



**FORMS
USER GUIDE**

Version 1.4



DOCUMENT CONTROL

Document

Forms User Guide

Current Version

Version	Date	Issued Pages	Reason For Issue
1.4	April 2024	All	Logo updated

Previous Versions

Version	Date	Issued Pages	Reason For Issue
1.3	April 2024	All	General updates. Completing the form in the app, reviewing on laptop
1.2	May 2022	All	Location of Forms icon, moving between questions
1.1	Mar 2022	All	Multiple copies of forms allowed
1.0	Mar 2022	All	First issue

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1. INTRODUCTION

1.1 Using forms

The Forms module in Alpha Tracker allow you to define your own standard question sets as form templates, and for these forms to be available for completion from a project in Alpha Tracker or from the Alpha Tracker Mobile app. You might, for example, want to set up form templates for Risk Assessments, for Equipment Inspections, for Audits, for Investigations, for Disability Audits... for any purpose.

You define the content of the form templates, this includes the sections, the questions within each section, and how the questions can be answered.

You can then specify which forms should be available by default on a project. For example, if you set up projects for Disability Access, then you might want to specify that your “Disability Audit Access” form is always available to projects of this type.

It’s easy to complete a form too – either online or by using the Alpha Tracker Mobile app. Online you simply click the **Forms** button from the project, choose the form and answer the questions. From the Alpha Tracker Mobile app, you first need to have an appointment booked in your calendar for the project, and can then tap **Forms** to select and fill in the available forms. Synchronise your data to send it into the project. You can even generate a report of the answers if you have a template setup.

2. SETTING UP FORMS

There are three parts to the setup of forms:

- defining the content of the form templates, ie the sections and the questions within each section
- defining additional sets of possible answers to questions, eg one set of possible answers might be Yes, No, NA and another set might be High, Medium, Low
- linking the form templates to project types to specify when they should be available.

2.1 Setting up the form templates

Setting up a form template involves defining the sections it is to contain and specifying the questions in each of the sections. There are a number of settings that you can choose for each question, for example to define the possible answers or to indicate whether an answer represents a pass or a fail.

2.1.1 Creating a form template

To create a new form template:

1. Open the General submenu from the Setup menu and select “Form Templates” to display the Form Templates screen.

Date Created	Created By	Form Name	Notes	Active	Delete
28/01/2022 11:16	Dan	Fire Risk Assessment		<input type="checkbox"/>	Form Definition
28/01/2022 11:19	Dan	Domestic Fire Risk Assessment		<input checked="" type="checkbox"/>	Form Definition
28/01/2022 11:19	Dan	Fire Risk Assessment		<input type="checkbox"/>	Form Definition
28/01/2022 11:19	Dan	Health & Safety Inspection		<input checked="" type="checkbox"/>	Form Definition
28/01/2022 11:19	Dan	Incident investigation		<input checked="" type="checkbox"/>	Form Definition
28/01/2022 11:19	Dan	Comprehensive Office Risk Assessment		<input checked="" type="checkbox"/>	Form Definition
28/01/2022 11:19	Dan	Scaffolding Inspection		<input checked="" type="checkbox"/>	Form Definition
28/01/2022 11:19	Dan	Disability Access Audit		<input checked="" type="checkbox"/>	Form Definition
28/01/2022 11:19	Dan	Test Audit		<input checked="" type="checkbox"/>	Form Definition
28/01/2022 11:19	Dan	Fire Risk Assessment old		<input type="checkbox"/>	Form Definition
* 10/03/2022 15:43	Dan			<input checked="" type="checkbox"/>	
* 10/03/2022 15:43	Dan			<input checked="" type="checkbox"/>	
* 10/03/2022 15:43	Dan			<input checked="" type="checkbox"/>	

2. Add a new form template by typing its details into one of the three blank rows at the bottom of the screen. You can:

- enter a name for the form in **Form Name**
- enter any notes about the form in **Notes**
- tick the **Active** box to indicate whether the form is currently live.

3. Save the new record.
4. Click the **Form Definition** button on the new record to display the Form Definition screen for the template.

You can now set up the sections for your form.

2.1.2 Specifying the form sections

The sections in the form template serve to group together sets of questions. To define the sections for a new project type:

1. Add a new form template on the Form Templates screen and click the **Form Definition** button to display the Form Definition screen.



Refer to Section 2.1.1, Creating a form template, for details on how to add a new form.

The screenshot shows the 'Form Definition' screen with two main columns. The left column is for 'Section' and the right column is for 'Question'. Both columns are currently empty, displaying 'No records in list.' at the bottom. The top navigation bar includes 'Home', 'Form Templates x', and 'Form Definition - Ladder Check x'. At the bottom, there are buttons for 'Add Section', 'Edit Section', 'Add Question', and 'Edit Question'.

Sections will be displayed on the left of the screen, questions on the right.

2. Click **Add Section** on the left and specify the number and name of the new section, and specify any introductory text:

The screenshot shows a 'Section Details' dialog box with the following fields:

- Section No. (text input)
- Section (text input)
- Section Introduction (text area)

 At the bottom right, there are two buttons: a save icon and a back arrow icon.

3. Save the new section details. It is added to the list on the left.
4. Repeat steps 2 and 3 as necessary to add further sections.

2.1.3 Defining the questions

When you have defined the sections for the form template, you can define the questions for each section.



Refer to Section 2.1.2, Specifying the form sections, for details on how to add a new form.

1. On the appropriate Form Definition screen, click to select the section for which you are defining the questions.
2. Click **Add Question** to specify the details of the question:

3. Enter the following details:
 - the question number
 - the text of the question
 - if the question requires no answer, eg as for a point of information not requiring an answer, tick the **Read Only** box and enter any comments that you want displayed when the question is read in the **Comments** field. The **Comments** field is only displayed if the **Read Only** box is ticked
 - select the **Type** of the question, eg Choices, Dropdown, Text block or Date:
 - if Choices or Dropdown is selected, choose the **Options** that are to be available, eg Yes, No, N/A or Low, Medium, High
 - if Text block is selected, enter any comments that you want displayed
 - Date does not require any additional information.
4. If the question is to appear on the front page of the report, tick the **Show On Report Front Page** tickbox.
5. Save the question details. It is added to the list on the right.
6. Repeat steps 2-4 to add all the required questions.
7. Edit any existing questions by selecting the question and clicking on **Edit Question** (or double clicking on a question) until all questions are defined for the form.

Section No	Section	No.	Question	Type
1	Escape Routes	1	Are aisles and means of escape routes free from obstructions?	Choices [Yes,No,NA]
2	Flammable Substances	2	Are combustibles stored in escape routes?	Choices [Yes,No,NA]
3	Furnishings	3	Are exit routes lengthy or difficult?	Choices [Yes,No,NA]
4	Housekeeping	4	Is there a system in place to warn people in remote areas?	Choices [Yes,No,NA]
5	Arson	5	Are the floor surfaces on the escape route free from tripping and slipping hazards?	Choices [Yes,No,NA]
6	Smoking	6	Are there sufficient exits for the number of people likely to be on the premises?	Choices [Yes,No,NA]
7	Lighting and Emergency Lighting	7	Do all doors open in the direction of the escape route?	Choices [Yes,No,NA]
8	Heating	8	Are there any dead ends?	Choices [Yes,No,NA]
9	Electrical System	9	Is the means of escape route satisfactory?	Choices [Yes,No,NA]
10	Fire Signs	10	Are main doors fire rated (evidence required)?	Choices [Yes,No,NA]
12	Fire Fighting Equipment			
13	Risk Rating			

To use the form template that you have defined, you need to make it available to specific Project Types.



Refer to Section 2.3, Linking the templates to a project type, for details on making a form available for use.

2.2 Defining possible answers to questions

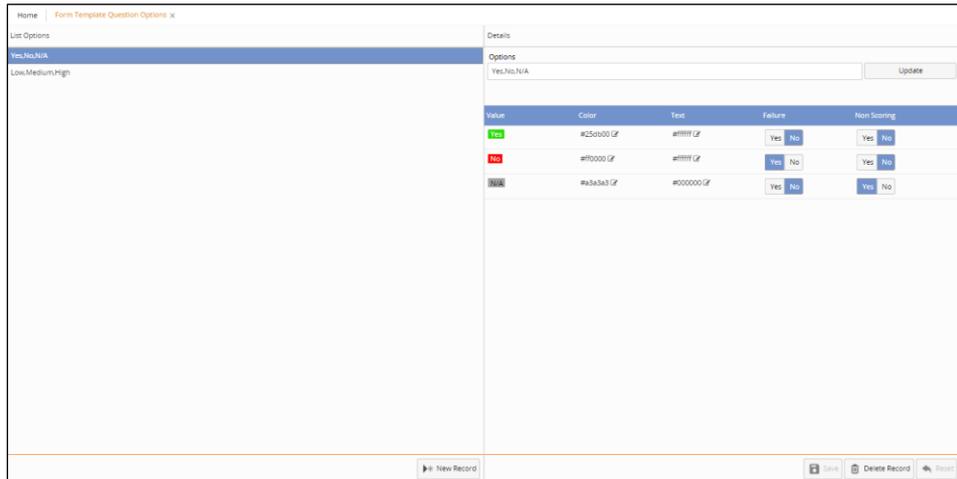
Depending on the questions you are asking, you may need to set up additional options for the answers. For example, if your question cannot be answered by Yes, No or NA but requires Black, Blue or Brown then you need to set up Black, Blue or Brown as a set of options.



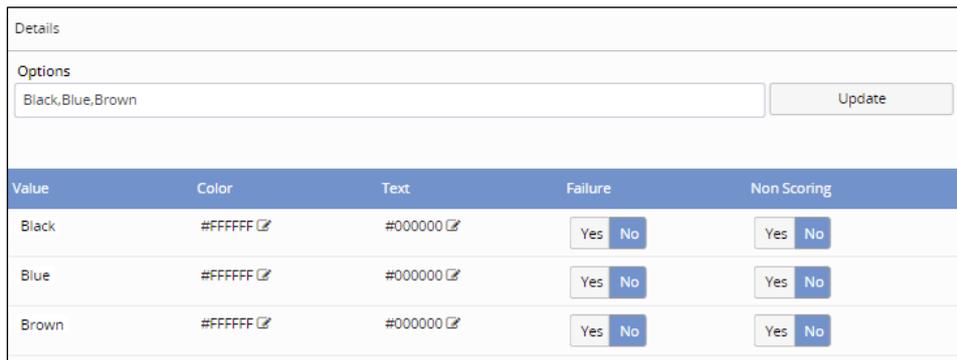
Note that you may need more than one set of the same options. For example one set of Yes, No, NA options can have No set as a failure and another can have Yes set as a failure.

To define a set of options:

1. Open the General submenu from the Setup menu and select "Form Template Question Options" to display the Form Template Question Options screen.



2. Click **New Record**.
3. In the **Options** field on the right, type the list of options that are to be in this set. Use commas to separate the options, without spaces, eg Excellent,Good,Poor.
4. Click **Update** to display the list of options where you can set the characteristics for each option.



5. Set the characteristics for each option:
 - **Colour** – click on the edit symbol next to the colour code to display the currently selected colour. To change it, click on the coloured bar to access a colour picker, set the colour, click off the colour picker, then click **Done**.



- **Text** – click on the edit symbol and set the colour of the text for this option.

- **Failure** – select Yes or No to indicate whether this option represents a failure. Failures will be displayed in red when filling in the form.
 - **Non Scoring** – select Yes if this answer is not to be scored, or No if the answer is to be scored. If an answer is scorable then it counts towards the score for the section.
6. Save the options.

2.3 Linking the templates to a project type

To use the form template that you have defined, you need to make it available to specific Project Types. When a project of that type is created, the form template becomes available. You can link multiple form templates to a project type which enables you to complete a range of forms for a project. For example, you might have a Health & Safety project type and link to this a number of form templates. Then when you are carrying out the job, you can choose which of the available form templates need to be completed in this particular case.

To link a form template to a project type:

1. Open the General submenu from the Setup menu and select “Project Types” to display the list of project types set up in your Alpha Tracker.
2. Search for the required project type and click its row expander:



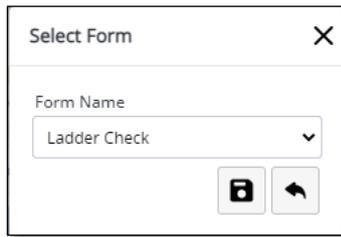
A set of tabs is displayed. Click the **Forms** tab.

The screenshot shows the 'Project Types' page in Alpha Tracker. The 'Forms' tab is selected, and a modal window is open for the 'Survey' project type. The modal contains a table with the following data:

Form Name	Notes
Fire Risk Assessment	X

An 'Add Form' button is located at the bottom right of the modal.

3. Click the **Add Form** button and select a form template from the dropdown list to link it to the project type:



Select Form

Form Name

Ladder Check

Save Cancel

4. Save to add the form template to the list.
5. Repeat steps 3 and 4 to link all the required form templates to the project type.

3. COMPLETING FORMS

You can complete or review forms for a project from Alpha Tracker and this is described in this section. Typically, field staff will be using an app – Alpha Tracker Mobile – to complete forms onsite. The same features are available for forms in Alpha Tracker and Alpha Tracker Mobile. The mobile app works completely offline, whereas to enter information into Alpha Tracker you do, of course, need an internet connection.

When you book in a project, if form templates are linked to the chosen project type, they are available for you to complete.



*Note that for the project to be available under **Forms** on Alpha Tracker Mobile, you must create a diary appointment for the person and project.*

Once completed, you can output the form by generating a report if there is a template set up.

3.1 Booking in your project

To book in your project:

1. Create a new project in your usual way. This may, for example, be by using the New Project option on the Survey Quick Start or Projects menu, or from a quotation, client record or site record.
2. Ensure you select the correct project type on the new project.
3. Book the project into the diary for the person who is to complete the form(s). This makes the form(s) for the project available for completion.

Once the project has been created and booked into the diary, the forms linked to the project type are available for completion.

3.2 Completing the form (app)

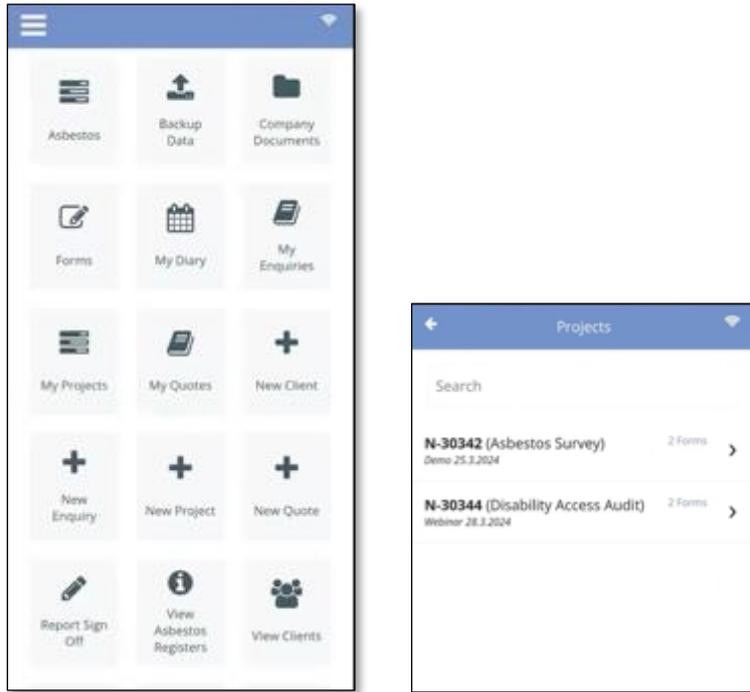
Once the project has been created and booked into the diary, the forms linked to the project type are available – they are only available in the Alpha Tracker Mobile app to the person for whom you have made the appointment.



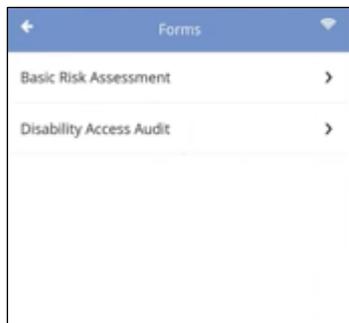
Forms can be completed offline in Alpha Tracker Mobile.

To complete them using the app:

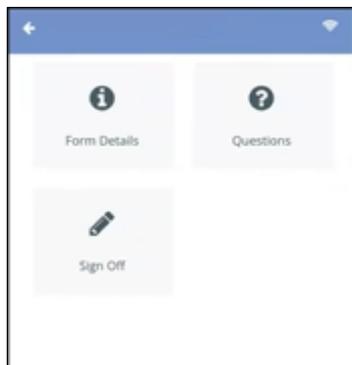
1. Open Alpha Tracker Mobile and select **Forms**. Any projects that you have booked in your diary are displayed.



- 2. Select the required project. The form(s) that have been linked to the project are displayed.



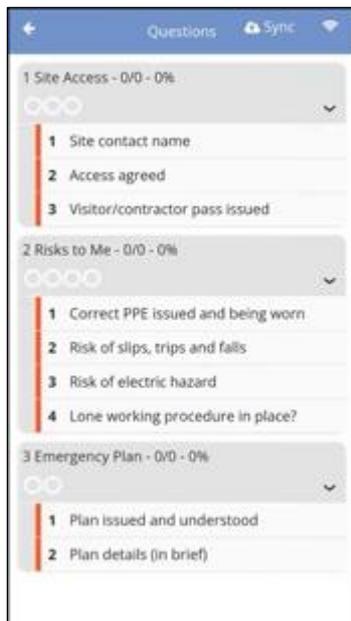
- 3. Select the required form. The three parts of the form are displayed. You would typically complete these in order, ie Form Details, then Questions, then Sign Off.



- 4. Tap **Form Details** and enter the setup details to indicate who is completing the form, when etc, and taking/attaching a photograph if appropriate (eg for a front page photo).



5. Save the **Form Details** and then go back to the previous screen.
6. Tap **Questions** to display the set of questions in the form, divided into sections.



7. Tap on the first question to display it and answer the question. This may involve entering text, reading text, or choosing an answer from a selection.

Answer Sync

Answers Actions Photos

S1/Q3 Visitor/contractor pass issued

Yes No

Standard Comments

Comments

For mapping purposes, a message may ask you to share your location. This is to stamp the answers with the current location. You should allow location sharing.

8. Tap the forwards arrow (**Next**) to save your answer and move on to answer the next question. Repeat as necessary. You don't have to complete the questions in order, but it is an easy way to complete each question.
9. If you need to record actions for yourself or other people, tap on the Action tab where you can enter unlimited actions.

Answer Sync

Answers **Actions** Photos

Action *

Priority *

Target Date *

Assigned To *

Status *

Completed Date

10. If you need to capture any photographs, tap on the Photos tab where you can enter unlimited photographs.
11. When you have finished all the questions, save and return to the list of questions. Completed questions have the text struck through. Circles indicate how the questions were answered. The circles above the questions are:
 - green if completed and passed
 - red if completed and failed

- grey/black if completed and neither pass nor fail
- empty if not yet completed.

The screenshot shows the 'Questions' screen with the following details:

- Section 1: Site Access - 2/2 - 100%** (Progress: 3 green dots)
 - 1 Site-contact name - [Update]
 - 2 Access-agreed - [Update]
 - 3 Visitor/contractor-pass-issued - [Update]
- Section 2: Risks to Me - 1/3 - 33%** (Progress: 1 red, 2 green dots)
 - 1 Correct-PPE-issued-and-being-worn - [Update]
 - 2 Risk-of-slips-trips-and-falls - [Update]
 - 3 Risk-of-electric-hazard - [Update]
 - 4 Lone-working-procedure-in-place - [Update]
- Section 3: Emergency Plan - 1/1 - 100%** (Progress: 1 green, 1 black dot)
 - 1 Plan-issued-and-understood - [Update]
 - 2 Plan-details-in-brief - [Update]

12. Save the **Questions** and then go back to the previous screen.
13. Tap **Sign Off** to display the screen where both you and the client can sign off the form.

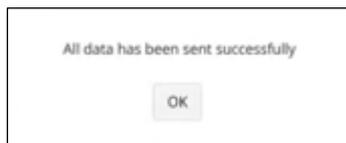
The screenshot shows the 'Sign Off' screen with the following details:

- Header: Sign Off [Sync]
- Section: Completion Signature
 - Buttons: Clear, Cancel, Accept
- Section: Client Signature
 - Buttons: Clear, Cancel, Accept
- Bottom Button: Generate Report

14. Return to the Forms list.
15. When you have a good connection, preferably WiFi, you can synchronise the data. Tap **Sync** at the top of the screen You must first confirm that you are not driving.



Files are backed up and then sent into the database.



3.3 Completing/review the form online (laptop)

The synchronized data is available to review in Alpha Tracker.

To complete or review a form online in Alpha Tracker you first need to find the project and then access the available forms by clicking the **Forms** button. The forms would typically be completed onsite using Alpha Tracker Mobile and then, once the data has been synchronized, reviewed online and a report generated.

1. On the Project List, click the **Forms** icon on the project for which you want to complete a form:



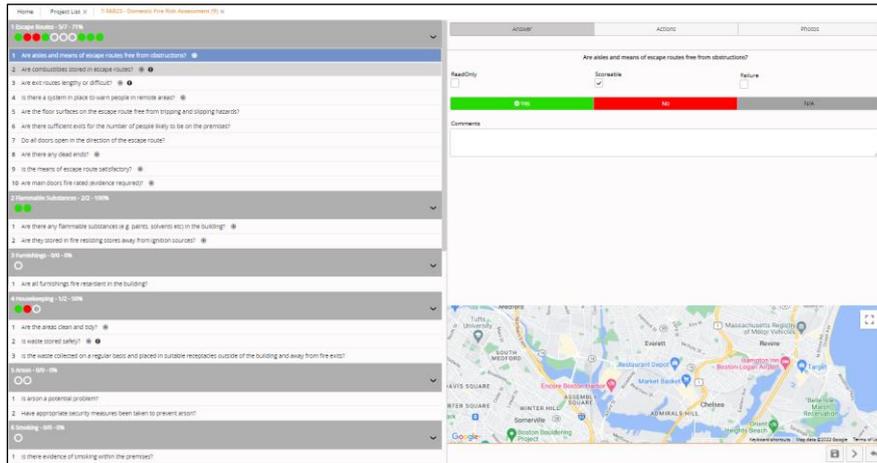
Alternatively, open the project and click on the **Forms** icon in the group of buttons in the bottom left of the screen.

One form record is displayed for each of the form templates linked to the project's project type.

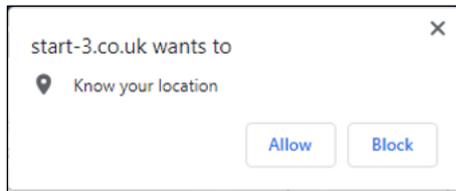
Form ID	Date Created	Date Completed	Completed By	Form Name
12	15/03/2022			Health & Safety Inspection
11	15/03/2022			Fire Risk Assessment
10	15/03/2022			Domestic Fire Risk Assessment

You can add further form records as necessary if you need multiples of any forms by using the **Add Form** button.

2. Click the **Questionnaire** button on the form that you want to review. The questions are displayed, with the first one selected.



For mapping purposes on this screen, a message similar to this one may ask you to share your location:



Click **Allow** to share your location. This message is only displayed once.

- Review/answer the question by using the options available to you on the right-hand side, eg Yes/No (or other option) buttons or a **Comments** text box.

If an option is coloured red, it is classed as a fail.

- If you want to add a photo to support the answer:
 - select the Photos section on the right
 - click **Add Photo**
 - type a caption to describe the photo in the Photo Caption box
 - click **Save**, then click **Replace Photo** and browse to and select the photo
 - you return to the Photos screen with the photo(s) displayed
 - repeat as necessary.

If required, edit a photo by double clicking it in the Photos section, then editing the caption or deleting and selecting a new photo.

- If you want to add an action to an answer:
 - select the Actions section
 - click **Add Action**
 - enter the details of the action
 - select the priority (High, Medium or Low)
 - click and select a target date using the date picker
 - assign the action to someone
 - describe the status of the action

- if the action has already been completed, click and select a completed date using the date picker
 - click **Save**
 - repeat as necessary.
6. Click on the next question or the right arrow button in the bottom right.



Progress through the questions in the section is indicated by circles at the top of the screen, above the question. The circles are:

- green if completed and passed
- red if completed and failed
- grey/black if completed and neither pass nor fail
- empty if not yet completed.

Answers are automatically saved as you move through the list of questions.

The numbers after the section name indicate the score. First, the number of scorable questions that have a correct/pass answer is displayed, eg 1/2 indicates that two of the questions in the section count towards the score, but only one has a correct/pass answer. Then, this is expressed as a percentage, eg 1/2 – 50%.

7. When you have finished reviewing/answering the questions, close the screen and return to the Project List or Project Details screen. You can now complete or review the Form Details.

3.4 Completing/reviewing the Form Details (laptop)

The Form Details consist of general form information such as who completed it and when, their signature and also the client's signature, and the front-page photo. This is usually completed on the Alpha Tracker Mobile app and reviewed on the laptop.

To complete or review the Form Details online:

1. Click the **Forms** icon on either the Project List or the Project Details screen.
2. Select the form record required and click its **Form Details** button to display a screen.

The screen displays details of its creation on the left.

3. Add completion details by filling in the **Completed By**, **Date Completed** and **Comments** fields.
4. Add signatures by signing in the box, then clicking **Accept**, (or **Clear** to re-do the signature.)
5. Upload a front-page photo for the report by clicking the **Upload** button, selecting the required file and clicking **Upload**.
6. Save your changes. You can now generate the report.

3.5 Generating the report

When you have finished answering the form questions and checked the form details you can generate the report if a template has been set up.

1. On the Project List or Project Details screen, click the **Forms** icon on the project for which you want to generate a report.

Form ID	Date Created	Date Completed	Completed By	Form Name	
12	15/03/2022			Health & Safety Inspection	Form Details Questionnaire
11	15/03/2022			Fire Risk Assessment	Form Details Questionnaire
10	15/03/2022			Domestic Fire Risk Assessment	Form Details Questionnaire

2. Click the **Word/Excel** button on the form you have completed.
3. Select the template, choose whether to generate the document to screen or for it to be emailed to you, then click **Create Document**.

The report is generated. If it is displayed on screen, you can page through it, download it or print it directly by using the controls at the top of the screen. The generated report (Word and PDF) is saved in the project folder.