



Dashboard User Guide

July 2022
Version 1.0

The XForms Dashboard offers a simple, aggregated view of all your submitted forms. You can filter by application and immediately see visual and numerical data on the forms for that project.

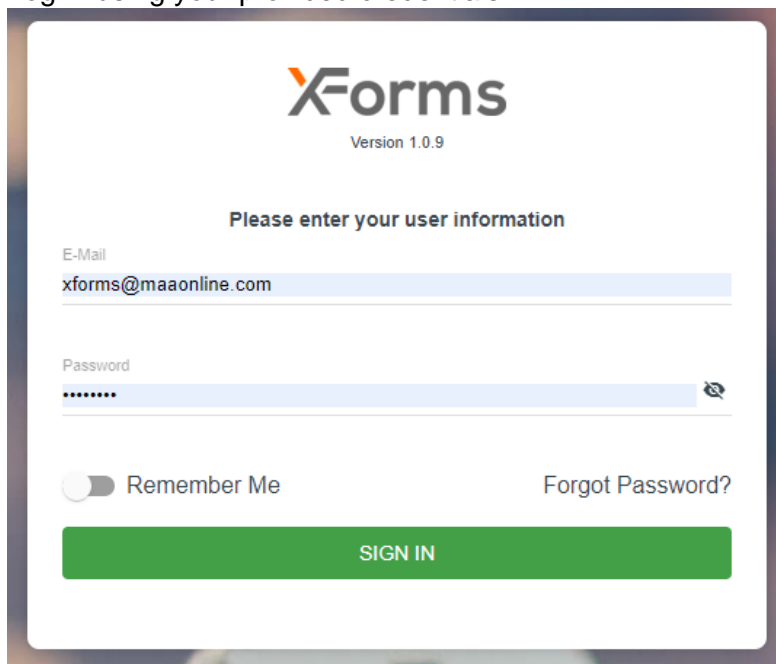
Tips and Best Practices

- Use the latest versions of Chrome, Safari, or MS Edge. Firefox also works but may have some issues. The XForms Dashboard does **NOT** work on Internet Explorer.
- If you encounter issues, try doing a browser hard refresh by holding down the CTRL key (Windows) or Shift key (Mac) and clicking on the refresh icon. You can also try running it in an incognito/private browser window, which will ignore saved cookies.
- If the PDF on the PDF screen looks wrong, click on the refresh icon to re-generate a new version.
- If you want to change your password, click on the person silhouette at the top right of the screen (not on your user record in Admin > Users)
- If you want to save an image from a form, go to the Forms screen, click on the eyeball icon (the HTML viewer), scroll to the photo you want to save, right-click on it, and click on the Save Image As... menu option

Logging In

Go to dashboard.xformswb.com/login

Log in using your provided credentials.



XForms
Version 1.0.9

Please enter your user information

E-Mail
xforms@maaonline.com

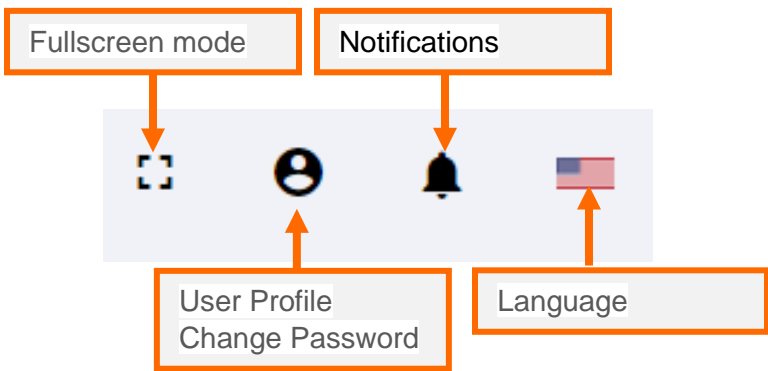
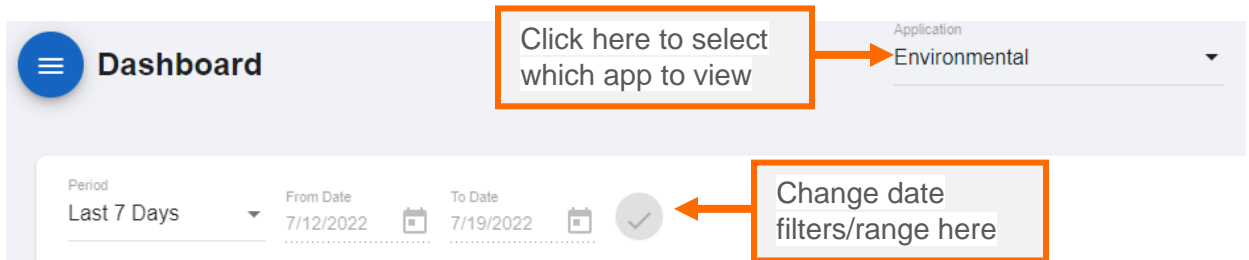
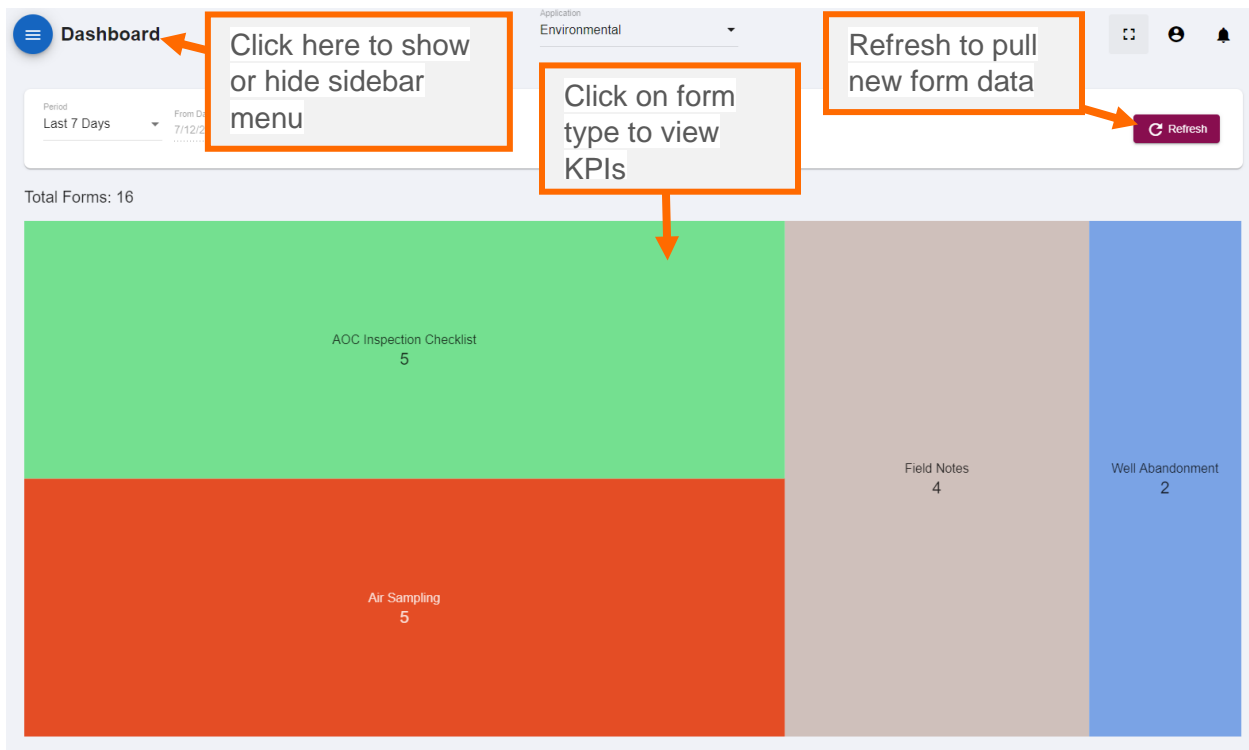
Password
.....

Remember Me [Forgot Password?](#)

SIGN IN

Dashboard Screen Controls

Your main dashboard may look something like this:



View Data by Form Type

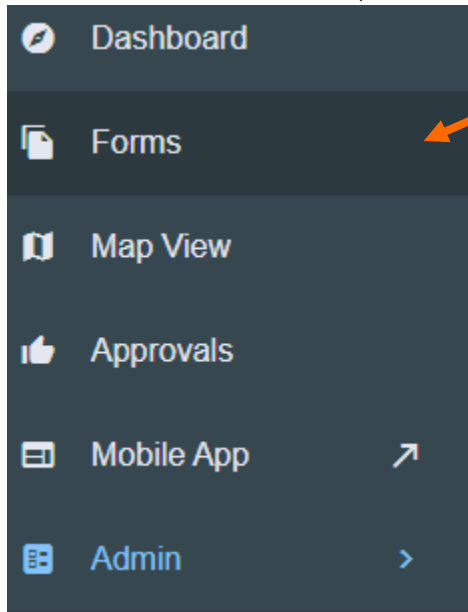
Click on a form type block on the main screen to view aggregations and key performance indicators (KPIs) at the form template type level.

The screenshot shows a dashboard for the form 'AOC Inspection Checklist (114)'. It features three KPI cards: 'Clients' with a value of 1, 'Projects' with a value of 1, and 'Users' with a value of 3. An arrow points from a callout box 'Click here to return to main Dashboard' to the top-left navigation arrow. Another callout box 'KPIs for the form template selected' points to the three KPI cards. A third callout box 'Aggregated view of KPI box selected' points to a detailed view of the 'Users' KPI, which includes a pie chart and a table.

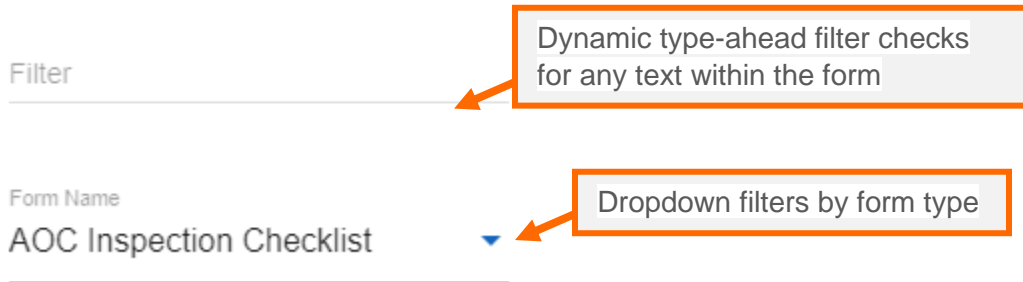
Users	
Gary Fischer	2
Nolen Barefoot	100
Ruth Tull	12

Form Screen Controls

To access submitted forms, click on Forms in the sidebar menu.



Use the type-ahead filter or Form Name dropdown to find the forms you are looking for.



Use the toggle buttons to show draft and/or deleted forms.



Export data values displayed in grid

Export all form data

Export to Excel

Refresh

Period
Year to Date







From Date
1/1/2022

To Date
7/19/2022

Use date filters to further narrow results

View specific form data by using the links attached to each form.

Date ↓	PM/Field Tech	Client	Project	Planned Activities
7/19/22, 2:56 PM	Gary Fischer	Grubb Ventures	Peden Steel	A continuation of the activities that were in progress yesterday

-  View a gallery of all images submitted for the form
-  Attach a document to the submitted form
-  Delete form
-  View form HTML
-  View form PDF
-  View form history

PDF Controls

The screenshot shows a PDF viewer interface for a document titled "AOC Inspection Checklist" from "Mid Atlantic". The interface includes a left sidebar with a navigation menu, a central content area, and a right sidebar with a tool palette. Several controls are highlighted with orange callout boxes:

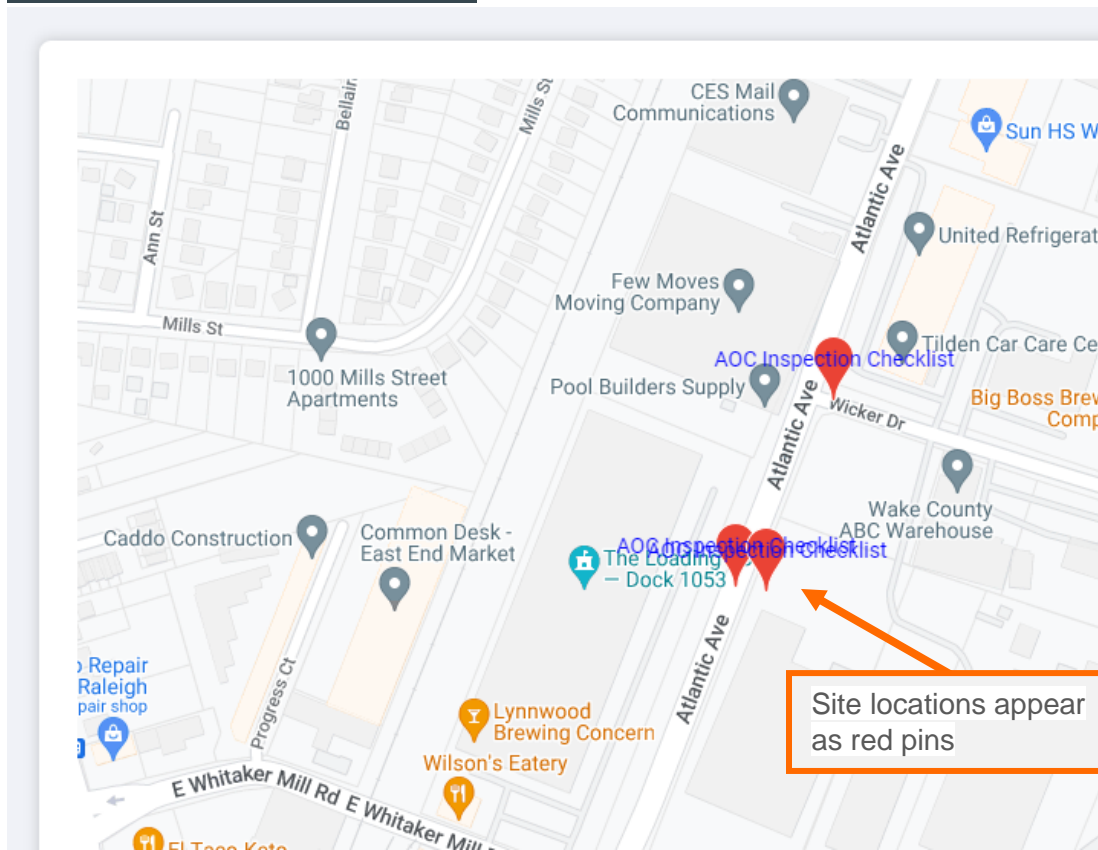
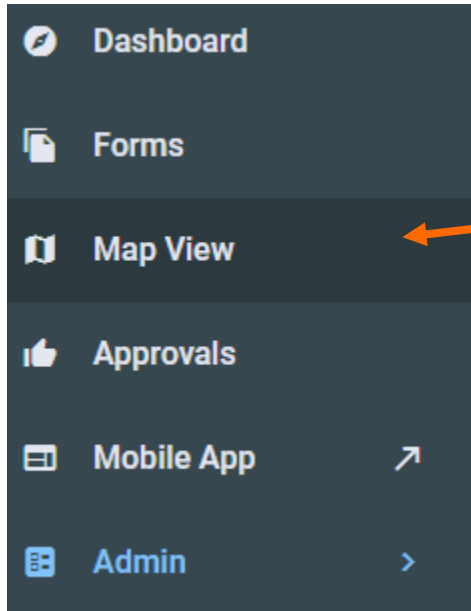
- Refresh**: A button in the top left corner with a circular arrow icon, labeled "Click to re-generate new PDF".
- Zoom controls**: A set of controls in the top center, including a minus sign, a plus sign, and the text "Automatic Zoom", labeled "Zoom controls".
- Fullscreen**: A button in the top right corner with a full-screen icon, labeled "Fullscreen".
- Print**: A button in the top right corner with a printer icon, labeled "Print".
- Download**: A button in the top right corner with a download icon, labeled "Download".
- Section/header navigation**: A callout box pointing to the left sidebar menu, which contains the following items: "AOC Inspection Checklist", "Project Info", "Checklist", "Photos/Notes", "Sign-Off", and "<- End of Form ->".

The central content area displays the following information:

- Project Info**:
 - Field Tech : Gary Fischer
 - Date : 07/19/2022
 - Client : Grubb Ventures
 - Project : Peden Steel
- Checklist**:
 - Yesterday's Accomplishments : Pressure washing of the concrete outside of DG. Metal window treatment being installed on the outside on Bowtruss. Continued interior at MF . Decorative wooden floor being installed outside of DG
 - Today's Planned Activities : A continuation of the activities that were in progress yesterday

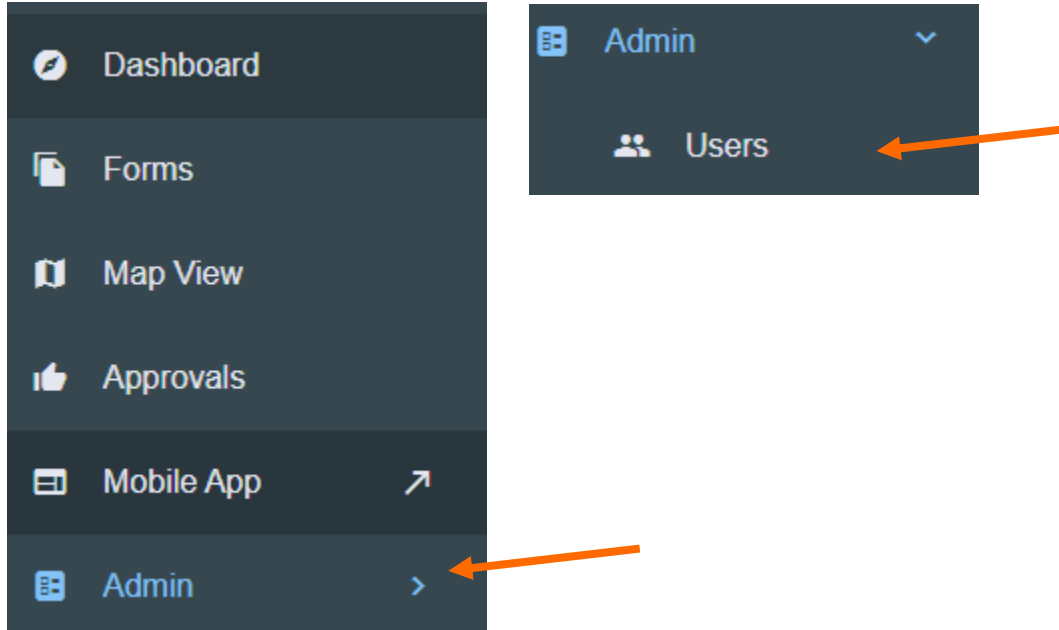
Map View

The map view displays the form types at the geolocation where they were initiated. This requires that the user allow XForms to capture their geolocation when prompted by their device.



User Screen

If you have admin privileges, you will be able to add users, disable users, set password policies, set user permissions levels, and force password resets. Access by expanding the Admin link in the sidebar menu and then clicking on Users.



Click on the green **Policies** button in the top left of the Users screen to set your password policies (password complexity, password expiration days):



Use the following buttons to set app access, edit user details, or reset password.



Set app access (client and user permissions only)



Edit user details or disable user



Reset password

User these buttons in the top right of the Users screen to add a new user or refresh the list of users:



When adding a new user, be sure to fill in all applicable details. Available roles include:

- Field User** View their forms only
- Manager** View everyone's forms
- Admin** Superuser
- Client** View their own forms (read only)

A screenshot of a 'User Info' form. The form has a light blue header. Below the header are several input fields: 'First Name', 'Last Name', 'Initials', 'Role' (a dropdown menu currently showing 'Field User'), 'Phone', 'Email', and 'Password'. Below the password field is a validation box with two red exclamation mark icons and the text 'contains at least one digit character' and 'contains at least 6 characters'. At the bottom of the form is a 'Disabled' toggle switch, which is currently turned off. Below the form are 'Cancel' and 'Save' buttons. Two orange callout boxes with arrows point to the 'Role' dropdown and the 'Disabled' toggle. The first callout box contains the text 'Set permission level here'. The second callout box contains the text 'Click here to disable a user'.