





# MOBILE FORM SETUP GUIDE



*NOTE: APPENDICES INCLUDED WITH SCREENSHOTS*



# CREATE MOBILE FORM TEMPLATE

Import an Existing Form		Create a new Form Template	
Log into Web2 application (e.g. 10.1.1.22:8019) NOTE: Ask Technical Support to reset your login information if necessary			
Navigate to “Forms Repository”: Forms > Forms Repository			
Select “Templates” menu item			
Select the 3-horizontal bars button 		Select “Add” menu item next to the “Template” selection OR  the 3-horizontal bars menu listings (choose default “Form Template”) <ul style="list-style-type: none"><li>NOTE: Using the default “Form Template” does not allows you to resize the canvas base on a list of selected devices</li></ul>	
Navigate to and select “Import” option <ul style="list-style-type: none"><li>Forms &gt; Import</li></ul>		Find and select a blank image or document file that would serve as the background of the mobile form (eg. DailyCheckOut_bg.jpg)	
In the Import dialog box, <ul style="list-style-type: none"><li>“Browse” your file directory and select the zipped file of the existing form template (e.g. forms_export.zip)</li><li>Check the box, “Include Content Tags?” then hit “Import” button</li></ul>		The newly added file should show in the grid: <ul style="list-style-type: none"><li>Double-click the box in the “Description” column to enter a user-friendly display name for the form template (eg “Daily Check Out”)</li></ul>	
Refresh the view and the newly import form template should show up in the grid			

# SETUP MOBILE FORM TEMPLATE

## CONFIGURE SETTINGS FOR FORM TEMPLATE

Select “Templates” and “Detail” items from menu options

Select the form template (eg DailyCheckOut.jpg) from grid

In the “Detail” pane on the right:

- Navigate and select subtab for “Form”
- Check the “Form” box, a hyperlink to “Run Form Designer” should appear
- Check the “Mobile” box then select the appropriate user in the “User Group” dropdown selection (e.g. All Users)
- Hit “Save” button at the bottom of this subtab

# DESIGN MOBILE FORM TEMPLATE

## CREATE FORM FIELDS AND LAYOUT DESIGN

<CONTINUED> In the “Detail” pane on the right:

- On the “Form” subtab, click on the “Run Form Designer” link to the right of the “Form” checkbox. NOTE: A new browser tab should open for the “Form Designer” page

Form Designer page: Select a Form Handler Type [optional]

- Select “Properties” from top menu list
- In the “Form Properties” dialog box, under “General” subtab:
  - Choose the desired form handler available from the dropdown list (eg Time Entry Sheet)
  - Click “Ok” to exit dialog box

Form Designer page: Add Field(s) to Form Template (**see appendix for screenshots**)

- Select the “Add Fields” option
- Click anywhere on the blank canvas to add a field. A set of field properties is displayed on the window pane on the right. Configure these settings as needed. NOTE: Move fields around to achieve the desired look/layout.
- Under “ID” property, field names in red font are required for the chosen form handler. Required fields must be added to the form.
- Select the “Add Submit” from the top menu list then click anywhere on the canvas. Configure field as needed
- Select the “Add Cancel” from the top menu list then click anywhere on the canvas. Configure field as needed
- Hit “Save” option from top menu list to capture your changes

# PREVIEW MOBILE FORM – desktop version

## PREVIEW FORM ON MOBILE DEVICE

Navigate back to Web2 application: Forms > Forms Repository > Templates

<CONTINUED> In the “Detail” pane on the right:

- On the “Form” subtab, click “Resend” button below the “Mobile” section to sync the latest updates on the form design

Navigate to RedSky Mobile App Client (RMC) for Desktop (**see appendix for screenshots**)

- Desktop version can be accessed via url <<web server ip address/domain name>>/tools/RMC/client
  - For example: **10.1.1.22:8019/tools/RMC/client**
- Register Device & Log in using web2 credentials
- Wait for home page to load all available mobile forms (note: it’s been known to take up to 2 minutes to load)
- Select one of the folders available (e.g. Forms)
- The “Forms” landing page is displayed with any available form templates
- Select one to create/enter a “NEW” record (note: items on the landing page without the “New” prefix means it’s an existing record that was created but not submitted).

# PREVIEW MOBILE FORM – mobile device version

## PREVIEW FORM ON MOBILE

Download Cisco AnyConnect mobile

- Open mobile app
- Configure to server address: **vpn.ecmserp.com**
- Enable connection by clicking on AnyConnect slider
- Store network username and password

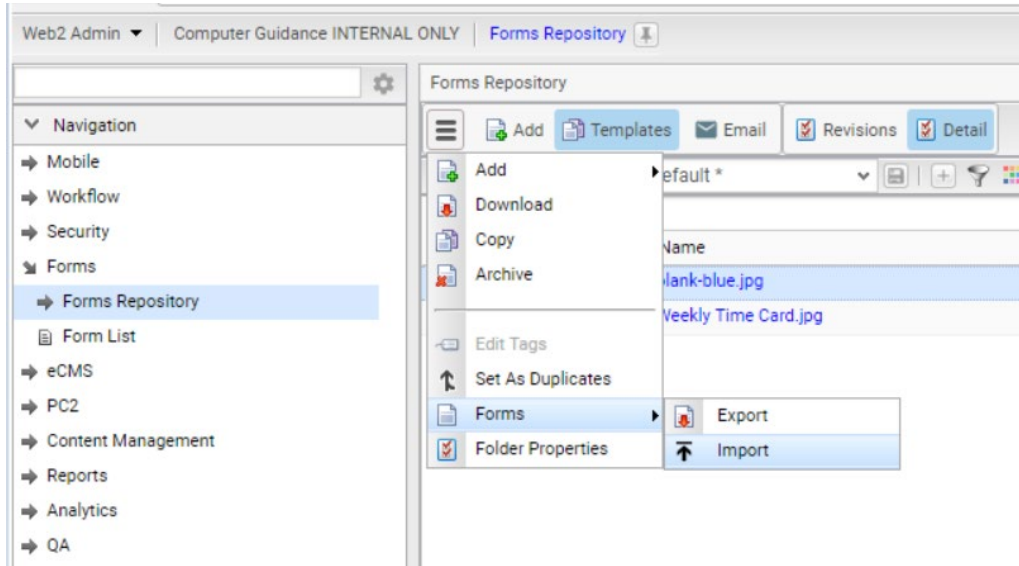
Open mobile browser

- Navigate to the test url site (e.g. 10.1.1.22:8019/tools/rmc/client)
- Log on using web2 credentials
- You may get a message stating the site is not configured for this browser. If so, select option to Add to Home Screen
- Exit browser and notice a mobile App, RMCv2, has been added to your phone

Open the RMCv2 mobile app

- Proceed to login and test...(note: see instructions for “Preview Mobile Form - Desktop Version” for details)

# APPENDIX: WEB 2 – FORMS REPOSITORY



# APPENDIX: FORMS REPOSITORY DETAIL PANE

The screenshot displays the 'Forms Repository' application interface. At the top, there's a navigation bar with tabs: 'Add', 'Templates', 'Email', 'Revisions', and 'Detail'. Below this is a toolbar with icons for various actions. The main area is divided into two panes. The left pane shows a list of documents with columns for 'Name' and 'Description'. The right pane provides detailed information for the selected document, 'blank-blue-bg.jpg'.

Name	Description
blank-blue-bg.jpg	Daily Check Out
formtest.png	Testing
blank-blue.jpg	Daily Check In
Weekly Time Card.jpg	

**Document Details for blank-blue-bg.jpg:**

- Description: Daily Check Out
- Revision: 0
- Last Changed By: AD - Web2 Admin
- Last Changed: 06/04/2018 14:22
- File Size: 6.74KB (6,901 bytes)
- Indexed: ☐
- Reference:
- Revision Ref:
- Revision Date:

**Form Configuration:**

- Form: ☒ [Run Form Designer](#)
- Master:
- Mobile: ☒
- User Group: \_ALL (All Users)
- Use Tabs: ☐
- [Mobile Form XML](#)

Buttons at the bottom: Resend, Save.



# APPENDIX: FORM DESIGNER

The screenshot displays the 'Form Designer' application window. The main workspace shows a light blue form layout with several fields and buttons. A 'Form Properties' dialog box is open, showing the 'General' tab with 'Form Handler Type' set to 'Time Entry Sheet'. The form layout includes a 'Check Out' button, a 'FIELD4' label, a 'FIELD\_NUMBER' label, an 'Employee Name' label, a 'FIELD10' label, a 'Submit' button, and a 'Cancel' button. The right sidebar contains a table of field properties.

ID	FIELD1
Field Title	Daily Check Out
Field Type	Label
Top	12
Left	233
Width	154
Height	29
Align	Left
Tab Order	2
Lookup SourceField	
Lookup Value	
Advanced Settings	Assign

# APPENDIX: SEARCH APP FILTERS

Form Designer

Save Delete Properties Add Fields Add Submit Add Cancel Add Print

Daily Check Out

Enter Company / Division: COMPNO DIVNO

Select Personnel PERSONNEL\_NUMBER Employee N

Check Out Date / Time

LAST\_DAY\_OF\_WEEK FIELD10

Submit Cancel

Search App Parameters

Parameters

COMPANYNO DIVISIONNO COMPANY

Filters

Column: Add

Src Com {COMPNO}

Src Div {DIVNO}

Save Cancel

ID PERSONNEL\_NUMBER

Field Title Personnel Number

Field Type Text

Numeric

Multiline Text

<None>

114

219

154

29

Left

1

ecms/Payroll/Employee

Assign

# APPENDIX: LOOKUP SOURCE/VALUE/FILTERS

Form Designer

Save Delete Properties Add Fields Add Submit Add Cancel Add Print

Daily Check Out

Enter Company / Division: COMPNO DIVNO

Select Personnel PERSONNEL\_NUMBER Employee Name

Check Out Date / Time

LAST\_DAY\_OF\_WEEK FIELD10

Submit Cancel

Template App

Template :

Arguments

Add

{PERSONNEL\_NUMBER}

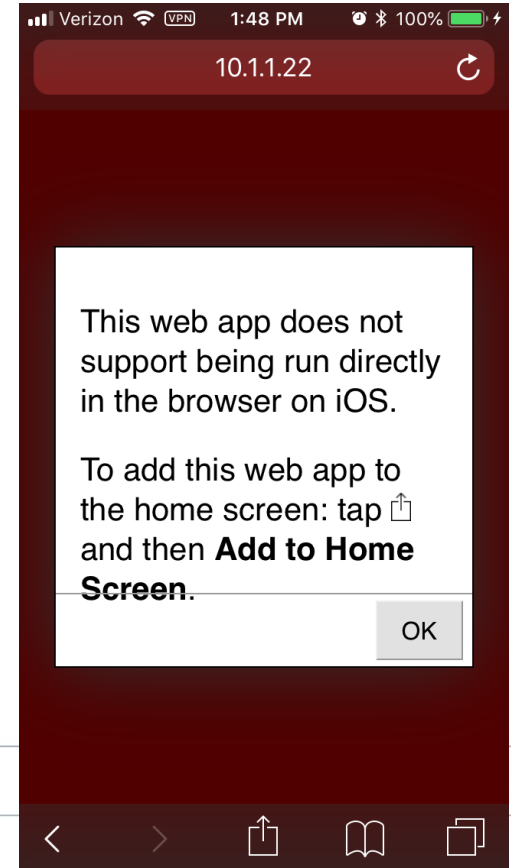
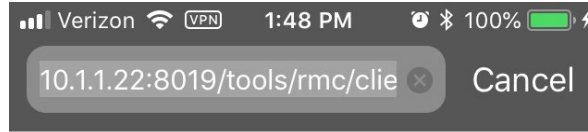
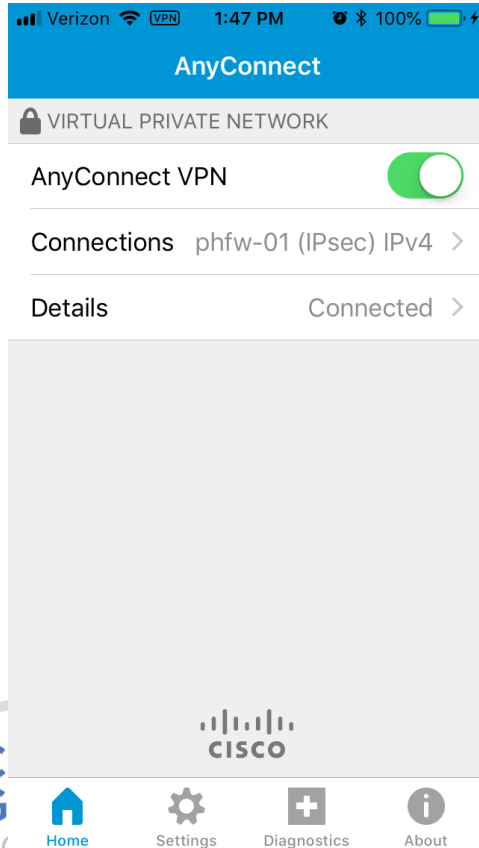
{COMPNO}

{DIVNO}

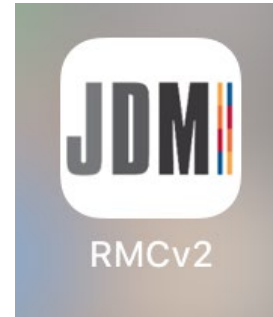
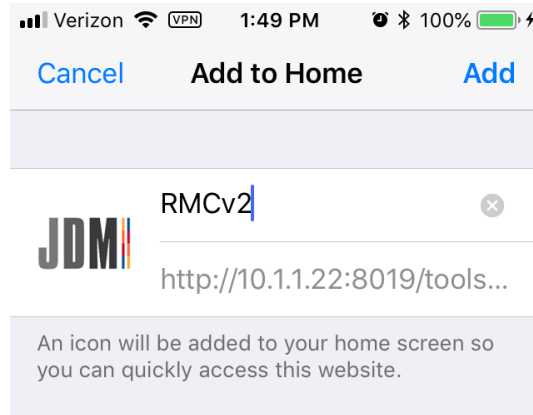
Save Cancel

ID	FIELD7
Field Title	Employee Name
Field Type	Label
Top	116
Left	385
Width	99
Height	29
Align	Left
Tab Order	7
Lookup SourceField	PERSONNEL_NUMBER
Lookup Value	EMPNAME
Advanced Settings	<a href="#">Assign</a>

# APPENDIX: MOBILE APP DOWNLOAD



# APPENDIX: MOBILE APP DOWNLOAD



# APPENDIX: DEVICE REG & LOGIN

**Device Registration**

User

Password

Cloud ERP.

Login

**XCIPIO**  
*mobile*

*powered by*

**COMPUTER  
GUIDANCE**  
CORPORATION

© Computer Guidance Corporation



# APPENDIX: HOME & “FORMS” PAGES

Logout   **Mobile Functions**   ●   ☰

Forms   3 >

[Blue Content Area]

< Mobile...   **Forms**   ●   ☰

Description

- New Weekly Time Card.jpg
- New Daily Check In
- New Daily Check Out

< Forms   **Form**   ★   ●   ☰

Daily Check Out

Enter Company / Division:   0   0

Select Personnel   [Dropdown]   ...

Check Out Date / Time

mm/dd/yyyy   v   hh:mm   Now

Submit   Cancel

# APPENDIX: RESET RMC CONFIGURATION

