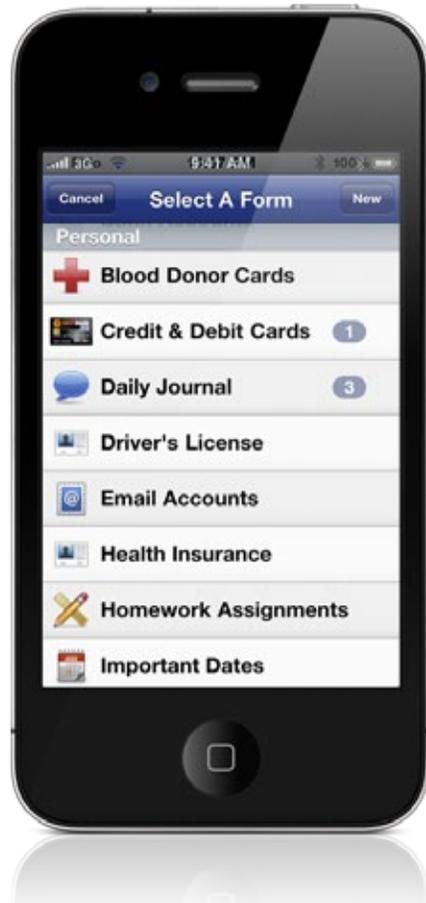




Mobile database software for iPhone®, iPod touch® and iPad™ devices

Organize your life with the most powerful iPhone® database app yet. Use Tap Forms to securely keep track of your movies, books, recipes, inventory and more.



YOUR LIFE: ORGANIZED.

www.tapforms.com | support@tapforms.com | Created By: Brendan Duddridge | twitter.com/brendand

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Introduction

Tap Forms is a Mobile Personal Information Manager tool for tracking all of your personal data and ideas. Tap Forms uses SQLite to store and manage all of your data in a safe and secure environment.

The use of custom data forms allows you to organize your data easily, for storing and recalling at any time.

Key Features

Safe and Secure – uses strong AES-256 bit encryption for encrypted fields

Get started quickly – over 25 forms ready to use

Easy to use – searching and data sorting built in

Favorites - keeps important data only a few taps away

Customizable – 17 field types, reordering of fields, custom field names

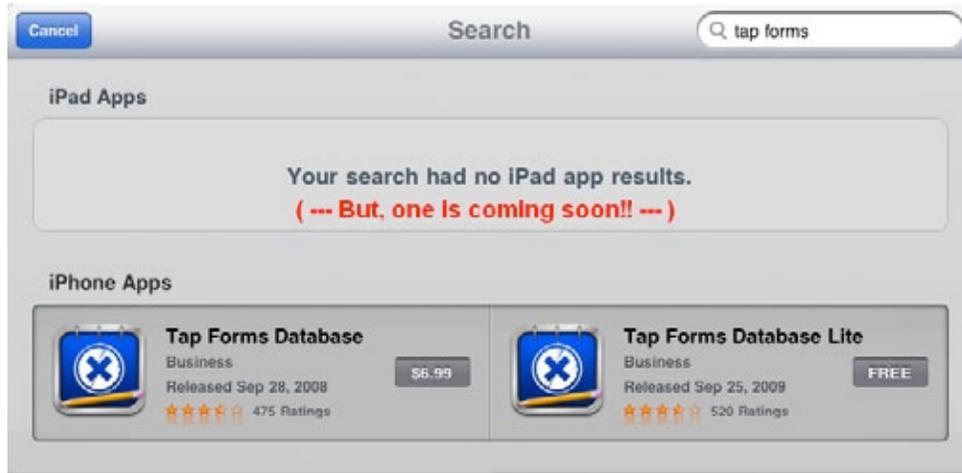
Powerful – relational linking, and customizable pick lists

Share – email a single record or a complete CSV data file

Import/Export – built-in FTP and Web servers, and Dropbox support

Installation

If you have not download Tap Forms yet, simply visit the App store and search for "Tap Forms". You will find two versions, the full iPhone version (which works on the iPad) and a "lite" version, which is a fully functioning version that you can use for evaluation, with the only limit being that it can hold only 15 records.



And yes, the full iPad version is almost ready to release, so look for it soon in the App store!

Once you see how powerful and useful Tap Forms is, you can easily download the full version and start creating your custom data forms!

If you are downloading the app within iTunes, don't forget to check "sync" and or "apply" to update and sync the app to your device.

Once installed you should see the app icon, which you can tap to start the app.

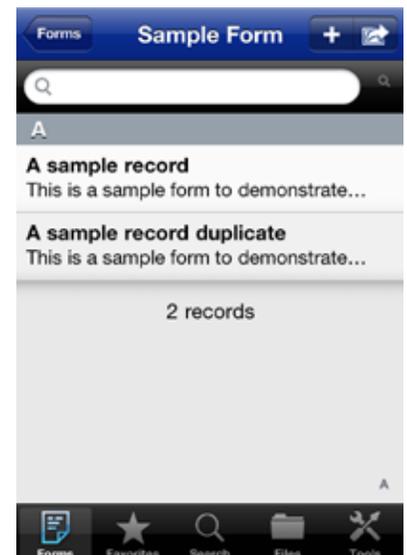


Operation

When you open Tap Forms, you are presented with a sample data form. Explore this sample data file to see some of the field types and get a feel for how to get around inside the app.

Toolbars

The following toolbar icons are used throughout the application. Simply tap these icons to perform the desired operation.



Navigation Bar



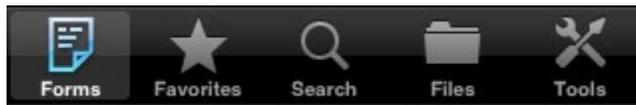
Back

title

Add Action

These buttons may change, depending on where you are in the app. The left side is normally for navigation, the center is the Title area, and the right side is for Actions. The button functions may include: Action, Add, Delete, Edit, Search, Save, Help, Done, and many more.

Tab Bar



The bottom tab bar buttons access the 5 main areas of Tap Forms.

Forms – access your list of active forms

Favorites – one tap access to your favorite records!

Search – search across all forms

Files – import, export, and Dropbox functions

Tools – app settings, security, customization, and font selections

These 5 areas will be discussed further in the following sections.

Using Tap Forms

Tap Forms is a fully customizable, easy to use database application. It leverages many of the iPhone's built in features, and has a similar look and feel as many of the common iPhone apps, such as photos, maps, contacts, browsers, etc. The beauty is that Tap Forms ties them all together using Forms as the main user interface!

Forms

Forms are the templates that are used to store all the data you need while you're on the go. They are easily customized to fit your lifestyle and needs.

Tap Forms ships with over 25 built-in forms, which you can use as is, duplicate and edit it as needed, or simply create your own new forms from scratch.

Forms have a few key features, along with your fields which contain your data.

Icon – to indicate the type of form

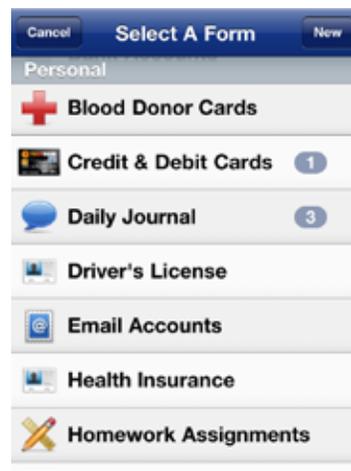
Title – what you see in the list of forms

Category – a grouping feature to help organize your forms

Sort & Group – a way to organize the data inside your forms

Hide Form – nice for Link to Field forms (more later)

Fields – your data!



Icons are used to indicate the type of form being used, or as a simple reminder for a specific type of data.

There are over 175 icons included to give your forms a unique identifier. See appendix. You can also choose a photo from your photo library or use the camera to take a photo to be used as an icon.

Each form has **Title** which serves as a way to help you identify the data stored in the form.

Your forms are divided into **Categories** for organization purposes. There are 4 categories by default, and you can easily edit or create new categories as needed. Tap the Tools icon and select Categories to modify or create new categories for your forms. You can also drag categories up and down to re-order them.

Sorting and **Grouping** allow for a way to arrange your data, such as; Group by city and sort by last name.

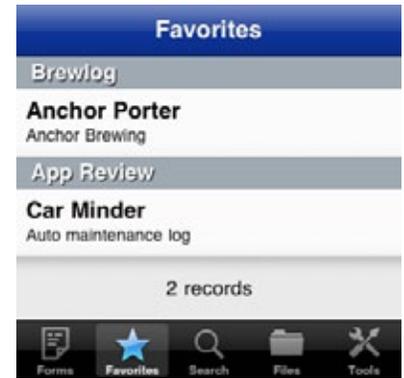
Hide Form is a way to remove forms from the main view, if not needed, i.e. for linked forms, where you do not want to see the child form.

Fields are customized containers used to store your specific data. There are 17 field types for various types of data, each with an easy to use data entry device, and specific tools, like mask field (for password fields). More on fields later!

Two other key areas of Tap Forms are the **Favorites** and **Search** functions described below.

Favorites

This is an area where quick access is desired. Tag any record as a favorite by tapping the star in the upper right corner, and it flags this record as a favorite.



It can be any number of records, from any number of forms. Then with one tap of the star on the bottom toolbar, you are presented with a list of your favorite records grouped by the forms they belong to!

Search

Search is another tool which allows you to find data easily and quickly.

Maybe you want to see all of your favorite wines from a specific winery. Search for their name and you will get a condensed list of those items for review.

Files

Importing and exporting is accomplished using the built in Web and FTP servers. Or by using Dropbox, you can get easy access to all your files stored in your Dropbox account. When you export your records, they are saved as a CSV file into the Exports folder. If you tap on a file listed in one of these folders, you will see a preview of your data. (More on specifics a little later)



Tools

The following Tools are accessed by tapping the Tools icon in the lower right corner. These tools control how Tap Forms operates.

The first section contains the About screen and a small set of app store recommendations provided by a local group of Calgary based iPhone app developers. General customization is done with the next three choices, listed below.

Customize Forms allows you to edit any of the built in forms, duplicate them (to save the originals), delete forms that are no longer needed, or create your own forms from scratch.

Edit Categories allows you to edit category names, create new ones or re-order existing categories, as needed.

Edit Pick Lists can help you save time by creating lists of commonly used terms or data. Any Text field can have a pick list associated with it. This saves you having to type the same words or phrases over and over.

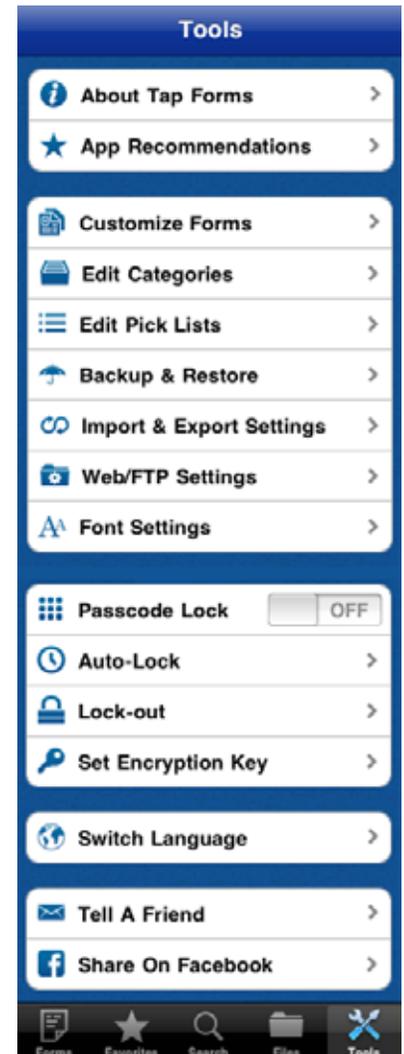
Backup and Restore - The next three choices are for backup and restore purposes, and handling of data files (to be discussed a little later).

Font Settings lets you select font styles and sizes used for displaying record lists, record detail screens, and the font used when editing Note fields.

Security – 2 levels of security will be covered later on.

Switch Language allows you to select your desired language. Tap Forms has been translated into 15 languages so far.

Lastly, if you like Tap Forms, tell others using the built-in Email and Facebook buttons.



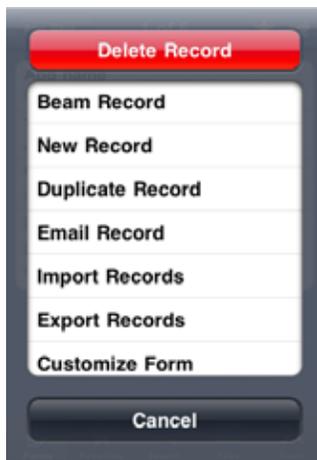
Backup and Restore

So, once you enter all this data, how do you protect it and save it to your desktop or laptop computer?

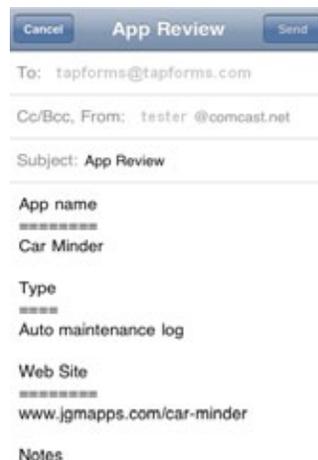
While the iTunes sync should back up your program and data, Tap Forms provides an alternate method using an open-source utility called SyncDocs. <http://syncdocs.sourceforge.net/>. SyncDocs provides an interface for transferring files between Tap Forms and your desktop computer. This allows you to save the actual TapForms_db.sqlite SQLite database file, audio recordings, and photos

Email Exporting

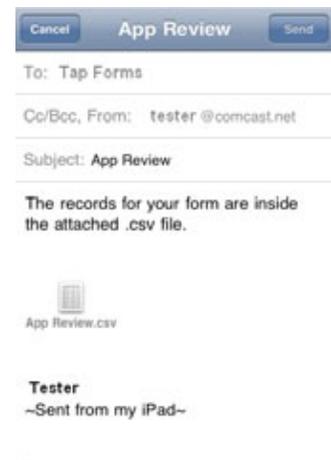
For general users, the simplest way to get data to the desktop (or other Tap Forms user) is to email records, individually or as a CSV file, which can then be opened with many software packages, such as Microsoft Excel. You can email a single record, which is embedded in an email message, or all the records for a single form as a CSV file attachment. Photos and audio-recordings are included in the single-record email, but not the CSV file email. Tap the Action button in the upper right corner to bring up the menu for sending the record or records.



Action Menu



Send single record



Send all records
(for one form)

If you want to send multiple files at the same time, you still need to do this “export” step for each form’s data, but then you can use the built in webserver to access multiple files all at once! See below.

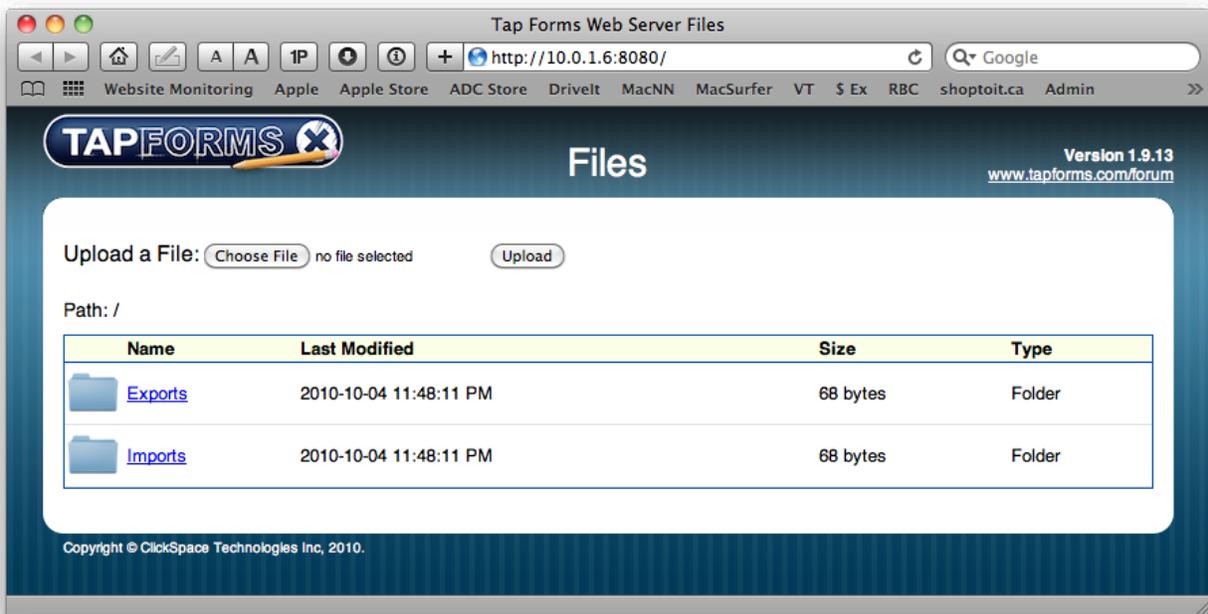
Webserver

From the Files tab, simply tap on the “power” icon button to activate the web server. A web address will appear, when on, using port 8080.

For files to show up they must be exported first. So from the desired form, tap the Action button and tap “Export Records” to put the CSV file in the Exports folder. See above.

From your desktop web browser, enter the address displayed by Tap Forms.

You should see the following screen which will allow you to copy files to your desktop, and upload files to be imported into Tap Forms.



Import files must be properly formatted, and the best way to ensure this is to create a few records and export them, then add your additional data, and then re-import as desired.

There is also an FTP server that can be used to transfer files to and from the desktop. You must switch to the FTP server from the Tools tab. Then on the Files tab, turn it on with the “power” button icon.



Visit our website for more tips on importing and exporting Tap Forms data files.

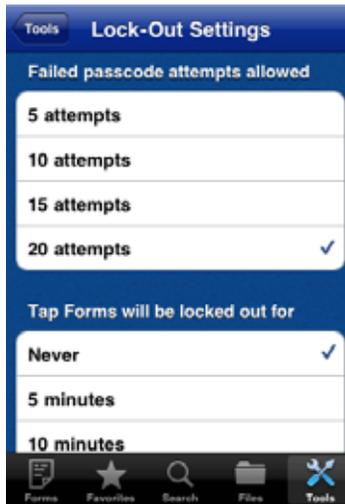
Security

One of the main things for a new user to decide on is the security level needed for your data. If you have a lock code on your iPhone or device, that may be all you need.

If you are going to store Bank Account info you might want the more robust security offered by Tap Forms. You can access these settings from the Tools menu.



Auto lockout timer



Stop repeated attempts



Up to 30 digit alphanumeric

Passcode Lock – is a typical 4 digit lock code, used by standard iPhone devices.

Auto-lock – allows for a method of locking Tap Forms if you leave your device unattended for a few minutes, if you don't already auto-lock your iPhone device. (good for mischievous co-workers!)

Lock-out – will delay potential hackers from repeatedly trying to guess your password.

Encryption Key – is a 30 character alphanumeric password which provides Strong AES-256 bit security.

CAUTION – you must remember this password!! Write it down and put it in a safe place!

If you have to delete and re-install Tap Forms you will lose your data if you forget your encryption key.

Forms

Understanding forms is a key part in making Tap Forms work for you. And luckily, it is very simple. A form is like a file folder, which can hold any sheets of paper. The sheets of paper are called records, and the data on the sheet, are the fields.

So for example, my car repairs would be filed in a single folder. And my insurance papers would have their own folder, and so forth. So decide what you want to track, and create or use existing forms that help you keep that data separated and organized.

Built-in Forms

- | | |
|----------------------------------|----------------------------|
| Passport information | Vehicle insurance |
| Security alarm codes | Government health number |
| Vehicle registration information | Frequent flyer numbers |
| Daily journal | Log book |
| Drivers license | School homework tracker |
| Credit card numbers | Investment account numbers |
| Loyalty card information | Garage door passcode |
| Bank accounts | Important dates |
| Memberships | Audio dictation |
| Software serial numbers | Locker combination |
| Online accounts access | Calling cards |
| Home insurance | |

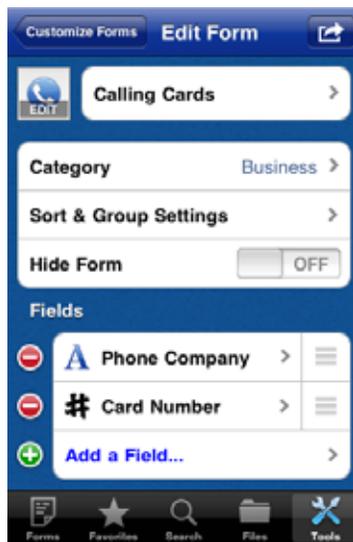
Select a Form

From the Forms tab, you tap the plus [+] button in the upper right corner to add a new form. You will see a list of all available forms to choose from grouped by Category and sorted alphabetically within each category. You can tap the form you wish to fill out, or you can tap New and start a new form from scratch.

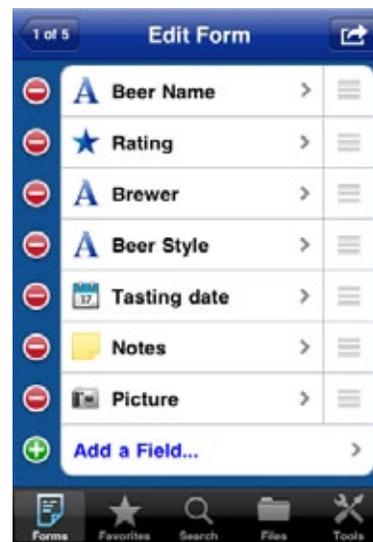


Editing Forms

From any form, you can tap the Action button in the upper right corner. On the action menu, choose Customize Form to edit the form, change the titles and the icon, or add, delete or change the field order.



- Change the Icon or Title
- Select a form Category
- Select Sort & Group Settings
- Hide the form on Forms tab
- Swipe up to see more fields



- Tap red "-" to enter the delete mode
- Grab right hand bars to re-order fields
- Tap on the field name to edit
- Tap green "+" to add a field

Once you save these edits, your form is updated, and the master forms list also maintains these changes. Any new forms created from scratch are also saved in the master forms list.

Caution

If you want to keep the original form unedited, open the form for customizing, then tap the Action button in the upper right corner. From the action menu tap **Duplicate Form** to save the original form unedited.

Fields

Fields are the lowest level of data stored in Tap Forms. For example, a single phone number is a field, while a contact, with phone number, address, email, and account data is a record (with multiple fields).

The beauty of Tap Forms is that you get to decide what data you want to track! The following fields are available to add to forms for tracking your data.

Included Fields

The last two fields listed have special functions. The **File Attachment** field allows you to link a field to a file in the Files tab area. The **Link to Form** field is for creating a “one-to-many” relationship between forms. A good example is a Trip Log form that links to a Hotel form, listing all the hotels you stayed at, or a Car Rental form, listing your various car rentals separately for each trip.

Text	Audio recording
Number	Website addresses
Date	Email address
Time	Phone number
Date & Time	Rating
Contact	GPS location with integrated map
Check mark	File Attachment
Note	Link to Form (one-to-many)
Photo	

Field Types

Text

Used for simple names and titles, typically one line of text.

Number

Various data formats for numbers, currency, percentage, etc.



Date

Set date using the Date picker or a Calendar picker, or tap Today To use today's date. Button in bottom middle changes pick mode.



Time

Set time using Time Picker or tap Now to use current time.

Date & Time

Date and Time picker combined to one line.

Contact

Select from your built in contacts data. Brings in the Name and Picture (if available)

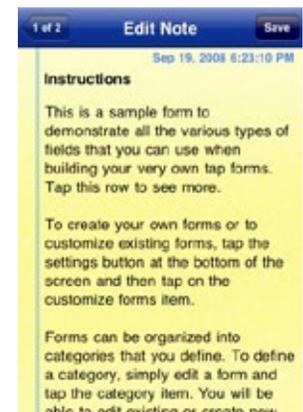
Check Mark

On/off check mark



Note

Long text field, like a memo, or built in Notes app.



Photo

Select from your saved photos or take a new photo.



Audio Recording

Record and play back audio messages.

Website Address

Website links with “mobile” icons (if available) with built in web browser.



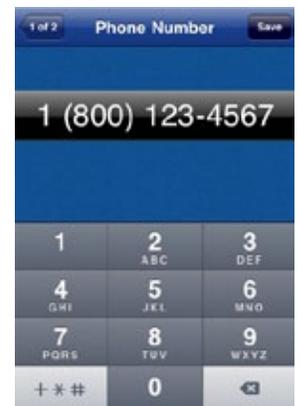
Email Address

Tapping an email address will address a new email message to the intended recipient right from within Tap Forms without leaving the app.



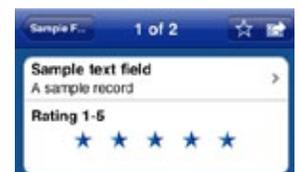
Phone Numbers

Enter directly, and dial the phone right from within Tap Forms.



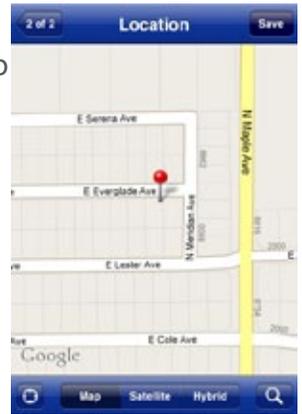
Rating

0 to 5 stars.



GPS location with Map

Pinpoint your current location or search for other locations. You can also drag and drop the pin around and Tap Forms will find the street address for you.



File Attachment

Connect to files. Nice for attaching PDF files to a record.

Link to Form

One-to-Many relationship building. This field links one form to another, as shown below.

Example – Brewery Form with beers from each brewery listed in the second form called Beer. So the individual Beers (3 in this case) are tied to the specific Brewery, via the linked form.

First record



Data in Beer field



Second record



Data in Beer field



In this example, the Beer form is marked as Hidden, so you don't see it from the main Forms list. To edit the form, drill down to a single record, and tap the Action button, in the upper right corner, then select Customize Form from the popup menu.

Or use Tools and Customize Forms to access and modify the hidden form.

Example #1 – Beer Tasting Log

Often we go through life tasting various foods and drinks. Wouldn't it be great to be able to jot down the vendor, brand or restaurant for that wonderful dish? For this example, we will create a Beer Tasting Log, which could easily be modified for a Wine Log or Food Log.

Decide on a Form name

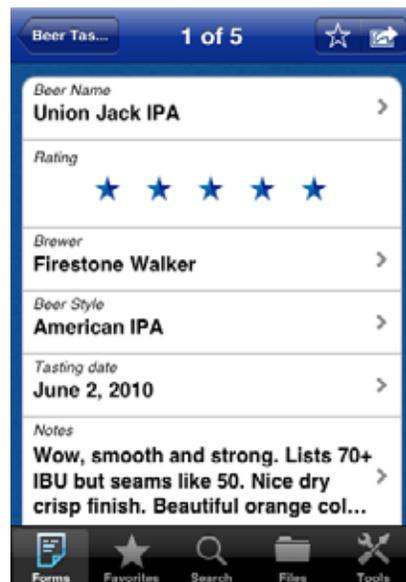
For this example we will use "Beer Tasting"

Decide on a Form Category

We will use Personal as our category.

Decide on fields to track

- | | |
|-----------------|------------------|
| 1. Beer Name | Text |
| 2. Rating | Rating |
| 3. Brewer | Text |
| 4. Beer Style | Text – Pick List |
| 5. Tasting Date | Date |
| 6. Notes | Note |
| 7. Picture | Photo |



The screenshot shows a mobile application interface for a 'Beer Tasting' form. The form is titled 'Beer Tasting' and is the first of five screens. It displays a data record for 'Union Jack IPA'. The fields are: Beer Name (Union Jack IPA), Rating (5 stars), Brewer (Firestone Walker), Beer Style (American IPA), Tasting date (June 2, 2010), and Notes (Wow, smooth and strong. Lists 70+ IBU but seems like 50. Nice dry crisp finish. Beautiful orange col...). The bottom navigation bar includes icons for Forms, Favorites, Search, Files, and Tools.

On the right is a sneak peak of our final form, displaying a data record, which should give us a good feel for what we are about to create!

Ask yourself, can Pick lists be used?

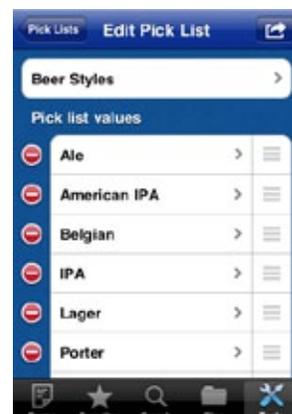
In our case, Yes for Beer Style. This will help organize our data, by providing for consistent data entry.

Decide on Sorting and Grouping

For our example we will want to Group on Beer Style and maybe Sort by Rating.

Create the Pick List

We will need this before we enter the fields, so let's do this first. From the Tools tab, select Edit Pick Lists, and tap the plus [+] button to start a new list. Call it "Beer Styles" and enter your desired values.



The screenshot shows a mobile application interface for 'Pick Lists' in 'Edit Pick List' mode. The list is titled 'Beer Styles' and contains the following items: Ale, American IPA, Belgian, IPA, Lager, and Porter. Each item has a minus sign on the left and a plus sign on the right. The bottom navigation bar includes icons for Forms, Favorites, Search, Files, and Tools.

Okay, you are now ready to create your Tap Forms database!

Create the Form

We will start from scratch, since there are no forms close to what we want. Tap the plus [+] icon in the upper right corner, then tap the New button to start a new form.

1. Select an Icon (or a photo)
2. Enter the title "Beer Tasting".
3. Select "Personal" as the category.
4. Skip the Sort & Group for now (we will do that later).
5. Leave Hide Form setting as off (default).
6. Enter the fields, listed above.

Tap the green plus [+] or "Add a Field..." row to create a new field.

For the Beer Style field, tap Field Options and in the Pick List setting, select the "Beer Styles" Pick List created above.



Re-order the fields as desired by dragging up and down, the 3 bars to the right of the field name. For this example we want to see the Beer Name and the Rating in our master list of records so they must be the first two fields. If you place a photo or a check mark field as the first field, Tap Forms will use the 2nd and 3rd fields for the list view and the photo or check mark will appear to the left of the next two fields. Check mark fields are live on the list view if they're the first field. This makes it easy to build a simple to-do style list.

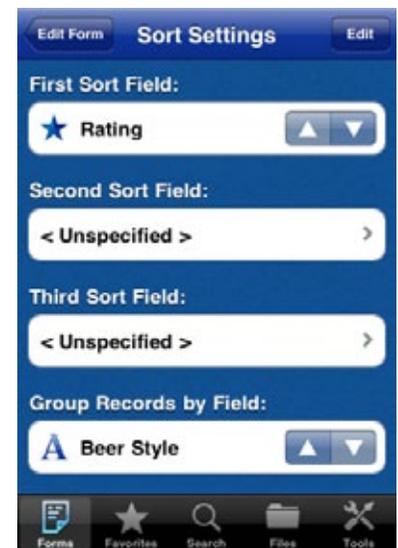
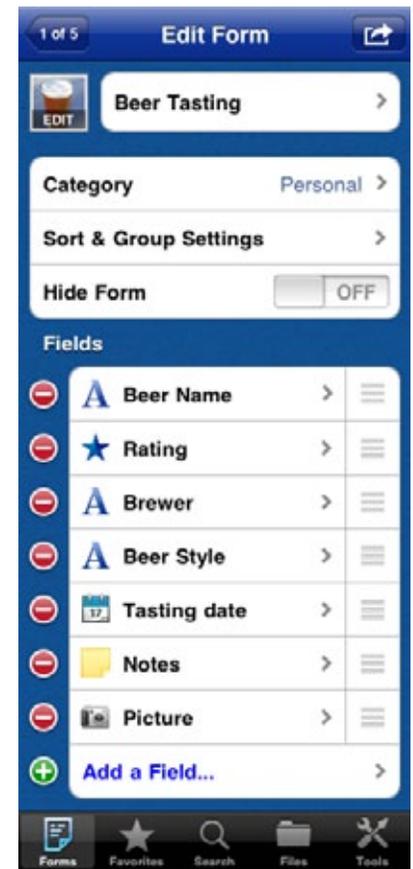
Decide on Sorting and Grouping

Once the fields are entered, we will want to group by Beer Style and sort by Rating.

And presto! We have our first Tap Forms database!

Test – enter a few records

After we have a few records, we can view our data and tweak the form as needed. As shown on the right, grouped by Style, and sorted by Rating

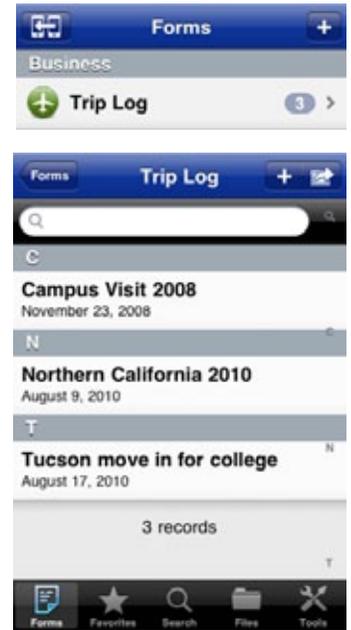


Example #2 - Trip Log

This example will demonstrate the **Link to Form** field type and the power of Tap Forms.

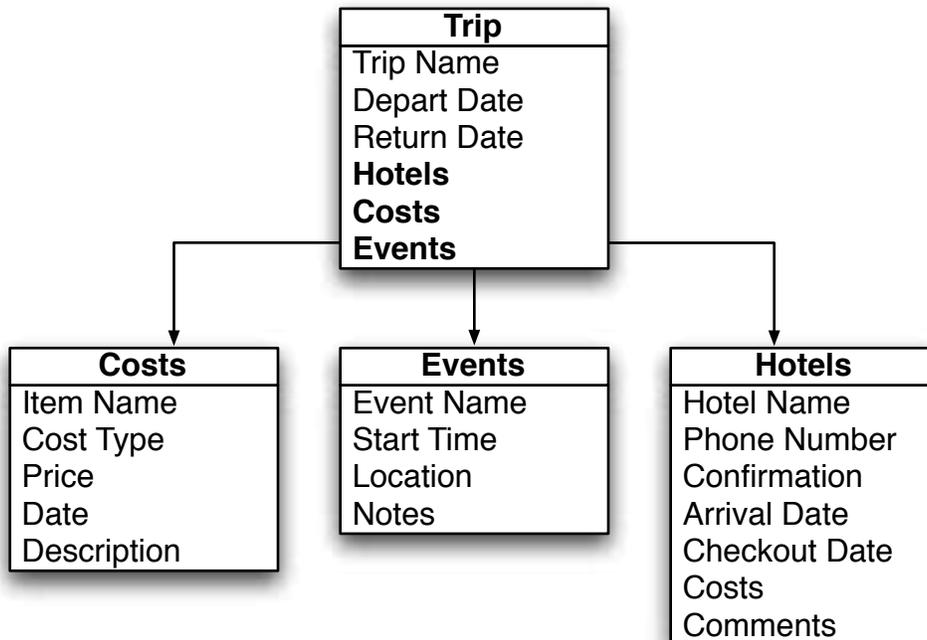
The goal for our Trip Log is to create a tool that a traveling sales person could use while on the road making sales calls. We want to document our trip, to help isolate costs and to help plan for future trips. For this example, we will track the following:

1. Hotels
2. Costs
3. Events



Since we want the individual hotels, events and costs tied to the master trip record, we will use the Link-to-Form field type and hide the related child forms, so we have a clean form list and tight data linking, for later use.

So let's define our fields for Trip Log.



We could benefit from using a pick list for Cost Type, so create a simple pick list, as before. From the Tools tab, tap Edit Pick Lists, and create a new pick list. We want to include item names like Food, Gas, Parking, Misc.

Now we can get started creating our forms. We want to create the (3) linked forms first, so that when we pick the Link-to-Form field type in our master form, we can pick the desired "linked" form.

We will call these forms Hotels, Costs, and Events respectively. Here is a sneak peak at our finished forms. For the main Trip Log form we have the following.

Hotels

Costs

Events (Meetings)

We have our Trip name, Depart and Return dates, and the (3) linked forms. Any linked form will contain their own icons, indicating the form type, and or data used. Here we have Hotels, Costs, and Events.

Tap any of the (3) linked forms and you will see the data listed above.

So, let's get started.

Create the Forms

We will start from scratch, since this is a custom solution. And, we will start with the linked forms first.

From the Tools tab, select Customize Forms. Tap the plus [+] icon in the upper right corner to start a new form.

1. Select an Icon (or a photo). We want a little house icon, or something similar.
2. Enter the title "Hotels".
3. Select "Business" as the category.
4. Skip the Sort & Group for now (we will do that later).
5. Change the Hide Form setting to on.
6. Enter the fields, listed as shown.

Tap the green plus [+] to enter a new field.

Order the fields as desired by dragging the bars to the right of the field you want to move. For this example we want to see the Hotel Name and the Phone No. in our master list of records so they must be the first two fields.

We can now go back and set the sort order. Select "Hotel Name" for the First Sort Field, since we now have the fields completed.

Easy right? NEXT FORM!!!

From the Tools tab, select Customize Forms. Tap the plus [+] icon in the upper right corner to start a new form.

1. Select an Icon (or a photo). We want a cost icon, or similar.
2. Enter the title "Costs".
3. Select "Business" as the category.
4. Skip the Sort & Group for now (we will do that later).
5. Change the Hide Form setting to on.
6. Enter the fields, listed as shown.

Tap the green plus [+] to enter a new field or tap the "Add a Field..." row.

Make sure you set the Cost Type field options to use our Cost Type pick list!

Order the fields as desired by dragging the bars to the right of the field you want to move. For this example we want to see the Item Name and the Cost Type in our master list of records so they must be the first two fields.

We can now go back and set the sort order, and select "Item Name" for the First Sort Field, since we now have the fields completed.

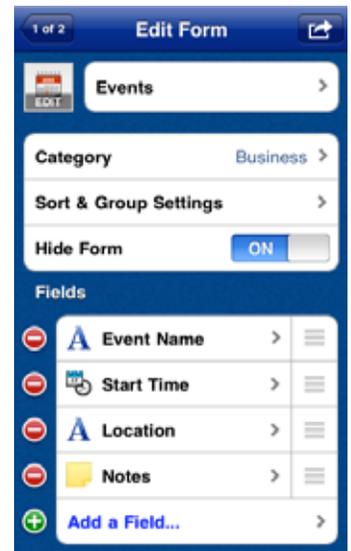
Last Linked Form

From the Tools menu, select Customize Forms. Tap the plus [+] icon in the upper right corner to start a new form.

1. Select an Icon (or a photo). We want a calendar icon.
2. Enter the title "Events".
3. Select "Business" as the category.
4. Skip the Sort & Group for now (we will do that later).
5. Change the Hide Form setting to on.
6. Enter the fields, listed as shown.

Tap the green plus [+] to enter a new field.

Order the fields as desired by dragging the bars to the right of the field you want to move. For this example we want to see the Event Name and the Start Time in our master list of records so they must be the first two fields.



We can now go back and set the sort order, and select "Start Time" for the First Sort Field, since we now have the fields completed.

On to the Main Form

So now that we have our (3) "Link-to" forms, we can create our main form.

From the Tools menu, select Customize Forms. Tap the plus [+] icon in the upper right corner to start a new form.

1. Select an Icon (or a photo). We want a travel icon.
2. Enter the title "Trip Log".
3. Select "Business" as the category.
4. Skip the Sort & Group for now (we will do that later).
5. Leave the Hide Form setting to off (default).
6. Enter the fields, listed as shown.

Tap the green plus [+] to enter a new field.

You will have (3) regular fields, Trip name, Depart date, and Return date and (3) "link-to-form" fields, Hotels, Costs, and Events. When you tap on these fields, you can set the field properties, and tap "Link To Form" to select which form the field is linked to.



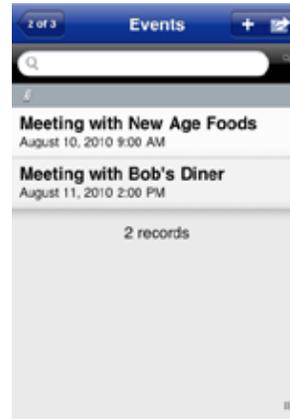
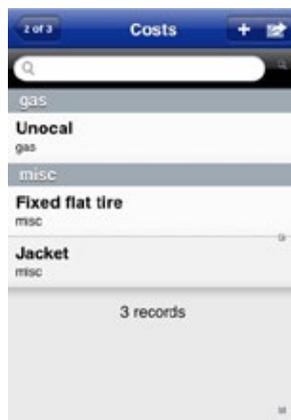
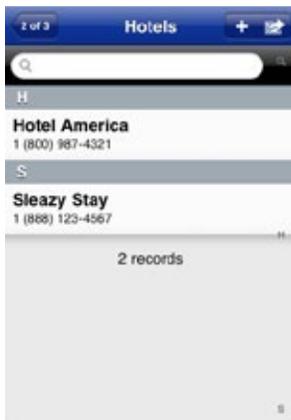
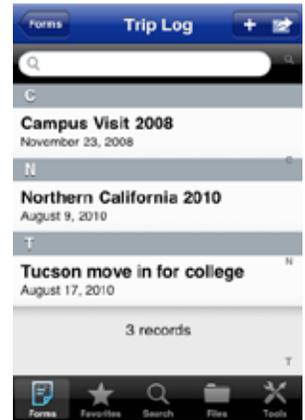
Order the fields as desired by dragging the bars to the right of the field you want to move. For this example we want to see the Trip Name and the Depart Date in our master list of records so they must be the first two fields. And finally we can select Sort and Group and select "by Trip Name" to finish our main form.

Not to bad! So enter a few records, and your data should look like the following:

Trip record showing:

- (2) Hotel items
- (3) Cost items
- (2) Event items

Tap these (3) to see data below.



Tips on Using Tap Forms

To Improve Your Time and Data Management

Use Tap Forms Often

Once you get familiar with Tap Forms you will want to use it daily! We are being bombarded with digital data these days, and Tap Forms will keep you from drowning in that sea of data.

Use the Built-in Form Templates

Use the built-in forms to speed up your prep time. Use the Customize Forms area under the Tools tab to duplicate a form, delete unused fields and add a few more. Then go to the Forms tab and tap the plus [+] button at the upper-right of the screen to select a form for which you would like to start entering your data.

Use Filtering and Sorting

Use the filtering and sorting to make it easier to find your data. Keeping your data condensed and grouped properly. This helps you to keep your search time to a minimum and makes you more productive.

Customize your Data Files

Everyone is different. Spend a few minutes to scribble down what works for you. Most likely, there is a way for Tap Forms to help you! If you get stuck, visit the website forum for answers.

Recommend Features

As you will see, Tap Forms is very powerful, and has been well thought out. But, if you have a good idea, submit it to the developer, and Tap Forms will get even better!!

Additional Help

For general info, you can find us at <http://www.tapforms.com>

For support issues, comments, or questions please email support@tapforms.com

Or visit our forum at <http://www.tapforms.com/forum/>

And you can also follow us on Twitter: <http://twitter.com/brendand>

Thanks for using Tap Forms and Happy Tapping!

Appendix

Icon Set



Sample Forms

Passport information
Security alarm codes
Vehicle registration information
Daily journal
Drivers license
Credit card numbers
Loyalty card information
Bank accounts
Memberships
Software serial numbers
Online accounts access
Home insurance

Vehicle insurance
Government health number
Frequent flyer numbers
Log book
School homework tracker
Investment account numbers
Garage door passcode
Important dates
Audio dictation
Locker combination
Calling cards

Field Types

Text
Numbers
Dates
Time
Date & Time
Contacts
Check marks
Notes
Photos

Audio Recordings (voice memos)
Website addresses
Email addresses
Phone numbers
Ratings
GPS location with integrated map
File Attachments
Link to Form (one-to-many)