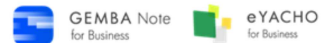


GEMBA Note for Business eYACHO for Business Forms Developer Guide



This guide explains how to create and use forms for GEMBA Note for Business and eYACHO for Business.

Unless indicated otherwise, this guide gives you instructions using screenshots with GEMBA Note for Business on an iPad (iOS9, portrait orientation).

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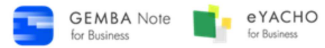
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About the diagrams in this guide

On the screen diagrams, the area to be manipulated is indicated by a  and a



Part 1: Outline



This guide explains summary of forms that can be made and used in GEMBA Note/eYACHO , and controls and units that are used when making forms.

What is a Form?

A form is a screen that allows you to create and enter data within a note.

- Repeatedly entering the same type of data
- Registering certain information among people
- Re-entering data recorded onsite in a business form.

↓ When using a form...

- Efficient and smooth data entry
- Prevent omissions and improve data visibility
- Make a business form onsite to eliminate the need for re-entry

How to use Forms

After you register a form as a template, it will be selected as a paper style when you add a page.

Where to Store a Template

When making it just for yourself → My Template

When making one to share with a team → Shared Template

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A template is a page that you can select and add to your note such as a day planner refill.

The following templates are already included, and can be selected from the list in the “Select Paper” screen.

- Basic Templates

General-purpose templates.

- GEMBA Templates (GEMBA Note)

Sample templates made with calendar, chart and form units.

- Business Templates (eYACHO)

Templates optimized for business.

Any form can be registered as a template. Depending on the destination, different people will be able to use the template.

- My Templates

Templates that can be used by the person who registers it.

- Shared Templates

that can be shared with a team.

If a template is registered by one team member, all the other team members will also be able to use it.

Any team member can delete or change the title of a shared template.

In cases when the same content is often entered, or the same thing is pasted repeatedly, a template that includes these entered or pasted items can be made in order to save time. Forms created can also be registered as templates, and can be used when editing notes.

Design and Layout of Forms

A form can be made by placing form controls and units on a base format. Confirm what needs to be done, then decide the followings:

- Method of creating format
- Form controls and units to be used
- Place and set form controls and units

Take a form, and... Place form controls and units.

The diagram illustrates the process of creating a form. It shows a blank form on the left and a detailed invoice form on the right. An arrow points from the blank form to the detailed form, indicating the process of taking a form and placing controls on it. The detailed form is titled '御見積書' (Invoice) and includes fields for '顧客名を入力' (Enter customer name), '合計金額' (Total amount), and a table with columns for '品名' (Item name), '数量' (Quantity), '単価' (Unit price), and '金額' (Amount). The table has several rows for data entry. Below the table, there are fields for '小計' (Subtotal), '消費税' (Consumption tax), and '合計' (Total). The form also includes a date field for '見積日' (Invoice date) and '有効期限' (Validity period).

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How to make a format

Method 1: Use pre-existing data

Load a PDF page as a background and make the form.

If the pre-existing form image can be used, it can be made using this method.

If there is data in Excel or Word, first convert to PDF then load to use it as a format.

Method 2: Use the note editing function.

Paste diagrams and photos, enter text, etc. to make a format on a page.

Using form controls and units

In addition to ordinary note editing functions, there are also special form controls that can be used.

→ P.7 ~ Form controls and units for creating forms

Placement and settings of form controls

Form controls can all be placed and set in the following ways:

- Display and appearance of form controls and data
- Method of entering data
- Display when data hasn't been entered

Controls and units for creating forms (1)



* In addition to the above, there's also a date display field available as a form control.

Control/Unit	Explanation	Example																
Checkbox	Check/Uncheck the box.	<input checked="" type="checkbox"/> No. エリア																
Number Input Field	Enter a number in the following ways. • Use the Numeric Keypad • Choose from options	予定総人数 0 名																
Text Input Field	Enter texts in the following ways. • Use the keyboard • Choose from options	顧客名を入力 御中 製品名 タップしてカテゴリを選択 GEMBA Note GEMBA Note for Business																
TextArea Field	Enter text using the keyboard .	いつもありがとうございます。 ご不明な点はいつでもお問い合わせください。																
Selection Field	Choose more than one from options.	<input type="radio"/> 感想 <input type="radio"/> 不具合 <input checked="" type="radio"/> 要望 <input checked="" type="checkbox"/> インターネット <input checked="" type="checkbox"/> 新聞 <input type="checkbox"/> 雑誌																
DateTime Input Field	Enter date and time.	提出日: 2016年2月26日																
Date Display Field	Display date based on the current daily page automatically. You can not enter.	2016/03/11																
Image Field	Select more than one photos and display them.																	
Phone Number Field	Enter a phone number.	電話番号: 03-XXXX-XXXX																
Spreadsheet	Enter data in a cell. You can enter a number value, text and formula and refer to the value of the other cells and calculate.	<table border="1"> <thead> <tr> <th>品名</th> <th>数量</th> <th>単価</th> <th>金額</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>	品名	数量	単価	金額												
品名	数量	単価	金額															

Form controls and units for creating forms (2)

Enter a number

Choose from options

Points on how to decide which to use

Form controls are chosen based on the anticipated action or data to be entered.

* Settings can be changed by selecting "XX setting" from the menu displayed when the form control is selected.

→ P.16 Displaying and entering form controls.

Enter a number

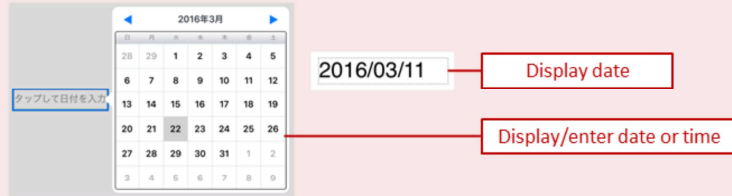
Value		Control	How to Set/Explanation
Number		Number Input Field	Choose "Numeric Keypad" as the input method. <ul style="list-style-type: none"> The maximum and minimum values can be set. Display format of a number value can be specified. e.g.: Thousands separator, Prefix/Suffix
Phone Number		Phone Number Field	<ul style="list-style-type: none"> Input method can be selected. in the View Mode, you can call the phone number that is entered.
Other than a number or a phone number	One line	Text Input Field	Choose "Keyboard and List" as the input method. The maximum number of characters can be set.
	Multiple Lines	TextArea Field	<ul style="list-style-type: none"> Format can be set as same as Text Unit Style settings.

Choose from Options

The number of values can be selected	Control	How to Set/Explanation
Choose one (Number value)	Number Input Field	Choose "List" as the input method then set options.
Choose one (Other than a number)	Text Input Field	Choose "List" as the input method then set options.
	Selection Field	Set options and choose "Radio Button" as the selection method. It is suitable to clarify options.
Choose one/Enter text	Text Input Field	Choose "Keyboard and List" as the Input method then set options.
Choose more than one	Selection Field	Set options and choose "Checkbox" as the selection method.

Controls and units for creating forms (3)

Display/Enter dates and times



Switch on/off



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Display/Enter dates and times

Value/Action	Control	How to Set/Explanation
Display Date	Date Display Field	Date to be displayed can be set on the basis of the Daily Page's date. It is used on Daily Pages.
Display DateTime	DateTime Input Field	Depending on what you want to display and input, choose the "Display Format" from the options, "Date Only", "Time Only" or "Date and Time". <ul style="list-style-type: none"> Input method can be selected for "Date Only". Unit of minutes can be set. Initial date to be displayed can be preset.

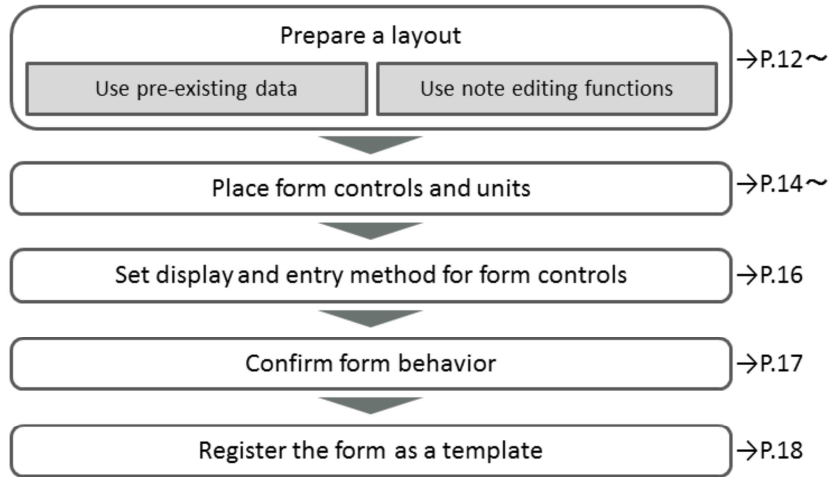
Switch on/off

Item	Control	How to Set/Explanation
Single item	Checkbox	Labels can be set.
Multiple items made into a group	Selection Field	Set options then choose "Checkbox" as the selection method.

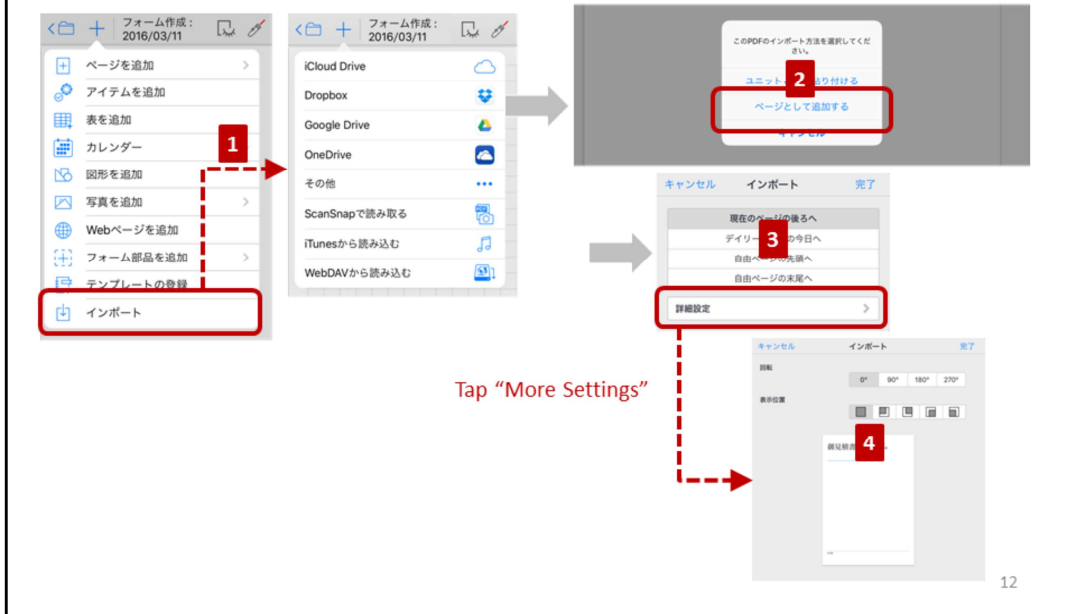
Part 2: Creating Forms

Instructions for creating and registering forms.

Form Creation Flow



Prepare a layout (1) Using pre-existing data



Load a PDF for the page background, and use it as a format.

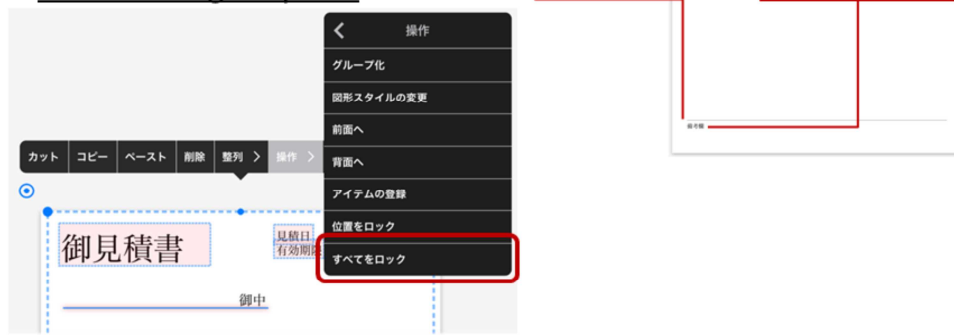
For details about the import functions, tap > "Manual" to see the manual

- To load a PDF: Open a note, tap > "import" and load a PDF.
A PDF can also be sent to GEMBA Note / eYACHO from a mail app or other apps.
e.g.: Open from Dropbox
 > "Import" > tap "Dropbox", and select the PDF
Select a PDF from the Dropbox app, and push the "send" icon and select "open in another app" > "Copy to GEMBA Note" or "Copy to eYACHO"
- When the prompt appears to select an import method, choose "Add As Page(s)"
- Select the import destination then tap "Done" or "More Settings"
- Tap the "More Settings" to change the orientation of the PDF or create some white space.
- Select the rotation angle or display location, then tap "Done".

Prepare a layout (2) – Using note editing functions

Step 1. Place headings, frames, and dividing lines

Step 2. Lock the lines, frames, and headings in place



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Prepare a layout by adding headings, form frames, and dividing lines to a page.

- Tap > "Manual" to learn more about note editing functions in the manual.

Step 1. Place headings, frames, and separator lines

Add frames and separator lines

Choose squares and straight lines from > "Add Shape" menu, and place on the page.

Add a heading

Tap to activate the text mode, and tap a location for the heading, then enter text.

Arrange placement of graphics and text

When dragging shapes and text, snap lines appear to assist in aligning elements.

Also select and display shapes and text with Lasso mode.

Choose the placement method from the Align menu to align items at regular intervals, center items, and more.



Step 2. Lock the lines, frames, and headings in place

Once the layout formatting is complete, it's recommended to lock the shapes and text in place.

Once locked, the formatting can't be accidentally edited when using registered forms or placing form items.

To lock the formatting, use the lasso tool to select shapes and text, and tap "More" > "Lock all" from the menu that appears.

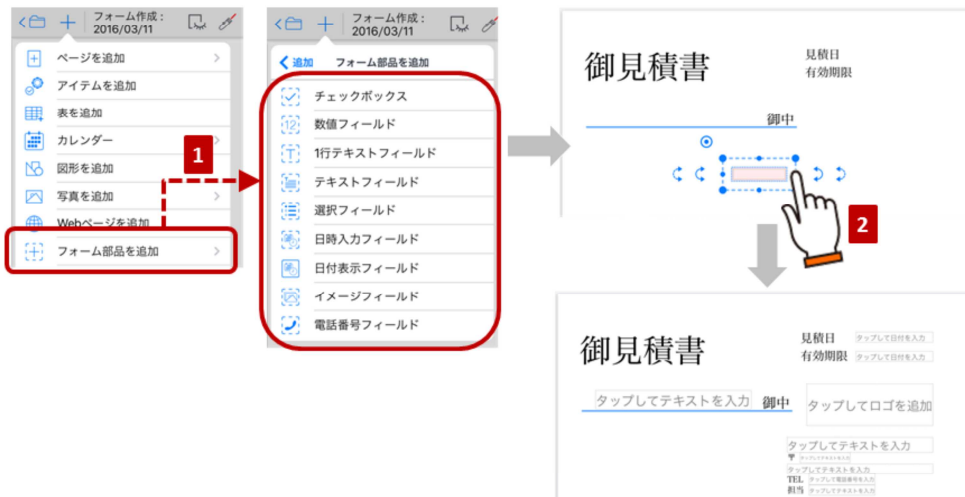
Tips: To edit or delete locked shapes and text, you need to unlock them.

Select a shape or text that is locked their positions, then tap "More"> "Unlock All" from the menu that appears.

* Text or photos locked by "Lock All" can not be selected with the lasso tool. Press and hold to select each item .

Place form controls and units (1)

Place form controls



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Place form controls and/or graphs on top of the prepared layout.

Place form controls

1. Using the note editing screen, tap **+** > "Add Form Control", then select a form control.
2. The selected form control can be placed.
3. Drag the form control, changing the size and moving them around.
The form control can be moved and resized just like graphics and photos.

Place form controls and units (2)

Place a spreadsheet

Change the number of rows and columns, or adjust the size

Enter headings, set math formulas

Place a spreadsheet

Use the note editing screen tap > "Add Spreadsheet" and a spreadsheet appears with cells selected.

Change the number of rows and columns, adjust the size, and place it on the layout.

Double tap a cell to enter a heading or set a math formula.

- * Tap > "Manual" to see the manual to find out how to manipulate spreadsheets and what sort of formulas can be used in a spreadsheet
- * In order to make a spreadsheet like the one shown here, tap > "Add Shape" and add a square, then hide the parts that are not needed. Shapes like this can be locked after the position of the spreadsheet is decided, so that it can't be selected or moved.

合計金額	Square (white border line and filled with white)		
品名	数量	単価	金額
小計			
お値引			
税引前合計			
消費税			
合計			

Small squares are placed over the '合計金額' cell and the '小計'/'お値引'/'税引前合計'/'消費税'/'合計' row.

Select a shape, then tap "More"> "Lock All" from the menu that appears.

Set display and entry method for form controls

1

2

3


Display and appearance of form controls and data

Method of entering data

Display when data has not been entered

Initial values for the form

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1. Tap  and select the Lasso mode.
2. Either drag the lasso to select the form controls, or hold down on to select them, and tap the settings from the menu.
3. After the form control setting is complete, tap "done".

The following settings can be done for each form control (except Date Display Field,)

Display and appearance of form controls and data

Change these with "Field Settings" and "Display Settings"

e.g.: To align the appearance of form controls

"Field Settings" or "Display settings" > "Text style" to match the format of other form controls or the prepared format in grid lines, font, size, color, etc.

* Text fields can have the frame format, color, and text settings changed..

How to enter data

Number Input Field, Text Input Field, Selection Field, DateTime Input Field, Phone Number Field, and Image Field can have the data entry method set in "Edit Settings". Set the maximum length of text and maximum number of images here.

Display when data has not been entered

Set a "Place Holder" in "Edit Settings" for when data has not yet been entered into fields such as the : Number Input Field, Text Input Field, TextArea Field, DateTime Input Field, and Image Field.

e.g. : in the case of an image field

"Tap to insert an image" (initial setting) → "Tap here to add a logo"

* For text fields, the placeholder text appears at the bottom of the frame

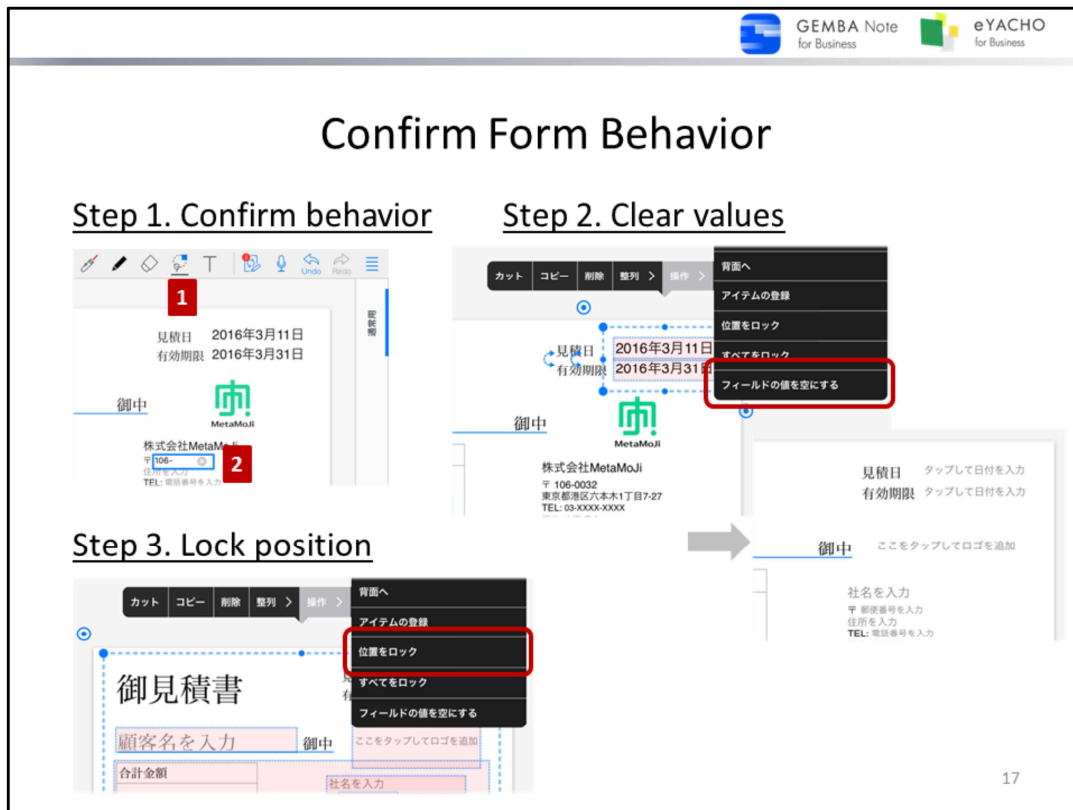
Initial values when using forms

For the DateTime Input Field, the date and time set in the "Item/Template Settings" will appear as the initial value.

E.g.: Setting an "estimated date" or a "expiration date"


For either, select "Connect to Date".

For "estimated date" select "Added Date", for "expiration date" select "30 days after".



Once the form controls and units have been placed, confirm that they behave as expected.

Step 1. Confirm behavior

1. Tap  to switch to the Lasso mode.
2. Tap the form controls and units, and enter data to confirm that it can be entered and displayed as expected.

If it doesn't behave as expected, adjust the placement and settings.

- P.14~ Place form controls and units
- P.16 Set display and entry method for form controls

Step 2. Clear values

When the behavior is confirmed, clear the data entered in Step 1.

Use the Lasso mode to select form controls, then select "More" from the menu that appears, and tap "Clear Field Value". When using a unit such as a spreadsheet, delete the data that was entered into the unit.

Step 3. Lock position

Once the data is cleared, it is recommended to lock the position of the form controls and units.

If the positions are locked, there is no risk of accidentally moving things around when using the form.

In order to lock the position, use the Lasso mode to select form controls and units, and select "More" from the menu, then tap "Lock Position".

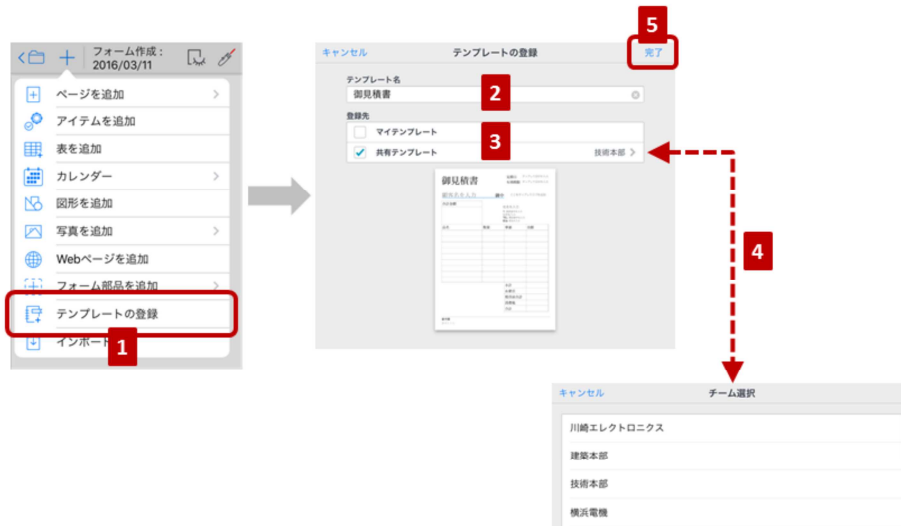
Notice: Use not "Lock All" but "Lock Position"

"Lock All" prohibits entering data or modifying settings.

Tips: To move or resize figures and texts which are locked their positions, you need to unlock them.

Select figures or texts which are locked their positions, then tap "More"> "Unlock All" from the menu that appears.

Register a form as a template



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Register a template for personal use as “My Templates”, and register one for team use as “Shared Templates”.

1. Display the page of the form, tap **+** > “Register template”.
2. Enter a name for the template.
3. Turn on either “My Templates” or “Shared Templates”
4. If “Shared Templates” is turned on in step 3, next select a team to share it with.
5. Tap “Done”.

The registered template will be added to either “My Templates” or “Shared Templates” in the template list. Templates registered as shared templates will be added to the template list of other team members.

Tips: Shared destination of Shared Templates

Select a team drive as the shared destination of a shared template. Each team drive can be specified visible or invisible from **≡** > “Team Drive Display Settings” on the Note List screen. Invisible team drive can not be selected as a shared destination.

Part 3: Using and Changing Forms



GEMBA Note
for Business



eYACHO
for Business

An explanation of how to use forms that are registered as templates, and how to alter and delete them afterwards.

GEMBA Note for Business eYACHO for Business

Using registered forms

Tap and hold a thumbnail to see the date the template was registered, registered users, and who it is shared with

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Forms registered as templates can be used when adding a page.

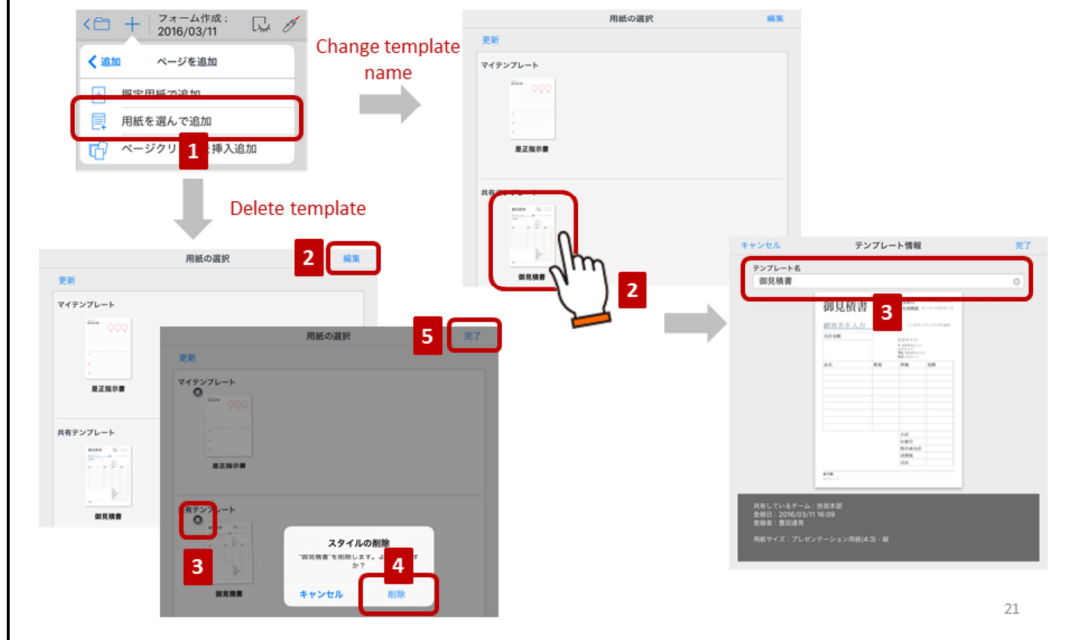
1. Tap **+** > “Add Page” then “Add using Paper Style” from the Note editing screen.
2. Select a template from templates registered in either “My Templates” or “Shared Templates”
The selected template will be added to the page.
3. Use the Lasso mode to select form controls and units and enter data.

Tips: Display of Shared Templates

- Shared templates of your teams are shown in the shared templates list.
Each team drive can be specified visible or invisible from **☰** > “Team Drive Display Settings” on the Note List screen. Shared templates saved in the invisible team drive are not displayed on the Note List screen.
- Tap “Update” to update the template list.



Changing and deleting registered forms



After registering the form as a template, the template name and form can be changed, or the template can also be deleted.

If a shared template is changed, contact team members as necessary and tell them to tap "Update" in the template list.

When a template is set in > "System Settings" > "Default Paper Settings" and it is deleted, it will go back to default settings and an alert will prompt the user to set a new template.

Change the name of a template

1. Tap > "Add Page" > "Add using Paper Style" in the note editing screen.
2. Tap and hold the template thumbnail.
3. Change the name of the template, then tap "Done".

Change or delete a template

To change something other than the name of the template, it is necessary to delete the registered template and re-register it after the changes are made.

Step 1. Delete template

1. Tap > "Add page" > "Add using Paper Style" in the note editing screen.
2. Tap "Edit" in the upper right
The template list will be able to be edited.
3. Tap the X icon to delete a template.
4. A confirmation message will appear, so tap "Delete".
5. After it is deleted, tap "Done".

Step 2. Register a new template

Register the updated form as a new template.

→ P.18 Register a form as a template.