Tap Forms Mac

Manual

2.0 — Last update: May 14, 2014

Tap Zapp Software Inc.

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Introduction

Tap Forms is a very powerful organizational tool designed to help you keep track of all your life's most important information at home, at work, or on the go. With built-in support for iCloud, now you can keep all your Tap Forms data on your iPhone and iPad in sync with your Mac. So when you're out and about and you need to lookup some important piece of information, you can be confident to know that you'll have it right there with you.

Forms, Fields and Records —>

Forms, Fields and Records

A Tap Forms database contains Forms, Fields, and Records.

A Form is simply a template which contains a collection of fields that describe the data you wish to capture and print.

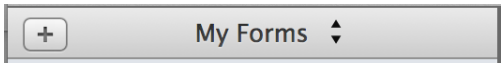
A Record is an instance of a Form which contains the actual data values that you are recording.

Tap Forms contains 27 built-in forms ready for you to use and customize. You can even delete them if you don’t wish to keep them in your database. You can also create new forms from scratch which you customize to capture exactly the kinds of data you want to keep track of.

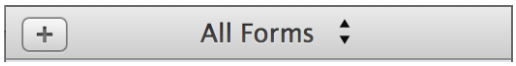
— Introduction | Using the Built-in Forms —>

Using the Built-in Forms

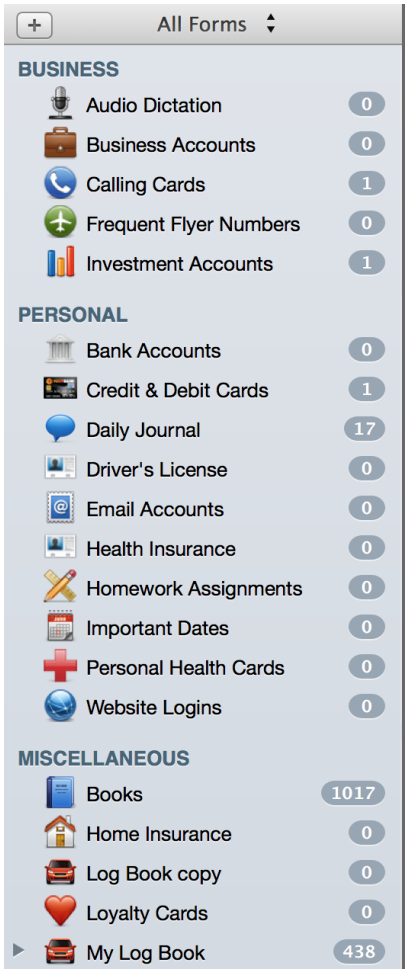
1. Click on the My Forms popup button and switch from the My Forms item:



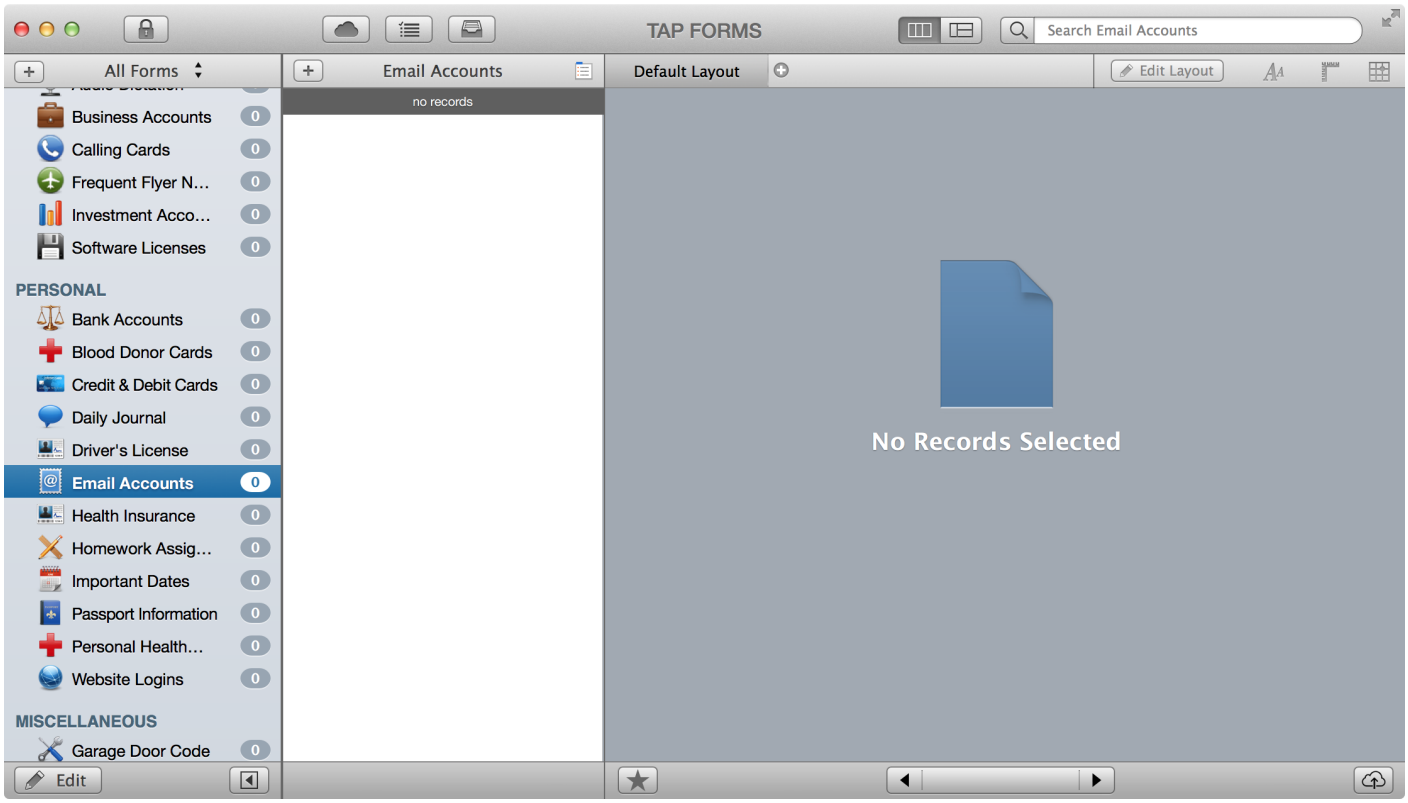
to the All Forms item:



You should now see a list of all the built-in forms that are available to you. You may need to expand the categories to display the list of forms beneath each category heading. Note that if this is the first time you're using Tap Forms, most of your forms will have 0 records in them.

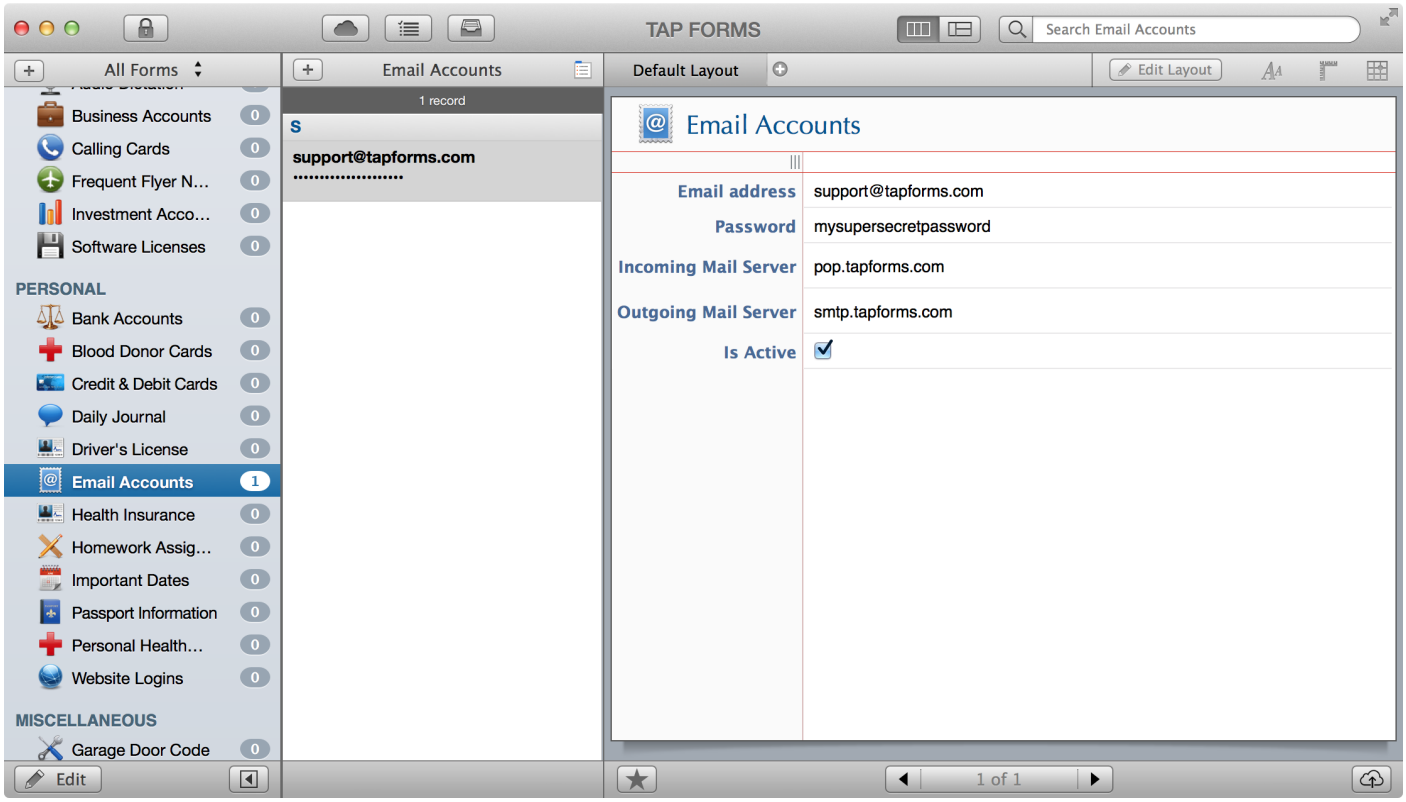


2. Click on a form to select it.



There are currently no records in the selected form.

3. Click the + button next to the form name in the second column to add a new record to your selected form.



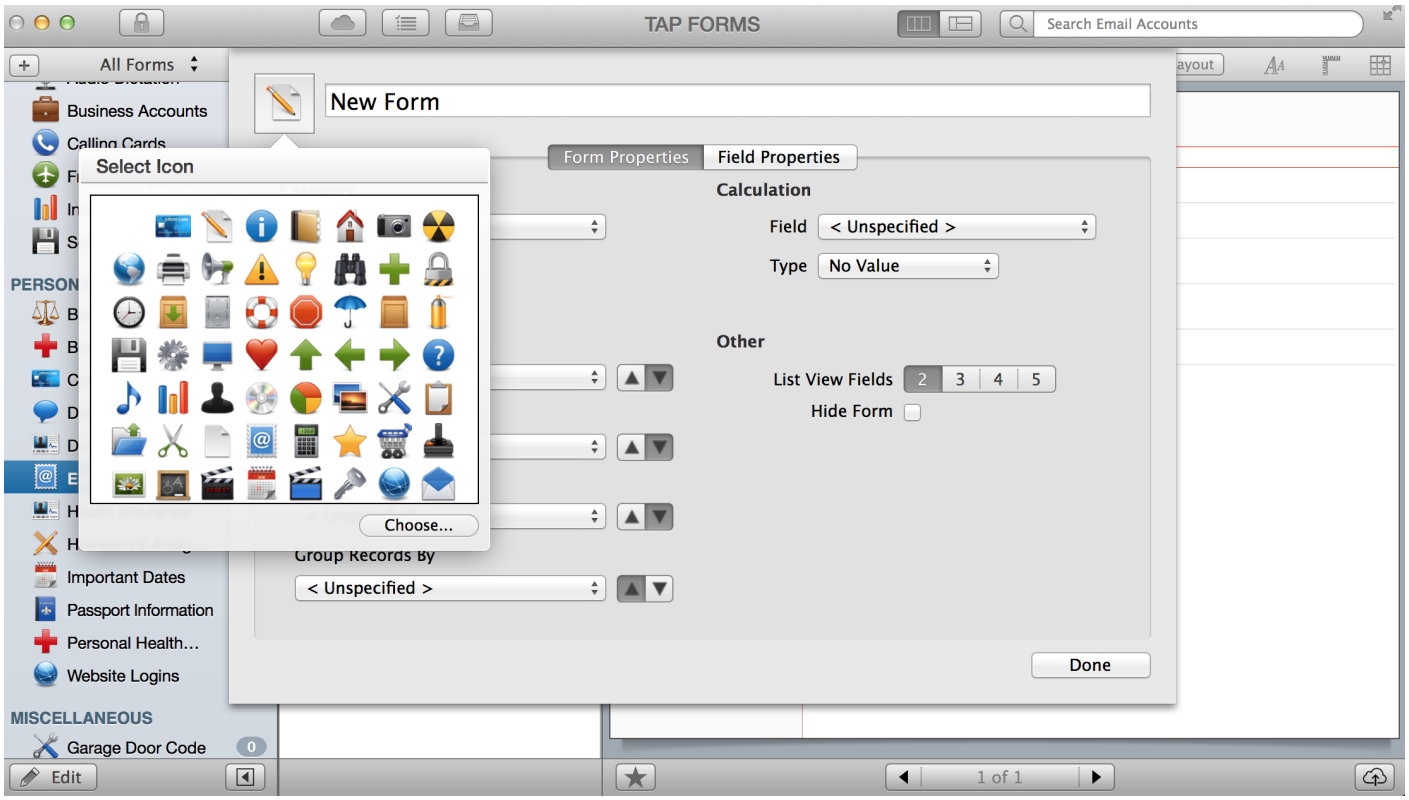
Fill in all the fields in your new record.

— Forms, Fields and Records | Creating a New Form —>

Creating a New Form

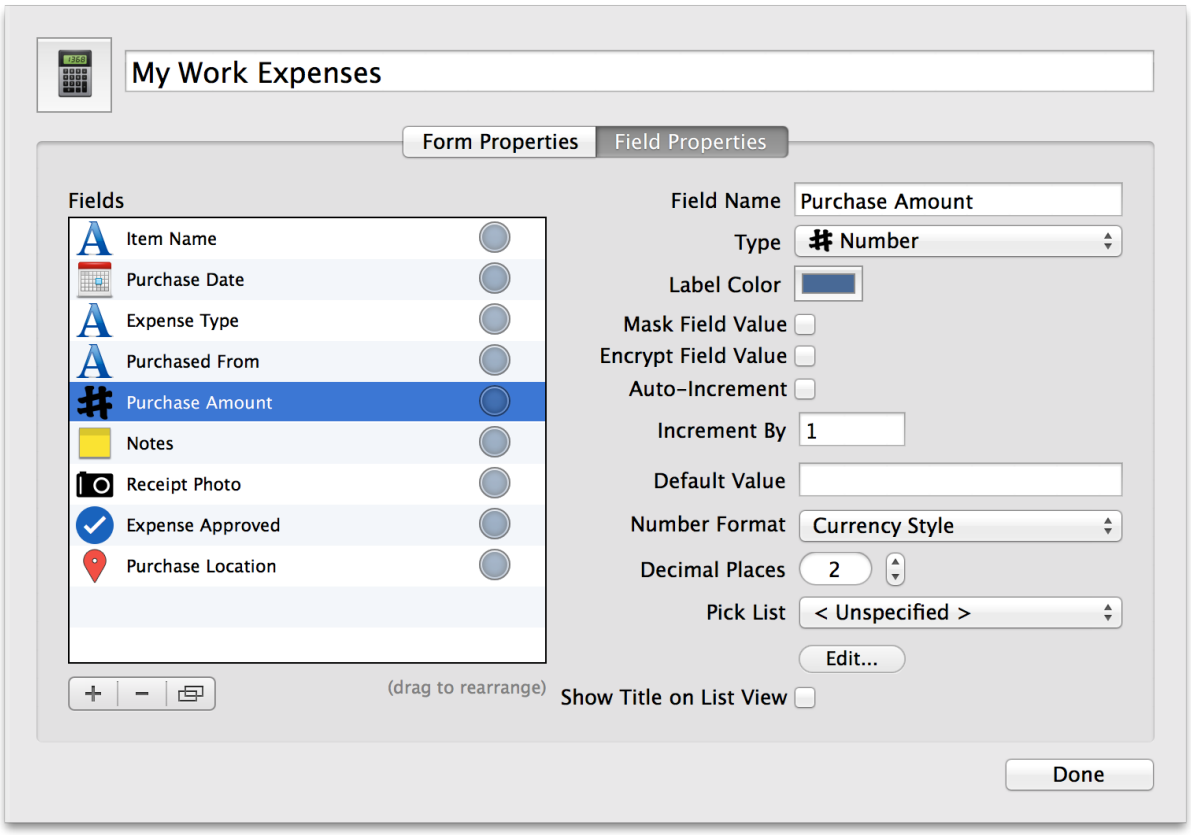
1. Click the + button at the top-left of the window.

A new form sheet will display where you can give your new form a name and select an icon as well as set other properties of your form.



2. Click the Field Properties tab and add some fields by clicking the + button below the fields list.

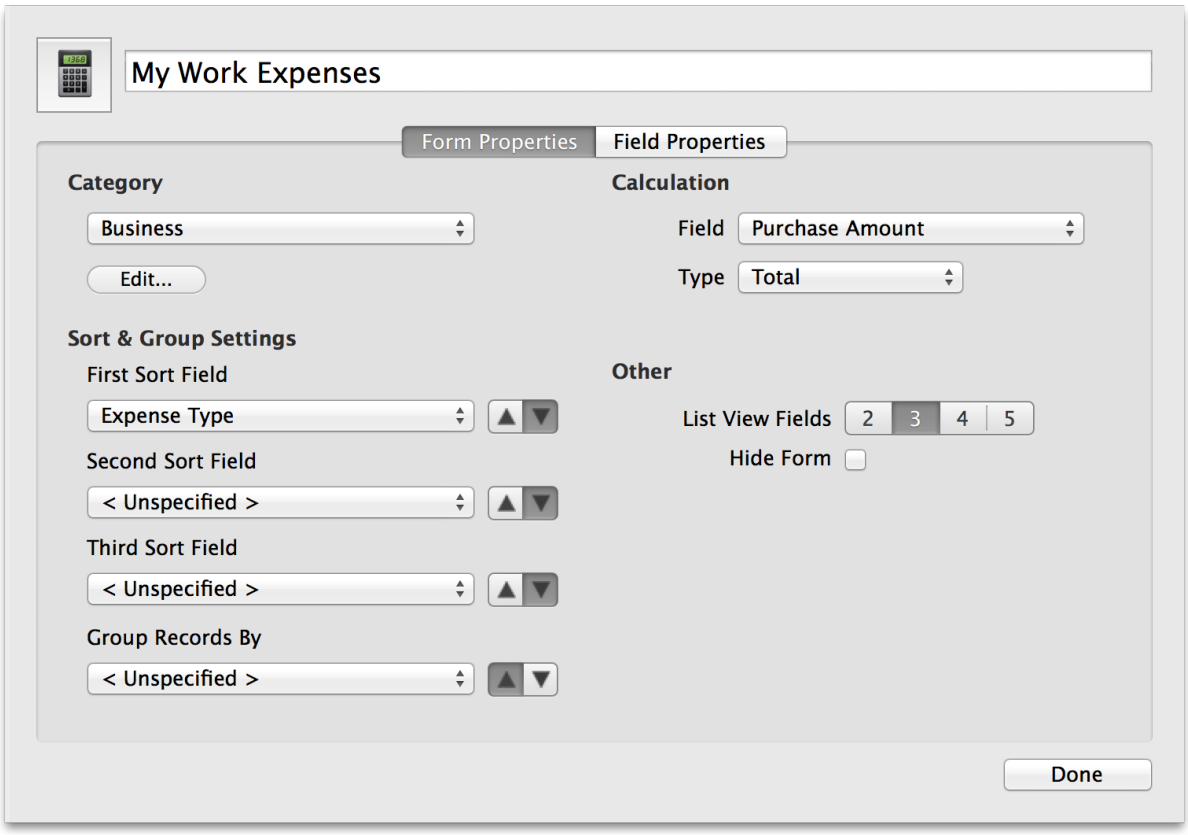
As you add new fields, Tap Forms will display the properties inspector for each field type you add on the right. Here you can set different field properties such as the field name, field type, number formatter, decimal places, default value, etc. Each field type has its own unique set of properties you can change. On this screen you can also rearrange the order of fields by dragging them up and down. By rearranging the order of fields, Tap Forms will display them in whatever order you've set on the Default Layout and on the Multi-column List View. You can also delete fields by clicking the delete button next to the add field button. There is also a duplicate field button which will duplicate the selected field.



If you drag a Photo field to the first position in your form, Tap Forms will display the thumbnail of the photo to the left of the next set of fields. You can control the size of the thumbnail on the Photo properties view.

3. Click the Form Properties tab.

You can set a variety of form level properties such as the Category your form will be located in, what the First Sort Field, Second Sort Field, Third Sort Field, and Group Records By fields will be. You can choose the sort direction too by clicking on the up or down arrows next to the sort field popup buttons.



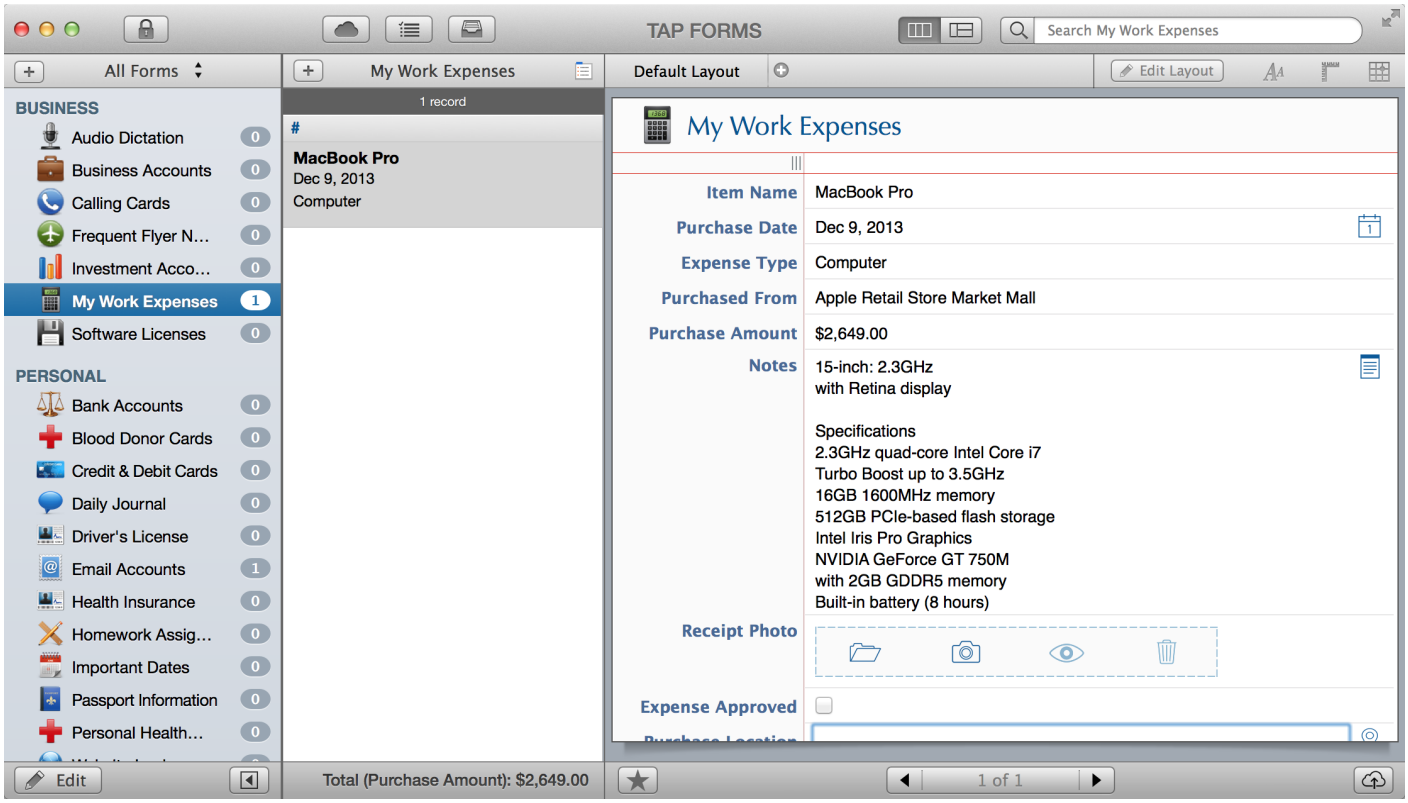
Calculation

If you have any Number, Rating, Checkmark, or Calculation fields in your form, you can use the Calculation Field and Calculation Type to tell Tap Forms to compute the total, minimum, maximum, or average of the field that you selected. The results will be displayed at the bottom of the records list.

List View Fields is used to tell Tap Forms how many fields to display on the records list view. You can tell Tap Forms to display the first 2, 3, 4, or 5 fields on the records list view.

4. Click the Done button when you're finished customizing your form.

Tap Forms will now create an empty record for you which you can then fill in to add your information.



Continue adding as many records as you like.

— Using the Built-in Forms | Field Types —>

Field Types

Tap Forms has 20 different field types. Each field type has its own set of properties that can be set in order to customize the way Tap Forms displays and edits your data.

The following table describes all the field types available in Tap Forms.

Icon	Field Type	Description
	Text	Text fields store small amounts of text. Normally a single line's worth. For example, a Movie Title.
	Number	Number fields display numeric data. They can be configured to format the display as currency, decimals, percentages, scientific notation, spell out (e.g. "twenty four ninety nine"), or as a duration (e.g. "10 hrs, 3 mins" or "10:03").
	Date	Date fields will display the month, day, and year. The display format used depends on your Region Format settings in the System Preferences. In general, Tap Forms uses the Medium date format to display dates.
	Time	Time fields will display the hours and minutes and AM or PM. This also depends on your region settings. If you have 24 hour mode enabled then you won't see AM or PM. Tap Forms uses the Short time format to display times.
	Date & Time	Date & Time fields are a combination of the Date and the Time fields displayed in a single field. The Date part will use the Medium date format. The Time part will use the Short format. By adding a Date & Time field to your form, you can also enable the Alerts function in Tap Forms. With the Alert function you can tell Tap Forms to notify you at the specified date and time. You can also include a short note which will be displayed along with the notification. Alerts can be scheduled to repeat at a variety of frequencies. These options are available when you're editing a date value in your record.
	Date Created	Tap Forms keeps track of the date a record was created. The Date Created field type will expose this field to your forms. You can sort by this field or filter your records by this field.
	Date Modified	Tap Forms also keeps track of the date and time a record was modified. You can sort by this field or filter your records by this field. Please note however that if you change the sorting of your form after your form is created, Tap Forms will update the Date Modified value for each record to be the current date and time. So it's best to set it once and leave it.
	Audio Recording	Tap Forms for Mac can play back audio recordings made on Tap Forms for iOS, but it cannot record audio notes on its own. When you sync with iCloud, Tap Forms for Mac will gain access to the audio notes you created on iOS.
	Calculation	The Calculation field type lets you construct formulas to compute mathematical expressions. Formulas can contain references to other fields within your form. You can use all the basic mathematical operators such as ( ) * / – + as well as the keyword $now. The $now keyword will insert the current time into the formula before being evaluated.

	Checkmark	The Checkmark field lets you have a basic on/off switch for setting whether something is true or false, on or off, yes or no, etc. Checkmark fields can be used in formulas also. For example, if you wanted the total to be computed only when a checkmark field is on, just drag the checkmark field into your formula and use multiplication to cause the result to be either 0 if it's off or whatever the regular result would be if the checkmark field value is on.
	Contact	The Contact field lets you reference a contact from your Mac's Contacts database. Tap Forms will copy the first and last names into its database as well as the Contact's unique identifier. This information will be used to look up the contact's record from the Contacts database whenever you click on the contact button to the right of the field. **Note:** due to the way Apple syncs contacts across devices, the unique identifier could get changed between devices. This can cause Tap Forms to display the wrong contact when you click on the contact button to the right of the field.
	Drawing	The Drawing field type on Mac is a read-only field. You can create drawings on iOS and view them on the Mac version. You cannot draw into a field on the Mac version.
	Email	The Email field will give you a button to the right of the field which will launch Mail whenever clicked and pass the email address entered into the field into the To: field of a new email message. Separate email addresses with commas to address more than one email address at a time.
	File Attachment	The File Attachment field will let you store one or more files associated with your record. You can tell Tap Forms if your File Attachment field supports just one file or multiple files by checking the **Multi-File Enabled** checkbox on the Field Properties screen. When Multi-File Enabled is checked, you will see a list of files within your File Attachment field. You can double-click on a file to launch the app which is responsible for that field type. You can also choose to attach your file as a copy of the file or as an alias of the file. When you attach a copy, Tap Forms will copy the file selected into its Attachments folder. The Attachments folder is synchronized using iCloud to your other devices. So you will be able to access the same files on your iOS devices and other Macs that are all using the same iCloud account. Aliases cannot be viewed on other devices.
	Link to Form	This field lets you connect different forms together. Use **One to Many** if you don't want or need to share the records from the linked form with other forms or records. Use **Many to Many** if you'd like to be able to select from a list of previously entered records from another form and link them to the parent record.
	Location	The Location field type will display to you a map of your current location. You can search for different locations and drag the pin around to change your location. You can also edit the location name, but Tap Forms will first do an address lookup to fill in the address that matches your current location.
	Note	The Note field type allows you to enter in large amounts of text. Text can also be styled using different fonts, sizes, and colours. The Mac version has the ability to add bulleted lists, but these are not displayed on the iOS version of Tap Forms.
	Phone	The Phone field will convert a set of digits into a formatted phone number taking into consideration different region formats for phone numbers. The iPhone version will also dial or text the number when the phone button is tapped.
	Photo	The Photo field will let you select a photo from your hard drive or use the built-in camera to take a photo. You can also drag and drop an image into the Photo field from your hard

		drive. Once a photo has been attached to your Photo field, you can click on the QuickLook button to view a larger version of the photo or click the trash can button to delete it.
	Rating	The Rating field will display up to 10 stars that you can click on in order to rate your records. For example, if you were maintaining a movie library you could add the film's popularity rating to your record. Ratings can be used in calculations and also at the form level. So you could display the average rating for all the movies in your library.
	Section Heading	The Section Heading field will help you to organize the fields within your form into sections. This makes working with long forms much easier.
	Website	The Website field lets you store an address to a website or even another application on your own computer. When you click on the website button to the right of the field, Tap Forms will launch your web browser and take you to the address specified.

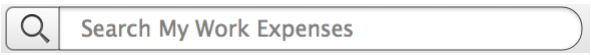
— Creating a New Form | Searching —>

Searching

Tap Forms can perform two kinds of searches.

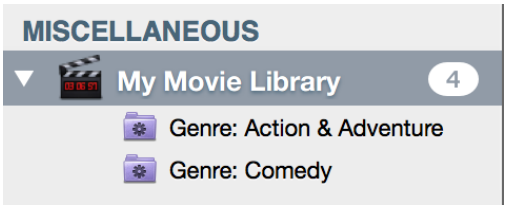
1. Search across all text and number fields in a form by using a simple search term.
2. Create one or more search rules which target specific fields for searching.

For basic searches, just enter a search term into the Search field:

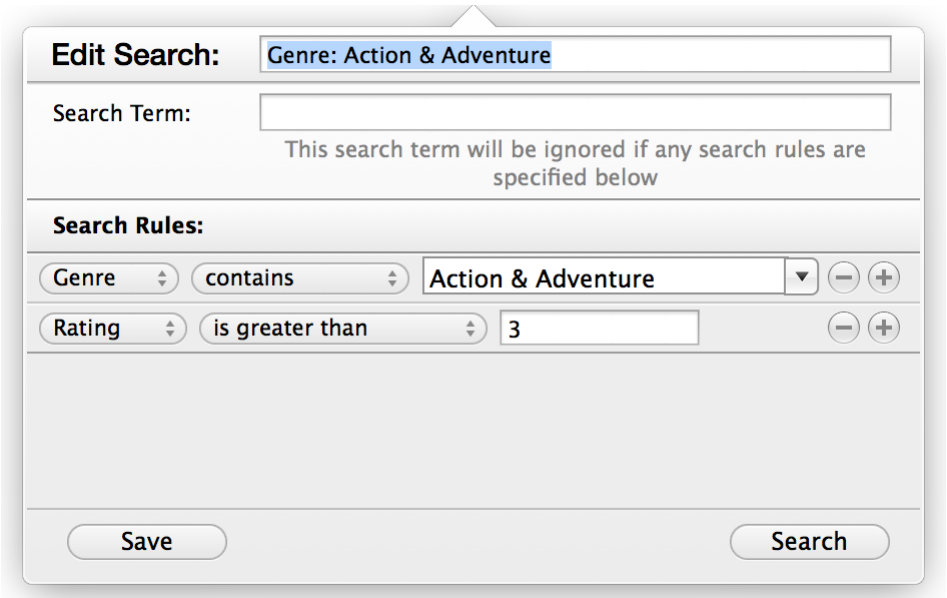


After you type in a search term, a bar will appear below the Search field with a Save button.

Click the **Save** button to save the search. Tap Forms will display the search beneath the form on the left side of the window.



For more advanced searches, click the Search button to the left of the Search field. Tap Forms will display the advanced search popover where you can add Search Rules which target your search to specific fields.



Click the **+** button to the right of a Search Rule to add a new Search Rule.

> When you add multiple Search Rules, Tap Forms will combine each rule together to reduce the number of records returned from the search. So the more Search Rules you add, the fewer records will be returned.

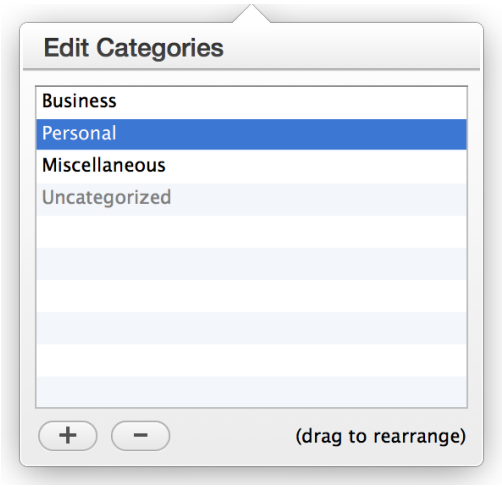
Click the **Save** button to save your search. Click the Search button if you don't want to save your search but you still want to filter your records.

— Field Types | Categories —>

Categories

Categories are used to group forms together. Tap Forms ships with a few built-in categories, but you are free to modify them, delete them, or add to them.

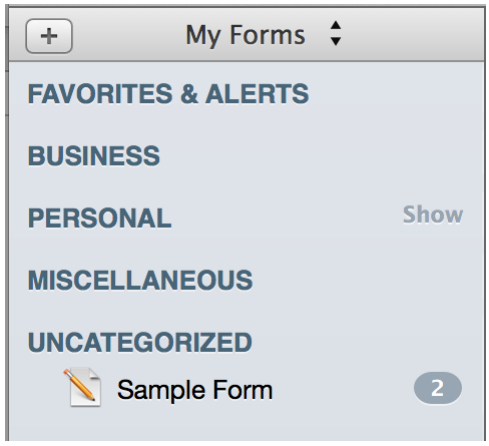
To manage your categories, click on the Categories button in the tool bar.

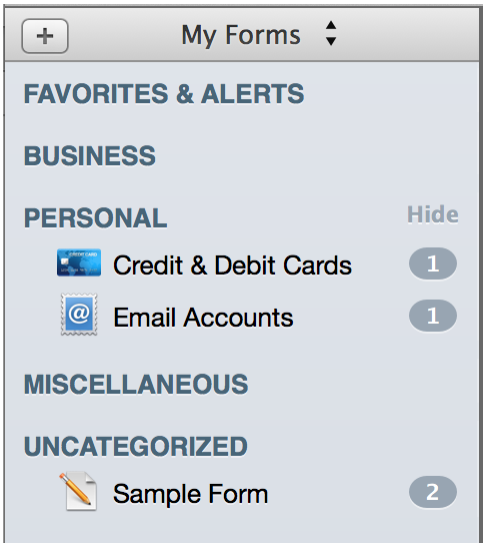


You can drag the categories up and down to rearrange them. The list of forms on the left will update when you rearrange your categories.

> If you delete a category, all forms which belong to that category are moved into the Uncategorized category. You cannot delete the Uncategorized category.

If your categories are not showing any forms beneath them then it's probably because they are in a collapsed state. Hover your mouse over the categories to reveal the Show button on the right. Click on it to expand the category.





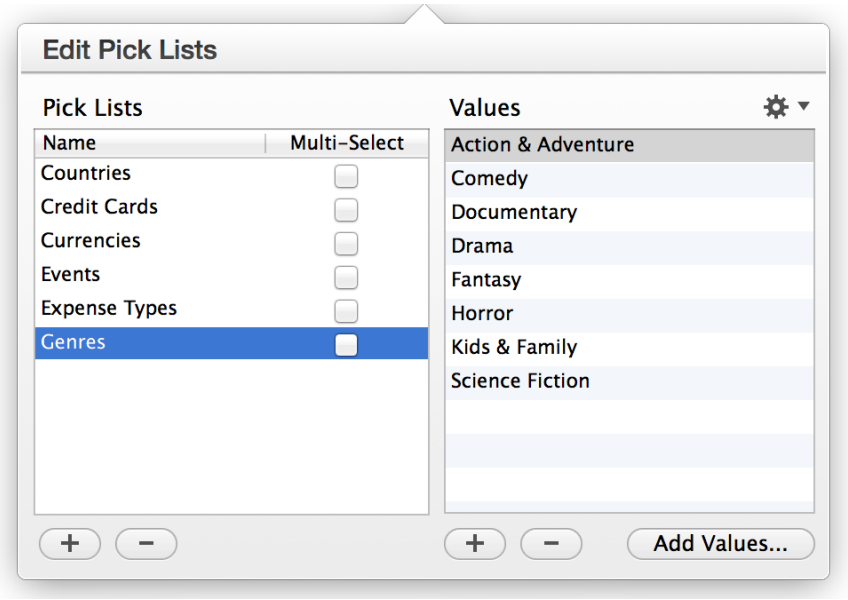
— Searching

Pick Lists —>

Pick Lists

Pick Lists are convenient lists of values that you can use on any Text or Number field in any form. You can even share the same Pick Lists between different forms and fields. You can create single select pick lists or multi-select pick lists. They both show the same information but multi-select pick lists allow you to select more than one value at a time. Single select pick lists allow you to select only a single value at a time.

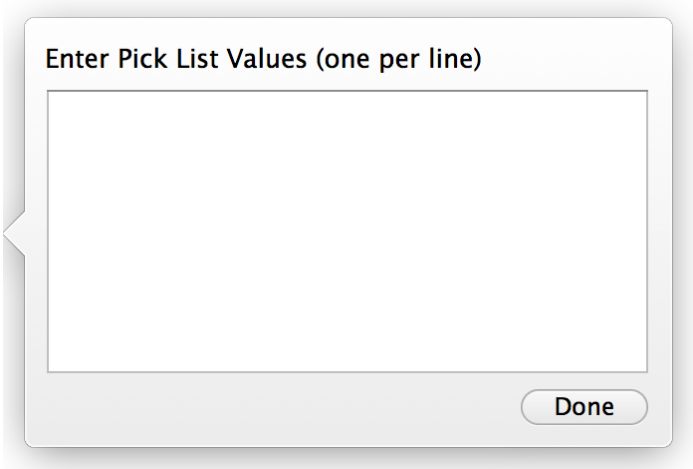
To edit a Pick List, click on the Pick Lists button in the toolbar:



To add a new Pick List, click the + button at the bottom-left of the popover. Click the checkbox in the multi-select column to make the new Pick List a multi-select Pick List.

To add a new value to the selected Pick List, click the + button beneath the values list.

If you have lots of values to add to a Pick List, it would be much quicker to click the **Add Values…** button and type your new values into the popover that is displayed. You can even paste values into the popover if you already have a list of values on your clipboard.



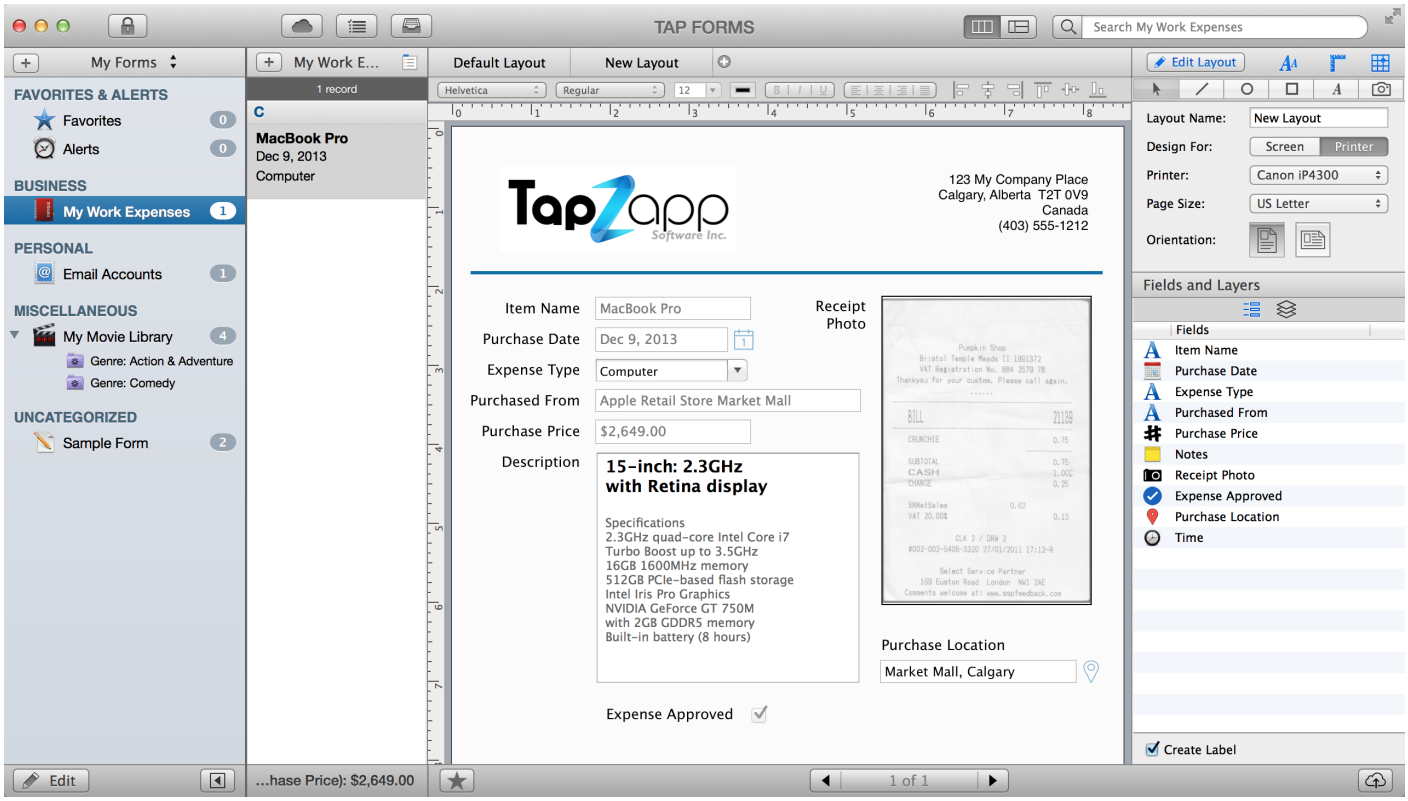
To associate a Pick List with a field:

1. Click the Edit button for the form.
2. Click the Field Properties tab.
3. Click the field that you'd like to associate the Pick List with.
4. Click the Pick List popup button.
5. Select the Pick List from the popup button.
6. Click the Done button on the Edit Form sheet.

— Categories | Layout Designer —>

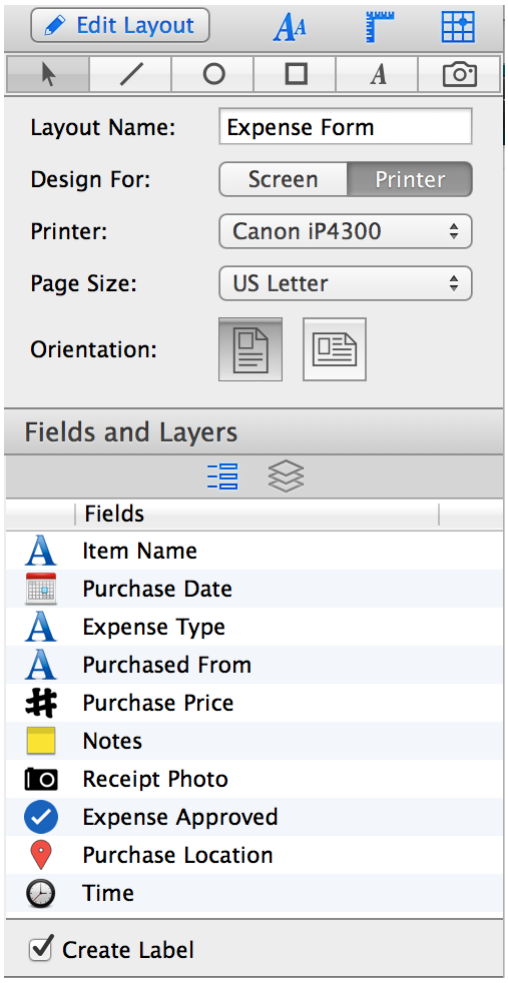
Layout Designer

The new layout designer makes creating beautiful layouts as easy as dragging and dropping.



To create your first layout, click the **+** button beside **Default Layout**

Click the **Edit Layout** button to display the Layout Inspector panel:



The Layout Inspector provides you with tools to customize the layout of your form's fields and other graphic elements you might like to have on the page.

The first row of buttons in the Layout Inspector let you turn on and off the **Layout Inspector** itself, the **Text Inspector**, the **Rulers**, and the **Snap to Grid** functionality.

The second row of buttons contains the layout designer tools.

The **Arrow** tool lets you select, resize, and drag around the objects on your layout page.

The **Line, Oval, and Rectangle** tools allow you to draw lines, ovals and rectangles on the page. You can constrain the line, oval or rectangle by holding down the shift key as you drag a handle around on the page.

You can change the stroke of a line, circle or rectangle to make it thicker or thinner. You can also change the stroke colour of lines, ovals, and rectangles using the Graphic Properties Inspector which will appear when you select an object. Ovals and rectangles can also have their fill colours changed.

The **Text** tool allows you to create blocks of text which will stay the same on every record. This would be useful for things like company names, addresses, or any other kind of text that you want to remain the same on every record.

The **Image** tool allows you to create areas on the layout which will be filled with any image you have available on your computer. These images will stay the same on every record. This would be good for things like a company logo, icon, photo or any other kind of image you want to have on every record.

> The Image tool is different than a Photo field in your form. A Photo field will change its image with every record while the Image tool's image will remain the same on every record.

Layout Properties

The Layout Properites panel lets you change the layout name, what your'e designing your layout for (screen or printer), set the printer, the page size, and the page orientation.

Fields and Layers

The Fields list shows all the fields that are available to be dragged into the layout area. Below the Fields list is a checkbox which will tell Tap Forms to automatically create a label for you when you drag a field to the layout area. Labels will be given the default value of the field name, but they can be changed after they have been created. You can change label colours, fonts, sizes, and text alignment.

The Layers list shows all of the objects that are already on the page. You can drag these objects up and down to send them behind or in front of other objects. You can also lock objects so they can't be moved around accidentally.

Text Inspector and Alignment Controls

The Text Inspector lets you set fonts, sizes, colours and text alignment (left, centre, right, or full). When the Text Inspector is visible you also have access to controls for aligning objects on the layout area. You can select multiple objects and align them all together using these controls.

Objects can have their left edges, right edges, bottom edges, and top edges aligned. They can also be aligned vertically or horizontally. The Layout menu also gives you some further options for sizing all the selected objects so they become the same width or height.

The Text Inspector can also be used when editing a record to set the text properties of a Note field. You can highlight some text and change the font, the font size, make it bold, italicized, underlined, or adjust the text's alignment.

— Pick Lists | Bento Template Importer —>

Bento Template Importer

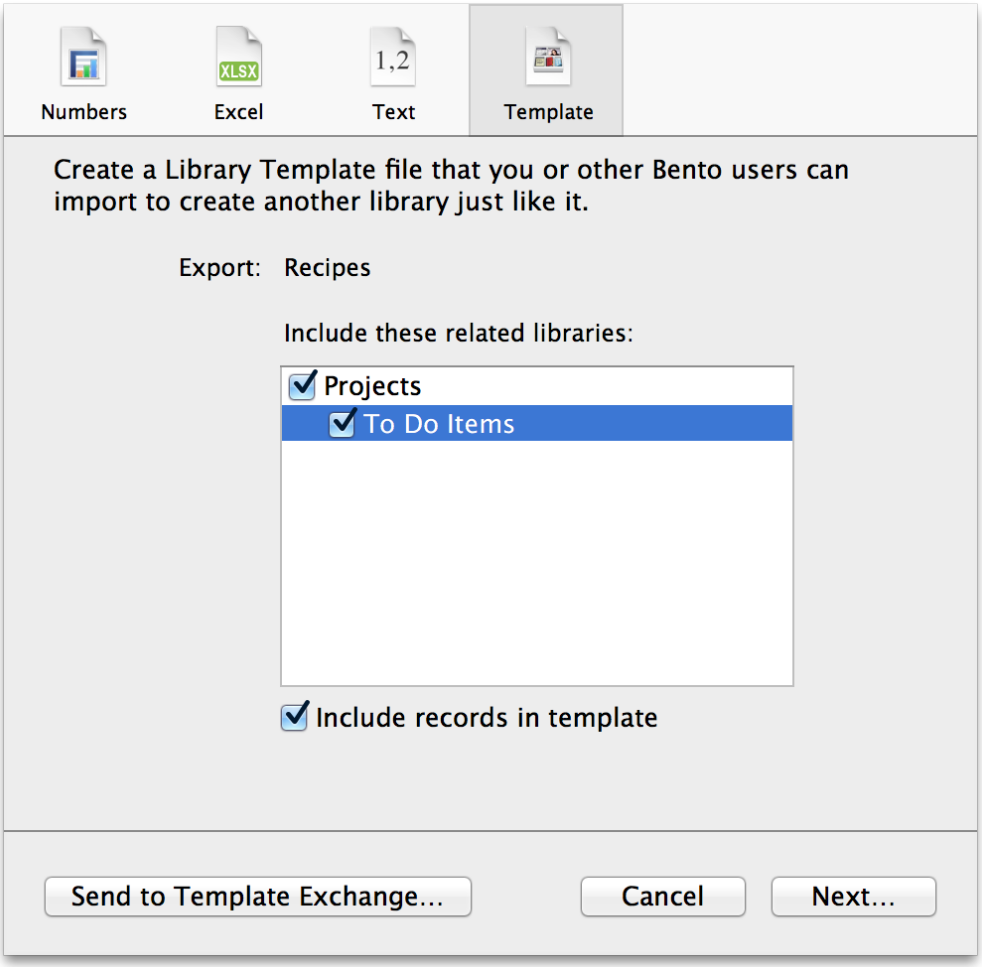
Tap Forms for Mac 2.0 includes a new Bento Template Import command to help you in making the transition from Bento, which has been discontinued by FileMaker, to Tap Forms.

Tap Forms will import Bento 3.0 to 4.1 version templates. You will need version 4.0 or higher of Bento in order to be able to export your Bento data along with your templates. Please download the Bento 4.1.2 update from here: http://help.filemaker.com/app/answers/detail/a_id/11182

To import your Bento template in Tap Forms:

1. Launch Bento and select your library.

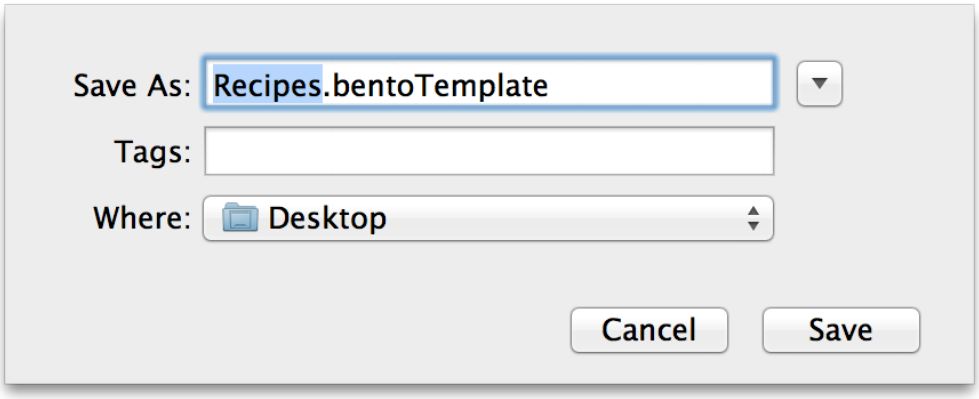
2. Select Export… from the File menu and choose the Template option.



Make sure you click on each related library displayed in the “Include these related libraries” list if you want Tap Forms to be able to join your related forms together. Also click on “Include records in template” if you want Tap Forms be able to import your Bento data also.

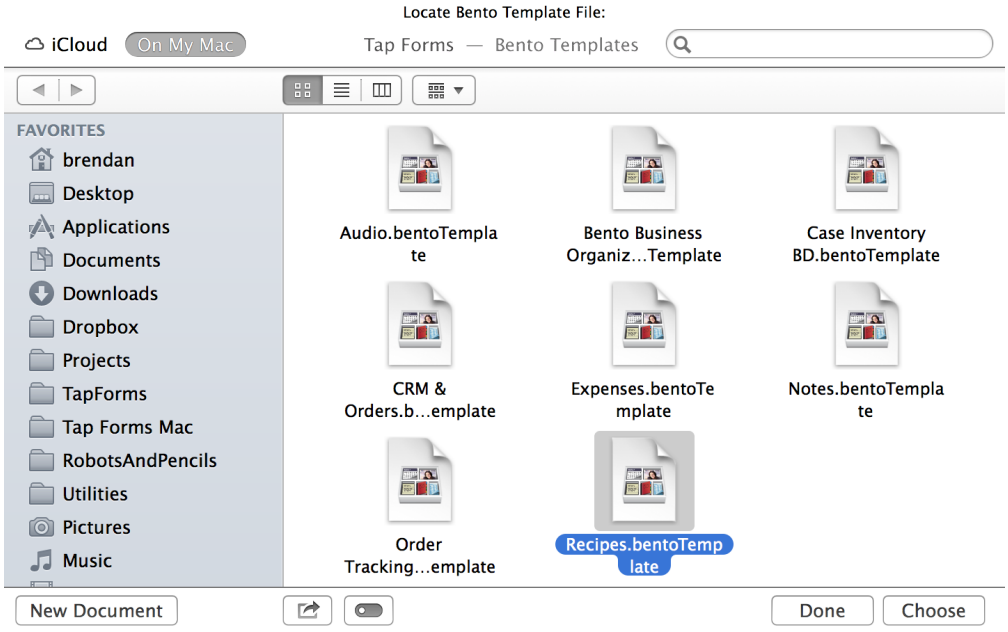
If you don’t see the “Include records in template” option, then you’re not using the latest version of Bento. You’ll need to download that first before proceeding. The link is at the top of this page.

3. Save your template.



4. Launch Tap Forms and select the “Import Bento Template” command from the File menu and select your Bento template file.

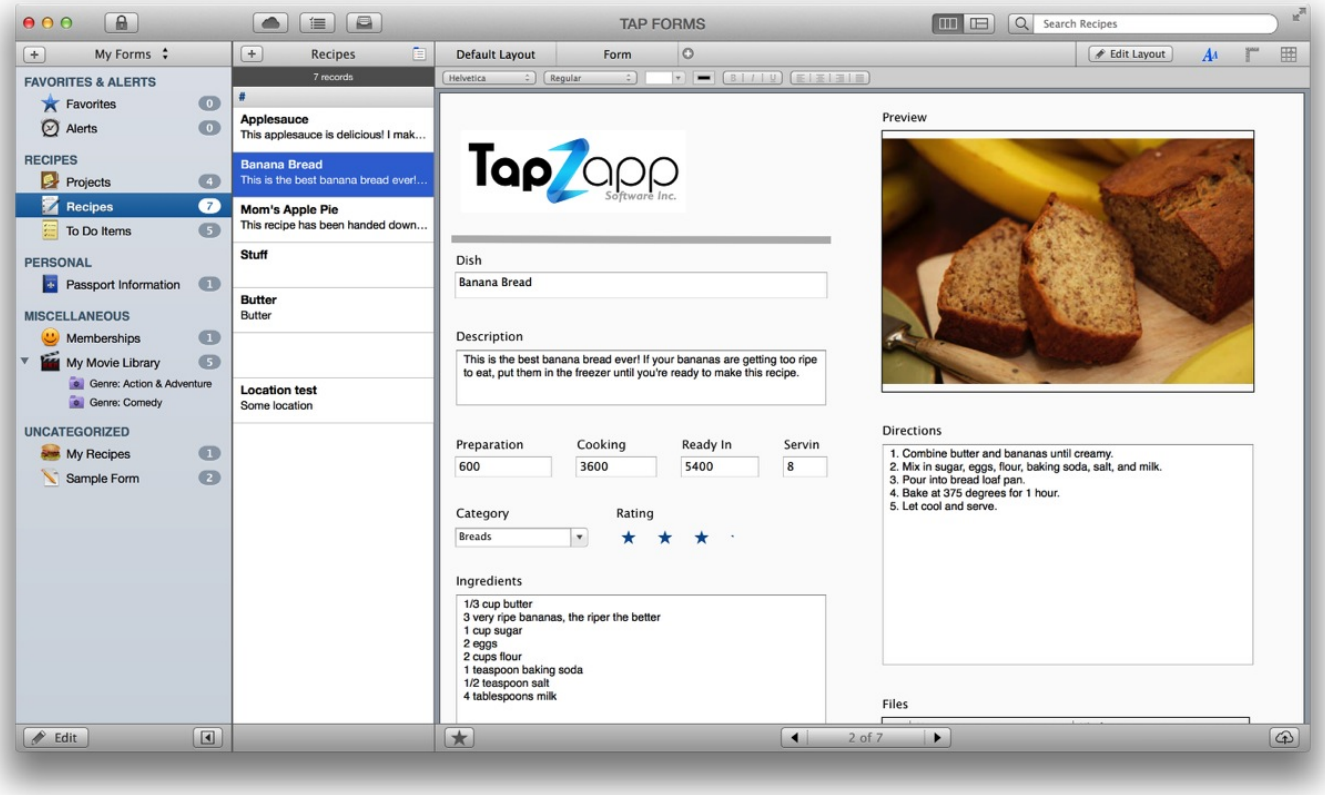
Click the Choose button when you’ve found your Bento template.



Tap Forms will now import your template and records.

If your template contains more than one related form, Tap Forms will automatically create a new category for you and put your related forms together inside that category. The category will be given a name based upon the file name of the template you are importing.

You will need to expand the category to view the forms by clicking just to the right of the category name on the “Show” text.



Once you've imported your Bento template, you can click on any of the layouts that Tap Forms generated from the Bento library. You may need to reposition some elements and/or make some adjustments to the font sizes and styles.

— Layout Designer | Bento Fields in Tap Forms —>

Bento Fields in Tap Forms

The following table describes how Tap Forms imports Bento forms and fields:

Bento	Tap Forms
Form	A Bento form is converted to a Tap Forms layout. Once you've imported a Bento template, you can further customize the layout in Tap Forms or add additional layouts to meet your needs.
Text	Bento text fields can be one or more lines long. Tap Forms has 2 different text field types. • Text fields are used for shorter one-line bits of information, such as a Movie Title. • Note fields are used for larger amounts of text, such as a Movie Synopsis. • Tap Forms will convert Bento text fields into Text or Note fields depending on the height of the field in the Bento form. • Tall fields in Bento will be converted to Note fields in Tap Forms. • Small fields in Bento will be converted to Text fields in Tap Forms.
Number	Bento Number fields are converted to Number fields in Tap Forms. The Number Formatter is set to Decimals.
Currency	Bento Currency fields are converted to Number fields in Tap Forms. The Number Formatter is set to Currency and the Decimal Places is set to 2. **Note:** Tap Forms supports only the currency that you have by default according to the system's regional settings. For example, in Canada, all currency values will be in CAD. In the UK, all currency values will be in GBP.
Counter	Counter fields are converted to Number fields.
Duration	Duration fields are converted to Number fields with the Number Formatter set to "hours, mins".
Rating	Rating fields are converted to Tap Forms Rating fields.
Dates and Times	Times are converted to Time fields. Dates are converted to Date fields. If the Date field has the flag to show the Time set, then it's converted to a Tap Forms Date & Time field.
Media	Media fields are converted to Photo fields. The photo file is also extracted and copied into the Tap Forms Photos folder.
Checkbox	Checkbox fields are converted to Checkmark fields.
Choice	Choice fields are converted to Text fields. The values in the Choice field are converted to a Pick List and associated with the Text field.
Calculation	Calculation fields are converted to Calculation fields. Tap Forms makes a best guess at trying to convert the Bento formula to a Tap Forms formula, but it's not going to be very accurate since Bento supports more calculation options than Tap Forms at this time. You will probably have to re-do your calculation formulas after the migration.
Location	Locations fields are converted to Location fields. The longitude and latitude values are also set as the location name in Tap Forms.

Phone	Phone number lists are converted to a Phone field in Tap Forms. Only the first phone number is imported. All other phone numbers in the list are ignored.
Email	Email lists are converted to an Email field in Tap Forms. Only the first email address is imported. All other email addresses in the list are ignored.
URL	URL fields are converted to a Website field. Only the first value is imported. All other URL values are ignored.
Related Records	Related Record fields are converted into Link to Form fields with the Many to Many Link Type set. Tap Forms also re-establishes the relationship data between forms.
File List	File List fields are converted to File Attachment fields with the Multi-File Enabled setting turned on. Files are copied into the Tap Forms Attachments folder.

The Bento Template Importer will be improved over time as new features are added to Tap Forms which match some of the features previously available in Bento.

— Bento Template Importer | Import Records —>

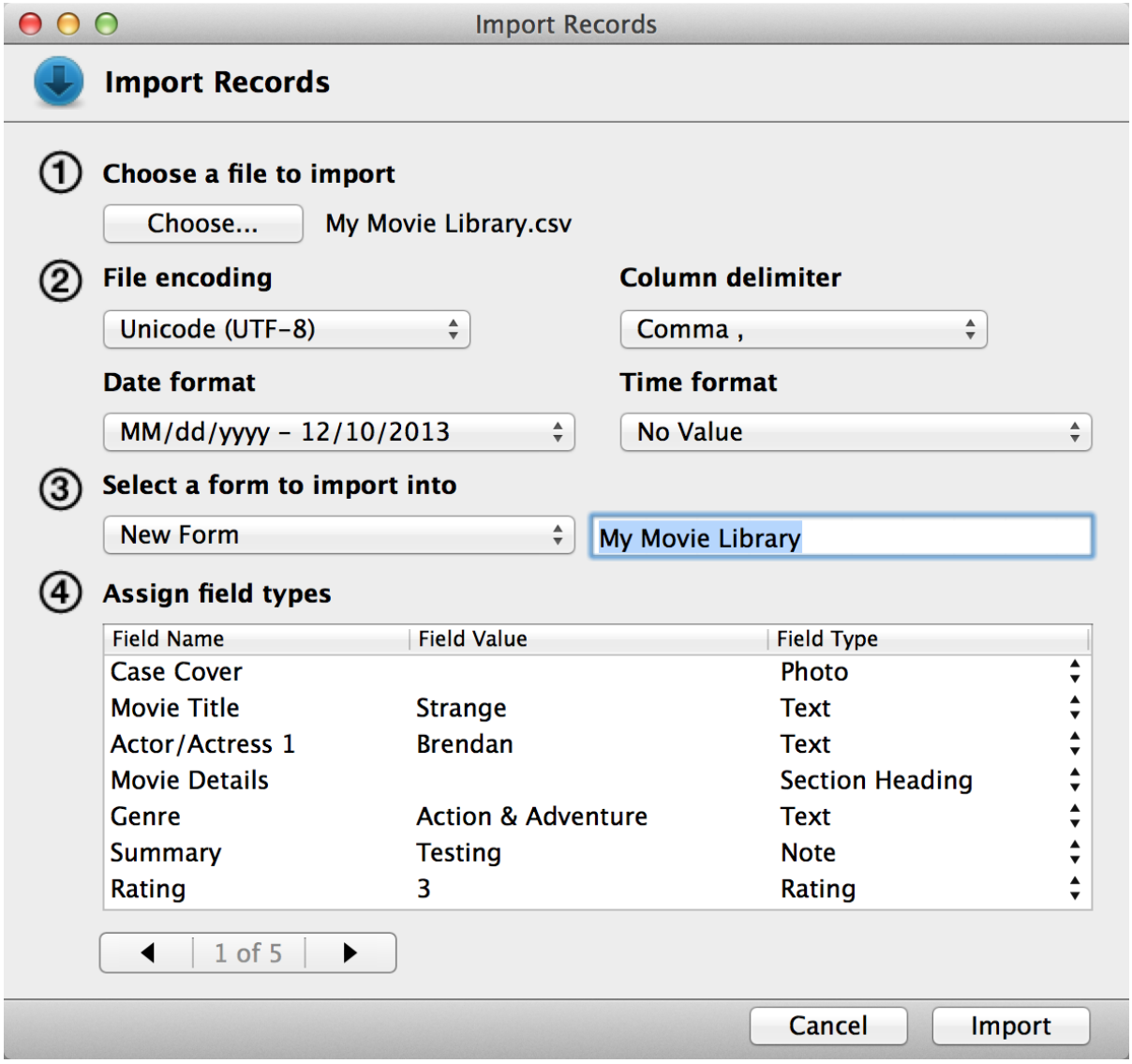
Import Records

Tap Forms provides a wide variety of options for importing data from other applications. Before you can import a file to Tap Forms you must export it from another app to a text file. The text file can have a .csv (comma separated values), .txt (text), or .tsv (tab separated values) file extension. These file types are all pretty much the same but contain slightly different column delimiters. Just make sure whatever column delimiter you use in the file, you set Tap Forms to use the same column delimiter.

> When you import a CSV file, Tap Forms uses the first row of your file as the field names to create when you choose the New Form option. If you choose an existing form to import your records into, you must make sure that the first row values match the field names exactly as you have them named in your form. Otherwise Tap Forms will create a new field for every value in the first row which does not match a field name in the form you're importing into.

Choose File

The first thing to do is click the Choose file button and then select a file you wish to import.

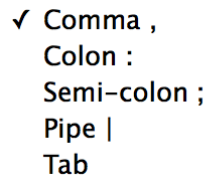


File Encoding

It's very important to set the file encoding setting correct for the file you're trying to import. If you don't set it correctly, Tap Forms won't be able to understand all the characters in the file you're trying to import. This will most likely manifest itself in Tap Forms importing fewer rows than are actually in the file. Another issue that you might notice is strange garbage characters appearing instead of properly accented characters.

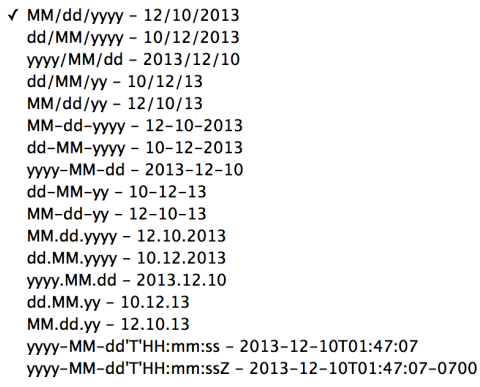
File encoding is just a way of describing to a computer which characters the data in the file represents. When you open a text file we just see characters, words and sentences. But to a computer, the file contains just a bunch of numbers all strung together. File encodings tell a computer what characters to display on screen when it encounters different numbers in a text file. For example, the character A is number 65, B is 66, and so on when using the ASCII file encoding format. UTF-8 is the most sensible file encoding to use because it can encode characters from any language on Earth. However, if you're importing from a Windows PC that exported a CSV file using Excel, you most likely want to use Windows Latin 1. On the Mac you may need to use Mac OS Roman file encoding.

Column Delimter



Tap Forms supports the following set of column delimiters: comma, semi-colon, tab, and pipe. Column delimiters help tell Tap Forms how to distinguish one field's value from the next. If you have a delimiter within your data then you must put double-quotes around the value. For example "Rolling Stones, The". Because there is a comma in the value, the entire value must be surrounded with double quotes. Mostly you never have to worry about this sort of thing because programs like Excel and Numbers should automatically put double quotes around any data that contains a column delimiter within it. Tap Forms does then automatically when you export records.

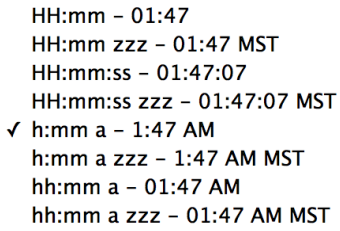
Date Format



When you have a file that has dates in it, Tap Forms needs to be told how to interpret the date values. Is it month, day, year, or day, month, year? In order for Tap Forms to understand the date values in your file, you must tell it what format your date columns use. Tap Forms only understands date formats that are numeric based. So if you have a date in your file like "Dec 10, 2013" then you need to convert that to be "12/10/2013" or some other variation on a numeric date format. As long as it follows one of the formats displayed in the list of date formats in Tap Forms.

There are a couple Date & Time formats in the popup menu also. You can use these if your date has a combined date & time value within it that has the date and time separated by the letter T. For example, when Bento exports its Date & Time values it uses this format: yyyy-MM-dd'T'HH:mm:ss

Time Format



Time formats follow the same principal as date formats. Just make sure your time format is set to be the same format as what is contained within your CSV file.

Select a Form

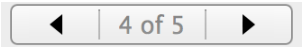
You can either enter a name for a new form to be created, or if you already have a form that you'd like to import your CSV file into, select it from the list of available forms. If you select New Form, Tap Forms will create a new form for you using the field names from the first row of the CSV file.

Assign Field Types

It's important to tell Tap Forms before you import a CSV file what the field types are that it is importing. This helps Tap Forms to properly interpret the data being imported. If you don't do this and you try to change field types after then Tap Forms will appear to lose the values in the field for which you changed the type. The data is not gone, it's just stored in a different column in the database.

> Tap Forms stores text data in a different column than it stores dates, numbers, location, or checkmark data. There are some fields which you can safely switch types. For example, switching a Text field to a Note field is safe. Switching a Rating field to a Number field is safe. But switching a Text field to a Date field is not safe.

Record Navigator



Click the record navigator to flip through the records in your CSV file. This will help you to determine if you have your file encoding, column delimiter, and your date and time formats set correctly.

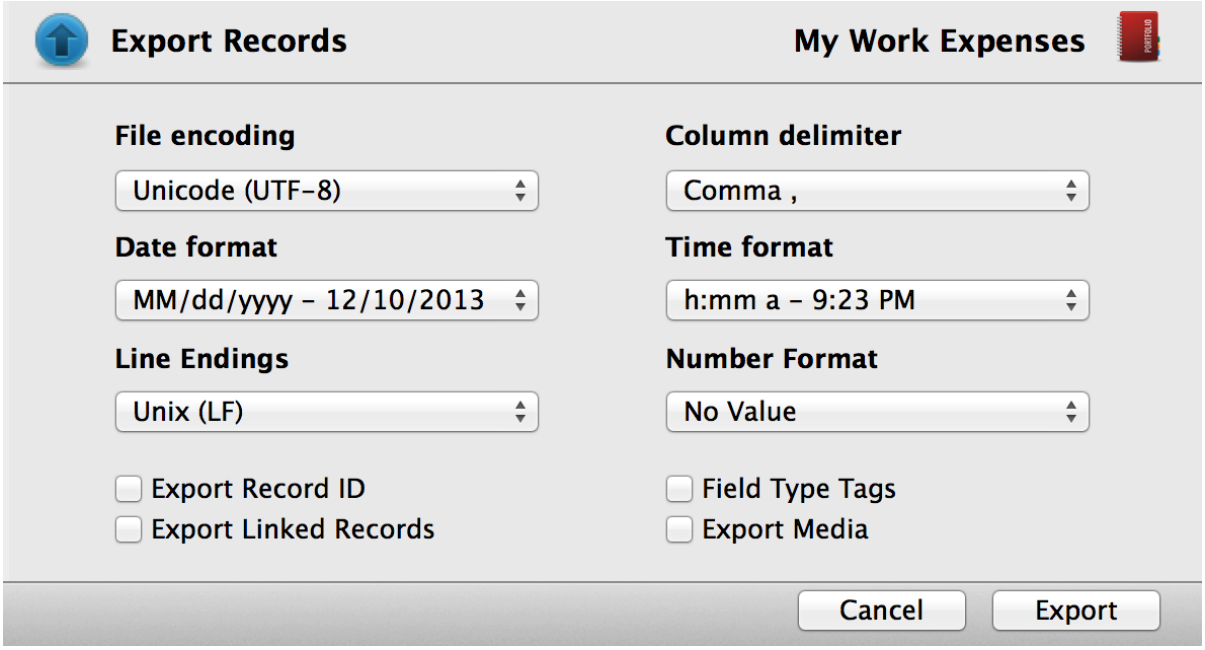
Click the **Import** button when you're ready to start the import process.

— Bento Fields in Tap Forms | Export Records —>

Export Records

Along with importing CSV files, Tap Forms can generate CSV files so you can use your Tap Forms data in other applications.

To export your records, click the **File** menu and select **Export Records…**

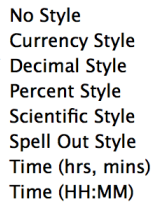


The various options on the Export Records screen tell Tap Forms how to generate the file that you'll import into other applications.

File Encodings

As in the Import Records function, you can tell Tap Forms to export your file in a variety of file encodings. UTF-8 is generally the best encoding to use as it supports encoding characters in all languages. It may depend on the program you want to import your data into that dictates which file encoding you should use. Check the other program to see what file encodings it supports.

Number Formats



Tap Forms can also export Number fields in a variety of different formats. For the Currency format, Tap Forms will use your regional number format settings to determine what currency symbol to use during the export. For example, in Canada and the USA currency numbers will be exported like $29.99, but in Europe the same value would be exported as 29.99 €.

Export Record ID

By enabling this option, you're telling Tap Forms to export the values that uniquely identify each record in your form. Tap Forms will add a column called form_record_id to your CSV file. If you import a file into Tap Forms which has a form_record_id column, it will search for matching records and update their field values rather than adding new records to your form.

Export Linked Records

With this option enabled, Tap Forms will generate separate files containing the records from any linked forms. If you want to import these files into another copy of Tap Forms, make sure you import the parent form's CSV file first and then import the child records. That way Tap Forms will be able to join up all the child records to the parent records.

Field Type Tags

By turning on Field Type Tags, you're telling Tap Forms to generate a header row that contains a tag that identifies the field's type.

The following are the tags that Tap Forms will generate

Tag	Field Type
<text>	Text
<number>	Number
<date>	Date
<time>	Time
<date_time>	Date & Time
<check_mark>	Checkmark
<contact>	Contact
<web_site>	Website
<note>	Note

<photo>	Photo
<audio>	Audio Recording
<phone>	Phone Number
<rating>	Rating
<location>	Location
<email>	Email Address
<calc>	Calculation
<file>	File Attachment
<form>	Link to Form
<draw>	Drawing
<section>	Section Heading
<date_created>	Date Created
<date_modified>	Date Modified

For example, a CSV export file of a movie library form would look something like this:

Movie Title<text>	,	**Release Year<number>**	,	**Synopsis<note>**	,	**I Watched This<check_mark>**
Terminator 2: Judgement Day	,	1991	,	The cyborg who once tried to kill Sarah Connor is dead, and another T-101 must now protect her teenage son, John Connor, from an even more powerful and advanced Terminator, the T-1000.	,	1

Export Media

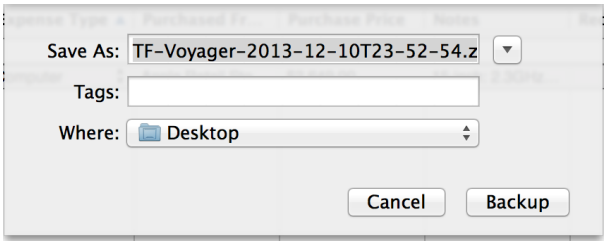
When you enable this flag, Tap Forms will generate a zip file that contains your records in CSV files and also a folder within the zip file that contain all of the media referenced in your records. Each media type will have a separate folder named with the name of the form being exported and the media type. For example “My Work Expenses-Photos”, “My Work Expenses-Files”, etc.

At the moment, file attachment fields with the multiple files setting enabled won’t get exported into the zip file. That feature is coming in a future update.

— Import Records | Backup & Restore —>

Backup & Restore

From the **File** menu, select **Backup…** to have Tap Forms generate a backup file for you.



Backups have file names that start with TF and end with .zip. The file name also contain the name of your computer and the timestamp of when you selected the Backup command. Backup files are just compressed files that contain your database file, photos, drawings, audio recordings, and file attachments. So you can double-click on one to uncompress it to see what's inside.

Choose the **Restore** command to select a backup file and restore it over top your current database.

> Restoring will erase all the data in your current database and replace it with the data from the database file contained within the backup file.

— Export Records | iCloud Sync —>

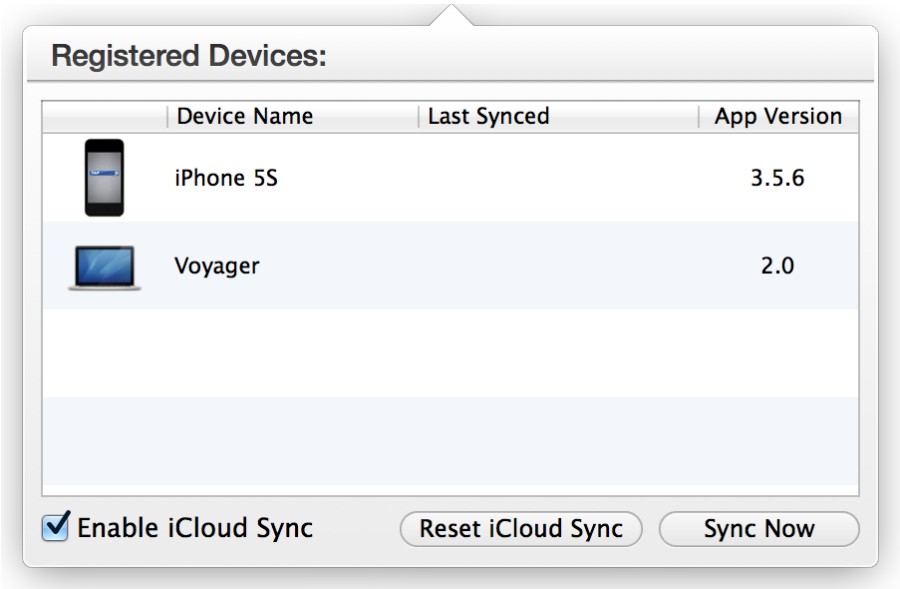
iCloud Sync

Tap Forms uses iCloud to sync data between your devices. Specifically Tap Forms uses the Documents & Data iCloud service. So before you can enable iCloud sync in Tap Forms, please make sure you have Documents & Data enabled in the iCloud settings on all your devices.

In the most recent version of Tap Forms for Mac and iOS, you will now need to visit the Security Settings screen and set the encryption key to the same value on all of your copies of Tap Forms. If you don't do that you may encounter a Sync Failed message.

Enable iCloud Sync in Tap Forms on all your devices.

1. Click the iCloud button in the toolbar
2. Click on the Enable iCloud Sync checkbox.
3. Do the same on your other devices.
4. You will see each registered device listed underneath the Registered Devices list. You may need to close the iCloud Sync popover and reopen it for the list to refresh on the Mac version.



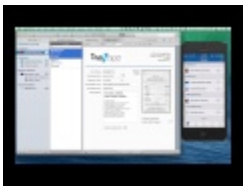
If you don't see all the devices you've enabled iCloud Sync on in Tap Forms on the list of Registered Devices, then reboot all your devices. On iOS do a complete power off and then power on. Then check the list again.

Whenever you want to send the changes you've made on your Mac to your other devices, click the upload to iCloud button at the bottom-right of the window or click the Sync Now button in the iCloud Sync popover view. **Uploading to iCloud is a manual process.** The upload to iCloud button is used ONLY for uploading your data to iCloud. Downloading from iCloud is an automatic process. You don't need to do anything to trigger a download from iCloud.

When you register a device with iCloud, your files will be moved from your device into your iCloud storage space. Depending on the size of your files (Photos, audio recordings, files in the Files area, etc.) and the number of them, it may take quite a while for them to be uploaded to iCloud and synced to your other devices. During this time, the iCloud Sync screen may take considerable time to return the list of registered devices to you. Please be patient and wait a while before trying again. You can continue to use Tap Forms while this happens automatically in the background.

iCloud Sync in Action

Watch this Youtube video to see how iCloud sync is used in Tap Forms.



— Backup & Restore | Relationships —>

Relationships

Tap Forms has the ability to link forms together to establish relationships between them. There are currently two types of links:

1. One to Many
2. Many to Many

To make it easier to identify what is being talked about in this section of the documentation, I'll refer to the main form as the **parent** form. Any form that the main form links to will be called the **child** form.

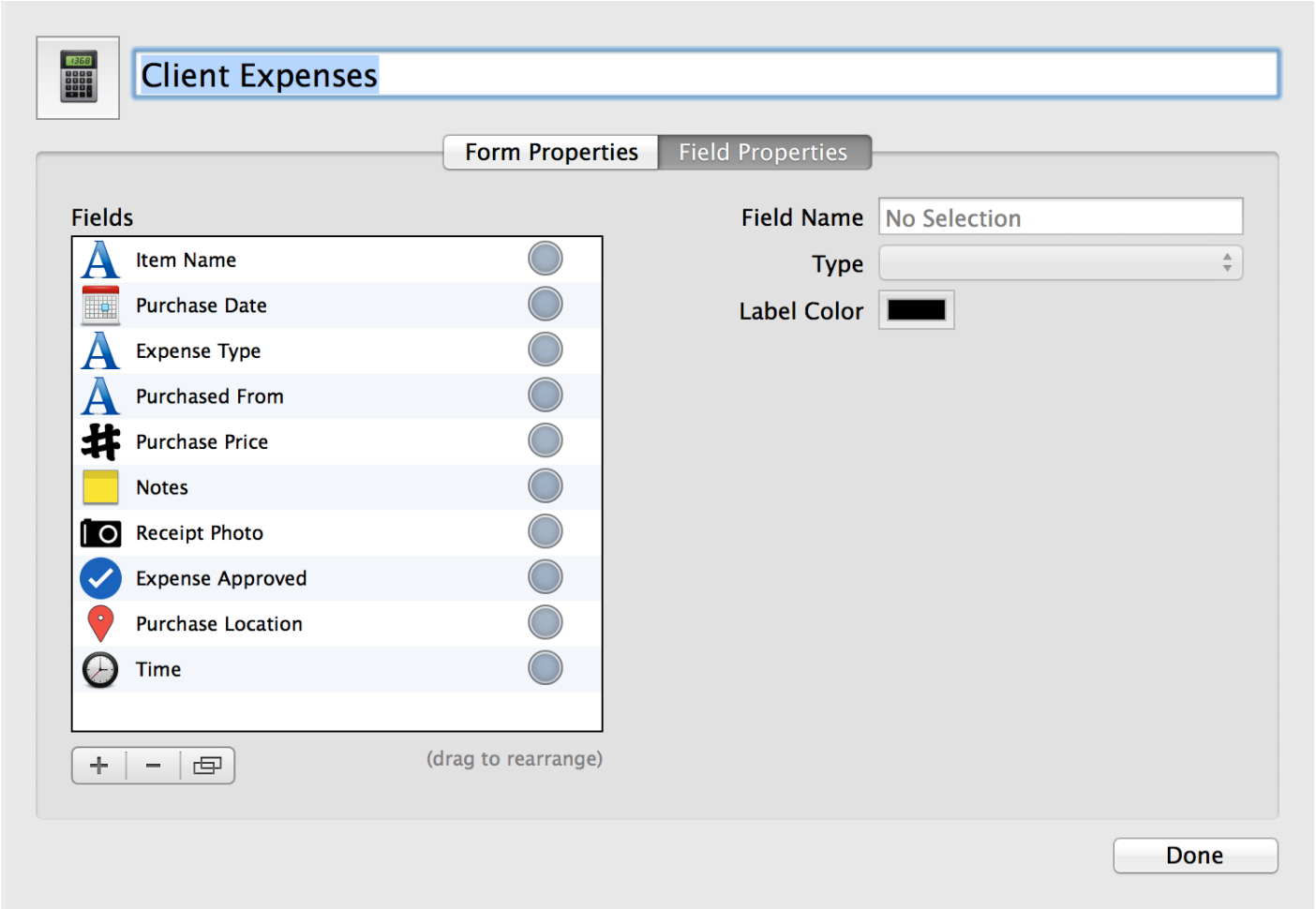
One to Many

The One to Many link type is useful in situations where the child form's data is unique to the parent record it's linked to. That is, no two parent records should link to the exact same records from the child form. It's easiest to describe this situation using an example.

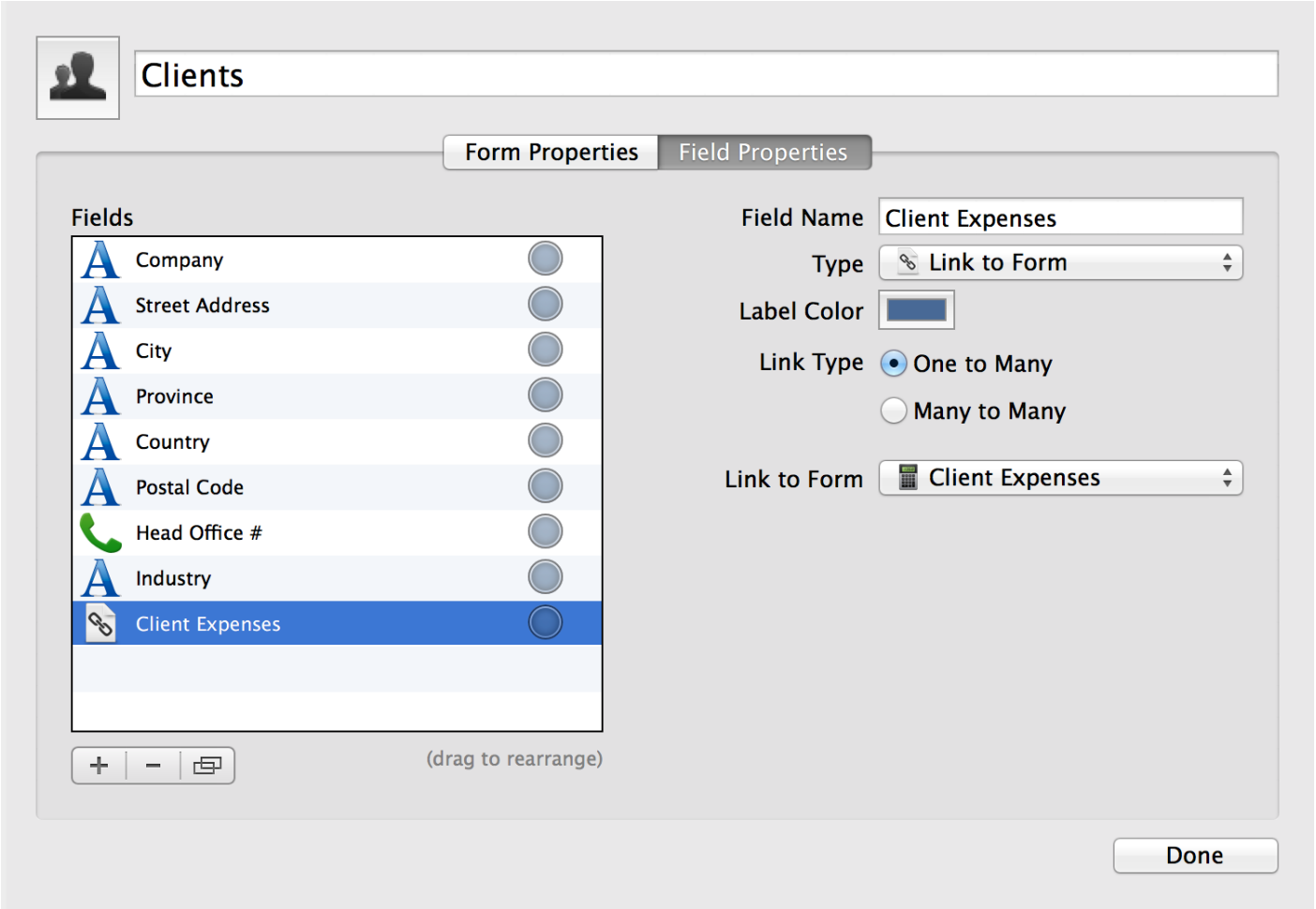
Keeping Track of Clients and Expenses

If you wanted to keep track of all the expenses you incur when working for a specific client, you wouldn't want those expenses to be linked to any other client than the one for whom you are currently working. A one to many relationship is useful in this situation. One client has many unique expenses which are attributable only to it.

Create a Client Expenses form:

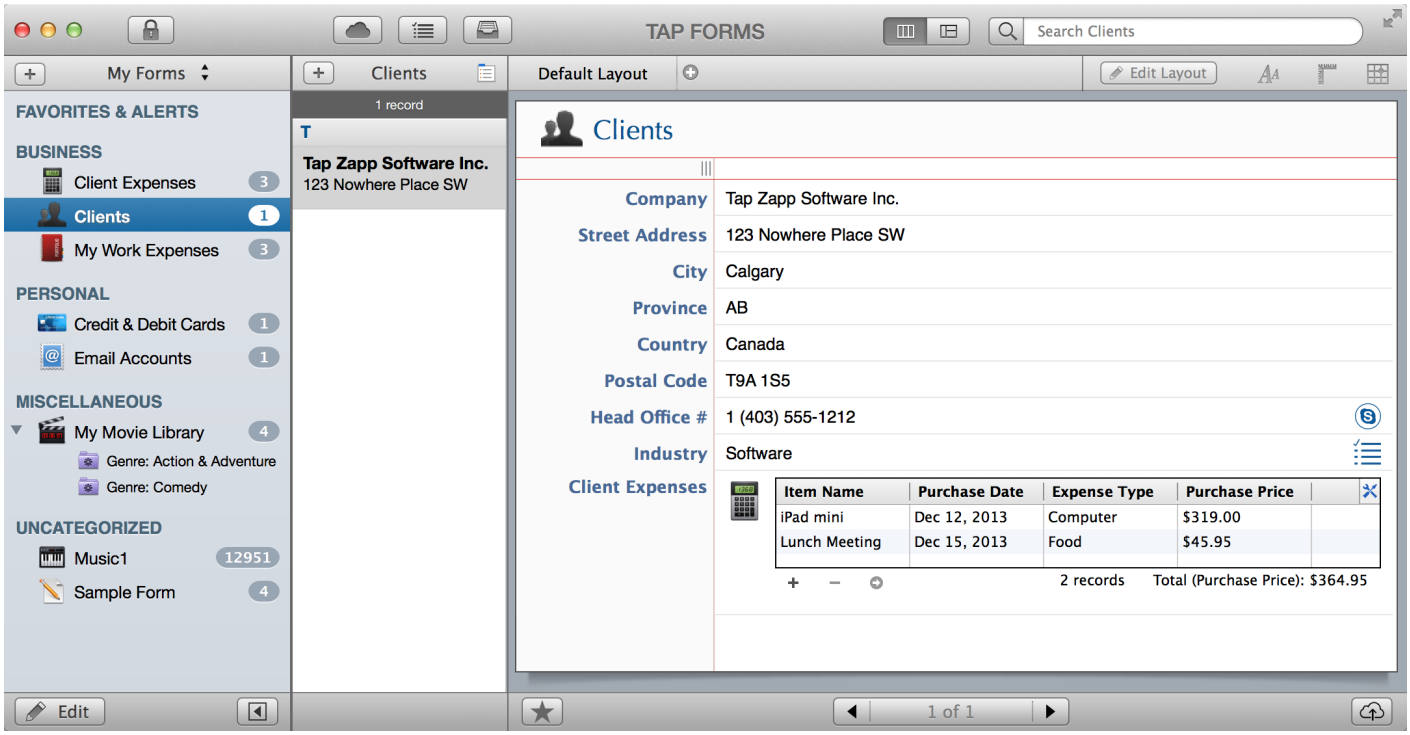


Create a Clients form and link it to the above Client Expenses form:

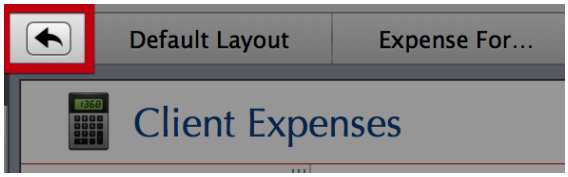


Make sure you've selected **One to Many** as the Link Type.

Now when you add or edit a record on your Client form, you can see the list of Client Expenses. Initially there will be none, but you can click the + button below the list of Client Expense records to add one. By adding a record from this view Tap Forms will link the new Client Expense record to the parent Client record.



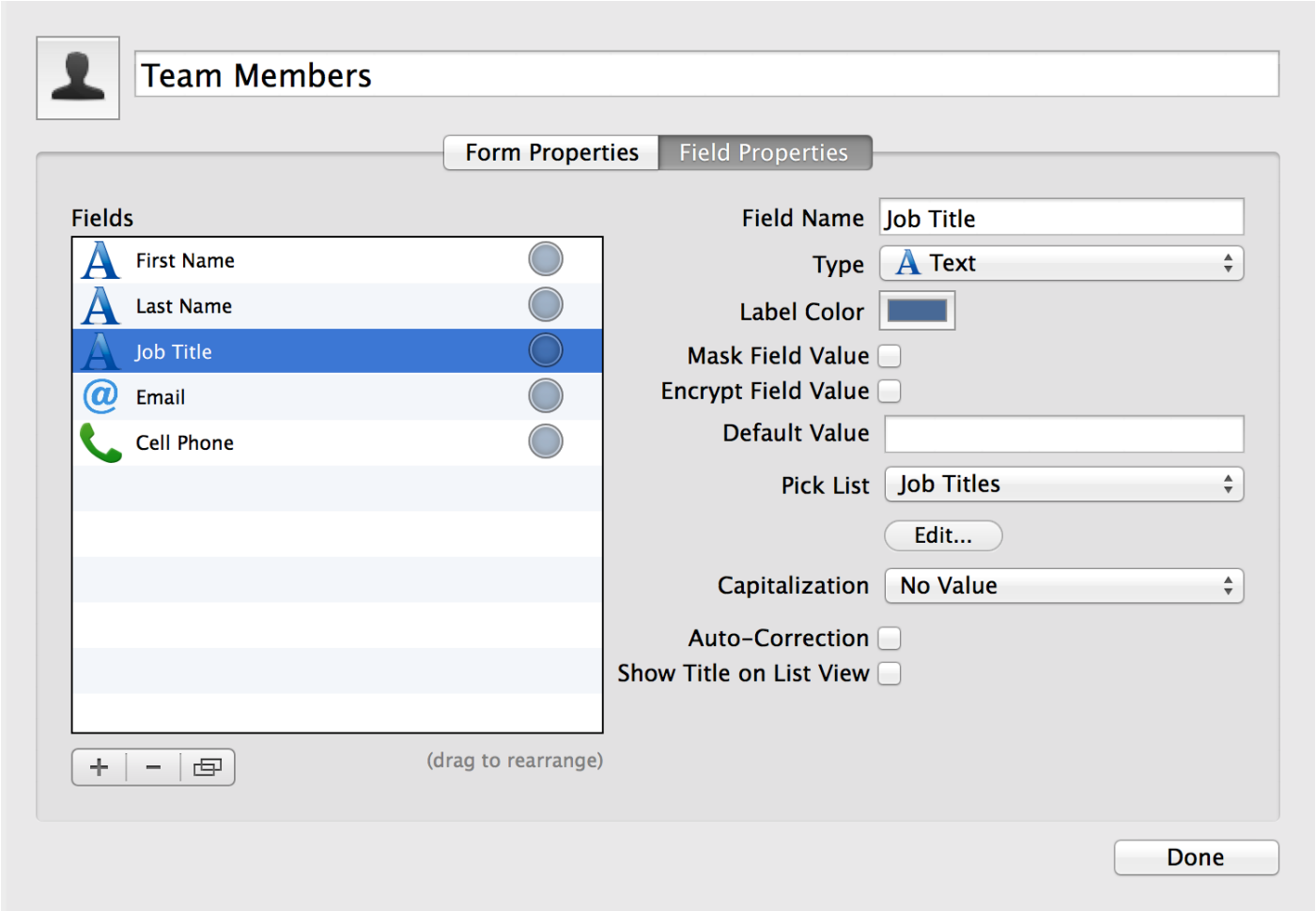
When you add a child record to the parent record form, Tap Forms will switch the display to the child form (in this case Client Expenses) along with a back button which when clicked will return you to the parent record from where you came.



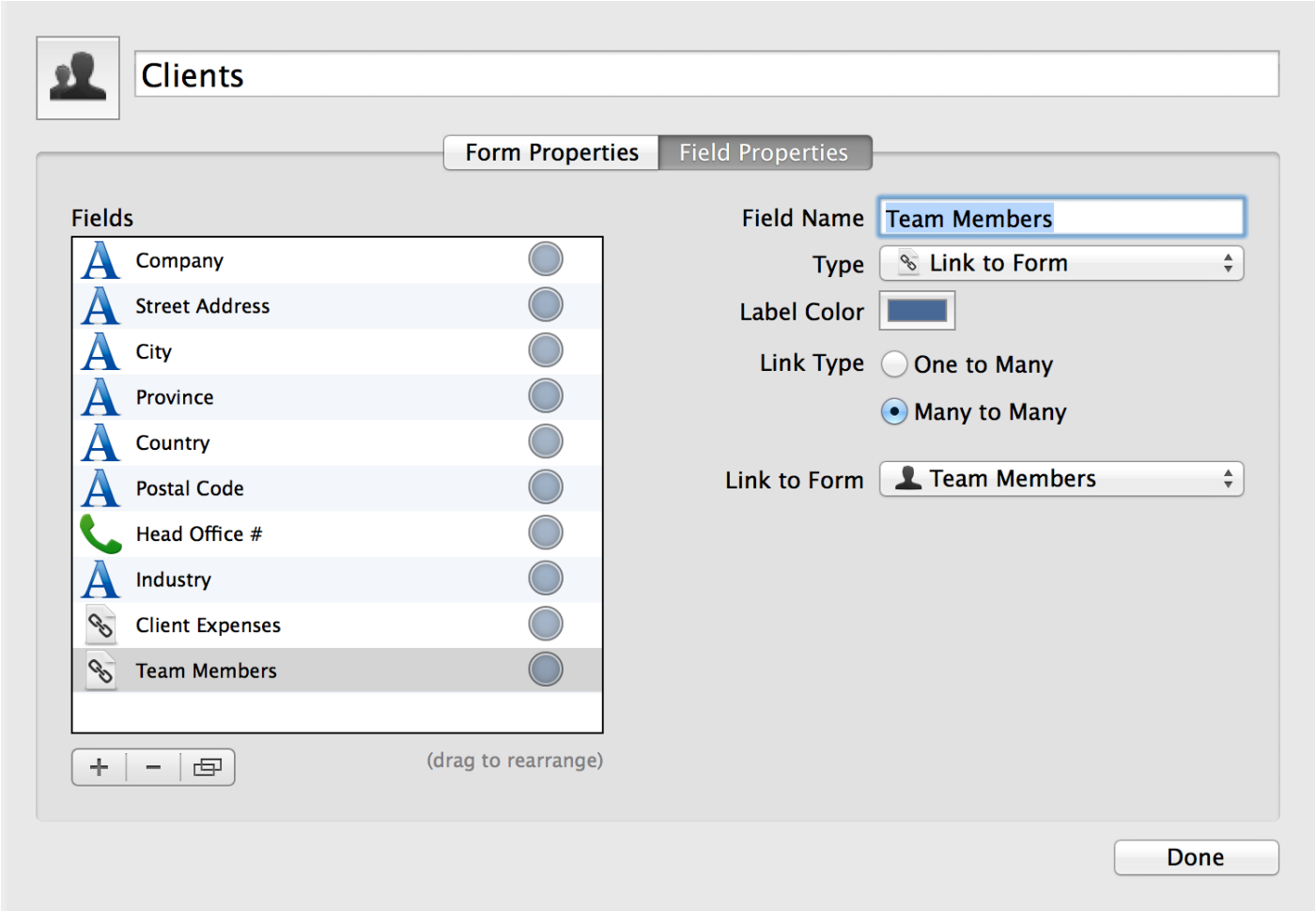
Many to Many

An example of a Many to Many link could be a list of team members who are assigned to projects for the selected Client.

Add a Team Members form that contains a list of people that work at your company. You could add their name and job title.

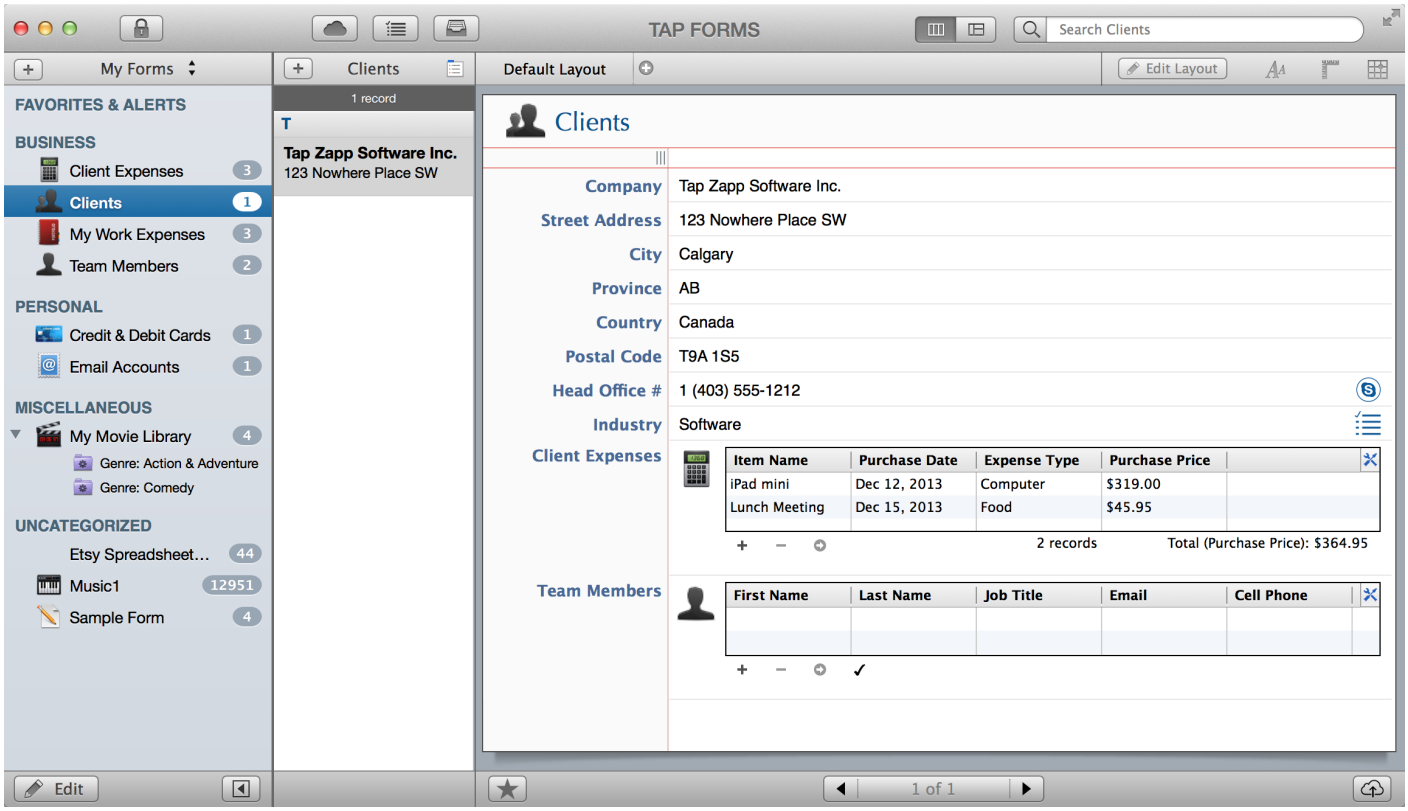


Now add the linked form field to the original Clients form:



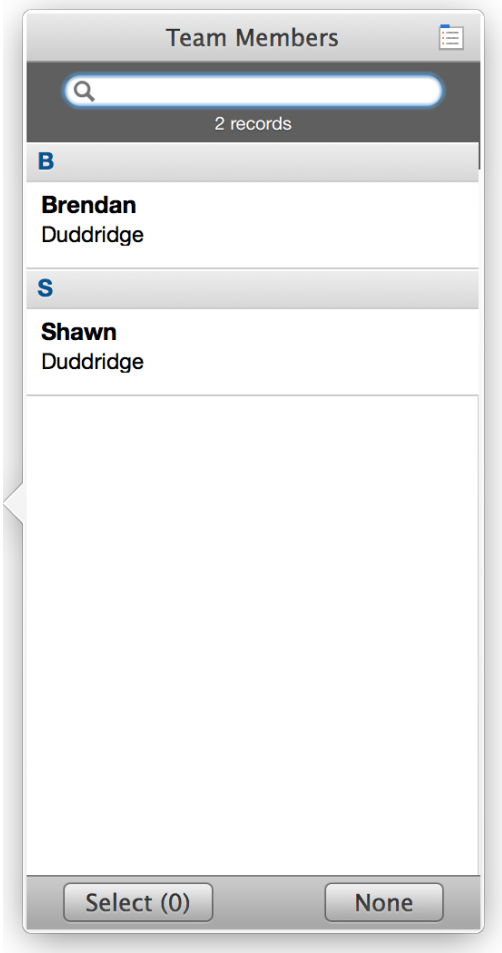
Make sure you click on **Many to Many** for the Link Type and select the Team Members form from the Link to Form property.

Now when you view your Client record the list of Team Members will initially be empty:

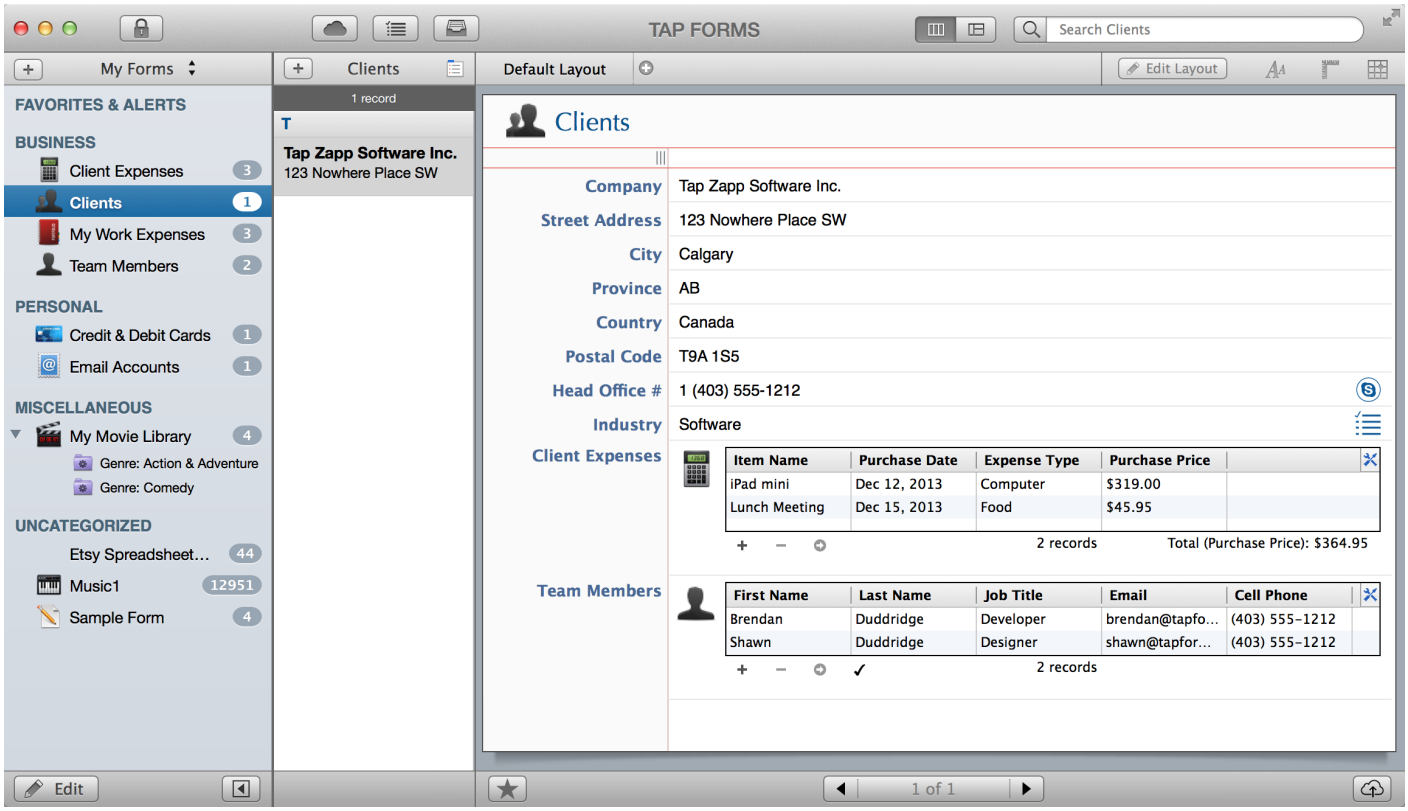


After you've added some Team Members you'll be able to select from the list of Team Members by clicking on the checkmark button just below the linked field.

This will display a popover with a list of child records which haven't yet been linked to your parent record.



Select one or more records from the popover and then click the Select (#) button.



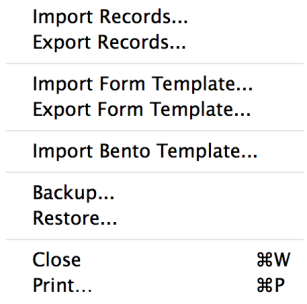
The list of linked records will update to show the records you've previously selected and the records you've just selected.

And that's the difference between a **One to Many** and a **Many to Many** Link to Form field.

Menu Commands

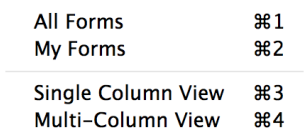
Tap Forms gives you the ability to perform a variety of commands on forms, records, and layouts. For example, you can delete a form, duplicate a form, share a form template with others, and import a form template you've been given by others. You can create new records, delete records, duplicate records.

File



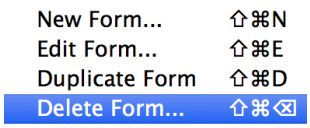
The File menu contains a variety of commands for exchanging your data with others. It contains commands for importing records, exporting records, importing form templates, exporting form templates, importing Bento templates, backing up your database, restoring your database and printing your forms. Other topics in this guide will go through each of these options in detail.

View

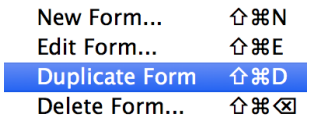


The View menu lets you switch between different views. You can switch between the All Forms and My Forms lists of forms and between the Single-Column and Multi-Column records list views.

Forms



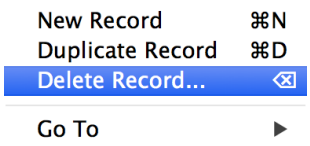
To delete a form, select a form and click the Forms menu. Then select the Delete Form command.
When you delete a form, Tap Forms will delete all of the records and all of the photos and files associated with the records in the form.



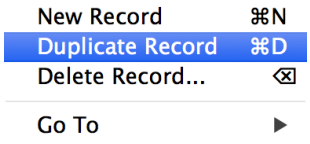
To duplicate a form, select a form and click the Forms menu. Then select the Duplicate Form command.
When you duplicate a form, Tap Forms duplicates just the form template, not any of the records.

You can also access these commands by right-clicking on the selected form in the My Forms or All Forms list.

Records



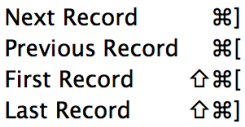
To delete a record, select a record and click the Records menu. Then select the Delete Record command.
When you delete a record, Tap Forms will delete all of the photos and files associated with the selected record.



To duplicate a record, select a record and click the Records menu. Then select the Duplicate Record command.
When you duplicate a record, Tap Forms will duplicate all of the photos, drawings, and audio recordings associated with the record. File Attachments will not be duplicated at this time.

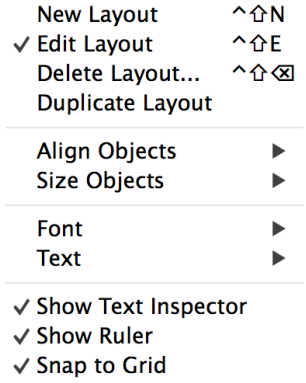
You can also access the Duplicate and Delete commands by right-clicking on the selected record.

Go To



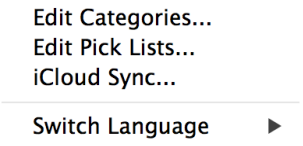
You can use the keyboard to quickly navigate between records. Command-] will move to the next record. Command-[will move to the previous record. Command-shift-[will move to the first record. And command-shift-] will move to the last record in your form.

Layout



The layout menu provides a variety of commands for managing your custom layouts. From here you can edit layouts, duplicate layouts, delete layouts and perform a variety of commands on items in your custom layouts.

Tools



The tools menu just gives you an alternate way of gaining access to the Pick Lists popover, the Categories popover, and the iCloud Sync popover. You can also access the Switch Languages function here.

Switch Language

- Danish
- Dutch
- English
- Finnish
- French
- German
- Italian
- Japanese
- Norwegian
- Polish
- Russian
- Spanish
- Traditional Chinese
- Turkish

Tap Forms supports a variety of languages. By selecting a language here, Tap Forms will translate the built-in forms and fields into the language selected. Regular user interface items such as menus, buttons and other text in Tap Forms will display automatically based upon your computer's language setting. Tap Forms only supports the languages listed here.

— Relationships