

User Guide

Forms R-4.5



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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
Forms 4.5	July 5 th , 2019	Updated 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 Edge	Latest Version
Apple Safari	10
Google Chrome	Latest Version (recommended web browser)



3. Getting Started with the BDB Forms

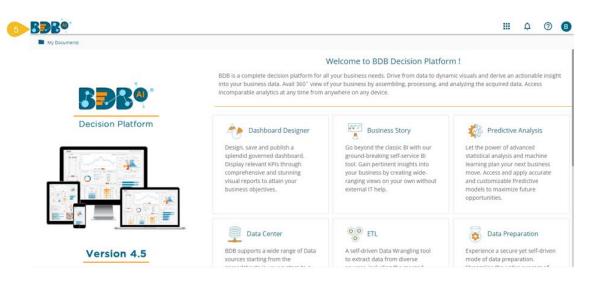
3.1. Accessing the Forms Plugin

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.
- iii) Select an Auth type from the drop-down menu.
- iv) Click the 'Sign In' option.

← 1	॰ @ ☆ 🛎 :
🔡 Apps 🧳 YUJAA: platform 🚳 BDB: Decision Platf 🎁 BDB: Decision Platf 🎁 BDB: Decision Platf	
Image: Section 10 and Section 10 an	Email* bdb.ai Password * Auth Type Enterprise Forgot Password ?
Data Engineer Visualisation Engineer	Copyright © 2015-2019 BDB (BizViz Technologies Pvt Ltd)

v) BDB Platform homepage opens.



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 'Form' plugin.



ix) The landing page of the Forms plugin opens.

Forms		 ¢	L	?	В
Forms	Search			Q	+
	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.





bdbuser@bdb.ai	
Password *	
Auth Type	
Enterprise	*
1	Forgot Password ?
Sign In	

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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.



Forgot Password?

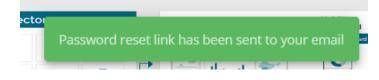
Please enter the registered email address to reset your password.

Email *	
bdbuser@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.



Reset Password

You have confirmed ownership of the BDB account. Please reset your password to get access.

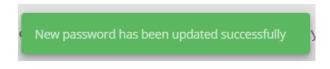
New Password *

Confirm New Password *



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xii) The password for the selected BDB account gets reset, and the user receives a notification to assure them.

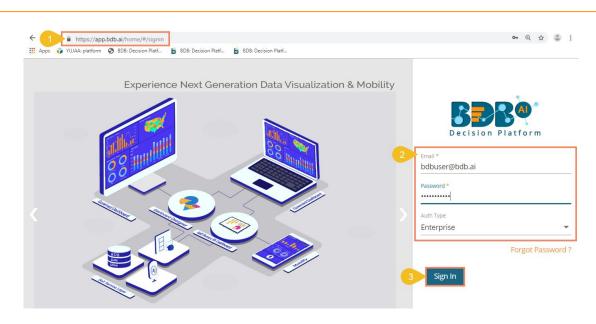


3.1.2. Force Login

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	아 및 ☆ 😨
	Welcome	
	to BDB Decision platform	
	Big Data Pipeline Framework	B R A
	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 8DB (BizViz Technologies Pvt Ltd)

- vi) A warning message appears that the currently active sessions get killed for the user and the user gets 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 Workflow for Forms

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.

	BBB®		¢	? B
1	Forms	iearch		<u> </u>
	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.

3 Create Form	x
4 Form Name * Sample Form	
5 Form Instruction	
O Source D Q ■ B X □ ■ ■ □ ■ □ ■	
B I U S ×₂ ײ I _x ≔ ≔ ⊕ ⊕ >> = = = →¶ ¶ (∞ ∞ № ⊡ ⊞ ≣ (2
Styles - Format - Font - Size - A- A-	
6 Form Logo	
280x100.png	K)
7 Save Cance	2

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	Sample Form	8 Form is created successfully
	Sample Form	

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



10 Sample Form 🧹		(+ Pa	age) 🛧 🌻 📀
Page 1 +	÷	^	
	10 Sample Form > Page 1 +	10 Sample Form 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.

BBB®		↓ ⑦ ₿
← 🔐 Sample Form	0 🖵 🖉	s 🕈 🗡 🛛
Page 1		
Form Instruction	×	
Please fill all the mandatory information in th	ne form.	
	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/copied Forms by the 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.

I	Forms		Search	٩	+
ſ					
l					
l	BPR [®]	BBB®®			
L					
	• 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 get 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.

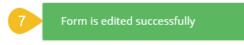


- ii) The 'Edit Form' window appears.
 - a. Edit the following information for the selected Form.
 - i. Form name
 - ii. Form Instruction
 - iii. Form Logo
 - iv. Click the 'Save' option.



Form Instr	ction					
Source			• → Q, 厘			
В <u>I</u>	$\mathbf{S} \times_{\mathbf{z}} \mathbf{x}^{\mathbf{z}} \mid \mathbf{I}_{\mathbf{x}} \mid \mathbf{I}_{\mathbf{z}}$:= == = ,,	2 2 3 3	▶¶ ¶∢ ©	r 🖻 🖪 🖬	∎ ≣
Styles	• Normal • Font	- Size	• <u>A</u> • A•			
Please fill	all the mandatory info	rmation in the f	form.			
div p						

iii) The selected Form gets edited a success message appears to assure the same.



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.

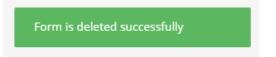


- ii) A pop-up window appears to assure the action of deletion.
- iii) Click the '**Yes**' option using the pop-up window.



Form			×
Do yo	ou want to delete th	his form?	
		Yes	No

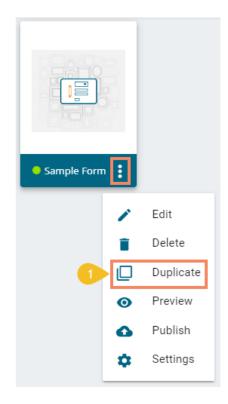
iv) The selected Form gets removed from the Form list, and the action gets communicated through a message.



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.



- 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.



D	Duplicate Form
	iorm Name * Copy of Sample Form
F	Form Instruction
	O Source D
	$\begin{array}{c c c c c c c c c c c c c c c c c c c $
	Styles - Format - Font - Size - A.
	Please fill all the mandatory information in the form.
F	Form Logo

- iii) A success message appears to inform that the selected form has been copied successfully.
- iv) The duplicated/copied form gets added to the Form list page.

Forms		
BBB@"	BBB@	7 Form is copied successfully
• Sample Form 8	• Copy of Sample.	

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 (Page 1 opens by default).
- ii) Click the 'Add New Page' icon.

BBB®®						4 ¹¹ (?)	W
÷	Sample Form	1 🖌			+ Page	•	0
	Page 1		Save Qu	estions +	Add New Page		
	Question Select your gender.	Select Answer Type Checkbox 👻	Display Name Select your gen	Field Identifier * 174_Select	8:		
	option 1 Male option 2	×					
	Female	×					
	+ Add option + Add other option with input						



- iii) The 'Create Page' dialog box opens.
- iv) Click the 'Save' option.

Create Page		×
Page Name * Page 2		0
	Save	Cancel

v) A new page gets added to the form.

San	nple Form 1 🥜			(+	Page
Question Contact Number	Select Answer Type Number	Contact Numbe	Held Identifier * 177_Contac		:
Number	Page saved successfully				
Question Email ID	Select Answer Type Textbox	Display Name Email ID	Field Identifier * 178_EmailI	8	:
Textbox					
		Save Qu	estions +	:	
Page 2					•

vi) Click the 'Add New Question' icon.

	Sample Form 🍃	(+ Page
Page 1		(+) : ^
		Add New Quection

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

BBB®			III 4 0
÷		Sample Form 🍃	(+ Page) 🚯 🏟
	Page 1		Save Questions + : ^
		Question added successfully	
	Question	Dropdown Display Name	Field Identifier * 1564998962142
	1. option 1		
	+ Add option		
			Save Questions +



- viii) 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**' **b** icon to save the question information.

Page 1	Save Questions + : ^
1 Question Select your gender option 1 Male option 2 Female 5 + Add option 6 + Add other option with	Select Answer Type 3 Display Name 4 Field Identifier * 7 11_Selecty
	Save Questions +

f. The newly added question gets saved, and a success message appears confirming the action.



Question	Select Answer Type	Display Name	Field Identifier *	8:
Select your gender	Chackbox	Felect your gender	11_Selecty	
option 1	Question save successfully			
Male				
option 2				
Female	×			

4.3.1. Page Settings

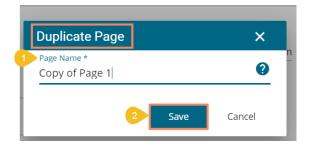
The users can get the Page Settings icon from the header panel of the page. By clicking the '**Page** Settings' icon, 3 settings options for a page get displayed:

Questions +	(;)	^	
Field Identifier *	1	Rena	ame
Field Identifier * ender 11_Selecty		Dupl	icate
	Ĩ	Dele	te
	Field Identifier *	Field Identifier *	Field Identifier * 11_Selecty

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

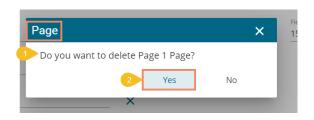


- 3. The selected page gets renamed.
- ii) **Duplicate:** Prompts to duplicate the selected page.
 - 1. The page name displays with the 'Copy of' prefix (E.g., Page 1 reflects Copy of Page 1.)
 - 2. Click the 'Save' option.





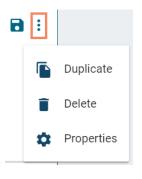
- iii) **Delete:** Prompts to delete the selected page.
 - 1. A new window opens, asking to confirm the action of deletion.
 - a. Click the 'Yes' option if wish to delete the page.
 - b. Click 'No' option if wish not to delete the page.



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:



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.

Sample	Form 🧪			(+ Pa
option 2 Female	X Question copied successfully			
+ Add option + Add other option with				
Question Select your gender	Select Answer Type Checkbox	Display Name Select your gende	Field Identifier * 12_Sele	•
option 1 Male	×			
option 2 Female	×			
+ Add option + Add other option with inpu	ıt			
		Save	Questions +	:



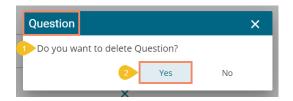
3. The copied question gets added below the selected question as mentioned in the below image:

Sample	Form	1				
Page 1				Save Questions	+	:
Question Select your gender		Select Answer Type Checkbox	Display Name Select your gender	Field Identifier * 11_Selecty		8
option 1 Male	_ ×					
option 2 Female	×					
Question		Select Answer Type	Display Name Select your sender	Field Identifier *		8
Select your gender		Спескрох	r Select your gender	12_Sele		
Male	×					
Female	×					
+ Add option + Add other option with input						

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:



uestion Prope	erties		×
Properties	2 Condition	3 Lookup	
Placeholder Choose your cour	ntry		0
Required:	⊖ Yes	O No	•
Disabled:	⊖ Yes	O No	0
Question Tooltip			0
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.

Mention your religion. *
Placeholder text

- 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.



rror Message rror Message	0
inor wessage	
refix example \$,@,& ;	0
ostfix example \$,@,& D	0
efault Value	0
Save	Cancel

The preview page describes:

Mention 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.

Mention your religion. * \$ default value

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.



ndia 2	None	
JSA	Hide Questions	
	Disable Questions	
JK	Select condition type 👻 🕐	
Australia	Select condition type 👻 🕐	

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.

ns				Connecte	ed []
	Lookup Option 🖍		+ Page	🗠 🤻	\$ <
	Page 1	Save Questions +	^		
	Guestion Select Your Religion. Select Your Religion. Select Your Religion. Select Your Religion Select Your Religion Select Your Religion Select Your Religion Select Your Religion	Field Identifier * o 58_Selecty	:		
A Revenue	2. Islam ×				
2	+ Add option + Add other option with input		_		
a de la companya de l	Question Select.Answer Type Display Name Mention your religion. Textbox Mention your religion	Field Identifier *	:		
	Textbox				

- 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 Proper	ties		×
Properties	Condition	4 Lookup	
5 Lookup:	O Yes	O No	0
Select Question Mention your relig	ion.		6
Save			Cancel

viii) Save the questions and publish the form.

÷	Lookup Option 🖍 🔶 🔶 🏚
	Page 1 Save Questions + : ^
	Ouestion Select Answer Type Display Name Field Identifier * Select your Religion. Dropdown ▼ Select your Religio 58_Selecty 8 Form ×
	Hinduism Do you want to publish this form?
	2. Islaam Yes No
	option 3 3. Christianity X

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

9	My Documents > Lookup Option >	
	Page 1	≡,∕
	Select your Religion.	8
	10 Hinduism	
	Islaam	
	Me Christianity	
	Submit	

xi) Give response for the Question no. 2



My Documents > Lopkup Option >	a ::	
Page 1		≡,∕
Select your Religion.		8
Mention your religion.		
Submit		

xii) Save the response.



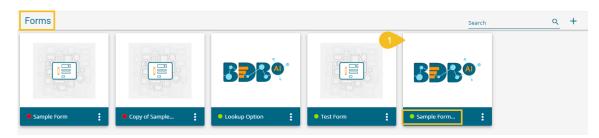
- xiii) Check the available options for Question no. 1.
- xiv) The response for the Question no. 2 gets added in the lookup.

My Documents > Looku	ip Option 🗲	8	0
Page 1			=,∕
13 Sele	ct 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.



BBR [®]							4 <mark>11</mark>	?	W
÷	Sample Form	1 🧪			(+	Page) 🖪	2	0
	Page 1		Save Qu	estions +	:	^			
	Question Select your gender.	Select Answer Type Checkbox	Display Name Select your gen	Field Identifier * 174_Select		:			
	Male	×							
	option 2 Female	×							
	+ Add option + Add other option with input								

Or

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

• Sample Form	°	
	1	Edit
	Î	Delete
		Duplicate
	0	Preview
	•	Publish
	¢	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.



BBB®				Ļ	1	?	W
🔶 🎊 Samp	ble Form 1		Ţ	6	\$	/	0
	Page 1						
	Select your gender. Male Female						
	Name Fill all the mandatory questions.	×					
	Address	Go to form					
	Contact Number						

v) The Form content opens in the preview mode.

← 🔐 Samp	le Form 1		Ţ	٥	۵	0
	Page 1					
	Select your gender. Male Female					
	Name					
	Address					
	Contact Number					

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
1	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	rm 🖍			+1	>
Page 1		Save	Questions +	: ^	
Question Select your gender	Select Answer Type Checkbox	Display Name Select your gende	Field Identifier * 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.

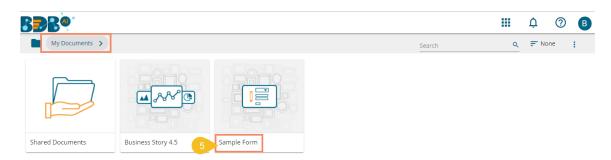


iv) A success message appears to confirm the action of the publish.



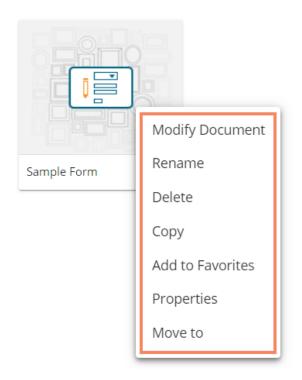
C DECKDOX	~	Se
Form has been published succe	essfully.	

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



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.



	Modify Document
Sample Form	Rename
	Delete
	Сору
	Add to Favorites
	Properties
	Move to

- 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 Forms	×
Name *	
Sample Form	
Description	
Description	
	3
	Close Save

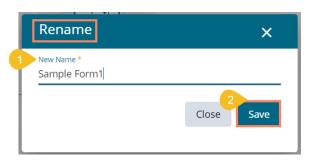
iv) The selected information gets modified, and a message appears to assure the same.



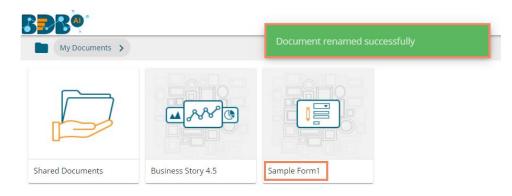


4.5.1.2. Renaming a Form

- 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.



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.

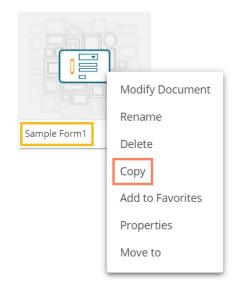
Delete		×
Do you want to delete selecte	d document	?
	Close	Delete

iv) The selected form gets deleted.

4.5.1.4. Copying a Form

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

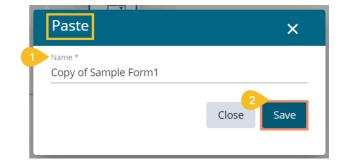




- ii) Use the right click on another folder or on the blank space to get the 'Paste' option.
- iii) Click the 'Paste' option.

BBB@			
My Documents >			
			Create New Folder Link a URL Paste
Shared Documents	Business Story 4.5	Sample Form1	Create New Story

- 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.



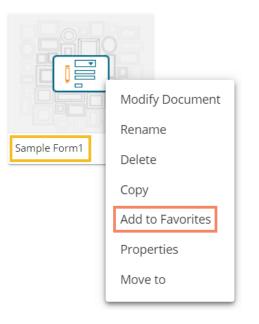
vi) The pasted form gets saved with the new name.



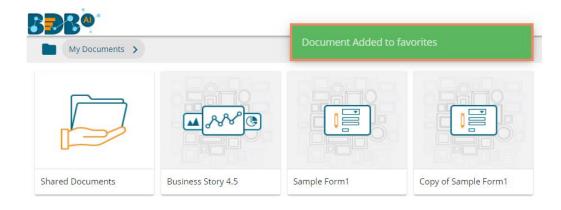
My Documents >			
	▲ ~~~®		
Shared Documents	Business Story 4.5	Sample Form1	Copy of Sample Form1

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.



iii) Open the Favorites section.



	My Docu	ments >
N	ly Docum	ents
P	ublic Doc	uments
S	hared Doo	cuments
F	avorites	

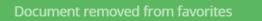
iv) The selected Form gets added to the Favorites.



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



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





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	Share with User Share with Group Exclude >
Created by:	bdbuser
Туре:	
Where:	My Documents
Created:	Mon Aug 05 2019 17:28:31 GMT+05:30 (India Standard Time)
Modified:	Mon Aug 05 2019 17:43:31 GMT+05:30 (India Standard Time)
Version:	4.5.0
Description:	
Upload Imag	Choose Files No file chosen 2 Save

iii. A message appears to assure about the update.

Properties		e has been uploaded successfully		
Sample Form1				
< Properties		Share with User Share with Group Exclude >		
Create	d by:	bdbuser		
1	Type:			
W	here:	My Documents		
Cre	ated:	Mon Aug 05 2019 17:28:31 GMT+05:30 (India Standard Time)		
Mod	ified:	Mon Aug 05 2019 17:43:31 GMT+05:30 (India Standard Time)		
Ver	sion:	4.5.0		
Descrip	tion:			
Upload Image:		Choose Files 100X40.png Save		

- **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 by using a checkbox in the given box.



iii. Click the 'Save' option.

Properties			×
Sample Form 1	Share with User	Share with Group	Exclude >
BDB bdbuser@bdb.ai			S
admins admin@bdb.ai			
cluster_two cluster2@bdb.ai			
clusters cluster1@bdb.ai			
		Close	Save

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

Properties	Document privilege has been 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.

Properties			×
Sample Form 1	Share with User	Share with Group	Exclude >
			3/22
Permission			
BizViz Partners			
Demo Viewers			
ABCGroup			
ETLTest			
BI Trainees			
		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 Form 1	Share with User	Share with Group	Exclude Users >
pa pa@bdbizviz.com			
paone pa01@bdbizviz.com			
jijo @bdbizv	iz.com		
Ken @bdbizvi	z.com		
			Close Save

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

Document privilege has been updated successfully

4.5.1.7. Moving a Form

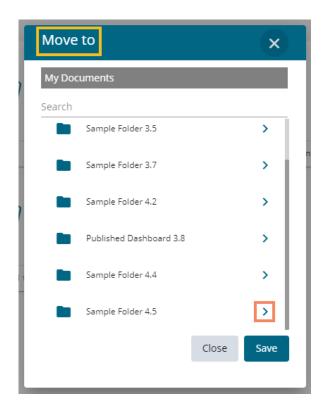
This option allows the user to move the Form from one folder or space to another folder.

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



Modify Document Rename
Rename
Sample Form1 Delete
Сору
Add to Favorites
Properties
Move to

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



- vi) Users get redirected to the next screen displaying the selected folder name at the top.
- vii) Click the 'Save' option.



Move to	×
← Sample Folder 4.5	
Search	
Sample Sub-Folder 4.5	>
Clo	ose 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.

	Ļ ¹¹	?	W
My Documents Sample Folder 4.5 Sample Form 1 S			0
Address			=,
2 BDBizviz Technologies, Bang			-~
			8
Contract Museulour			
Contact Number			
080234567			
Email ID			
bdbuser@bdb.ai			
bdbuser@bdb.al			
3 Submit			

- iv) An acknowledge message appears to inform that the shared response has been saved. (The user can also use the '**Save**' sicon to save a response.)
- v) Click on the link 'Click here to view the response' or 'View Response' $\stackrel{=}{=}$ icon.

vi)							
	My Documents 🗲	Sample Folder 4.5 >	Sample Form 1 >		I		13
					•	5	≡∕
			4	Response saved successfully			
			5	Thank you			

- vii) All the collected responses appear in the tabular format.
- viii) The admin can further **Edit** (*r*) or **Delete** (**i**) the collected responses by using the icons given under the '**Actions**' column.

Į	B	Bø.						¢ ¹¹	?	W
		My Documents >	Sample Folder 4.5 > Sample	Form 1 ゝ						0
	Action	ns	Select your gender.	Name	Address	Contact Number	Email ID			2
	1	Î	Female	BDB User	BDBizviz Technologies, Bangalore	80234567	bdbuser@bdb.a	ai		*
	/	Î	Male							
	1	ĩ	Male	Admin						

ix) Click the '**Export in Excel**' $\stackrel{\bullet}{=}$ icon to download the responses in an excel file.



Actions	Select your gender.	Name	Address	Contact Number	Email ID	
/ =	Female	BDB User	BDBizviz Technologies, Bangalore	80234567	bdbuser@bdb.ai	1
/ 1	Male					
/ =	Male	Admin				

- x) 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.

B₽B●		 ¢ <mark>11</mark>	?	W
My Documents > Sample Folder 4.5 > Sample Form 1 >				0
Actions	Select your Nation			2
/ 1				±
2.1				₹
Z 1				
/ 1	India			

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.

My Documents 🗲 Sample Form								
Action	ns	Select your gender.	Name	City	Choose your country	Contact Number	Email ID	
1	i	Female						
1	ŧ.	Male	William Martin	New York	USA	23232423343	willaimmart@getmail.com	
/	•	Female	Daisy Brown	San Francisco	USA	545084080	daisybrown34@getmail.com	
1	ŧ	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.

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

iv. The responses get filtered by the selected user.

₽₿Ф°		III 4 <mark>11</mark> (2)
My Documents > Sample Folder	4.5 > Sample Form 1 >	8
Actions	What is your name?	Give your mail id?
Z #	Archana Kumari	archana.ms@bdb.ai



Note:

- a. It is mandatory to publish a Form to get responses.
- b. The user can use the 'Save' cicon to save the response.

BBB®	 ¢ ¹¹ ()	W
My Documents Sample Folder 4.5 Sample Form 1 S	a 0	
Page 1		₹⁄
Select your gender. Male Female Pemale		3

4.7. Form Settings

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

- i) Select the 'Settings' icon 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' 🛅 icon to reflect the altered settings in the selected Form.

Form Settings			×
Properties 2 Theme 3	Form Instruction per user		
Status: 💶 Enable			G
Configurations:			
Expiry Date:	Choose a form expiry date		×
Total number of response:	Enter total no of response		
Per user response:	Value must be a number, not in decimal/float 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?	O Yes O No		
Default view mode	● Form Entry		

4.7.1. Properties

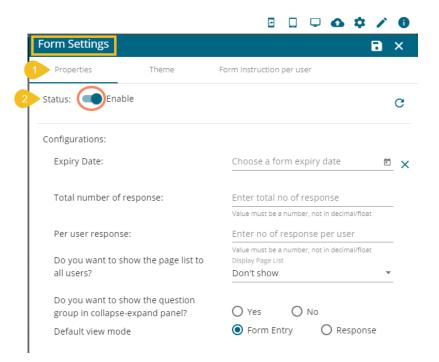
The users can set or alter various Form properties using the Properties tab displayed under the Form Settings option. This section explains all the listed Form properties.



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.



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

	Form Settings			4 🖪 ×
	Properties	Theme	Form Instruction per user	
3	Status: Disable			
		-		

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



Page 1					Save Questions	+	÷
Question		*** Select Answer Type		Display Name	Field Identifier *		
Select your gender.			-	Select your gender.	174_Select		•
option 1	×						
option 2	~ ~ ~						
Female	×						

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 Setti	ngs	<u></u>	3	×
2 Properties	Theme	Form Instruction per user		
Status: 🗨	Enable			C
3 Configuratio	ons:	Choose a form expiry date		
Expiry Da	ite:	8/5/2019		×
Total nun	nber of response:	Enter total no of response 3		
		Value must be a number, not in decimal/float Enter no of response per user		
Per user	response:	1	\$	
Do you w all users?	ant to show the page list to	Value must be a number, not in decimal/float Display Page List Don't show	-	
2	vant to show the question collapse-expand panel?	O Yes O No		
Default vi	iew mode	● Form Entry		

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' = 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 Folder 4.5 > Sample Form 1 >	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' \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 Folder 4.5 Sample Form 1	E	0
		=,
Administrator has set a restriction of a maximum of 1 entry of per user 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		
		_

4.7.2. Theme

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



Form Settings			B ×
Properties	Theme	Form Instruction per user	
Form Header Theme			~
Page Header Theme			~
Form Body Theme			~

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

4. 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

1 Form Settings		4 🖬 ×
Properties 2 Theme	Form Instruction per user	
3 Form Header Theme		^
Alignment:	Header 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:		



5. 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		,
Alignment:	Page Alignment Left	+
	Font Variant	
Font Variant:	Normal	*
Font Style:	Font Style Normal	~
Font Weight:	Font Weight Normal	*
Font Size:	Font Size	
FORE SIZE.	10	
Background Color:		
Font Color:		

6. 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		5 🖬 ×	<
	Properties 2 Theme	Form Instruction per user		
3	Form Body Theme		^	5
4	Question Theme Properties:	Font Variant		
	Font Variant:	Normal		
	Font Style:	Font Style Normal	Ŧ	
	Font Weight:	Font Weight Normal	•	
	Font Size:	Font Size		
	Question Left Border:			

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		5 🖬 🔇	×
Properties 2 Them	e Form Instruction per user		
	<u>-</u>		
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		

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.



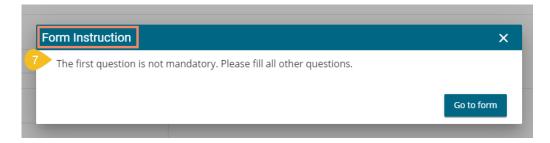
- iv) Insert a specific instruction in the given space.
- v) Click the 'Save' option.

Properties	Theme 2	Form Instruction per user	1
Select User administrator@b	odb.ai		Č
	$\mathbf{x}_{\mathbf{z}} \times^{\mathbf{z}} \mathbf{I}_{\mathbf{x}} \stackrel{1}{=} \stackrel{1}{=} =$	() () () () () () () () () () () () () (≻¶ ¶ा∢
Styles - Nor	mal 🗸 Font 🗸	ease fill all the other quest	ions.

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

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

- i) Click the 'User Profile' icon ${}^{\textcircled{}}$ on the Platform homepage.
- ii) Click the 'Sign Out' option.



_			Ļ <mark>11</mark>	
	Will Will	liam Mar	rtin	
-	e My A			
	i Abou			
2	U Sign	Out		

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

Note:

- a. By clicking the 'Sign Out' option, the user gets back to the Sign-in page of the BDB platform.
- b. Click the 'About' option to open the default welcome page of the BDB Platform.

