

User Guide

Forms R-4.4



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1. About this Guide

1.1. Document History

Product Version	Release Date	Description
Forms 4.4	June 7 th , 2019	First Release of the document

Note: The Product Version section reflects the BDB Platform release version.

1.2. Overview

This guide covers:

- General Workflow of Forms plugin.
- Description of credited Forms options.
- Description of Context Menu Operations for a Published Form.

1.3. Target Audience

This guide aims at all skill level business users, HR Executives, and peers who use some forms to deal with their employees, customers, and staff members to collect various information or feedbacks for gaining significant business insights.

2. Introduction

2.1. Introducing the Forms Plugin

BDB introduces the Forms plugin to make Form creation process a breeze. Effortlessly create customized and secured web forms for various objectives, publish them on the BDB Platform, share them with your targeted audience, and collect responses to analyze the input within a few minutes. The Forms plugin aims to help the end users identify the key factors for their business development based on the real-time inputs taken from their business stack holders.

2.2. Supported Web Browsers

The BDB Platform is a web browser-based application. The users can run the BDB Platform and its various plugins on the below given versions of the browsers:

Mozilla Firefox/ Firefox ESR	Latest Version
Microsoft Internet Explorer	11
Microsoft Edge	Latest Version
Apple Safari	10
Google Chrome	Latest Version (recommended web browser)



3. Getting Started with the BDB Forms

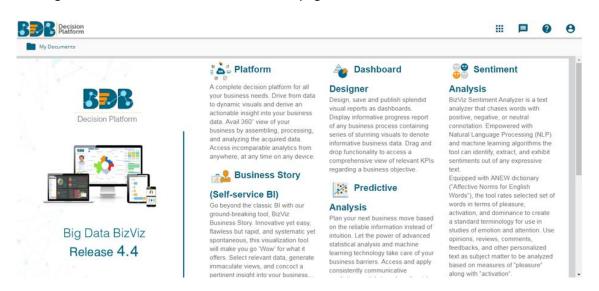
3.1. Accessing the Forms Plugin

This section explains how to access the BDB Platform and a variety of plugins that it offers:

- i) Open BDB Enterprise Platform Link: https://app.bdb.ai
- ii) Enter your credentials to log in.
- iii) Click the '**Continue**' option.



- iv) BDB Platform homepage opens.
- v) Users get redirected to the BDB Platform homepage.

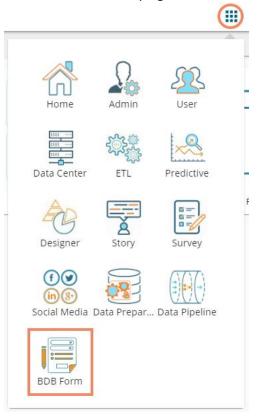


Note:

- a. The above screen opens only for those newly created users who have not yet created any document using the BDB Platform.
- b. If the user has created some documents previously, then the Platform homepage opens displaying the '**My Documents**' page by default.
- vi) Click the 'Apps' 🛄 icon.



- vii) All the available plugin applications get displayed.
- viii) Select the '**BDB Form**' plugin.



ix) The Forms landing page opens.

Forms			• Connected
		Search	۹ (+)
	To create form please click on '+' icon		

3.1.1. Forgot Password Option

Users are provided with a choice to change the password on the Login page of the platform.

- i) Navigate to the Login page.
- ii) Click 'Forgot your password?' option.





Email *	
Password *	
Auth Type	
Enterprise	•
	Forgot your password ?
Continue	

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- iii) A new window opens.
- iv) Provide the email id that is registered with BDB to send the reset password link.
- v) Click the '**Continue**' option.



Having trouble signing in?

To reset your password, enter the email address you use to sign in to BizViz. This can be your email address associated with your account. Email *

admin@bdb.ai

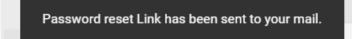
Sign in

Continue

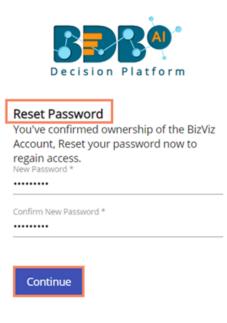
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vi) Users may be redirected to select a space in case of multiple spaces under one server link(They need to select a space and click the 'Continue' option once again). If users do not have multiple spaces then, a message appears to notify the user that about the password reset link (The users receive the reset link via their registered email.)



- vii) Click the link from your registered email.
- viii) Users get redirected to the 'Reset Password' page to set a new password.
- ix) Set a new password.
- x) Confirm the newly set password.
- xi) Click the 'Continue' option.



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xii) The password for the selected BDB account gets reset.

3.1.2. Force Login

The '**Force Login**' functionality has been introduced to control the number of active sessions up to three. The users can access only 3 sessions at a time when they try to access 4th session a warning message displays to inform that the user has consumed the permitted sessions and a click on the '**Force Login**' would kill all those active sessions.

- i) Navigate to the BDB Platform Login page.
- ii) Enter the valid credentials to log in.
- iii) Click the '**Continue**' option.





- iv) The user gets the following message if the user already consumes the permitted active sessions (3 sessions at a time).
- v) Click the 'Force Login' option.

C ≜ Secure	https://app.bdbizviz.com/home/#/max-users	er Q ☆ 😕
	Welcome	
	to BDB Decision platform	
	Big Data Pipeline Framework	BRR@"
	Dashboard Designer	Decision Platform
	ETL (Self-Service Data Preparation)	
	Geospatial Analysis (Location Intelligence)	Permitted sessions are already consumed. Do you want to force login? It will kill all the active
	Predictive and Prescriptive Workbench	sessions.
	Play (Beta Release)	Cancel Force Login
	Self-Service BI (Business Story)	
	Social Media Browser	
	Sentiment Analysis	
	Survey	
		Copyright © 2015-2019 BDB (BizViz Technologies Pvt Lt

- vi) A warning message appears that the currently active sessions get killed for the user and the user has redirected to the log in a page of the BDB Platform.
- Note: The user can successfully login to the BDB Platform after selecting the '**Force Login'** option to log in the platform.



4. General Form Workflow

4.1. Creating a Form

The user can follow the below given steps to create a new form.

- i) Navigate to the Form landing page.
- ii) Click the 'Create Form' icon.

1	Forms	• Connected
	Search	2+
	To create form please click on '+' icon	

- iii) The 'Create Form' window opens.
- iv) Form name: Provide a title for the Form
- v) Form Instruction: Insert a Form Instruction for all the users who access the Form
- vi) Form Logo: Attach an image to be used as Form logo (The image file should be less than 50 KB)
- vii) Click the 'Save' option

Create Form	×
4 Form Name * Sample Form	
5 Form Instruction	
O Source D Q 南 B X h C C C C C C + → Q F	
B I U S X₂ X² I _x ≟ ∷ ﷺ 19	$\Omega \equiv \Omega$
Styles • Normal • Font • Size • A·	
Please answer all the mandatory questions.	
6 Form Logo	
280x100.png	
7 Save	Cancel

- viii) A success message appears. (The users can click the '**Ok**' option to close the pop-up message window)
- ix) The newly created form gets added to the Form Landing page.

	Forms		
9	BBB	8 Form is created successfully	Ok
	Sample Form		



x) The user gets redirected to the landing page of the newly created form to add a new page (by default).

Forms					Conne	ected	0
÷	10 Sample Form 🖌		(+	Page	۵	٠	0
	Page 1	+	:	^			

Note:

- a. The user needs to click the newly created Form tile to open the Form landing page. (it opens by default for the first time after creation).
- b. The inserted Form Instruction appears by default in a pop-up window while opening that form in the preview mode (as shown in the below image). Click the '**Go to form**' option to access the form content and give a response.

Forms				•	Conne	ected	11
← 🗔 Sample Form			Ţ	۵	۵	1	0
Page 1				Т			
Select your Mai Fen Attach the Mai	Form Instruction ×						
Fen	GO to form						

4.2. Listing a Form

The place where a newly created Form is listed is termed the 'List Form' page as it lists all the created/saved Forms by a user.

- i) Navigate to the Form Landing page.
- ii) All the created form tiles get listed over here.
- iii) The user can search for a specific form by using the Search Bar.

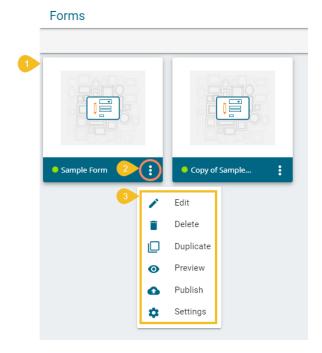
Forms				Connected	53
			Search	۹	+
• Sample Form	Copy of Sample				



4.2.1. Form Options

Each created Form gets credited with various options to edit, duplicate, preview, publish and delete it. The Form Options context menu also display Settings options for the created Forms.

- i) Select a Form from the Form List page.
- ii) Click the '**Options**' icon using the Form tile.
- iii) All the available options for a Form gets listed in a context menu.



iv) The user can select a specific option from the context menu to open and apply it on the selected Form.

4.2.1.1. Edit

The user can edit the Form information by using this option.

i) Click the 'Edit' option from the Options Context menu.





- ii) The 'Edit Form' window appears.
 - a. Edit the following information for the selected Form.
 - i. Form name
 - ii. Form Instruction
 - iii. Form Logo
 - iv. Click the 'Save' option.

Form Instru	ction				
		x 6 ê ê			
		1 = 1 = 1 = 1 = 1 = 1 = 1 = 1 = 1 = 1		9 cz 🍽 🔝	
Please fill	ll the mandator	y information in t	he form.		
div p					

- iii) A success message appears to assure that the selected form has been edited.
- iv) Click '**Ok**' to remove the message.



v) The selected form gets edited.

4.2.1.2. Delete

Follow the below given steps to delete a form from the Form List:

i) Select the '**Delete**' option from the Options Context menu.



Sample Form		
	/	Edit
1	Î	Delete
		Duplicate
	0	Preview
	•	Publish
	۵	Settings

- ii) A pop-up window appears to assure the action of deletion.
- iii) Click the '**Yes**' option using the pop-up window.

s form?	
Yes	No
S	

iv) The selected Form gets removed from the Form list.

4.2.1.3. Duplicate

The user can create a duplicate form by using this option.

i) Select the '**Duplicate**' option from the Options Context menu.



Sample Form		
	/	Edit
	Î	Delete
1		Duplicate
	0	Preview
	۵	Publish
	۵	Settings

- ii) The Duplicate Form window opens.
 - a. The Form name appears with the '**Copy of**' prefix. (E.g., the form with name *Sample Form* becomes *Copy of Sample Form*. The form name can be changed as per the user's choice.)
 - b. The user can edit the Form information.
 - c. The user can change the Form Logo.
 - d. Click the 'Save' option.

F (Duplicate Form Form Name * Copy of Sample Form Form Instruction	>
	Porministruction ② Source □ Q 商 ■ ※ □ 億 億 ◎ ← → Q 票 B I U S ×₂ ײ I _x 注 := 征 症 ?? 主 主 三 · ¶ ¶ ↓ ◎ ◎ ■ ဩ 亜 를 9 Styles - Format - Font - Size - <u>A</u> - ⊠-	Ω
	Please fill all the mandatory information in the form.	
Þ F	Form Logo	
	6 Save Cance	el

- A success message appears to inform that the selected form has been copied successfully.
 (Click the 'Ok' option to remove the message.
- iv) The duplicated/copied form gets added to the Form list page.



	Form is copied successfully Ok

Note: **Preview**, **Publish**, **Form Settings** Options are explained respectively under the **4.4**, **4.5**, and **4.7** sections of this document.

4.3. Form Page Component

This section aims at describing the various components provided on the page.

- i) Click on the Form tile to open the page component.
- ii) Click the 'Add New Question' icon.

Forms				• Connected
÷		Sample Form 🖍	(+ Page	•) 🗅 🌣 💿
	Page 1		(+) : ^	
			Add New Quection	

iii) A success message appears, and a new question gets added to the Form.

Sample Form 🖍					(+)
Page 1	Question added succ	cessfully Ok)	ave Questions	- : ^
Question		ct Answer Type	Display Name	Field Identifier * 156041113397	78 🔁 :
1. option 1					
+ Add option					
			s	ave Questions	· :

- iv) Provide the following information to develop a question:
 - a. Question: Insert the question text in the given field.
 - b. Select Answer Type: Select an answer type using the drop-down menu
 - i. The following Answer Types options are provided:
 - 1. Text Box
 - 2. Number
 - 3. Dropdown
 - 4. Radio Button



- 5. Checkbox
- 6. Date
- 7. Time
- 8. Multi-Select Drop-down
- 9. Test Area
- 10. HTML Editor
- 11. Attachment
- 12. Email
- 13. Password
- 14. Multiple Choice Grid
- 15. Checkbox Grid
- 16. Nested (add an existing form, page, question to the current question)
- b. Display Name: Displays the inserted question text.
- c. Field Identifier: Data in Forms are stored in JSON format. The Field identifier is a key, and answers are valued; it helps to extract the required data from the DB.
- d. Option: Provide relevant option
 - i) Use the 'Add option' button to add more options
 - ii) Use the 'Add other option with input' after adding more than 2 options.
- e. Click the '**Question Save**' **c** icon to save the question information.

Page 1	Save Questions + : ^
Question Select your gender	2 Select Answer Type 3 Display Name 4 Field Identifier * 7 B
option 1 Male	×
option 2 Female	×
5 + Add option 6 + Add other option with input	
	Save Questions +

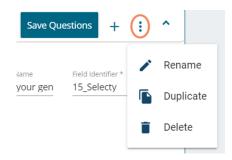
f. A success message appears confirming the action.

Page 1		Question save s	uccessfully	Ok	Sav	e Questions	+	:	1
			:::						
Question	and the second s		Select Answer Type		Display Name	Field Identifier	*	_	
Select your gender			Checkbox	-	Select your gende	15_Selecty		8	
option 1									
Male		×							
option 2 Female		×							
		^							
Add antion Add	other option with	innut							
+ Add option + Add	other option with	input							_
					Save	e Questions			
					Save	equestions	+	•	



4.3.1. Page Settings

The users can get the Page Settings icon from the header panel of the page. By clicking the '**Page** Settings' icon 3 settings options for a page get displayed:



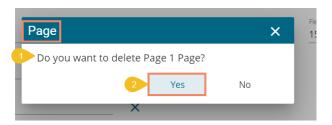
- i) **Rename:** Prompts a new window to rename the selected page.
 - 1. Provide a new name for the page.
 - 2. Click the **'Save**' option.

Rename Page	×
Page Name * Page 1	0
2 Save	Cancel

- 3. The selected page gets renamed.
- ii) **Duplicate:** Prompts to duplicate the selected page.
 - 1. The page name displays with the 'Copy of' prefix (E.g., Page 1 reflects Copy of Page 1.)
 - 2. Click the 'Save' option.



- iii) **Delete:** Prompts to delete the selected page.
 - 1. A new window opens, asking to confirm the action of deletion.
 - a. Click the 'Yes' option if wish to delete the page.
 - b. Click 'No' option if wish not to delete the page.





2. Based on the selected option, the page remains or gets removed.

4.3.2. Question Settings

The users get the '**Question Settings'** icon next to the Question Save icon for the selected question. By clicking the Question Settings icon, 3 settings options for a question get displayed:

•	:	
		Duplicate
	Î	Delete
	\$	Properties

4.3.2.1. Duplicate a Question

The **Duplicate** settings option prompts to copy the selected question.

- 1. Click the 'Duplicate' option from the menu.
- 2. A success message appears to inform the user that the selected question is copied successfully.
- 3. Click the '**Ok**' option to close the message.

Sample Form	· ~ (+ Page
Female	×	
+ Add option + Add other	pied successfully Ok	
Question Select your gender	Select Answer Type Display Name Field Identifier * Checkbox Select your gen 33_Sele	8:
option 1 Male	×	
option 2	€"X	
+ Add option + Add other option with input	t	
	Save Questions +	

4. The copied question gets added below the selected question as mentioned in the below image:



Sa	mple Form 🖌	•				
age 1				Save Questions	+	:
Question Select your gender		Select Answer Type Checkbox	Display Name Select your gender	Field Identifier * 15_Selecty		8
option 1 Male	×					
Iviale	~					
option 2						
option 2 Female + Add option + Add other option with input	×					
Female		Select Anover Type Checkbox	Display Name Select your gender	Field Identifier * 32_Sele		8
Female + Add option + Add other option with input Question Select your gender option 1		Select Answer Type				8
Female Add option + Add other option with input Question Select your gender		Select Answer Type				•

4.3.2.2. Delete a Question

The 'Delete' option from the Question prompts to delete the selected question.

- 1. A new window opens, asking to confirm the action of deletion.
- 2. Click the 'Yes' option if wish to delete the question.
- 3. Click 'No' option if wish not to delete the question.

4. Based on the selected option, the question either remains or gets removed.

4.3.2.3. Question Properties

The Question Properties window displays properties associated with the selected question. The three key tabs that appear on the Question Properties window are:

Properties	2 Condition	3 Lookup	
Placeholder Choose your cou	intry		?
Required:	⊖ Yes	O No	•
Disabled:	⊖ Yes	O No	9
Question Tooltip			2
Error Message			0
Default Value India			•



- a. Properties
 - i. Placeholder: The set placeholder text appears when the answer field is kept empty as displayed in the following image:

ii. Required: Enabling the required option, the question becomes mandatory to be answered. The question gets a '*' mark to indicate the same.

- iii. Disabled: Selecting 'No' option for this field allows the user to upload multiple files for this. By selecting 'Yes' the question disabled for the user to give a response.
- iv. Question Tooltip: Add a tooltip to the right side of this field.

Men	tion your religion. *	
	Placeholder text	0
	*Required	Question Tootip

- v. Error Message: The label provided for this field appears as an error message.
- vi. Prefix Example: Special characters like \$, @, & can be added as a prefix.
- vii. Postfix Example: Special characters like \$, @, & can be added as a postfix.

Error Message Error Message	2
Prefix example \$,@,& \$	0
Postfix example \$,@,& @	0
Default Value	0
Save	Cancel



The preview page describes:

Mer	ntion your religion. *		
	\$ Placeholder text	@	
	Error Message		

- viii. Default Value: The set value becomes the default value for this field, before user interaction. Having a default value overrides the placeholder text.
- ix. Minimum Length: Set minimum length requirement for the field.
- x. Maximum Length: Set maximum length requirement for the field.

ention your religion. *	
\$ default value	@ 13/25

b. Condition

Select the type of conditions you want to add for the selected question.

- i. Navigate to the 'Condition' tab displaying on the Question Properties window.
- ii. Choose a condition out to the below given choices:
 - 1. None
 - 2. Hide Questions
 - 3. Disable Questions
- iii. Click the 'Save' option to save the selected condition.
- iv. The selected condition gets applied to the question.

Questic	n Properties	×
Prope	rties 1 Condition Lookup	
India 2	None	
USA	Hide Questions	
	Disable Questions	
UK	Select condition type 👻 🔮	
Australia	Select condition type 👻 ?	
Save		Cancel



c. Lookup

The Lookup tab allows the user to get a lookup option for the Answer types like Radio Button, Checkbox, Dropdown, and Multi-select dropdown. The lookup option can be a saved response to any of the Textbox type question.

The following steps explain the process to get the Lookup option for a specific question:

- i) Navigate to the Question page selecting a form.
- ii) Make sure you have at least two questions:
 - a. Question 1 with either of the choices given as answer type out of Radio Button/ Checkbox/ Dropdown/ Multi-select dropdown.
 - b. Question 2 with Textbox inserted as the answer type.

Forms			Connected []
÷	Lookup Option 🖍	(•	+ Page) 🛧 🌣 💿
	Page 1	Save Questions + : ^	
تمحر	Overstein Select Answer Type Display Name Select your Religion. Dropdown Select your Religion.	Field Identifier * Iglo 58_Selecty	
	estion 1 Hinduism X estion 2 X		
2	Add option + Add other option with input		
	Question Select Answer Type Mention your religion. Textbox	Field Identifier * eligi 59_Mention 🔁 🖬	

- iii) Open the Question Properties window for Question 1.
- iv) Click the 'Lookup' tab.
- v) Select the 'Yes' option for Lookup.
- vi) Select a question using the drop-down menu.
- vii) Click the 'Save' option to save the Lookup settings.

Question Prope	rties		×
Properties	Condition	4 Lookup	
Lookup:	O Yes	O No	?
Select Question Mention your reli	gion.		6)~
Save			Cancel



viii) Save the questions and publish the form.

÷	Lookup Option 🖌 (+ Page	
	Page 1 Save Questions + : ^	
	Question Select Answer Type Display Name Field Identifier * Bislect your Religion	
	option 1 8 Form × 1. Hinduism Do you want to publish this form?	
	2. Islaam Yes No	
	option 3 3. Christianity	

- ix) Open the responses page for the published form.
- x) See the available options provided for Question no. 1

9	My Documents > Lookup Option >	•	0
	Page 1		=,∕
	Select your Religion.		8
	Islaam Mi Christianity		
	Submit		

xi) Give response for the Question no. 2

My Documents > Lophup Option >	8	0
Page 1		=,
Select your Religion.		8
11 Mention your religion. Buddhism		
Submit		

xii) Save the response.



- xiii) Check the available options for Question no. 1.
- xiv) The response for the Question no. 2 gets added in the lookup.

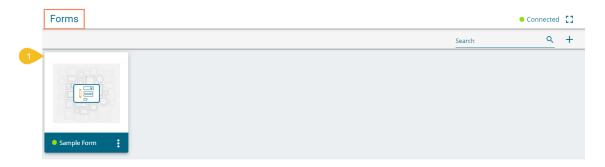


My Documents > Lookup Option >		■ 0
Page 1		=,
13 Select your Religion.	_	8
Hinduism		
Islaam		
Me Christianity		
14 buddhism		
	Submit	

4.4. Form Preview

The users can get a preview of the selected form by clicking the preview icon provided on the landing header page.

i) Choose an existing Form from the list/landing page.



ii) Click the 'Preview' icon from the header panel of the selected form.

	Sample Form 🖍			(+ Pag
Page 1		Save Questions	+ :	^
Question Select your gender	Select Answer Type Checkbox ▼	Display Name Field Identifier Select your gende 15_Selecty		a :
option 1 Male	×			
option 2 Female	×			
+ Add option + Add other option	n with input			
		Save Questions	+ :	

Or

Select the 'Preview' option from the context menu that appears on the Form list.



Sample Form		
	1	Edit
	Î	Delete
		Duplicate
	0	Preview
	6	Publish
	٠	Settings

- iii) The preview screen gets displayed for the selected form (the inserted Form instruction opens by default).
- iv) Click the 'Go to Form' option.

← 🔛 Sample	e Form			Ģ	٥	۵	1	0
	Page 1							
	Select your geno Male Female	ler.						
	Name	Form Instruction × Please answer all the mandatory questions.						
	Address	Go to form						
	Choose your co	untry 👻						

v) The Form content opens in the preview mode.



← 🕅 Sample Form		Ţ.	0	\$ /	0
Page 1					
Select your gender. Male Female					
Name					
Address					
Choose your country					

Icon	Icon Name	Action
	Mobile View	Opens form in the Mobile view
	Tablet View	Opens form in the Tablet view
Ţ	Large Screen View	Opens form in the Large Screen view
•	Publish	Redirects to publish the form
\$	Settings	Redirects to the Form Settings page
-	Form Edit	Redirects to edit the questions and pages
0	Form Instruction	Displays the inserted Instruction message on the screen

4.5. Publishing a Form

The users can publish the forms created by them to the BDB Platform. The published forms can be accessed on the BDB Platform homepage under the '**My Documents**' section.

i) Click the '**Publish**' icon from the header panel of the selected Form.

÷	Sample Fo	m 🖊	+1 🙆 🌣 💿
	Page 1	Save Questions	- : ^
	Question Select your gender	Select Answer Type Display Name Field Identifier * Checkbox ▼ Select your gende 15_Selecty	
	option 1 Male	×	
	option 2 Female	×	
	+ Add option + Add other option with input		
		Save Questions +	• •

Or

Click the Publish option using the Form Options menu.

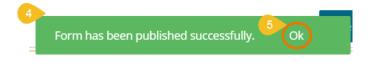




- ii) A pop-up window opens to confirm the action.
- iii) Click the '**Yes**' option to publish the form.



- iv) A success message appears to confirm the action of the publish.
- v) Click the '**Ok**' option to remove the message window.



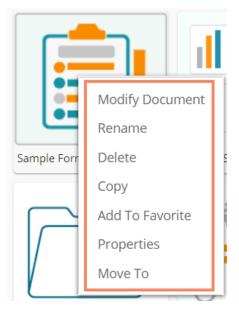
vi) The Published form appears under the 'My Documents' place of the same BDB Platform account.

Decision Platform				III 🖆 🛛 🖯
My Documents >			Search	o 📻 Date 🚦
Shared Documents 6 Sample For	m	Test Story	Sample Story	Published Dashboards
Sample Folder	mple Folder	Business Stories		



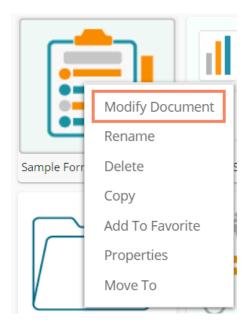
4.5.1. Context Menu Operation (only for Published Forms)

Each published Form is credited with some operations on the BDB Platform. The users can use right-click to access the available Form operations in a context menu.



4.5.1.1. Modifying a Form

i) Select the 'Modify Document' option using the context menu.



- ii) The 'Modify' window opens for the selected form.
- iii) Modify the required information:
 - a. Name of the Form
 - b. Description of the Form
 - c. Click the 'Save' option.



Modify	
Name *	I
Sample Form	I
Description	e
Close Save	
	I

iv) The selected information gets modified.

4.5.1.2. Renaming a Form

- i) Select the 'Rename' option from the context menu.
- ii) A new window opens prompting to rename the Form.
- iii) Provide a New Name for the selected form.
- iv) Click the 'Save' option.

Rename	
New Name *	
Sample Form1	
	2
	Close Save

v) The selected form gets renamed.





4.5.1.3. Deleting a Form

- i) Select the '**Delete**' option from the context menu.
- ii) A message window opens to confirm the action.
- iii) Select the 'Delete' option to delete the selected form.

	Delete	9		
e F	Do you v File ?	want to de	lete selected	en
		Close	Delete	
L		_		

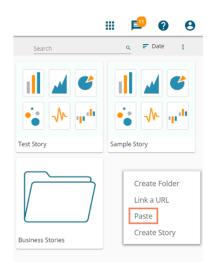
iv) The selected form gets deleted.

4.5.1.4. Copying a Form

i) Select the '**Copy**' option from the context menu.



- ii) Use the right click on another folder or on the blank space to get the 'Paste' option.
- iii) Click the '**Paste**' option.





- iv) The 'Paste' window opens displaying the selected form name with the 'Copy of' prefix.
 E.g., A form named Sample Form 1 gets a new name, 'Copy of Sample Form 1' as shown in the following image:
- v) Click the 'Save' option.



vi) The pasted form gets saved with the new name.

My Documents 🗲			
Shared Documents	MY FORM	Sample Form1	Copy of Sample Form1

4.5.1.5. Adding a Form to Favorite

i) Select the 'Add to Favorite' option from the context menu.



ii) A message appears to assure the success of the action.



My Documents 🗲				Search	o 🖛 Date 🚦
Shared Documents	MY FORM	Sample Form1	Copy of Story Document	Test Story	Sample Story
Published Dashboards	Sample Folder	Document added to fa		Business Stories	

iii) Open the Favorites section.



iv) The selected Form gets added to the Favorites.



- v) Use the right-click on the Form which has been added to the Favorites.
- vi) The 'Remove From Favorite' option appears.

	Remove From Favorite
Cample Form1	
Sample Form1	



vii) The Form gets removed from the Favorites, and a notification message appears stating the same.

Favorites >	••• •••		
Copy of Story Document	Test Story	Sample URL1	Story Document
Copy of Story Document	Test Story	Sample URL1	Story Document
		Document removed free	om favorites!

4.5.1.6. Properties

- i) Select the '**Properties**' option from the context menu.
- ii) The 'Properties' window appears with four options:
 - a. Properties: Displays basic details about the Form creation.
 - i. Click the 'Choose Files' option to upload an image.
 - ii. Click the 'Save' option to save the update.

Properties	×
Sample Form1	
< Properties	Share With User Share With Group Exclude >
Created By:	Will
Kind:	
Where:	My Documents
Created:	Thu Jun 13 2019 15:32:29 GMT+05:30 (India Standard Time)
Modified:	Thu Jun 13 2019 15:32:30 GMT+05:30 (India Standard Time)
Version:	4.4.0
Description:	
Upload Ima	Choose Files No file chosen 2 Save

iii. A message appears to assure about the update.



Image uploaded successfully!

- b. Share With User: The Form gets shared with the selected User
 - i. Select the 'Share With User' option using the Properties window.
 - ii. Select a user or multiple users and move to the space given on the right side.(Use the single arrow icon to move only one user. Use the double arrows icon to move all the users.)
 - iii. Click the 'Save' option.

Properties			×
Sample Form1	Share With User	Share With Group	Exclude >
AdUs ved testUser priya Mahendra karthik Raghvendra Singh BDB	*	Swati S	×
		Close	Save

iv. A success message appears stating that the document privilege is updated.

Document privilege updated successfully!

- v. The Form gets shared with the selected user(s).
- c. Share with Group: The Form gets shared with the selected User Group
 - i. Select the 'Share With Group' option using the Properties window.
 - ii. Select a user group or multiple user groups and move to the space given on the right side.

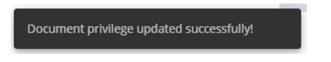
(Use the single arrow icon to move only one user. Use the double arrows icon to move all the users.)

iii. Click the 'Save' option.



Sampi		Share With Us	er Share With	Group	Exclude >
test Pov Per Bizt	ng Group tUserGroup weruser mission Viz Partners mo Viewers ZGroup		UserGroup		Â
ETL	Test	•		Close	Save

iv. A success message appears stating that the document privilege is updated.



- v. The Form gets shared with the selected user group(s).
- d. Exclude the User: The Selected User gets excluded from the rights to access the Form
 - i. Select the 'Exclude User' option using the Properties window.
 - ii. Select a user or multiple users and move to the space given on the right side. (Use the single arrow icon to move only one user. Use the double arrows icon to move all the users.)
 - iii. Click the 'Save' option.

Properties		×
Sample Form1	Share With Group	Exclude User
Avin Jain vidyaPrdBizvizSpace Sandeep Mitra Anoop Mani Rajat Arun Kadandale	Ranjit	
		Close Save



iv. A success message appears, and the document privilege gets updated to exclude the selected users.

Document privilege updated successfully!

4.5.1.7. Moving a Form

This option allows the user to move the Form from one folder or space to another folder.

- i) Select a Form.
- ii) Select the 'Move To' option from the context menu.

	Modify Document
Sample Form1	Rename
	Delete
	Сору
/	Add To Favorite
	Properties
	Move To
Copy of Sample Folde.	

- iii) The 'Move To' window appears displaying the available folders.
- iv) Select a folder.
- v) Click the '**Move**' icon.

Move To		
My Documents		
	Business Stories	>
	Sample Folder	>
•	Published Dashboards	>
•	Copy of Sample Folder	>
	Close	Save



- vi) Users get redirected to the next screen.
- vii) Click the 'Save' option.

Move	То	
← Cop	y of Sample Folder	
	Sample Folder	>
	Published Dashboard	>
	Sample Folder 4.2	>
	Close	Save

viii) A success message appears.



ix) The Form gets moved to the selected space.



Note: To view a Form, use a click on the selected Form.



4.6. Form Response

The Form Response module contains all the responses given by the users in a tabular format. The collected responses can be further filtered by Page, Date, or Users. The users can edit the collected responses as well. The list of responses may change according to the user. The ordinary users get to see the responses given by them while the admin/ owner of the form gets to see all the responses given by all the users. The Form Response page can be used to verify the data.

- i) The Preview page of the Form opens with an option to respond to the question once the Form is published.
- ii) Respond to the question.
- iii) Click the 'Submit' option.

My Docu Copy of Sample Form1 >	8	::
Page 1		=,∕
Select your gender		8
3 Submit		

- iv) An acknowledge message appears to inform that the shared response has been saved.
- v) Click on the link 'Click here to view the response' or 'View Response' = icon.

My Documents > Copy of Sample Form1 >	■ 0
	5 =
4 Response saved successfully Ok	
5 Click here to view the response	

vi) All the collected responses appear in the tabular format.

My Documents > Copy of Sample Form1 >		Ξ. 0
Actions	Select your gender	2
× 1	Female	* =
/ 1	Male	
/ 1	Female	
/ 1	Male	
2 T	Female	

vii) Click the '**Download**' icon to download the responses in an excel file.



	My Documents > Sample Form >			0
	Actions	6 harring and a		2
	Actions	Select your gender		
				- ±
	/ 1	Female		
		- entere		Ŧ
	1	Male		
		Male		
- T				
	🕮 Sample Form's .xlsx 🔷		Show	≀all ×

viii) Click the '**Filter Response**' option to filter the responses. The user gets 3 options to filter the responses: 1. Page, 2. Date and 3. Users

a. Filtering Responses by Page

- i. Select the 'Page' tab.
- ii. Select a page using the drop-down menu.
- iii. Click the '**Apply**' option.

Response Filter				×
1 Page	Date	Users		
Select Page				
Page 2	•			
			3 Apply	Cancel

iv. The responses get filtered by the selected page.

My Documents > Sample Form		
Actions	Email ID	∠
× 1		*
× =	willaimmart@getmail.com	₹
2 T	dalsybrown34@getmail.com	
2 T	willmark@xyz.com	

b. Filtering Responses by Date

- i. Select the 'Date' tab.
- ii. Provide a Start Date.
- iii. Provide an End Date.
- iv. Click the 'Apply' option.



Response Filter				×
Page	1 Date	Users		
2 Start date	3 End date			
19-06-2019	20-06-2019			
			4 Apply	Cancel

v. The responses get filtered by the selected dates.

• M	ly Documents 👂 S	ample Form						9
Actio	ins	Select your gender.	Name	City	Choose your country	Contact Number	Email ID	
1	ĩ	Female						
1	•	Male	William Martin	New York	USA	23232423343	willaimmart@getmail.com	
1		Female	Daisy Brown	San Francisco	USA	545084080	daisybrown34@getmail.com	
1		Male	Mark Willson	San Diego	USA	43433433	willmark@xyz.com	

c. Filtering responses by Users

- i. Select the 'Users' tab.
- ii. Select a user using the drop-down menu.
- iii. Click the 'Apply' option.

		×
Date	1 Users	
	Apply	Cancel
	Date	

iv. The responses get filtered by the selected user.

My Documents > QA FORM			
Actions	What is your name?	Give your mail id?	∠
× 1	Archana Kumari	archana.ms@bdb.ai	±

Note: It is mandatory to publish a Form to get responses.

4.7. Form Settings

The users can set required settings or change them using this Form option.

- i) Select the 'Settings' option from the Options Context menu.
- ii) The 'Form Settings' window opens with the following tabs:
 - a. Properties



- b. Theme
- c. Form Instruction per user
- iii) Click the 'Save' option to reflect the altered settings in the selected Form.

Form Settings		>
Properties 2 Theme 3	Form Instruction per user	
Status: Calle Enable		
Configurations:	Choose a form expiry date	с
Expiry Date:	dd-mm-yyyy:	
Total number of response:	Enter total no of response	
	Value must be a number, not in decimal/float	
Per user response:	Enter no of response per user	
Do you want to show the page list to all users?	Value must be a number, not in decimal/float Display Page List Don't show	
Do you want to show the question group in collapse-expand panel?	◯ Yes ◯ No	
<u> </u>		

4.7.1. Properties

The users can set or alter various Form properties using the Properties tab displayed under the Form Settings option. This section explains all the listed Form properties.

4.7.1.1. Status

The Properties tab provided under 'Form Settings' displays a radio button to enable or disable status of the Form content.

- i) Open the Properties Tab using the 'Form Settings' option. (It opens by default while selecting the 'Form Settings' option.)
- ii) The Enable/Disable radio button appears.

Form Settings		• Conn	ected
Properties	Theme	Form Instruction per user	
Status: 🛑 Enable			
Configurations:		Choose a form expiry date	(
Expiry Date:		dd-mm-yyyy:	
Total number of res	sponse:	Enter total no of response	
		Value must be a number, not in decimal/float	
Per user response:		Enter no of response per user	
Do you want to sho	w the page list	Value must be a number, not in decimal/float Display Page List	
to all users?		Don't show 🔻	
Do you want to sho group in collapse-e		O Yes O No	
<u> </u>		Corm Fatar O Decasara	
Save			Cano



iii) By disabling this option, all the properties fields disappear.

F	Form Settings			×
	Properties	Theme	Form Instruction per user	
3	Status: Disable			
4	Save			Cancel

iv) The Form content gets disabled, so the user can't give a response to any of the question.

Sai	nple Form 🖌 🔹 💠
Page 1	Save Questions + : ^
Guestion Select your gender Male Female + Add option + Add other option with Inpu	Setect Answer Type Disates Same Field Stentifier * Checkbox Select your gender 15_Selecty Image: Checkbox X X
Outston Attach the relevant document.	Select Answer Type Disslar Name Field Identifier * Checkbox • Attach the relevant 32_Attacht 🗈 🗄

4.7.1.2. Configurations

The users can configure the various Form properties using the Configuration field.

- i) Access the 'Configurations' fields mentioned under the Properties tab
- ii) Configure the following information:
 - a. Expiry Date: Set form expiry date using the drop-down icons. Insert expiry time for the Form manually.
 - b. Total number of response: Set a limit to collect responses
 - c. Per-user response: Set a limit for a user to give maximum responses
 - d. Do you want to show the page list to all users?: Select an option using the drop-down menu (Don't Show/ Show Dropdown on right Side/ Show List on Left Side)
 - e. Do you want to show the question group in the collapse-expand panel?: Choose an out of '**Yes**' or '**No**' options.



- f. Default View Mode: Set a default view for the Form plugin out of 'Form Entry' or 'Response' options.
- g. Click the 'Save' option to save the configurations.

1 Form Settings		×
2 Properties Theme	Form Instruction per user	
3 Configurations: Expiry Date:	Choose a form expiry date 19-06-2019 12:00 ×↓↓▼	C
Total number of response:	Enter total no of response	
Per user response:	Enter no of response per user	
Do you want to show the page list to all users?	Value must be a number, not in decimal/float Display Page List Don't show	
Do you want to show the question group in collapse-expand panel?	• Yes O No	
Default view mode	Form Entry O Response	
4 Save		Cancel

Note: The users get the following messages to notify various Form settings when the condition is fulfilled.

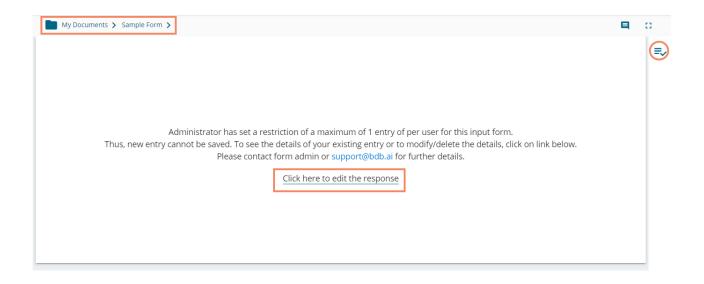
- 1. When the 'Total Set Number of Response(s)' is entered.
 - a. The user can view the entered responses using the 'View Response' \equiv icon.
 - b. The user can edit the response by clicking the 'Click here to edit the response' option.
 - c. The user needs to contact the support team/ admin to get further details on the same.

My Documents > Sample Form >	E 0
	=
Administrator has set a restriction of a maximum of 3 entry for this input form. Thus, new entry cannot be saved. To see the details of your existing entry or to modify/delete the details, click on link below. Please contact form admin or support@bdb.ai for further details.	
Click here to edit the response	

- 2. When Per user-set limit of the responses is reached.
 - a. The user can view the entered responses using the 'View Response' $\stackrel{=}{\Rightarrow}$ icon.
 - b. The user can edit the response by clicking the 'Click here to edit the response' option.

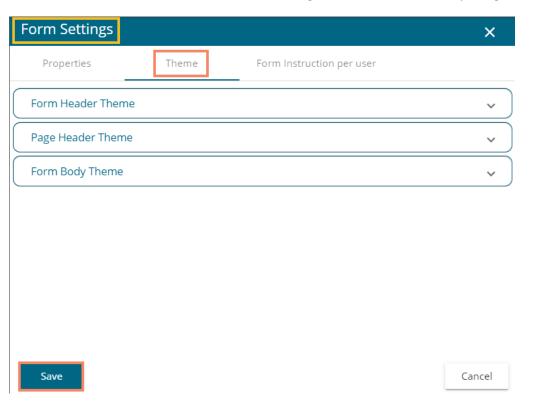


c. The user needs to contact the support team/ admin to get further details on the same.



4.7.2. Theme

The users can set themes for the Form Header, Page Header, and Form Body using the Theme tab.



The following points attempt to explain the details about each section provided under the Theme tab.

5. Form Header Theme



- a. Alignment: Set header alignment out of the options provided in the drop-down menu (Left/Center)
- b. Font Variant: Choose a variant type out of the options provided in the drop-down menu (Normal/Small Caps)
- c. Font Style: Set Font style out of the options provided in the drop-down menu (Normal/Italic)
- d. Font Weight: Select a Font weight option out of the given choices in the drop-down menu (Normal/Bold)
- e. Font Size: Set the font size by entering a number
- f. Background Color: Choose a color to be applied for the Form Header background using the color menu
- g. Font Color: Choose a font color using the color menu
- h. Click the 'Save' option to save settings for the Form Header

Properties 2 The	Form Instruction per user	
Form Header Theme		^
Alignment:	Header Alignment Left	Ŧ
	Font Variant	
Font Variant:	Normal	•
Font Style:	Font Style Normal	-
Font Weight:	Font Weight Normal	T
Font Size:	Font Size 16	
Background Color:		
Font Color:		

6. Page Header Theme

- a. Alignment: Set the page header alignment out of the options provided in the drop-down menu (Left/Center/Right)
- b. Font Variant: Choose a variant type out of the options provided in the drop-down menu (Normal/Small Caps)
- c. Font Style: Set Font style out of the options provided in the drop-down menu (Normal/Italic)
- d. Font Weight: Select a Font weight option out of the given choices in the drop-down menu (Normal/Bold)
- e. Font Size: Set the font size by entering a number
- f. Background Color: Choose a color to be applied for the Page Header background using the color menu
- g. Font Color: Choose a font color using the color menu
- h. Click the 'Save' option to save settings for the Form Header



Properties 2 Theme	Form Instruction per user	
Page Header Theme		
	Page Alignment	
Alignment:	Left	
	Font Variant	
Font Variant:	Normal	
	Font Style	
Font Style:	Normal	
	Font Weight	
Font Weight:	Normal	
	Font Size	
Font Size:	16	
Background Color:		
Font Color:		
Pont Color.		

7. Form Body Theme

a. Question Theme Properties

- i. Font Variant: Choose a variant type out of the options provided in the drop-down menu (Normal/Small Caps)
- ii. Font Style: Set Font style out of the options provided in the drop-down menu (Normal/Italic)
- iii. Font Weight: Select a Font weight option out of the given choices in the drop-down menu (Normal/Bold)
- iv. Font Size: Set the font size by entering a number
- v. Question Left Border: Select and apply color for the left side border of the question.

Form Settings		×
Properties 2 Theme	Form Instruction per user	
3 Form Body Theme		^
4 Question Theme Properties:	Font Variant	
Font Variant:	Normal	-
Font Style:	Font Style Normal	*
Font Weight:	Font Weight Normal	•
Font Size:	Font Size 15	
Question Left Border:		
5 Save		Cancel

b. Answer Option Theme Properties

i. Font Variant: Choose a variant type out of the options provided in the drop-down menu (Normal/Small Caps)



- ii. Font Style: Set Font style out of the options provided in the drop-down menu (Normal/Italic)
- iii. Font Weight: Select a Font weight option out of the given choices in the drop-down menu (Normal/Bold)
- iv. Font Size: Set the font size by entering a number

Form Settings		×
Properties 2 Theme	Form Instruction per user	
3 Form Body Theme		^
Answer Option Theme Properties:	Font Variant	
Font Variant:	Normal	-
Font Style:	Font Style Normal	•
Font Weight:	Font Weight Normal	•
Font Size:	Font Size 15	
5 Save		Cancel

Note: There is a single '**Save**' option provided for all the 3 Form Settings tab. The user needs to click the '**Save**' option to save the changes, even though they are related to a single settings tab.

4.7.3. Form Instruction per user

The user can insert Form Instruction for a specified user. The instruction gets displayed only for the selected user while opening the preview screen.

- i) Navigate to the 'Form Settings' page.
- ii) Click the 'Form Instruction per user' option.
- iii) Select a user using the drop-down menu.
- iv) Insert a specific instruction in the given space.
- v) Click the 'Save' option.

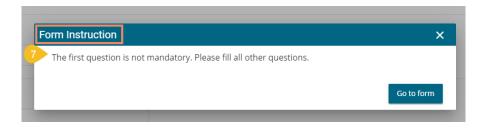
E Ξ Ξ Ξ [] ¶.	
E Ξ Ξ Ξ [] ¶.	select User pa@bdb.ai
• <u>A</u> • A•) Source D Q ब B X و
	$\mathbb{B} \ I \ \underline{U} \ 5 \ \mathbf{x}_{2} \ \mathbf{x}_{1} \mid \underline{I}_{\mathbf{x}} \mid \underline{I}_{\mathbf{x}}$
ll other questions.	Styles - Normal - Font
	he first question is not manda



vi) A success message appears. Click 'Ok' to close the message.



vii) Access the Form preview page from the User account for which the instruction is inserted. The specified instruction appears.



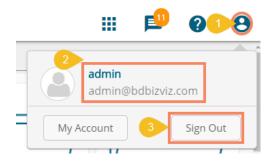
5. Signing Out

It is possible for a user to log out from the BDB Form plugin at any given stage. Users need to click on the '**Close**' × option to close the Form page.

📙 8D8: Decision Platform x 🔓 8D8: Decision Platform 🛛 🔀 BD8: Decision Platform x 🛨		x
← → C 🌲 https://app.bdb.ai/forms/main-index.html	० 🕁 😆) :
👬 Apps 🗳 YUJAA: platform 📀 BDB: Decision Platf 🎽 BDB: Decision Platf 🎽 BDB: Decision Platf		
Forms	• Connected	3
	Search Q -	+
– To create form please click on '+' ic	on	

The following steps describe how to log out from the BDB Platform.

- i) Click the '**User**' icon Θ on the Platform homepage.
- ii) The details of the logged in user appears.
- iii) Click the 'Sign Out' option.



iv) The user successfully signs off from the BDB Platform.

Note: By clicking the 'Sign Out' option, the user gets back to the Sign in page of the BDB platform.