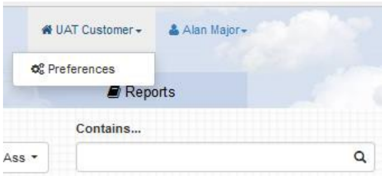
Each form template can have multiple report layouts associated with it and each report layout can have multiple schedules associated with it. It is important to understand the difference between report layouts and schedules. A report layout contains the form fields that are to be included in your output, and their ordering and column heading name to be used, if the actual template field name is inappropriate for the report. Schedules specify information, such as when a report is to be produced, what period it covers, the output format and the email distribution list.

Reports tab

The Reports tab allows you to create reports that can be scheduled to run automatically, for example each evening and Ad-Hoc reports that are run on demand. You can also run scheduled reports on- demand.

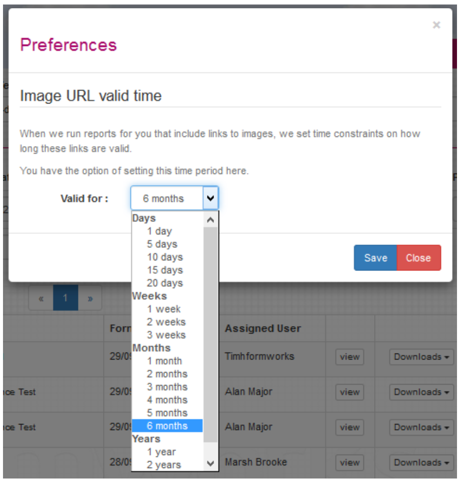
Preferences

Your company name will appear as a drop down list option, at the top right side of the screen. Selecting this displays the Preferences option.



Certain report output formats may contain links to images. For example, a cell in an XLSX format report may contain links to photographs or signature images. These links have a limited life time, after which they expire and the report would need to be regenerated to enable a user to view the images again.

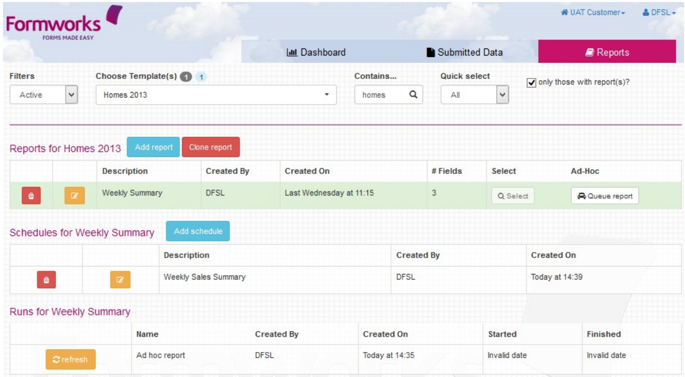
You use the Preferences option to set the active life period for these image links. Within this period you will be able to use the links to access linked images.



Screen Layout

The Reports tab is divided into four areas: The Filters section, Report Layouts, Report Schedules and Ad-Hoc reports that have been generated.

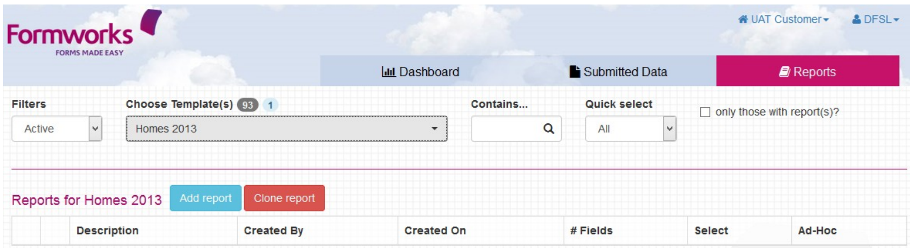
These four areas can be seen in this capture.



Note that even if you have only created one report layout, you still need to click on the Select option to view its schedules and Add-Hoc reports.

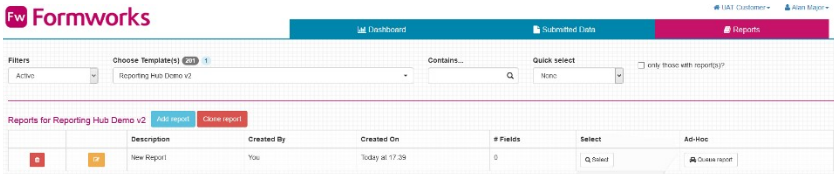
Filters

The filters section at the top of the Reports tab are similar to those on the Dashboard and Submitted Data tabs. The only exception is the "only those with report(s)? check box. This checkbox limits the number of Formworks form templates in the Choose Template(s) listing to those templates that have a report layout.

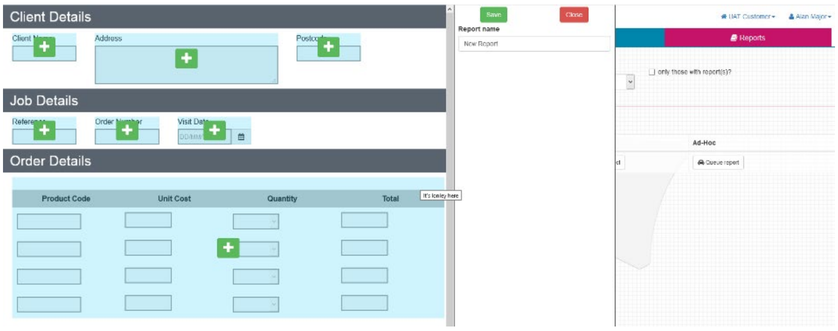


Creating a New Report Layout

Click the Add Report button to start. A blank report layout with the Description of New Report will becreated and listed in the reports area.

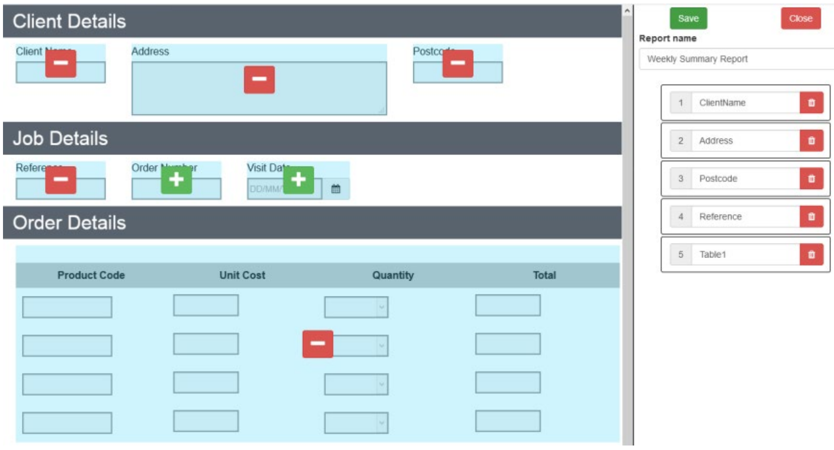


Select the yellow pen icon to edit the blank report layout. An image of the Formworks form templatewill be displayed on the left of the screen, and the layout of the report will appear on the right.



Click in the New Report field, and change the title of the report as required – Weekly Summary Reportin this case.

Select the template fields for your report, by clicking on the green plus icons to add them and the red minus icons to remove them. You can also remove fields from your report by using the dust bin icon next to the field name on the actual report layout.



Renaming and Repositioning fields

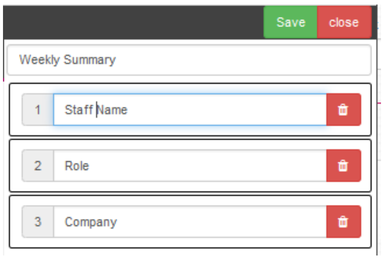
You can reposition your report fields by selecting them and dragging them to the correct position. You can also rename fields or place spaces in them to make them more readable, simply by selecting them from the fields list on the right side of the screen. Alias names are used as column headings if available, if not, the elements name property. If neither are available, the fully qualified field name is used.

Fields Contained in Tables

You cannot select individual fields within a table element. You must either select all of them or none. In this example, all the fields within the Order Details table have been include. This appears as item 5, Table1 in the report layout on the right. Column headings in the output files would be named using elements alias property first and if not provided, the elements name. If neither of these are provided, the column heading in the output will be blank – the fully qualified field name is not used.

Editing Field Names

When you have all your fields present on the report layout, you can edit any of the field names tosomething more appropriate, if required. In this instance I have changed Name to Staff Name.



Reordering Field Names

You can reorganise the order that field names appear in your reportby dragging them up or down.

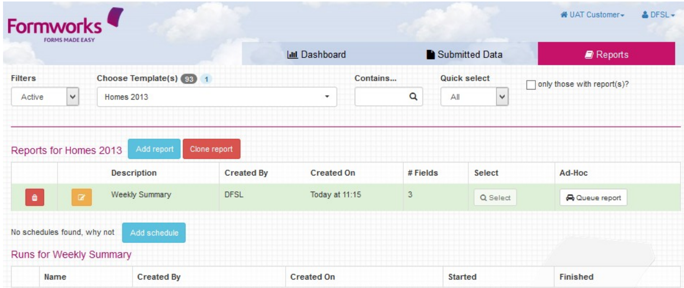
Saving the Report

When you have the required report name, field names and field order, select the green **Save** button. You will be notified that the report layout has been saved. Select the red **Close** button to return you to the Reports tab.

You can always edit the report, by selecting the yellow pen icon, and repeating the steps above.

Adding a Schedule

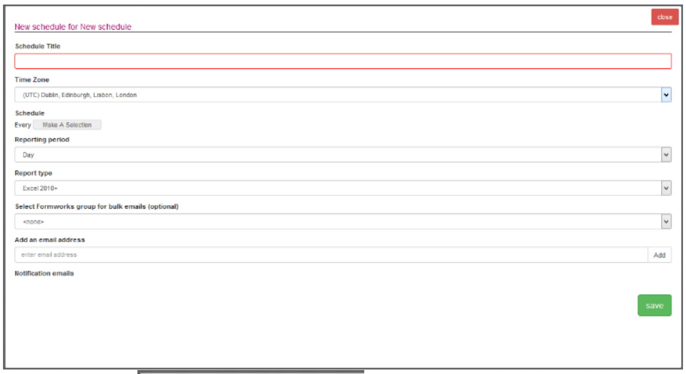
The Schedules tab provides the functionality to create schedules and associate them with a report layout. Using a schedule, you can control what time of day your reports are run, what period (date range) of forms the report includes, the format of the output, for example CSV, and allocate multiple email recipients.



Add Schedule

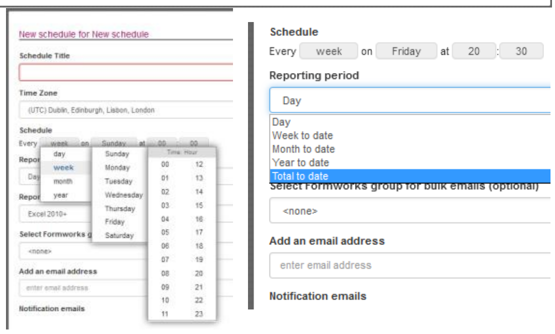
Click the **Select** button against the report that you wish to add a schedule to. A schedules table will display, with the blue **Add schedule** button.

Select the **Add schedule** button. A screen provides the options to give your schedule a Title, set yourtime zone, and choose how often you want your report to run.



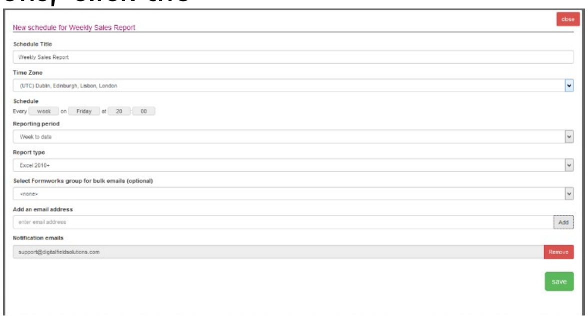
You can select when you want the report to run, for example, every day, week, month or year and when.

Specify the time you wish it to run. Specify the date range of forms to beincluded in the report, for example, week to date, month to date, or all forms submitted.



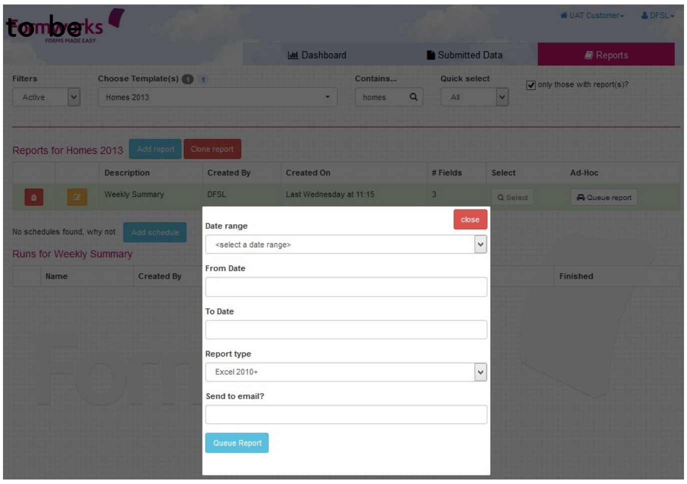
Build your email distribution list by either selecting a group from Formworks, or by entering individual email addresses and clicking on the Add button. You could select a Formworks group, and then include a number of individual email addresses in this way.

Your completed schedule screen should appear similar to this capture when you are finished. Whenyou have set all your options, click the **Save** button.



Ad-Hoc Reports

Ad-Hoc reports use a report layout that you have previously created, but they do not require a schedule. They are queued to be generated on demand.

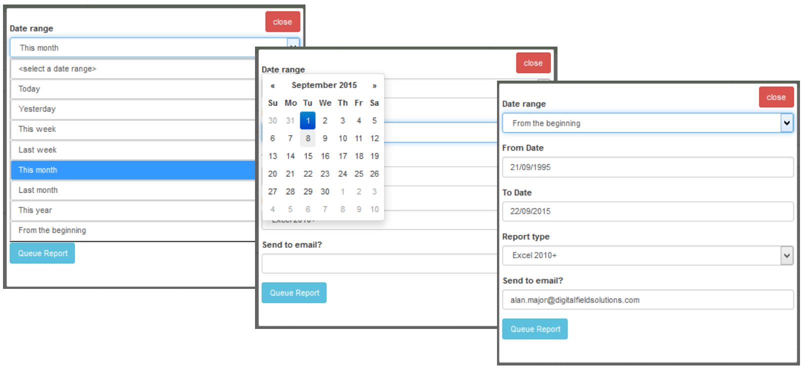


Select the **Queue report** button, at the end of the report layout's line on the table of reports. The screen will appear like thecapture.

Date Range

Date ranges can be set by either clicking on the Date range list box, and selecting from the available options, or clicking in the From Date and To Date fields and selecting a date from the pop-up calendarcontrols.

The completed Ad-Hoc report request should appear similar to the capture.



Add-Hoc Report Listings

Historic Add-Hoc reports that have been run, are listed in the bottom section of the Reports tab.

Note that you have to click the Select button against a Report layout, to view Add-Hoc reports, even if there is only oneReport layout present.