



Form Creation Manual


For Android ver users

- You cannot see  and + > "Add Form components" in the note editing section on Android ver. Please use iOS/Windows ver for adding and setting Form components
- You can select/edit/approve the form components in Android ver which are customized in iOS/Windows ver

Detailed description

- This document describes the GEMBA Note for Business for iPad ver(iOS 15, horizontal) so some functions may be different from your GEMBA Note for Business.
- This document mentions the basic functions only. You can check either the User Manual or Administration Manual for further detailed descriptions. Please follow the directions below on how to refer to the User Manual and Administration Manual.

User manual: Click on the  icon on the top right of the screen in GEMBA Note for Business > User Manual

Administration manual: Click on the  icon on the right top on the screen in GEMBA Note for Business > Open Administrator Tool > Menu > Download/Link

- The figures in this document were taken with  on the top right of the screen in GEMBA Note for Business > System Settings > Display Settings > Display Labels on Buttons- OFF
- Please note that your notes might be difficult to read as the font styles will change if you open your document in different OS environments. Please use Source Han Serif/Source Han Sans fonts to solve this issue.

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1. Introduction

1-1 What Is a Form?

As an administrator, you can create and prepare forms for users to avoid filling out or pasting the same contents repeatedly

Forms can improve your work productivity and is a time & effort-saving tool. You only need to do simple operations to get clear documents at your construction site. Thus, there is no need to go back to your office and create documents on a desktop

The diagram illustrates a 'Problem management table' form with various input fields and annotations. The form is titled 'Problem management table' and contains the following fields and components:

- Barcode field:** A field for reading a barcode, labeled 'Reading a barcode'.
- Approval field:** A field for approval, labeled 'Approval' and 'TBC', with a 'Tap to Approve' button.
- Numbering field:** A field for numbering, labeled 'Quantity'.
- Selection field:** A field for selection, labeled 'Problem' with radio buttons for 'Construction A' and 'Construction B'.
- Image field:** A field for image input, labeled 'Enter image here'.
- Button field:** A 'Send E-mail' button.
- Input Texts:** A section containing 'Single-line Text' and 'Multi-lines Text' fields.
- Other fields:** 'No.' (A2018032200), 'Date' (2024/01/01), 'Member' (John Doe), 'Inspection type' (Machining), 'Inspection time' (1:20 PM), and 'Lot no.' (4901567014010).

Annotations include 'Show automatically' for the 'Date & Time Input' field, 'Select with a tap' for the 'Approval field', and 'Enter image here' for the 'Image field'. A red handwritten note 'Q crack' is visible on the image field.

As an administrator, you only need to select and place form components to get a form (no need to program with codes)

You just need to edit a little bit if forms need to be modified for different construction cases. This function can thus save the administrator's time

1-2 How to Make Forms

First of all, you can plan the layout of your finalized form and prepare the basic format while taking certain things into account, such as what kind of form components or tables will need to be added to units

Step1 Preparing the Format

Quotation

Date: _____
Expiry Date: _____

ABC Inc.

Remarks _____

Method 1: Load a PDF file in GEMBA Note
Load and use a format saved as a PDF file that you created in other apps to GEMBA Note → P.5

Method 2: Create the format itself in GEMBA Note
Insert shapes/photos/texts to create a format in a new page of GEMBA Note → P.6

Step2 Change Settings with Placing Form Components/Tables

Quotation

Date: Enter date here
Expiry Date: Enter date here

Enter text here Inc.

MetaMoji

Enter text here
TEL: Enter text here
Mr/Ms. Enter text here

Product Name	Quantity	Unit Price	Amount

Price
Discount
ex Tax
In Tax
Total

Remarks
Enter text here

Form components

Spreadsheet(units)

► Placing form elements/units (P7)

► Customize form components (P14)

Step3 Saving forms as a template

Forms that were created can be used as templates and shared with team members

► How to save the form as a template and use

How to use a form

When you add a page, select the form that is saved as a template

► How to use a template (P12)

2. Preparing a Format

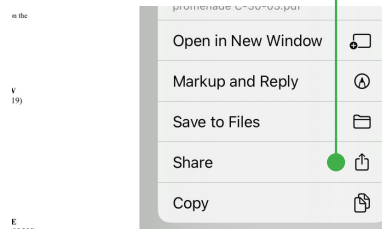
Method1 : Load a PDF file in GEMBA Note

① Open a PDF file in other apps

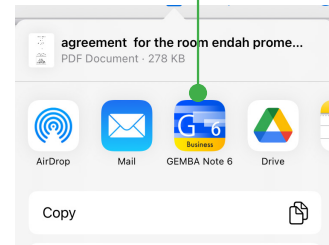
This example is explained with Mail app.

④ Please open a note in GEMBA Note in advance if you want to add a PDF to it.

② Tap and hold the PDF and select "Share".



③ Tap "GEMBA Note 6"

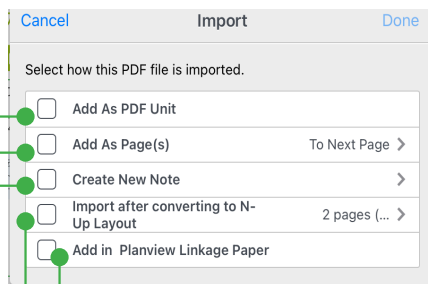


④ In case you use other apps, Please proceed to ④ after sending a PDF to GEMBA Note

④ Select how to import and tap "OK".

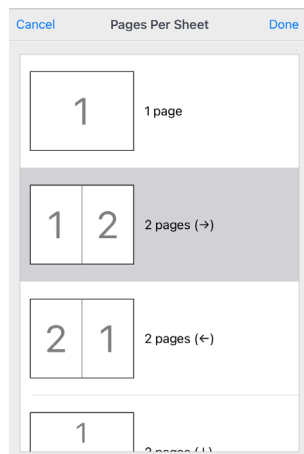
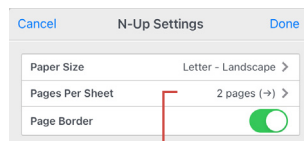
Add to the note that was opened as a new unit

Add to a Note as a new page

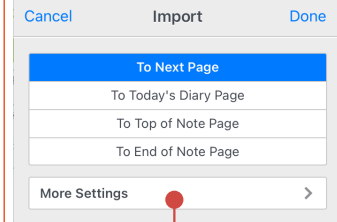


Please check on "[Appendices of Manual for Beginners: Put a pin mark on a blueprint and link to a construction photo \(reported area\)](#)". (eYACHO)

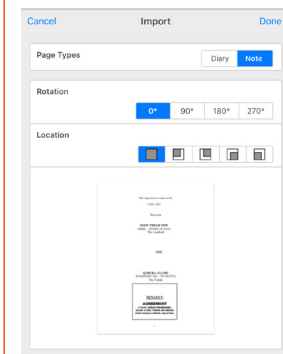
Convert multiple pages as one page.



Select the page to add a location

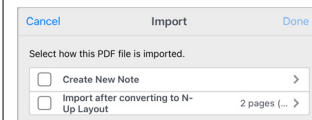


Select "Rotate" and "Location on a page"



If You Select Note Overall Screen

The screen below will be shown



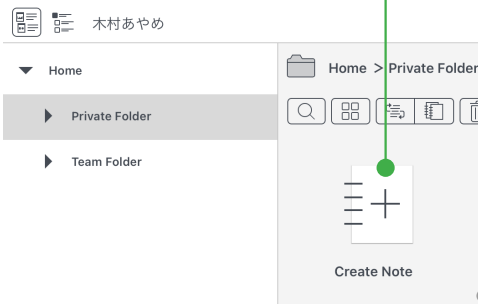
How to Import From Other Storages

Select + > import > select a PDF from a storage

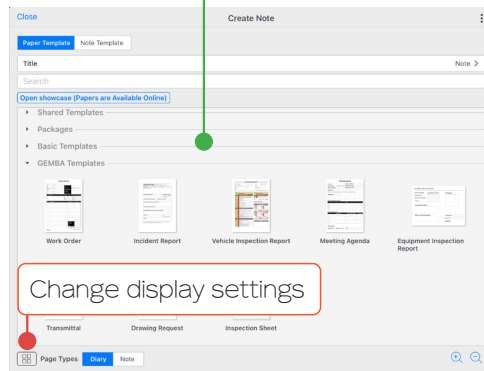
④ Select + > "Load from files" for Windows/Android users

Method2 : Create a Format in GEMBA Note

① Tap "Create a new note" in All note



② Select a note

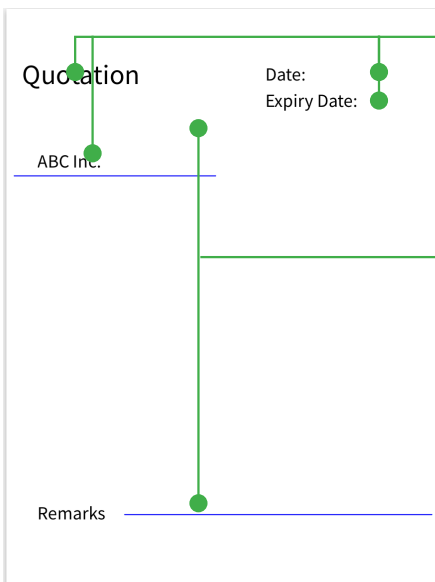


Type a note title

Change display settings

You will see the note modify the page and a new note is created
Edit and create a format

For editing a note, please check ≡ > User manual



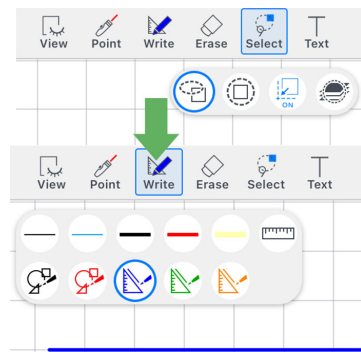
Add Headings/ Categories

Tap T and type your texts

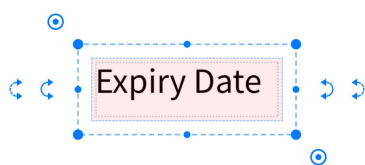
Add a Border/ Separator

+ > Add Shape and choose/draw a line with the "write" command

When you tap > turn on , the lines you draw will be linked to a graph paper



change a box size



When you drag with ●, the text size will not change, but the box size will change

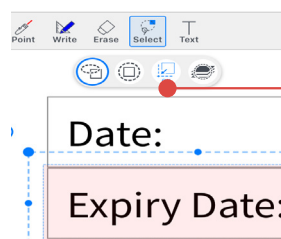
Expiry Date

When you drag with ⊙, the text size will also change along with a box size

Expiry Date

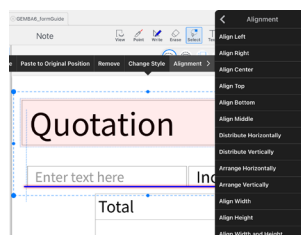
How to align a shape/text box

■ Drag a box to align




Switch on/off "guide"
When you drag a shape/text box while it is the guide is on, auto-alignment will be shown


■ Tap > circle multiple shapes/text boxes> select "Alignment" and choose an option



3. Place a Form Component/Unit

3-1 Place a Form Component to Customize Settings


① Press 

②  > Select a form component that you want to add

A form component that you select will be added

Change the display settings of form components

+ > "Add a form component" also allows you to add a component

As Android users cannot see  or + > "add a form component", you need to use the iOS/Windows ver to do so

Batch Add Form Components

Management

► Add the form components by recognizing rectangles (P8)

► Register and use Shared list (P39)

► Register Numbering settings (P31)

> "Layout" and change the width/place of the Tool Box

③ Change the settings of form components

The Tool Box for changing a layout will be shown

Arrange so as not to Overlap

Align Horizontally

Align Vertically

Align the Size

Size (mm)

Width of the Field 33.9 mm


Height of the Field 5.6 mm

Duplicate

Temporary Operation

How to lock (P10)

You can select multiple form components to change all at once

Tap  > select multiple form components to change the setting at once

You can customize a size/order of a form component

You can change field settings with the tool box ► The setting of form components (P14)

Field Settings

Border None

Background Color None

Conditional Formatting None

Margin Left/Right:2mm

Display Settings

Label

Checkmark Display Checkbox

Text Style

Alignment Horizontal Align L...

Alignment Vertical Align Mid...

Margin

Left/Right:2mm

Top: 0 (mm)

Left: 2 Right: 2

Bottom: 0

123

123

Specification: Specify a text size with numbers

Automatic: a text size will be changed automatically

Ranges: Specify a min/max text size which will be automatically adjusted to a size of the form component

Text Size

Specification Auto Ranges

14

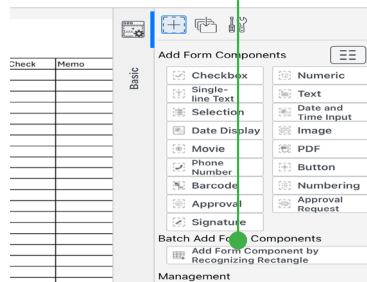
4 8 24 48 96

12 16 24 32 56

Add a Form Component by Recognizing Rectangles

You can add a form component by auto-recognizing a table in a PDF that you uploaded to Note

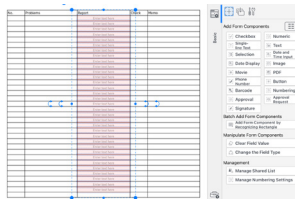
1. Open a page that you want to place a form component and select “



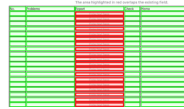
2. Select a form component that you want to add (drag ●) as they will be auto-recognized, then tap “Done”



Your chosen form component has been added

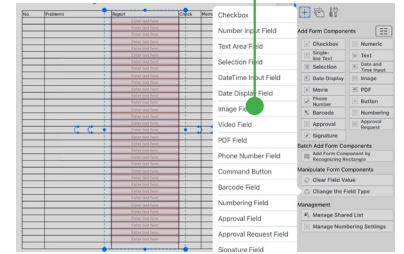


If some of the form components have been added, they will be colored red. So, drag ● and choose only the green colored ones as it means they have not been added



Changing a Form Component Type

1. Press ● to circle a form component
2. Select a type from “Change the Field Type”

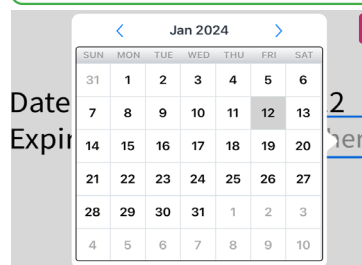


3-2 Check the Form Component's Operation

- ① Tap a form component

Date
Expiry Date ● 2024/01/12
Enter date here

- ② Check the operation by testing

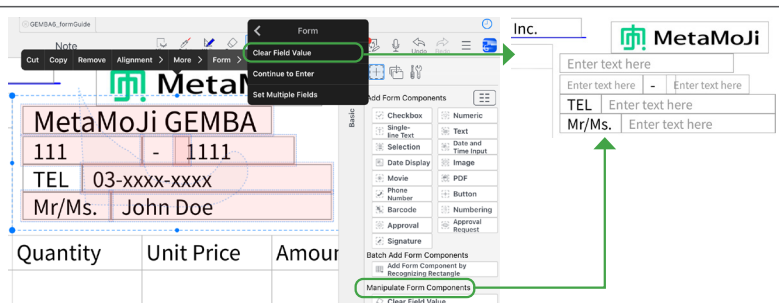


▶ The setting of form components (P14)

Clear the data

Clear the data after an operation check

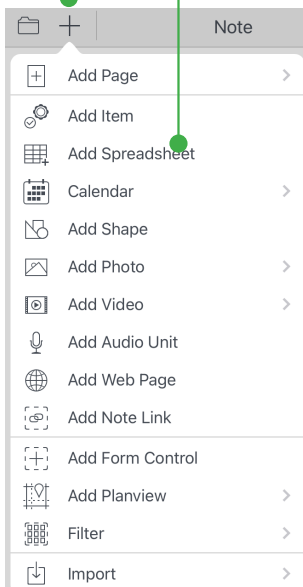
1. Tap ● and circle the form components that you want to delete/clear
2. Select “Clear the field data”



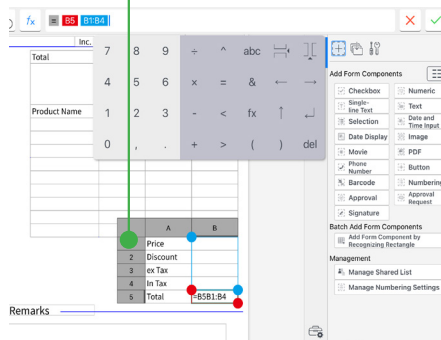
3-3 Add a Spreadsheet (Table)

You can add a table to use like a spreadsheet. You don't need to switch apps as GEMBA Note allows you to enter your data for calculations on just your note

① + > select "Add Spreadsheet"



② double tap to enter or set a formula

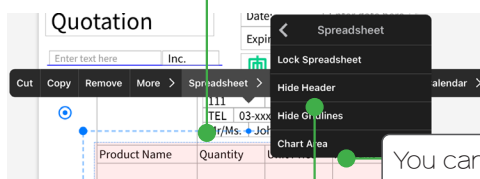
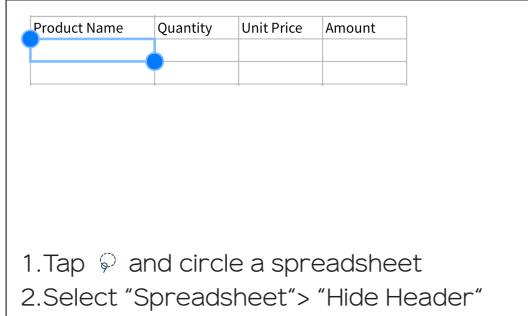


Check out on a spreadsheet function/formula with > User manual

You can also add a conditional formatting/data validation/chart

▶ What you can do with a spreadsheet

How To Hide a Header



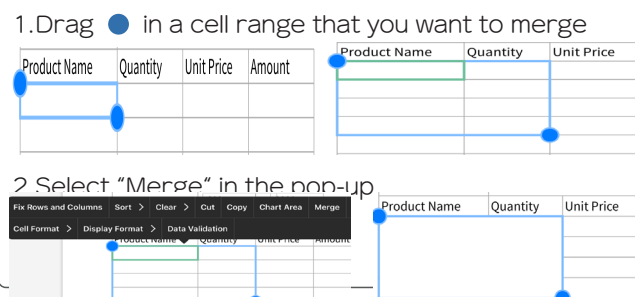
You can hide a border

If you don't want to change the values

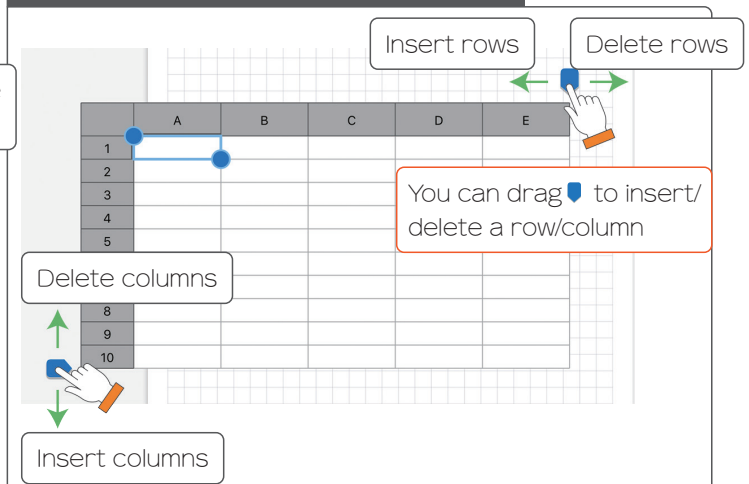
You can protect a chart if you don't want to change the formulas

1. Select a cell which allows you to edit a value
2. When the pop-up shows up, select "Cell formatting" > turn off the "Protect cell" function
3. Select a chart and choose "Chart" > "Protect a chart"

How To Merge Cells




How to increase/decrease a row/column



3-4 How to Lock a Form Component

You need to lock it after placing. You can avoid mis-editing (drag/deletion/size change/rotation) by locking your form component in advance

① Tap  and circle the form component that you want to lock

② You will have three options displayed to you from the pop-up, choose "More">"Disable Selection"/"Lock Position"/"Lock Size"/"Lock All"

Disable Selection

You can disable a selection for a photo/shape/form component by locking
You can input/select a form component

Lock position

You can lock dragging/deleting/changing or rotating your note's size

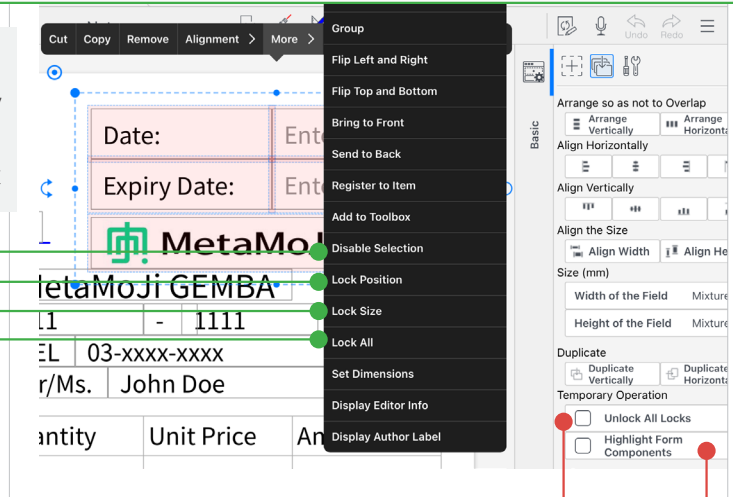
You can type/select a form component and also change copy/group/overlap

Lock Size

You can lock your note to avoid changing its size and to prevent you from accidentally rotating it
You can type/select a form component, and also change settings, dragging/deleting/cutting/copying

Lock All

You can lock everything to avoid any changes
It is used to not move any format's borders/lines



Unlock all the locks temporarily

You can edit a form component after turning on this function. When you turn it off, then it will be locked again


Form components will be locked automatically when you go to another page

You can color a form component to note something remarkable there

You can check a position/type of a form component by turning on this function so it can be colored to be remarkable



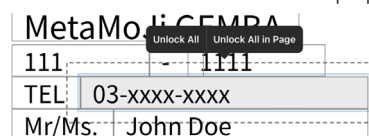
How to unlock "Lock Position"/"Lock Size"

1. Tap  and circle the form component that you want to unlock
2. When the pop-up is shown, Select "More">"Cancel Position Lock"/"Cancel Size Lock"

How to use the "Disable Selection"/"Lock All" functions

1. Tap down the form component that you wish to unlock
You need to tap each form component one by one.
You cannot circle to select multiple form components all at once if their selection or the note themselves are all locked

2. Select "Unlock All" on the pop-up menu




Tick "Unlock All Locks" to unlock all form components in a page

4.Register/Use As a Template

You can register your form as template, thus when you add new page, you can select it and it will follow that saved template.

4-1 Register As a Template

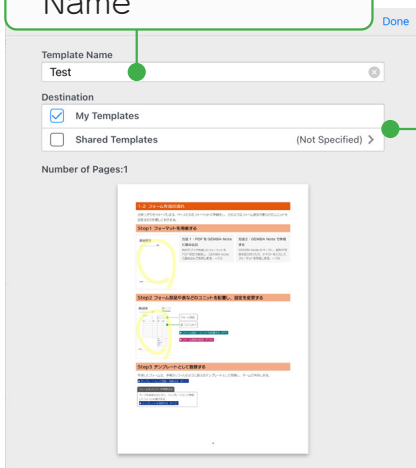
① Tap  then select the page/paper in the page list you want to register as a template



② Press down/right click on the page, then choose "Registrare/Create" > "Register Paper Template"



③ Enter the "Template Name"



④ Select the template to be either "My Templates"/"Shared Templates"

My Templates

"My Templates" are for private templates only visible for you

Shared Templates

"Shared Templates" are for public templates shared with your team members

- ① The template saved can be shared among all of your members if you select (Company-Wide Folder)
- ① You cannot select Team Folders if you have done the operation in All Note
 - Long-tap "Team Folder" then select "Team Display Settings" and untick teams
 - Long-tap a folder then tap "More" > "Folder Display Settings" and untick

⑤ Tap "Done"

 You will see a message telling if a new template name has been already used

My templates

Will be registered in the list of "My Templates"

Shared Templates

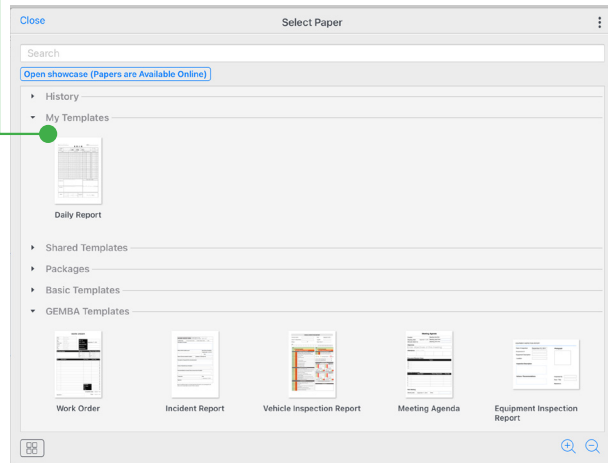
Will be registered in the list of "Shared Templates"
Will be visible in the lists of your other team members

4-2 Using a template

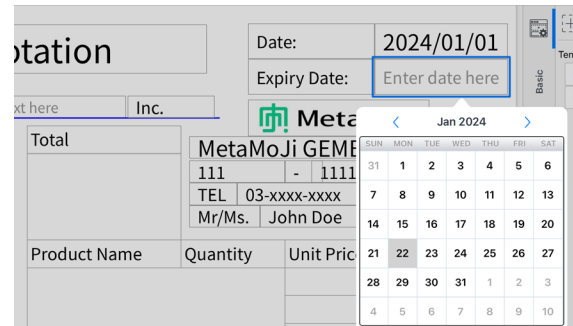
① When editing, choose + > "Add Page" > "Add using Paper Style"

② Select a template in the lists of "My Templates"/"Shared Templates"

The one you selected will be added as the template for the note

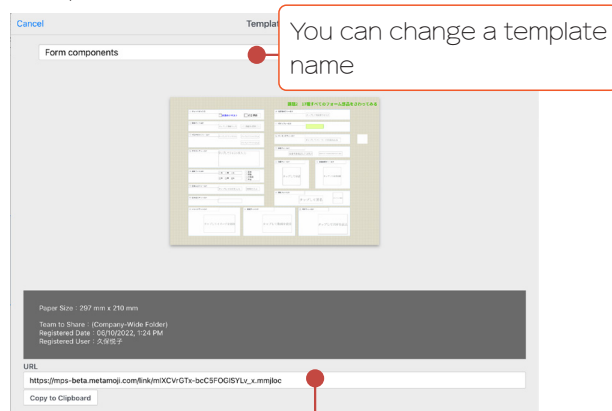


③ Tap > select the form component/unit then enter data



How To Change a Template Name and Check the Template Info

Press down/right click on the template and select "Template Info"



You can check "Team to Share", "Registered Date" and "Registered User"

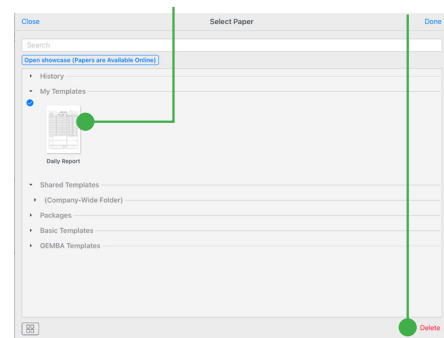
How To Update/Delete a Template

In order to update a specific template, you need to register a new template and delete the form already registered. (You cannot update a template that is already registered)
The Steps for Deleting a Template

1. Select > "Edit"



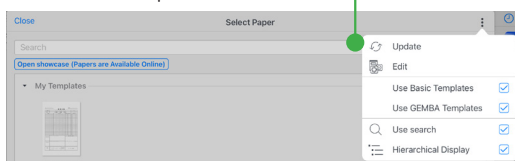
2. Tap the template you want to delete and select "Delete"



3. Tap "Done"

How to see the latest version of the Shared Templates list

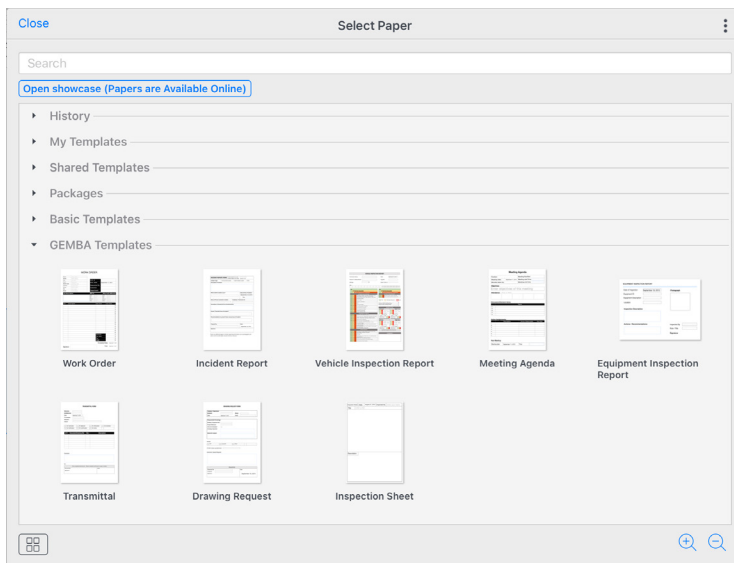
1. Select > "Update"



Now your Shared Templates list is up to date. You also can see changes if other team members edit/delete contents(templates) inside

4-3 About Default Templates

When editing, you can select a useful template by + > “Add Page”> “Add using Paper Style”> “Default templates (GEMBA Templates)”



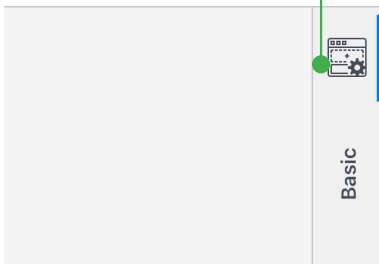
5.Settings of Form Components


You can add a new form component and also change the settings of the form component you added. In GEMBA Note for Business 6, you can select multiple form components and change the settings all at once

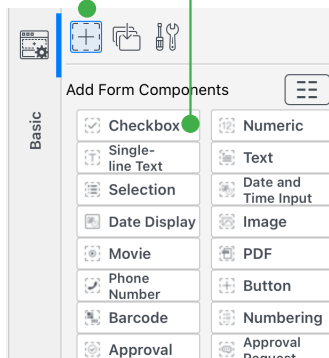
5-1 Checkbox

5-1-1 Add a Checkbox

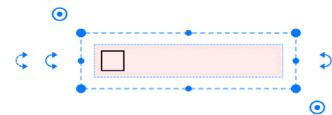
① Tap  to show the toolbox



② Select  > "Checkbox"



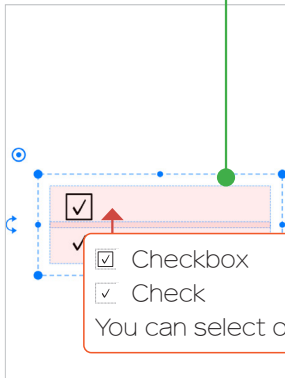
A new checkbox is added



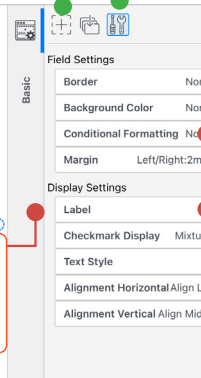
You can tick/untick a checkbox with taps

5-1-2 Customize The Settings of Checkbox

① Tap  then circle a checkbox



② Tap  > 



③ Customize "Field Settings"/"Display Settings"


▶ Add Conditional Formatting (P42)

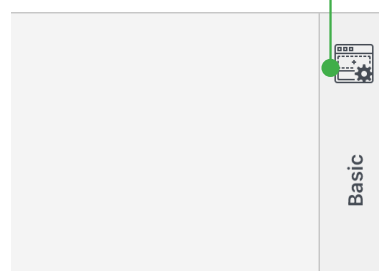
You can add texts as a label after a tickbox



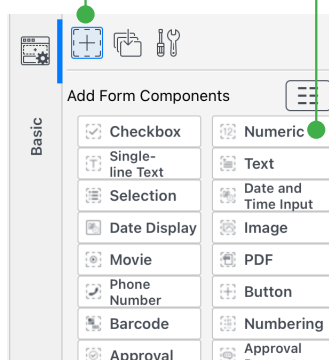
5-2 Numeric Field

5-2-1 Add a Numeric Field

① Tap  to show the tool box



② Select  > "Numeric"



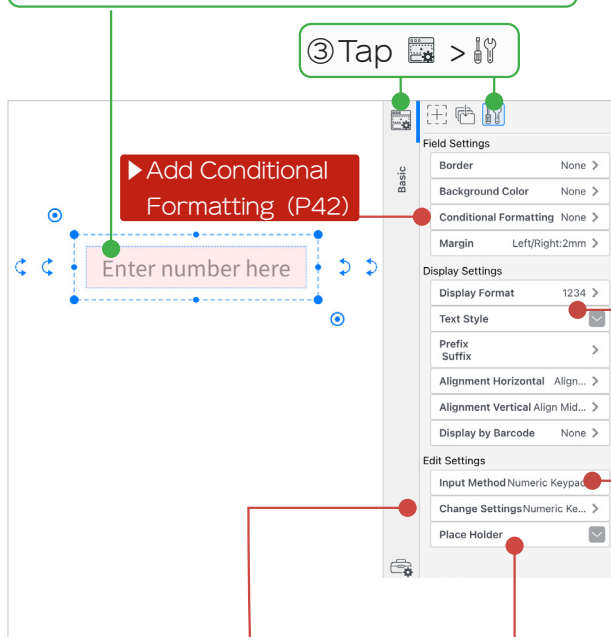
Now a new Numeric field is added



5-2-2 Customize a Numeric field and Enter numbers

① Tap  and select a Numeric field

② Customize "Numeric Field Settings"



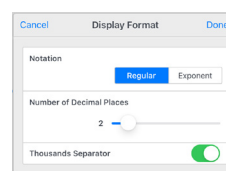
Select "Input Method" to customize display settings. Select "Change Settings" to change the values in "Minimum"/"Maximum"

You can customize the default text settings before entering

Enter numeric values here

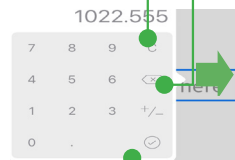
Display Settings

Display Format



You can clear values

You can delete values

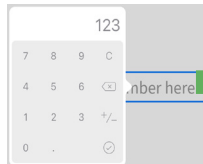
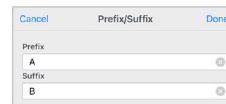


1,022.56

You can lock the value

Prefix/Suffix

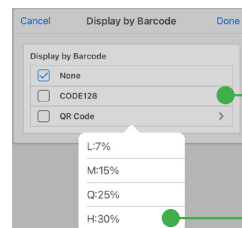
You can set a text shown with a value



A123B

Display by Barcode

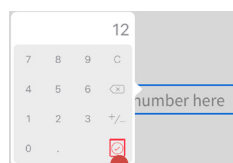
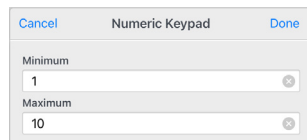
You can display entered values as a barcode/QR code



Edit Settings (Input Method)

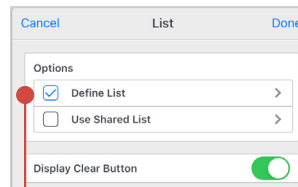
Numeric Keyboard

You can set a minimum/maximum values

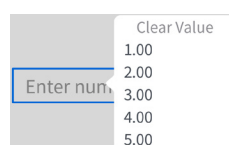


You cannot lock values which are out of the range

List

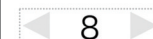


Select from "Define list"



Register/use a shared list (P39)


Stepper

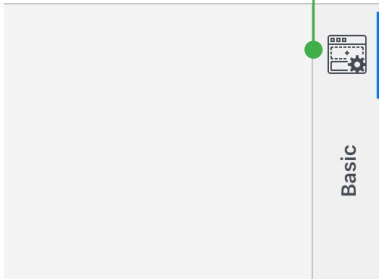


Tap to increase/decrease values as you customized
Select "Display Settings"> "Alignment Horizontal"> "Align Center"

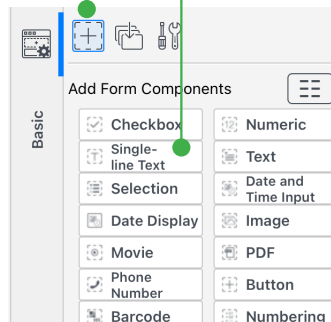
5-3 Single-Line Text

5-3-1 Add a Single-line text field

① Tap  to show the toolbox



② Select  > "Single-line Text"




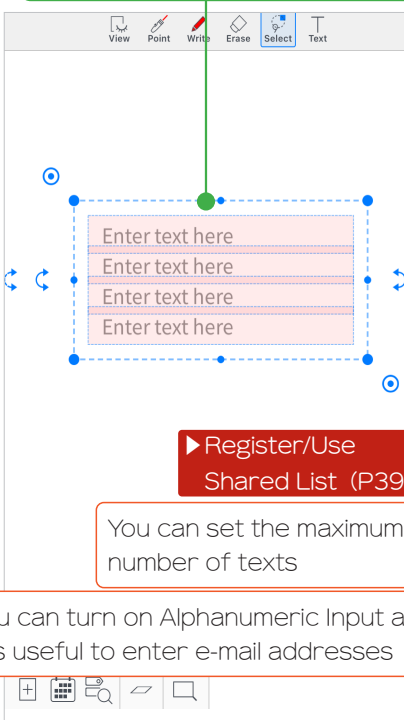
Now a new Single-line Text is added



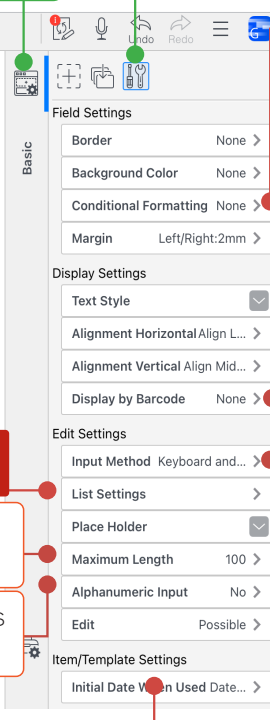
Tap to select from the list or enter texts

5-3-2 Customize Single-line Text Field Settings

① Tap  and circle a Single-line Text field



② Tap  > 



③ Customize a Single-line Text field settings

▶ Add Conditional Formatting (P42)

Display by Barcode

You can display a URL entered in a Single-line Text field



Input Method

You can select choices from the list when you choose "List"

You can enter texts with a keyboard or select choices from the list when you choose "Keyboard and List"



▶ Register/Use Shared List (P39)

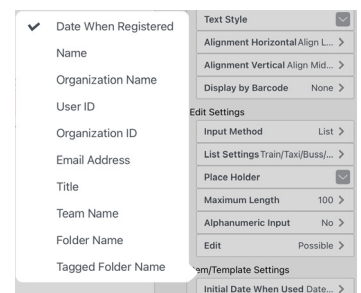
You can set the maximum number of texts

You can turn on Alphanumeric Input as it is useful to enter e-mail addresses

How to show an account information automatically when using an item/template

Name: John Doe

1. Select "Item/Template Settings" > Initial Date When used > Name (the category that you want it to be shown automatically from the account information in GEMBA Note)
 2. Press down a Single-text Line field and select "More" > "Register Item" to register 1. as a new item
 3. Select the item created in 2. by + > "Add Item" thus the Single-line text field which automatically displaying the category selected in 1. will be added
- If you create a template with a page containing 1., when you open the template, the page will be open and show the category automatically customized in
1. ▶ Register/Use as a template (P11)

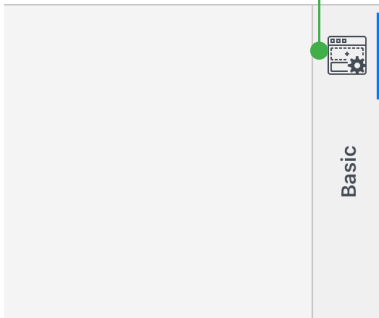


5-4 Text Field

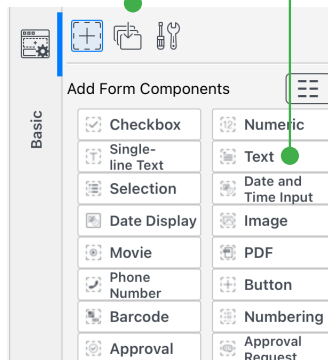
Add a Text field which are allowed multi-lines

5-4-1 Add a Text field

① Tap  to show the toolbox



② Select  > "Text"



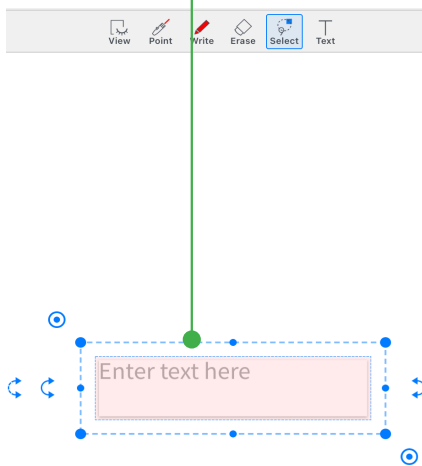
A new Text field is added



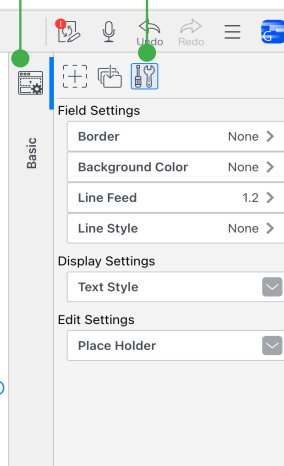
Tap to enter texts

5-4-2 Customize The Settings Of a Text field

① Tap  and circle a text field



② Tap  > 




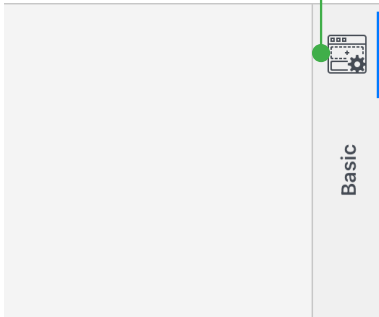
③ Customize the settings of a text field


5-5 Selection field

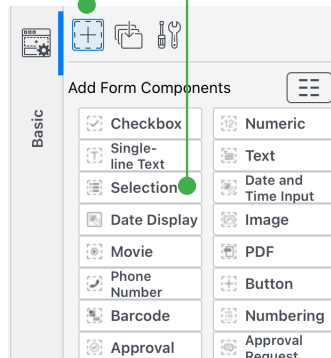
You can select an option by tapping on the field

5-5-1 Add a Selection Field

① Tap  to show the toolbox




② Tap  > "Selection"

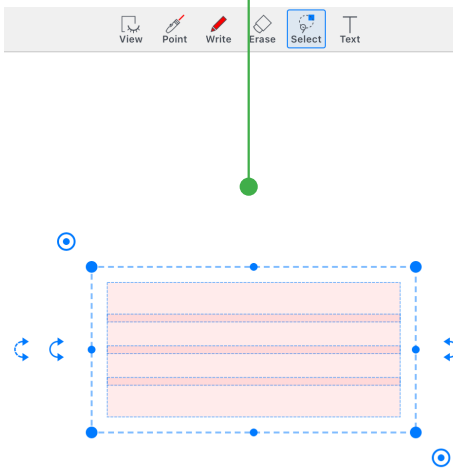


A new selection field is added

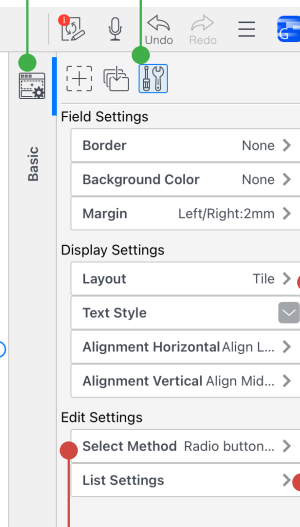


5-5-2 Customize the Settings of a Selection Field

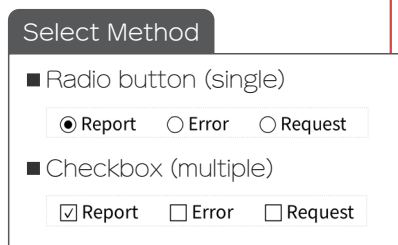
① Tap  then circle a selection field



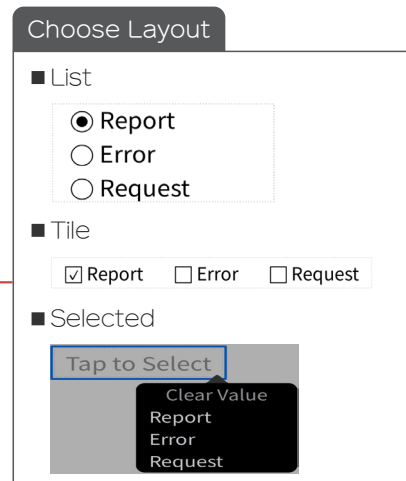
② Tap  > 



③ Customize the settings of a selection field



► Register/use Shared List (P39)

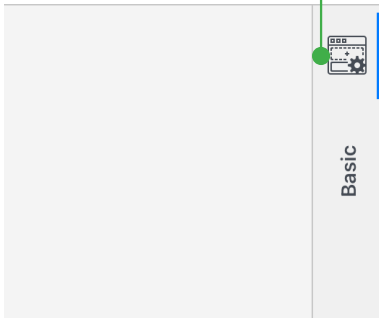


5-6 Date and Time Input Field

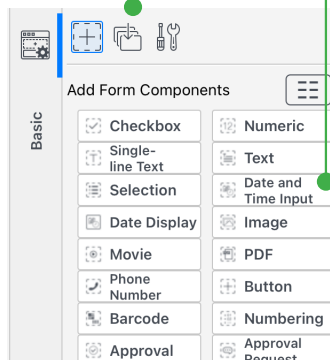
You can enter date/time with this field

5-6-1 Add/enter a Date and Time Input field

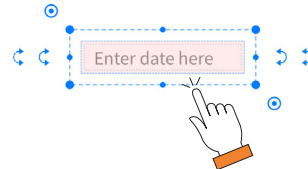
① Tap  to show the toolbox



② Tap  > Date and Time Input field

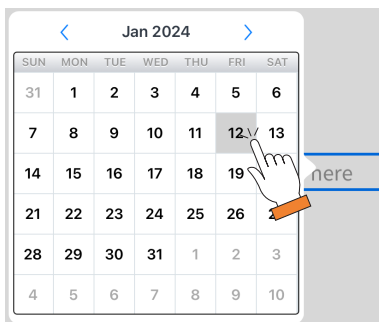


A new Date and Time Input field is added



③ Tap the Date and Time Input field


④ Select a date



The date you selected is shown in the field

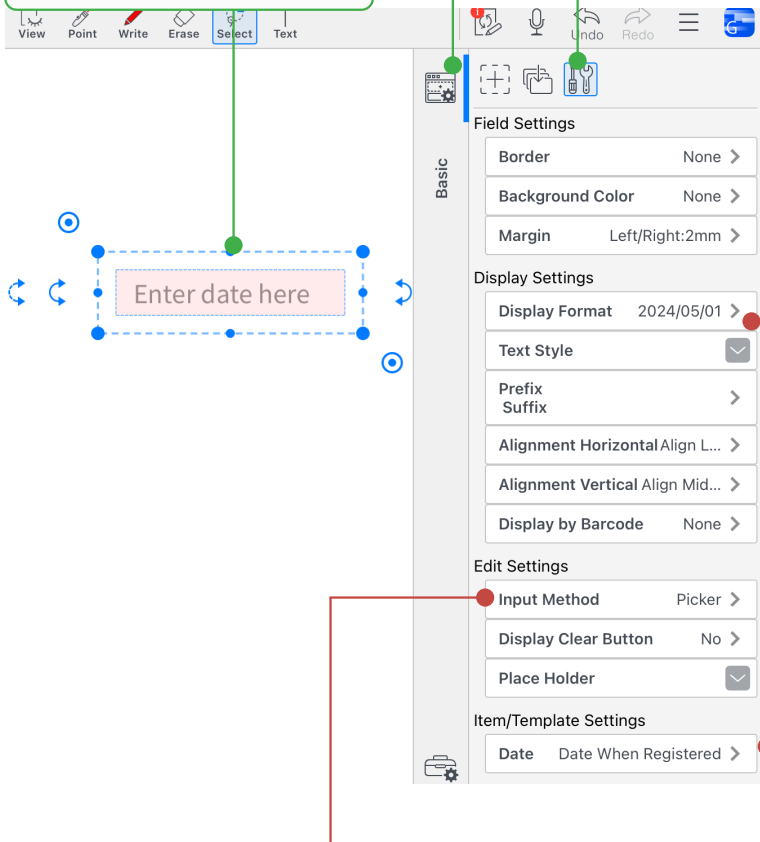
2024/01/12

5-6-2 Customize the Settings of a Date and Time Input Field

① Tap  then, circle a Date and Time Input field

② Tap  > 

③ Customize the settings of a Date and Time Input field



Field Settings

- Border: None >
- Background Color: None >
- Margin: Left/Right:2mm >

Display Settings

- Display Format: 2024/05/01 >
- Text Style: >
- Prefix: >
- Suffix: >
- Alignment Horizontal: Align L... >
- Alignment Vertical: Align Mid... >
- Display by Barcode: None >

Edit Settings

- Input Method: Picker >
- Display Clear Button: No >
- Place Holder: >

Item/Template Settings

- Date: Date When Registered >

Display Format

■ Date Only

Cancel Display Format Done

Date Only Time Only Date and Time

Date Format

2024/05/01

2024/5/1

24/05/01

■ Time Only

Cancel Display Format Done

Date Only Time Only Date and Time

Time Format

3:00 AM (Locale Dependent Format)

03:00

3:00

■ Date and Time

Cancel Display Format Done

Date Only Time Only Date and Time

Date Format

2024/05/01

2024/5/1

24/05/01

20240501

2024_05_01

Time Format

3:00 AM (Locale Dependent Format)

03:00

Input Method

You can customize it when you select "Display Format"> "Date Only"

■ Calendar

< Jan 2024 >

SUN	MON	TUE	WED	THU	FRI	SAT
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

here

■ Picker

Select Date Done

#	Month	Year
8	September	2020
9	October	2021
10	November	2022
11	December	2023
12	January	2024
13	February	2025
14	March	2026

Auto-display settings when you use an item/template

You can auto-display a Date and Time Input field linkage to the page/the date of use

■ When you open the registered form as a template

▶ Register/user as a template (P11)

■ When you add the registered Date and Time Input field as an item by + > "Add Item"

Cancel Date of Use Done

Specify Relative Date

Year Month Week Day

3 days before

2 days before

1 days before

Added Date

1 days after

2 days after

3 days after

4 days after

Cancel Date of Daily Page Done

Specify Relative Date

Year Month Week Day

3 days before

2 days before

1 days before

The day of Diary Page

1 days after

2 days after

3 days after

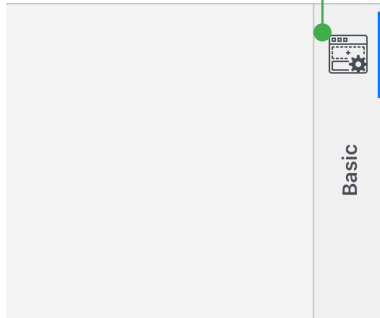
4 days after

5-7 Date Display Field

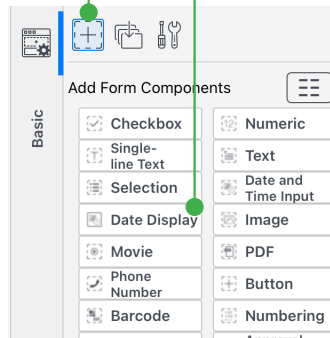
Auto-display the date which is set based on The day of Diary Page. You can use in a Diary Page

5-7-1 Add/enter a Date Display field

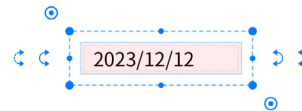
① Tap  to show the toolbox




② Tap  > "Date Display"

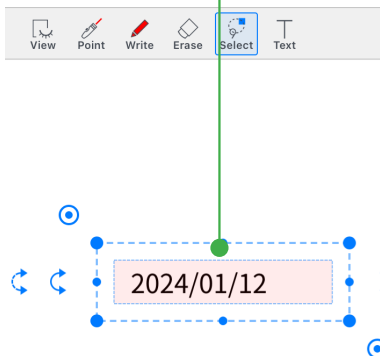


A new Date Display field is added and will display the date of the Diary Page

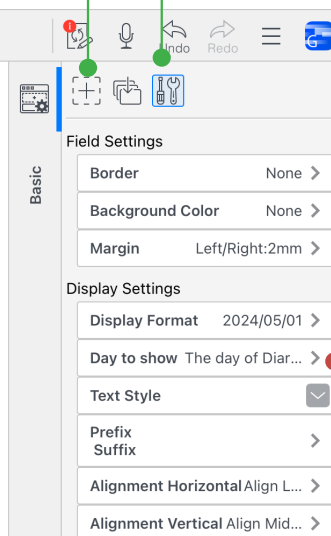


5-7-2 Customize the settings of Date Display field

① Tap  then circle a Date Display field

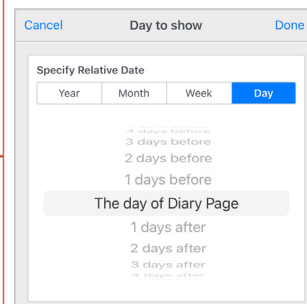


② Tap  > 



③ Customize the settings of Date Display field

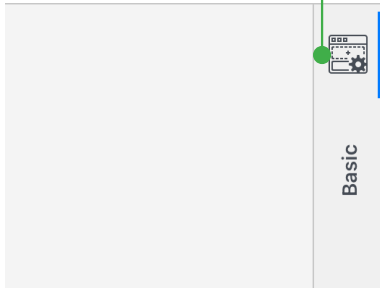
You can select the display date




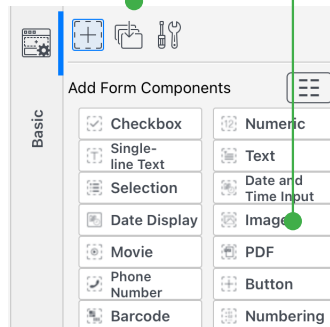
5-8 Image Field

5-8-1 Add an Image field

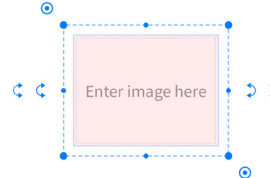
① Tap  to show the toolbox



② Tap  > "Image"

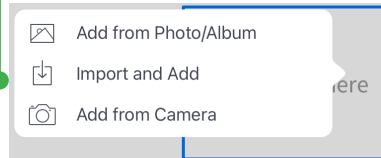


A new Image field is added

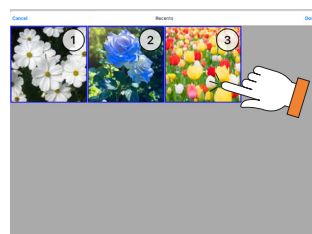


③ Select the Image field

Select "Add Photos from Photos/Albums"



④ Select a photo you want to add



The photo you selected will then be added




About the access permission for photos/videos on your device (since iOS 14)

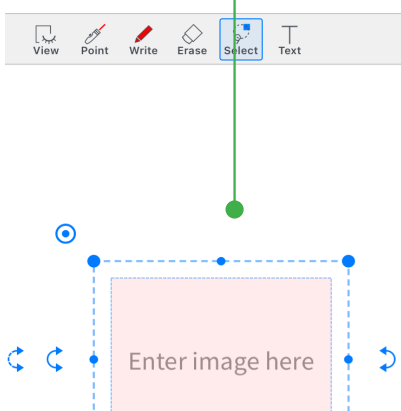
When you use this function, you are asked to grant permission to access either your selected photos only or all the photos. You can select one option.

i You can change accessible photo settings with tapping > "Add Photo"> "Change Accessible Photos"

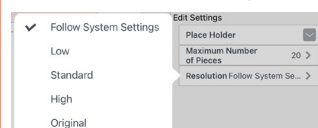
i You can also change it with the app from iOS "Settings"> "Privacy & Security"> "Photos"

5-8-2 Customize the Settings of an Image Field

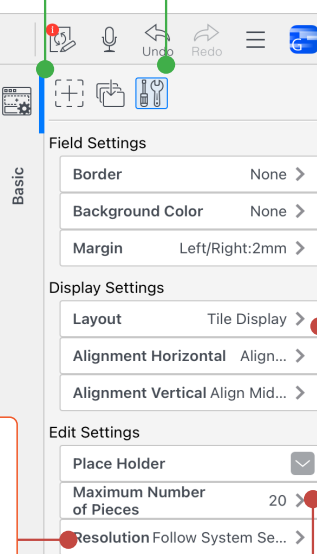
① Tap  then circle an Image field



You can change a resolution of an image

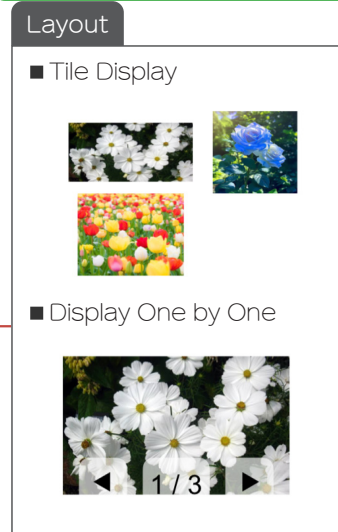


② Tap  > 



You can set the maximum number of Images which can be displayed

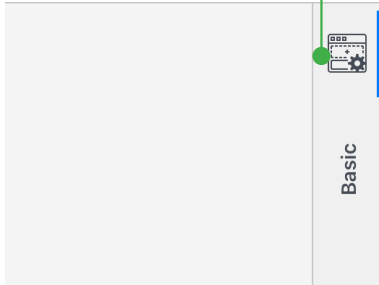
③ Customize the settings of an Image field



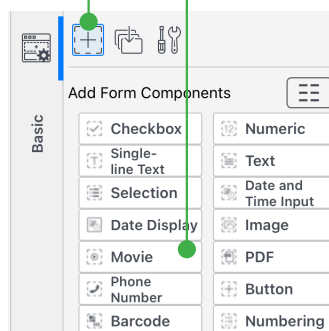
5-9 Video field

5-9-1 Add a Video field

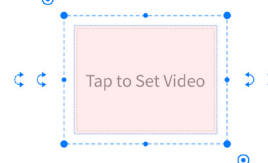
① Tap  to show the toolbox



② Tap  > "Movie"



A new Video field is added

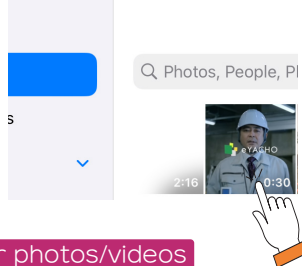


③ Select the Movie field

Select "Add Video from Photos/Albums"



④ Select the video you want to add



⑤ You can play the video to check and tap "Done"



You can crop the video

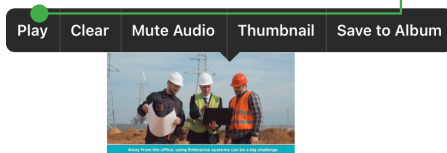
A new video is added



▶ About the access permission for photos/videos on your device (since iOS14) (P22)

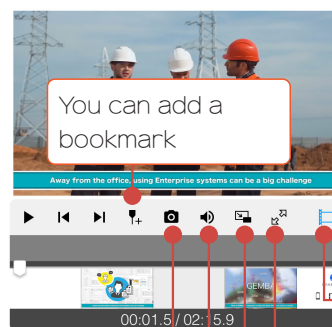
5-9-2 Play a video

① Tap  then circle a Movie field



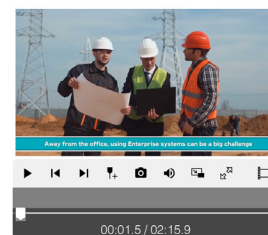
② Tap "Play"

The video starts playing

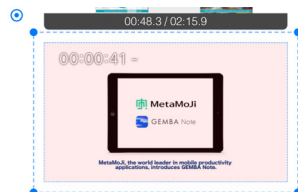


You can stop playing it by tapping other areas

You can hide the video scene bar



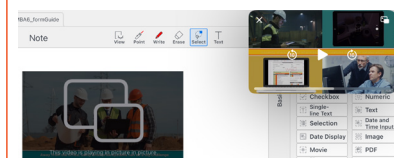
You can take a screenshot and it will be added on the page
When you tap the screenshot, it starts playing from the point the screenshot was taken



You can mute the sound

You can play the video with full screen mode

You can use a picture in picture mode so that you can play and edit it at the same time



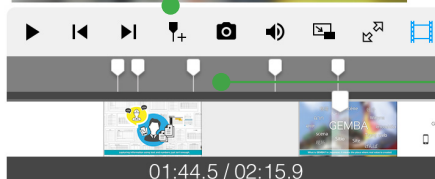
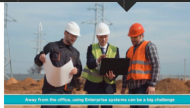
5-9-3 Create a still image from a video

① Tap  then circle a Video Field


② Tap "Play"

③ Tap the bookmark button on a scene that you want to screenshot as a still image

Play Clear Mute Audio Thumbnail Save to Album



Bookmarks are added

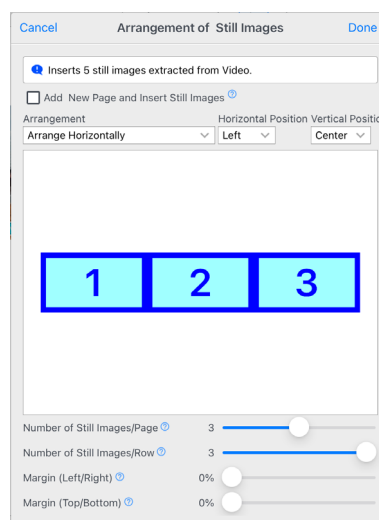
④ Select  to stop playing

⑤ Select "Get Still Image"

Play Clear Mute Audio Thumbnail Save to Album Get Still Image



⑥ Select "Done" after reviewing the alignment settings



The still images captured from the bookmarks of the video are added



How to play a video from a still image

When you select a still image, the video will be played in the Video Field based on the place of the bookmark

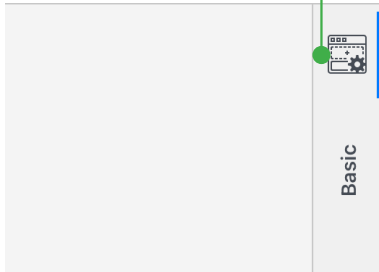


If you add a still image and play it, the video will start playing in that still image field

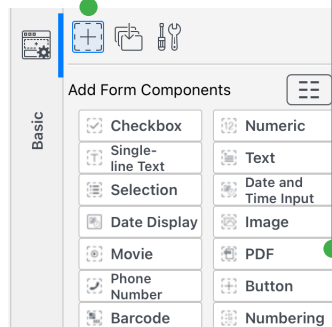
5-10 PDF Field

5-10-1 Add a PDF Field

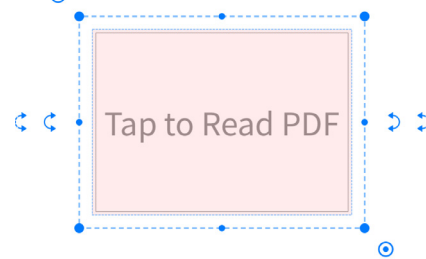
① Add  to show the toolbox



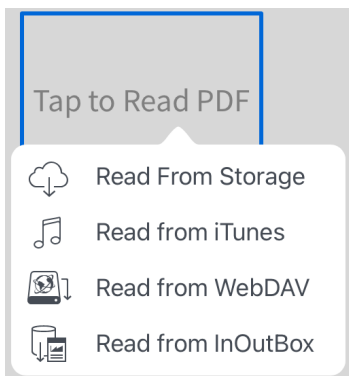
② Tap  > "PDF Field"



A new PDF Field will be added




③ Select a PDF Field and select the PDF file that you want to add

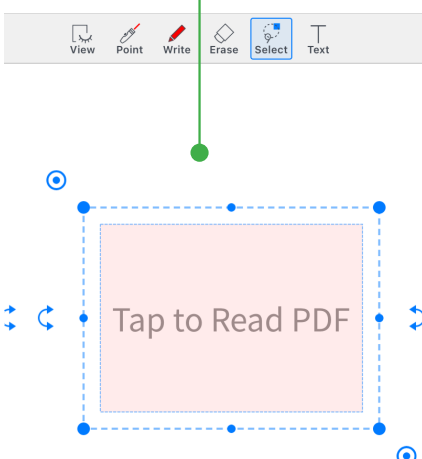


The PDF file you chose was added

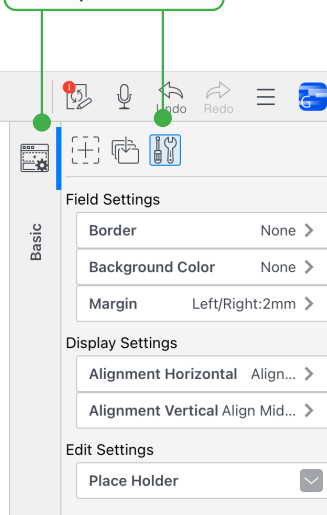


5-10-2 Customize a PDF Field settings

① Tap  then circle a PDF Field



② Tap  > 

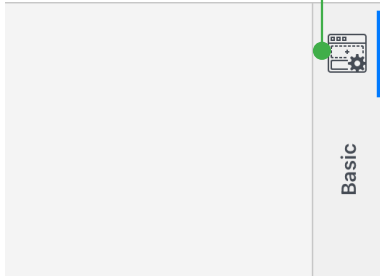



③ You can customize a PDF Field settings

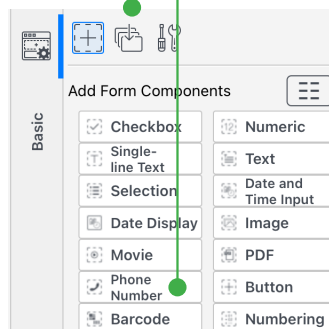
5-11 Phone Number Field

5-11-1 Add/enter a Phone Number Field

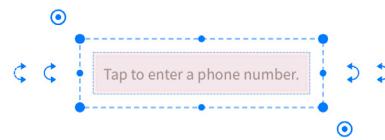
① Tap  to show the toolbox



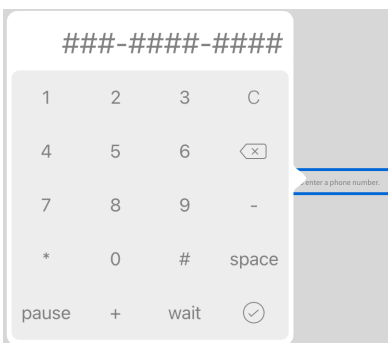
② Select  > "Phone Number Field"



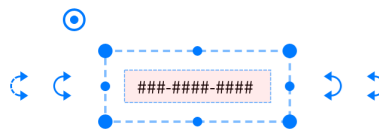
A new Phone Number Field is added




③ Select a Phone Number Field then enter phone numbers

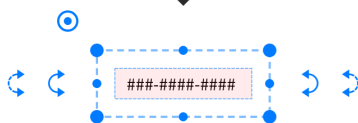


The phone numbers that you have entered will be shown

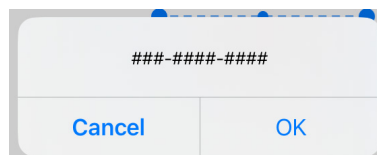


5-11-2 Make a phone call

① Tap  > circle a Phone Number Field > "Call"




② Tap "OK"




You can make a phone call

How to make a phone call when you are on View mode

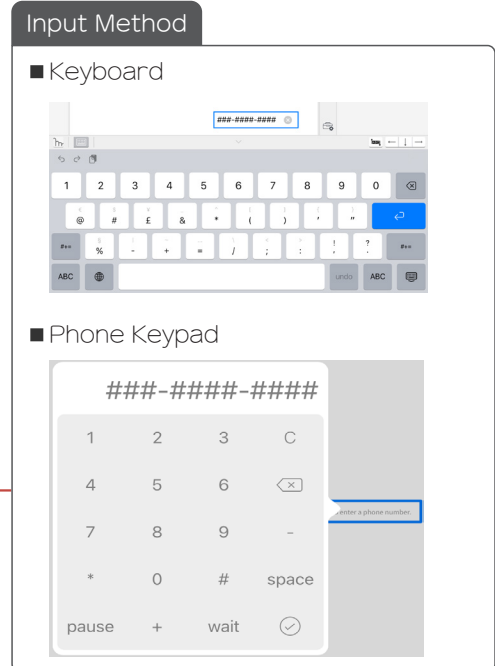
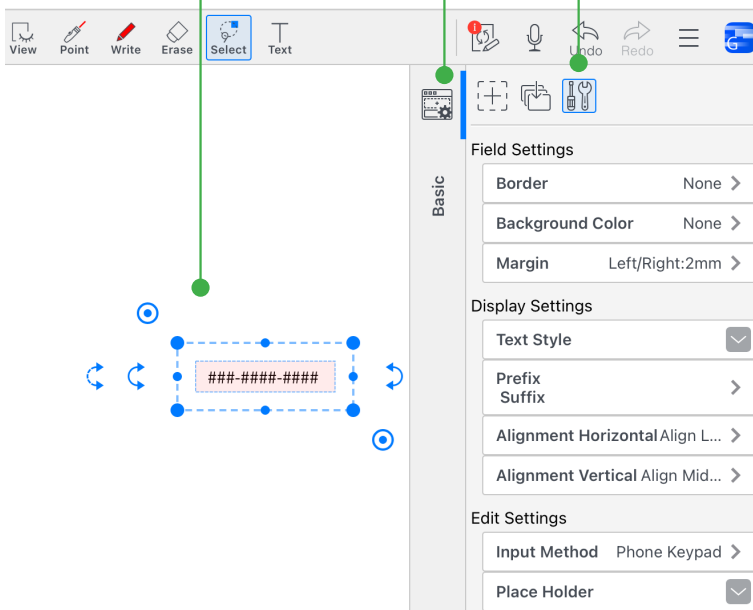
You just need to tap a Phone Number Field to make a phone call after tap  to change to View mode

5-11-3 Customize the Settings of a Phone Number Field

① Tap  then circle a Phone Number Field

② Tap  > 


③ Customize the settings of a Phone Number Field




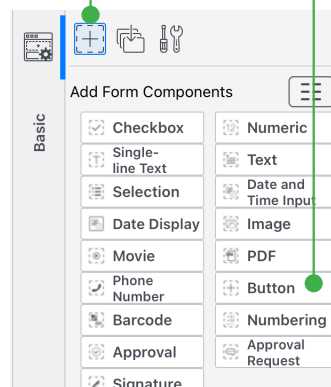
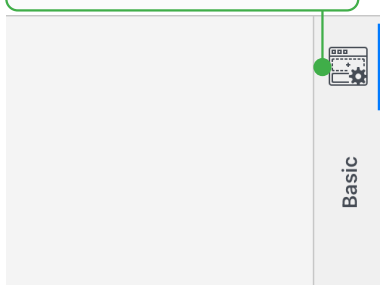
5-12 Command Button

You can add a button which you just need to tap it to start certain actions such as "Print", "Send E-mail", "Open URL"

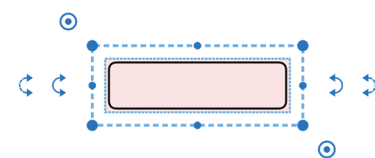
5-12-1 Add a Command Button

① Tap  to show the toolbox

② Tap  > "Command Button"



A new Command Button is added

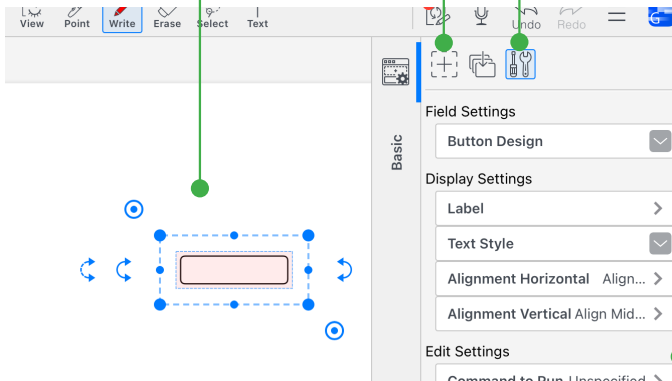


5-12-2 Customize the settings of a Command Button

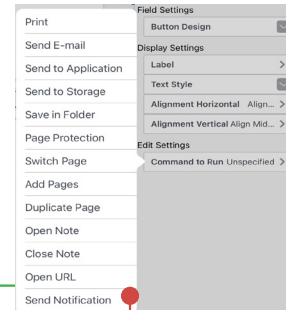
① Tap  the circle a Command Button

② Tap  > 

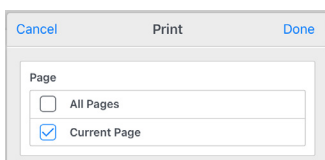
③ Tap "Command to Run" then select an action you want to add to a Command Button



Let's select "Print" as an example

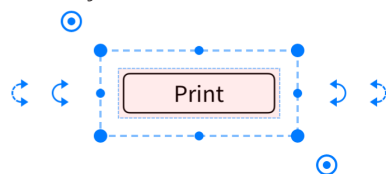


④ Select one



⑤ Tap "Done"

After coming back to the Command Button settings screen, you can customize the other settings such as "Button Design", "Display Settings" then tap "Done" after you finished




The Command Button was customized as you did. When you tap the Command Button, the action will be started

Print	You can print based on the two options "Current Page"/"All Pages"
Send E-mail	You can send an e-mail of "Current Page"/"All Pages" in "PDF"/"JPEG"/"CSV"/"GEMBA file". You can enter the "address"/"subject" in advance
Send to Application	You can send "Current Page"/"All Pages" to other applications in "PDF"/"JPEG"/"CSV"/"GEMBA file"
Send to Storage	You can send "Current Page"/"All Pages" to online storage in "PDF"/"JPEG"/"CSV"/"GEMBA file"
Save in Folder	You can save a Note/Page Clip in a shared folder
Protect Page	You can customize which page to protect from editing
Switch Page	You can jump to a page you specify and also change Magnification Ratio to "Full Paper"/"Paper Width"
Add Pages	You can specify and add new page(s) right after the current page
Duplicate Pages	You can copy page(s) which has a button inside and duplicate to a specified location You can copy work details and duplicate for other day you specify
Open Note	It is useful when you want to open a manual note You can specify a page of a Note to open
Close Note	You can close a Note you are in and go back to Notes List

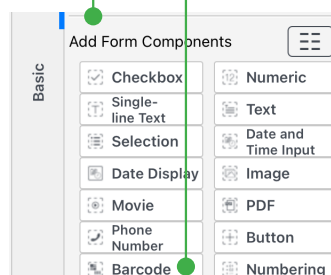
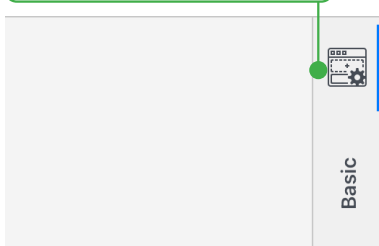
❗ If you linkage to "direct", you can see another option "Send to Direct". Please check out "User Manual by ≡ > "User Manual"

5-13 Barcode Field

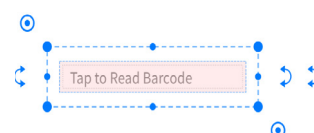
5-13-1 Add a Barcode Field

① Tap  to use the toolbox


② Select  > "Barcode Field"



A new Barcode Field will be added

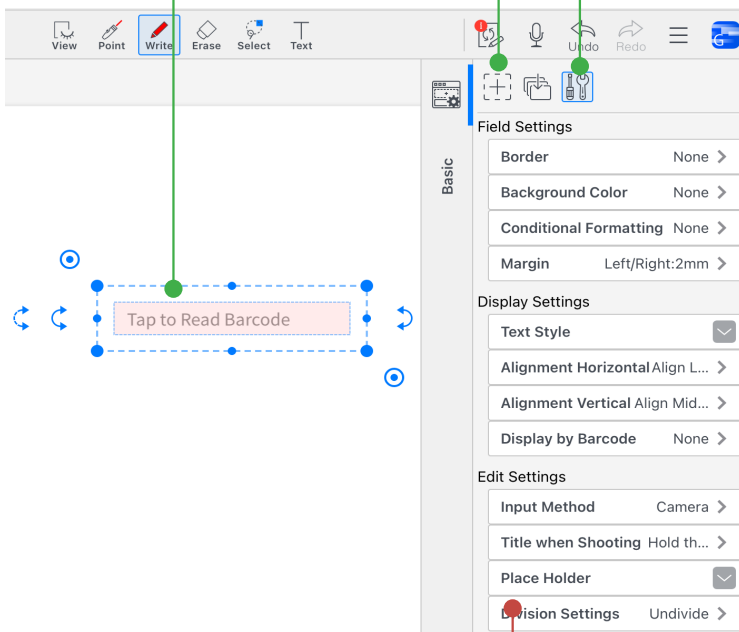


5-13-2 Customize the Settings of a Barcode Field

① Tap  then circle a Barcode Field

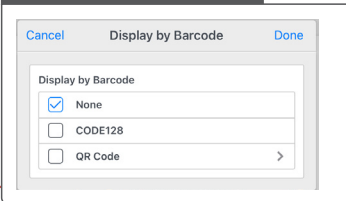
② Tap  > 

③ Customize the settings of a Barcode Field

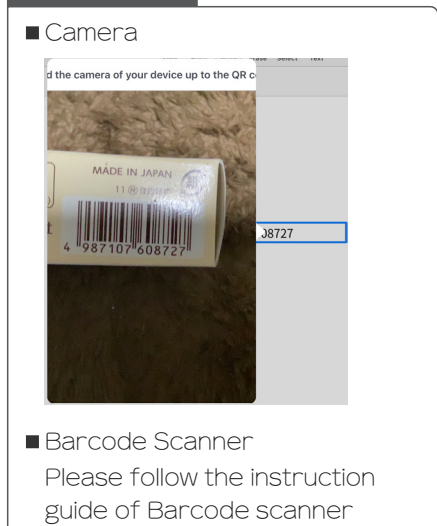


▶ Add a conditional formatting (P42)

Display by Barcode

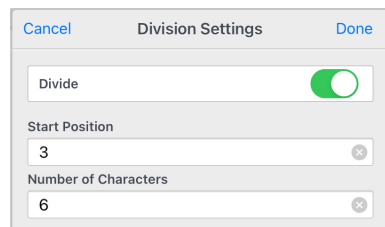


Input Method



How to scan a part of a barcode

Tap "Division Settings" and specify "Start Position"/"Number of Characters" then it will display a part of a barcode as you specified



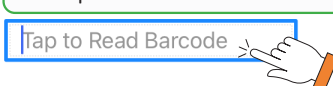
123456

5-13-3 Scan Data with a Barcode Scanner

Here is the instructions in case you select Customize the settings of a Barcode Field (P29) > "Input Method"> "Barcode Scanner". Firstly, you need to pair your iPad with a barcode scanner.

Please check on the instruction guide for a barcode scanner for pairing steps

① Tap on a Barcode Field



② Scan a barcode with a barcode scanner



Data is entered

001234567895


5-14 Numbering Field

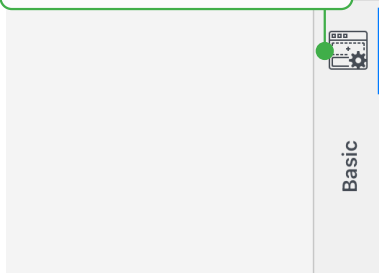
You can use the auto-numbering function in case the numbers have patterns such as serial numbers

If you add a Numbering Field on a Note template, it will be auto-numbered in the order you open the template

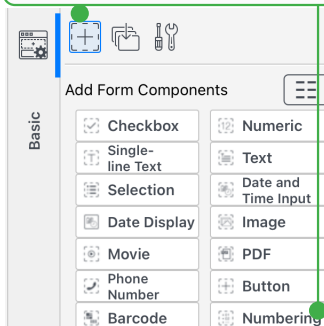


5-14-1 Add a Numbering Field

① Tap  to show the toolbox




② Select  > "Numbering Field"

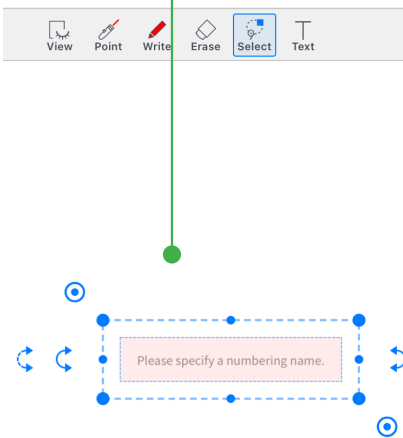


A new Numbering Field will be added

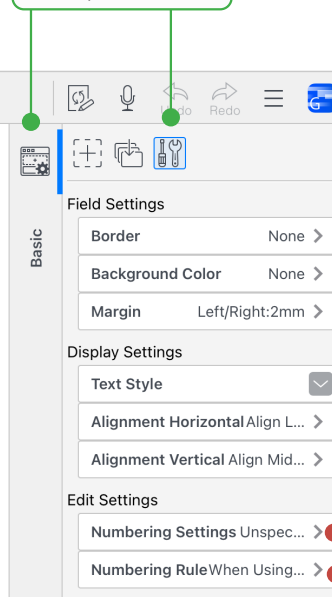


5-14-2 Customize the settings of a Numbering Field

① Tap  then circle a Numbering Field



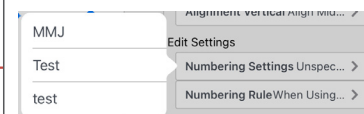
② Tap  > 



③ Customize the Settings of a Numbering Field

Customize "Numbering Settings"

Choose a numbering option from the list



► Customize Numbering Settings (P31)

When can you do numbering

You can save a Note as a template which has a Numbering Field in a team folder

► Register/use as a template (P11)

A20190625002

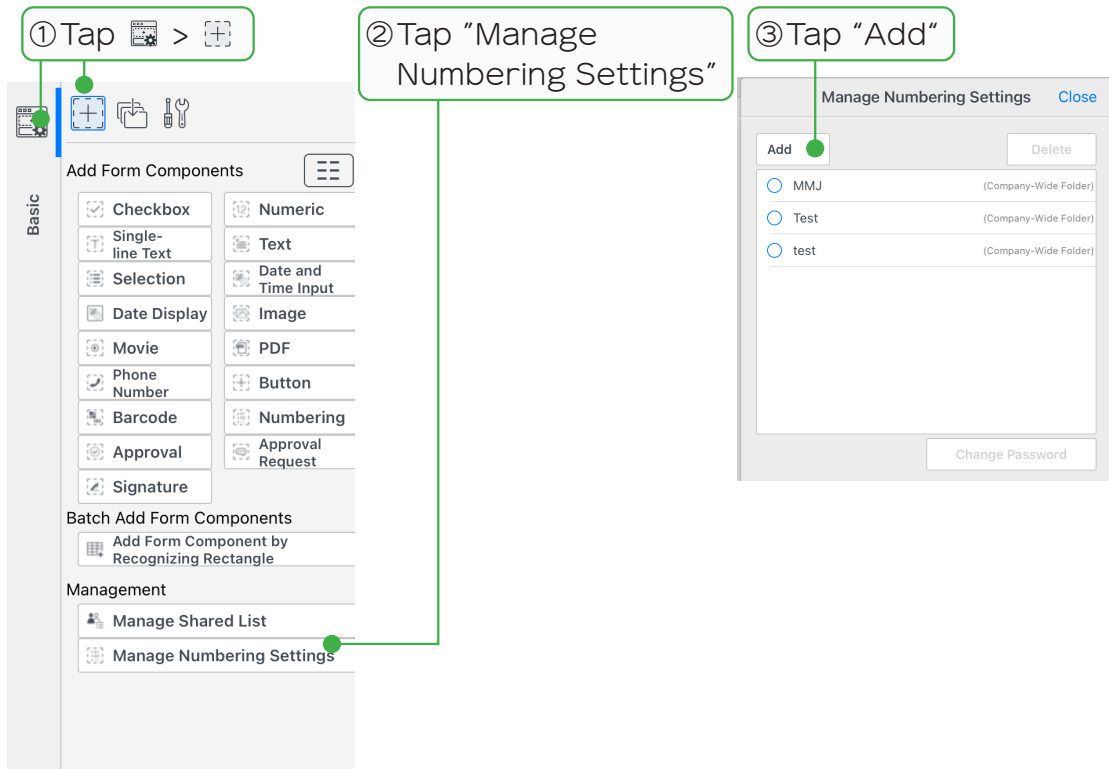
■ To manually number the template

Tap a Numbering Field to add a number manually when you open a template

■ To do the numbering automatically

Open Note templates in a team folder thus they will be automatically numbered in the order you open

5-14-3 Customize Numbering Settings



④ Enter new numbering information and a password then tap "Done"

Cancel Add Numbering Settings Done

Numbering Name
Name

Format Settings
Prefix
Date

Serial Number Settings
Number of Digits
Start Number
Auto Reset

Password
Confirm Password

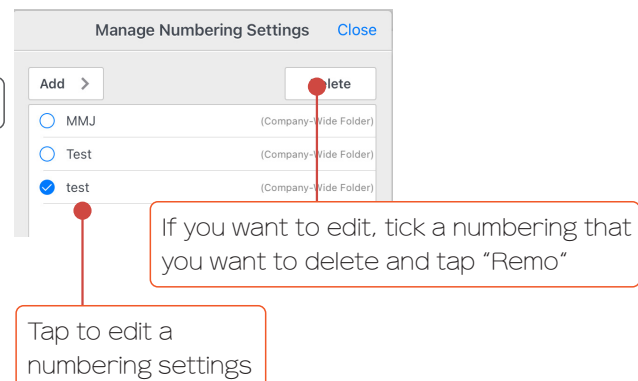
Enter a Numbering Name

Enter Prefix (name/character at the beginning of a numbering)

Enter Date for the after Prefix

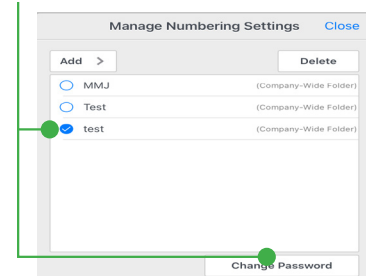
A20190625002

⑤ Tap "Close" after you saw the new numbering in the list



Change Password

If you forget a password, you need to ask admin to change it
Admin can change a password by choosing a numbering and tap "Change Password"

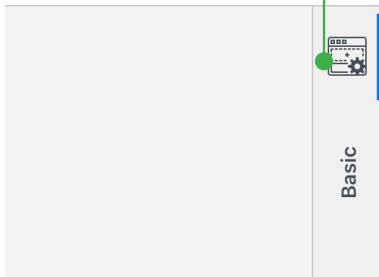


5-15 Approval Field

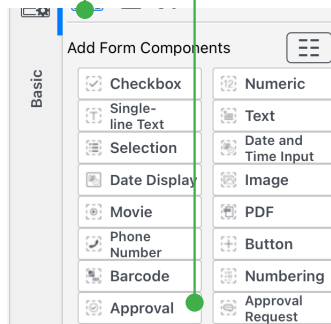
You only need to tap to approve and also check when/who approved

5-15-1 Add an Approval Field

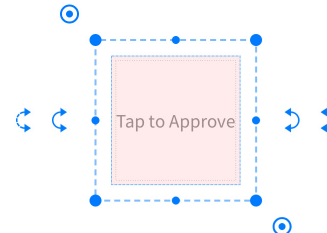
① Tap  to show the toolbox




② Tap  > "Approval Field"

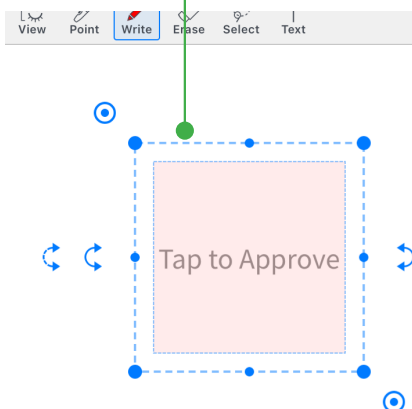


A new Approval Field is added

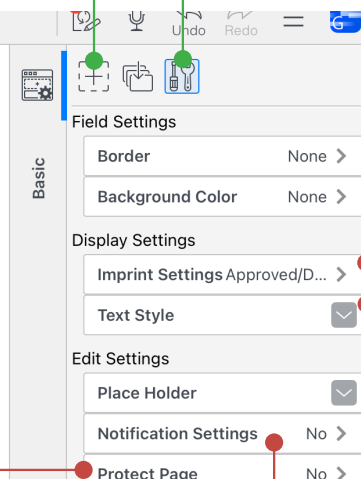


5-15-2 Customize the settings of an Approval Field

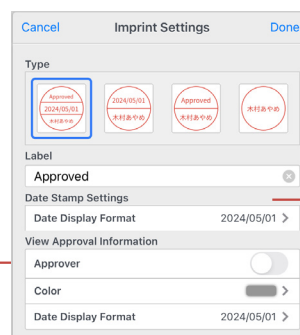
① Tap  then circle an Approval Field



② Tap  > 



③ Customize the settings of an Approval Field

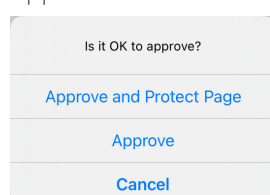


Customize Text Style

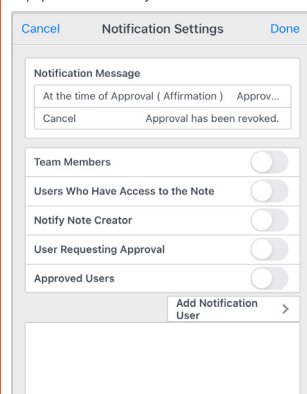
You can change font style/font size/color

Protect Page

You can stop editing functions any longer after it is approved, thus the page cannot be edited anymore. If you choose "Select", the pop-up below will be shown after you tapped a Approval Field



You can send notification messages to other members when you approve/reject



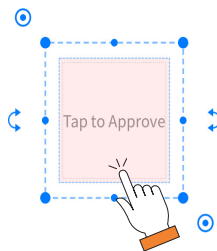
i You can notify about the location of the Shared Note/Note to members who need to approve

i Please make sure to close the note before notifying the Note's location

5-15-3 Steps for approval Instruction for Approvers

Open a note that you need to approve

① Tap an approval field



② If a pop-up message is shown, select an option to approve

A new approval stamp is added as the Approval form is approved



Once an Approval Field is approved, you no longer select it

If you set for a notification, then the other members will receive the approval notification

Please make sure to close the Note if you approve something

When you tap a approval stamp, you can check an approver/date of approval



If you tap "Cancel" then the field will be empty. This option is only visible for approvers

You can unlock the page when you tap "Cancel" to cancel the approval

Tap down/right clock on the page in All page> "Page Attribute"> "Display protection Info"> "Cancel" to unlock it

5-15-4 Check an Approval Information

Open the Note which is approved to check the details

You can also open a Note from the pop-up message/Notification List

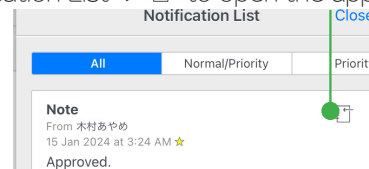
How to open a Note from a notification

You just need to tap the notification, thus the Note approved/reboked will be open shortly

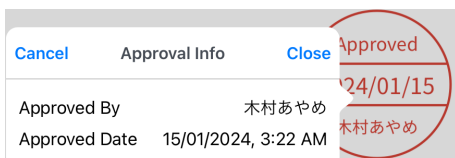


How to open a Note from the Notification List

Tap ≡ > "Notification List" > [Note Icon] to open the approved Note to check



You can check the information of an approver/Date of Approval when you tap on an approval stamp



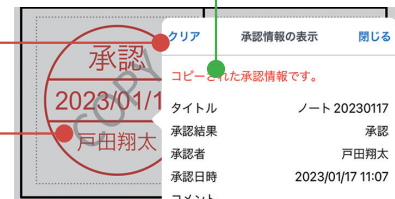
If you copy an approval stamp

It will show a "COPY" watermark on an Approval Field, if you copy and paste it

A caution message will be shown if you tap a copied approval stamp

Tap "Clear" to make the field empty


a "COPY" watermark is visible even if it is exported as a PDF file

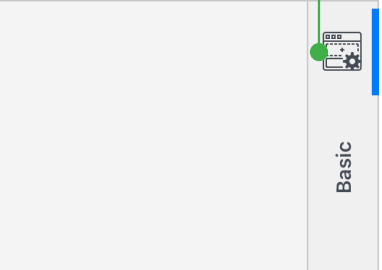



5-16 Approval Request Field

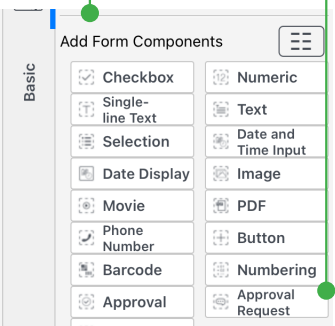
You can select an approver and request them and also send notifications. Approvers can check about details on Approval List

5-16-1 Add an Approval Request Field

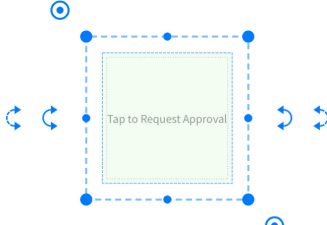
① Tap  to show the toolbox




② Select  > "Approval Request Field"

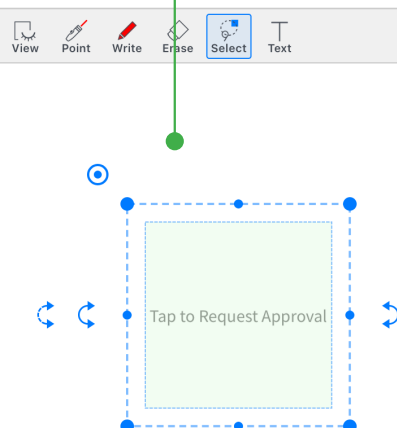


A new Approval Request Field will be added





5-16-2 Customize the settings of an Approval Request Field

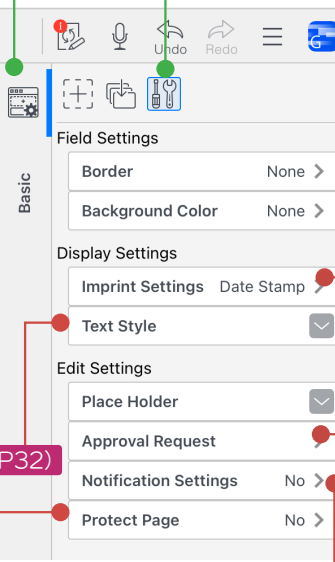
① Tap  then circle an Approval Request Field



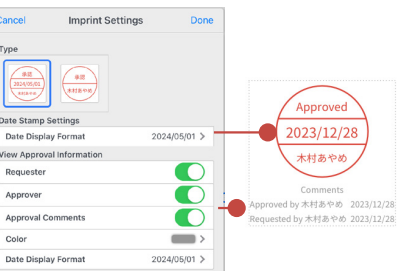
▶ Customize Text Style (P32)

▶ Protect Page (P32)

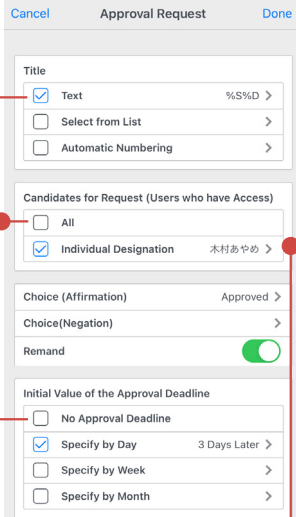
② Tap  > 



③ Customize the Settings of an Approval Request Field



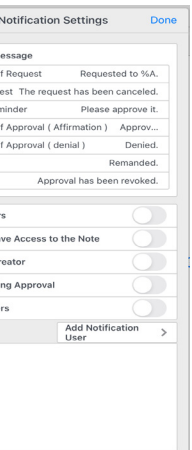
For example, Person A (Requester) requests an approval from Person B (Approver) in three days



Note 20231228
Tap to Approve
Requested by 木村あやめ
Deadline: 2023/12/31 15:00

Notification settings

You can send notification to members when it is approved/cancelled



- When you request for an approval, approvers will receive a notification
- When an approver approves it, the requester will receive a notification
- When an approver cancels it, a requester will receive a notification

① You can send notifications to "Team Members"/"Users Who Have Access to the Note"/"Notify Note Creator" from "Notification Settings"

② You also can send notification to "Users Requesting Approval"/"Approved Users" from "Notification Settings"

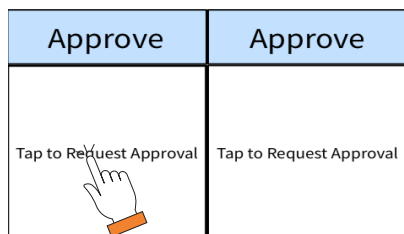
You can select multiple users in "Candidates for Request" thus, you can request for multiple approvals at once

▶ Request for multiple approvals at once (Method1) (P35)

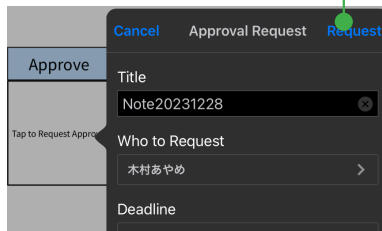
5-16-3 Request for an approval

5-16-3-1 Request for an Approval on one Approval Request Field

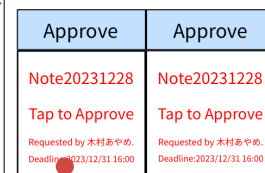
① Tap on an Approval Request Field



② Select "Request" after entering the Title/Who to Request/Deadline



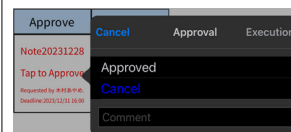
This is an example: When a Person A requests for approvals from a Person B/Person C



After you selected "Request"

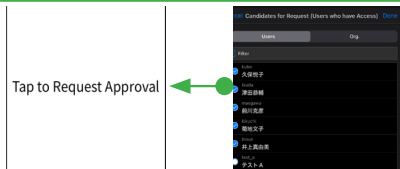
- you are no longer able to select the Approval Request Field as it is already approved
- Notifications will be sent to approvers if you customize them on "Notification Settings"
- Please make sure to close the Note after you created an Approval Request Field

When you select "Tap to Approve", you can remind/cancel it

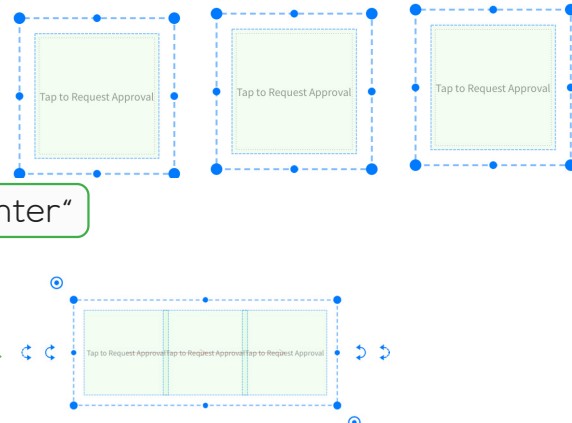


5-16-3-2 Request for Multiple Approvals At Once Method 1

① Create an Approval Request Filed which multiple members are selected in "Candidates for Request" in 「Customize the settings of an Approval Request Field (P34)」

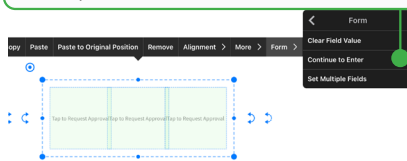


② Tap to copy the Approval Request Field created in ① and paste as you need



③ Select multiple Approval Request Fields

④ Tap "Form" > "Continue to Enter"



⑤ Tap on one of the Approval Request field

⑥ Tap "Who to Request" to choose a member and tap "OK"

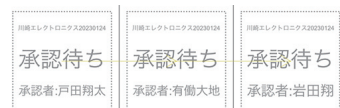


Multiple members will be added as approvers

⑦ Tap "Request"



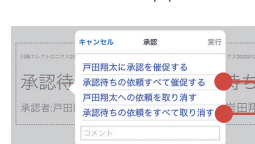
You can request for multiple approvals



▶ After you tapped "Request" (P35)

How to Remind/Cancel All At Once

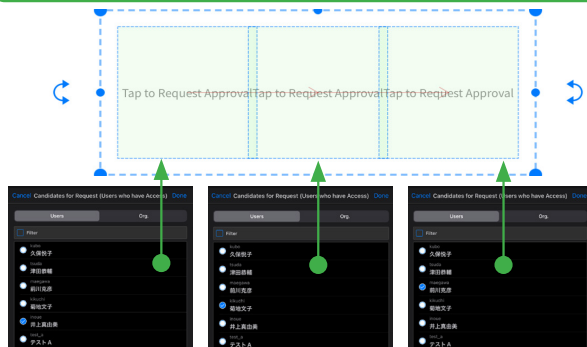
Tap "Tap to Request Approval" to remind/cancel for approvals



5-16-3-3 Request for Multiple Approvals At Once Method 2

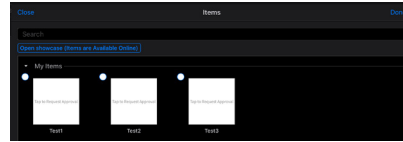
Since Feb,2023, You can request for approvals all together when there are multiple Approval Request Fields which have one approver each

- ①「Customise the settings of an Approval Request Field (P34)」
Create and align Approval Request Forms which have only one member in "Candidates for Request"



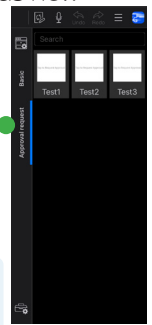
Register as an Item and add easily

You can register Approval Request Fields as new Items and add them in case you need



Items can be registered in the toolbox

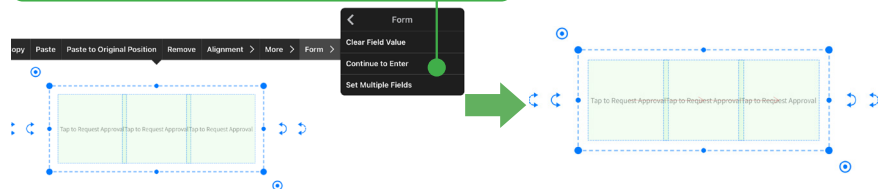
For more information on how to add new Items/register to the toolbox, access ≡ > "User Manual"



If you already registered it as an Item, you just need to align as you want

- ② Tap then circle the multiple Approval Request Fields

- ③ Tap "Form" > "Continue to Enter"



- ④ Tap on the Approval Request Field

- ⑤ Tap "Request" if "Who to Request" is as you set



You can request all together



▶ After tapping "Request" (P35)

▶ How to remind/cancel all together (P35)

5-16-4 Open a Note which is requested for an approval

Manage approvers

Open the Note which was requested for an approval

You can open a Note via Approval List/Notification/Notification List

How to open a Note via Approval List

In All Notes, You can tap > to see the list of Notes requested for approvals (Approval List)
You can open a Note requested for an approval from "What was Requested"

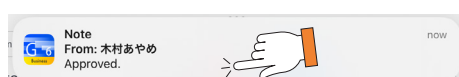


You can filter with "Location and Duration"

You can also filter with "Note Name"/"Title"/"Requester"/"Status"

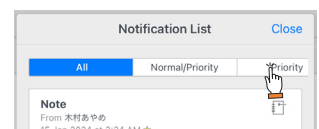
How to open a Note from notification

When you tap a notification, a requested Note will be open



Open a Note from the Notification List

In All Note, tap ≡ > "Notification List" to see the notification.
Tap to open an approved/cancelled Note to check



5-16-5 Approve Manage approvers

① Select an Approval Request Field

This is an example when a Person A is an approver:

承認	承認
不具合管理表20210610 タップして承認 今村里美より依頼 期限:2021/06/13 15:00	不具合管理表20210610 承認待ち 承認者:有働大地 期限:2021/06/13 15:00

② Select an option and tap "Execution"

承認	承認
不具合管理表20210610 タップして承認 今村里美より依頼 期限:2021/06/13 15:00	承認 キャンセル 承認 実行 承認 差し戻し 確認しました

You can add comments

If you select "Cancel", the field will be made blank. Please note that this option is only visible for the approver

A new approval stamp will be added

承認	承認
承認 2021/06/10 戸田翔太	不具合管理表20210610 承認待ち 承認者:有働大地 期限:2021/06/13 15:00

When you tap on an approval stamp, you can see an approver/date of approval

承認	承認取消	承認情報の表示	閉じる
承認 2021/06/10 戸田翔太		タイトル 承認結果 承認者 承認日時 コメント	不具合管理表20210610 承認 戸田翔太 2021/06/10 16:27 確認しました

5-16-6 Check approval details

Open an approved Note via Approval List/notification/Notification List and check the details

When you tap on an approval stamp, you can see an approver/date of approval

承認	承認取消	承認情報の表示	閉じる
承認 2021/06/10 戸田翔太		タイトル 承認結果 承認者 承認日時 コメント	不具合管理表20210610 承認 戸田翔太 2021/06/10 16:27 確認しました

You can also see comments

If you copy an approval stamp

A "COPY" watermark will be shown if you copy an approval stamp and paste it

You can see a message when you tap on an approval stamp

Select "Clear" to make the field blank

You can see the "COPY" watermark even it is exported as a PDF file

承認	検印
承認 2021/06/10 戸田翔太	クリア 承認情報の表示 閉じる コピーされた承認情報です。 タイトル 承認結果 承認者 承認日時 コメント

5-17 Signature Field

You can create a field which adds your signature. This makes it useful when you want to sign a contract with a customer physically

5-17-1 Add a Signature Field

① Tap to show the toolbox

Basic
Basic


② Tap > "Signature Field"

Add Form Components
Basic
Checkbox
Single-line Text
Selection
Date Display
Movie
Phone Number
Barcode
Approval
Signature
Numeric
Text
Date and Time Input
Image
PDF
Button
Numbering
Approval Request

A new Signature Field is added

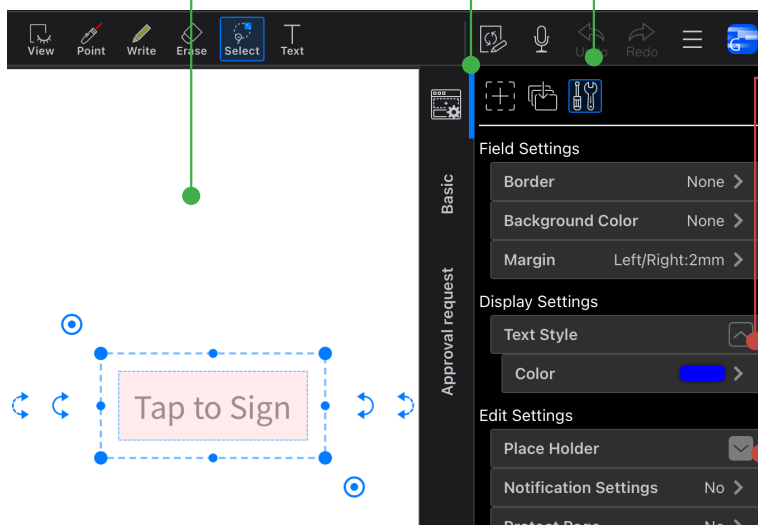
Tap to Sign
Tap to Sign

5-17-2 Customize the settings of a Signature Field

① Tap  then circle a Signature Field

② Tap  > 

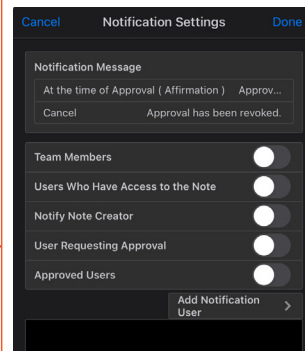
③ Customize the settings of a Signature Field



You can change the ink color



You can notify members when you approve/cancel with a signature



5-17-3 Signing a signature

① Tap a Signature Field



② Sign and tap "OK"



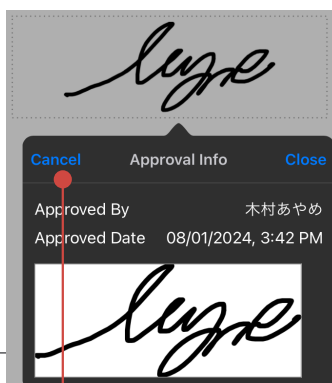
A new signature is added



① the members will receive notifications if you customize the "Notification Settings" to do so

① You can no longer select the Signature Field as it has been confirmed

Check the information of the Signature



When you select "Clear", the Field will be made blank
This option is visible only for the one who approved

If you copy the Signature

A "Copy" watermark will be shown if you copy and paste the signed Signature Field

An error message will be shown when you tap the signed Signature Field

Tap "Clear" to erase a signature



The watermark (COPY) will be displayed even if it was exported in a PDF form

6. Advanced settings of form components

6-1 Register/use Shared List

Managing lists in text/CSV files using the Shared List function is very convenient.

The form components that are compatible with Shared Lists are “Text Input Field”/“Number Input Field”/“Selection Field”

6-1-1 Save a Shared List in Storage

You can create/save a Shared List in Storage with the rules below

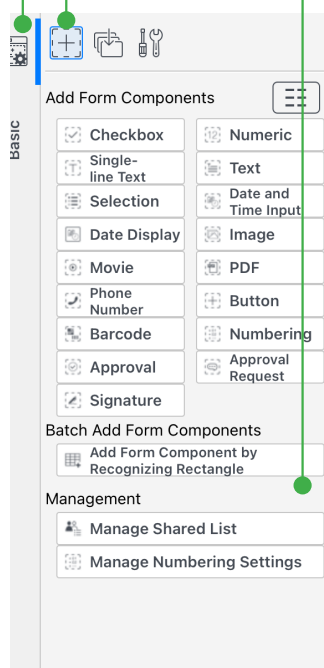
File extension	Descriptions
txt	one list item = one text line
csv/tsv	data divided with a comma/tab row 1:row name after row 2 : list orders *1

* 1 You can use Numeric field as well in case a list of orders are made of only numbers

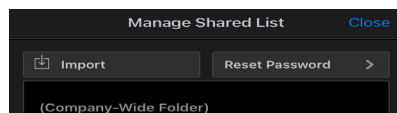
6-1-2 Register a Shared List

Open a Note that is located in a Team Folder

① Tap > > “Manage Shared List”



② Tap a Team Folder that you want to register a Shared List to



③ If you create a Shared List with the option “(Company-Wide Folder)” then all the organization members can use it

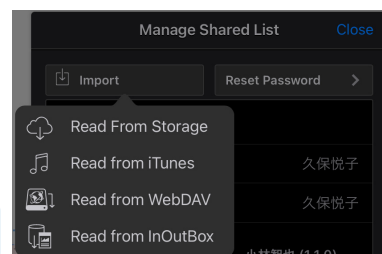
④ This option is not visible when you open a Note in a Private Folder

④ Enter “List Name”/“Password” then tap “Done”

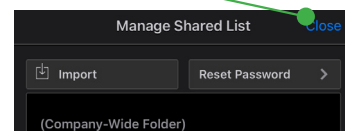
A screenshot of the 'Register List' dialog. It has 'Cancel' and 'Done' buttons. There is a 'List Name' field with the text 'text'. Below it, it says 'Please set a password to update or delete this list.' and 'Admin Password Settings'. There are two password fields: 'Admin Password' and 'Confirm Password'. A green line points from the 'Done' button to the next step.

a New Shared List will be added

③ Tap “Import”> choose a storage and a file



⑤ Tap “Close”




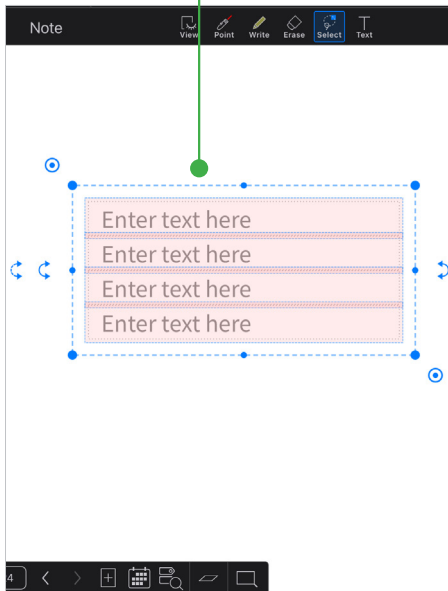
the file name will be displayed as default


To avoid unwanted changes, it is recommended to set a Password.

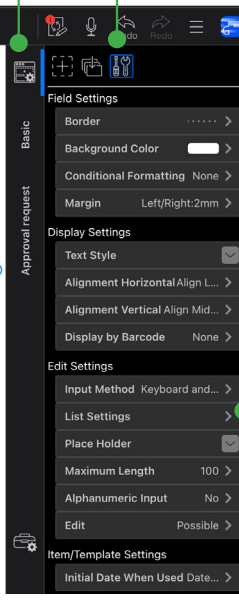
6-1-3 Customize the settings of a Shared List

The steps for using a Shared List in “Text-Input Field”/“Number Input Field”/“Selection Field” are all same. Thus it will be explained with only the “Text-Input Field” as an example

① Tap  then circle a Text-Input Field

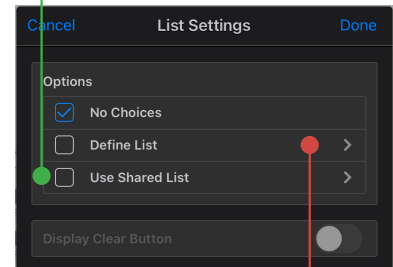


② Tap  >



③ Tap “List Settings”

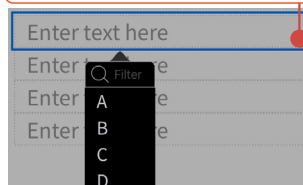
④ Tap “Use Shared List”



⑤ Select a List you want to use and tap “Done”

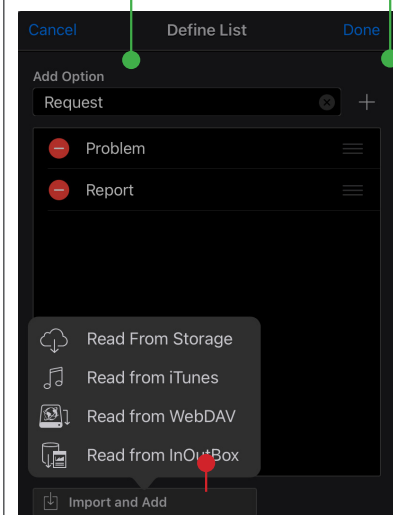


Now you can select options from the Shared List that you have selected earlier



Define List


Enter inputs in the box of “Add Option” then tap + to add as a list



You can add a new list with “Import and Add”

Filter with searching

You can filter options with words in the search bar

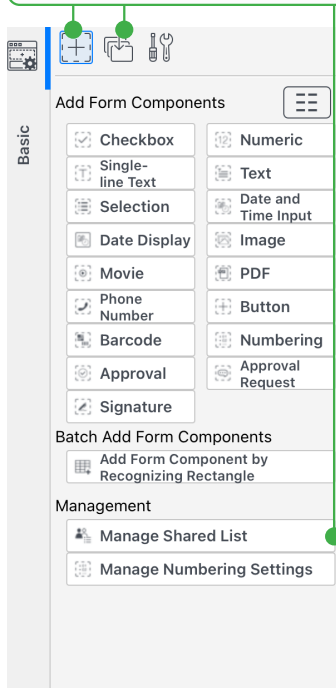
 The search bar appears when there are over 20 lists

6-1-4 Update a Shared List

The Shared Lists that were customized as form components get automatically updated when you update Shared Lists

Open a Note which has a Shared List that you want to update

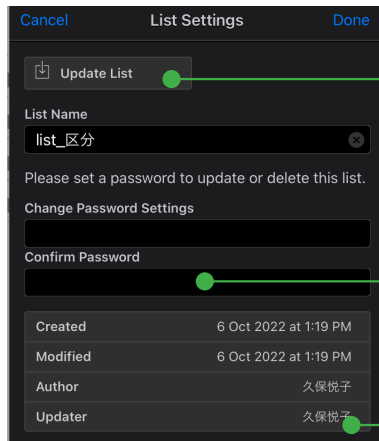
① Tap  >  > "Manage Shared List"



② Choose the Shared List that you wish to update

③ Enter password and tap "OK"

④ Tap "Update List" > select a file as the updated version of the Shared List



The Shared List will be updated

You can change passwords

You can check the details (which include the creator/updater) of the Shared List

⑤ Tap "Done"

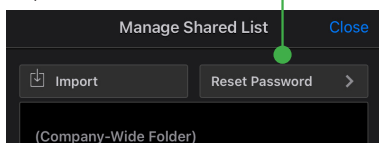
Choose a location from where you want to import a new Shared List

In case you forgotten a password for a Shared List

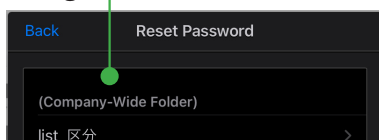
Only the Admin can change the password

1. Tap  >  > "Manage Shared List"

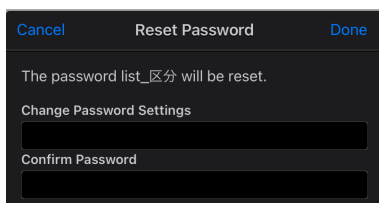
2. Tap "Reset Password"



3. Reset a password that you want to change



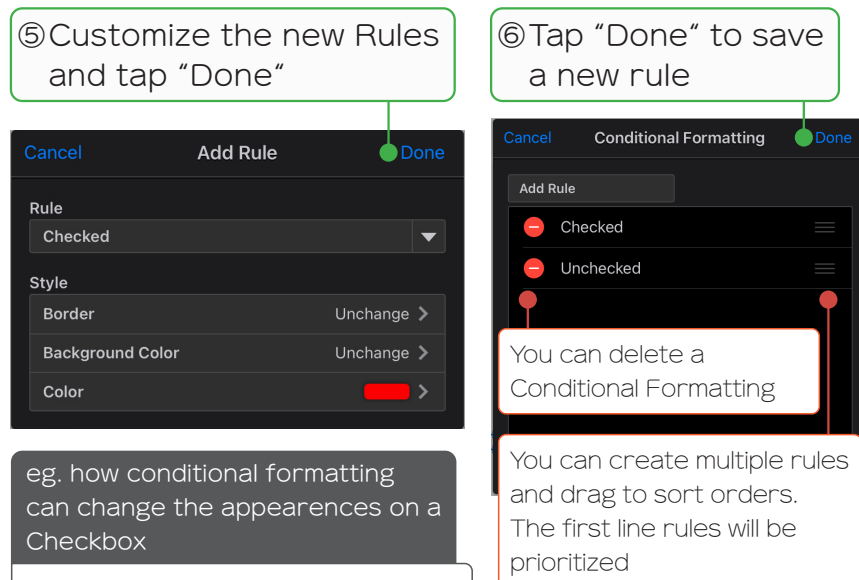
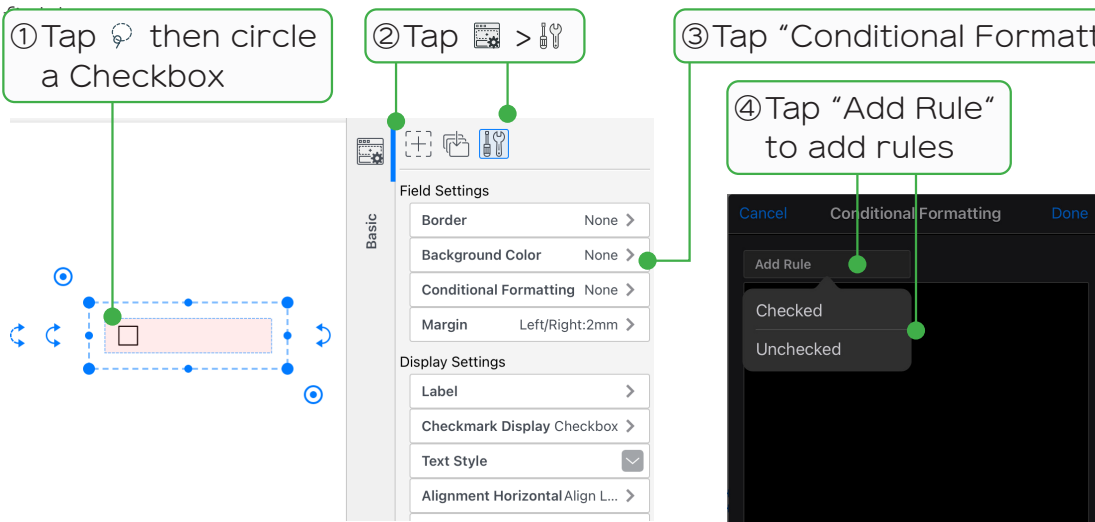
4. Enter a new password and tap "Done"



6-2 Add a new Conditional Formatting

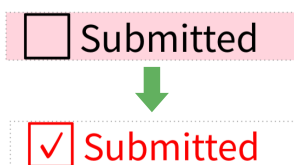
You can know how to add Conditional Formattings in a Checkbox

The steps are the same for the "Numbering Field"/"Text Input Field"/"Barcode Field"



eg. how conditional formatting can change the appearances on a Checkbox

- If Unchecked: Background Color is Pink
- If Checked: Color is Red



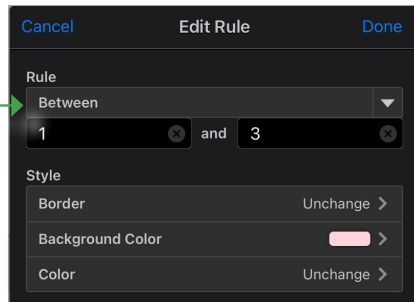
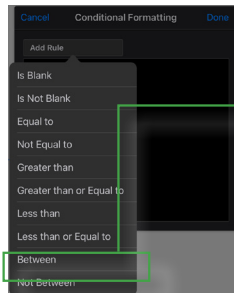
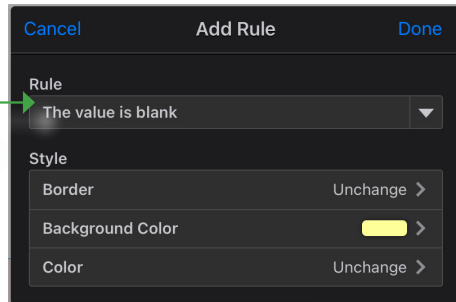
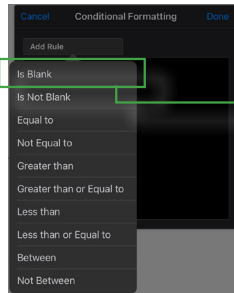
Number Input Field

eg. If a Number Input Field is empty: Background Color is Yellow
If the input number is from 1 to 3: the Background Color is Pink

Enter number here



2



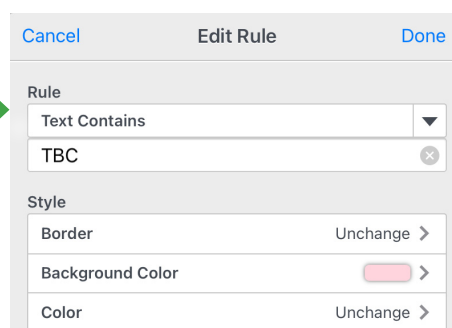
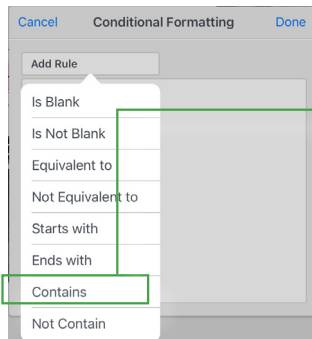
Text Input Field

eg. If the input texts are "TBC": the Background Color is Pink

Enter text here



TBC trash



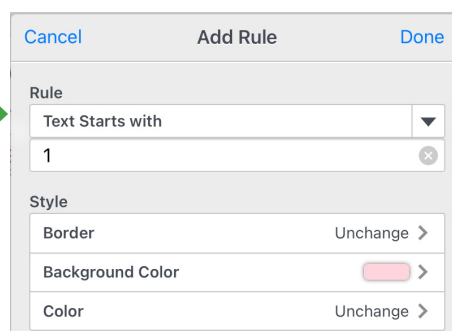
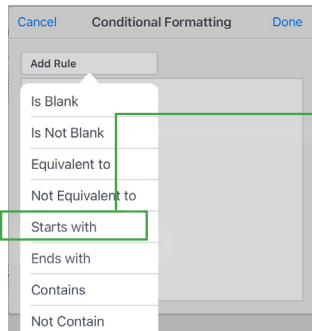
Barcode Field

eg. If it starts with "1": the Background Color is Pink

Tap to Read Barcode



12345670




7. What you can do with a Spreadsheet

The things you can do with a Spreadsheet are explained as follows:

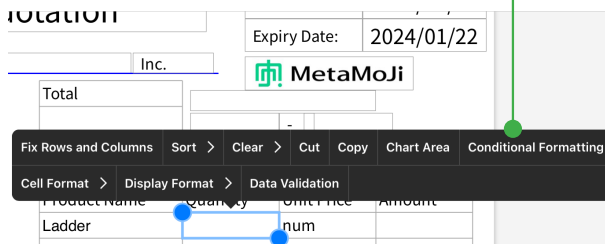
You can check the explanation in the User Manual with ≡ > "User Manual"

7-1 Add a new Conditional Formatting

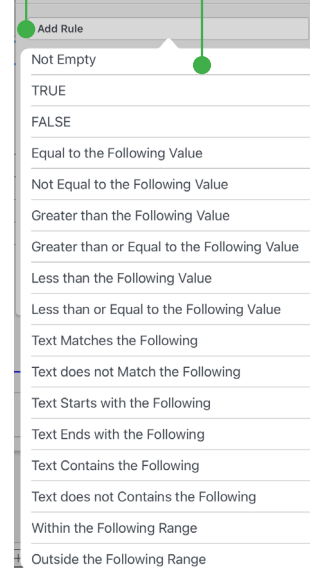
The following are the steps on how to add a new rule in a Spreadsheet

① Tap  then circle a Spreadsheet

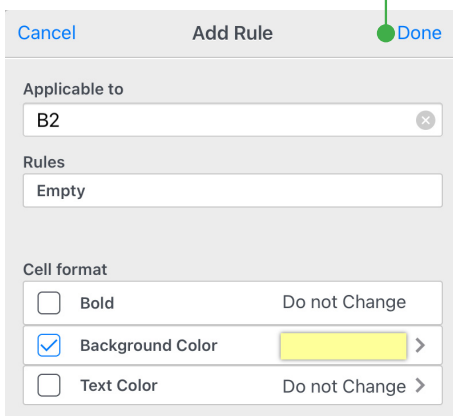
② Tap a cell > "Conditional Formatting"



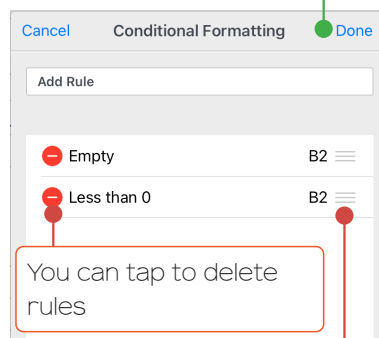
③ Tap "Add Rule" and select a rule



④ Tap "Done" after customizing a new rule

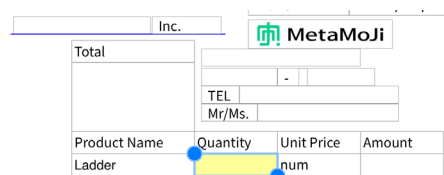


⑤ Tap "Done" after the new rule is shown in the list




You can tap to delete rules

You can also create multiple rules
You can drag to sort orders as the rules in the first lines are always prioritized

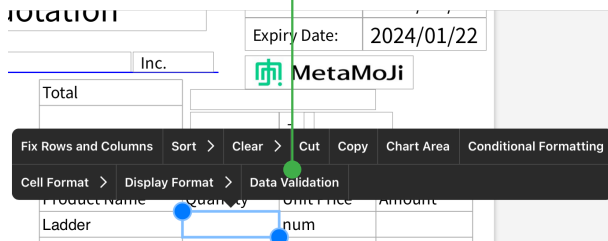


7-2 Adding Data Validation

You can set a Data Validation for users to input correct information

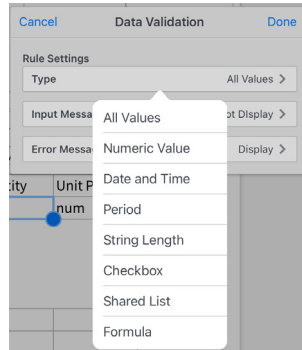
① Tap  then circle a Spreadsheet

② Tap a cell > "Data Validation"

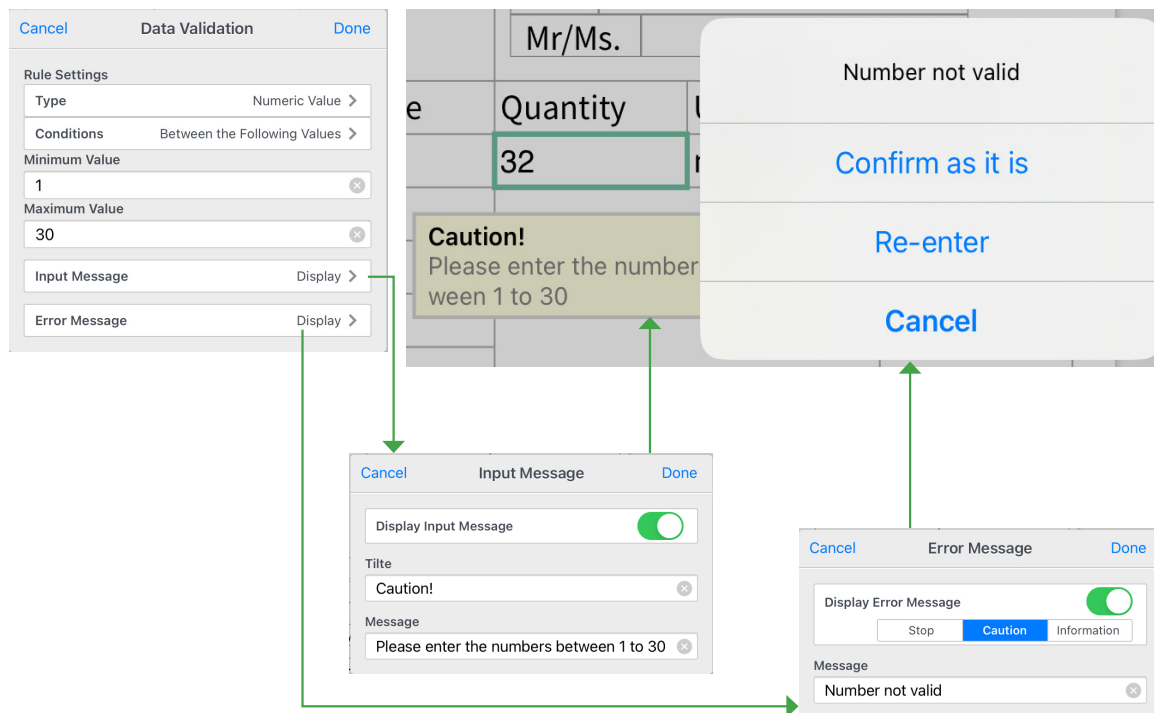


③ Customizing Data Validations

You can select and customize data validations from the following options: "Numeric Value"/"Date and Time"/"Period"/"String Length"/"Checkbox"/"Shared List"/"Formula"




This is an example of when you want users to input numbers starting from 1 to 30




7-3 Add a Chart

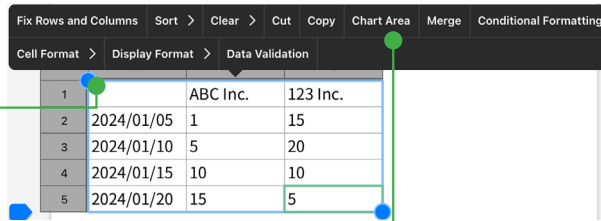
You can create a new chart from the Spreadsheet in GEMBA Note

i Please note that this function is available only in the iOS/Windows versions. You cannot create a chart in GEMBA Note in Android ver

① Tap  then circle a Spreadsheet

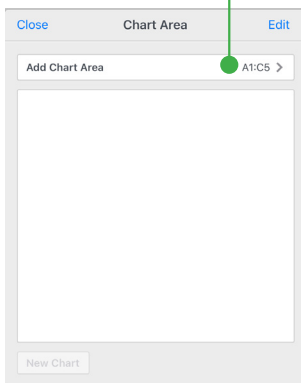
② Tap a cell> drag  to select cells that have data for a chart

③ Select "Chart Area"

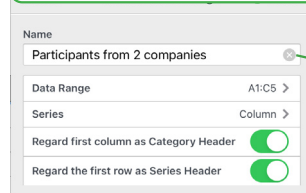


		ABC Inc.	123 Inc.
1			
2	2024/01/05	1	15
3	2024/01/10	5	20
4	2024/01/15	10	10
5	2024/01/20	15	5

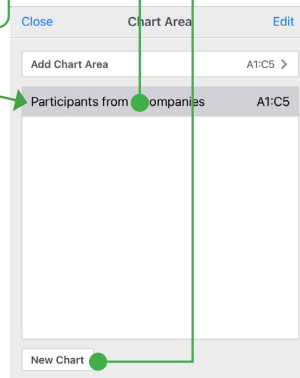
④ Tap "Add Chart Area"



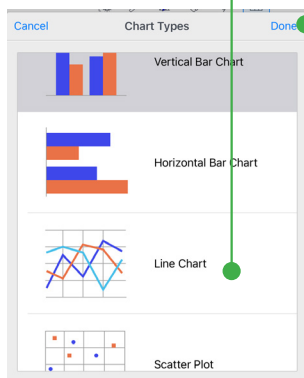
⑤ Tap "Done" after customizing the Chart Area Settings



⑥ Select an added Chart Area> tap "New Chart"



⑦ Select a Chart Type> tap "Done"

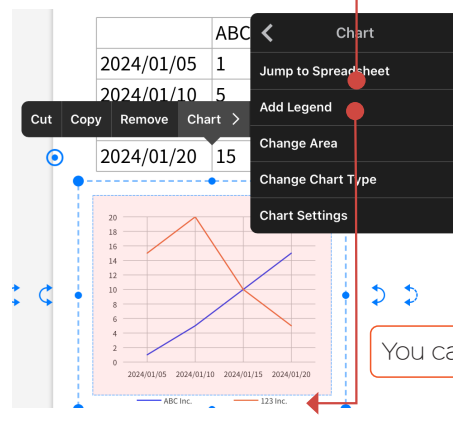


A new chart is created

How to check the details of a chart

Tap a chart> "Chart" to select options

You can jump to an original spreadsheet



You can add a legend